

The Awareness Effect

How ad awareness unlocks everything else

Nic Pietersma, Ebiquity

Jane Christian, WPP Media

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We *used* to care about

Advertising Awareness

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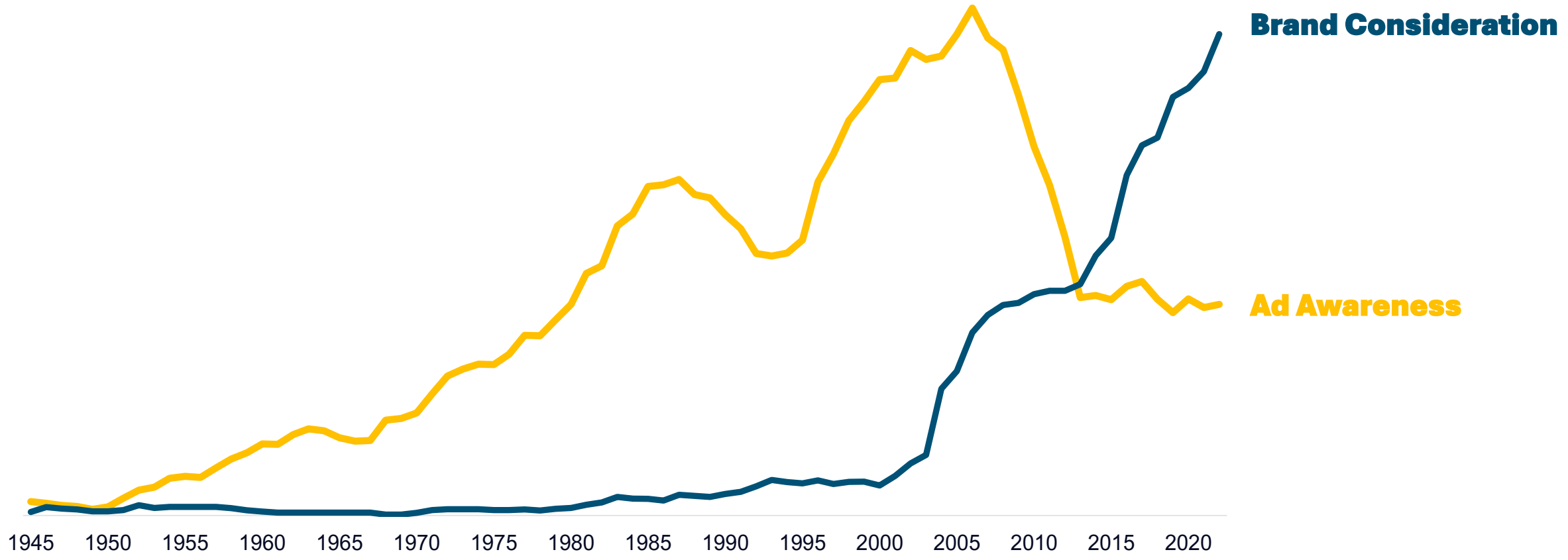


Getting **noticed and remembered** has always been the point of advertising

Source: ‘The Town Crier’ (1867) by Charles Green

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A brief history of Ad Awareness



Source: Google N-Gram Including terms “ad awareness”, “advertising awareness”, “ad recall” and “day after recall”.

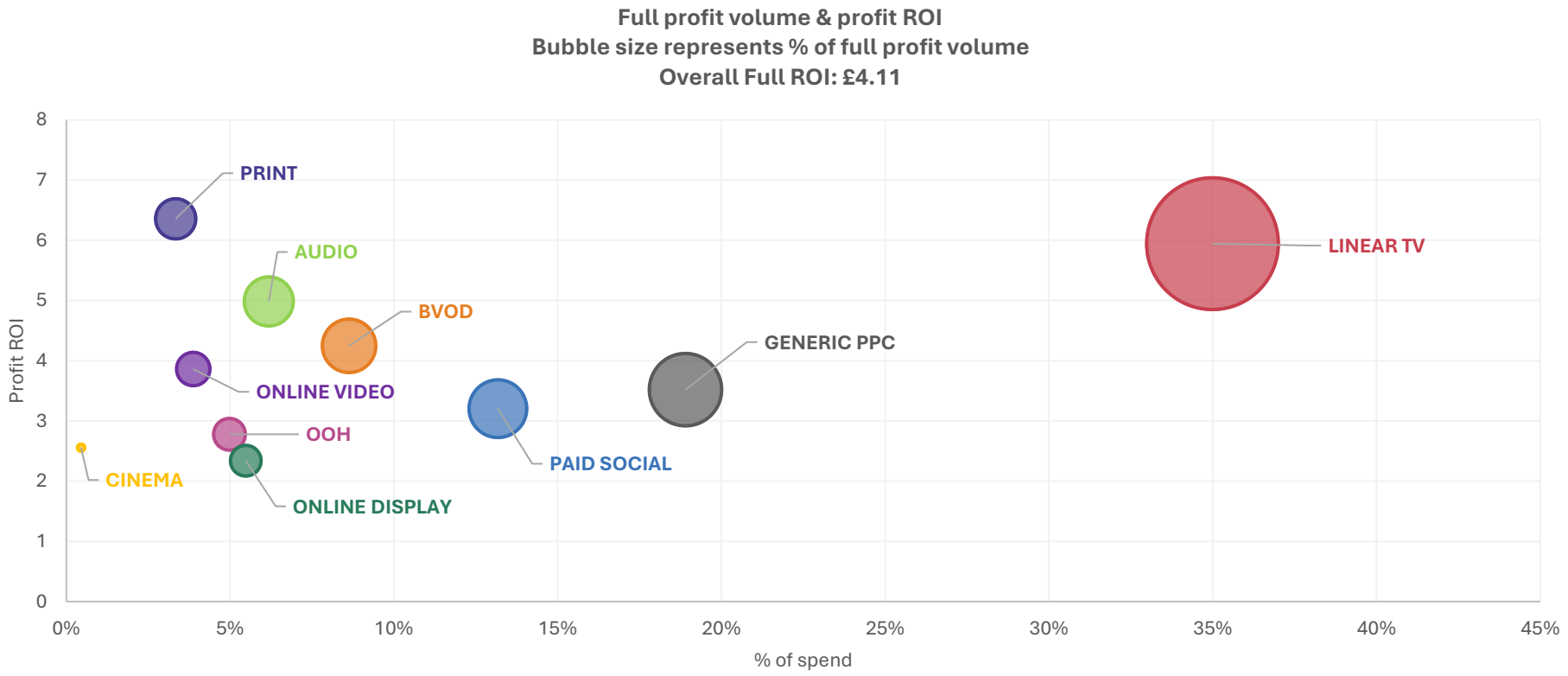
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We should *still* care about

Advertising Awareness

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It is well established that advertising drives profitable ROI (x£4.11), not only in the short-term but also in the long-term



Timeframes for ROI Development

58%
Sustained ROI via Brand Effects most often modelled via
CONSIDERATION

18%
Carryover

24%
Immediate

All Channels

Source: Profit Ability 2 – Ebiquity, Gain Theory, WPP Media

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But consideration moves too **slowly & subtly** for modern business, with most brands moving less than 1% per year

Source: YouGov BrandIndex

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So, we need a proxy to bridge the gap between fast media signals & long-term brand equity



Is predictive of long-term brand outcomes



Moves quickly & measurably after ad exposure



Scores media planning & creative excellence

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Ad Awareness is an excellent success proxy because it depends on three **necessary**, but individually insufficient conditions...

Cost effective reach

Attention

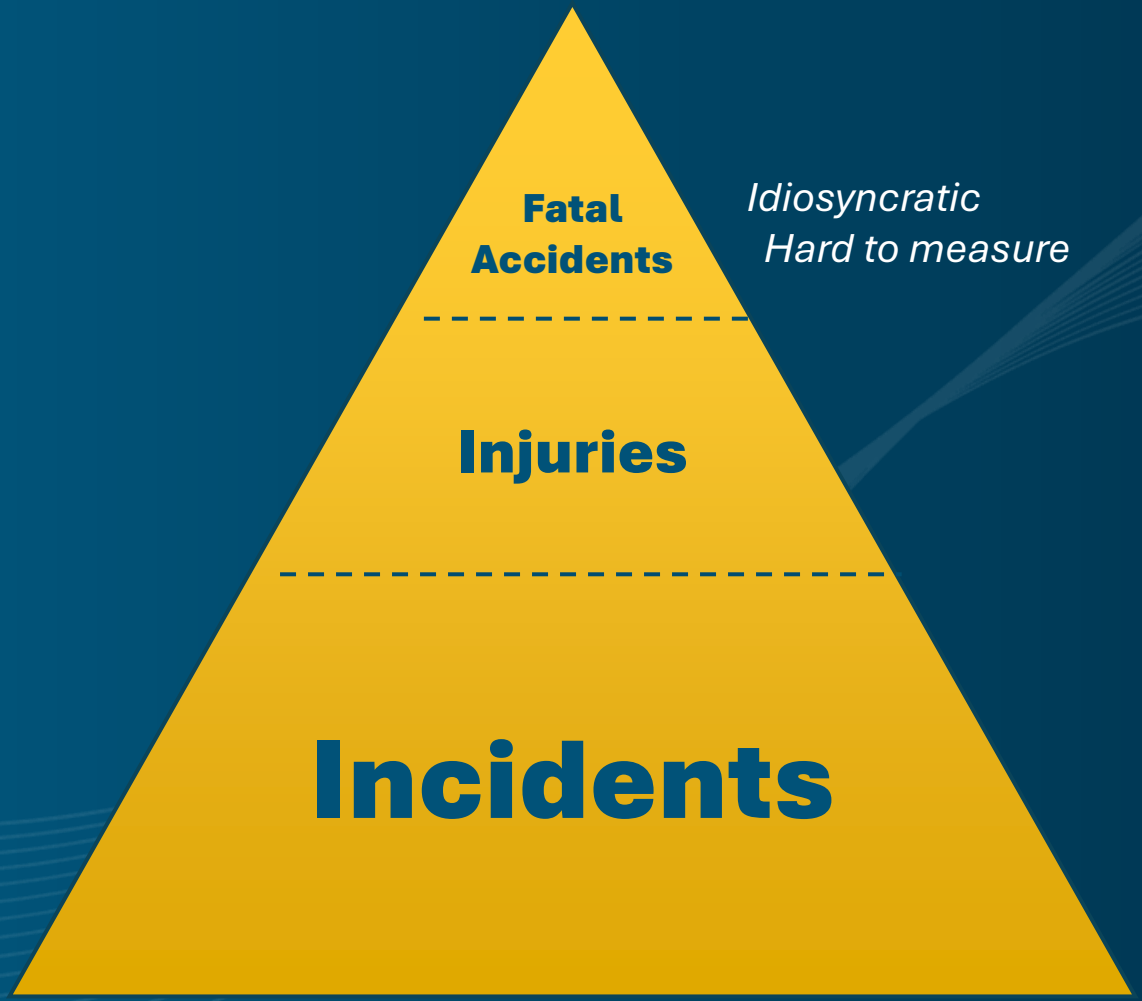
Creative impact

Measurability Matters



Frank E. Bird Jr

1921–2007



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Ad Awareness

The critical gate to both short and long-term growth

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The Awareness Effect

How ad awareness unlocks everything else

The Evidence

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To build the most general case for Ad Awareness, we turned to YouGov BrandIndex which does whole-of-market coverage

YouGov® BrandIndex

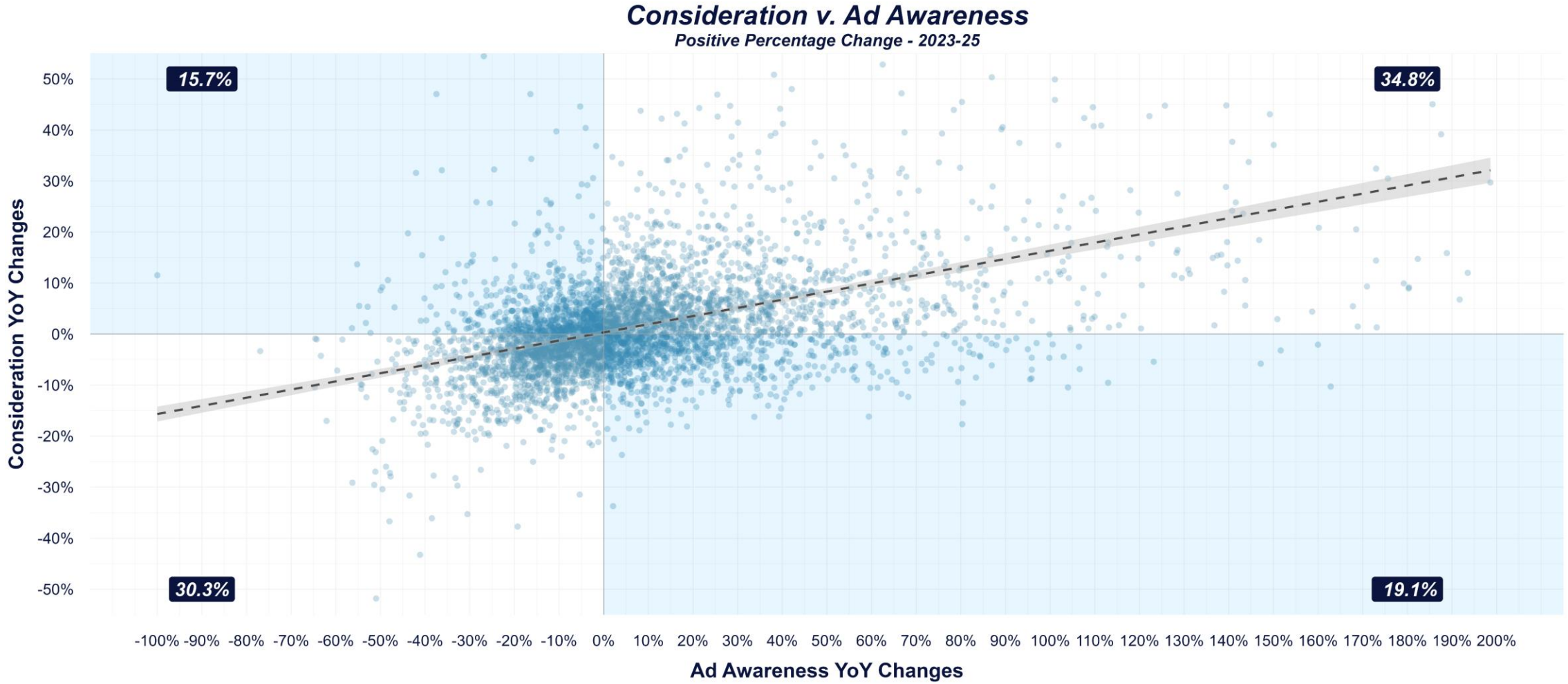
1478

BRANDS

January 2022 to March 2026 (4 yrs 3mo)

Source: YouGov BrandIndex excluding the country destination index, various sports brands, computer games and shorter sample brands. Sample was divided into 128 sectors for analysis. Each model included over 300k observations of weekly data.
Seven metrics were evaluates including Consideration, Positive Quality, Negative Quality, Positive Value, Negative Value, Positive Reputation, Negative Reputation

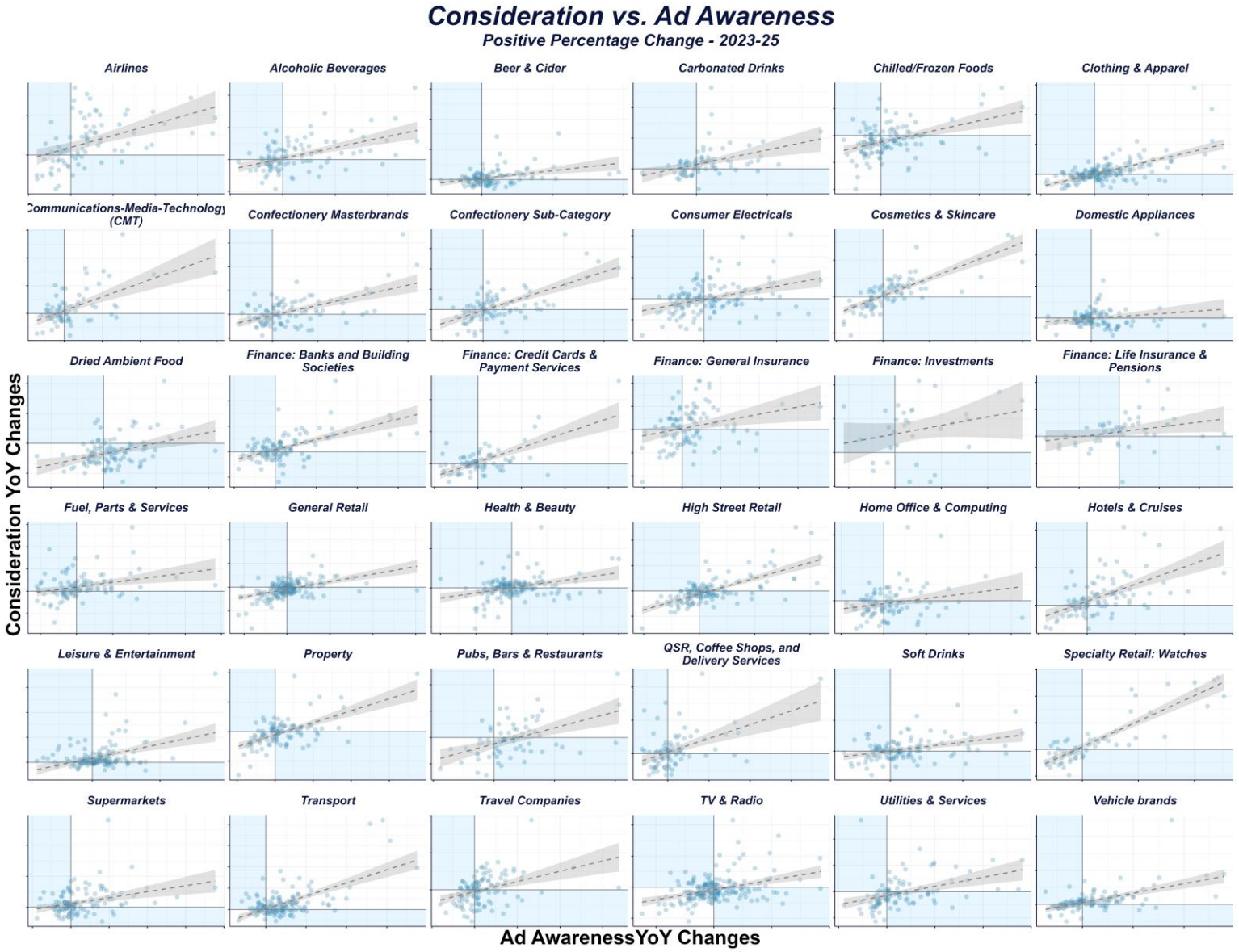
Prima facie evidence suggests Consideration rises with Ad Awareness



Source: YouGov BrandIndex, showing YoY change for 2022-2023, 2023-2024, 2024-2025

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A remarkably consistent relationship across categories



Source: YouGov BrandIndex

To build the most general model linking Ad Awareness and Consideration, we looked at five YouGov Brand Index metrics

Ad Awareness

Which of the following brands have you seen an advertisement for in the past two weeks?

Value

Which of the following brands do you think represent good/poor value for money?

Quality

Which of the following brands do you think represent good/poor quality?

Reputation

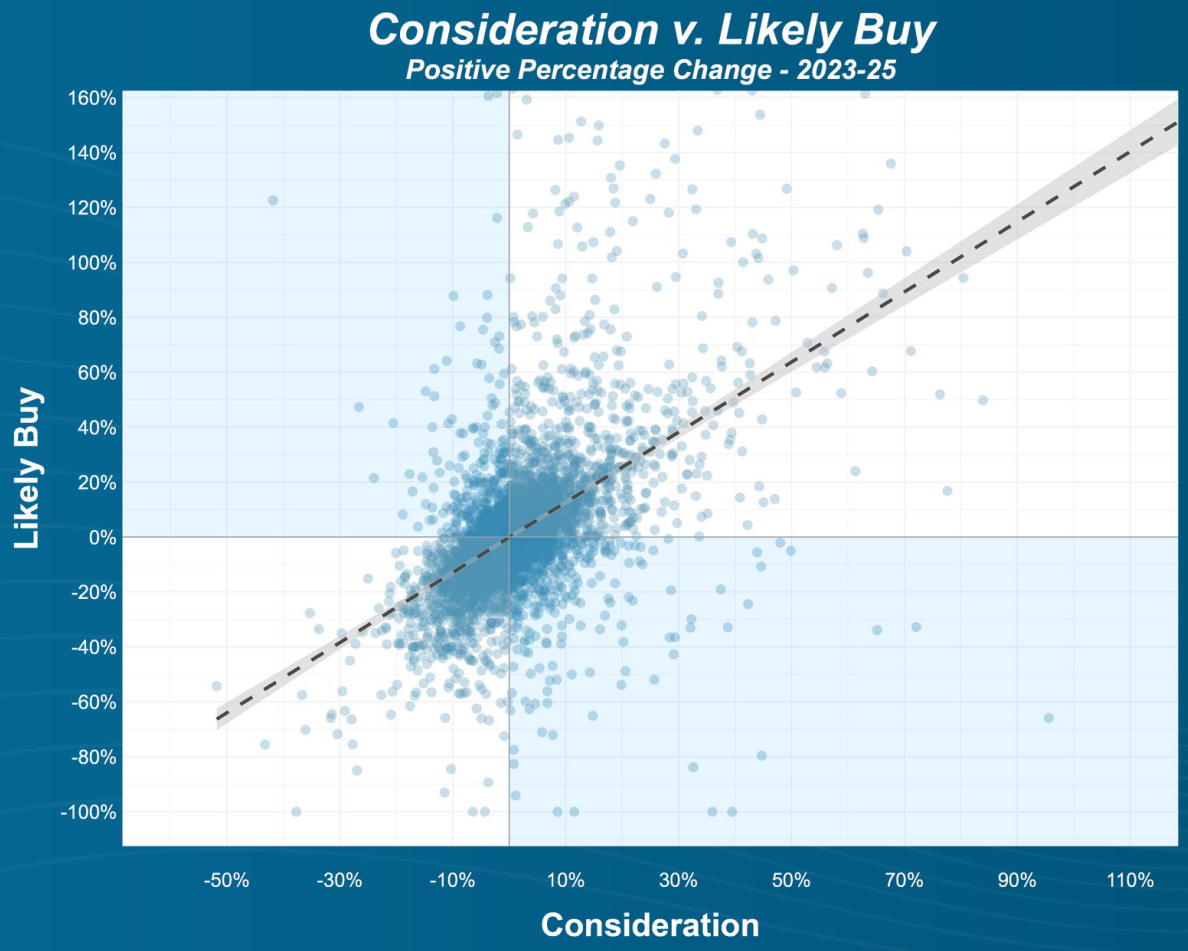
Would you be proud/embarrassed to work for any of the following brands?

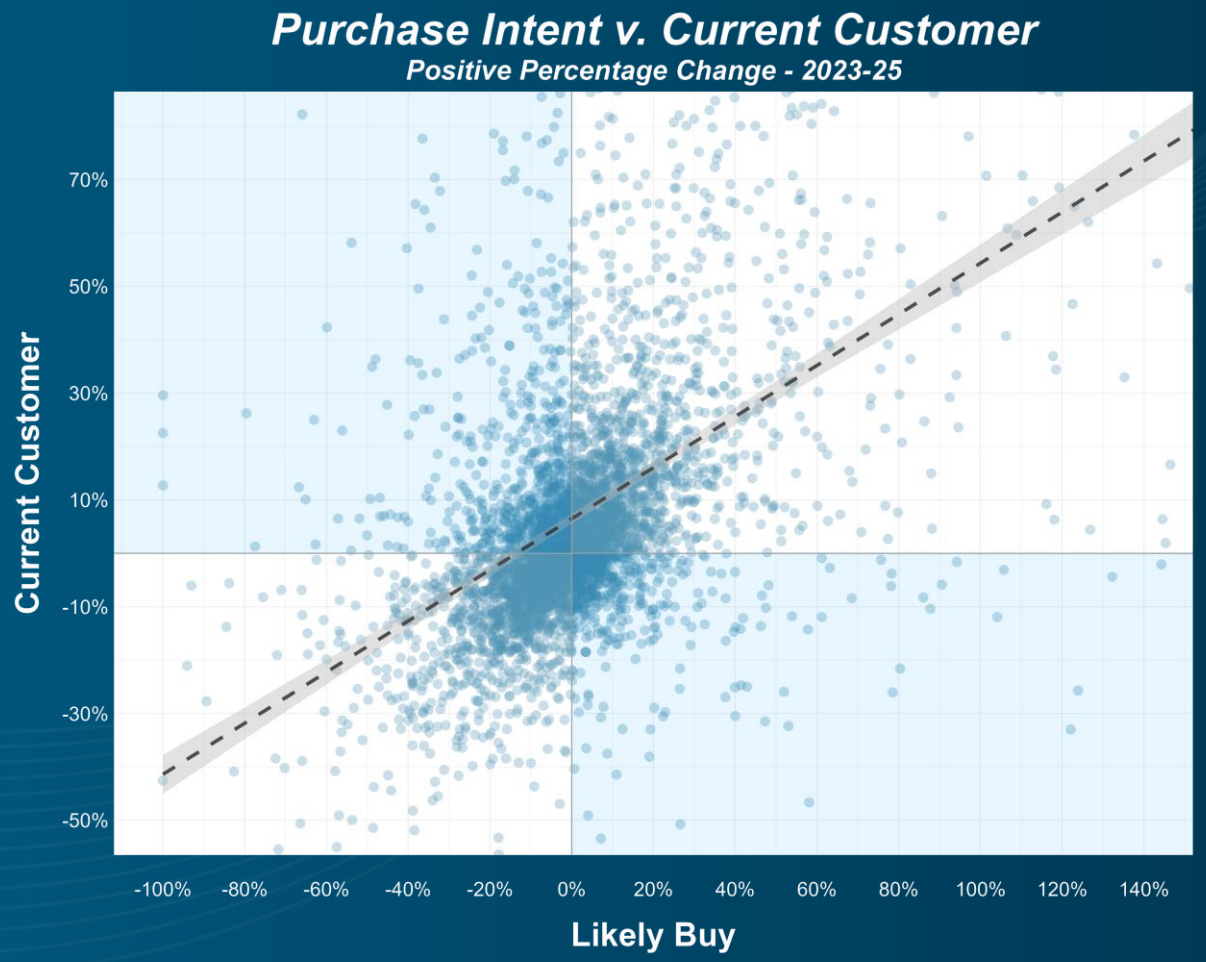
Consideration

When you are next in the market to purchase x, which of the following brands would you consider buying?

