

KANTAR

LIFT+
powered by THX.

SAN PELLEGRINO CIAO
BELGIUM
Q2 2026



BRIEFING LIFT+ powered by THX.

SAN PELLEGRINO CIAO, Q2/2026

San Pellegrino has asked Kantar to unpack the effects of Crossmedia advertising on the most important Brand KPIs. This document outlines the results of the San Pellegrino Ciao campaign and is built on extensive experience within the field of Crossmedia effect research, best-in-class [AI technology](#), and accurate, [passive measurement](#) of real consumer behaviors.



SETUP San Pellegrino Ciao 2026

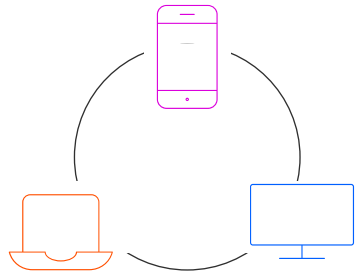
San Pellegrino and Kantar have started a partnership with the aim of amplifying San Pellegrino’s global marketing efficiency. This document is designed to illuminate the key findings derived from the comprehensive single-source crossmedia measurement undertaken as part of this initiative.

CAMPAIGN OVERVIEW		BRAND KPI'S	MEDIA CHANNELS	AUDIENCE
Region	EMEA	Ad Awareness	Crossmedia (Total)	BE 18+
Market	BE	Aided Brand Awareness	Social	BE 18-45
Campaign	San Pellegrino Ciao	Purchase Intent	(D)OOH	
Timings	22/04/2026 – 22/06/2026	Brand Image: <i>CIAO evokes a sunny Italian lifestyle with sparkling water and a touch of fruits</i>	Retail Media: Web/App	
Weeks	#10 weeks		Retail Media: DOOH	
Invest. (media)	€490.492,-		Retail Media: Instore POS	

METHODOLOGY Research design

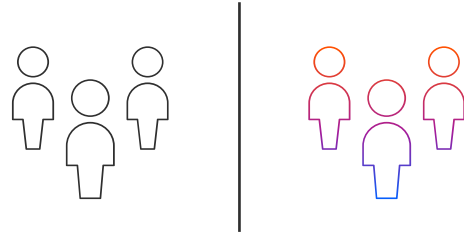
The LIFT+ powered by THX. crossmedia approach uses an exposed/non-exposed research design to measure the difference in attitudes between groups of consumers, aiming to determine the attitudinal effects of advertising exposure.

CAPTURING MEDIA EXPOSURE



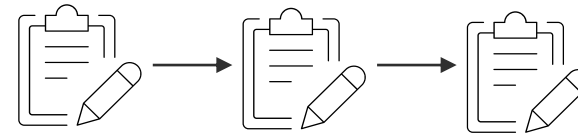
Media behavior is captured passively via ACR/Location tracking or through media consumption questions.

DETERMINING EXPOSURE GROUPS



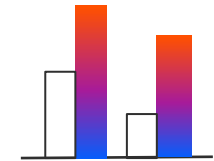
Based on media exposure and media actuals, audiences are classified as exposed or non-exposed for each media type within the campaign.

AUDIENCE DATA



The target audience is interviewed while the media is running and/or after the campaign has ended.

ANALYSIS



Crossmedia modelling analytics tool to quantify the contribution of advertising activity to measures of brand equity.*

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passive measurement

TRACKING REAL-TIME BEHAVIOR.



REAL-TIME LOCATIONS (DOOH, STORES, EVENTS)



CROSSMEDIA EXPOSURE (OFFLINE/ONLINE)



DIRECT COMMS FEEDBACK (BRAND LIFT)



DIRECT QUAL FEEDBACK (DEEP-DIVE VIDEO)



50,000+ ACTIVE USERS, 500+ VARIABLES

Is **crossmedia**
effectively contributing
to brand growth?

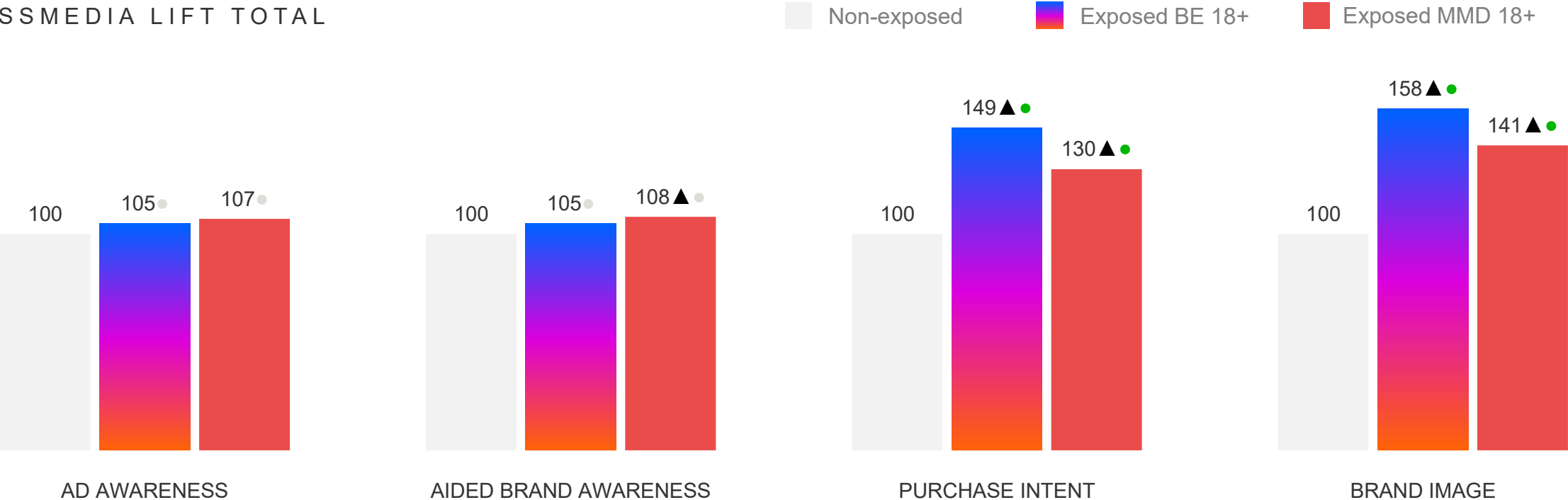
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MMD exposure drives the **strongest impact on Brand Image and Purchase Intent**

