

INNOVATING TO IMPACT

dentsu

THE BRAND RESET

**CAPTURING SALES AND
BRAND EQUITY FROM
ATTENTION**

AN INDUSTRY-FIRST STUDY



FOREWORD

Brand advertising has always had the power to deliver on long-term sales while also having a short-term sales impact. However, recent years have seen businesses join an industry-wide race to the bottom, commoditizing attention in pursuit of short-term clicks and cheap impressions. Successfully capitalizing on attention has been associated with moving fast, keeping up and instant wins.

Now is the time for a brand reset. To slow the frenzy, reclaim brand building and deliver longer-term outcomes.

While marketers intuitively recognize that brand building captures attention and is critical in creating long-term demand, storytelling often falls short in front of CFOs and board members where performance-driven investments feel like a safer bet and too often take precedence.

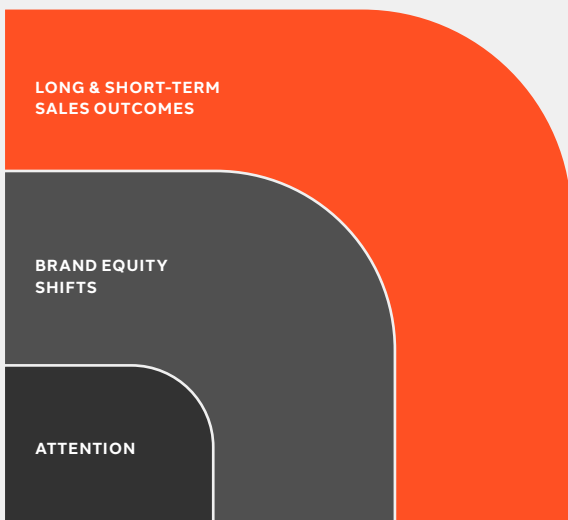
Here at dentsu, we are establishing a quantifiable framework that helps marketers prove the ROI of their brand-building investments.

This industry-critical, industry-first research study offers insights and evidence-backed direction to drive this agenda forward with the rest of the business and **reset your brand.**



Will Swayne

Global Practice President,
Media and Integrated Solutions,
dentsu



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EXECUTIVE SUMMARY

For brands striving for sustainable growth through video - the era of solely focusing on short-term results through cheap clicks and performance outcomes is over.

While these metrics appease the need to demonstrate immediate impact, marketers recognize that they chronically overlook advertising's fundamental power - the ability to build brands in the long term.

And yet, until now, as an industry, we've lacked the evidence base and frameworks to leverage attention for the long term.

The Brand Reset is the industry's largest video dataset and first study linking attention to both brand equity and sales. Designed by dentsu in partnership with Kantar and Lumen, this study offers evidence-backed hypotheses that provide marketers with the insights and quantitative proof points to give budget holders the confidence to invest in long-term demand creation and brand building.

Drawing on ten of the world's biggest next-gen platforms as well as Linear TV, the study exists to answer media planning's most pressing strategic challenge: **how does today's digital media environment deliver short- and long-term effects? And how can we balance those effects to deliver outcomes in the age of the algorithm?**

HEADLINE REVEALS:

1. **Digital video (including short-form formats) delivers multi-year brand building effects** - directly challenging the widely held assumption that Linear TV is the only channel capable of driving long-term growth.
2. **Connected TV has the power to build brands on par with Linear TV** - this marks an important structural change in the media landscape that reflects how audience behavior has evolved and upends the perceived superiority of Linear TV.
3. **Second for second - voluntary attention works harder than forced attention** - while skippable formats have lower impact when viewed for one to two seconds, their impact surpasses non-skippables if attention is sustained, i.e., people choose to watch the ad instead of moving on, or away from it.
4. **Attention matters but doesn't have to be continuous** - more attention reaps greater brand-building effects. However, after 20 seconds attention delivers little additional impact, which calls into question the assumption that more attention is always better.

HOW THIS STUDY WILL ENABLE YOU TO TRANSFORM YOUR BUSINESS TODAY:

- *The Brand Reset* **provides quantifiable principles** to enable you to shine a light on the importance and power of bringing brand back into focus when making a case for your investments.
- The extensive dataset at the heart of this study **fuels existing dentsu planning tools** - providing more depth and more data particularly around brand metrics.
- Marketers will benefit from **enriched and more rounded funnel planning** within their teams while planners benefit from access to this dataset to deliver media scenarios.

***The Brand Reset* builds on dentsu's track record of turning signals into industry-first scalable frameworks that help marketers enrich their knowledge of attention and future-proof the soundness of their investments.**

The Attention Economy (2018), demonstrated the relationship between attention and short-term sales effects, *The Brand Reset* (2026) shows how attention drives long-term sales effects. This study combines **Lumen's** definitive attention data, **Kantar's** decades of expertise in pre-testing, brand tracking and financial performance and expert commentary from industry pioneer, author, professor and marketing consultant Les Binet who wrote the rule book on attention and the bottom line.

