Metrics That Matter:
A Canadian Brand Lift Study

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Introduction

TV has been proven to drive a range of business results, from top-of-funnel brand building to bottom-funnel sales activations. While TV's ability to build brands and drive store and website visits is well documented, we wanted to understand TV advertising's impact on key brand metrics like *Consideration, Value* and *Word of Mouth*.

In this study, we used YouGov's BrandIndex tool to track changing brand metric scores across dozens of products and services in several categories and mapped those results against paid TV GRPs.

The results: TV advertising consistently drove remarkable increases in key brand metrics in every category: For example in the automotive category, the *Brand Value* metric saw an 8x increase among Ad Aware vs. Unaware audiences; in the QSR category, TV advertising drove reported levels *Consumption* by 8x, and we saw an even higher increase in *Purchase Intent* in the Financial category.

Read on for all the details.

What this study covers

Our analysis tracked flights of TV advertising against surveyed brand metrics. We look at Ad Aware vs Unaware audiences, as well as day-by-day performance of on-air campaigns.

- 10 categories

- Over 75 active brands analyzed

- Focusing on examples from QSR, Automotive, and Financial

- Study Results have been reviewed and approved by YouGov

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Our analyst and research tool

Our Analyst – **Daniel Iwasa-Madge**

○ Chief Consultant and Data Storyteller, data/story inc.

○ Extensive experience with Media Mix Modeling, Data Strategy, Neuromarketing

○ Wide experience across Canadian brands, agencies and broadcasters

YouGov® BrandIndex

450+ Canadian brands
Regularly updated and growing

13 sectors
Covering all major industries

Panel members
Representative panel of 360,000 adults aged 18+ in Canada

Maximum of 30 brands shown to any panel member at any given time

Daily surveys
Up to 100 respondents take each sector survey on a daily basis

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QSR
category

- Over 42,000 GRPs Jan-May 2022

- Among On-Air brands, the average weekly GRPs was 101.5 / week

- Brands were On-Air ranging from a single week up to every day

- Heavily varied flighting patterns – Build up, Taper Down, Pulsing

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*Each GRP represents impressions equal to 1% of the total TV viewing population

QSR Category – Brand Attributes

Key Brand Attributes we looked at:

- Consideration
- Purchase Intent
- Quality
- Value
- Positive Impression
- **Current Customer (Past 4 weeks)**
- WOM – Discussed the brand in the past 2 weeks

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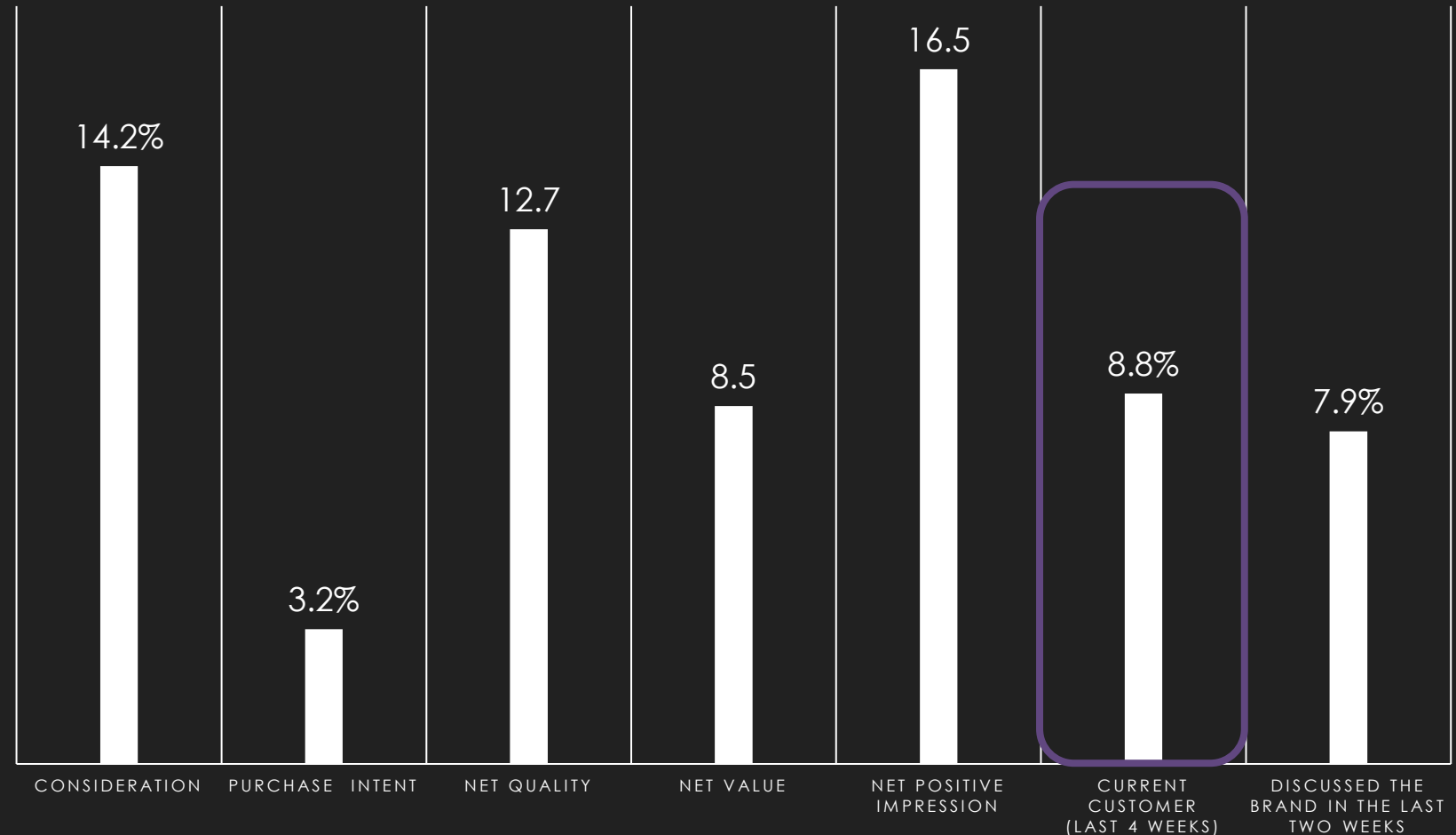
QSR Category Average – total population

The QSR category introduces us to some reoccurring patterns in brand attributes we'll see across categories.

We see Consideration, Quality and Positive Impression scoring well.

Purchase Intent is quite low.

While Value, Current Customer and WOM are sitting in the middles ground.

These scores include both Ad Aware and Ad Unaware audiences.

14.2%	3.2%	12.7	8.5	16.5	8.8%	7.9%
CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	CURRENT CUSTOMER (LAST 4 WEEKS)	DISCUSSED THE BRAND IN THE LAST TWO WEEKS

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QSR Category – Unaware

Looking specifically at the Ad Unaware group we see those same patterns repeat themselves but with far lower scores.

The same relative ranking of scores persists.

CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	CURRENT CUSTOMER (LAST 4 WEEKS)	DISCUSSED THE BRAND IN THE LAST TWO WEEKS
9.7%	1.7%	9.1	4.7	11.7	4.7%	3.9%

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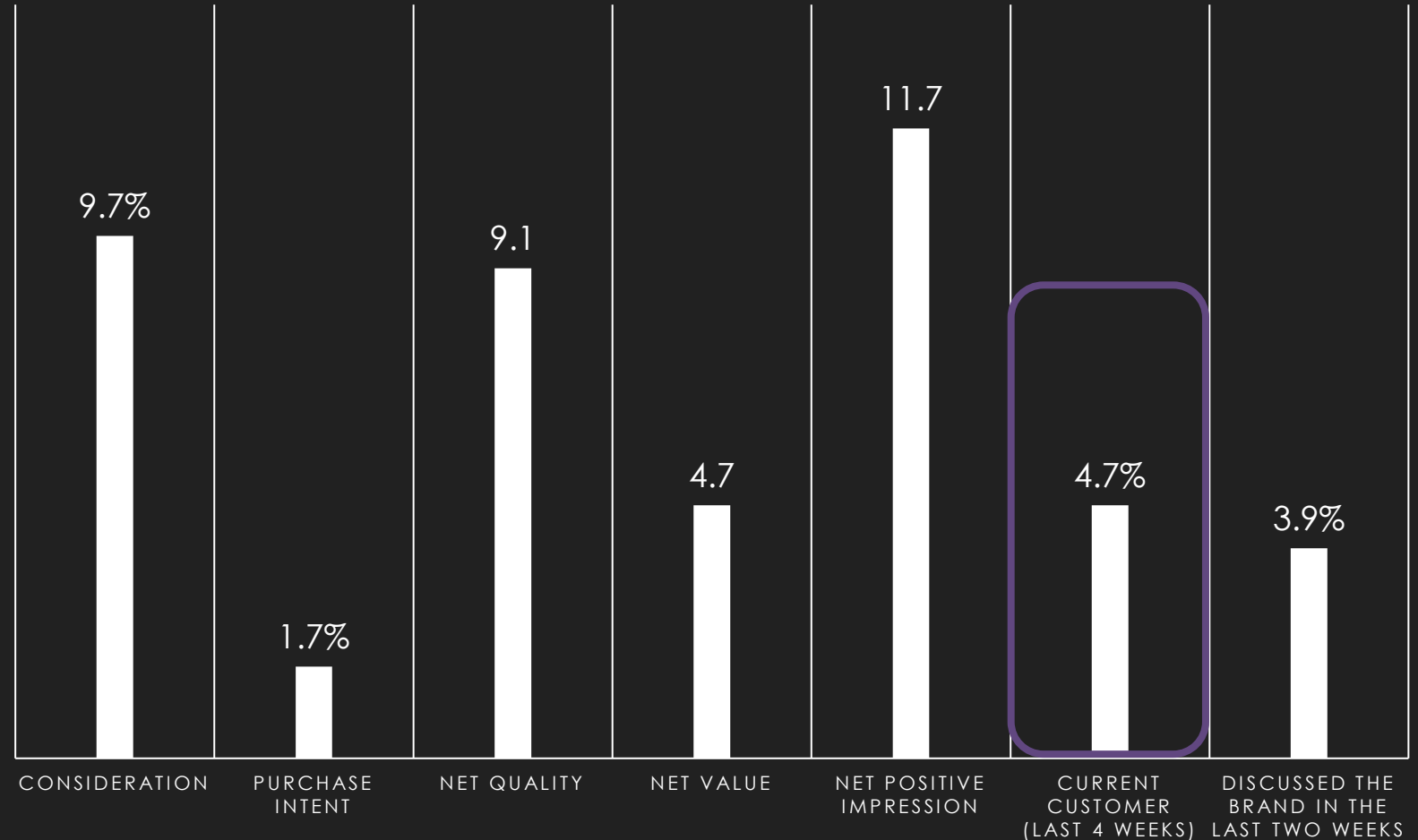
QSR Category – Unaware vs Aware

The Ad Aware respondents, however, show substantial increases across all metrics.

Struggling scores show improvement, and notably, we see business results through the Current Customer score rising substantially.

CONSIDERATION
- 9.7%
- 46.5%

PURCHASE INTENT
- 1.7%
- 13.7%

NET QUALITY
- 9.1
- 38.6

NET VALUE
- 4.7
- 36.1

NET POSITIVE IMPRESSION
- 11.7
- 51.1

CURRENT CUSTOMER (LAST 4 WEEKS)
- 4.7%
- 38.3%

DISCUSSED THE BRAND IN THE LAST TWO WEEKS
- 3.9%
- 36.2%

Legend: ■ Unaware ■ Ad Aware

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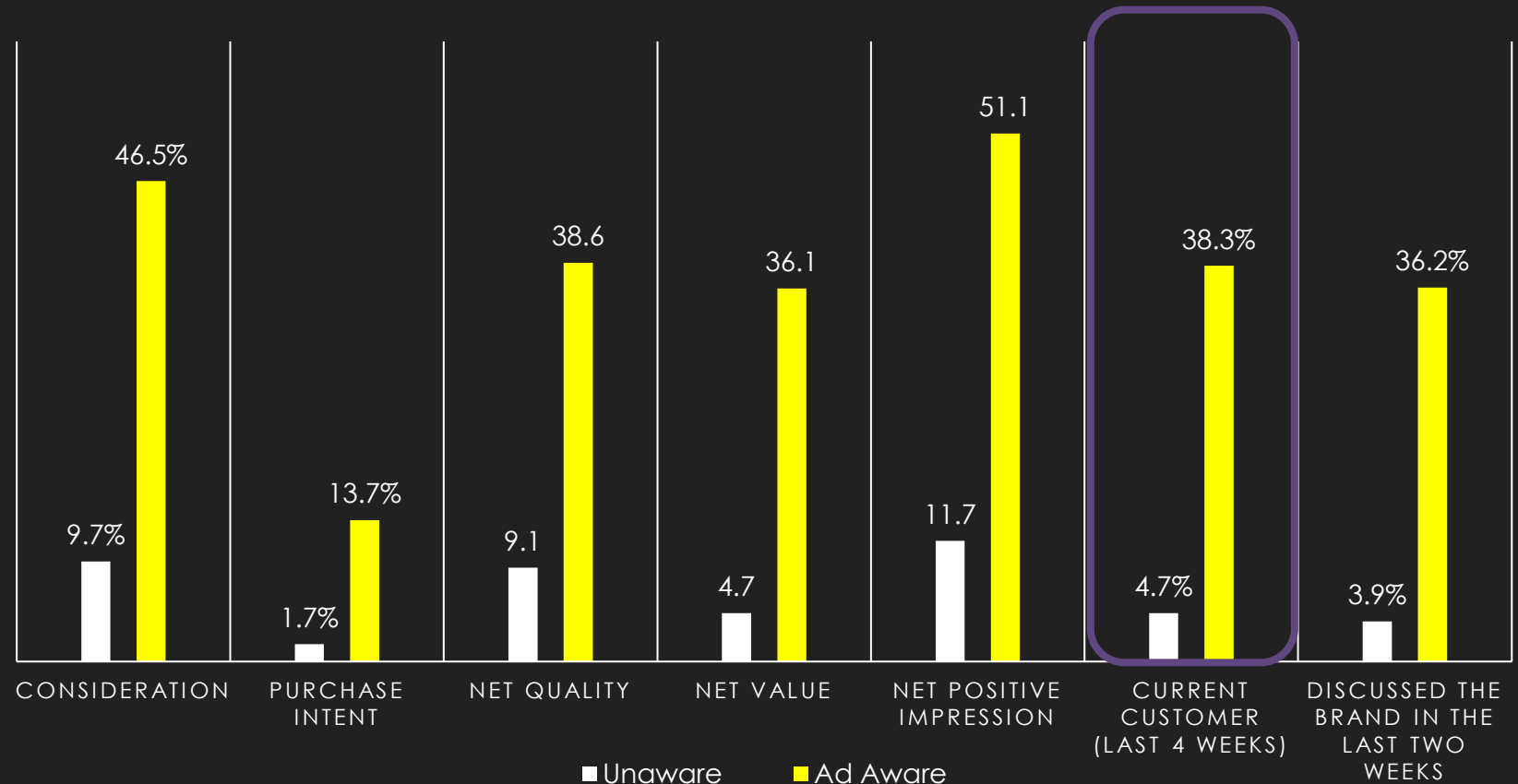
QSR:
Let's look at a few brands