Source: YouGov BrandIndex

Consideration >> Purchase Intent >> Current Customer out of scope for today



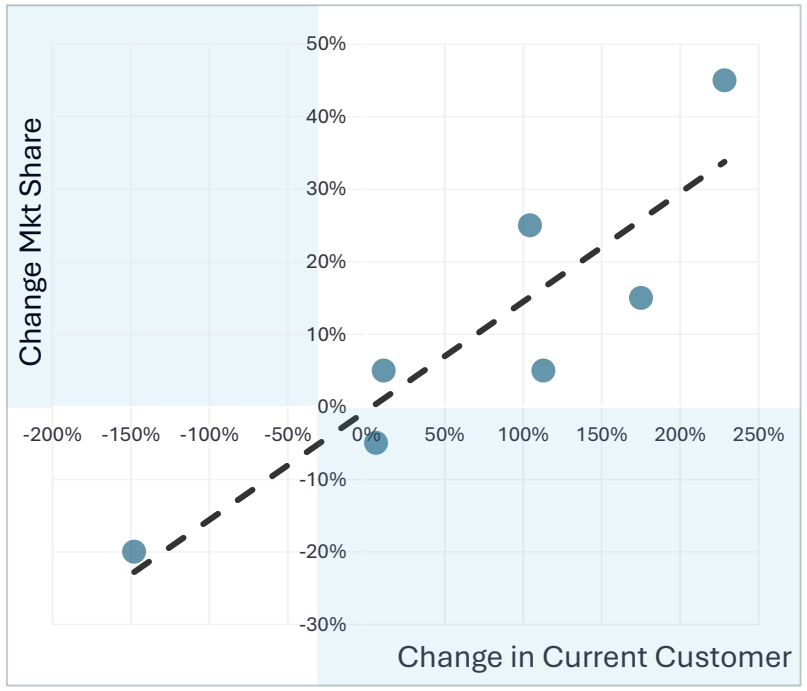


Source: YouGov BrandIndex

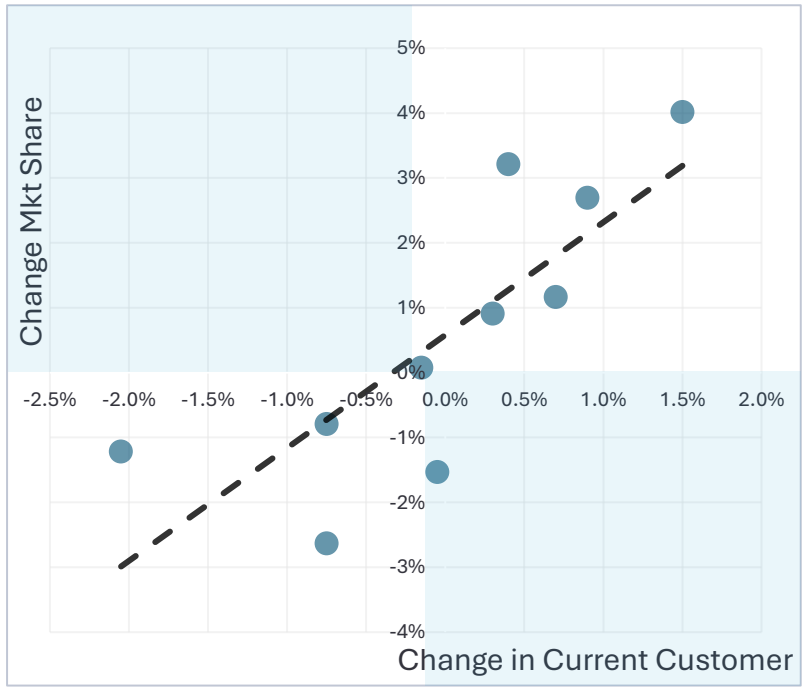
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Similarly, change in ‘Current Customer’ can be linked to change in market outcomes outside the YouGov dataset, but is taken as given

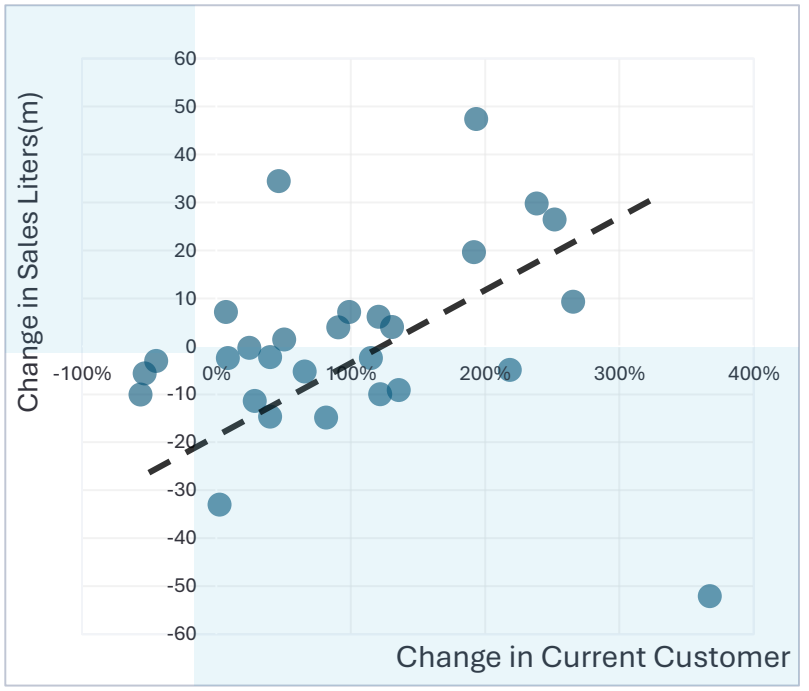
Quick Service Restaurants (QSR)



Supermarkets

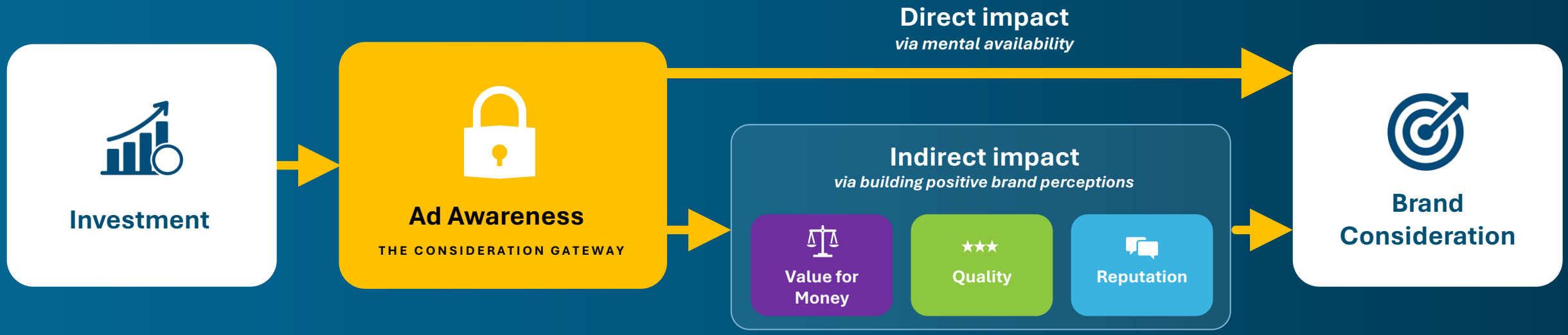


Soft Drinks



Source: YouGov BrandIndex (Current Customer), Euromonitor International Limited, RSP value (QSRs & Soft Drinks), Worldpanel by Numerator (Supermarkets)
Note: Showing change in share 2024/25 vs 2022/23

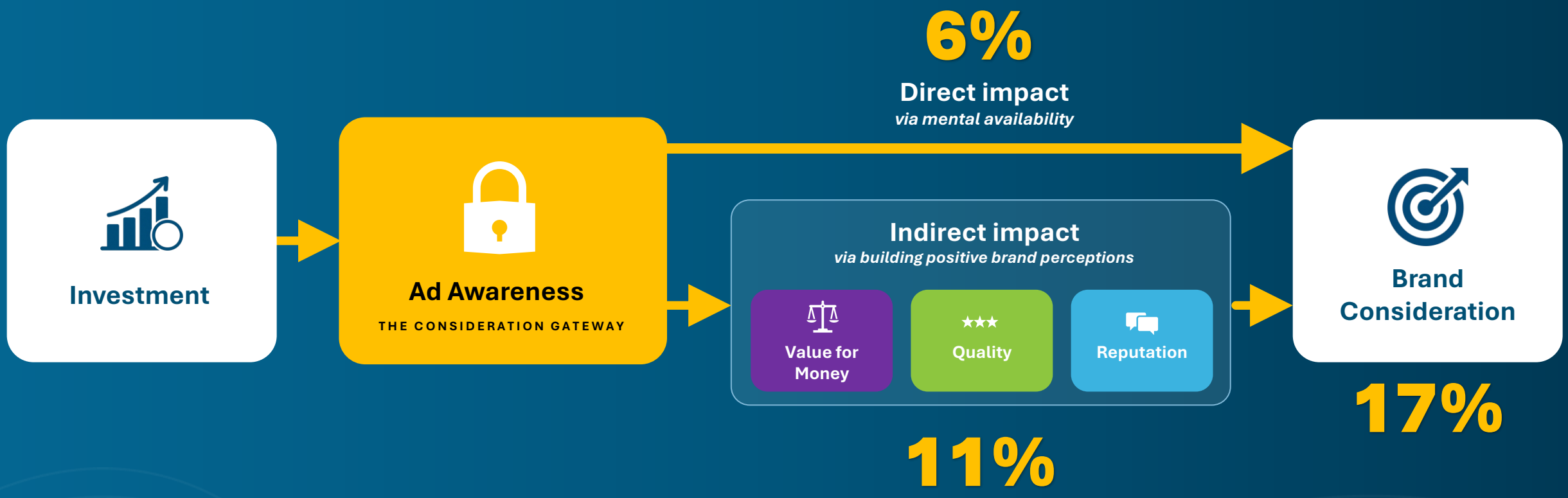
The Framework: *Ad Awareness* is the critical gate to consideration



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

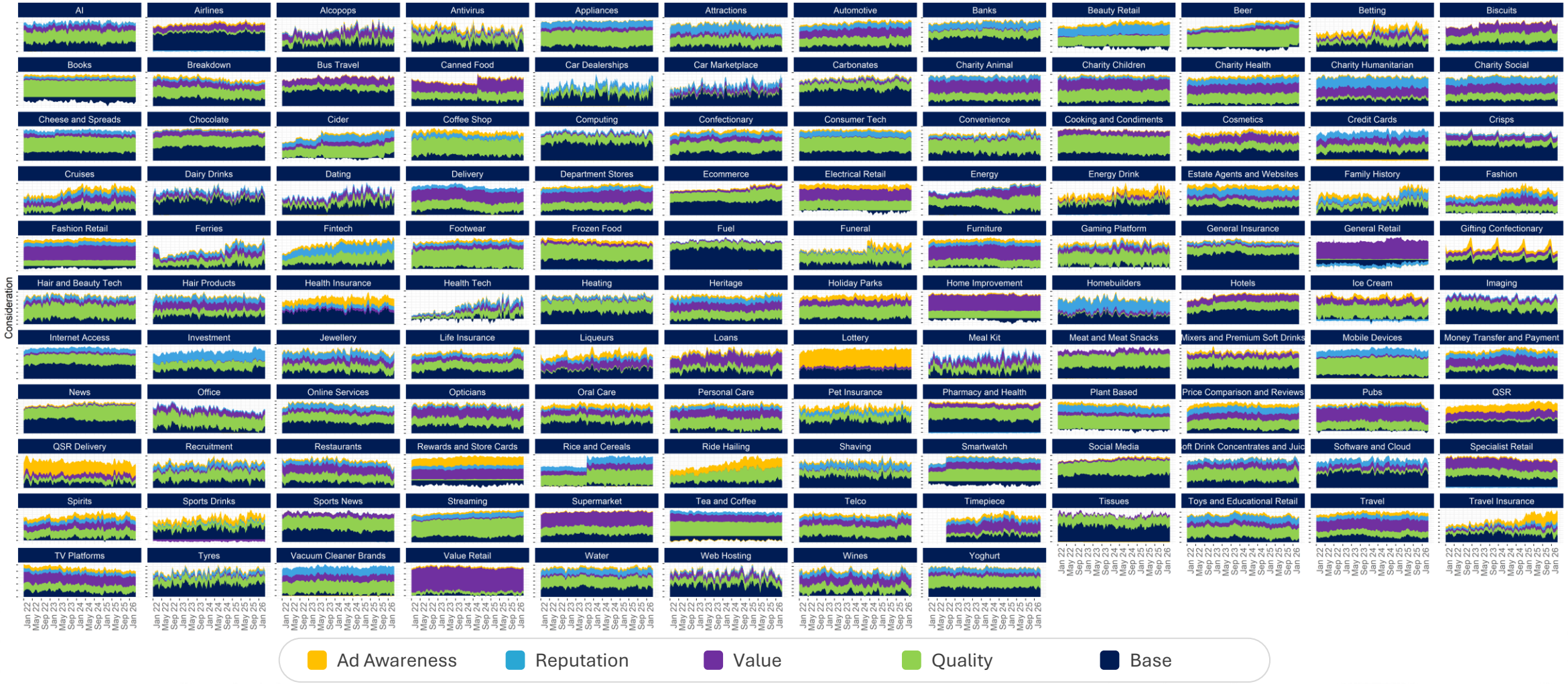
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Our 17% headline findings consist of a 6% direct contribution to Consideration and a further 11% via intermediate metrics



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

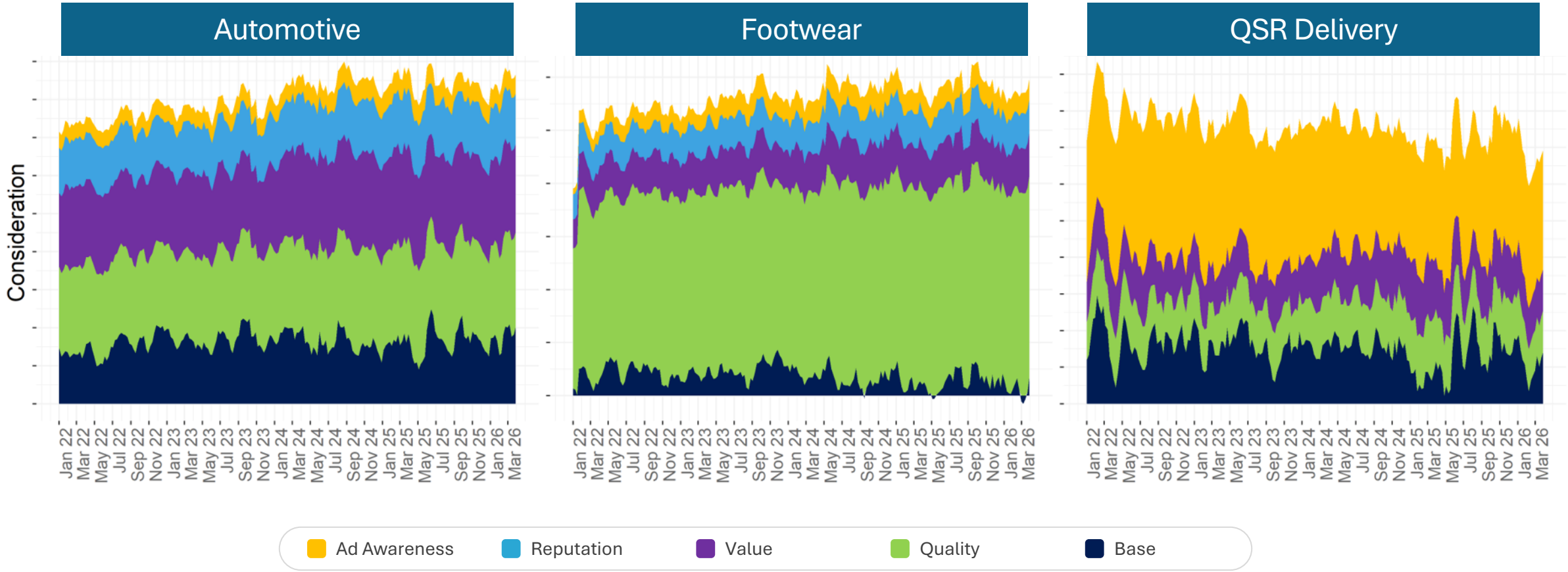
The DNA of Brand Consideration



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

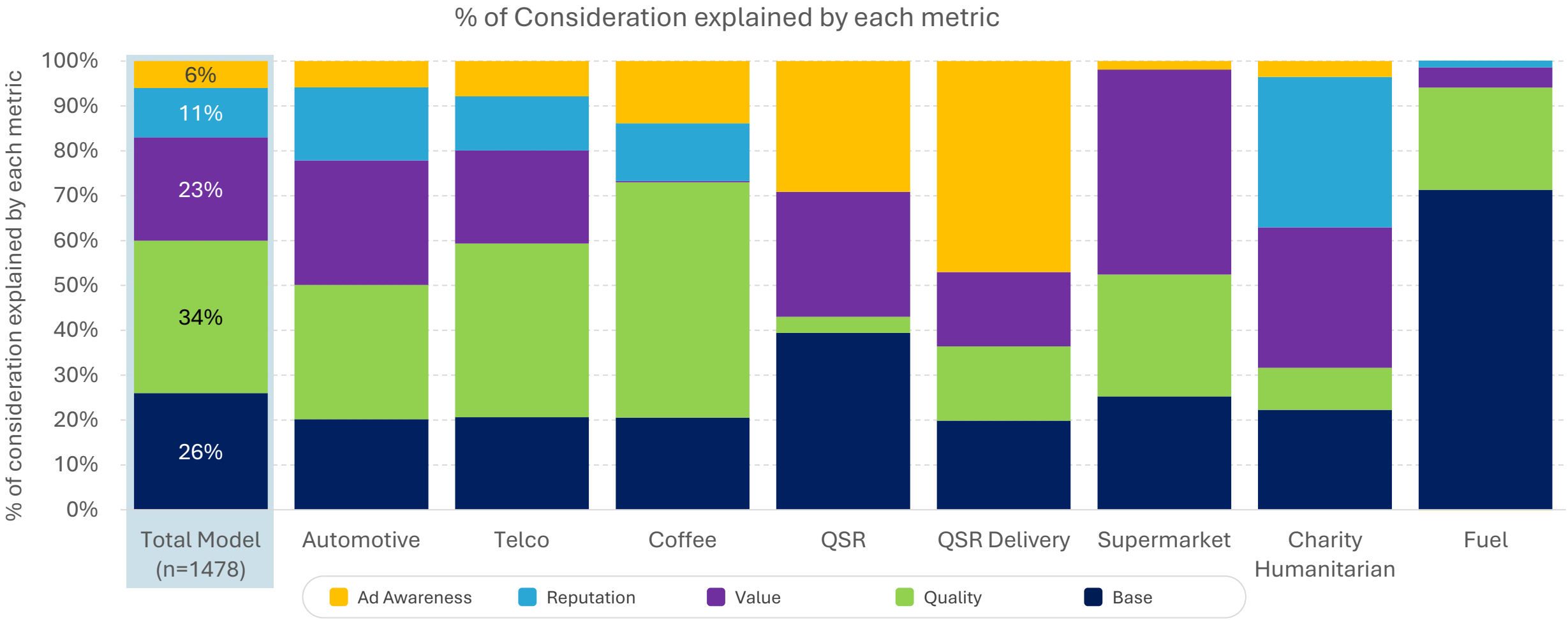
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Zooming in - there is significant variation in “levers” across sectors



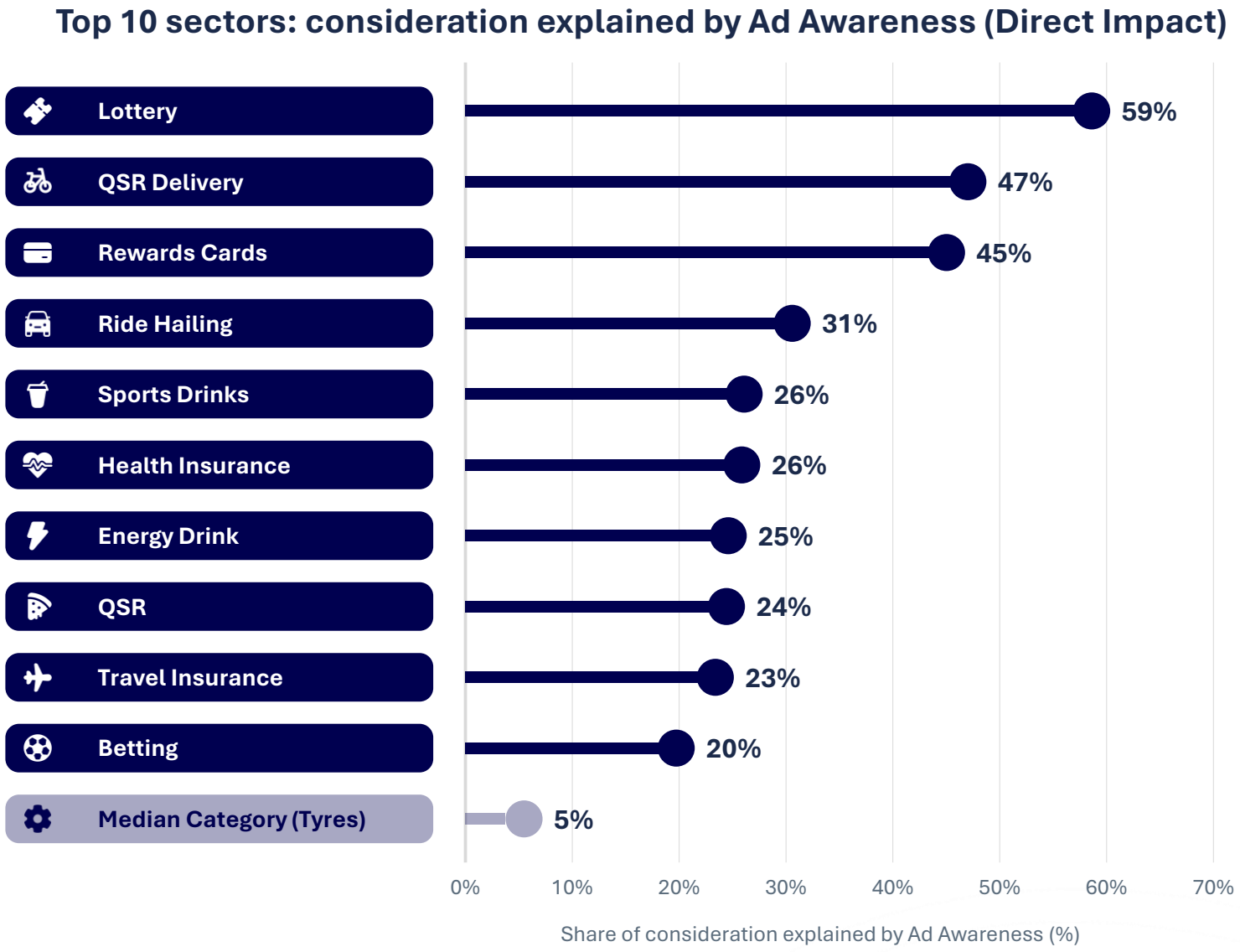
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Zooming in - there is significant variation in “levers” across sectors



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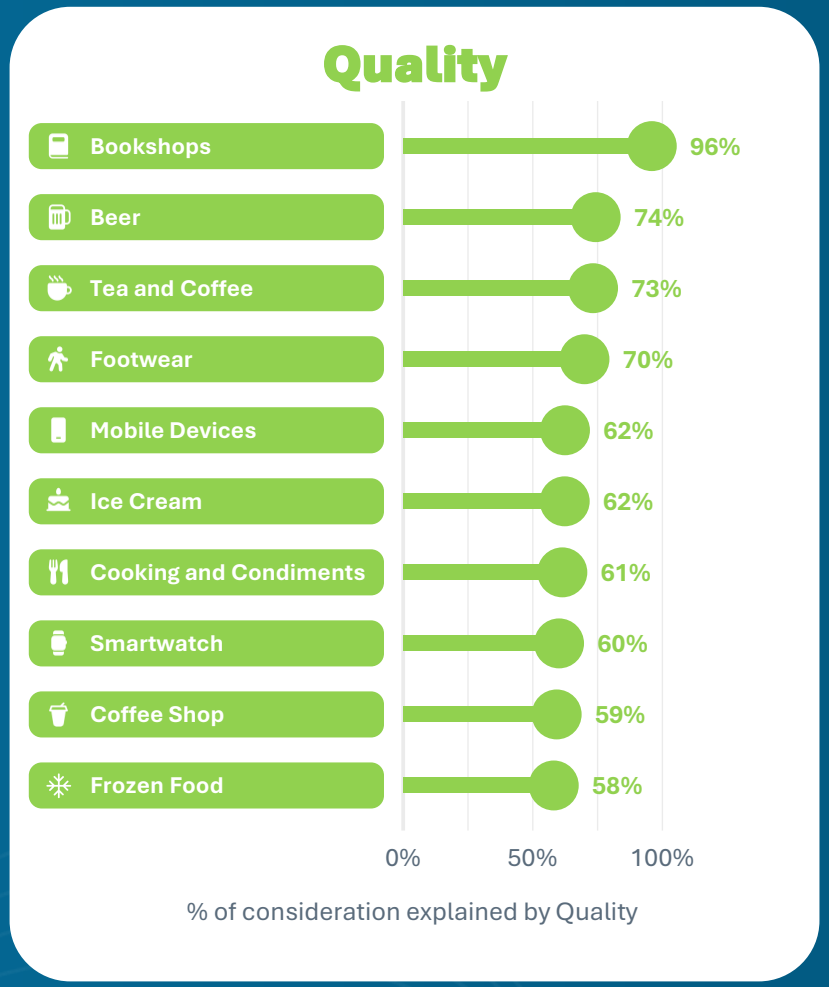
Ad Awareness' direct impact peaks in Lotteries and QSR Delivery