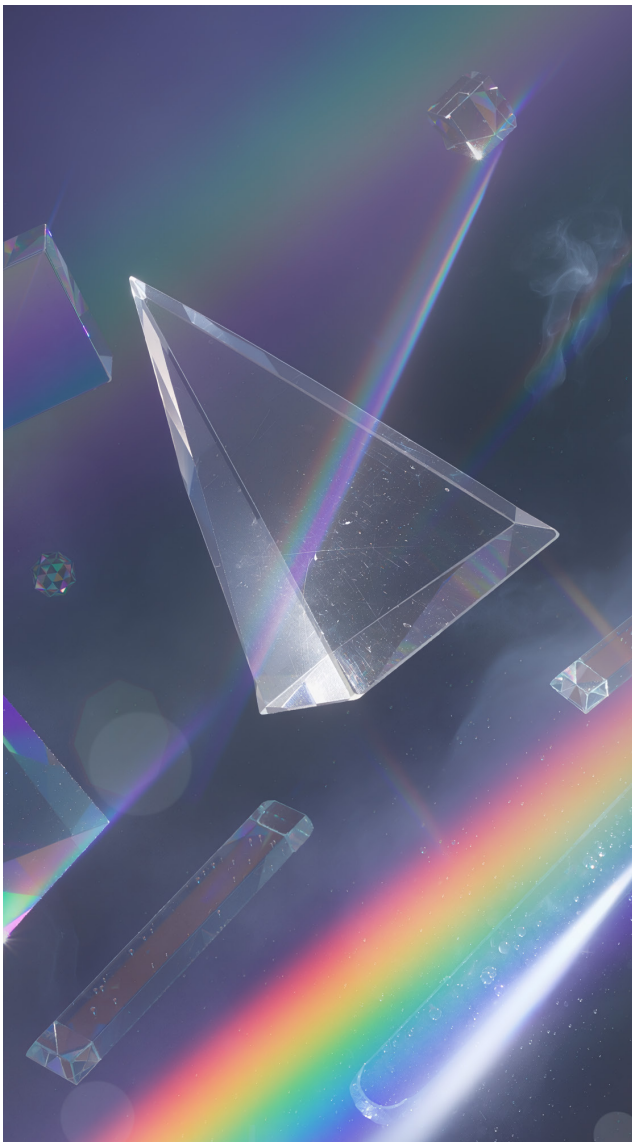


THE MARKETER'S CHALLENGE

THE STATUS QUO

THE DOOM LOOP

The advertising industry is grappling with how to balance short-term performance with long-term brand building. The focus has been on instant-gratification results giving rise to a doom loop.¹ Relentless optimization for clicks and conversions has diminished the effectiveness of ads while eroding brand trust. In order to secure budgets, marketers have had to default to short-term investments which can be more immediately quantified.



THE PROBLEM

A LACK OF TOOLS TO DRIVE A BRAND-BUILDING AGENDA

Marketers understand that while performance is important, it should not come at the expense of brand but they lack the evidence, frameworks and tools to drive this agenda.

THE RESPONSE

TO RECLAIM DEMAND CREATION AND THE POWER OF BRAND EQUITY

The industry's intense focus on performance has neglected advertising's core long-term mechanisms: the power to build brand equity, embed lasting memory structures and increase price elasticity to ultimately secure predictable, sustained financial performance.

Achieving these results requires continued and effective investment to avoid the **silent killer**² risk of a slow decline in brand value.



THE NEED

NEW EVIDENCE, TOOLS AND METHODOLOGIES TO MEASURE OUTCOMES AND ONBOARD TEAMS WITH CONFIDENCE

Marketers need tools to make the case for investing in their brand assets backed by data and actionable insights.

THE RESPONSE

THIS BRAND RESET STUDY

A dataset and suite of actionable insights that until now were missing in industry is brought to you by dentsu in collaboration with Kantar and Lumen. *The Brand Reset* updates planning principles to shine a light on the importance and power of bringing brand back into focus. The extensive dataset at the heart of this study fuels existing planning tools - providing more depth and more data particularly around brand metrics.

THE RESULT

A MARKETING TEAM EQUIPPED TO BALANCE SHORT-TERM SALES PERFORMANCE WITH LONG-TERM BRAND EQUITY

Marketers will benefit from enriched and more rounded funnel planning within their teams while planners benefit from access to this dataset to deliver media scenarios.



LET'S BREAK IT DOWN

Media platforms have leveraged algorithms to massify video content and drive viewership through endless scrolled, swiped and skipped personalized feeds.

The algorithm has helped us automate and optimize content discovery for audiences based on previous behaviors and individual preferences.

More of our daily viewing minutes are spent with next-gen video platforms than live TV, but success is only being measured in short-term metrics.

Video is a brand-building vehicle but until now the industry has lacked clear guidance on how video formats in these new feeds and environments contribute to brand building - and how to optimize it.

This will require quickly moving past what have become table stakes (like moving beyond the outdated distinctions of TV vs. digital, or short form vs. long form) and understanding which levers to pull to navigate platform algorithms and maximize campaign effectiveness.

To understand how video formats contribute to brand building, planning expertise needs to evolve and embrace new frameworks for evaluating media and creative on its ability to deliver **high quality of exposure**. This is defined differently for creative and media.

For creative: quality of exposure entails advertising that will build distinction by eliciting emotions and capitalizing on culture to capture and sustain people's attention. Successful campaign delivery will require alignment between creative production and platform algorithm requirements to ensure ads are recalled when the brand signals match.

For media: quality of exposure in media means planning for attention, delivering ads in brand-safe, trusted environments that feel relevant to the audience, and giving them time to notice and process them. It also means thinking beyond campaigns, embracing a longer-term approach to buying that allows for liquidity amongst platforms and the ability to reach the right (and previously excluded) audiences.

Right now, marketers are in urgent need of a quantitative framework to substantiate the understanding that long-term brand building through high quality exposure is more critical than ever. If we don't act now, we risk the continued erosion of brand equity across the industry.

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At Snapchat, we've partnered with dentsu for several years to explore the Attention Economy, demonstrating how innovative Snapchat formats — like full-screen mobile video and AR Lenses — outperform dentsu benchmarks on attention and brand outcomes.

We're excited to be part of the next phase of this work, *The Brand Reset*, which tackles one of marketers' most pressing challenges: balancing short- and long-term objectives.

As part of this industry-first study on the sales impact of attention, we look forward to uncovering how advertisers can best leverage Snapchat to drive both immediate and sustained results.

ADRIAN MULRYAN

VP of Global Agency & Strategic Accounts
Snapchat



THE BRAND RESET

***The Brand Reset* answers the call with a groundbreaking industry-first research study linking attention to both brand equity and sales.**

We've created the industry's first and largest video dataset connecting attention to brand equity and long-term brand outcomes. *The Brand Reset* goes beyond merely proving that attention drives long-term sales, it provides indicative hypotheses and *actionable blueprints* for planners and clients to win in the Algorithmic Era.

***The Brand Reset* study:**

- Demystifies how different platforms and formats are influencing brand-building and memory formation.
- Establishes the relationship between impressions, attention and long-term brand building.

- Demonstrates how different types of attention, applied across various formats, support specific brand-building tasks.
- Determines how major next-gen video platforms can build brands and long-term sales, above and beyond their short-term effects.