Overall, the campaign has the highest impact on the lower-funnel KPIs of San Pellegrino. Additionally, MMD exposure significantly impacts Aided Brand Awareness. Increasing contact frequency within MMD could further strengthen impact on advertising awareness.

CROSSMEDIA LIFT TOTAL

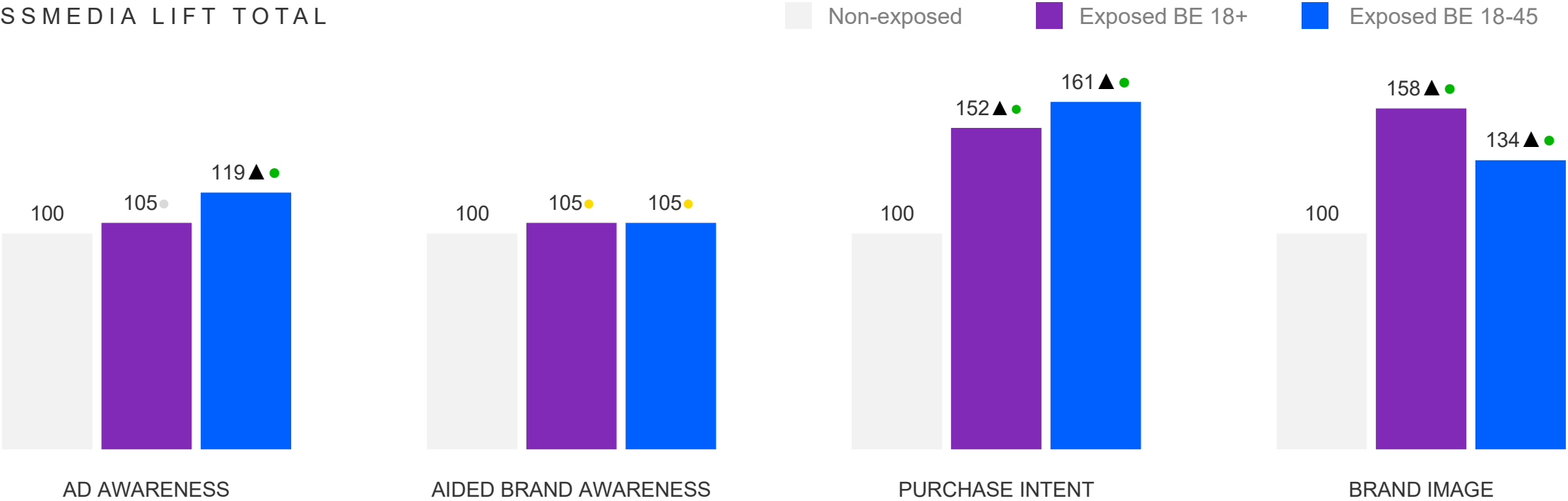


Campaign drives highest Brand uplift on Purchase Intent among BE 18-45

Exposure to the San Pellegrino Ciao campaign drives significant, above-norm uplifts in Purchase Intent and Brand Image across both audiences. Among 18-45s, the campaign also significantly increases Ad Awareness, indicating stronger resonance and overall effectiveness within this audience.