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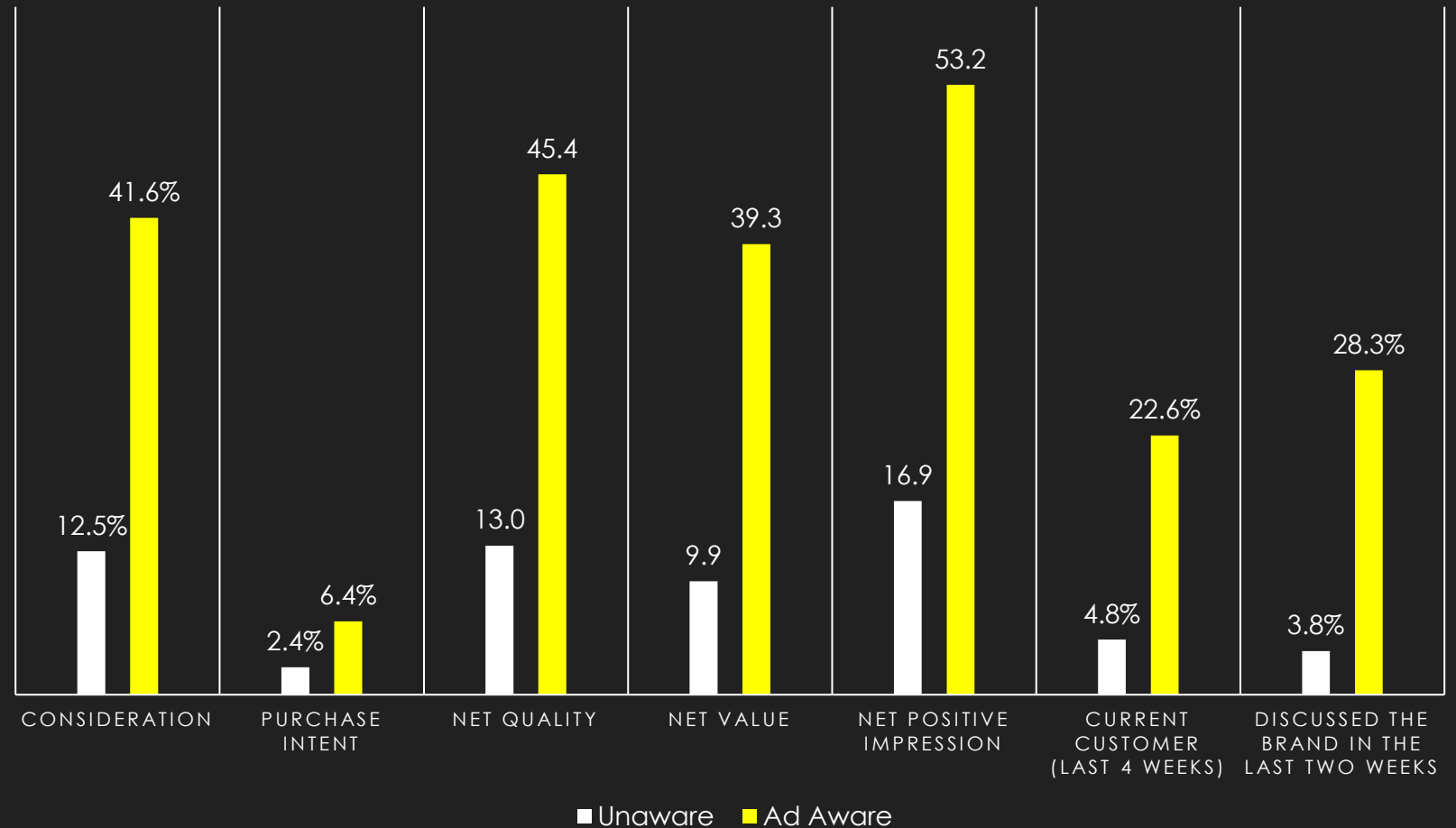
Brand scorecard – Brand A

Sub-Category: Burger Restaurant

GRP levels: ~700

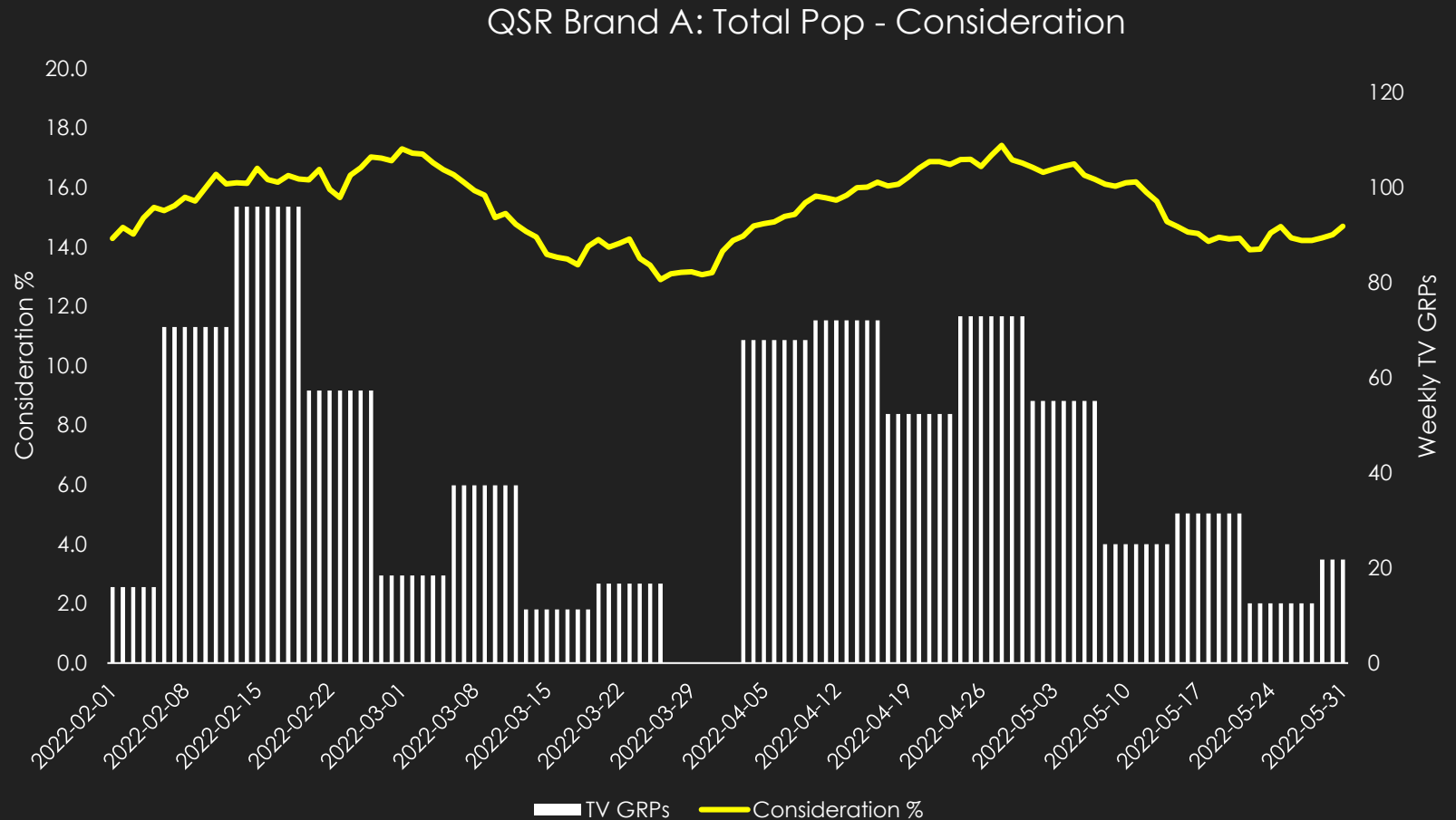Campaign Length: 16 Weeks

Ad Aware: 10.8%

Notes: This brand follows the category pattern of scores – but with massive increases in the Ad Aware cohort.

	Unaware	Ad Aware
CONSIDERATION	12.5%	41.6%
PURCHASE INTENT	2.4%	6.4%
NET QUALITY	13.0	45.4
NET VALUE	9.9	39.3
NET POSITIVE IMPRESSION	16.9	53.2
CURRENT CUSTOMER (LAST 4 WEEKS)	4.8%	22.6%
DISCUSSED THE BRAND IN THE LAST TWO WEEKS	3.8%	28.3%

■ Unaware   ■ Ad Aware

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Brand A – Looking at Flights

Isolating down the TV flights during the analysis period, we can see a clear relationship between GRPs on-air and Consideration fluctuations.
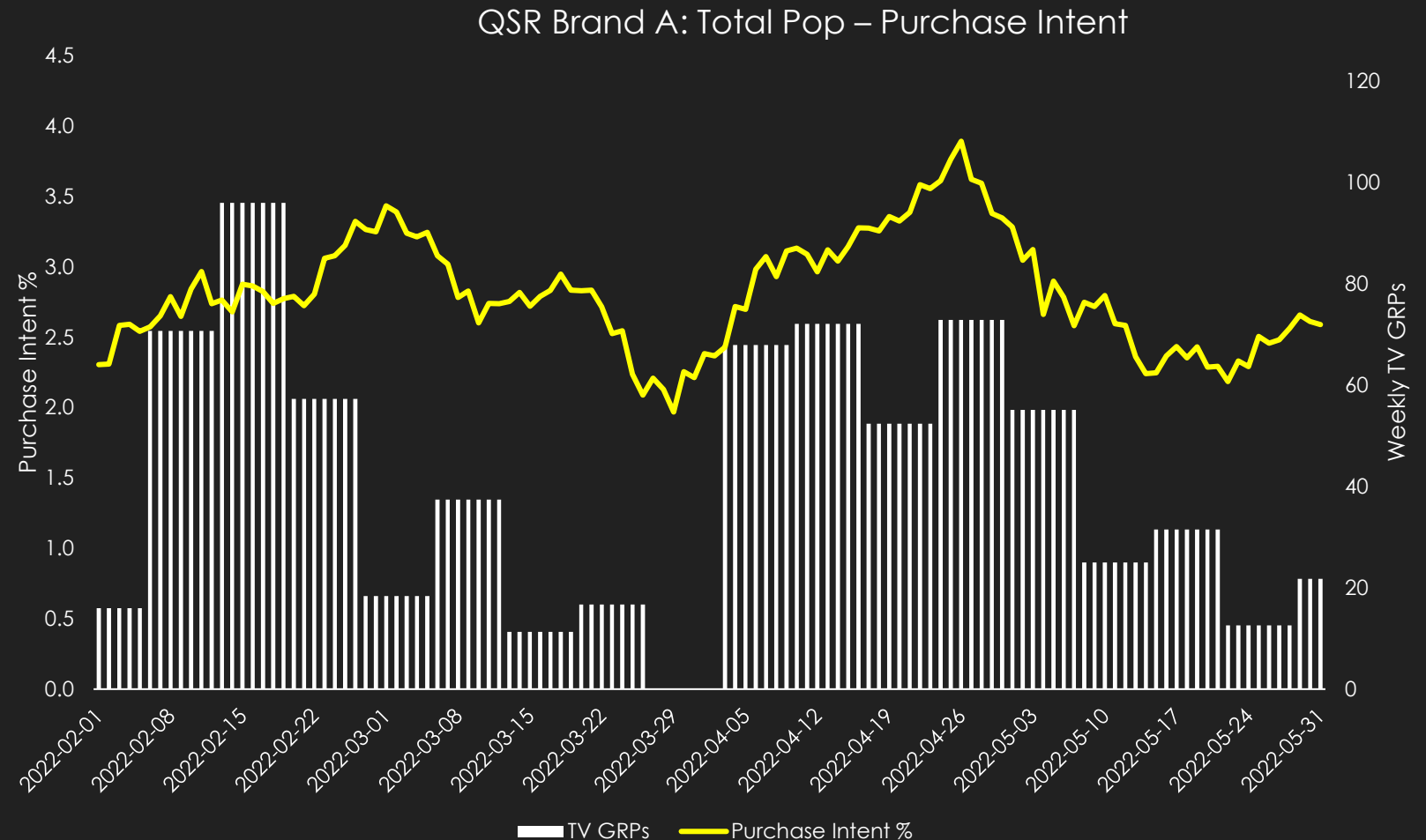
Notably, this is mapping against Total Population Audience, not just Ad Aware.

QSR Brand A: Total Pop - Consideration

Legend: ▮ TV GRPs ━ Consideration %

Y-axis (left): Consideration % — 0.0, 2.0, 4.0, 6.0, 8.0, 10.0, 12.0, 14.0, 16.0, 18.0, 20.0
Y-axis (right): Weekly TV GRPs — 0, 20, 40, 60, 80, 100, 120
X-axis: 2022-02-01, 2022-02-08, 2022-02-15, 2022-02-22, 2022-03-01, 2022-03-08, 2022-03-15, 2022-03-22, 2022-03-29, 2022-04-05, 2022-04-12, 2022-04-19, 2022-04-26, 2022-05-03, 2022-05-10, 2022-05-17, 2022-05-24, 2022-05-31

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Brand A – Looking at Flights

Purchase Intent, notoriously hard to move for QSR due to social-desirability bias, shows a very similar pattern of response to on-air GRPs.

This metric does take slightly longer to show full effect of TV weight, taking an additional week or so to peak.