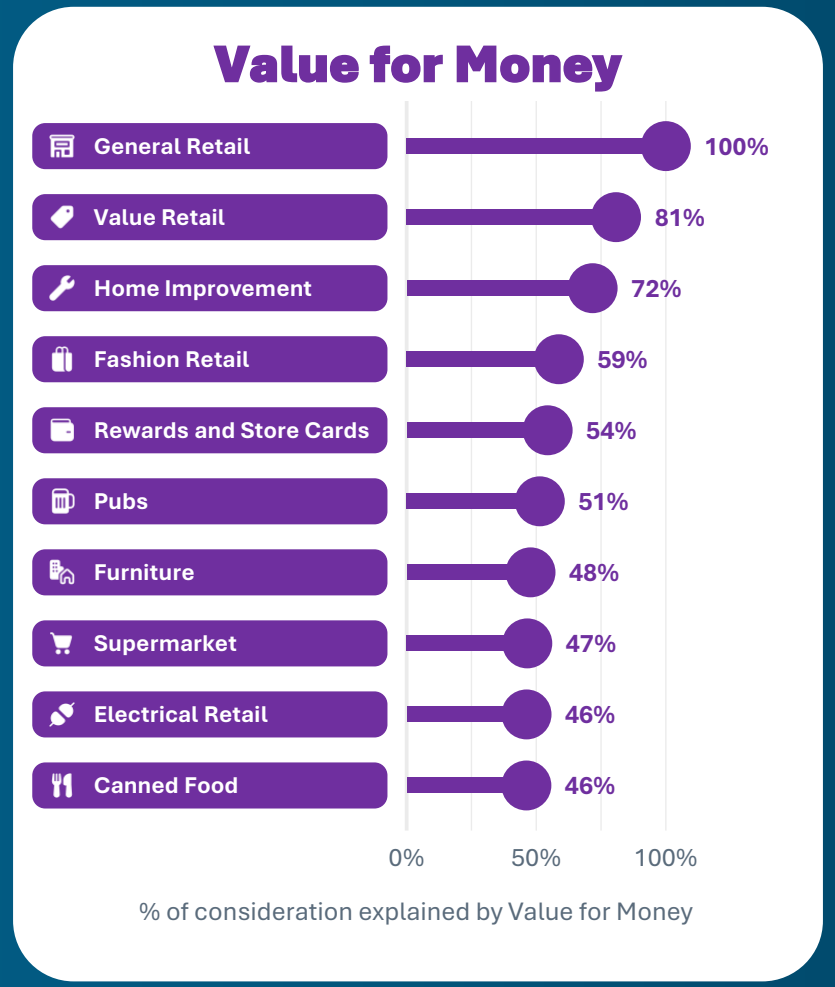


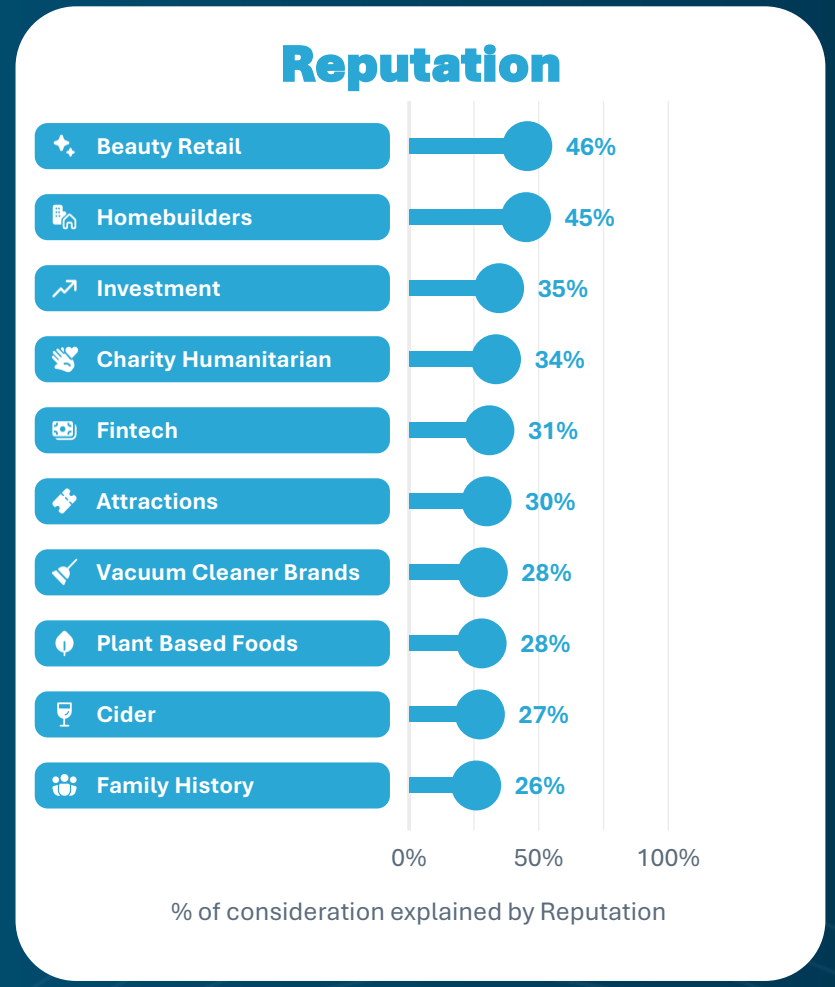
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Quality dominates food and footwear; Value is important in retail; Reputation is important for major personal finance and home building



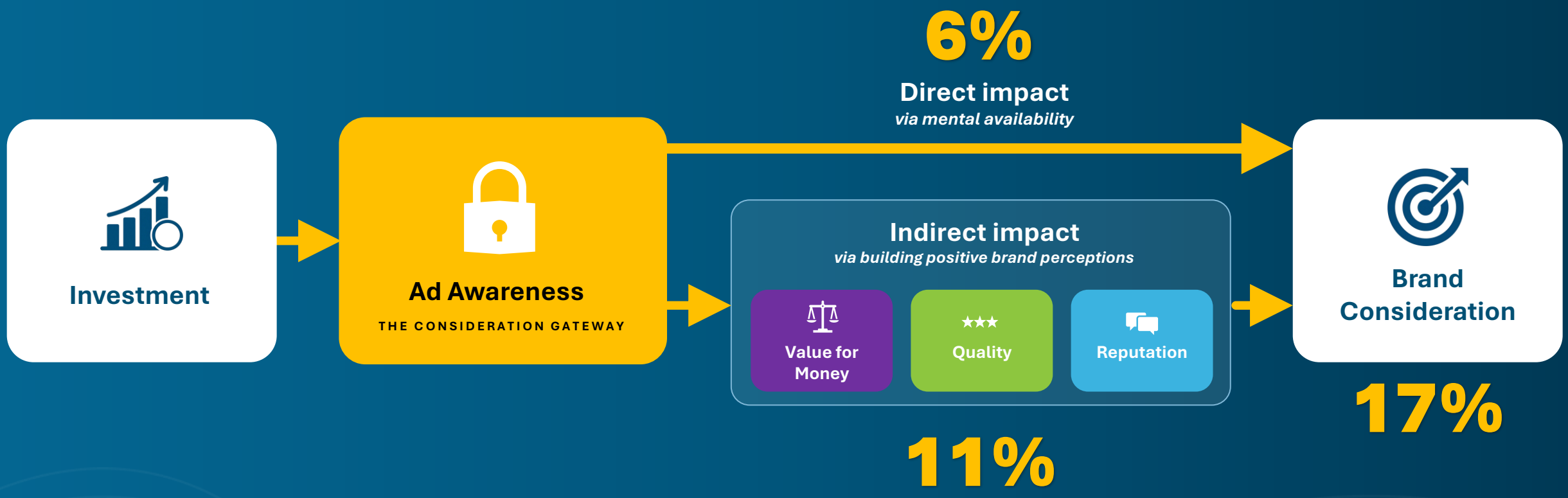




Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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The Framework: *Ad Awareness also supports Consideration by shifting Quality, Value and Reputation*

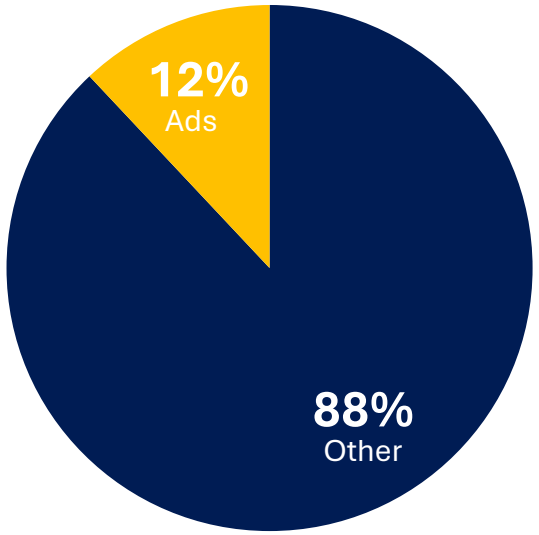


Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

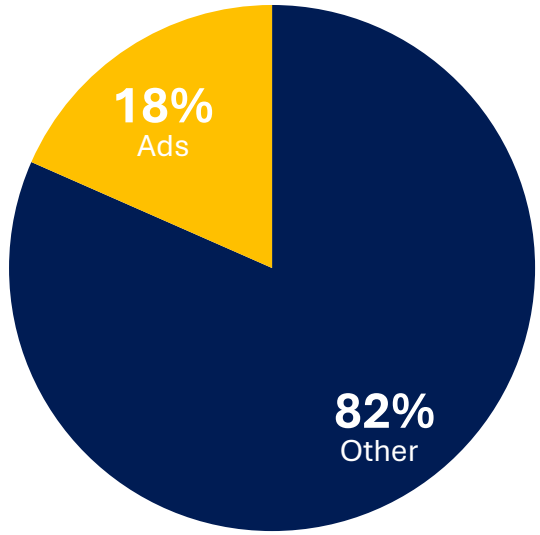
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Ad Awareness shifts all three intermediate consideration drivers

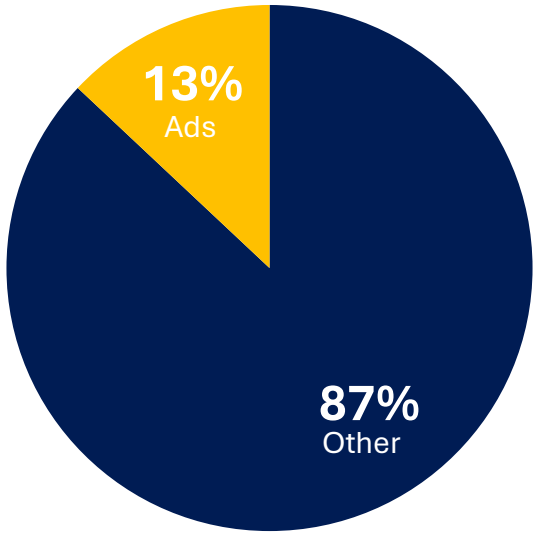
Quality



Value for Money



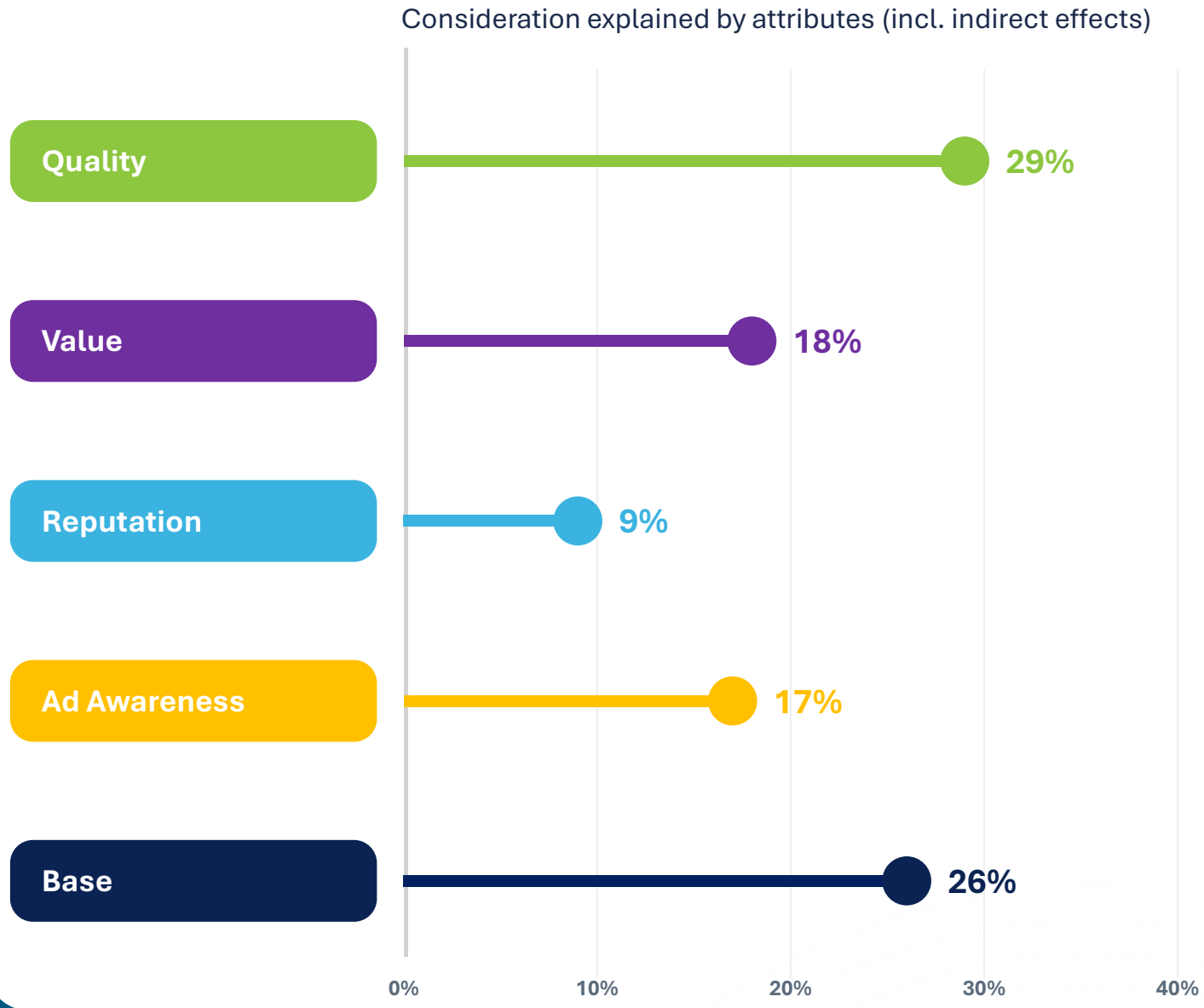
Reputation



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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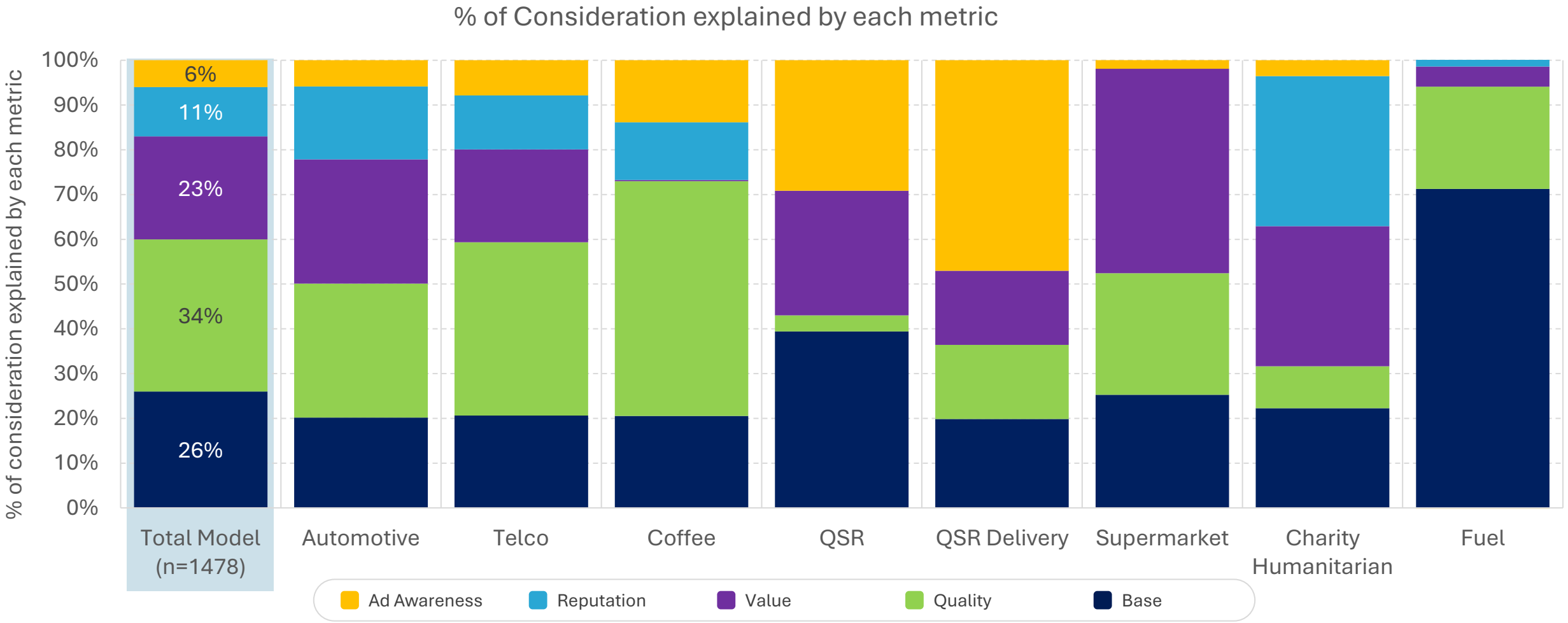
Including the indirect effect, we see the contribution from Ad Awareness rise to 17%



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

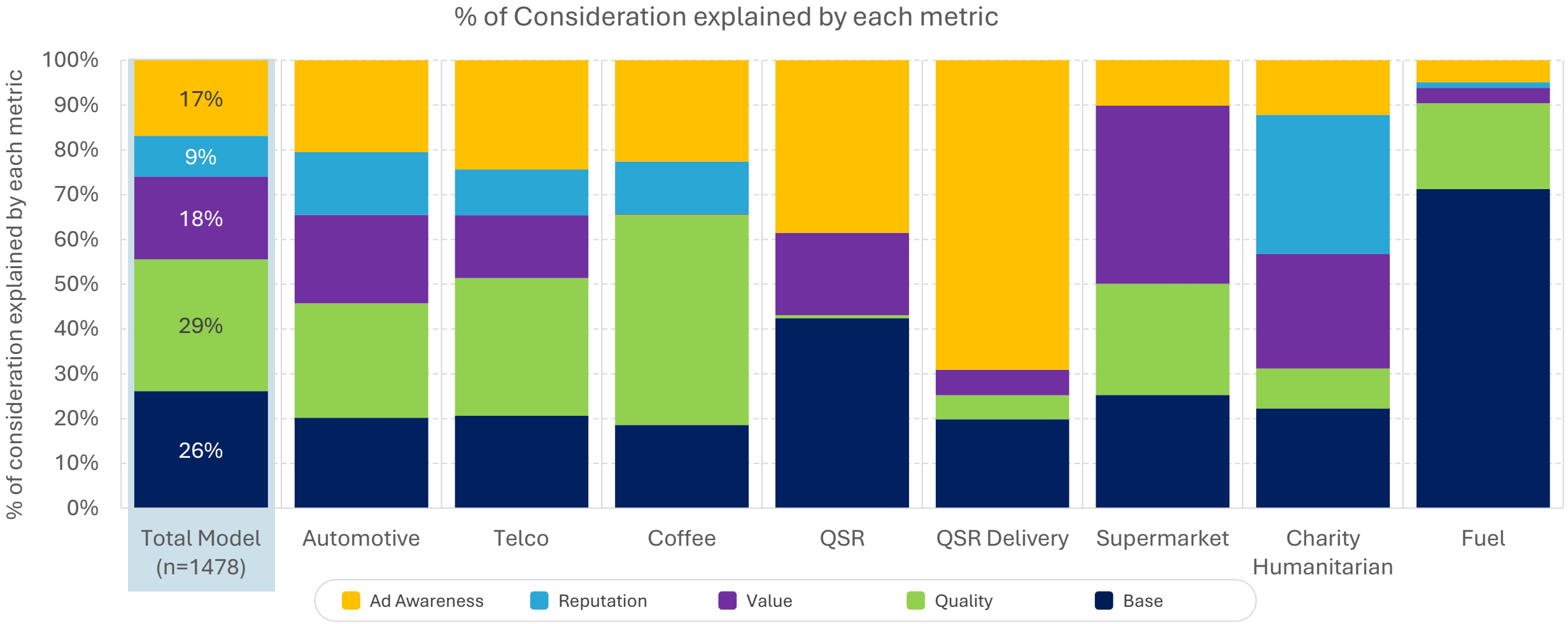
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By sector we can compare the direct 6% view of Ad Awareness...



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

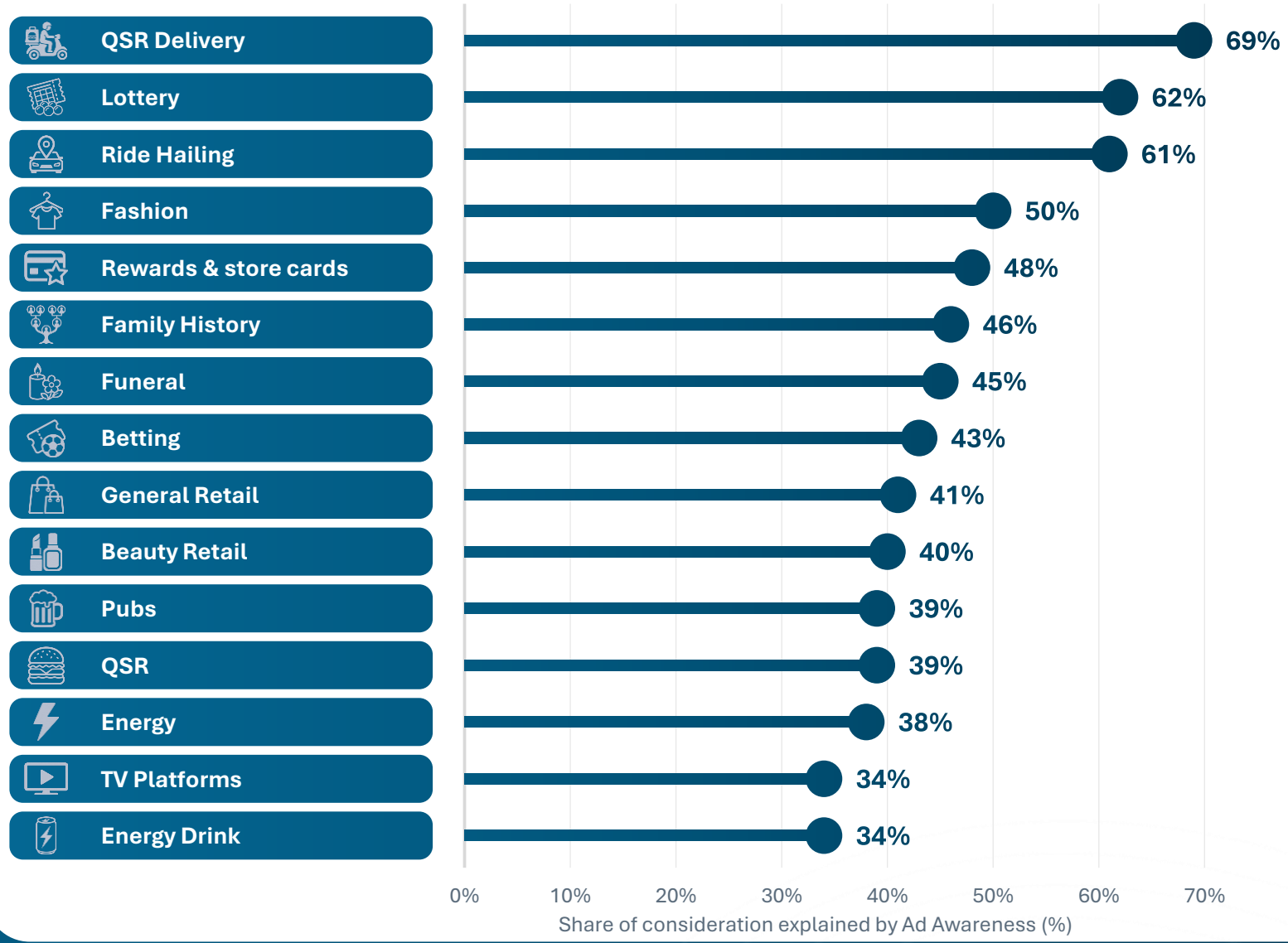
… to a fully inclusive 17% view of Ad Awareness



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Ad Awareness can drive up to 69% of consideration in some sectors

Top 15 sectors: consideration explained by Ad Awareness (Combined effect)

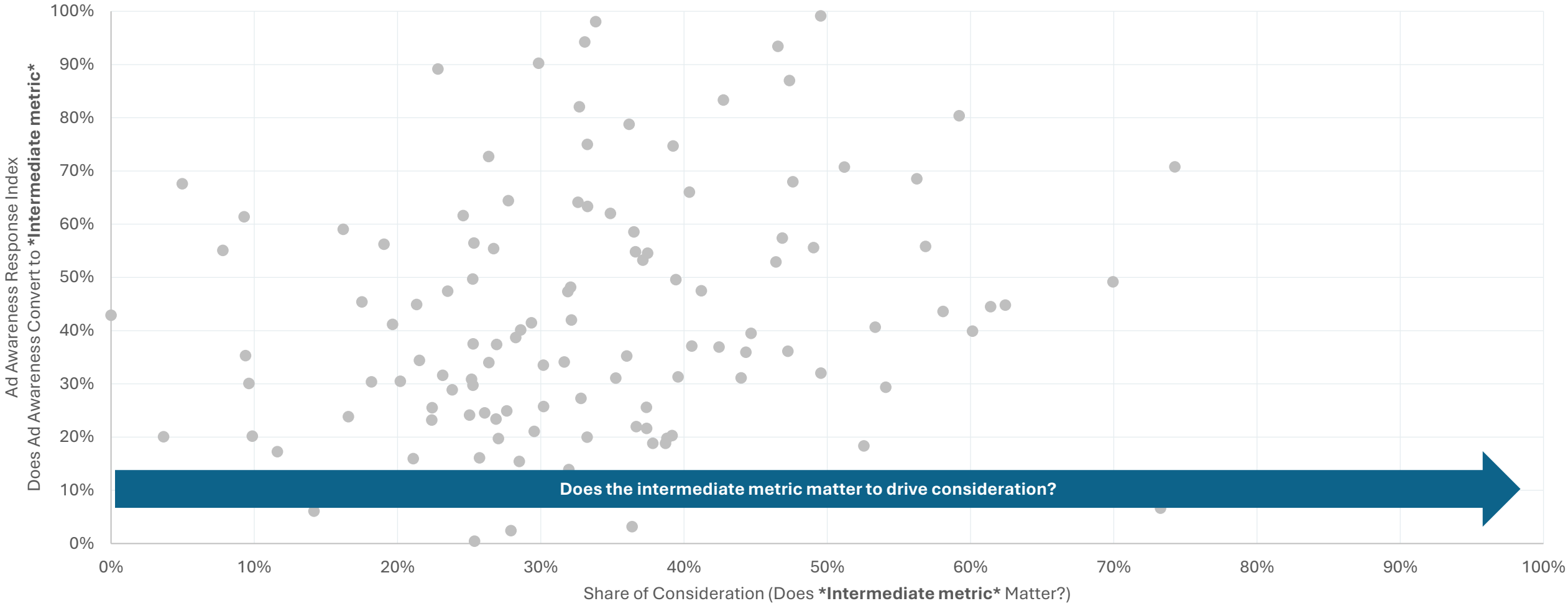


Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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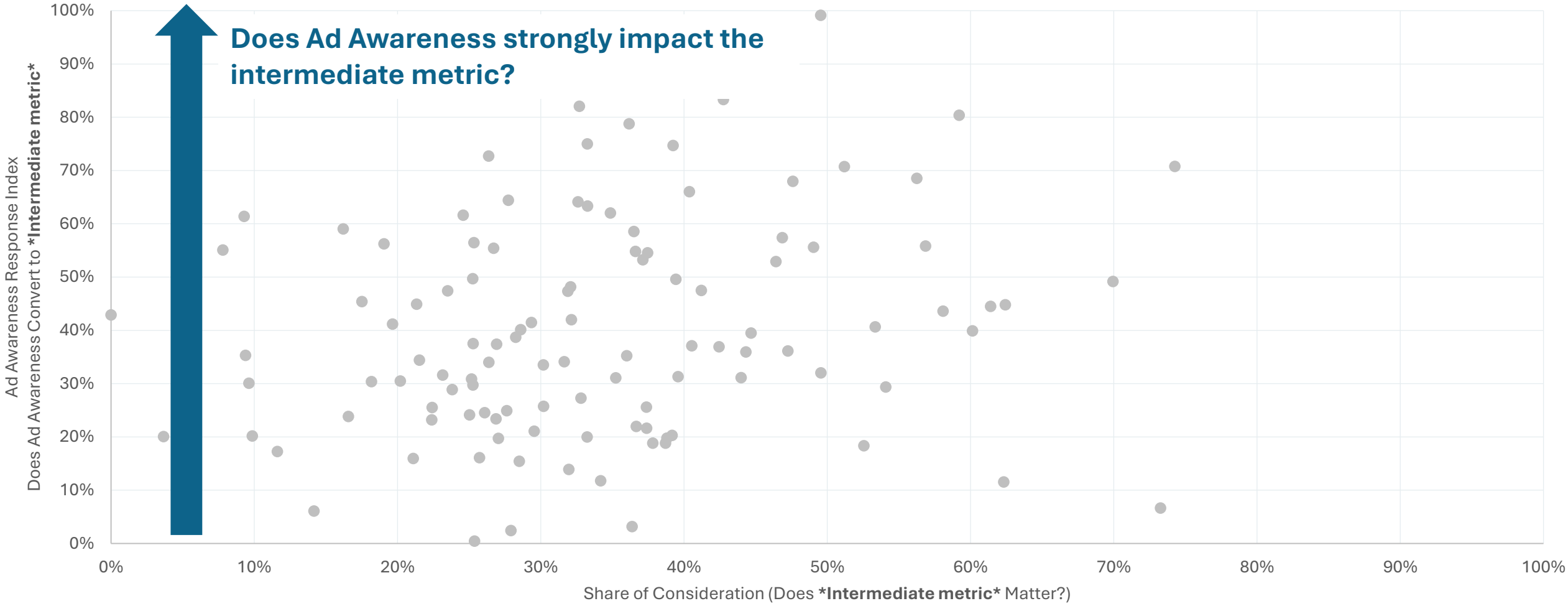
Should I care in practice?