The Brand Reset also measures the short-term sales impact of brand ads, giving brands the reassurance they need to invest in brand-building strategies while ensuring that performance goals are still being met, essential for the 43% of CMOs who tell us they are struggling to measure the efficiency of next-gen video formats.³

Whether your strategic challenge is maximizing top-of-funnel awareness, driving deeper consideration, or achieving critical brand differentiation, *The Brand Reset* study empowers you to plan smarter, proving the true value of every quality impression.

HOW WE'VE DONE IT

The Brand Reset involved one of the biggest advertising effectiveness studies ever conducted

10 

10 next-gen media platforms that deliver video advertising and Linear TV



Creative content designed for brand building



US & UK REACH



20 brands
9 verticals

40,000 

respondents – all users of whichever media platform was being tested

3,600 / 

respondents per platform – 2,600 exposed; 1,000 unexposed

60 / 

60 ads per platform – all best practice creatives, approved by the respective platform



Passive measurement of visual attention plus brand metric survey after exposure

At dentsu, we have a proven track record of anticipating future needs and turning those signals into scalable frameworks that marketers can implement to demonstrate and future-proof the soundness of your investments.

In 2018 we launched an industry-first approach and thought leadership series, the *Attention Economy*. The initiative developed an unparalleled understanding of how to deliver best-in-class results on short-term metrics. A new framework for performance in the Precision Era was developed next. Now, the Algorithmic Era requires a fresh approach and framework for demand creation generated through brand building. And here it is.

We've combined Lumen's definitive attention data with Kantar's decades of expertise in pre-testing, brand tracking and financial performance, rooted in their Meaningful Different and Salient (MDS) framework,

alongside expert guidance from Dan White, brand and media research veteran and architect of the BRANDZ brand equity approach. Industry pioneer, author, professor and marketing consultant Les Binet was consulted to validate and reaffirm the quality of the findings.

Our analysis is underpinned by a dataset broken down into second-by-second effectiveness, allowing us to understand precisely when and where brand impact is generated by video formats. This level of granularity enables more informed planning decisions, arming marketers with the knowledge required to fully unlock the power of attention.

For the first time in the industry's history, we can therefore now quantify the combined effects of attention, brand building, and activation. And this will have a tangible, positive impact on media investment across the full funnel.

”

***The Brand Reset* data confirms what we've long advocated: the value of high-attention environments.**

It provides definitive proof that digital video—even in shorter formats—delivers multi-year brand building effects that were once thought exclusive to traditional broadcast.

By linking attention directly to brand equity, we are proving that every quality digital impression contributes to a brand's sustained resilience.

NEALA BROWN

SVP, Commercial Strategy & Advanced Advertising Solutions
Teads

FIVE ACTIONABLE INSIGHTS FROM THE BRAND RESET

We've honed in on five key insights from *The Brand Reset* which strengthen existing bodies of knowledge in the field but offer an industry-first focus by measuring outcomes through the lens of attention. This is also the first study to measure brand equity at the format level in next-gen video.

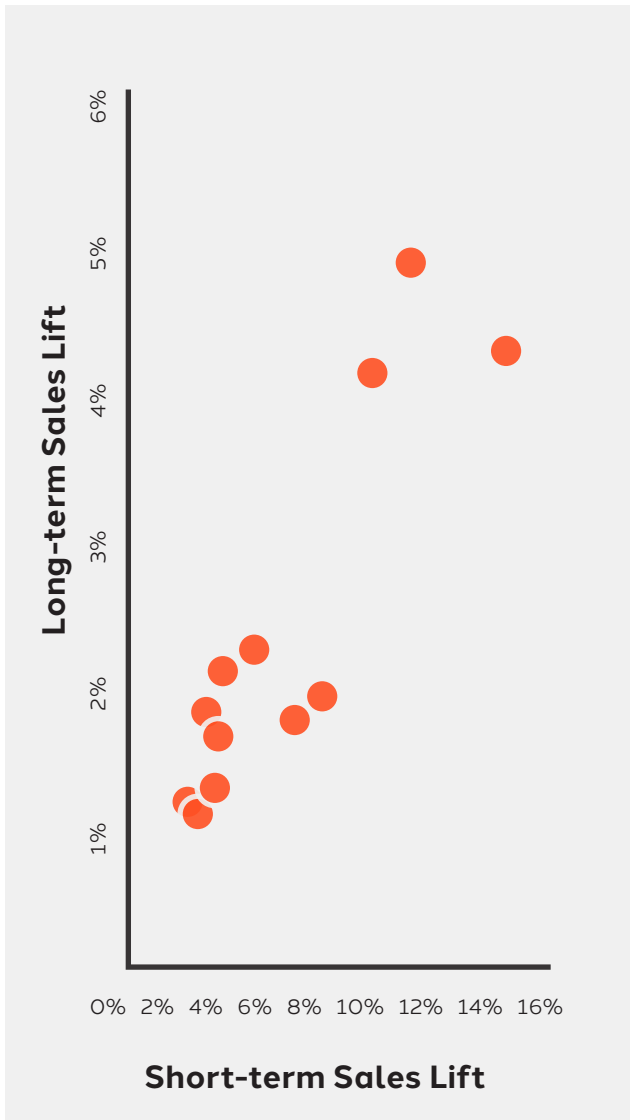
DIGITAL VIDEO (INCLUDING SHORT-FORM FORMATS) DELIVERS MULTI-YEAR BRAND BUILDING EFFECTS

A SINGLE EXPOSURE HAS THE POTENTIAL TO RESULT IN LONG-TERM BRAND BUILDING

CONNECTED TV HAS THE POWER TO BUILD BRANDS ON PAR WITH LINEAR TV

SECOND FOR SECOND - VOLUNTARY ATTENTION WORKS HARDER THAN FORCED ATTENTION

ATTENTION MATTERS BUT DOESN'T HAVE TO BE CONTINUOUS



INSIGHT 02

A SINGLE EXPOSURE HAS THE POTENTIAL TO RESULT IN LONG-TERM BRAND BUILDING

Based on Kantar's algorithms, a single exposure on these platforms and formats is projected to generate between 1% and 5% more sales in the long term (over the next three years) compared to no exposure. In addition, each exposure has a short-term effect (spanning three months) of between 2% and 15%.⁴

Investing in advertising designed to build brand equity is a win-win helping to deliver long-term growth while boosting short-term sales in the interim. Les Binet has been measuring the effects of advertising on sales for decades and agrees that this finding aligns well with established work on audiovisual memory formation, long-run econometric evidence on video advertising, and the emotional and associative power of moving images plus sound.⁵

ACTION FOR PLANNERS

Scenario planning is essential in delivering the right combination of platforms. Is your business missing out on sales left on the table due to underinvestment in the long-term after effects of video?