QSR Brand A: Total Pop – Purchase Intent

Legend: TV GRPs, Purchase Intent %

Source: YouGov BrandIndex: Jan 2022 - May 2022, NLOGIC Active Brands Report
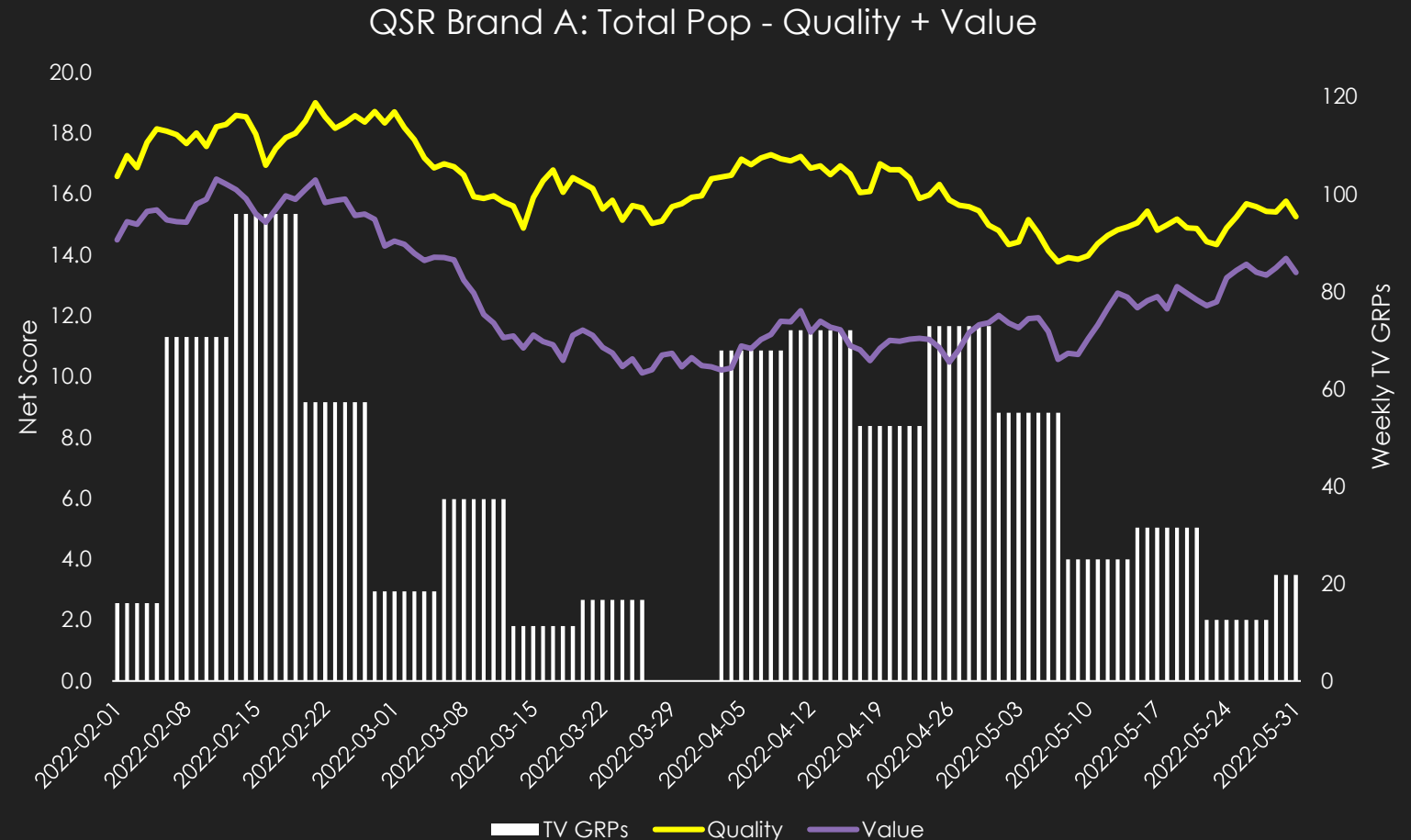
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Brand A – Looking at Flights

Perceptions of Quality shows a very similar pattern.

Perceptions of Value is similar but shows a much slower and more gradual response to the second flight of TV.

This may be due to possible changes in creative between the flights.

QSR Brand A: Total Pop - Quality + Value

Legend: TV GRPs, Quality, Value

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Brand A – Looking at Flights

Importantly, Current Customer demonstrates that same pattern of response we saw in Consideration.

The increase begins quickly and scores rise consistently with TV GRPs on-air.

Given the quick purchase cycle and low barriers to purchase, this response pattern makes a lot of sense.

QSR Brand A: Total Pop - Current Customer (Last 4 weeks)

Legend: TV GRPs (bars) — Current Customer (line)

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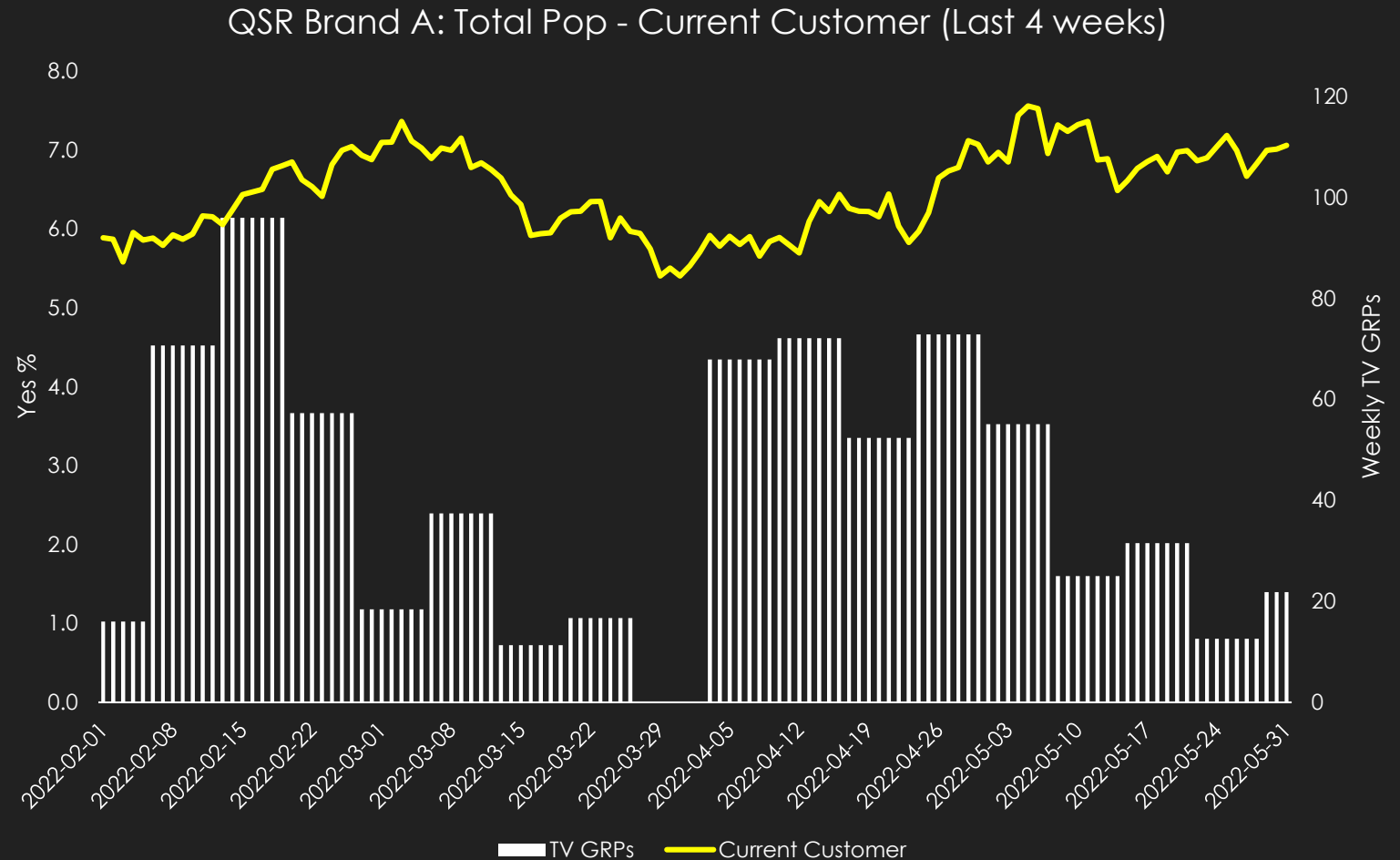
Brand scorecard – Brand B

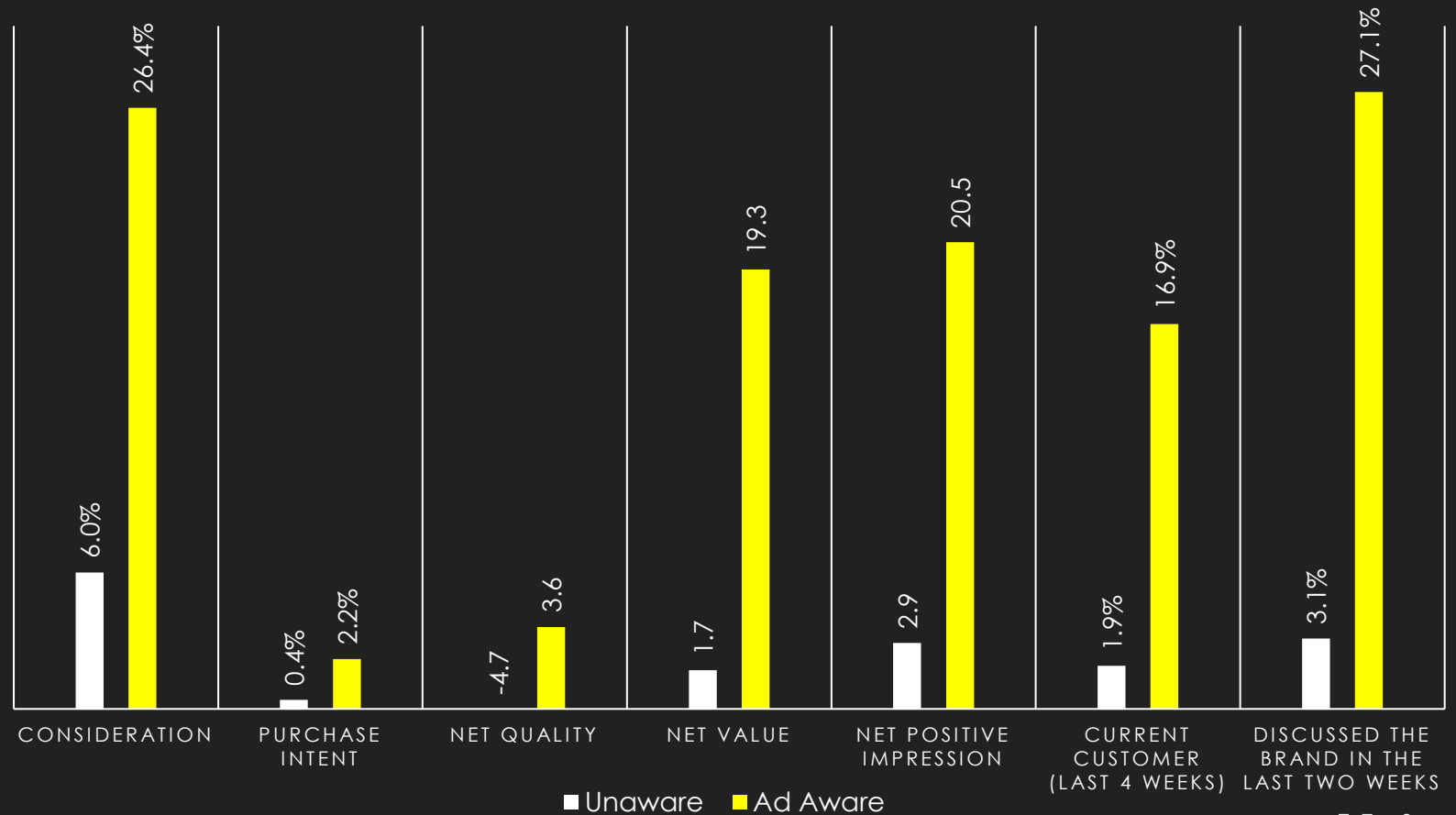Sub-Category: TexMex Restaurant

GRP levels: ~500

Campaign Length: 11 Weeks

Ad Aware: 8.9%

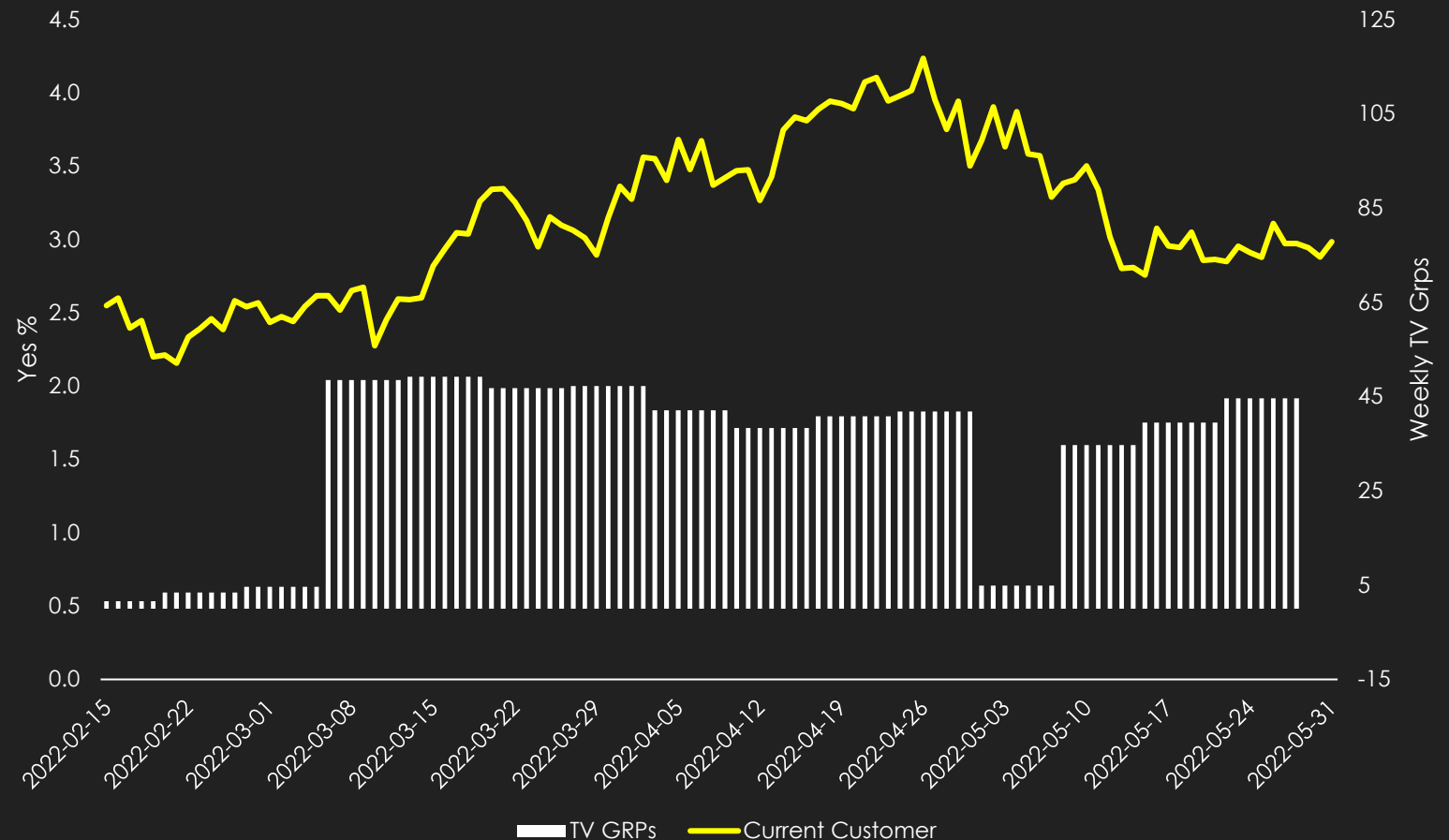Notes: This brand has far more embattled scores. We can see a particularly low perceived Quality score.