How Ad Awareness shapes perceptions varies dramatically by sector



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

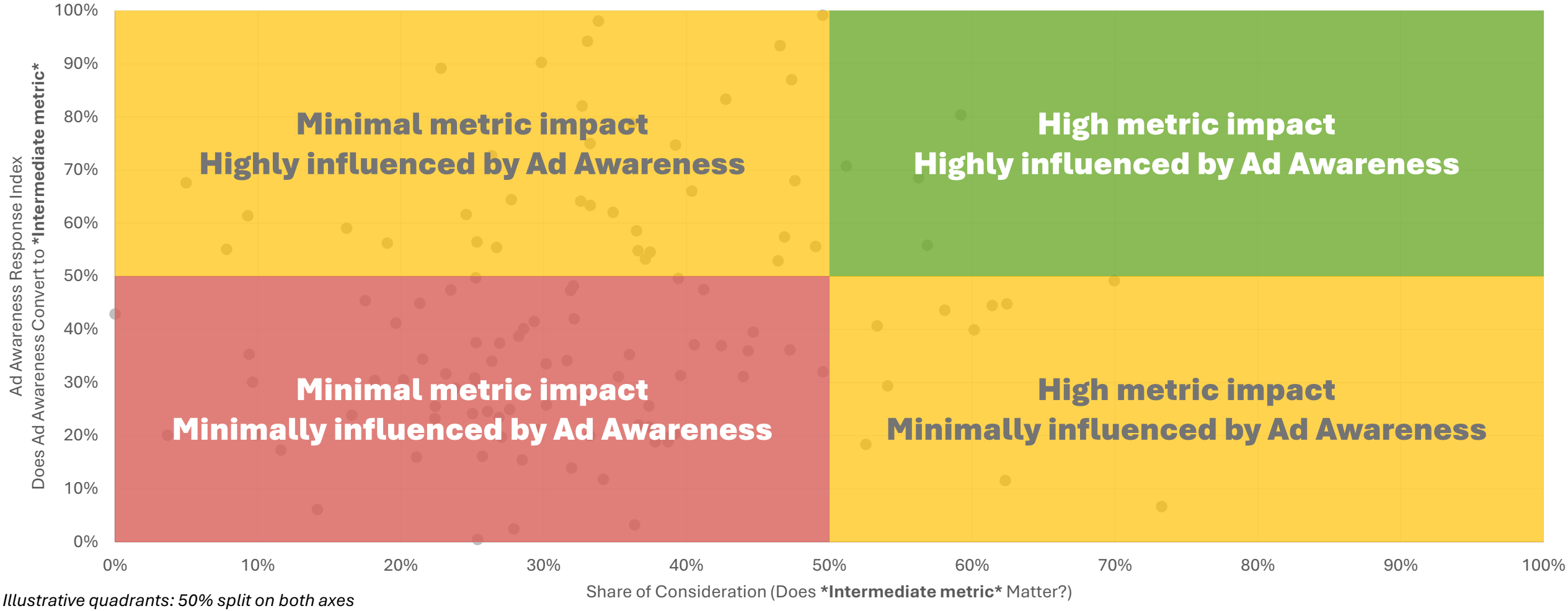
How Ad Awareness shapes perceptions varies dramatically by sector



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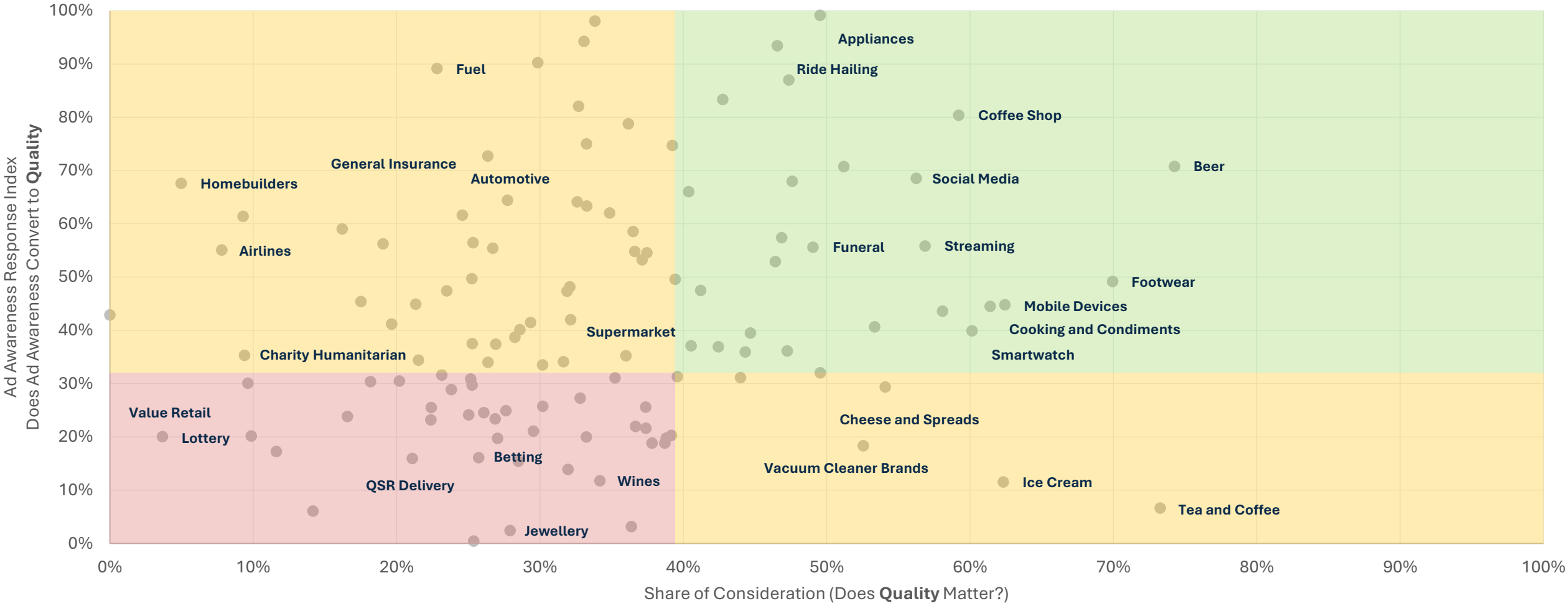
How Ad Awareness shapes perceptions varies dramatically by sector



Illustrative quadrants: 50% split on both axes

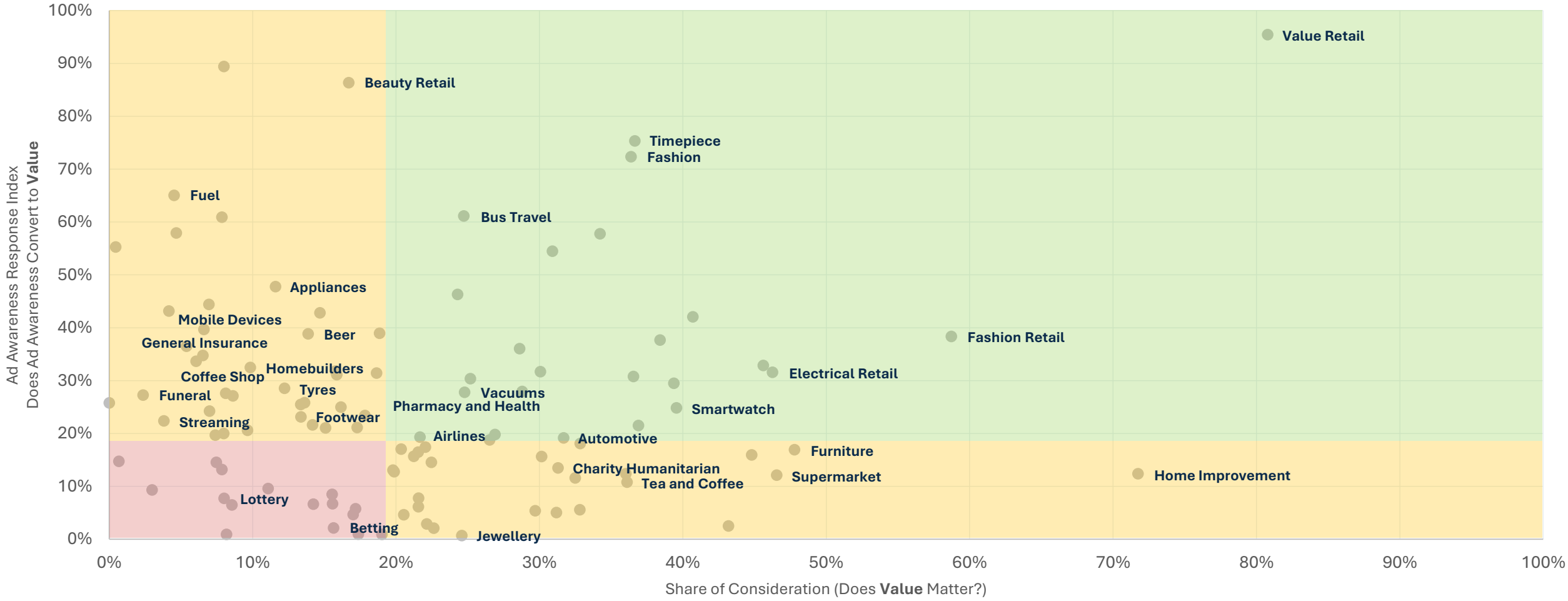
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Quality is a fundamental product attribute in categories like food, drink and appliances – but it can often be shifted by Ad Awareness



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Value is highly responsive to Ad Awareness – particularly in Retail



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Ad Awareness is advertising's original and best leading indicator:
yet it remains under-valued by brand teams and under-utilised in modern media planning

Advertising that you don't notice is unlikely to change what you consider or buy:
Ad Awareness is the essential gate to the commercial funnel

Ad Awareness shifts the perceptions that drive choice over the long-term:
topping up core brand perceptions like quality and value

Reconsider Ad Awareness: Ensuring your ads are seen and remembered must become a boardroom KPI, embedded across your media planning, buying, and measurement briefs

The **Awareness Effect** | *Brand Stories*

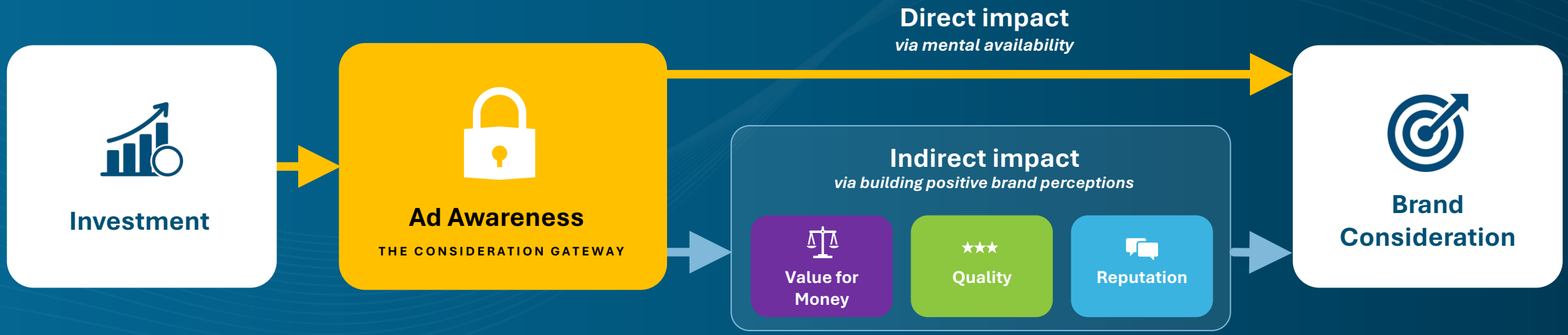
Sarika Rana, YouGov

Chris Dunne, Thinkbox

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Framework recap: how to read the brand stories

Ad Awareness is a critical gateway to be passed through.
It can drive consideration either directly through mental availability or indirectly by building brand perceptions



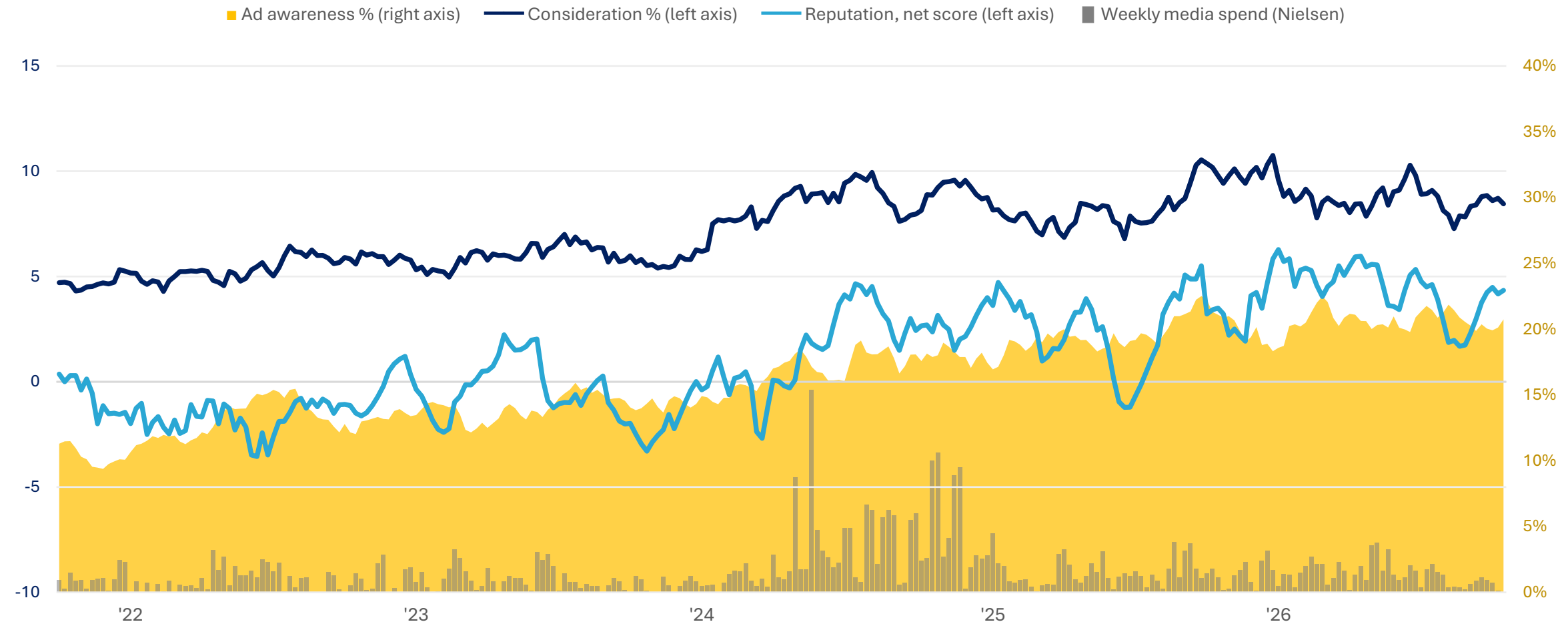
1 People notice the ads
More people have seen the brand advertised recently.

2 Perceptions improve
Intermediate metrics build following ad awareness rises.

3 Consideration grows
Through stronger perceptions, and directly through mental availability.

Source: The Awareness Effect, 2026: Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

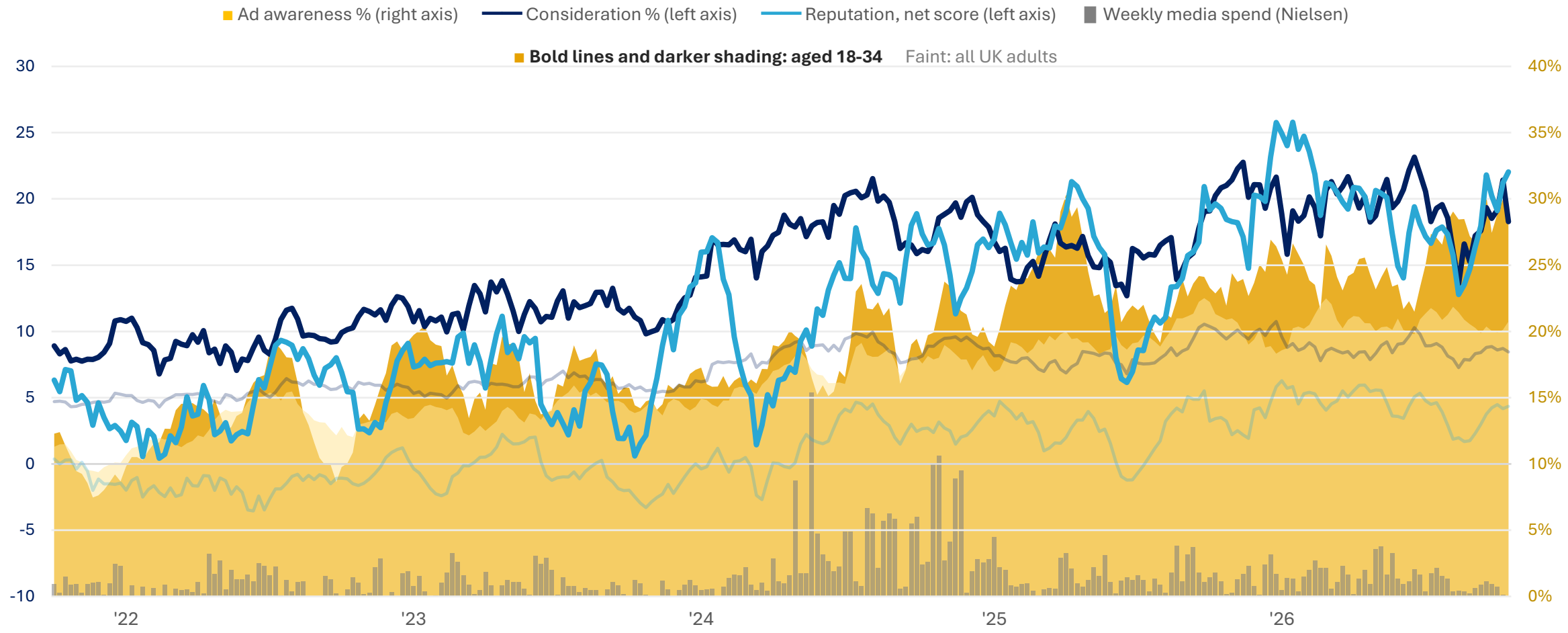
Red Bull: always-on ads built awareness, then reputation



Source: YouGov BrandIndex, UK adults (all respondents). Weekly data, 8-week moving average (volume-weighted), Oct 2021 to Oct 2026. Ad awareness and consideration in %; reputation as net score. Base c.2,250 per 8-week window. Bars: weekly media spend across all channels, Nielsen via Thinkbox (all Red Bull lines).

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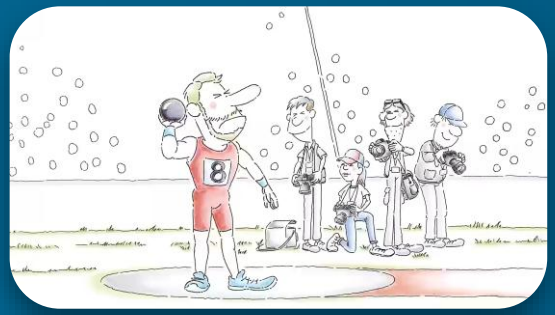
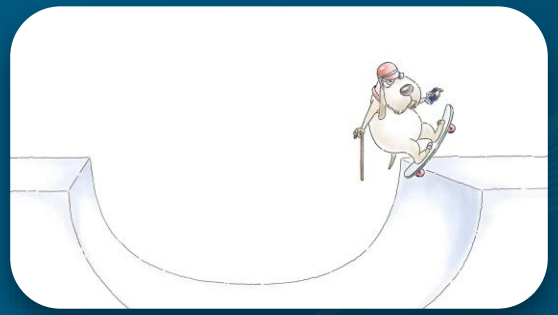
Red Bull: Biggest shifts among under 35s

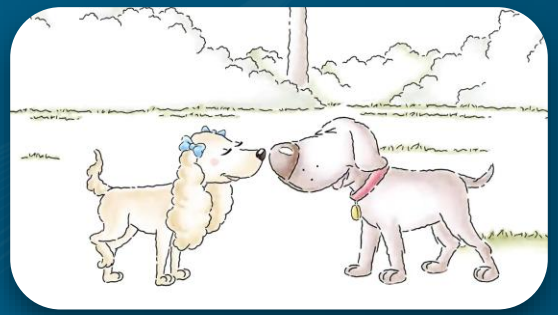


Source: YouGov BrandIndex, UK adults aged 18-34 (bold) vs all UK adults (faint). Weekly data, 8-week moving average (volume-weighted), Oct 2021 to Oct 2026. Ad awareness and consideration in %; reputation as net score. Base c.530 per 8-week window for 18-34s (min. 406); c.2,250 for all adults. Bars: weekly media spend across all channels, Nielsen via Thinkbox (all Red Bull lines).

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Red Bull: relentless consistency





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Red Bull: goes far beyond the cartoons



















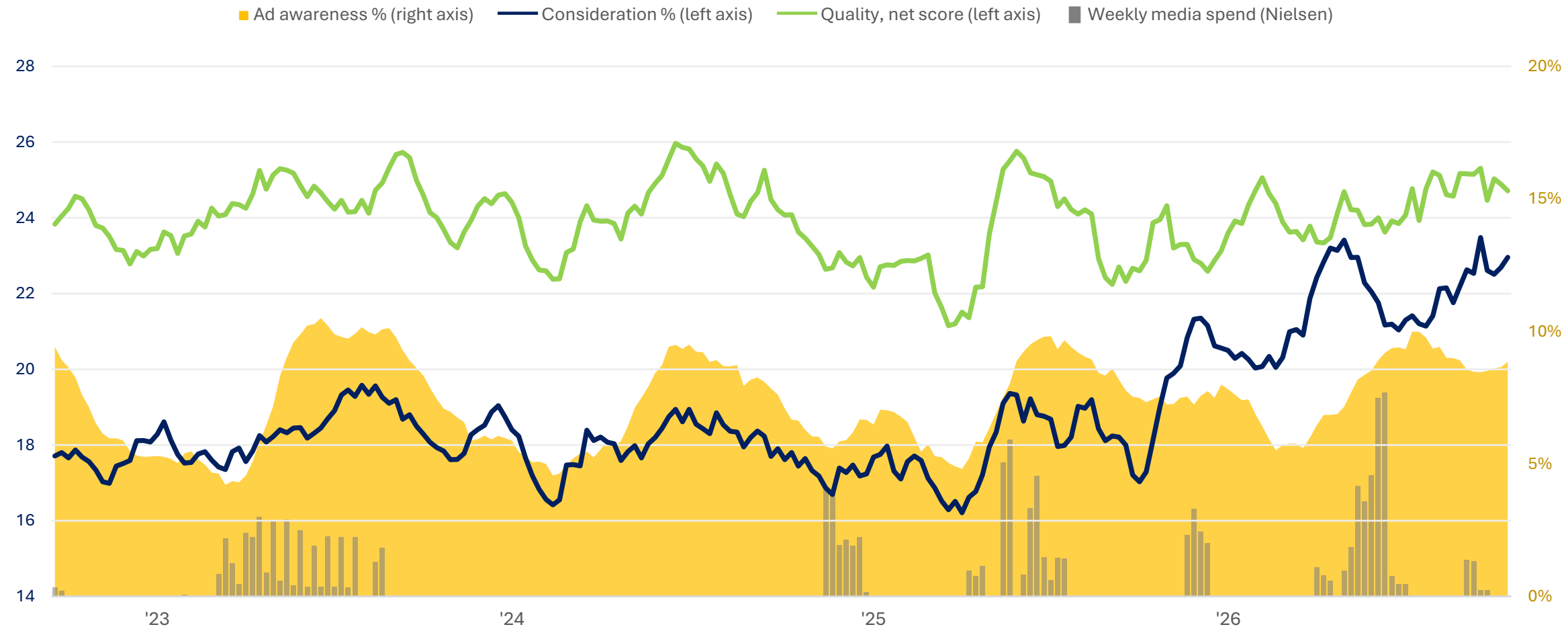






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Birra Moretti: each summer burst lifts ad awareness and quality



Source: YouGov BrandIndex, UK adults (all respondents). Weekly data, 8-week moving average (volume-weighted), Sep 2022 to Oct 2026. Ad awareness and consideration in %; quality as net score. Base c.4,560 per 8-week window. Bars: weekly media spend across all channels, Nielsen via Thinkbox (all Birra Moretti lines).