CONSIDERATIONS FOR PLANNERS

Estimated increased spend is indicative and will vary by category. Current figures have been calculated as an average across several categories. Format influences performance, impact varies by audience and cost per exposure varies by platform.

INSIGHT 03

CONNECTED TV HAS THE POWER TO BUILD BRANDS ON PAR WITH LINEAR TV

In dentsu's recent *CMO Navigator – Media Edition*, 49% of global marketing leaders said that they find it challenging to assess whether new video formats like Connected TV (CTV) can deliver as effectively as Linear TV.⁶

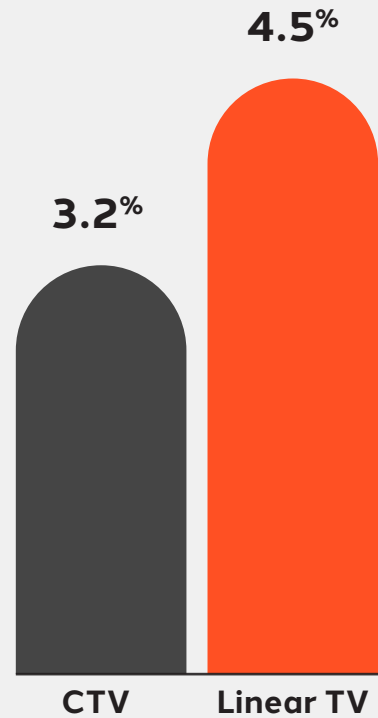
The *Brand Reset* study has found that CTV nearly matches Linear TV's effectiveness, which marks an important structural change in the media landscape: Connected TV platforms deliver a 3.21% long-term sales lift, compared with 4.43% for Linear TV.

For years, the perceived superiority of Linear TV has been grounded in its ability to deliver high attention, high quality exposures. Modern CTV environments now deliver nearly equivalent long-term brand effects, and this greatly reflects how audience behavior has evolved.

Consumers are increasingly consuming longform content through streaming platforms while major sporting competitions, awards shows and cultural moments are moving to CTV in major markets. Formats are being built and planned with a new mindset around Linear vs. CTV (or a combination of the two).

In addition, the fact that one CTV platform comes close to matching Linear TV's results indicates that some streaming environments have reached a high level of advertising product maturity capable of supporting that sustained brand building, not just short-term performance.

LONG-TERM SALES LIFT



ACTION FOR PLANNERS

The dataset highlights a meaningful shift in how we think about long-form video and the role CTV can play in delivering long-term brand outcomes within modern media plans.

CONSIDERATIONS FOR PLANNERS

While CTV is delivering more than it used to, Linear TV is still guaranteeing high brand effects.

INSIGHT 04

SECOND BY SECOND - VOLUNTARY ATTENTION WORKS HARDER THAN FORCED ATTENTION

The Brand Reset study has found that advertising on skippable formats that succeeds in holding attention can have a huge brand-building effect if attention is sustained. While skippable formats have lower impact, when viewed for one to two seconds their impact surpasses non-skippable ones.

Non-skippable ads, where the ad plays in full before the viewer can see the next piece of content (this is referred to as forced attention) generally have the sound on, are watched for longer, and deliver impact even at low levels

of visual attention, but only slightly, if people view the ad for longer. They also cost more per impression than skippable formats.

Skippable formats, with various sound settings, give consumers agency over how long they view an ad, ergo, if people watch a skippable ad for longer, they are giving it attention voluntarily. This voluntary attention lives in the same space as earned attention and is where brand equity is built.

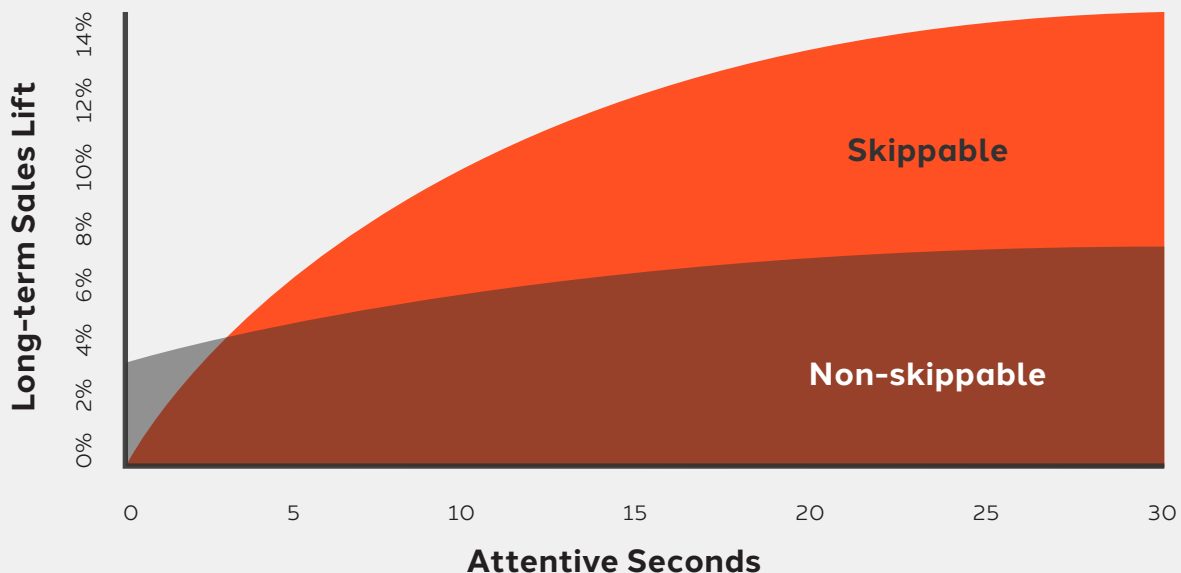
This insight reframes planning from traditional comparisons such as linear vs. digital, big screen vs. small screen, or even Platform A vs. Platform B to a more meaningful distinction between skippable vs. non-skippable.