The TV campaign itself has a relatively low number of GRPs across more weeks.

However, we still see that same pattern of significant improvements in the Aware audiences.

	CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	CURRENT CUSTOMER (LAST 4 WEEKS)	DISCUSSED THE BRAND IN THE LAST TWO WEEKS
Unaware	6.0%	0.4%	-4.7	1.7	2.9	1.9%	3.1%
Ad Aware	26.4%	2.2%	3.6	19.3	20.5	16.9%	27.1%

■ Unaware ■ Ad Aware

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Brand B – Looking at Flights

Even for a brand with such a low baseline Current Customer score, we see steady and substantial increases coinciding with TV weight on-air.

Relatively low levels of GRPs still coincide well with increases in self-reported purchase of the brand.

QSR Brand B: Total Pop - Current Customer (2 weeks)

Legend: TV GRPs, Current Customer

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Brand scorecard – Brand C

Sub-Category: Pizza Restaurant
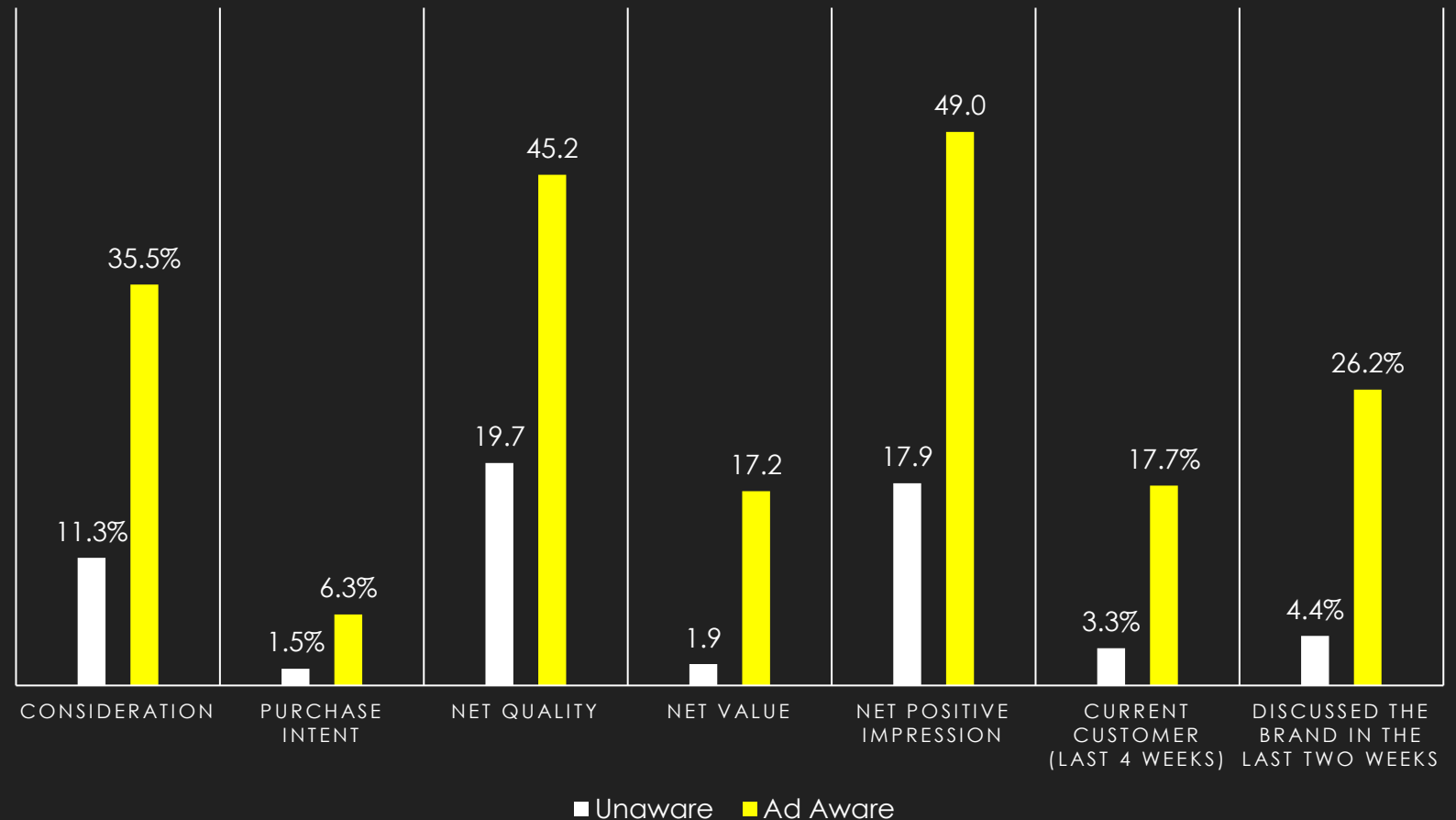
GRP levels: ~1000

Campaign Length: 13 weeks

Ad Aware: 11.5%

Notes: This brand shows us some slightly healthier baseline scores, following the same pattern we saw for the category as a whole.

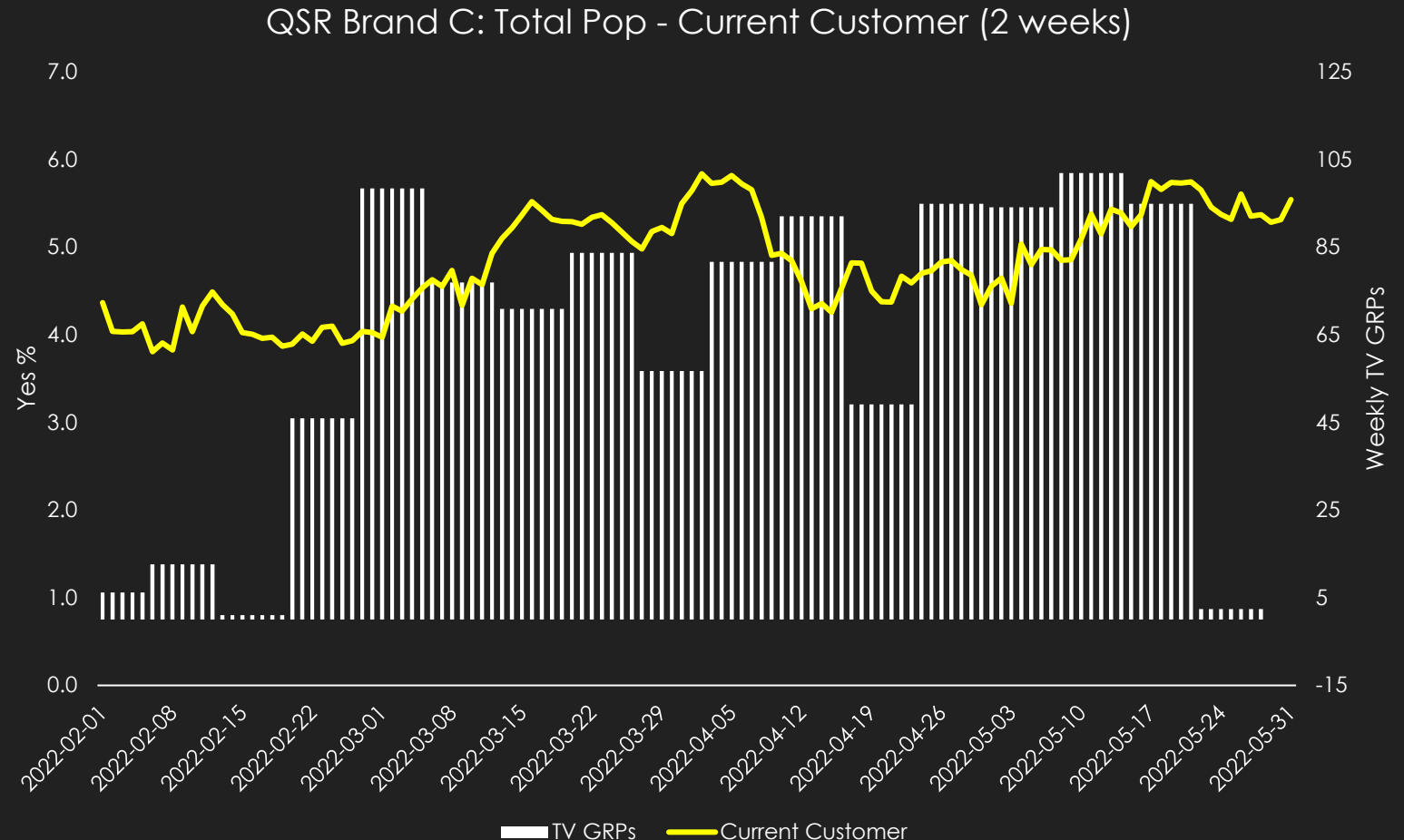This TV campaign has a greater number of overall GRPs, but also a larger number of weeks.

We see that same pattern of significant improvement for Aware audiences.

■ Unaware ■ Ad Aware

	CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	CURRENT CUSTOMER (LAST 4 WEEKS)	DISCUSSED THE BRAND IN THE LAST TWO WEEKS
Unaware	11.3%	1.5%	19.7	1.9	17.9	3.3%	4.4%
Ad Aware	35.5%	6.3%	45.2	17.2	49.0	17.7%	26.2%

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Brand C – Looking at Flights

Although starting at a healthier level, we see that same pattern for Brand C that we saw for Brand B, albeit with somewhat increased TV GRP levels.

We can see that same steady increase through the campaign, followed by a plateau at the end of the campaign after weight levels drop.

QSR Brand C: Total Pop - Current Customer (2 weeks)

Legend: TV GRPs — Current Customer

Source: YouGov BrandIndex: Jan 2022 - May 2022, NLOGIC Active Brands Report

Auto Category

Auto:
A look at the category

- Over 31,000 GRPs Jan-May 2022

- Among On-Air brands, the average weekly GRPs was 70.1 / week

- Brands were On-Air at slightly lower levels but for more weeks overall

- Focus on pulsing flighting patterns – peak and valleys

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Auto Category – Brand Attributes

Key Brand Attributes we looked at:

- Consideration
- Purchase Intent
- Quality
- **Value (Highly Volatile in this Category)**
- Positive Impression
- WOM – Discussed the brand in the past 2 weeks

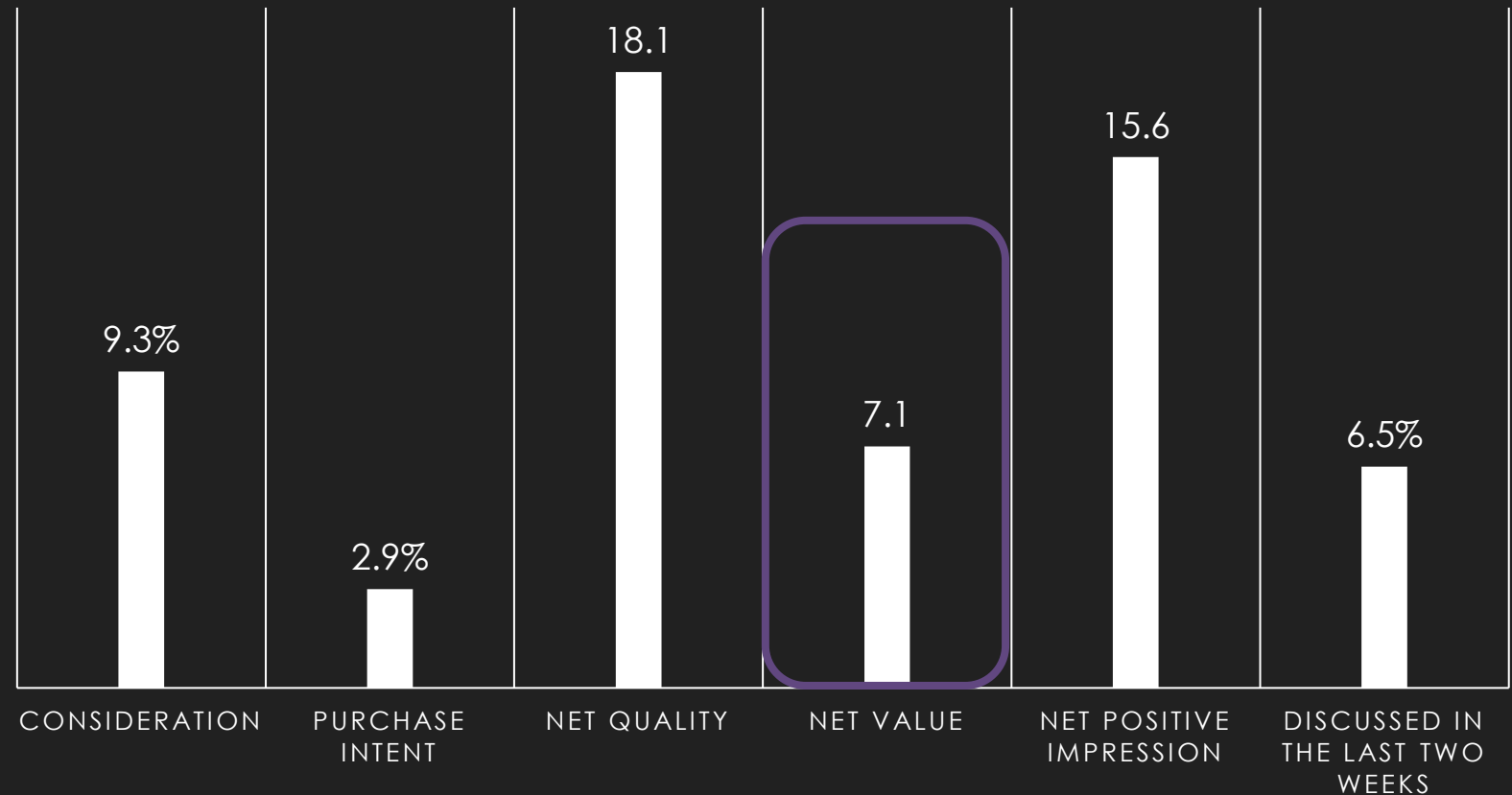Notably, Auto category scores were all in decline over the analysis period

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Auto Category – Category Average

Despite being a far different category, we can see some similar patterns in terms of brand scores for the Auto category.