CROSSMEDIA LIFT TOTAL



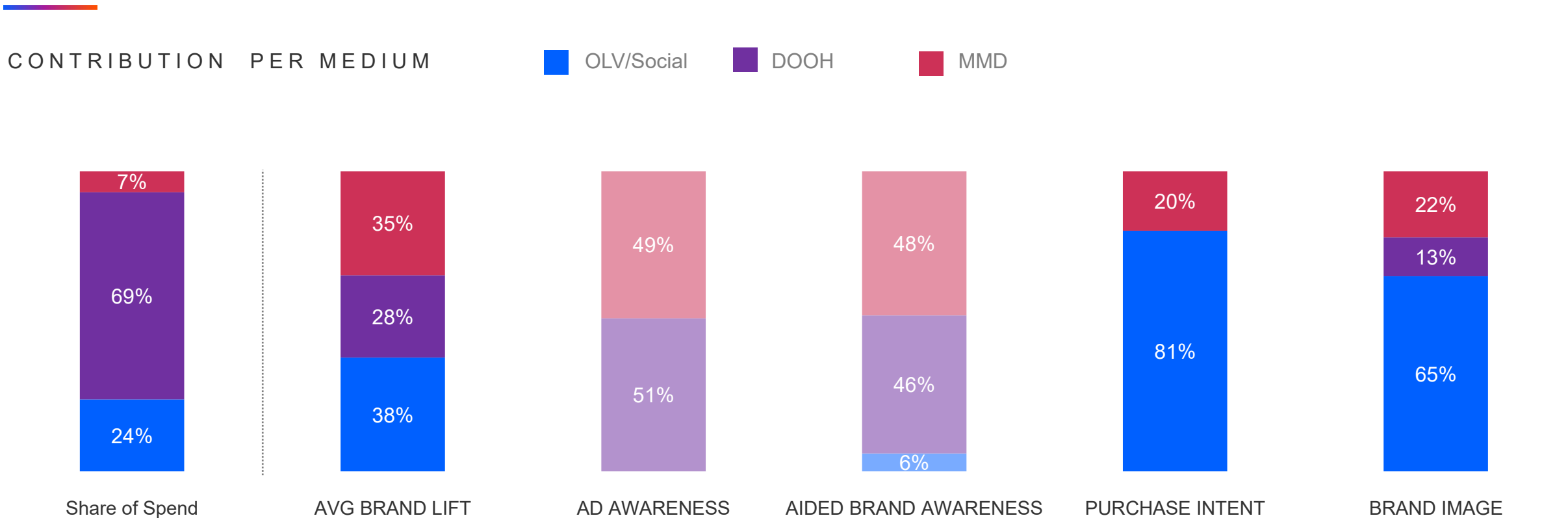
What are the most
effective channels to
drive brand growth?

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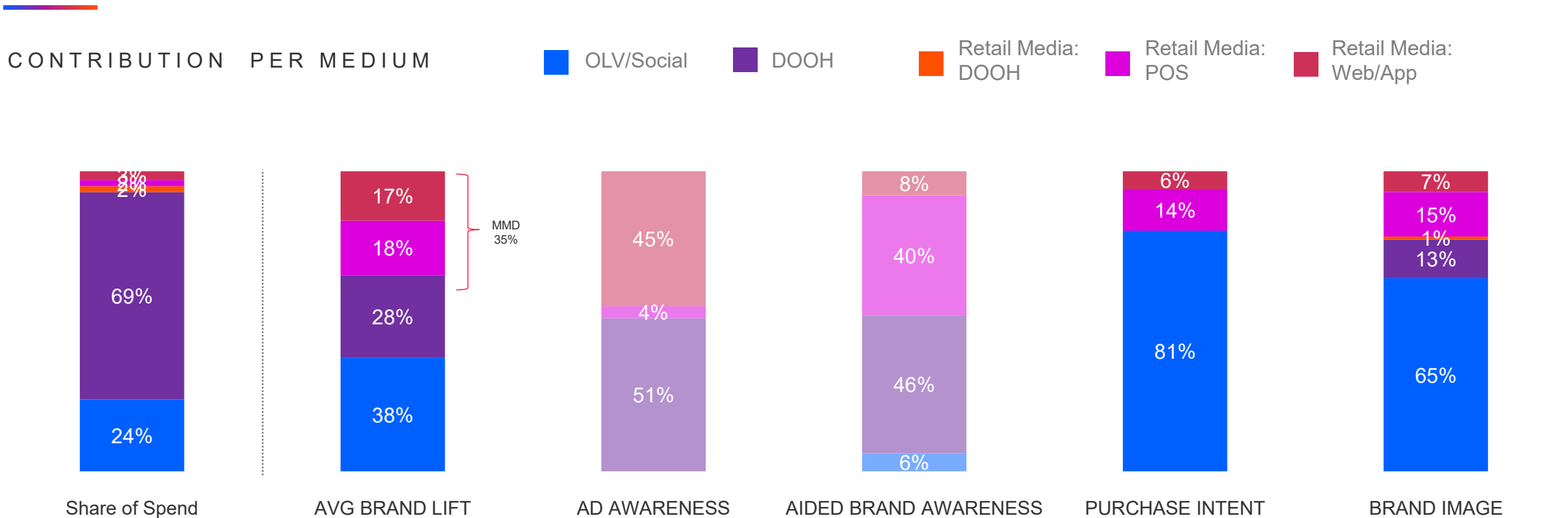
MMD contributes to 35% of the uplift on the brand KPIs of San Pellegrino

Social/OLV provides the foundation for campaign impact through its broad reach. MMD contributes strongly across the funnel. Expanding both reach and contact frequency could further strengthen its contribution to campaign performance and helps to amplify the potential the deployment ahsows on Awareness.



MMD contributes to 35% of the uplift on the brand KPIs of San Pellegrino

Social/OLV provides the foundation for campaign impact through its broad reach. POS is the strongest MMD driver of effectiveness, followed by web/app. While MMD DOOH contributes to Brand Image, its overall impact is more limited due to lower reach. Expanding DOOH reach could further strengthen its contribution to campaign performance.



Advertising via MMD channels proves to be very **cost efficient**

Delhaize's POS is the most cost-efficient channel in the current media mix, followed by Delhaize's Web/App and OLV/Social. External (D)OOH is less efficient relative to investment levels, suggesting an opportunity to improve overall campaign efficiency by shifting budget towards higher-performing channels.