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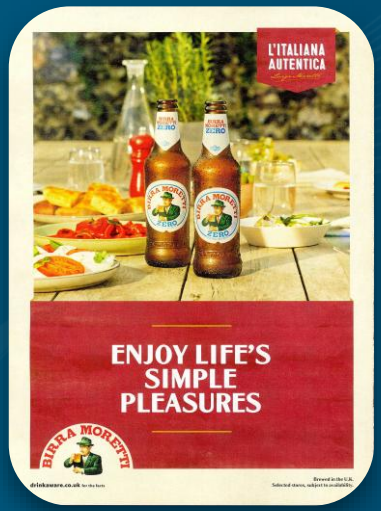
Birra Moretti: distinctive assets that break category codes



Birra Moretti: Italian summer, seen in every channel







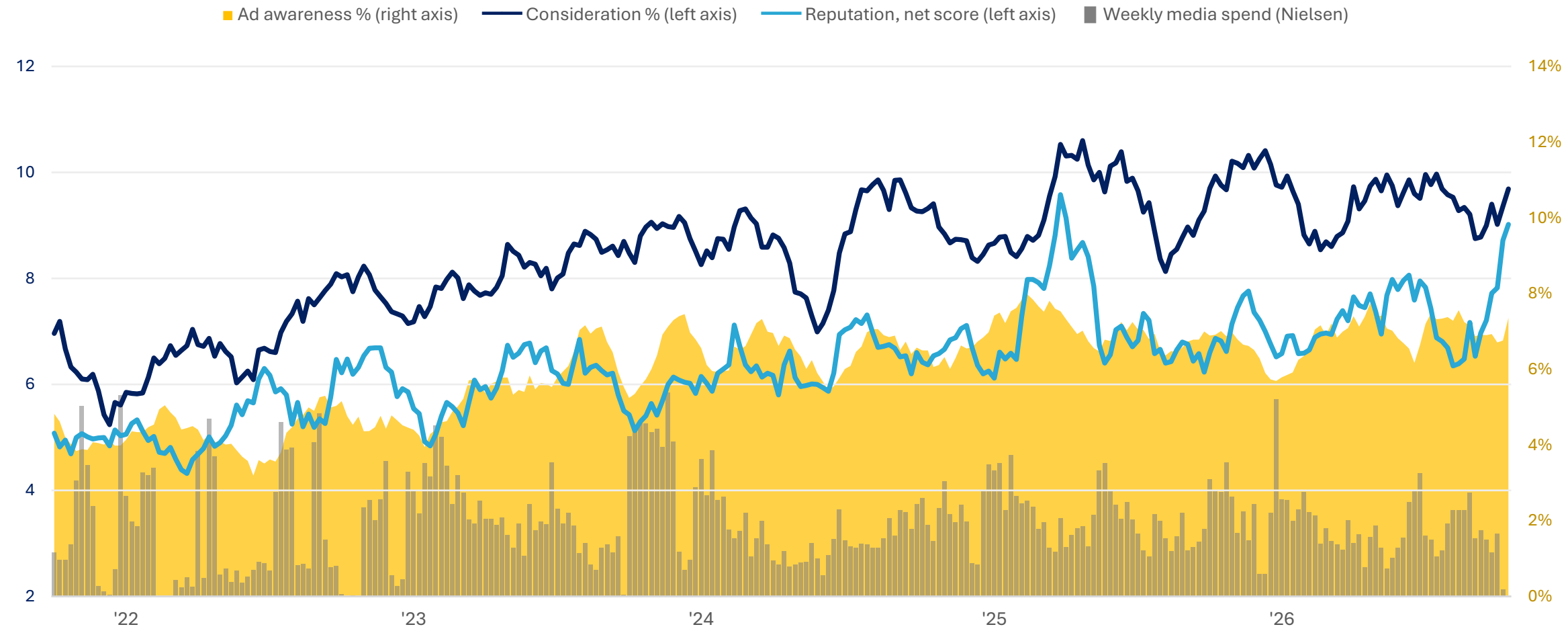






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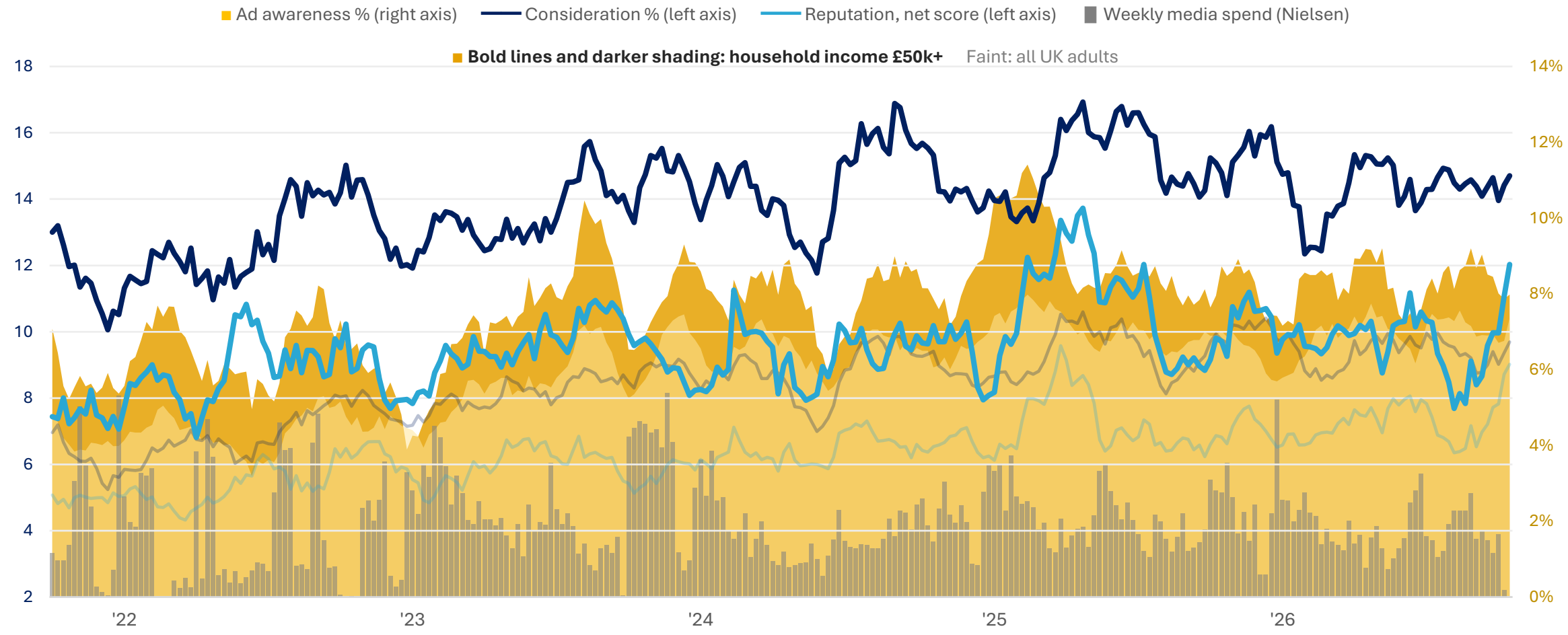
Vitality: spend, then ad awareness, then consideration



Source: YouGov BrandIndex, UK adults (all respondents). Weekly data, 8-week moving average (volume-weighted), Oct 2021 to Oct 2026. Ad awareness and consideration in %; reputation as net score. Base c.4,420 per 8-week window. Bars: weekly media spend across all channels, Nielsen via Ebiquity (all Vitality lines excluding Vitality Invest and car insurance).

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Vitality: £50k+ earners run well ahead



Source: YouGov BrandIndex, UK adults with household income £50k+ (bold) vs all UK adults (faint). Weekly data, 8-week moving average (volume-weighted), Oct 2021 to Oct 2026. Ad awareness and consideration in %; reputation as net score. Base c.1,590 per 8-week window for £50k+ (min. 983); c.4,420 for all adults. Bars: weekly media spend across all channels, Nielsen via Ebiquity (all Vitality lines excluding Vitality Invest and car insurance).

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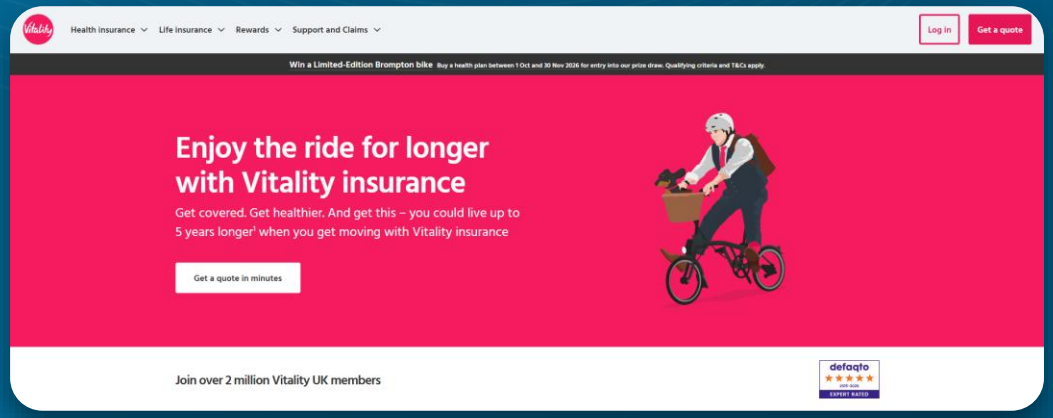
Vitality: a fluent device that evolved with the business



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Vitality: a distinctive device, used consistently over time













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BIRRA MORETTI
DAL 1859





The Awareness Effect

How media drive ad awareness

Dom Charles, WPP Media

Jane Christian, WPP Media

Fergal Smithwick, Gain Theory

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The people behind the work

Thinkbox / 18 November

Ad Awareness!


Fergal (and Meabh)


Jamie

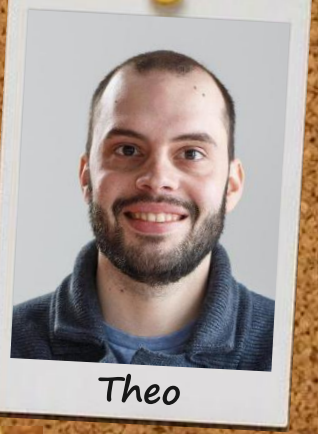

Nic


Ben


Jane


Abdul

Benchmarks


Theo


Val


Mike


Dom (and Ben)


Chirag

Profit Ability 3?

I ♥ bubble charts


If we want Ad Awareness taken seriously in the boardroom, we have to know exactly what drives it
thinkbox
ebiquity
GAIN THEORY
WPP Media
YouGov

The world's first **Ad Awareness** benchmark database

90
Brands

£5.2bn
Analysed spend

12
Media channels

3
Age groups
(18-34s, 35-49s, 50+)

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Using bespoke econometric modelling to dissect Ad Awareness

INPUTS

Ad Awareness

YouGov Brand Index

Weekly media spend

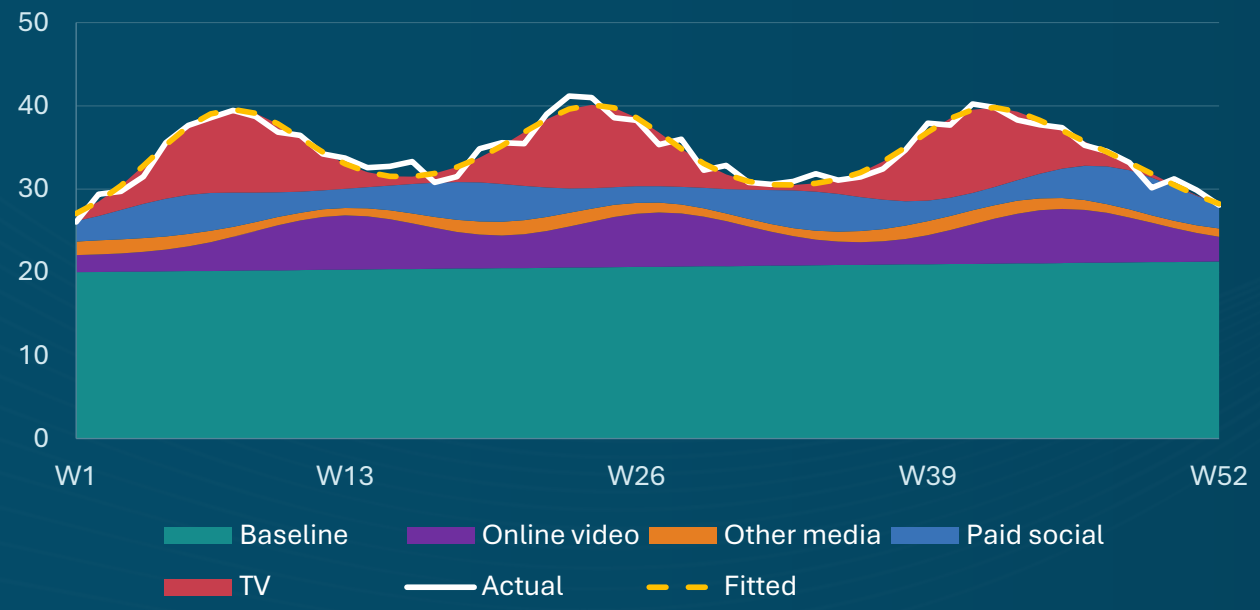
By channel, 2+ years (2023–2026)

BESPOKE ECONOMETRIC MODEL

Smoothing & averaging | **Adstock decay** | **Diminishing returns**

Ad awareness: model fit and contributions

Awareness (%) and contributions (percentage points)



Illustrative example

OUTPUTS

Channel uplift

Ad Awareness uplift by channel

Efficiency benchmarks

Uplift per £1m of spend

Saturation curves

Awareness change with spend

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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What's included in each channel

CHANNEL	SPEND %	WHAT'S INCLUDED
Addressable TV	12%	Targeted TV advertising delivered via digital mechanisms, including BVOD, SVOD, Connected TV (CTV) and Sky AdSmart.
Audio	7%	All audio formats, encompassing linear radio, digital audio streaming and podcasts.
Broadcast TV	36%	Traditional linear television advertising.
Cinema	1%	On-screen advertising across commercial cinema venues.
Influencers	1%	Creator-led social media content and brand promotions delivered directly to creator communities.
Online Display	7%	Display advertising across direct and programmatic buys *(Note: includes digital newsbrand spend)*.
Online Video	8%	Predominantly YouTube with some other pre-roll, mid-roll, and post-roll video formats across web and video platforms
OOH (Out-of-Home)	8%	Digital and static poster formats across all outdoor and indoor environments.
Paid Social – Meta	12%	All static and video advertising formats across Facebook and Instagram.
Paid Social – Other	2%	Advertising across other social platforms, including X, Reddit, Snapchat, and Pinterest.
Paid Social – TikTok	2%	All short-form video and static advertising formats within TikTok.
Print	4%	Print advertising in newspapers and magazines *(Note: Digital newsbrand inventory is classified under Online Display)*.

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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The key metric we'll talk about today

Ad Awareness per £1m

Think of it as awareness ROI

The higher the number, the harder spend works

The next 30 minutes



The balancing act



The overlooked middle



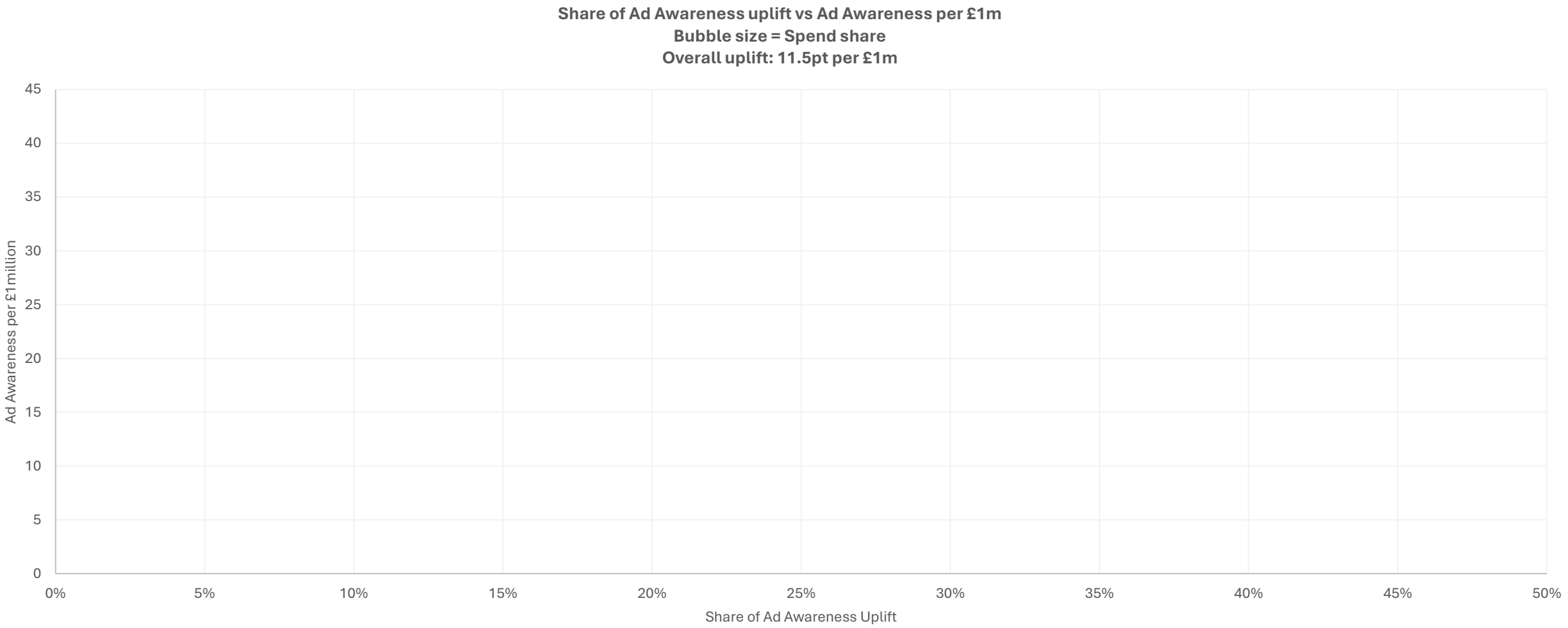
Repeat after me



01. The balancing act

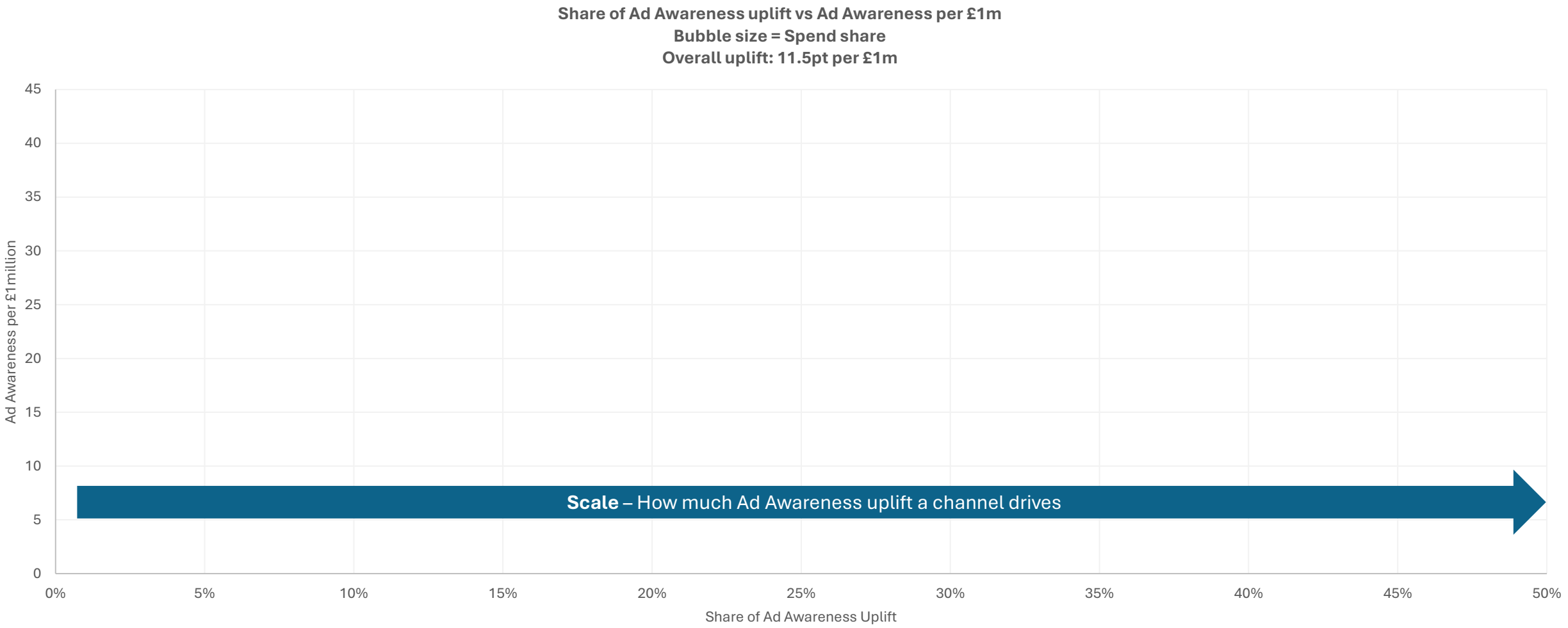
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Comparing scale & efficiency across different channels



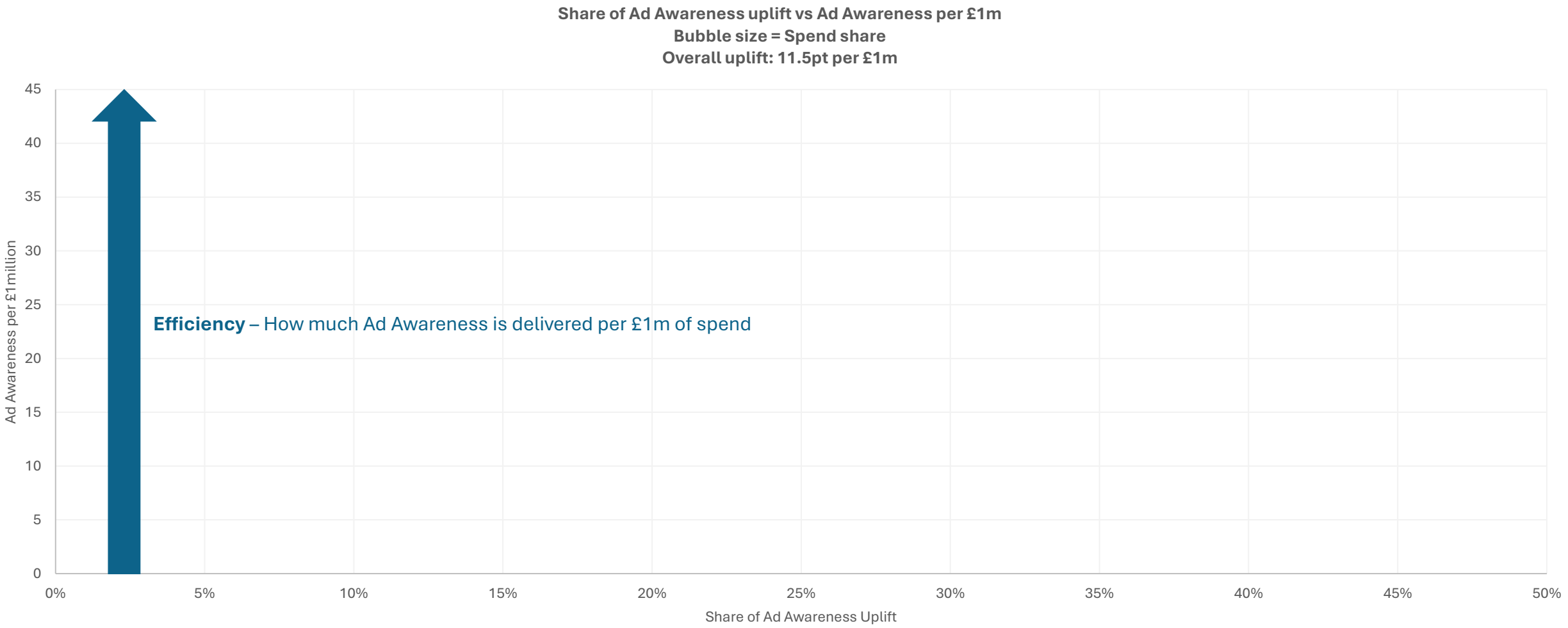
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Scale – how much Ad Awareness a channel delivers