High Quality and Impression scores, and lower Purchase Intent, Value and WOM.
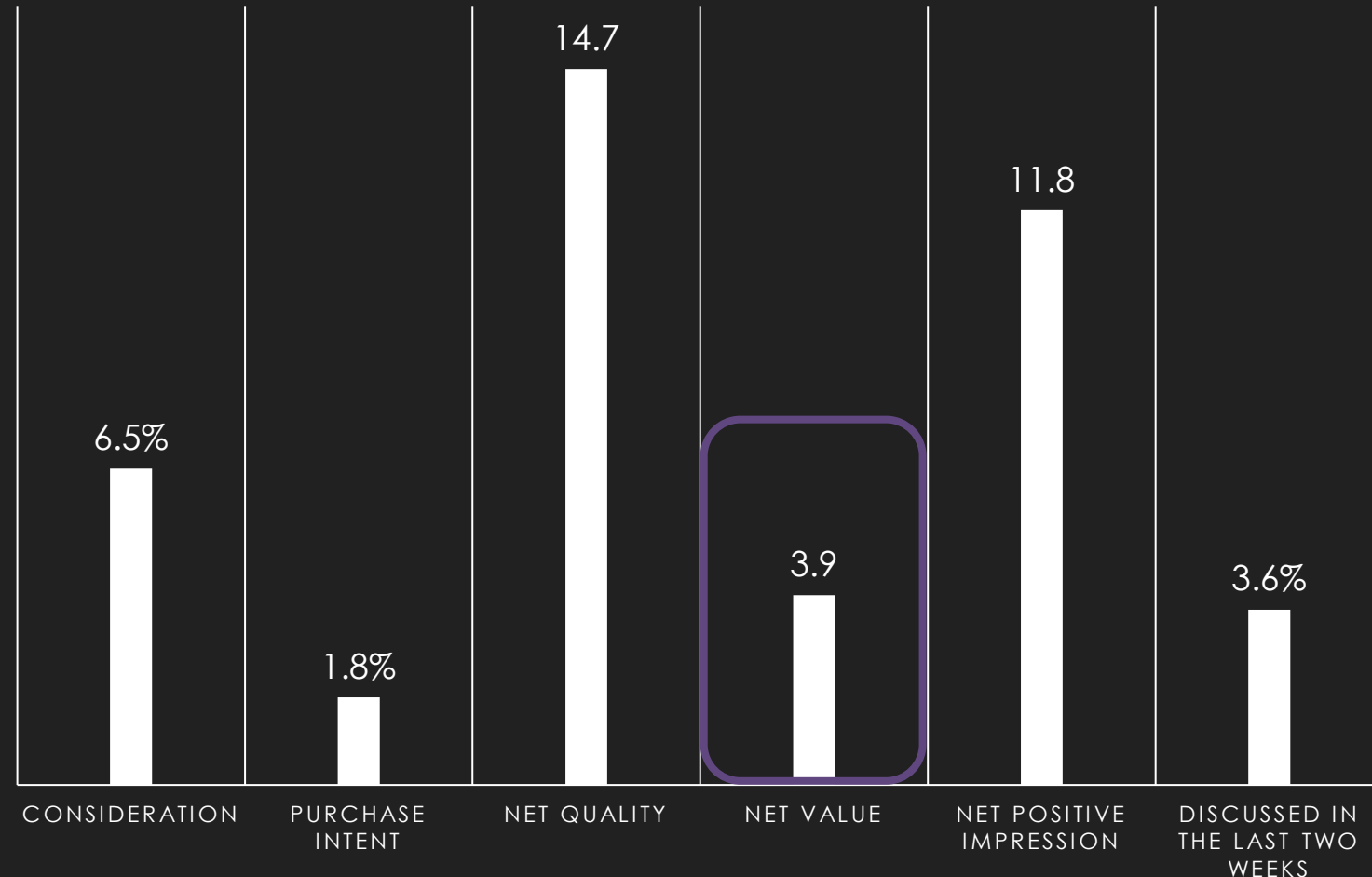
Consideration is more moderate for this category, and not surprisingly for a big ticket item, purchase intent is low.

CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	DISCUSSED IN THE LAST TWO WEEKS
9.3%	2.9%	18.1	7.1	15.6	6.5%

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Auto Category – Unaware

Among Unaware audiences, we see those same patterns but with lower scores across the board.

Perceptions of value were notably low and displayed substantial variance within the analysis period for a lot of brands.
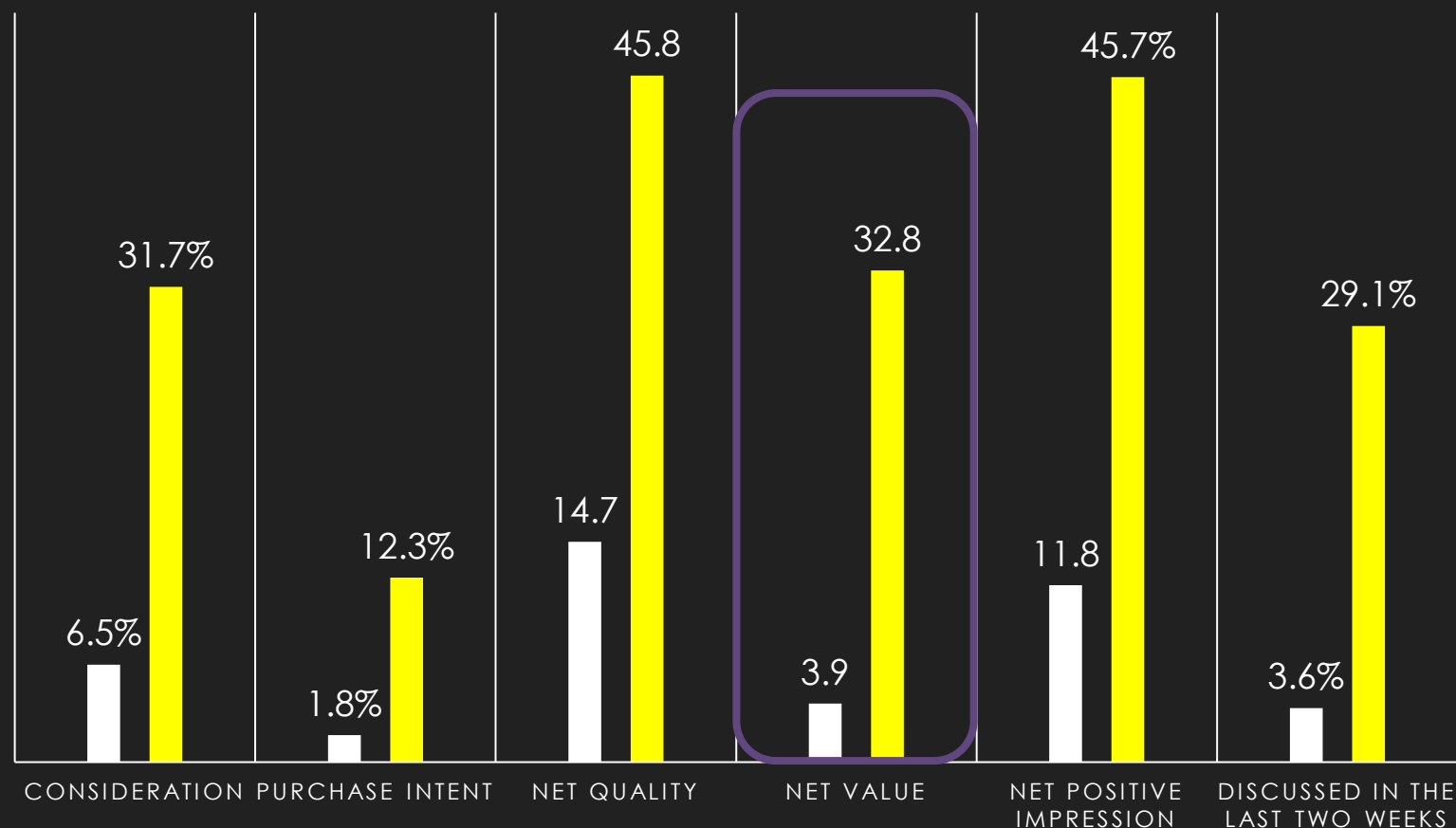
6.5%	1.8%	14.7	3.9	11.8	3.6%
CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	DISCUSSED IN THE LAST TWO WEEKS

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Auto Category – Unaware vs Aware

Like with the QSR category, scores in the Auto category show substantial increases with the Ad Aware audience compared to the Ad Unaware.

A wildly different category, and yet we see similar magnitudes of increases across these scores as well.

Again, repeating patterns in response to exposure.

■ Category Unaware   ■ Category Aware

CONSIDERATION: 6.5% / 31.7%
PURCHASE INTENT: 1.8% / 12.3%
NET QUALITY: 14.7 / 45.8
NET VALUE: 3.9 / 32.8
NET POSITIVE IMPRESSION: 11.8 / 45.7%
DISCUSSED IN THE LAST TWO WEEKS: 3.6% / 29.1%

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Brand scorecard – Brand A
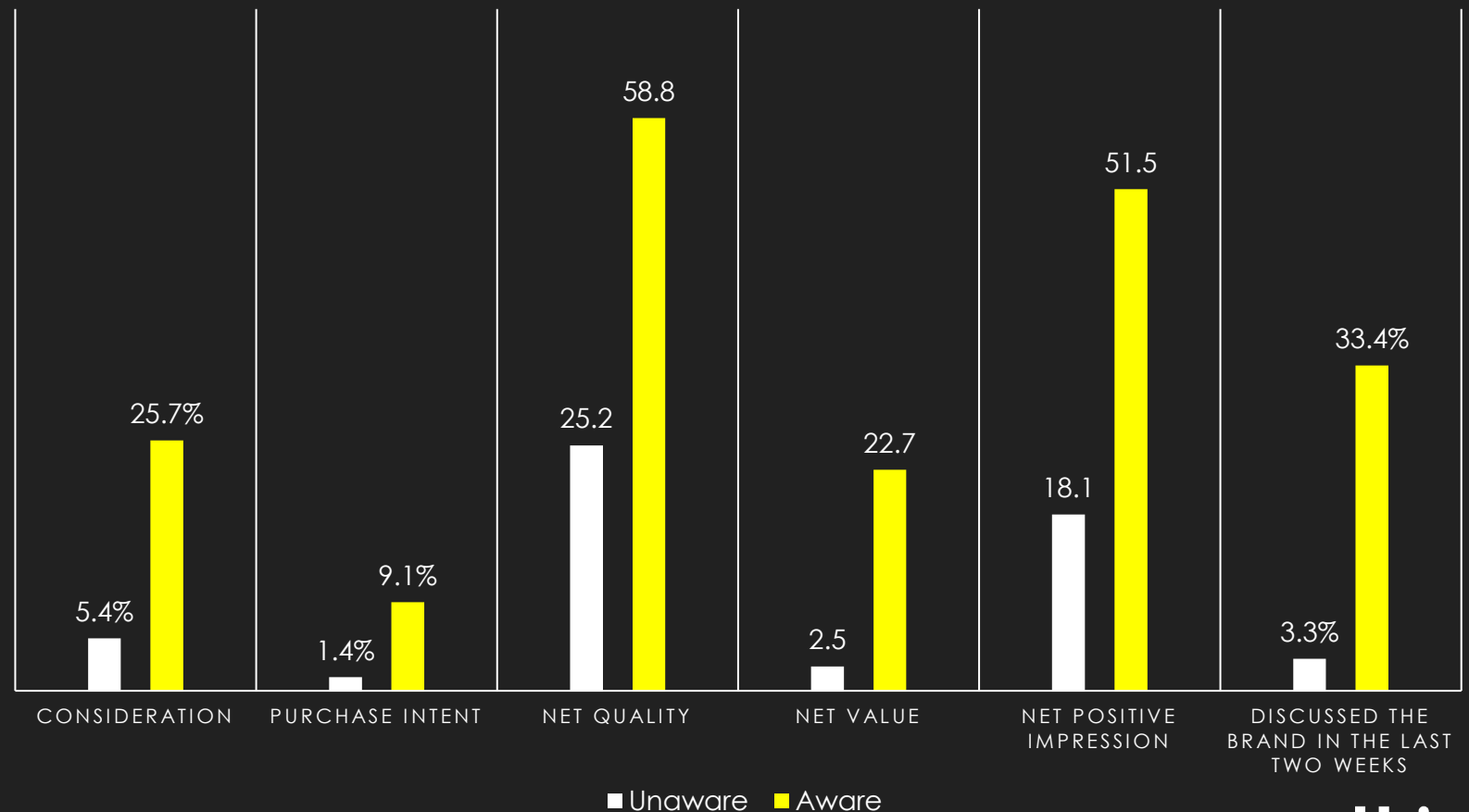
Sub-Category: Luxury Car

GRP levels: ~400

Campaign Length: 5 weeks

Ad Aware: 8.8%

Notes: Here we're looking at a more luxury brand within the auto category. A low number of GRPs and a short campaign overall.