COST PER LIFT



OLV/Social



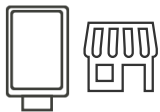
(D)OOH



Retail Media:
Web/App



Retail Media:
POS



Retail Media:
DOOH

24%

69%

3%

2%

2%

SHARE OF SPEND

€ 0.76 ●

€ 6.52 ●

€ 0.62 ●

€ 0.11 ●

€ 2.46 ●

COST PER LIFT
AVG ACROSS KPI'S

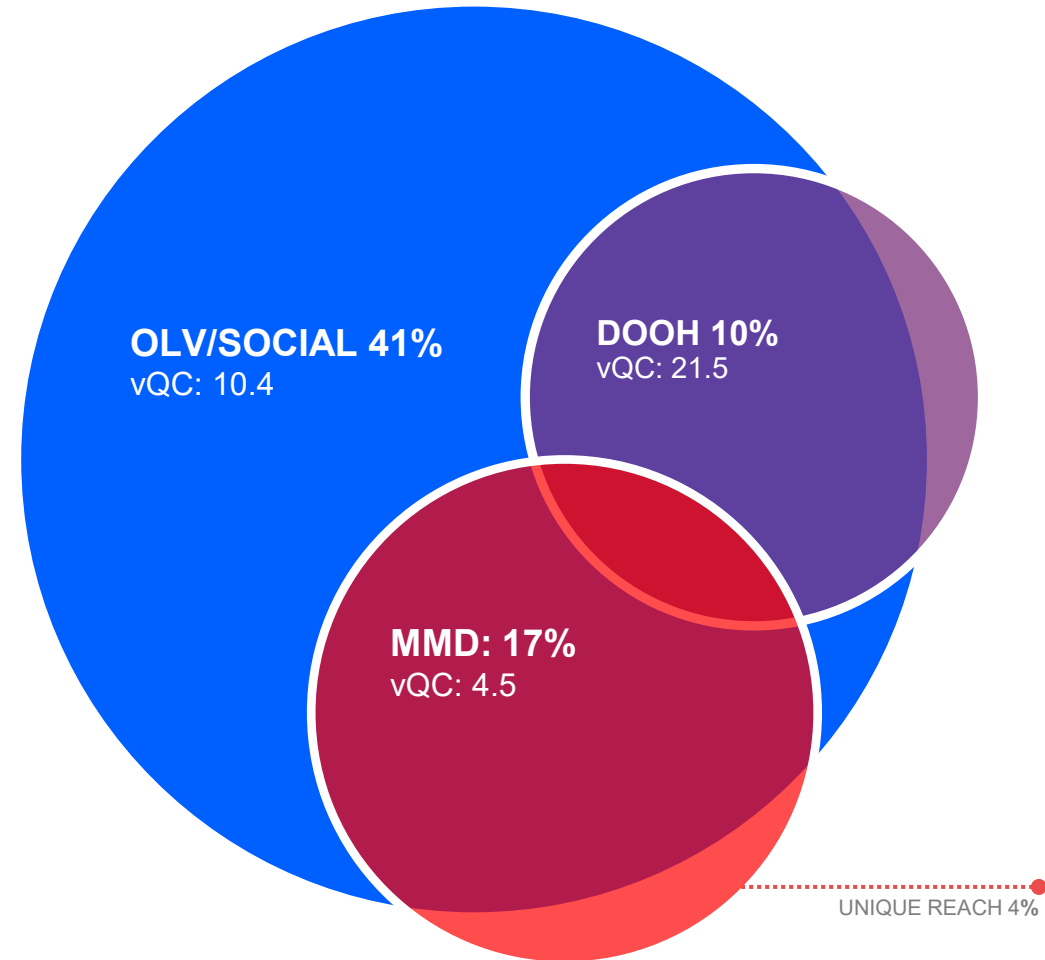
What **optimizations**
could enhance the
crossmedia impact?

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Retail Media adds +4% unique reach to total Crossmedia reach (46%)