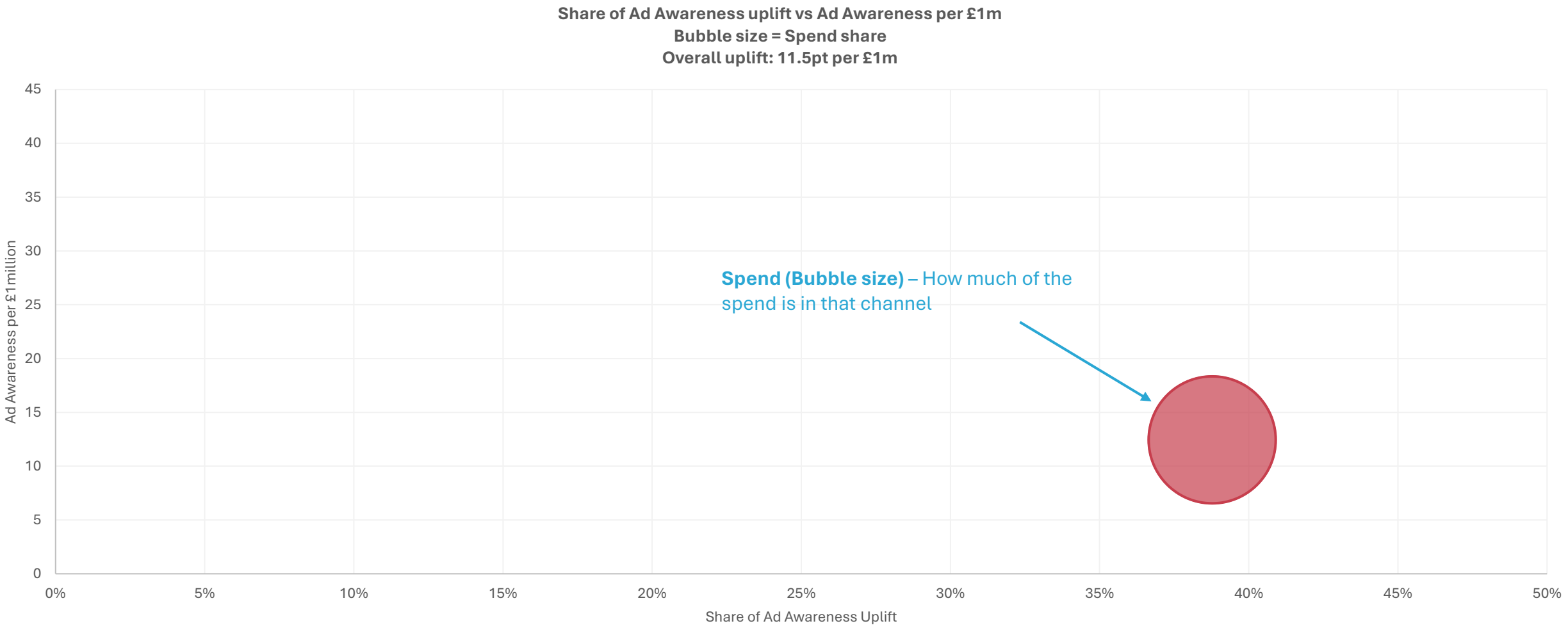
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Efficiency – how much Ad Awareness you get per £1m



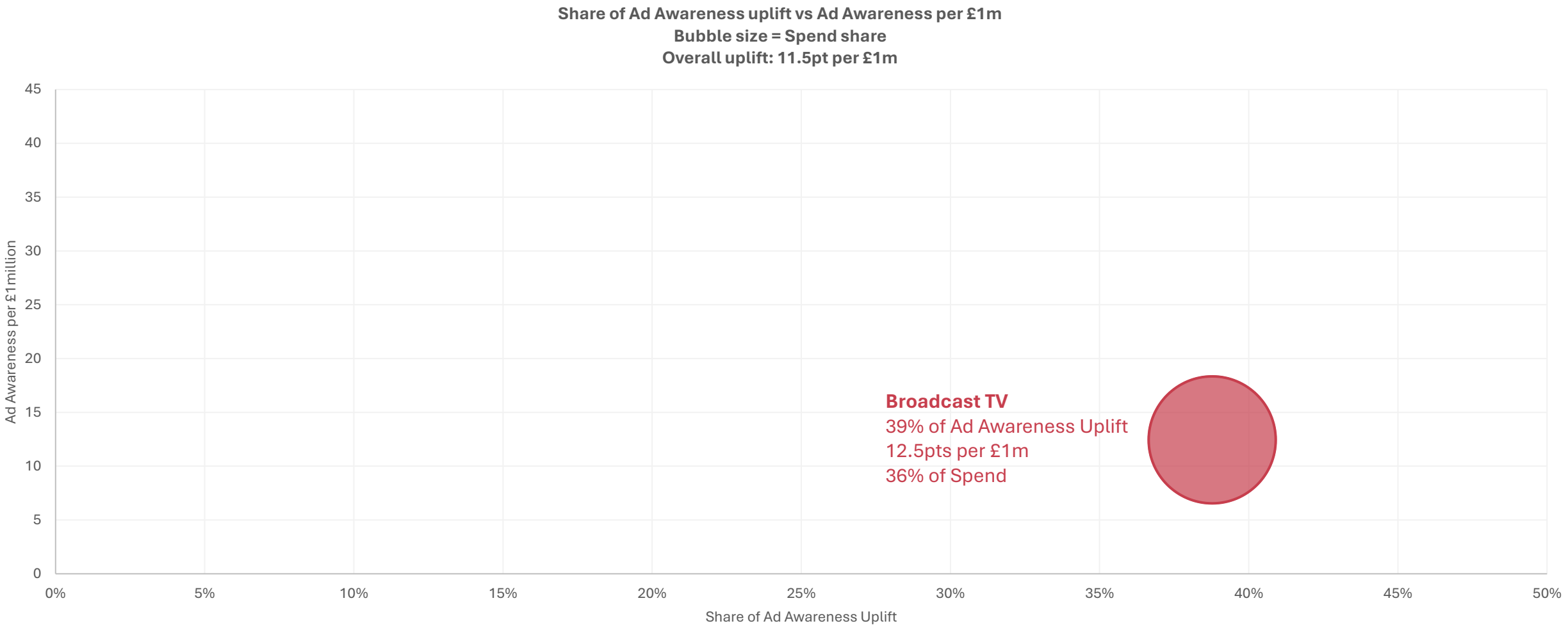
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Spend – how much effort is put behind a channel



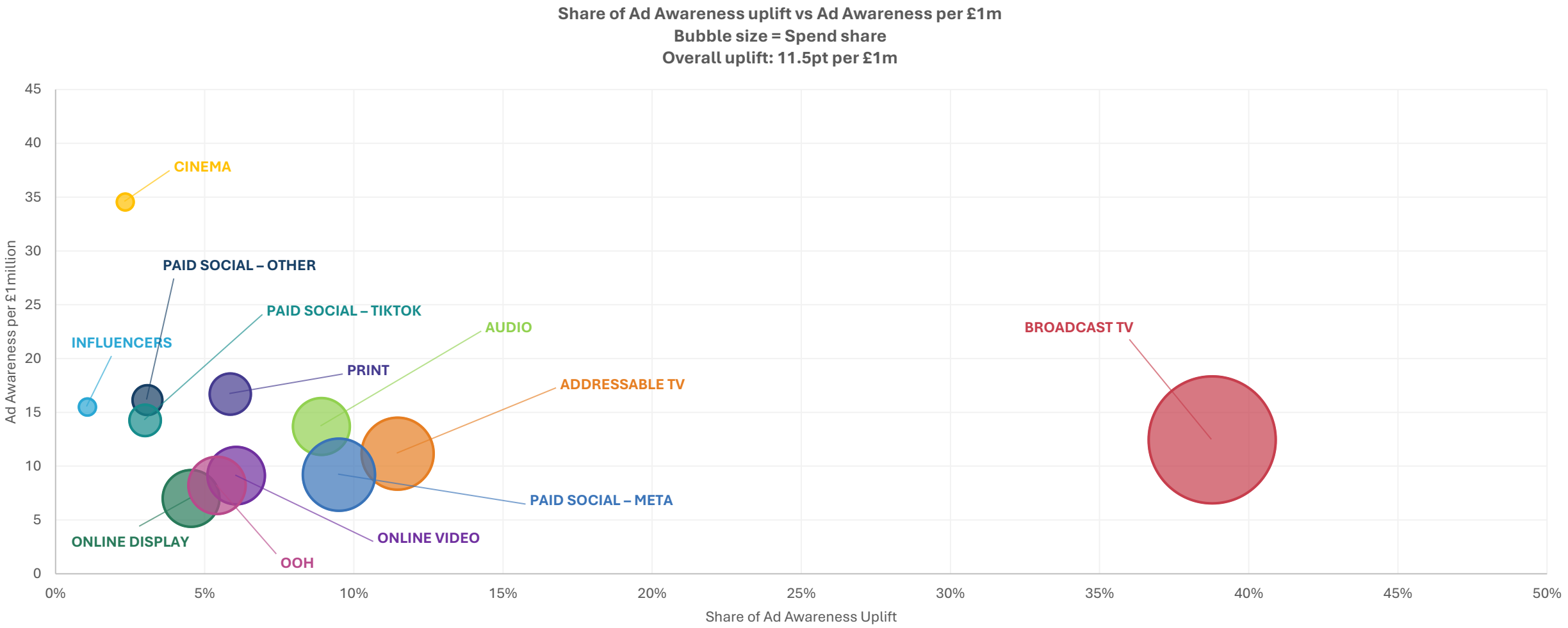
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Putting it all together



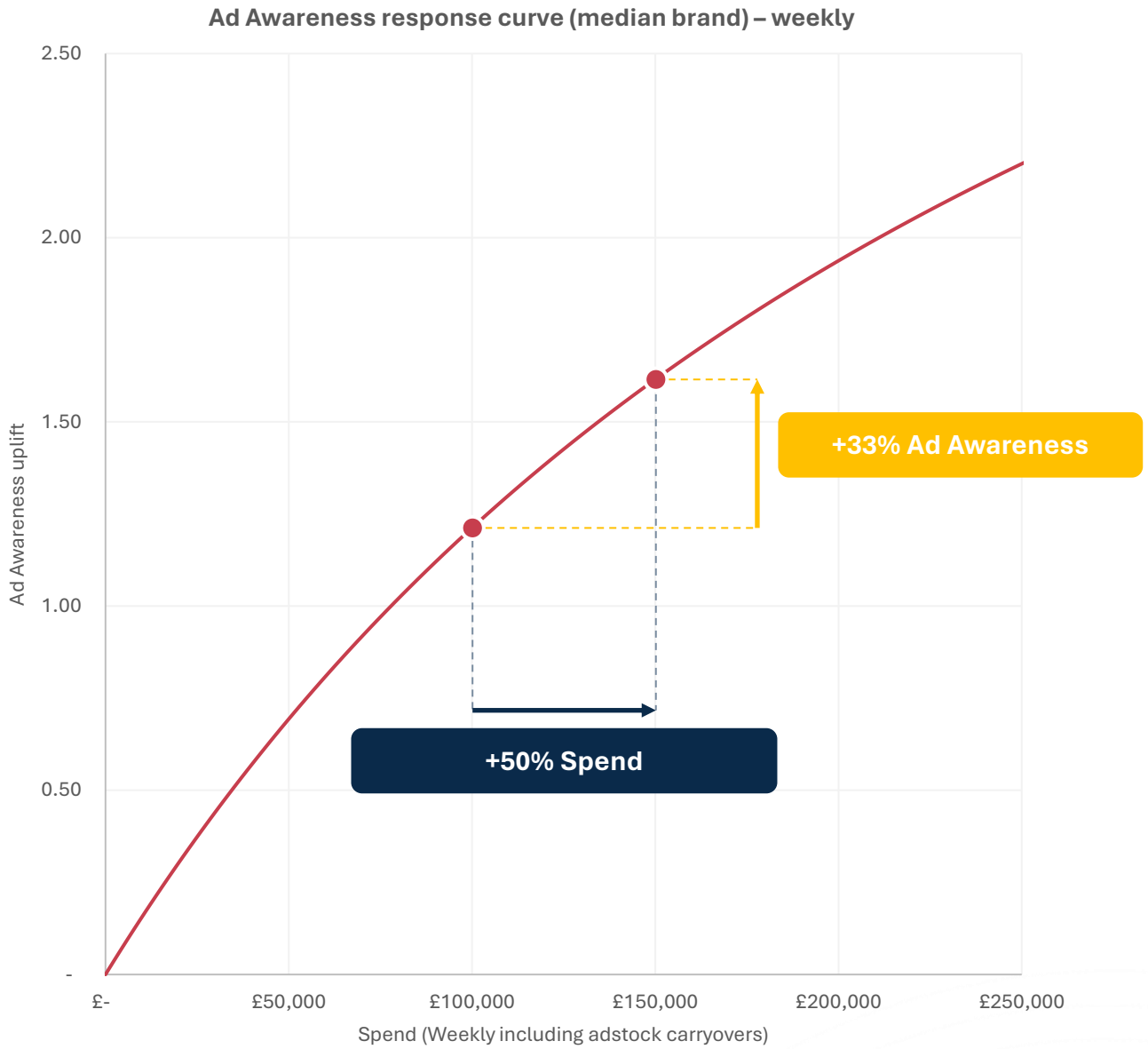
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Every channel has a distinct role – driving scale or driving efficiency



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

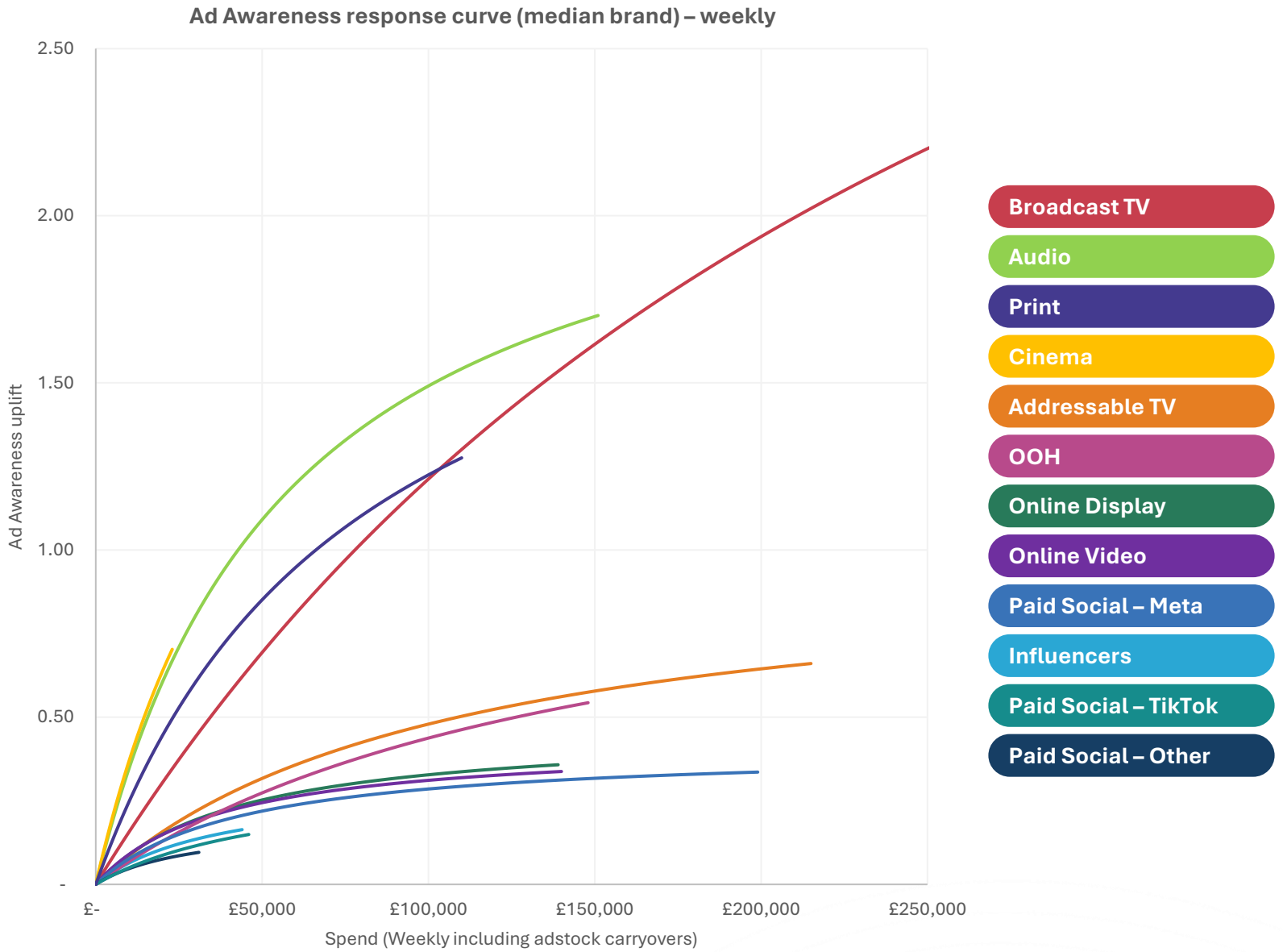
As spend increases, incremental Ad Awareness becomes harder to drive



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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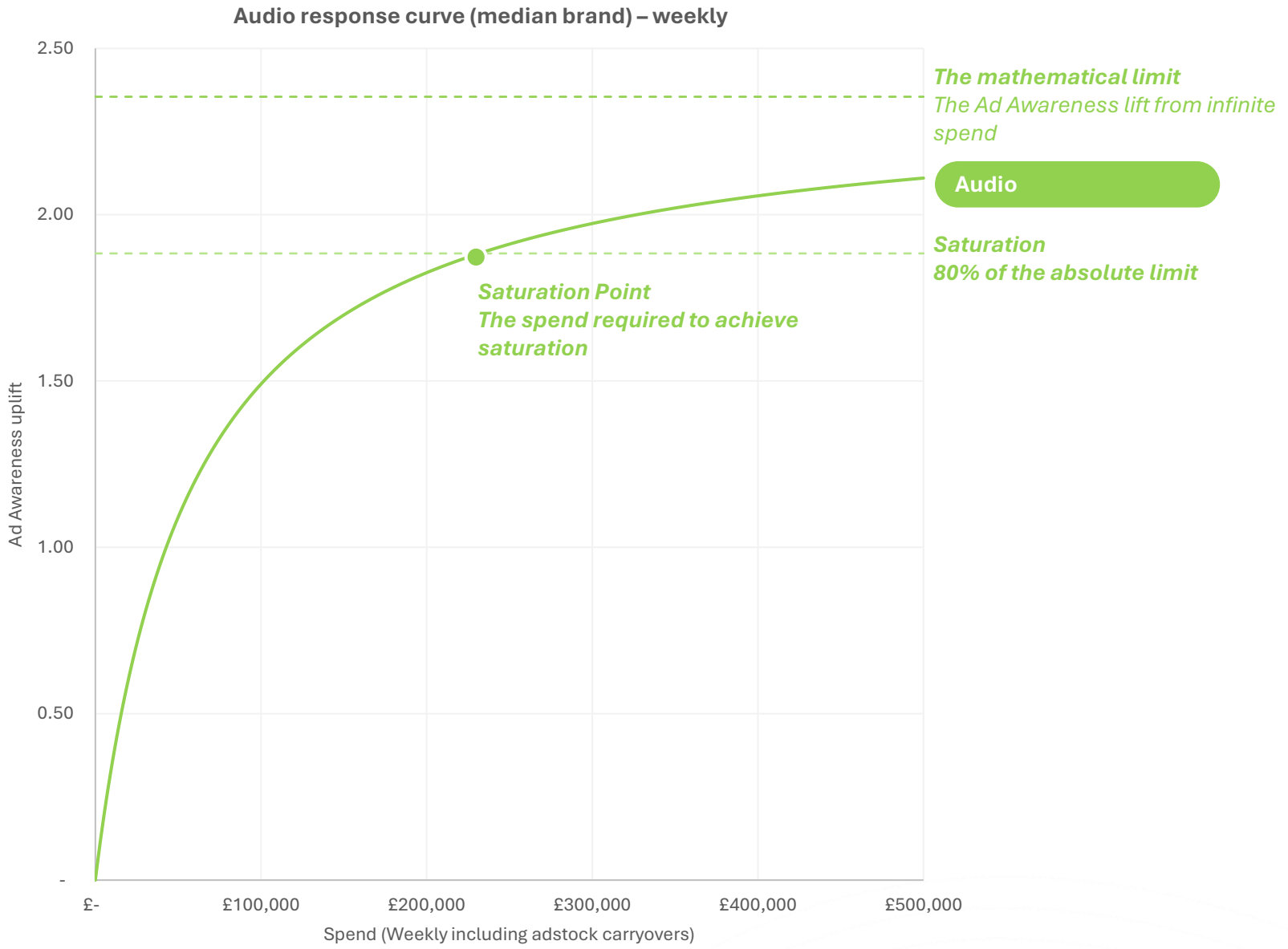
All channels hit diminishing returns but at vastly different rates



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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These curves help us identify the spend potential of each channel



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Channel saturation happens at very different spend & efficiency levels

CHANNEL	SPEND at saturation (8-week campaign)	AD AWARENESS UPLIFT at saturation (8-week lift)	AD AWARENESS PER £1m (INDEX) at saturation (8-week average)
Addressable TV	£1.83m	0.79	64
Audio	£1.19m	1.88	235
Broadcast TV	£4.88m	3.82	116
Cinema	£1.10m	1.86	251
Influencers	£0.79m	0.24	46
Online Display	£0.91m	0.37	61
Online Video	£0.72m	0.34	71
OOH	£3.09m	0.87	42
Paid Social – Meta	£0.96m	0.37	58
Paid Social – Other	£0.43m	0.11	37
Paid Social – TikTok	£1.31m	0.28	33
Print	£1.65m	1.75	158

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
Assumes 8 week campaign period with flat delivery by week
Saturation defined as 80% of maximum theoretical uplift on average over an 8 week period

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What works well in one sector might not in another

% of Ad Awareness Effect

	All Sector Average	Automotive	Financial Services	FMCG - Drinks	FMCG - food	FMCG - non-food	Large Retail & QSR	Small Retail	Telecoms
Addressable TV	11%	1%	4%	34%	29%	11%	14%	5%	4%
Audio	9%	n/a	12%	n/a	1%	5%	6%	25%	18%
Broadcast TV	39%	36%	71%	38%	44%	33%	35%	39%	45%
Cinema	2%	n/a	2%	n/a	0%	n/a	2%	1%	8%
Influencers	1%	n/a	n/a	6%	1%	n/a	1%	1%	2%
Online Display	5%	n/a	2%	3%	2%	9%	4%	7%	0%
Online Video	6%	8%	0%	3%	9%	4%	7%	4%	3%
OOH	5%	15%	3%	4%	2%	2%	7%	3%	1%
Paid Social – Meta	9%	19%	0%	11%	9%	30%	9%	9%	3%
Paid Social – Other	3%	11%	n/a	n/a	1%	1%	5%	3%	4%
Paid Social – TikTok	3%	1%	1%	n/a	1%	2%	2%	n/a	4%
Print	6%	9%	5%	n/a	n/a	4%	8%	3%	8%

Financial Services

Broadcast TV drives 71% of awareness, the highest single channel share of any sector

FMCG – Food & Drink

Addressable TV delivers 29–34% of awareness and has the narrowest difference to Broadcast TV

Small Retail & Telecoms

Audio is a clear scaled channel – second largest after Broadcast TV

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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What works well in one sector might not in another

Efficiency Index

	All Sector Average	Automotive	Financial Services	FMCG - Drinks	FMCG - food	FMCG - non-food	Large Retail & QSR	Small Retail	Telecoms
Addressable TV	97	8	27	125	227	75	113	49	43
Audio	119	n/a	145	n/a	36	313	74	185	225
Broadcast TV	108	125	131	124	91	87	104	109	113
Cinema	300	n/a	155	n/a	76	n/a	377	524	637
Influencers	135	n/a	n/a	390	96	n/a	156	30	726
Online Display	61	n/a	117	218	61	252	62	182	5
Online Video	79	192	9	52	120	27	108	68	30
OOH	71	245	36	23	26	28	81	17	8
Paid Social – Meta	80	163	1	83	98	168	75	117	26
Paid Social – Other	140	313	n/a	n/a	44	16	185	170	125
Paid Social – TikTok	124	57	128	n/a	29	26	88	n/a	235
Print	145	431	142	n/a	n/a	197	138	164	224

Index vs sector avg — Below 60 | 60-89 | 90-110 | 111-160 | 160+

Automotive
Simple, impactful visual messaging sees very strong performance from lower attention channels (OOH & Print)

FMCG: Food vs Non-Food
Addressable TV and Audio are highly efficient, but vary sharply between food and non-food.