This brand has very low baseline scores across attributes, but again we see substantial increases within the Ad Aware group.
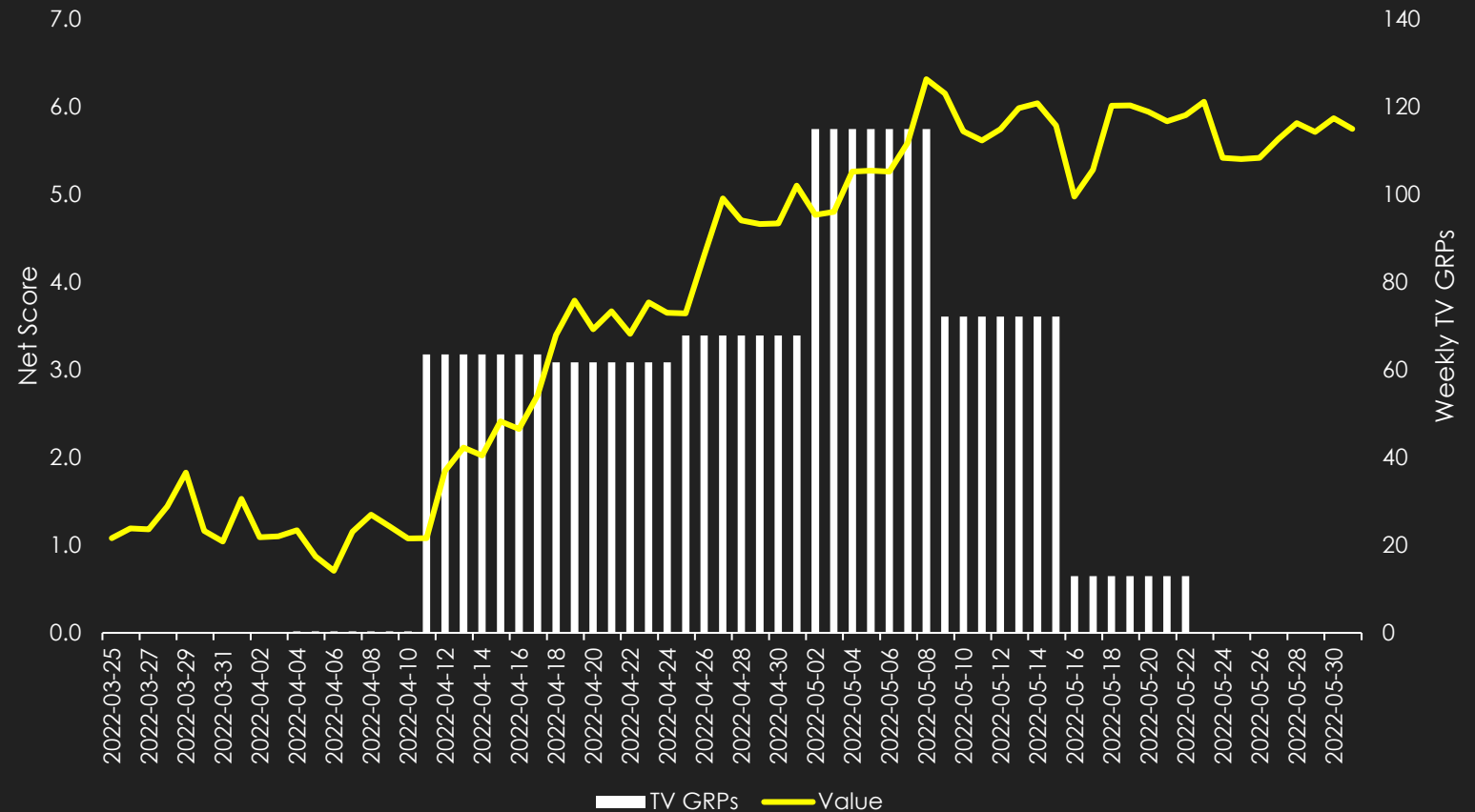

	CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	DISCUSSED THE BRAND IN THE LAST TWO WEEKS
Unaware	5.4%	1.4%	25.2	2.5	18.1	3.3%
Aware	25.7%	9.1%	58.8	22.7	51.5	33.4%

■ Unaware ■ Aware

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Brand A – Looking at Flights

This is an interesting example in that in this case, we have a shorter, burst campaign.

We can see perceptions of Value baselining very low and steadily increasing as soon as GRPs land on-air.

A very clear relationship that plateaus but continues after the end of the flight.

Auto Brand A: Total Pop – High Value

Net Score (left axis): 0.0, 1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 7.0

Weekly TV GRPs (right axis): 0, 20, 40, 60, 80, 100, 120, 140

X-axis: 2022-03-25 to 2022-05-30

Legend: TV GRPs | Value

Source: YouGov BrandIndex: Jan 2022 - May 2022, NLOGIC Active Brands Report

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Brand scorecard – Brand B
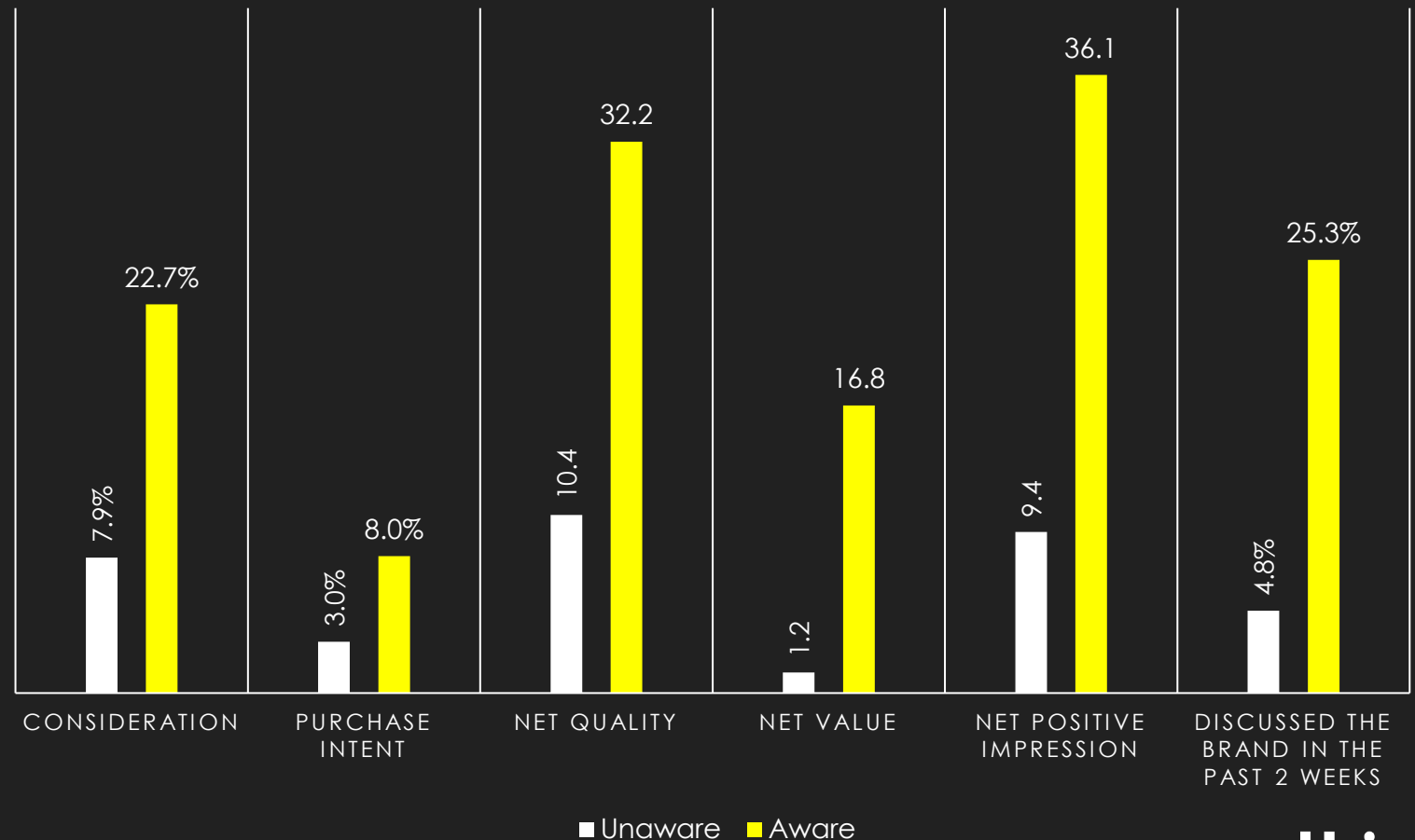
Sub-Category: Sports Utility Vehicles

GRP levels: ~835

Campaign Length: 10 weeks

Ad Aware: 19.1%

Notes: This brand shows a similar pattern to other brands we have looked at, with the notable exception of Value being the lowest score for Ad Unaware audiences.
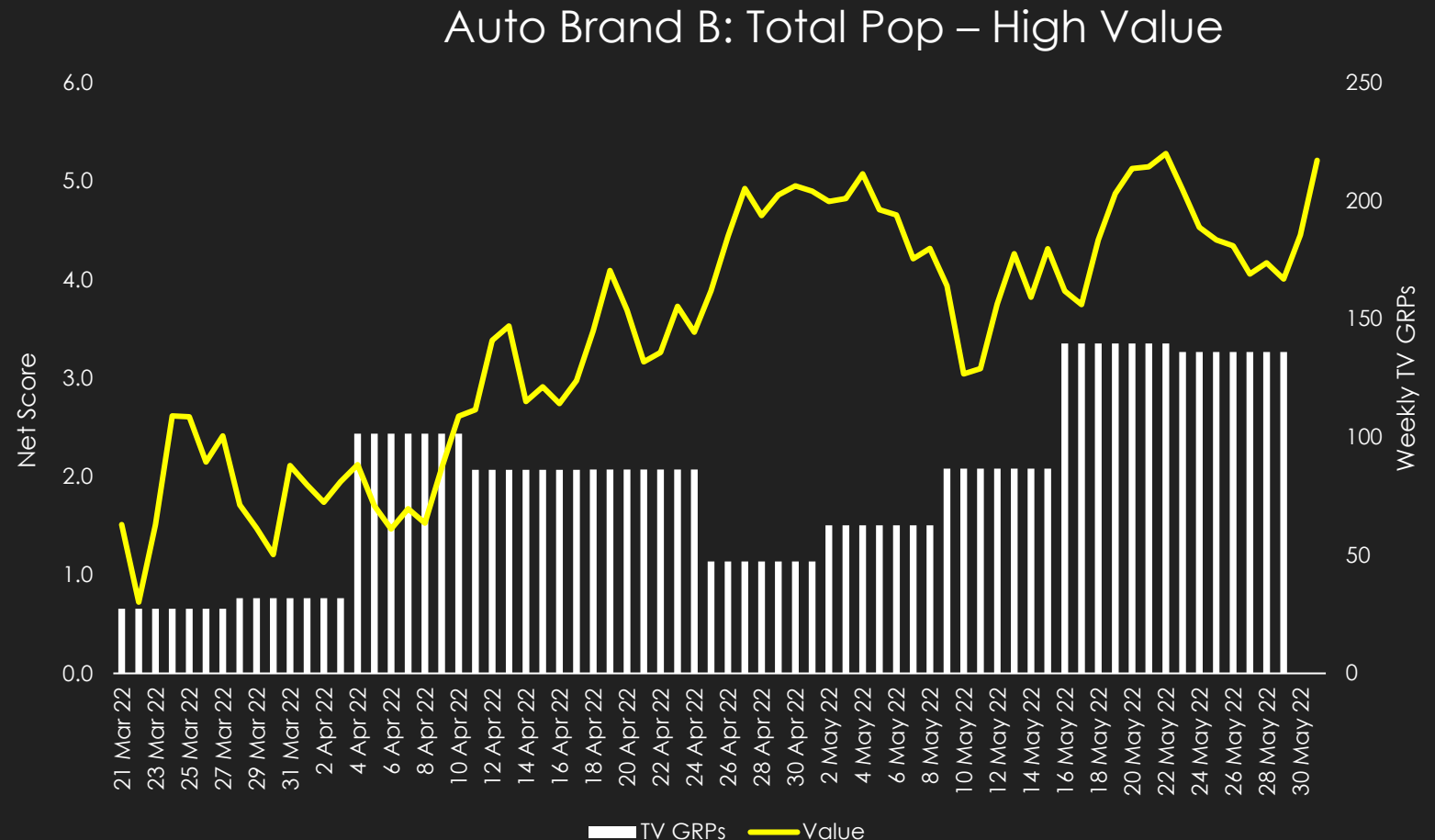
We see the same lift magnitude from Unaware to Aware audiences.

	Unaware	Aware
CONSIDERATION	7.9%	22.7%
PURCHASE INTENT	3.0%	8.0%
NET QUALITY	10.4	32.2
NET VALUE	1.2	16.8
NET POSITIVE IMPRESSION	9.4	36.1
DISCUSSED THE BRAND IN THE PAST 2 WEEKS	4.8%	25.3%

■ Unaware ■ Aware

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Brand B – Looking at Flights

Again, we see perceptions of Value starting very low for this brand, but they begin to increase as on-air weight levels gradually increase.

A slow increase over the duration of the flight, albeit with some day-by-day volatility.

Auto Brand B: Total Pop – High Value

Legend: ▮ TV GRPs ▬ Value

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Financial Category

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Financial:
A look at the category

Banking, Credit Cards, Investment, Insurance

- Over 26,000 GRPs Jan-May 2022

- Among On-Air brands, the average weekly GRPs was 71.83 / week

- Brands tended to be on-air for fewer weeks at a higher weight, but we do see some sustained high weight levels from certain brands

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Financial Category – Brand Attributes

Key Brand Attributes we looked at:

- Consideration
- Purchase Intent
- Quality
- Value
- Positive Impression
- WOM – Discussed the brand in the past 2 weeks

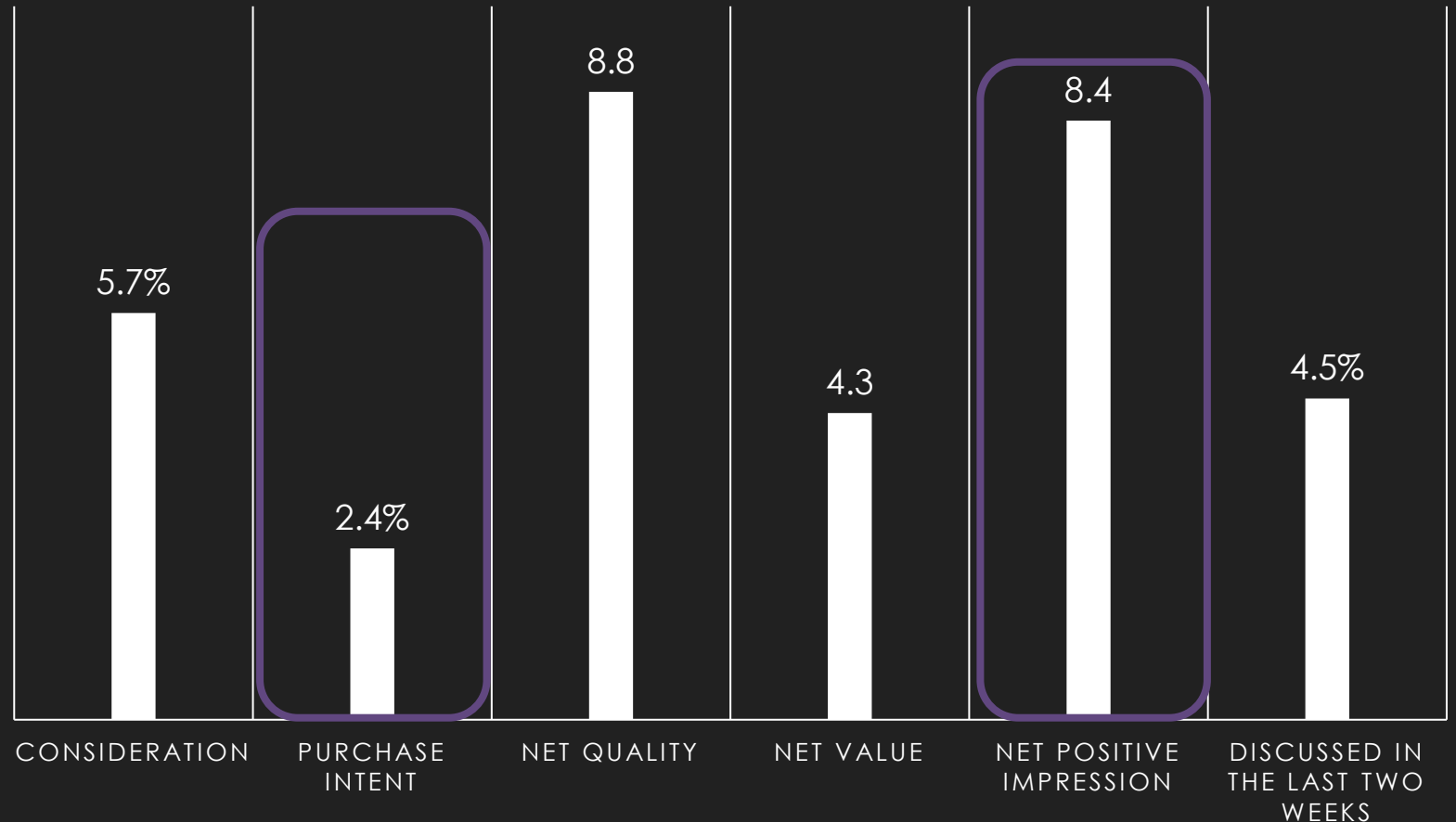- Financial Category scores are particularly fraught across these attributes