ACTION FOR PLANNERS

Brands need plans that effectively orchestrate across skippable and non-skippable formats.

CONSIDERATIONS FOR PLANNERS

Streaming platforms make ad-free options available at higher subscription prices and therefore viewers' response to non-skippable formats within those environments could be impacted by that context.



INSIGHT 05

ATTENTION MATTERS BUT DOESN'T HAVE TO BE CONTINUOUS

The Brand Reset study confirms that more attention reaps greater brand-building effects. However, it also shows that after 20 seconds, attention delivers little additional impact, which calls into question the assumption that more attention is always better.

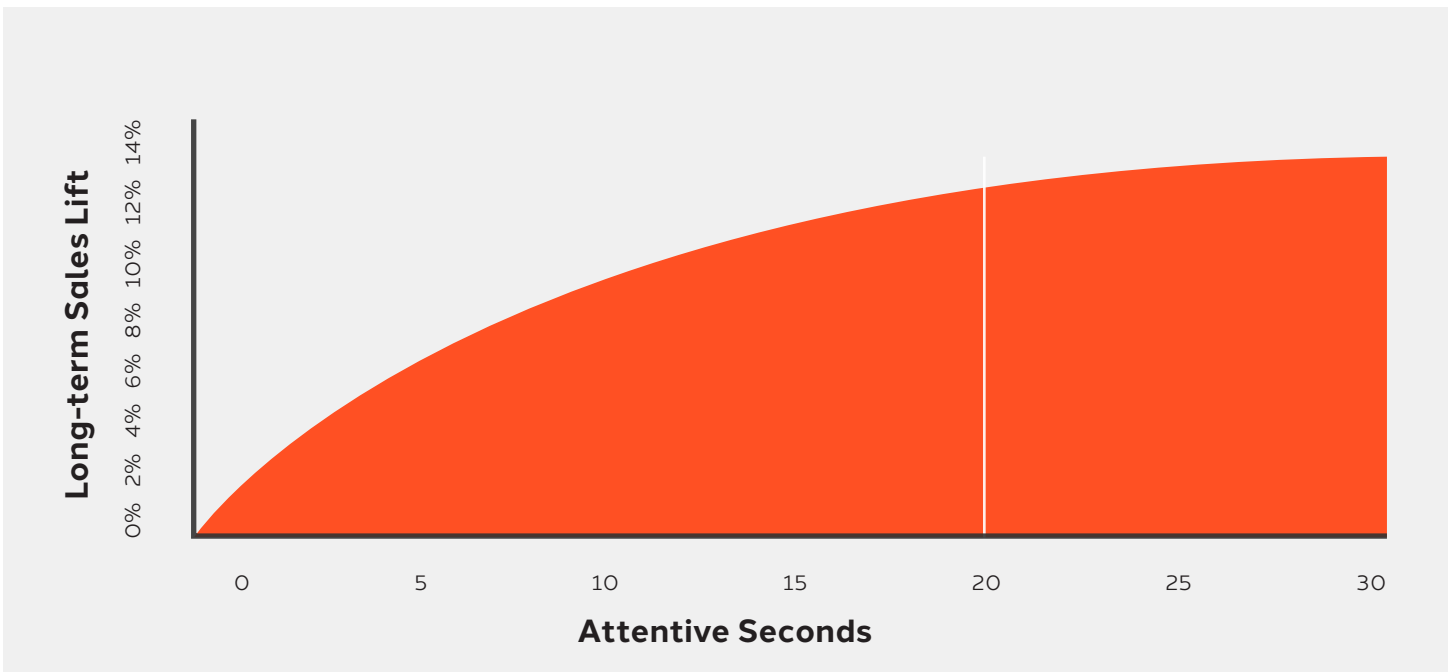
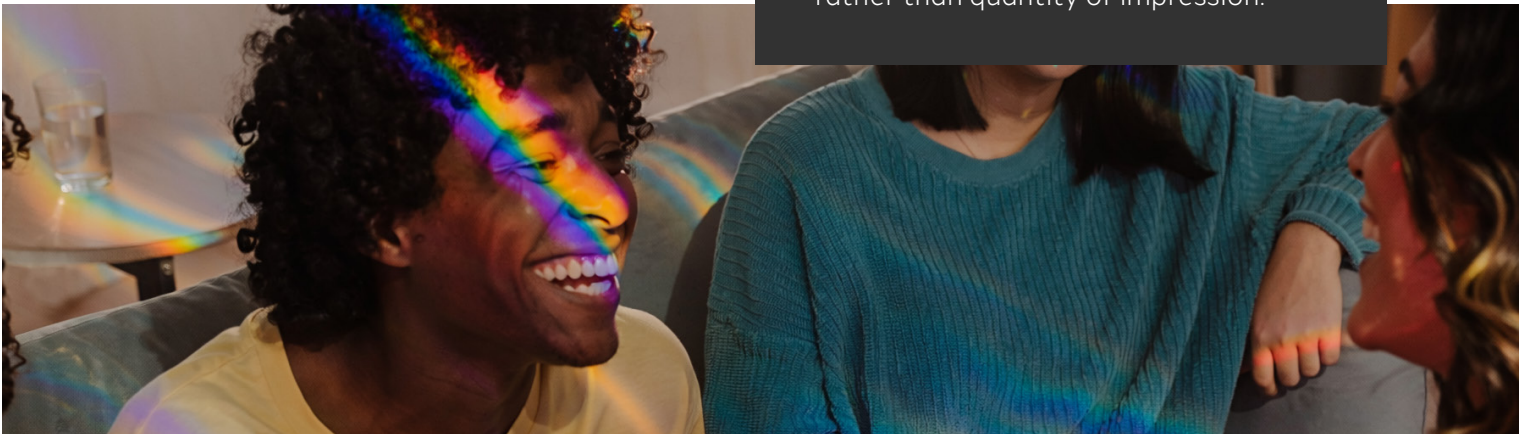
If a consumer watches half of an ad's duration most of the time, even on un-skippable formats, the value of ads that are longer than 30 seconds should be questioned.