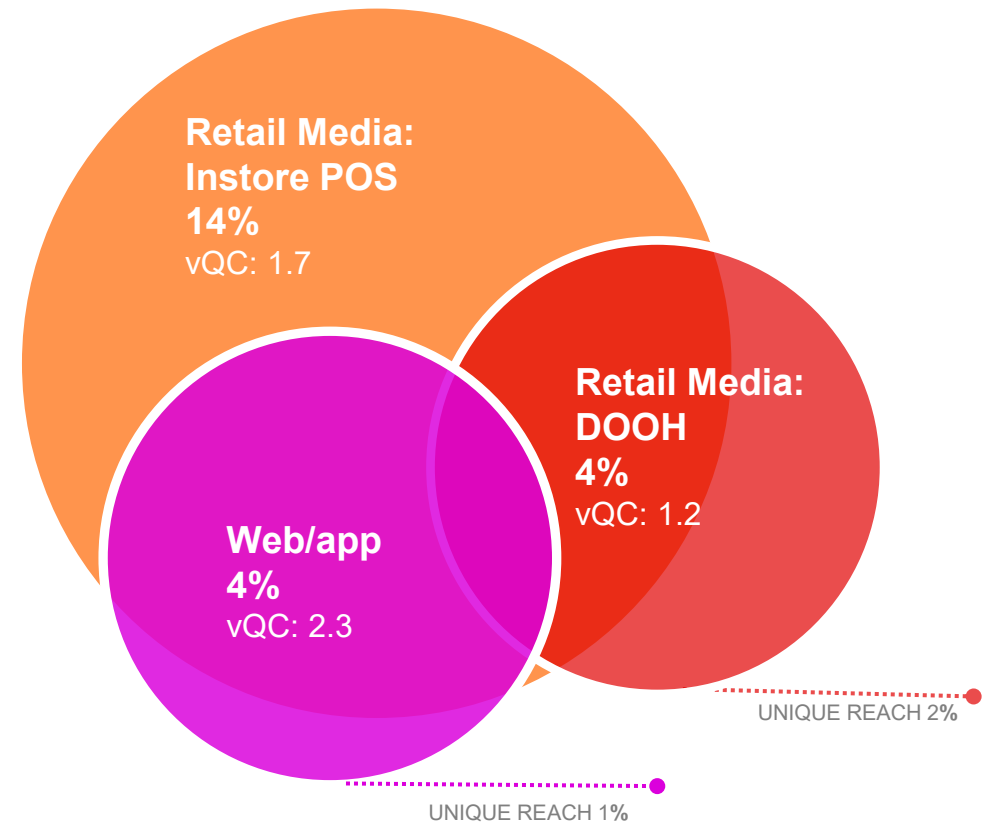
The San Pellegrino campaign achieved a total cross-media reach of 46% (BE 18+). MMD delivered a 17% reach, contributing an additional 4% in unique reach on top of OLV, social and DOOH.



MMD POS has the highest reach within Retail media mix

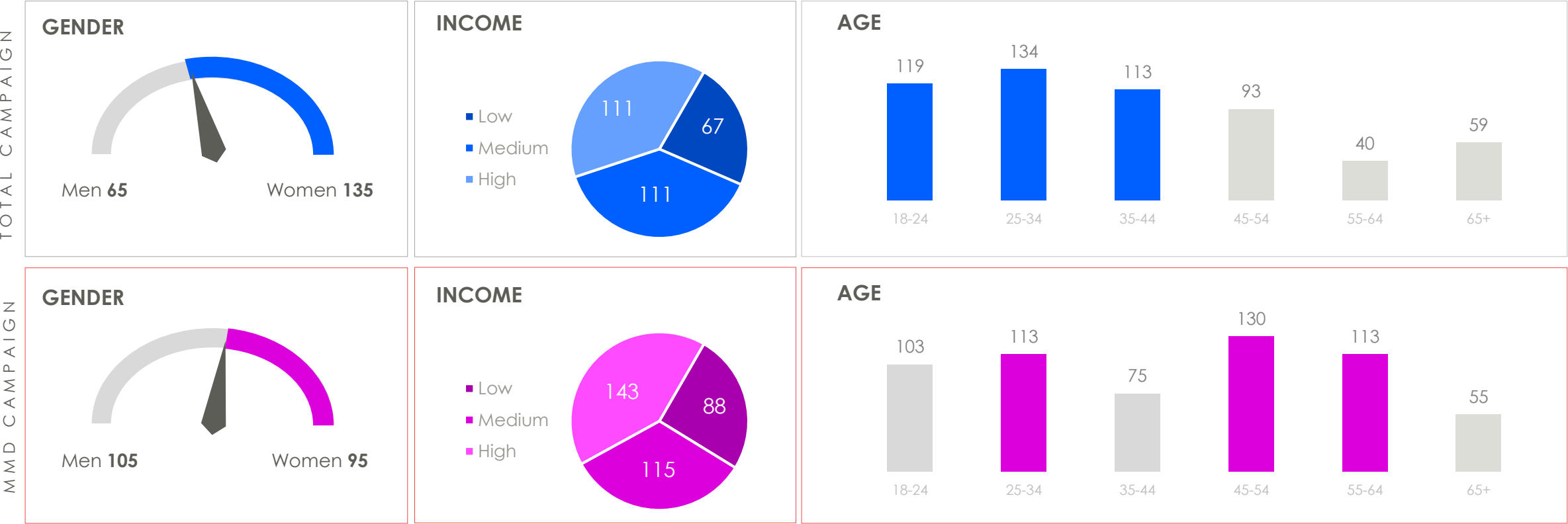
Within MMD channels, POS delivers the highest reach at 14%, followed by DOOH and Web/app. Both DOOH and web/app provide incremental reach on top of POS, resulting in a total MMD reach of 17%.

To further improve efficiency, **increasing the contact frequency of Retail Media deployments is recommended.**



MMD campaign slightly more selective on the higher incomes and age 45-64

Compared to the total campaign, MMD retail media also shows stronger selectivity among 45–64-year-olds. Next to that, the higher income and male audience is reached slightly more.



CROSSMEDIA ASSETS San Pellegrino Ciao 2026

Retail media
DOOH entree screen



Retail Media
Web/App Banner

CIAO! Het nieuwe bruiswater met een fruitige touch

Probeer CIAO! >

Zonder suikers, zonder calorieën, zonder zoetstoffen



Social
6"



Campaign brings **positive reactions** because of **festive & appealing visuals** and associations with **vacations and health**

EXPOSED AUDIENCE



'Why did this campaign influence your perception of San Pellegrino?'