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Financial Category – Category Average

Moving to the Financial Category, we see some familiar dynamics between scores.
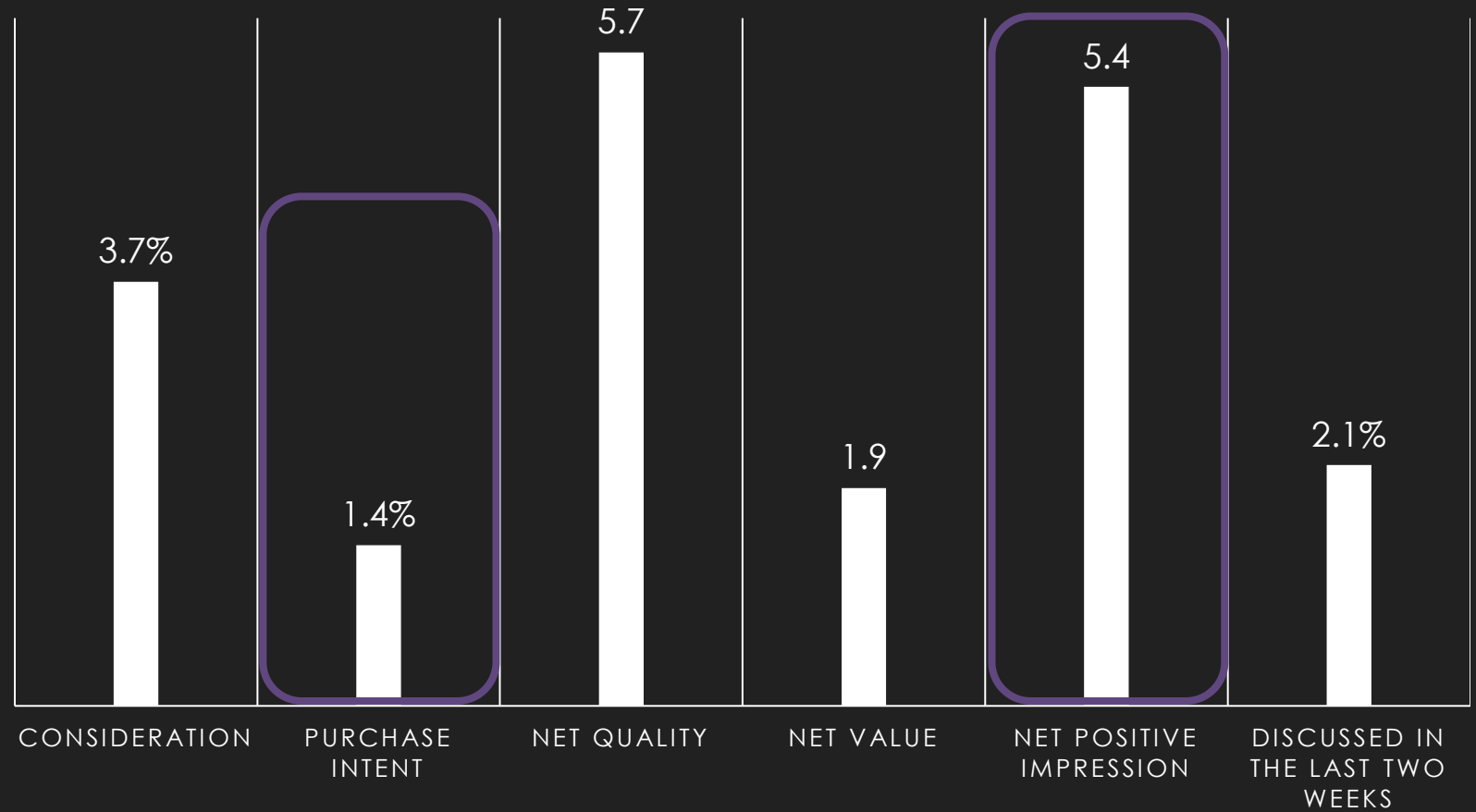
It's worth pointing out that in this category, averages scores across the board are quite low – although the ratio pattern is similar to what we've seen before.

5.7%
2.4%
8.8
4.3
8.4
4.5%

CONSIDERATION
PURCHASE INTENT
NET QUALITY
NET VALUE
NET POSITIVE IMPRESSION
DISCUSSED IN THE LAST TWO WEEKS

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Financial Category – Unaware

As expected, Ad Unaware audiences demonstrate those same relative pattern of scores across these brand metrics.

Even the highest scores are quite low and would have been worth watching for our other categories.

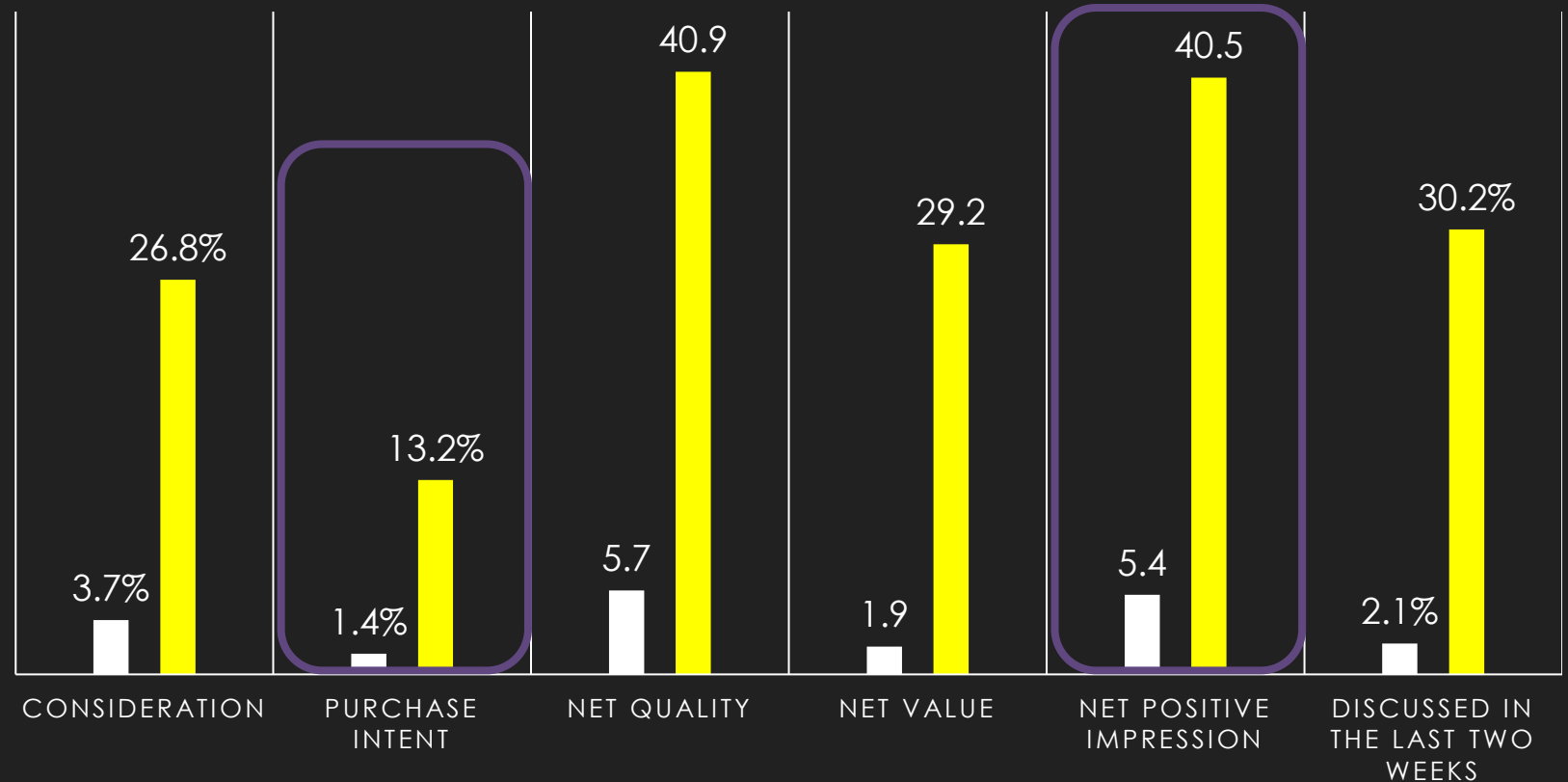| CONSIDERATION	PURCHASE INTENT	NET QUALITY	NET VALUE	NET POSITIVE IMPRESSION	DISCUSSED IN THE LAST TWO WEEKS
3.7%	1.4%	5.7	1.9	5.4	2.1%

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Financial Category – Unaware vs Aware

■ Category Unaware ■ Category Aware

As we have come to expect by this point, all scores show substantial increases for the Ad Aware audiences.

The magnitude of the increases is similar to other categories despite very low baseline scores.

This is showing us a substantial receptiveness of consumers to Financial advertising.

	Unaware	Aware
CONSIDERATION	3.7%	26.8%
PURCHASE INTENT	1.4%	13.2%
NET QUALITY	5.7	40.9
NET VALUE	1.9	29.2
NET POSITIVE IMPRESSION	5.4	40.5
DISCUSSED IN THE LAST TWO WEEKS	2.1%	30.2%

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Let's look at a few brands

Brand scorecard – Brand A
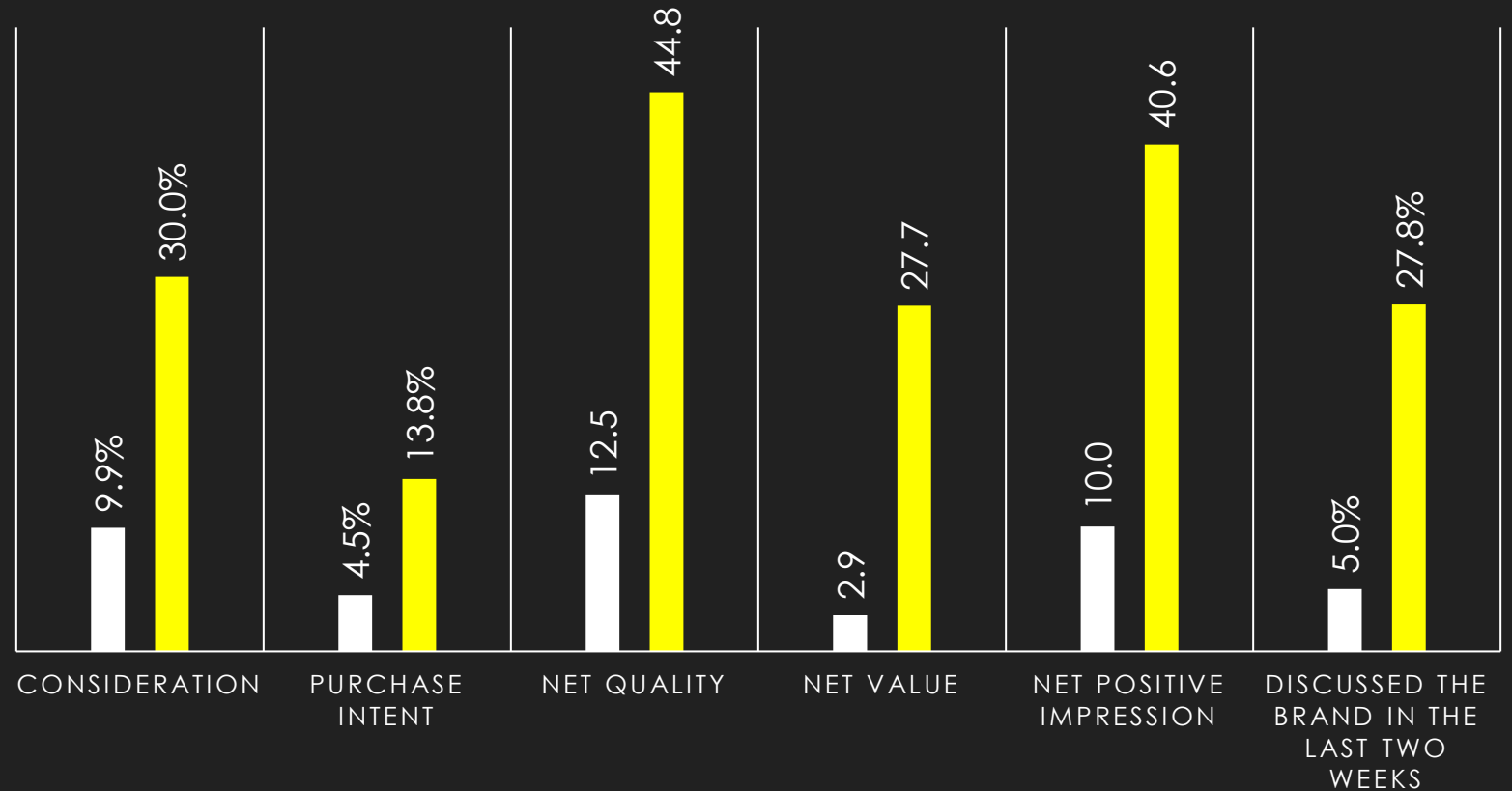
Sub-Category: Consumer Banking

GRP levels: ~800

Campaign Length: 6 weeks

Ad Aware: 23.1%

Notes: Here we see a brand with a higher level of GRPs within a short number of weeks, and a higher Ad Awareness % to match.