Broadcast TV
Consistently reliable: Broadcast TV hovers near the sector average in almost every category

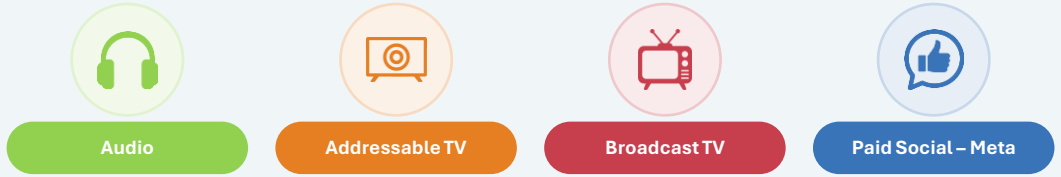
Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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The channels fall into three core groups

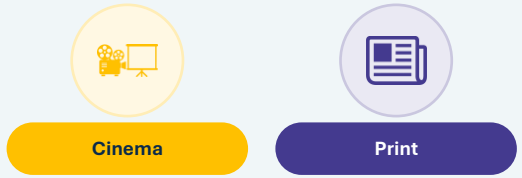
CONSISTENT SCALE CHAMPIONS

Channels that handle big budgets and drive the biggest uplifts in Ad Awareness



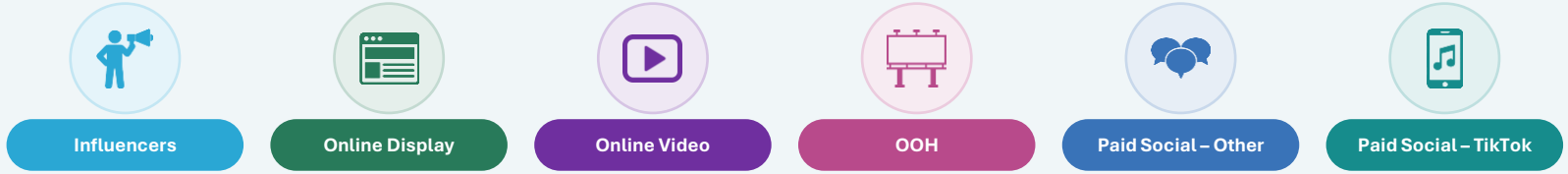
CONSISTENT EFFICIENCY CHAMPIONS

High impact channels that give top return per pound but saturate quickly



SECTOR CHAMPIONS

Channels that thrive when matched with the right product or audience



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Four channels – Addressable TV, Broadcast TV, Audio & Meta – deliver 69% of all ad awareness across all sectors

STRENGTHS

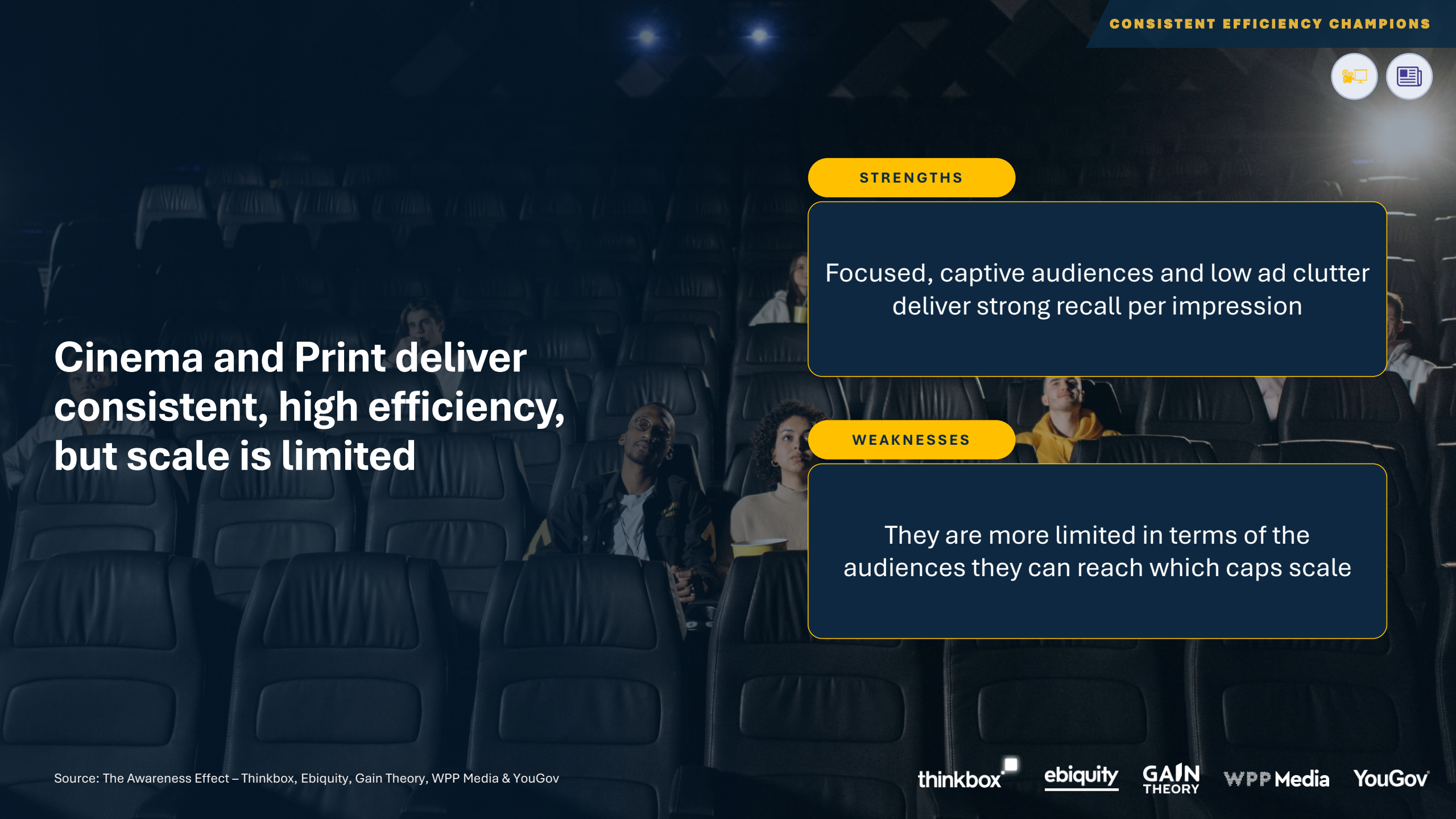
Access to a broad range of audiences and versatile formats let these channels absorb large budgets effectively

WEAKNESSES

Pushing hard for scale drives them up the diminishing returns curve, trading efficiency for volume

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Cinema and Print deliver consistent, high efficiency, but scale is limited

STRENGTHS

Focused, captive audiences and low ad clutter deliver strong recall per impression

WEAKNESSES

They are more limited in terms of the audiences they can reach which caps scale

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Online Display and OOH thrive where visual recognition is instant

STRENGTHS

Perform well in highly visual sectors such as Automotive or FMCG or with brands with strong visual identities

WEAKNESSES

Complex messages and detail get lost particularly impacting Finance and Telecoms

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

Influencers, TikTok & Social (Other) build Ad Awareness through community trust



STRENGTHS

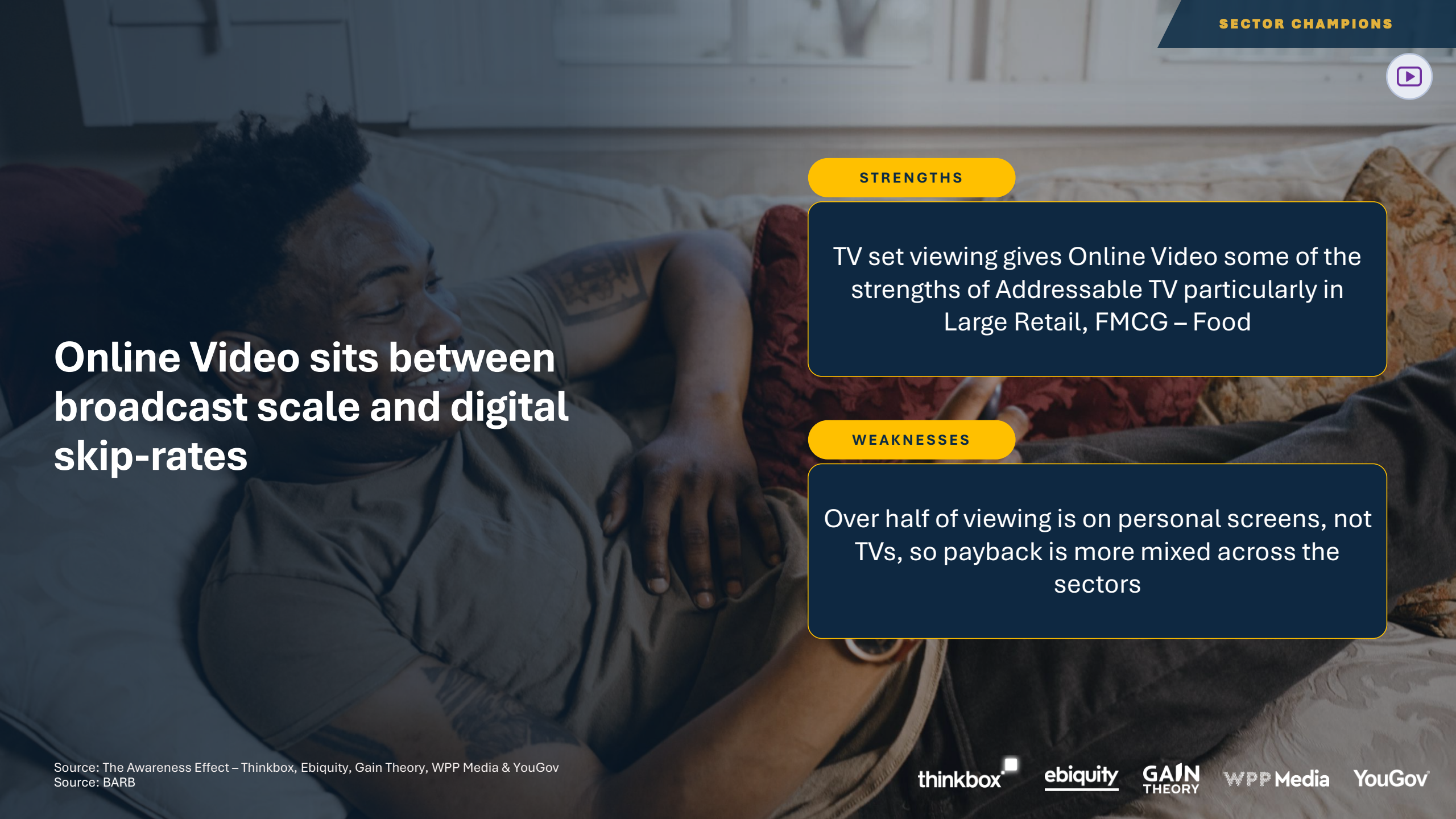
Above average Ad Awareness were ads tap into existing discussion & community – Telecoms & Automotive

WEAKNESSES

Skippable and muted formats mean it is difficult to gain traction where those conversations aren't present (FMCG)

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
Reddit Global Path to Purchase Study (Brainlabs/GWI), GWI Core, and Google 'Messy Middle' consumer journey clickstreams.

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Online Video sits between broadcast scale and digital skip-rates

STRENGTHS

TV set viewing gives Online Video some of the strengths of Addressable TV particularly in Large Retail, FMCG – Food

WEAKNESSES

Over half of viewing is on personal screens, not TVs, so payback is more mixed across the sectors

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
Source: BARB

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Rebalancing the media mix unlocks +30% more Ad Awareness for zero extra spend

CHANNEL	ACTUAL SPEND – PROFIT ABILITY 2	OPTIMISED – AD AWARENESS	
Audio	6%	10%	▲
Cinema	1%	7%	▲
Generic PPC	19%	8%	▼
Online Display	5%	4%	▼
Online Video	4%	3%	▼
OOH	5%	5%	–
Paid Social	13%	4%	▼
Print	3%	7%	▲
Total TV	44%	54%	▲

Ad awareness
Index vs actual average spend

100
actual

130
+30% vs actual

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
NB: Generic PPC is not modelled within the Ad Awareness models and therefore it has been allocated its optimal share based on optimising to short-term sales effects, remaining budget is then allocated to maximise ad awareness benefit. Based on £15m annual spend

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And also lifts short-term profitability

CHANNEL	ACTUAL SPEND – PROFIT ABILITY 2	OPTIMISED – AD AWARENESS	
Audio	6%	10%	▲
Cinema	1%	7%	▲
Generic PPC	19%	8%	▼
Online Display	5%	4%	▼
Online Video	4%	3%	▼
OOH	5%	5%	–
Paid Social	13%	4%	▼
Print	3%	7%	▲
Total TV	44%	54%	▲

Ad awareness Index vs actual average spend	100 actual	**130** +30% vs actual
Short-term profit Index vs actual average spend	100 actual	**107** +7% vs actual

Index vs actual plan = 100.

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
NB: Generic PPC is not modelled within the Ad Awareness models and therefore it has been allocated its optimal share based on optimising to short-term sales effects, remaining budget is then allocated to maximise ad awareness benefit. Based on £15m annual spend

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Maximising Ad Awareness means balancing **Scale & Efficiency**

Harvest early efficiency: Use Cinema and Print for high return, but cap spend before saturation

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Deploy heavy scale: Rely on Audio, Meta and TV when you need large lifts in Ad Awareness

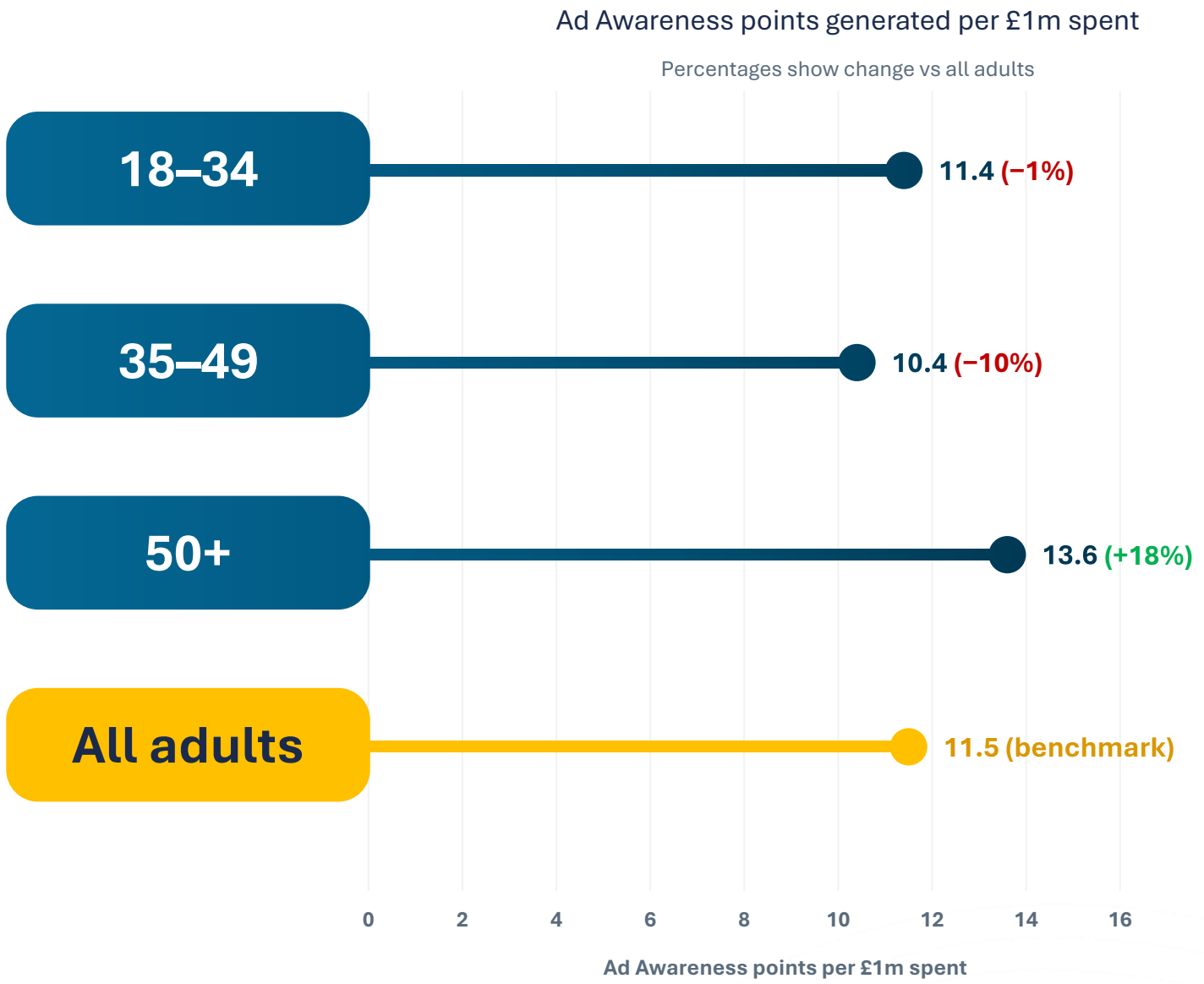
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Close the 30% gap: Reallocating channel mix drives significantly more Ad Awareness and lifts short-term profit



02. The overlooked middle

35–49s are surprisingly the hardest audience to drive Ad Awareness from



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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This age variance shows up in every category

Ad Awareness per £1m, indexed vs sector average (100 = sector average)

	Financial Services	FMCG – Drinks	FMCG – food	FMCG – non-food	Large Retail & QSR	Small Retail	Telecoms
18-34	38	235	117	74	60	52	60
35-49	43	129	114	100	64	69	48
50+	130	177	116	243	99	139	268

Index vs sector avg — Below 60 | 60–89 | 90–110 | 111–160 | 160+

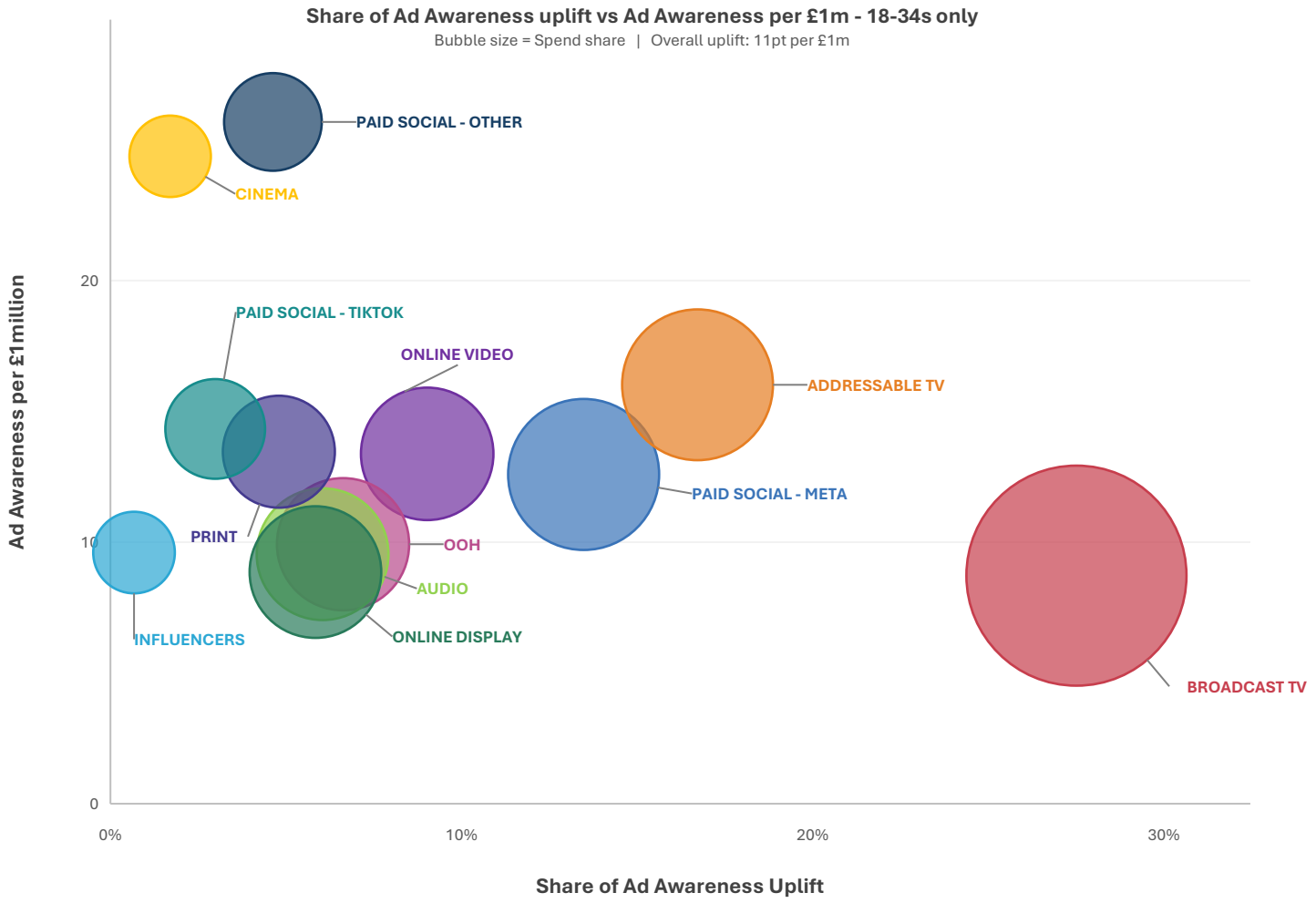
18–34
Strongest in FMCG Food & Drink; weakest in Financial Services

35–49
Lowest efficiency in half of all sectors (notably Telecoms)

50+
Outperforms average in 6 of 7 sectors, peaking in Telecoms

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

For 18–34s, Addressable TV leads video impact while Cinema and niche social thrive



Efficient on-demand

Addressable TV and **Online Video** are the most efficient video format

Traditional scale

Broadcast TV still makes the largest contribution to total awareness. Meta still beats TikTok on volume, OOH over-indexes

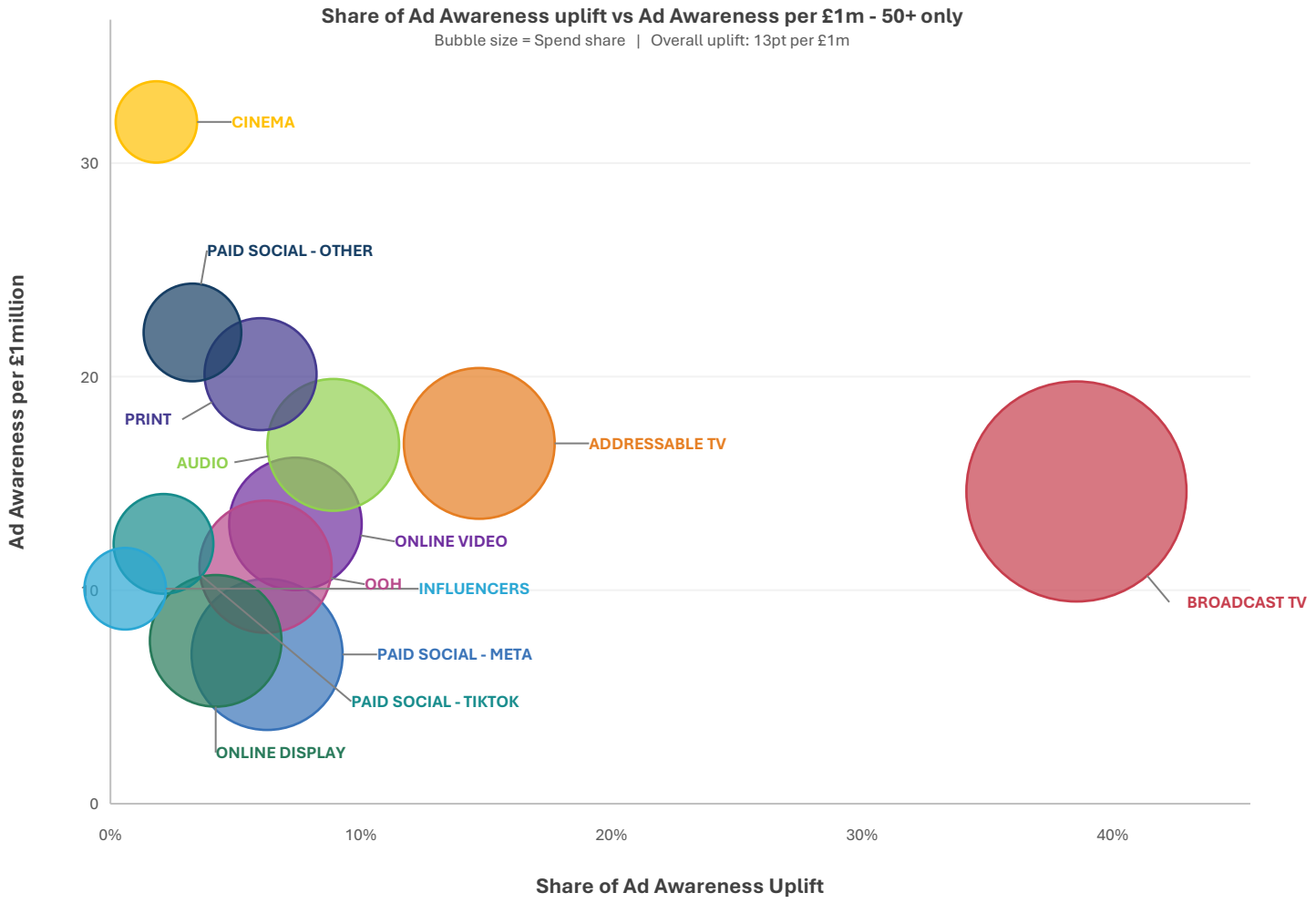
Ads that aren't ads

Influencers show low effectiveness despite strong commercial impact – a feature not a bug to not be seen as advertising

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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For 50+, Broadcast TV and Print dominate but Addressable TV delivers real scale



Unsurprising broadcast dominance

Broadcast TV delivers the largest share of awareness for 50+ audiences

Not all about offline

Addressable TV, Online Video & Paid Social - Other all perform well for the oldest group

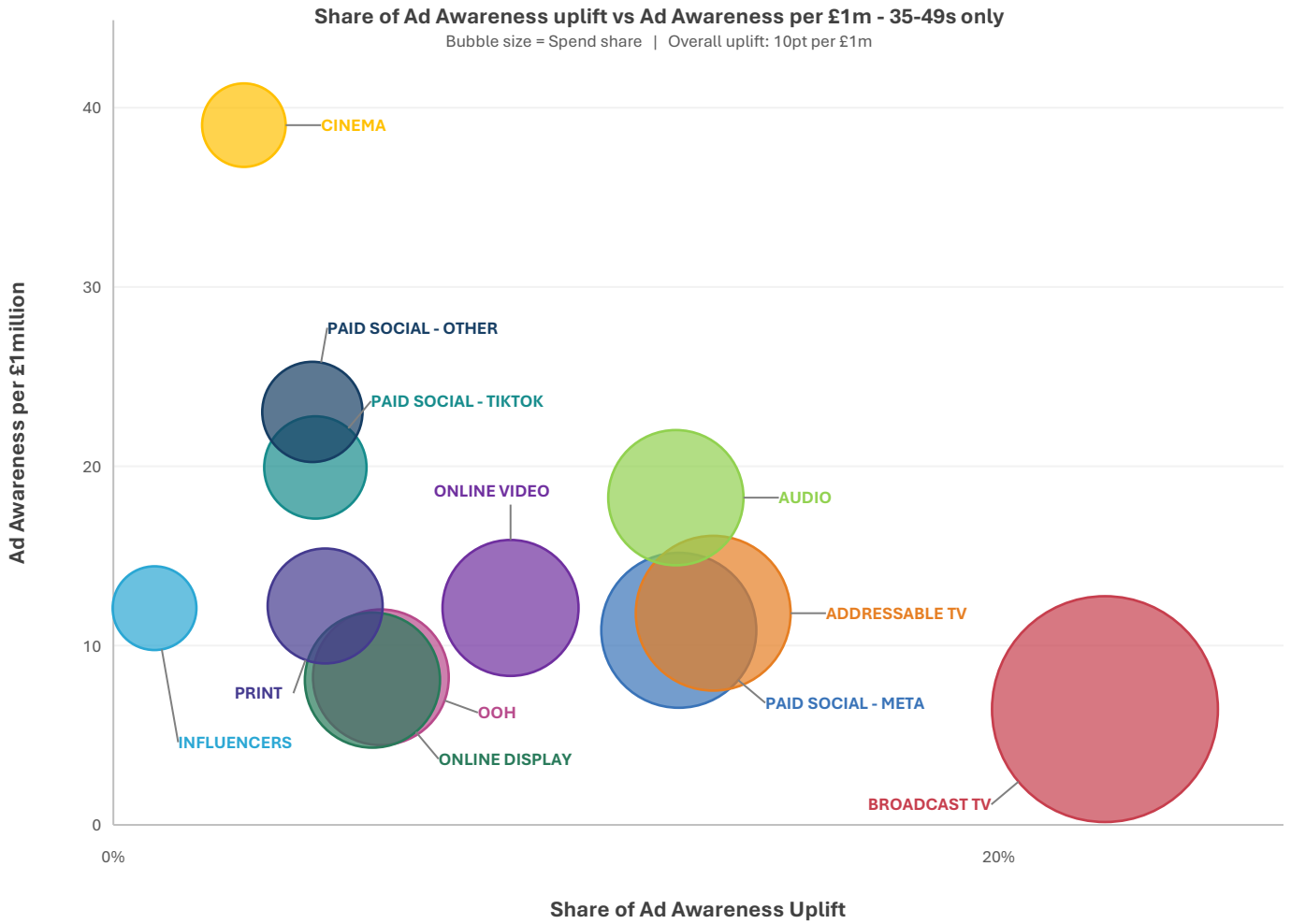
A clear efficiency contrast

Audio and **Print** are efficient.
Almost all forms of **Paid Social** including **Influencers** struggle