**#APPEALING
#FRESH & HEALTHY**

"It is an advertisement that appeals to me. It looks so fresh and it is especially attractive because it also seemed quite healthy. That it does not contain too much sugar and is based on sparkling water. And I think that is a good angle. That is why I think it is a good advertisement."



**#REFRESHING
#LONGING FOR VACATION**

"The drink Ciao by San Pellegrino really makes me long for a vacation, for Italy, and for a lovely warm terrace in the sun, where I can enjoy this refreshing, cool drink with an ice cube, which is truly very thirst-quenching and helps me satisfy my thirst."



**#FESTIVE
#VIBRANT**

"I really like this San Pellegrino advertisement because it is festive, the colors are vibrant, the information is really useful — namely buy one get one free — so it really makes you want to go buy it. I really like this ad, it's clear, it's lively, it's summery; yes, I really like it."

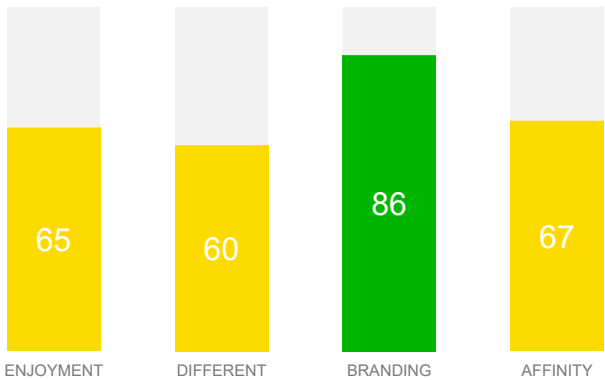
DOOH entry screen excels on Branding, Web/App on Different

Receptivity to the video assets was particularly strong, likely driven by the effective use of brand cues and the summery atmosphere they convey. In addition, Different performed well across all creatives, suggesting that San Pellegrino successfully delivered a distinctive and original campaign. Branding within the Web/App assets could be strengthened by increasing consistency with the other creatives and incorporating stronger brand cues.

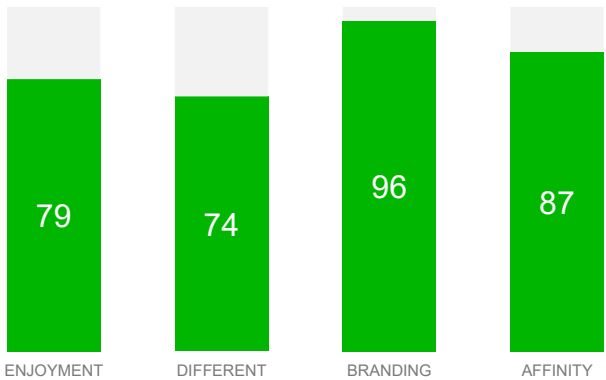
CREATIVE MEASURES



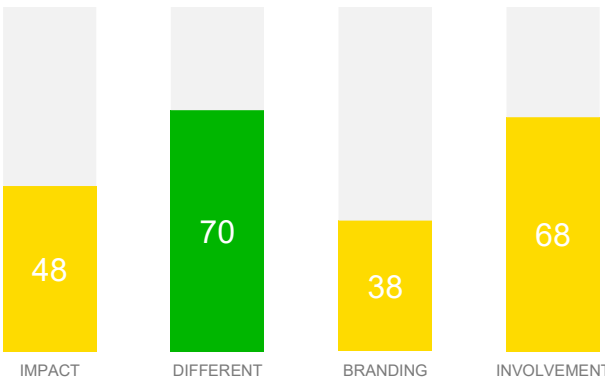
Retail Media
DOOH Entry Screen



SOCIAL
6''