ACTION FOR PLANNERS

This highlights that planning for attention is nuanced and requires an understanding of how much attention is sufficient to deliver on brand objectives.

CONSIDERATIONS FOR PLANNERS

This builds on growing bodies of industry knowledge that not all attention is equal; it's about quality rather than quantity of impression.



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Finding that more attention produces more long-term impact, but with diminishing returns feels right and fits with learning theory, rehearsal theory, and saturation effects in memory encoding.

LES BINET

Author, Professor & Marketing Consultant

IMPLICATIONS FOR PLANNING AGAINST KANTAR'S MEANINGFUL DIFFERENT AND SALIENT (MDS) FRAMEWORK

***The Brand Reset* study cements attention as a north star metric for strategists and planners who are seeking to win the battles of media quality and brand prominence in our complex and congested media landscape.**

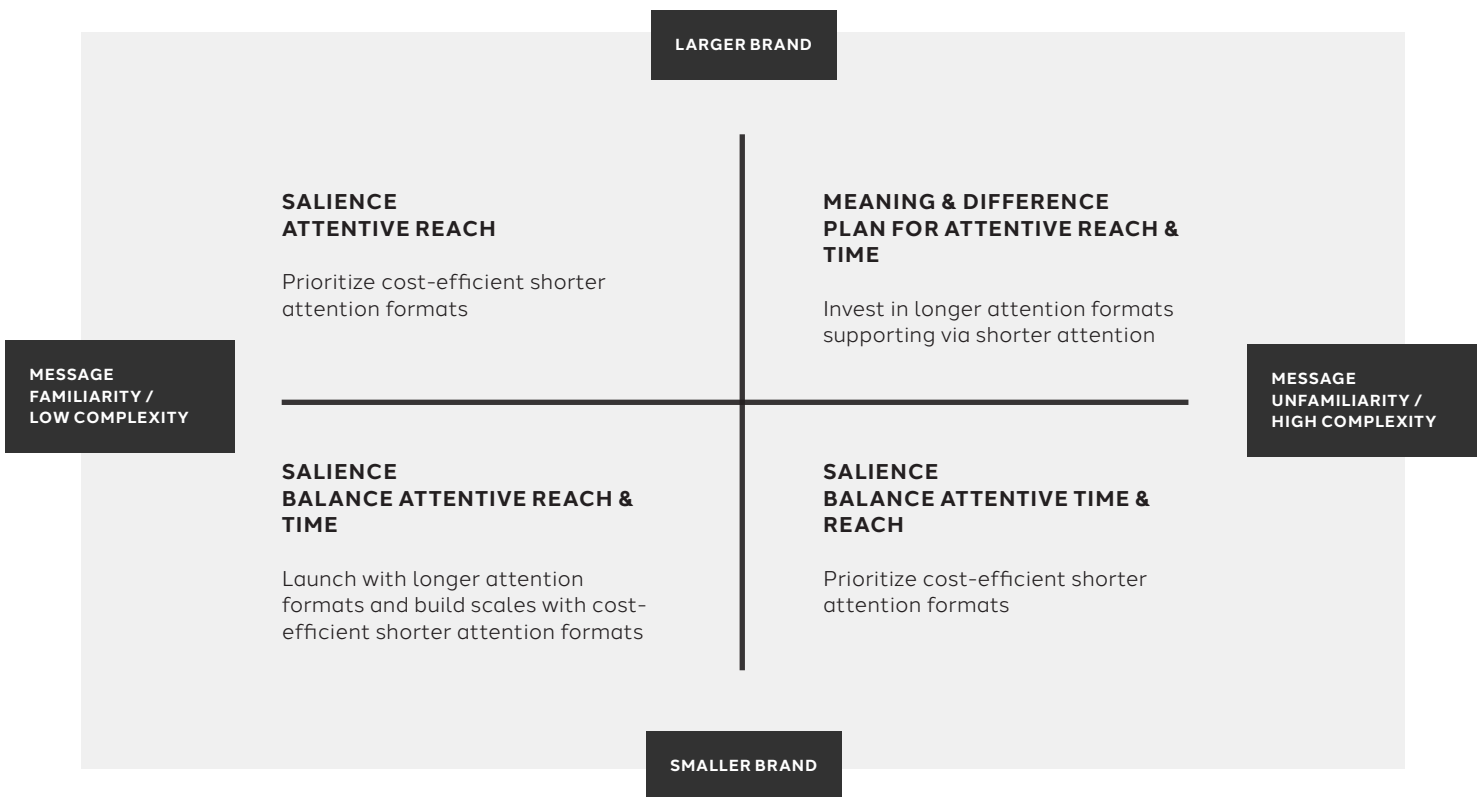
The reality for planners today is that there is an almost unlimited supply of inventory with short attention and a limited supply of longer attention to plan and activate against. Determining the right mix, price and sequencing of different forms of attention has been a major challenge up to now.

However, dentsu teams are now empowered by *The Brand Reset* dataset to master the intricate craft of planning for attention as this asset is now sitting at the heart of our planning tool suite. This means that we develop custom combinations of channels, platforms and formats that meet each brand's attention and, ultimately, communication needs.

DIFFERENT BRANDS & TASKS REQUIRE CUSTOM SOLUTIONS

The Brand Reset links attention to long-term brand growth using Kantar’s Meaningful Different Salient (MDS) framework. But we recognize that brands do not plan to a composite metric of MDS, they plan to solve specific problems.

As such, we’ve broken out the findings for M, D and S with each component having its own curve. This allows planners to match media and creative to the brand’s specific objective, whether that’s brand awareness, consideration, or differentiation.



This is a model that we use to determine the role of attention in a particular situation for brands and how planners should prioritize attention tactics: attentive reach versus attentive time.

We consider the task. Does it lean towards Salience which can be built effectively by formats that offer lower attention thresholds, e.g., fewer than three seconds? Does it lean towards Meaning or Difference, in which case

more attention is likely to be needed and different mix of formats (non-skippable formats can add to the impact of attention on brand outcomes)?

We also consider brand size in this model as we know that bigger brands convert attention to outcomes more easily and also tend to have larger budgets with which to make choices.