Baseline scores are better than the category average, and we see those substantial increases from Unaware to Aware audiences.
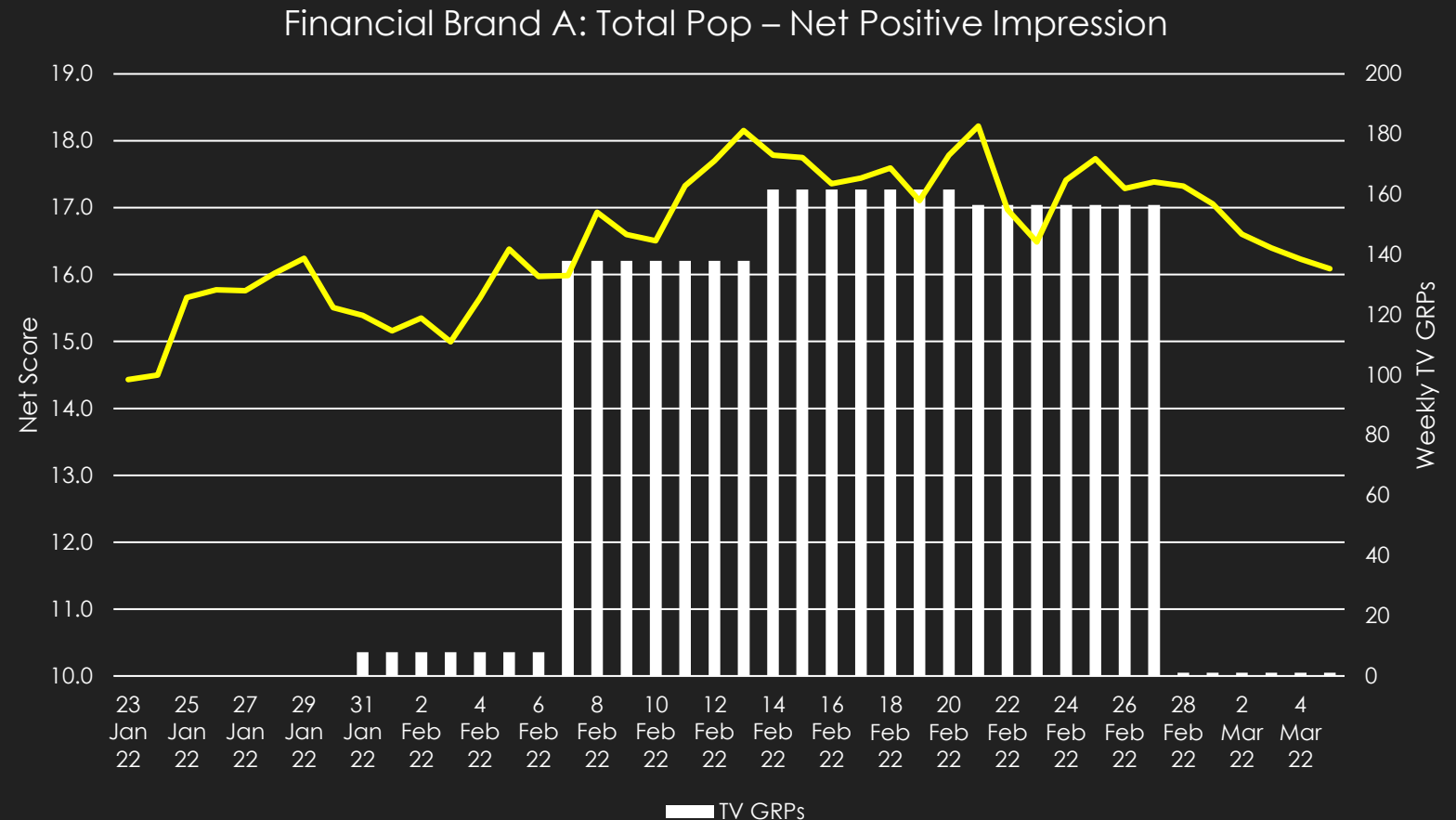

	Unaware	Aware
CONSIDERATION	9.9%	30.0%
PURCHASE INTENT	4.5%	13.8%
NET QUALITY	12.5	44.8
NET VALUE	2.9	27.7
NET POSITIVE IMPRESSION	10.0	40.6
DISCUSSED THE BRAND IN THE LAST TWO WEEKS	5.0%	27.8%

■ Unaware ■ Aware

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Brand A – Looking at Flights

Although not as dramatic as other categories, we see that same relationship between Positive Impression and on-air TV GRPs.

Within Financial, these scores have been traditionally harder to lift quickly, but we do see that same pattern of response.

Even within a short campaign, we see improvements in the Impression of this brand.

Financial Brand A: Total Pop – Net Positive Impression

Net Score (left axis): 10.0, 11.0, 12.0, 13.0, 14.0, 15.0, 16.0, 17.0, 18.0, 19.0

Weekly TV GRPs (right axis): 0, 20, 40, 60, 80, 100, 120, 140, 160, 180, 200

X-axis: 23 Jan 22, 25 Jan 22, 27 Jan 22, 29 Jan 22, 31 Jan 22, 2 Feb 22, 4 Feb 22, 6 Feb 22, 8 Feb 22, 10 Feb 22, 12 Feb 22, 14 Feb 22, 16 Feb 22, 18 Feb 22, 20 Feb 22, 22 Feb 22, 24 Feb 22, 26 Feb 22, 28 Feb 22, 2 Mar 22, 4 Mar 22

Legend: TV GRPs

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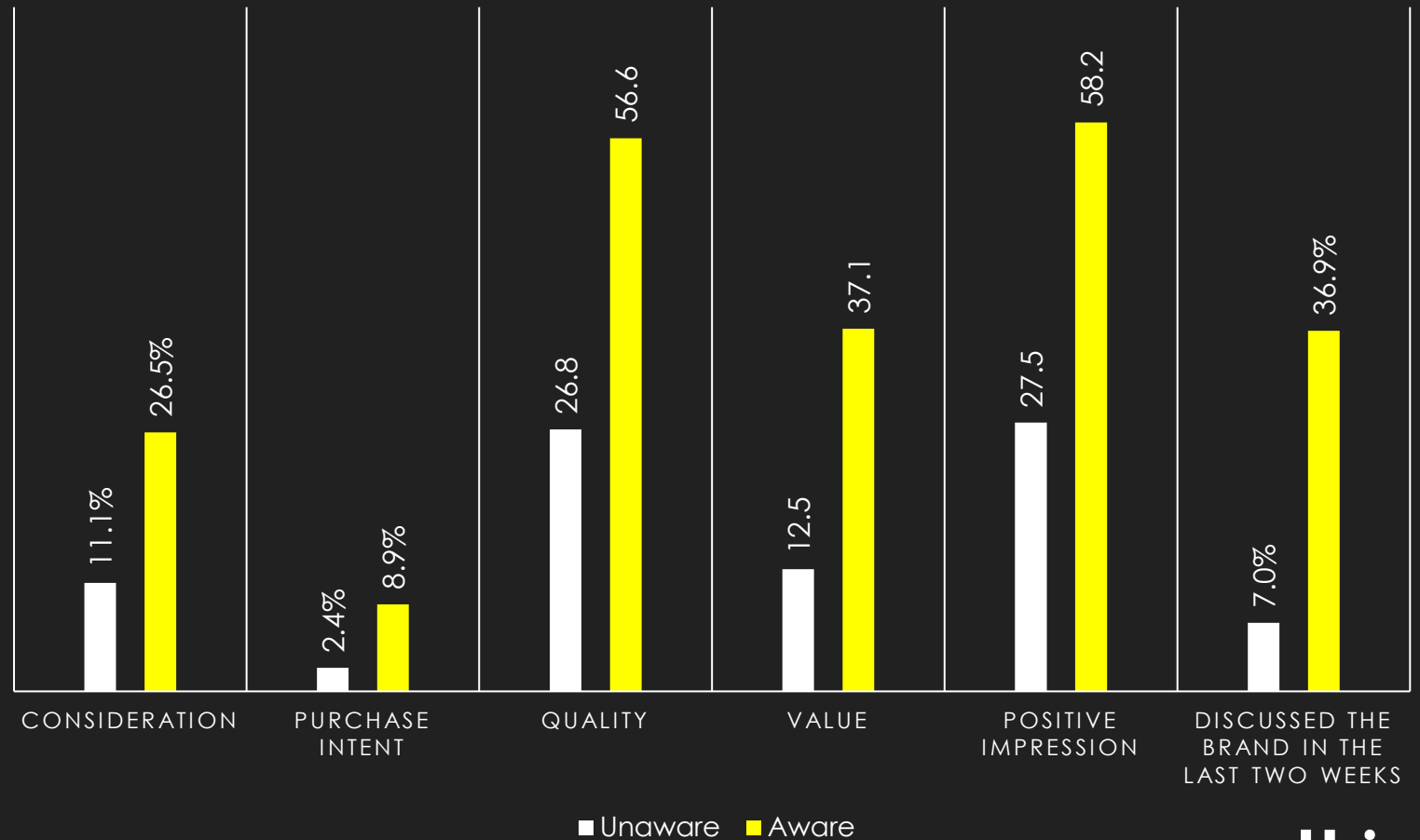# Brand scorecard – Brand B

Sub-Category: Credit Card

GRP levels: ~1300

Campaign Length: 9 weeks

Ad Aware: 22.0%

Notes: Similar to our other Financial brand example, we see solid GRP levels within a relatively small number of weeks, and Ad Aware scores that improve accordingly.

This brand has notably high base scores in Quality and Impression.

	Unaware	Aware
CONSIDERATION	11.1%	26.5%
PURCHASE INTENT	2.4%	8.9%
QUALITY	26.8	56.6
VALUE	12.5	37.1
POSITIVE IMPRESSION	27.5	58.2
DISCUSSED THE BRAND IN THE LAST TWO WEEKS	7.0%	36.9%

■ Unaware ■ Aware

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Brand B – Looking at Flights

Purchase or Acquisition Intent is a challenging but also critical metric for Financial brands.

Again, although not as dramatic as our other categories, we can see Purchase Intent rising over the course of the campaign and falling once TV weight is off-air.
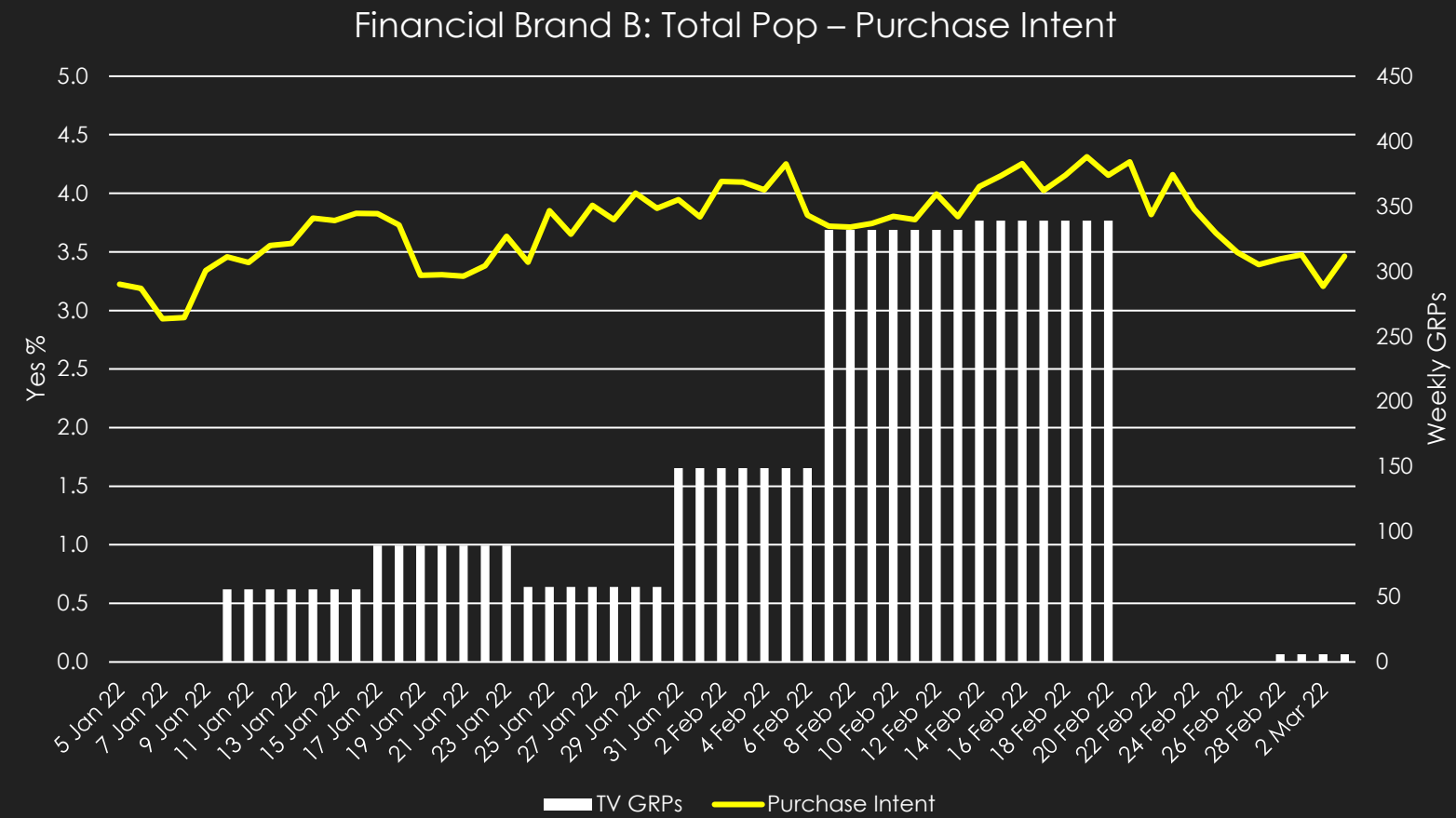
Financial Brand B: Total Pop – Purchase Intent

Legend: TV GRPs | Purchase Intent

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Other Categories

○ We analyzed a number of other categories – notably heavily online brands like food delivery apps, web services, and Google – and found the same lift patterns

○ These categories demonstrated some of the heaviest weekly weight levels, pushing 300+ GRPs in single weeks

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Category Take Aways

- QSR – TV advertising drove 8x self-reported consumption among Ad Aware audiences compared to Unaware audiences. We also observed an 8x lift in Purchase Intent, despite it being notoriously hard to move in this category.

- Automotive – Despite Automotive being a category with brand scores in decline, TV advertising drove substantial lift across key attributes. Perceptions of Brand Value, highly embattled in this category, saw 8x increases among Ad Aware vs Unaware.

- Financial – Compared to other categories, Financial scores were generally low across brands. Established brands saw significant increases across key metrics like Purchase Intent (9x) and Positive Impression (7x) among Ad Aware vs Unaware audiences.

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Some Other Take Aways

- TV exposure drove strong results across key brand metrics

- This remained true across varied categories / investment levels / flighting styles

- Audience/Consumer perception lifts started almost immediately

- Reach is important – exposed audiences saw significant lift; heavier investment increased exposure numbers

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