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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For 35–49s, Broadcast TV efficiency drops off while Addressable, Audio, and TikTok surge



On-demand first behaviour

Addressable TV delivers nearly twice the awareness per pound of **Broadcast TV**

Broadcast still brings scale

Broadcast TV delivers the most awareness but delta to addressable is smaller than other groups

Efficient stand-outs

Audio, Cinema and **TikTok** offer stand out performance compared to other channels

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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35-49s are critical as they are the chief purchasing officers of the economy



66%

FULL-TIME EARNERS

£55k+

HIGHEST EARNERS

65%

MULTI-PERSON BASKETS

74%

QUALITY OVER PRICE

Source: WPP Audience Origin

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But the ‘rush hour of life’ puts pressure on their media consumption



1 in 5

UNDER 1 HOUR WEEKDAY FREE TIME



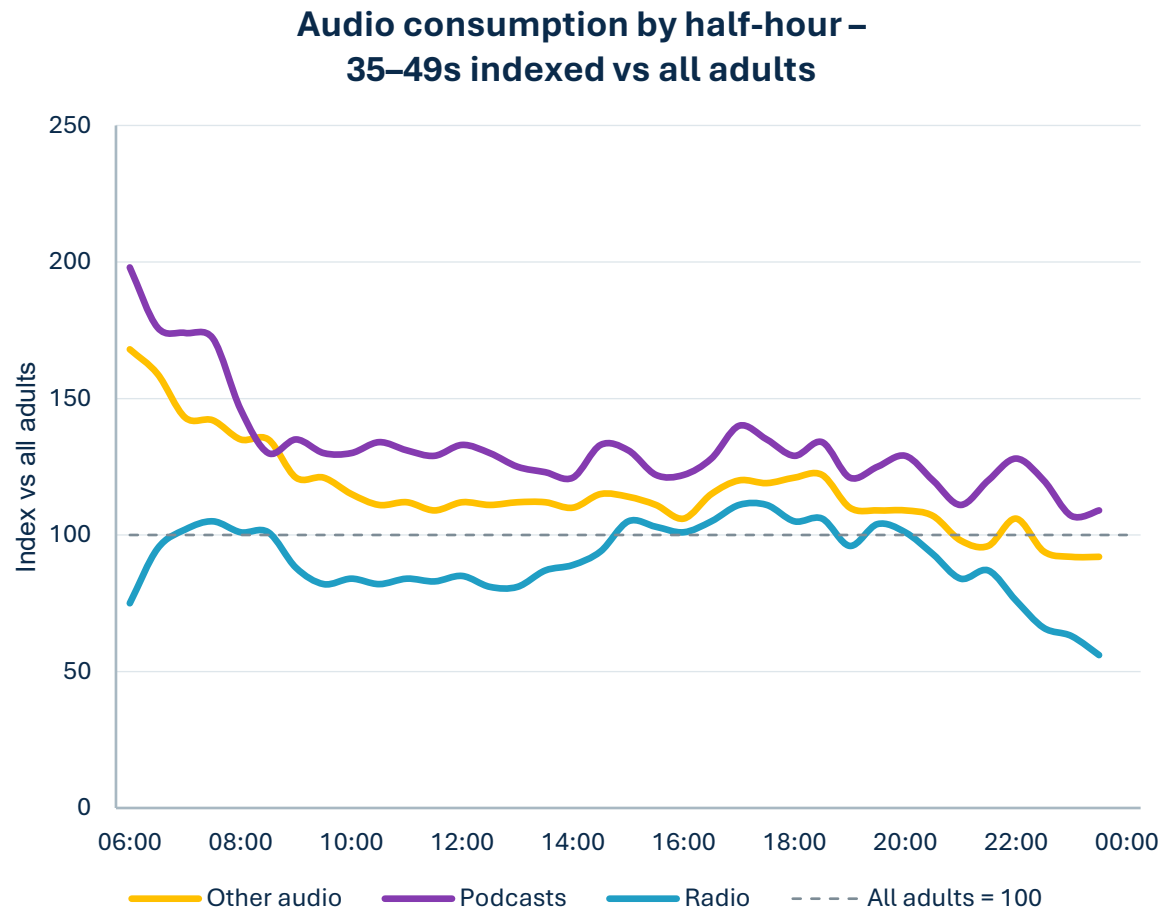
2×

STREAMING PREFERENCE VS 50+

Source: WPP Audience Origin, YouGov Profiles

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Audio fills the **daytime gaps** when screens can't reach them



Approximate values redrawn from the supplied chart; 06:00–23:30 observations.

Source: IPA Touchpoints

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35-49s didn't adapt to digital – they grew up with it



Not Exhaustive – UK launch dates

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Treating 35–49s as ‘generic older adults’ leaves Ad Awareness on the table

CHANNEL	OPTIMISED FOR 50+	OPTIMISED FOR 35–49
Addressable TV	17.0%	22.9%
Audio	12.3%	14.0%
Broadcast TV	41.4%	24.7%
Cinema	3.0%	3.0%
Influencers	0.2%	3.4%
Online Display	4.0%	4.0%
Online Video	6.0%	6.0%
OOH	6.0%	6.0%
Paid Social - Meta	2.0%	6.0%
Paid Social - Other	2.5%	3.0%
Paid Social - TikTok	1.5%	3.0%
Print	4.0%	4.0%
Total ad awareness lift: 35–49	**+5.64 pp**	**+6.10 pp**

Optimising to 50+ reduces ad awareness contribution for 35-49s by 7%

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
The Growth Gap – WPP Media UK
NB: Generic PPC is not modelled within the Ad Awareness models and therefore it has been allocated its optimal share based on optimising to short-term sales effects, remaining budget is then allocated to maximise ad awareness benefit. Based on 8 week campaign at £2m

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Age is a **more than a number**, it significantly impacts ad awareness

One size doesn't fit all: Age fundamentally changes which channels generate awareness

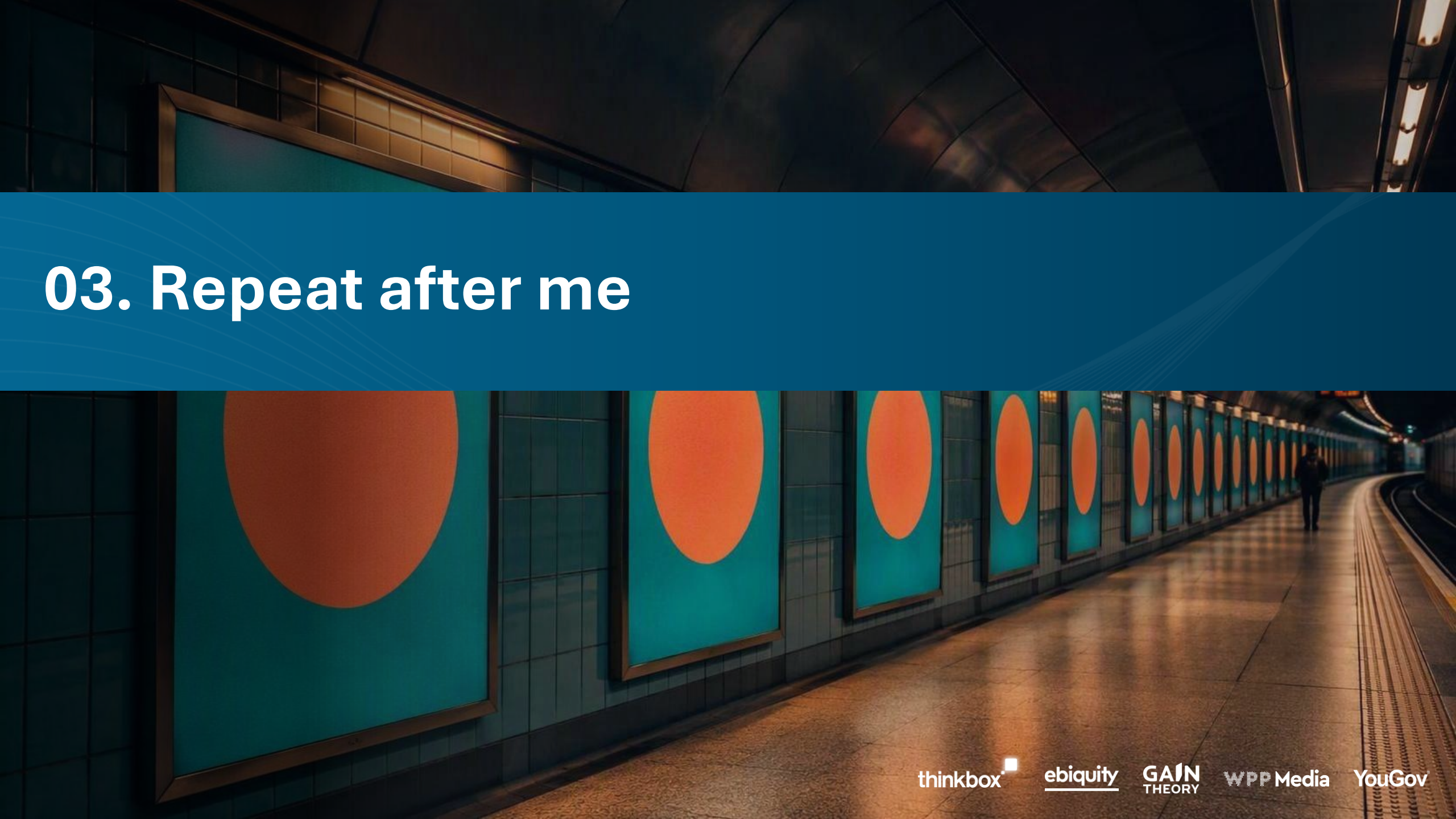
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Expect the unexpected: 18–34s and 50+ have distinct counter-intuitive winners like Cinema and Addressable TV

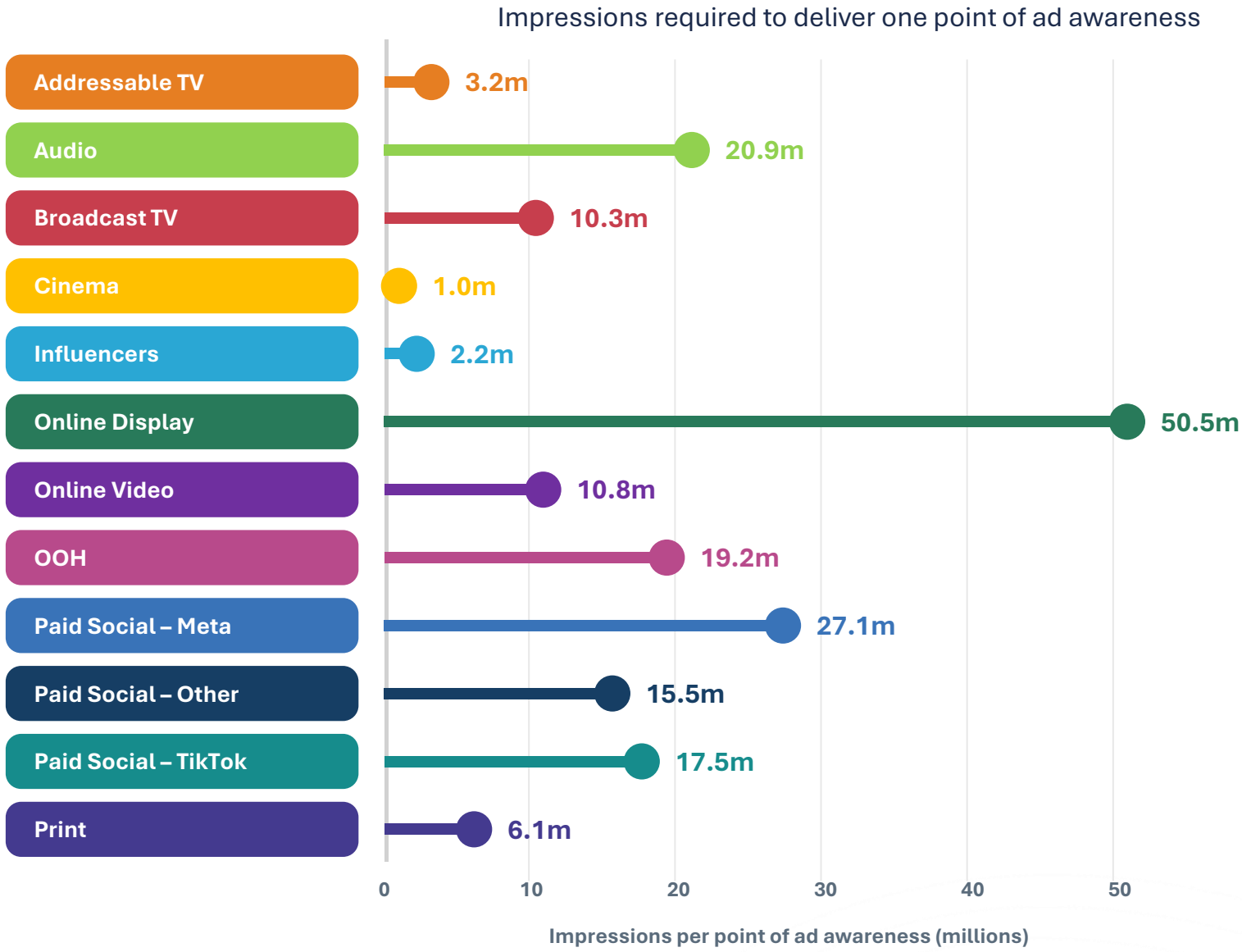
Don't overlook the middle: 35–49s are the hardest to reach, but screenless audio and on-demand video break through

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03. Repeat after me



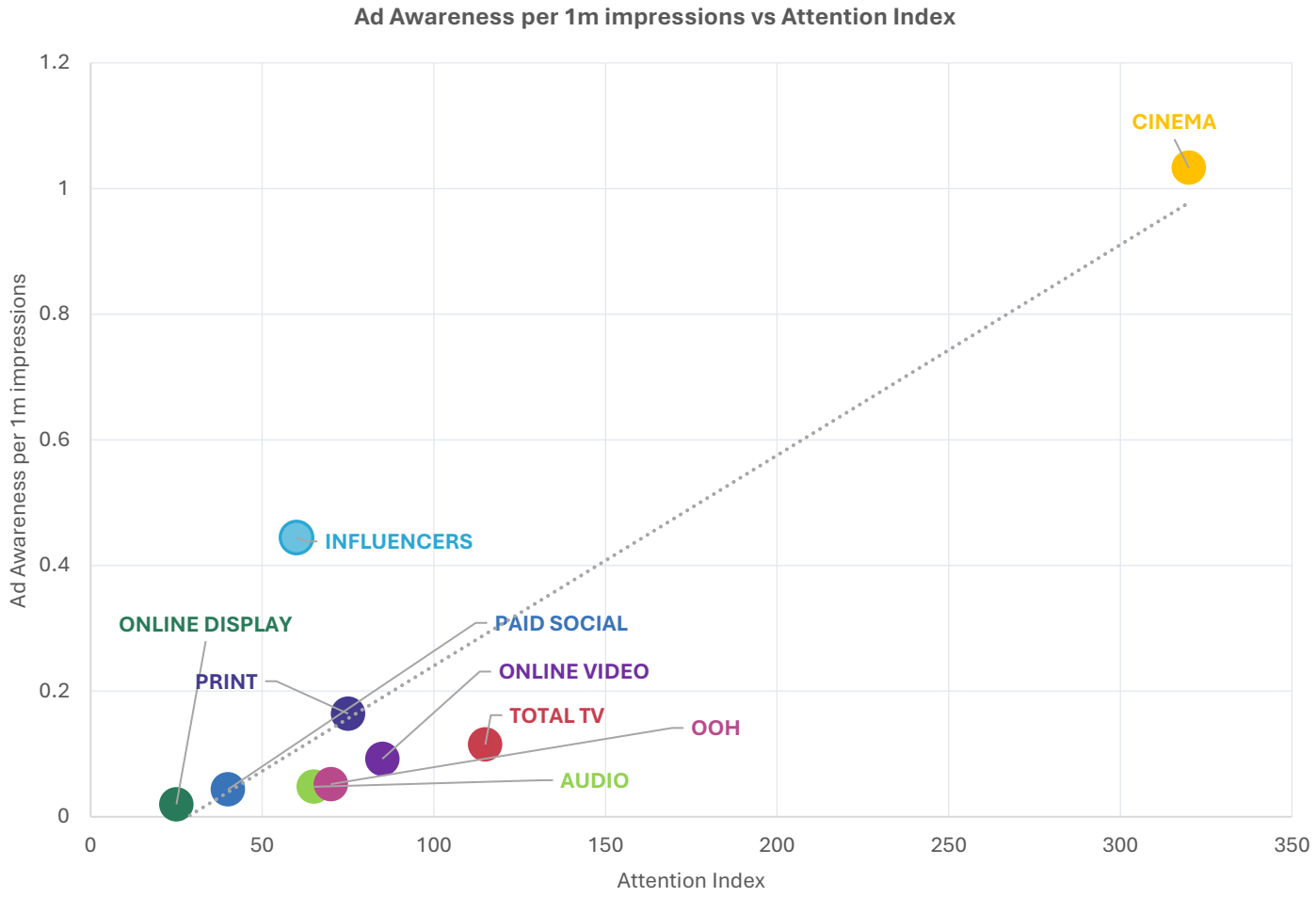
Not all impressions are created equal – some work 50× harder than others



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov

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Three factors influence effectiveness per impression



Attention – 86%

Attention and effectiveness directly correlate. Cinema is the standout

Trust – 11%

Trusted platforms over-perform boosting TV & Print relative to social

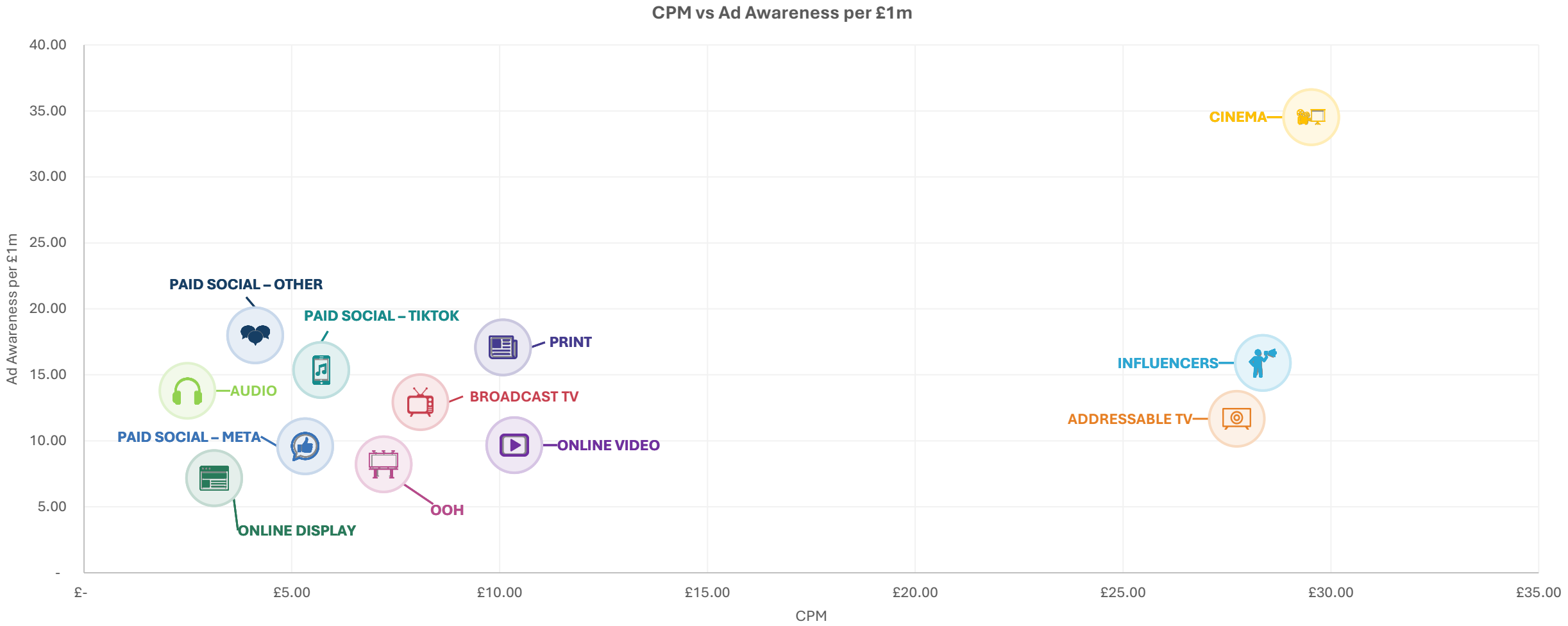
Dislike of Ads – 3%

Dislike of ad placement supresses performance – particularly in Online video

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
Listen Up! – System 1 & Radiocentre, Maximising profit through attention – Lumen & Ebiquity, Common Ground – WPP Media

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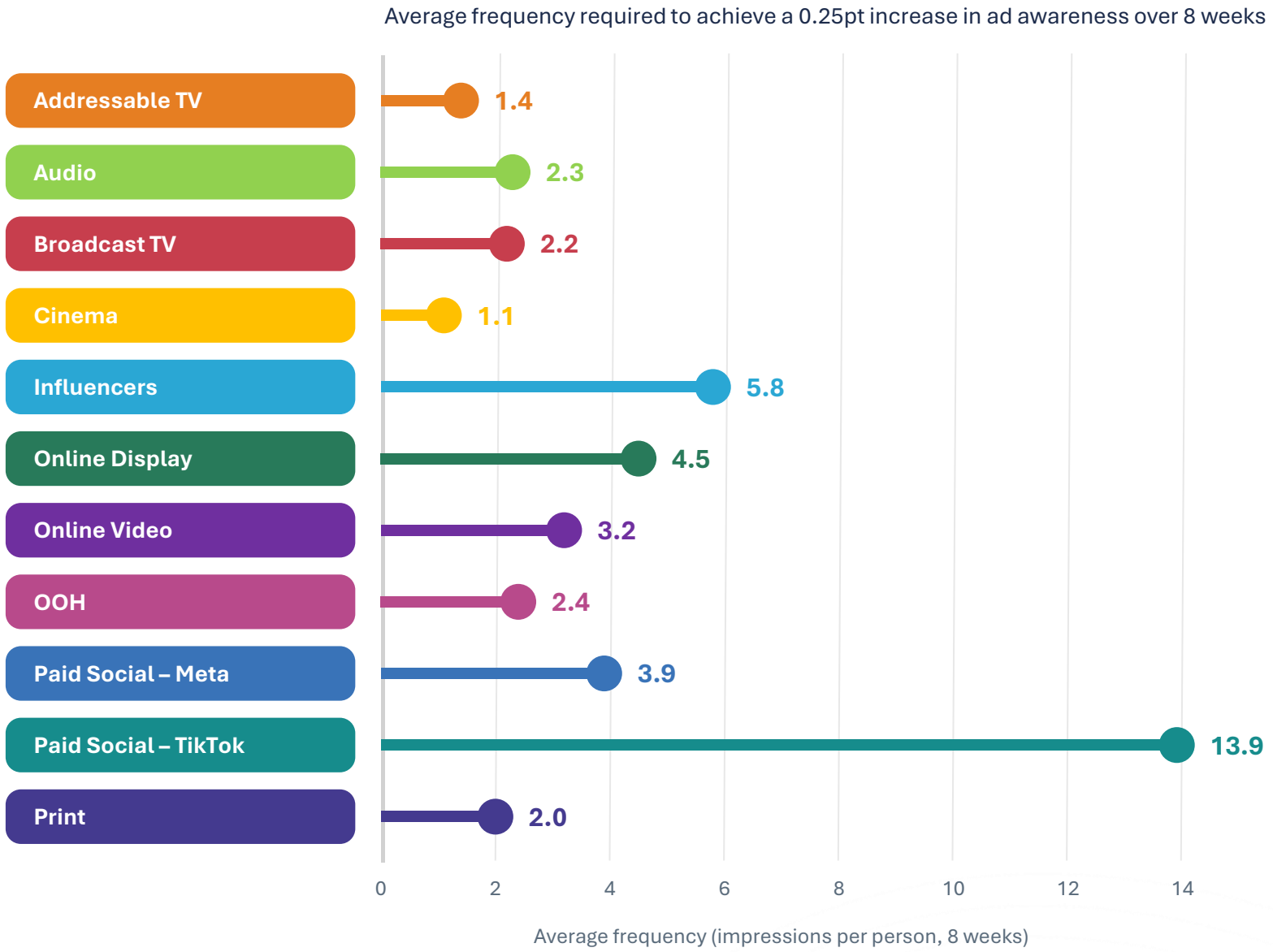
Higher CPM across channels usually earn their keep



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
WPP Benchmarks

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Lower attention channels demand significantly higher frequency to drive the same lift



Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
WPP Media Campaign Strategies, WPP Media Audience Origin
Assumes 8 week campaign period with flat delivery by week

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Cross channel frequency isn't as important as in-channel frequency

CHANNEL	PLAN A: OPTIMISE TO AD AWARENESS BUT KEEP CHANNEL TO CHANNEL FREQUENCY CONSISTENCY	PLAN B: OPTIMISE TO AD AWARENESS & ALLOW HIGH VARIATION IN CHANNEL TO CHANNEL FREQUENCY
Addressable TV	1.5×	1.4×
Audio	3.1×	3.8×
Broadcast TV	2.9×	4.9×
Cinema	1.2×	1.2×
Influencers	2.3×	2.0×
Online Display	3.1×	2.7×
Online Video	2.7×	2.6×
OOH	3.0×	1.9×
Paid Social - Meta	2.9×	2.0×
Paid Social - Other	2.7×	2.4×
Paid Social - TikTok	2.7×	1.3×
Print	2.4×	2.4×
Campaign average frequency	6.39×	6.39×
Ad awareness lift	+4.59 pp	+5.39 pp

Source: The Awareness Effect – Thinkbox, Ebiquity, Gain Theory, WPP Media & YouGov
WPP Media Campaign Strategies, WPP Media Audience Origin. Based on optimal spend allocation to achieve ad awareness uplift overall for an 8 week period capped at practical maximum frequency levels by channel

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Impressions are **not interchangeable** – strength of impact dictates frequency

Attention drives impact: 86% of an impression's awareness power comes down to sheer attention

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Channel price reflects payback: High CPM channels justify their cost by delivering higher recall per contact

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Tailor your frequency: Set specific frequency caps per channel rather than relying on a blunt cross-media average



The three **Golden Rules** to maximise **Ad Awareness**

Scale & efficiency come from different channels – nothing does both. Effective balancing unlocks 30% growth

Different channels play more prominent roles at different points of people's lives – beware the 'generic old' trap

Impressions are not interchangeable and neither is frequency – in-channel frequency is more critical than cross-channel frequency



The Awareness Effect

How ad awareness unlocks everything else

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