Retail Media
Web/App Banner



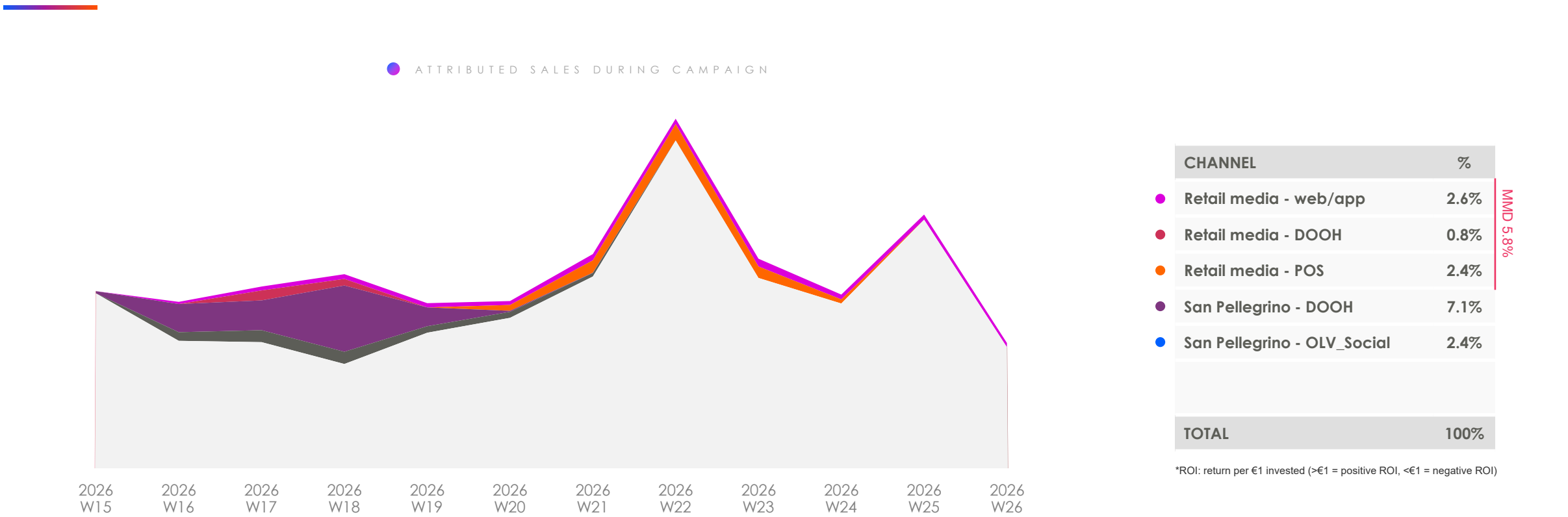
SALES LIFT

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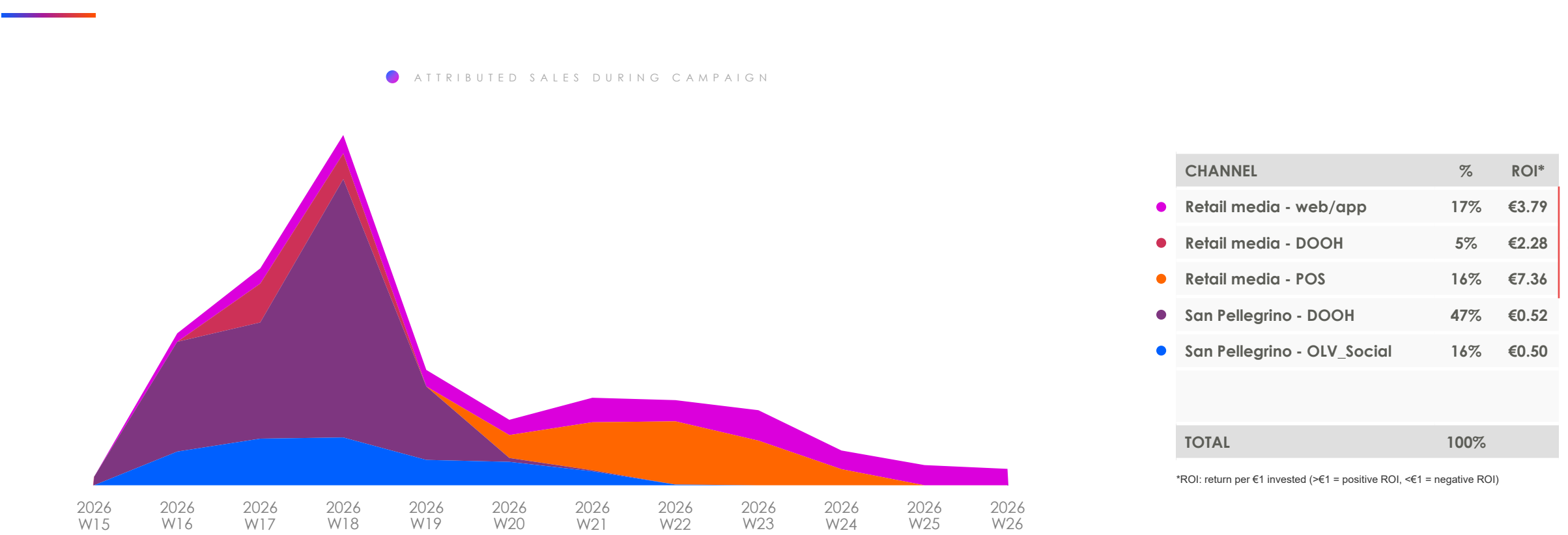
Crossmedia campaign responsible for +15.2% short term sales lift of San Pellegrino

The MMD channels contribute to 5.8% of this uplift on the sales of San Pellegrino, with Web/App and POS contributing most. External DOOH contributes most to the uplift on the Sales Lift, in line with the high level of investment.