PLAN VIDEO HOLISTICALLY

***The Brand Reset*, amplifying dentsu's depth of learning in attention, enables planners to evaluate video choices holistically and to break down barriers between big screen and mobile/social-first planning.**

In many cases video is being planned in a disjointed way with a traditional broadcast approach and metrics siloed from the approach taken on social platforms. Our dataset enables advanced planning on a level playing field with teams able to deploy a common planning currency and consistent set of business metrics represented by Kantar Brand Power.

The Brand Reset dataset sits at the heart of Global Planner, our key tool for channel and format level decisioning. Our teams are empowered to deploy these advance attention learnings alongside reach and cost to maximize the outcome against their goals.

This means not only selecting the right channel mix but also flighting attention week by week to ensure that formats are deployed to ensure the campaign's narrative is delivered through the best attention sequences.



WHAT'S NEXT FOR BRAND RESET

WHERE THE RESEARCH WILL TAKE US NEXT

THE POWER OF THE ALGORITHM
AGGREGATE ATTENTION
NEW FREQUENCY RULES
EXPANSION TO BVOD

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***The Brand Reset* has re-legitimized long-term brand building in digital video.**

It has shown that attention quality matters, not just impressions.

It suggests that voluntary attention is more powerful than forced exposure.

It gives planners a psychologically coherent way to think about modern video effects.

It has reopened a serious industry conversation about long-term value.

LES BINET

Author, Professor & Marketing Consultant

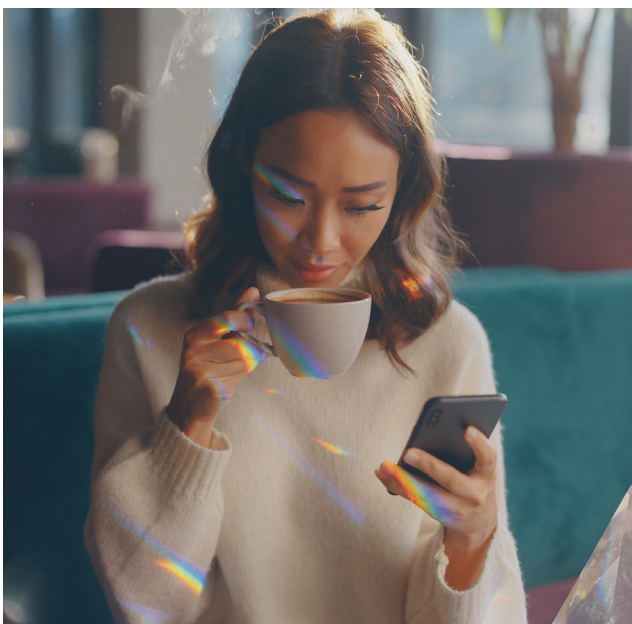
WHAT'S NEXT FOR THE BRAND RESET

For brands striving for sustainable growth through video, the era of focusing on short-term results through cheap clicks and performance outcomes are over. In the Algorithmic Era, the winners will be those who understand the necessity of balancing brand and performance investment so that the brand can thrive in both the short and the long term.

The best brand managers know that having a strong brand drives more efficient and effective performance campaigns. They have identified the best video platforms and formats to use through attention-led planning.

We are entering a new phase for next-gen media planning, one where creativity, attention and brand equity operate together to create sustainable commercial value.

This report marks the beginning of that shift and represents the foundation of an ongoing program of learning, refinement and real-world application. We have learned a lot, but there is still more to uncover, more to validate and more to build.



As we move forward, our research will deepen in the following areas:

THE POWER OF THE ALGORITHM

Each platform is unique. AI-enabled algorithms play an important role in maximizing advertising effectiveness. Understanding the impact of these algorithms on attention and long-term brand outcomes is needed. Future research will explore how brands can best align creative and media strategies with platform-specific algorithmic requirements to unlock greater value.

AGGREGATE ATTENTION

In mobile-first, fast-scrolling environments, brand impact can be achieved through multiple short exposures rather than a single, prolonged view. Our findings highlight the importance of validating the notion of aggregate attention - how brief, repeated exposures can combine to deliver meaningful brand lift. Further investigation will clarify how aggregate attention works across different platforms and objectives, enabling brands to plan for cumulative impact.

NEW FREQUENCY RULES

Algorithmically led platforms demand a new approach to frequency. Legacy assumptions about optimal exposure patterns no longer apply. We will examine how frequency requirements have changed to help brands calibrate their strategies for both skippable and non-skippable formats to ensure efficient investment.

EXPANSION TO BVOD

Broadcast Video on Demand's (BVOD) rapid growth and expanding role in total video consumption make it an essential addition to the next phase of the program, ensuring our insights evolve in step with real viewer behavior.

AS THE LANDSCAPE CONTINUES TO EVOLVE AT PACE, WE WILL KEEP PUSHING TO UNCOVER EVERY OPPORTUNITY THIS NEW ERA PRESENTS.

THE BRAND RESET HAS BEGUN

APPENDIX

PARTNERS
CONSULTANTS
METHODOLOGY
DEFINITIONS

PARTNERS

KANTAR

KANTAR

Kantar are world leaders in measuring and tracking the value of brand health, and the effects of advertising exposure. Kantar's proprietary externally validated (by the Marketing Accountability Standards Board) framework measures brand equity based on being Meaningful, Different, and Salient. This framework has been proven to predict that brands with high "demand power" have 9x higher volume share and are 4x more likely to grow.

Kantar's BrandZ analyzes further reinforce the MDS framework's financial credibility, consistently showing that portfolios of brands with strong MDS scores outperform major stock indices over time. The BrandZ Global Top 100 reports show that the Strong Brands portfolio has exceeded long term performance benchmarks such as the S&P 500 and MSCI World indices.

LUMEN x TVISION

LUMEN & TVISION

Lumen is Dentsu's long-term partner and the word leader in measuring advertising attention and how it influences in-market outcomes. TVision works with Lumen to deliver accurate measurement of the attention given to TV advertising.

SNAPCHAT   **Spotify**

  **teads**

 **TikTok**

PLATFORM PARTNERS

The study tested formats from ten next-gen video platforms or services including – Snap, Pinterest, Teads, Spotify, TikTok.