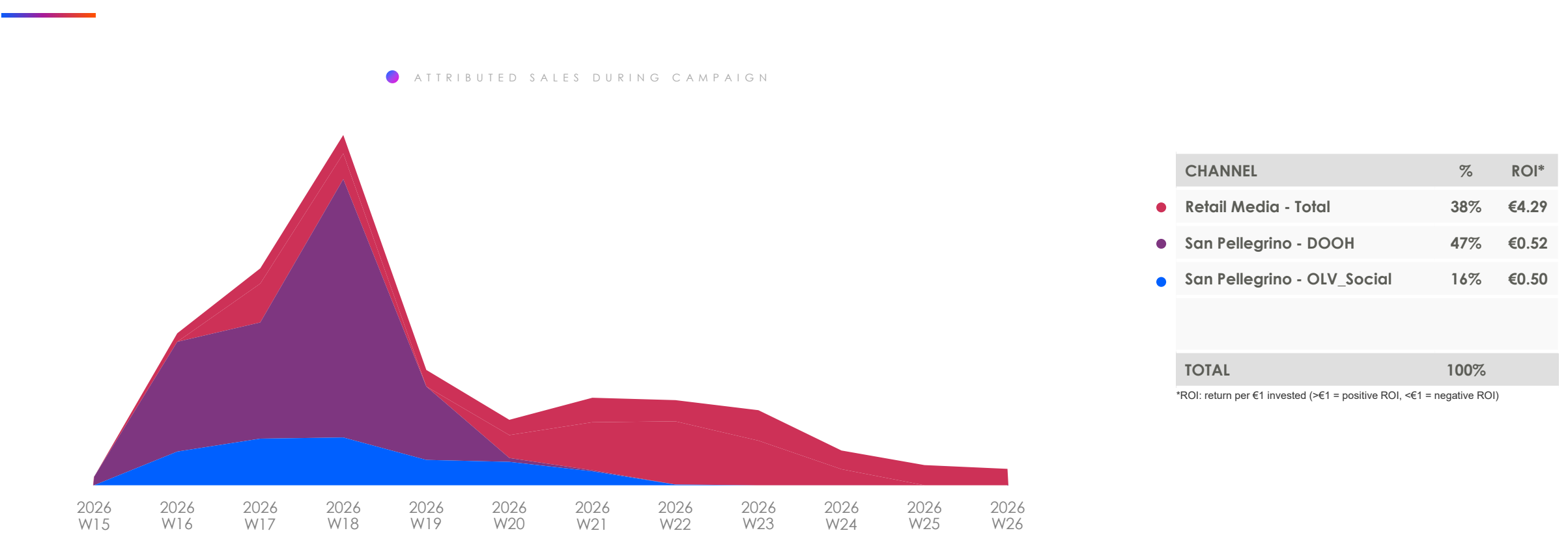
MMD contributes to 38% of the Sales Uplift, with online contributing most

The MMD channels delivered a strong ROI, with POS performing particularly well due to its proximity to the point of purchase. Retail Media DOOH and Web/App also generated strong returns, highlighting the important role these channels play in driving sales. Both external DOOH and OLV/Social have been less efficient in driving sales for San Pellegrino.



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Key Findings & Recommendations

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RECOMMENDATIONS San Pellegrino Ciao

Retail Media (MMD) contributed to 35% of the brand KPI uplifts from 7% of spend, with in-store POS the strongest contributor

- The campaign significantly increased Purchase Intent and Brand Image of San Pellegrino, driven by enjoyable and strongly branded creatives. MMD accounted for 35% of this uplift.
- Scaling POS-led MMD activations is recommended to further strengthen impact, given Retail Media's strong brand contribution and cost-efficiency. **Additionally, optimize the MMD DOOH reach (e.g., by extending the campaign length) to make more impact with the asset that proves to have a strong creative appreciation.**

Retail Media (MMD) added +4% unique reach on top of the 46% crossmedia total; reaching 17% overall

- Retain OLV/Social as the reach foundation and scale Retail Media for incremental unique reach and extra contacts. Especially reaching the higher incomes and 45-64 age group.
- MMD delivers strong incremental value on top of ATL, **underlining the importance of aligned flighting, targeting, and creative strategy.**
- MMD contact frequency remains relatively low; **increasing Retail Media frequency is recommended to further improve efficiency and strengthen impact on awareness.**
- Increase branding of Web/App to enhance impact.

Retail Media (MMD) delivered 38% of the total +15.2% short-term sales uplift within Delhaize

- Retail media was a key driver of campaign effectiveness, contributing 38% of the San Pellegrino sales uplift. Web/App, POS and MMD DOOH all generated strong returns, demonstrating the value of retail media in driving sales close to the point of purchase.
- **Shift more budget into the highly cost-efficient Retail Media channels given their strong ROI,** while evaluating opportunities to rebalance the (D)OOH investment - combining both to maximize cost-efficient sales lift next campaign.

Appendix

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HOW LINK AI WORKS

With best-in-class AI and Machine Learning technology, Kantar AI solutions deliver results you can count on.

For any new ad:

- Our AI tools systematically decomposes each ad into a sequence of frames
- The machine extracts up to 20,000 features from the video file using AI video processors
- Inputs them into machine-learning models trained on the LINK database
- Predicts the ad's percentile score on creative effectiveness metrics

Kantar's AI-driven process and machine learning to predict ad effectiveness in 15 minutes and without surveys

Upload video file
for new ad



Decompose
by time



AI analyses ad to
extract features

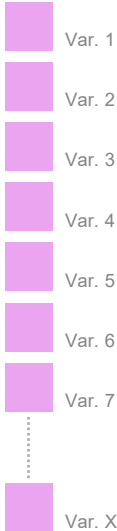
Things you
can see:

- Image
- OCR ¹

Things you
can hear:

- Audio
- Transcript

Ad features collated
into dataset



Dataset input
into ML model



Features for
new ad are
input into
algorithms
trained by
machine
learning on
the Link
database

Model predicts
ad performance

Sample Output
for New Ad

KPI	Impact Score
Market	Germany
Channel	TV
Percentile Score (out of 100)	88

¹OCR stands for Optical Character Recognition, and refers to text and other machine-recognizable elements such as brand logos appearing on screen

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