CONSULTANTS



DAN WHITE

Brand and Media Research Veteran

Dan's career includes a decade as an insights professional, another as a brand advisor and a third as a Chief Marketing Officer. Dan co-developed BRANDZ, the world's biggest brand equity measurement system and his thinking has shaped the design of leading copy test and brand tracking methodologies. Today, Dan splits his time between brand consultancy, training, platform speaking, illustration and writing. He is the author of three best-selling books: *The Smart Marketing Book*, *The Smart Advertising Book*, and *The Smart Branding Book*.

Role for *The Brand Reset*: Methodology, Data Analysis & Insight



LES BINET

Author, Professor & Marketing Consultant

Les Binet is a global authority on marketing effectiveness, having won more effectiveness awards than anyone else in the industry. He's a sought-after speaker, consultant and trainer, and his books have sold tens of thousands of copies. He serves on the Senior Advisory Board of the *Journal of Advertising Research* and is a Visiting Professor at Ravensbourne University.

Role for *The Brand Reset*: Advisor

APPROACH

Like our *Attention Economy* research, we have galvanized the industry in this groundbreaking study – bringing together Kantar, Lumen, thought leaders, and ten global platform partners to drive the research.

The Brand Reset's pioneering approach links attention to brand equity - the key driver of long-lasting sales. The methodology, developed with Kantar and Lumen, combines attention data with Kantar's Meaningful, Different, Salient (MDS) brand equity framework and a proprietary Sales Simulator powered by thousands of Kantar data points from databases such as BrandZ that link brand equity to financial performance.

The research measured each tested format's power in making both a short- and long-lasting sales impact from a single exposure. We have then combined these effects with the channel's cost and reach, enabling us to have a rounded picture of effectiveness. The results are contextualized by benchmarking to Linear TV as this channel continues to be the go-to medium for brand-building for many brands. With this benchmarking we uncovered the value of next-gen video.



METHODOLOGY

The research used Kantar's Context Lab methodology, comparing people exposed to an ad once with a matched unexposed group, with responses captured about 60 seconds after exposure to reflect emerging long-term brand memory. It is similar to Brand Lift but more sensitive because it measures impact at its peak. All creatives came from the same campaigns and were optimized for each platform's format and best practices. A single exposure study in Context Lab does not account for the effects of frequency or platforms' algorithmic capabilities.

The Brand Reset builds on five measures: Attention, Meaningful, Different, Salience and Purchase Intent, each linked to in market sales through Kantar's databases. Attention indicates viewing duration and weights the data. Meaningful reflects the extent to which brands build a clear and consistent emotional connection and are seen to deliver against consumer needs. Different reveals the extent to which some brands are seen to offer something that others don't and lead the way. Salience captures brand recall and the mental availability of the brand: how quickly and easily the brand comes to mind when making a purchase or usage decision. Purchase Intent measures future likelihood to buy.

To ensure results reflect real behavior, Lumen's database applies adjustments for differences in viewing time and attention between research settings and natural TV screen viewing.

KEY BRAND DEFINITIONS

- **Attention** – the total time, in seconds, that viewers looked at the ad, as recorded by eye-tracking technology.
- **Next-gen video** – the modern ecosystem of digital, algorithm-driven video platforms.
- **Digital video** – all video advertising served on laptops, desktops, or mobile devices rather than TV screens. For clarity, Connected TV (CTV) is not considered digital video, as it belongs to the TV screen environment.
- **Long-term sales effect** – the aspect of advertising’s impact that strengthens brand equity and contributes to future sales over an extended period, typically up to about three years.
- **Short-term sales effect** – the immediate, easily-measurable sales generated by advertising within a short time window of up to about three months.
- **Brand advertising** – focuses on building long-term brand awareness, memories and affinity through emotional or product-led storytelling, with the goal of strengthening brand equity. It doesn’t include urgent calls-to-actions or flag current price promotions/offers - which are defining features of performance advertising.
- **Single exposure** – used to capture the shifts in key brand associations caused by a single view, and to estimate the long-term

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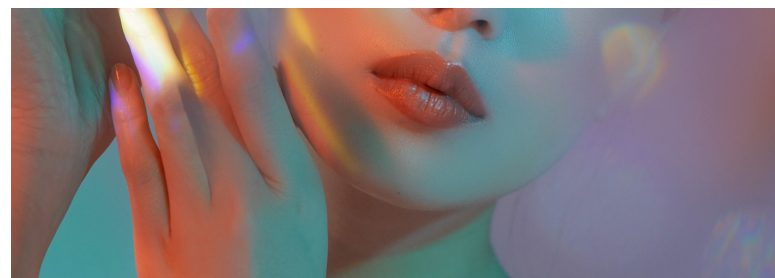
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1. "Doom Loop" and "Multiplier Effect" are key concepts from a 2025 WARC report, *The Multiplier Effect: A CMO's Guide to Brand Building in the Performance Era*.
2. **Ernst & Young - EY Parthenon**
3. **CMO Navigator – Rethinking Marketing in the Age of AI (dentsu).**
4. This finding provides quantifiable proof to build on a growing body of industry evidence highlighting the broader brand-building potential of digital environments notably: Binet and Field's Media in Focus (2016) which provides econometric proof that digital video contributes significantly to long-term brand growth when used within balanced media strategies; Profit Ability 2 (2024) which expands this perspective by quantifying the long-term return of digital formats, demonstrating that digital channels play a key role across multiple categories and campaign types; The New Influencer Marketing Econometrics, presented at the IPA Effectiveness Conference in October 2025, reinforcing that digital, influence-driven content can achieve long-term brand effects comparable to more traditional channels.
5. These are, of course, predicted, not measured, effects inferred, rather than directly observed via immediate attitudinal shifts, calibration models, and historical databases, but this preliminary data gestures towards sales that have been left on the table by an underinvestment in long term.
6. It's also consistent with the findings of leading advertising researcher and author of *When Ads Work: New Proof That Advertising Triggers Sales*, John Philip Jones, who has asserted that "there are no long-term effects without short-term effects."
7. **CMO Navigator – Rethinking Marketing in the Age of AI (dentsu).**

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