

Nickable Studies

The best of Thinkbox's 2025 research



thinkbox 

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Foreword

From Anthony Jones
Head of Research



In 2025, Thinkbox continued its mission of generating authoritative evidence on how advertising drives durable business outcomes.

What follows is a distillation of each study we did. All of them aimed to strengthen decision-making in different areas of the industry – be that brand equity, media allocation, advertising longevity or trust – and all worked towards the same goal: helping advertisers invest with more success.

We tackled a series of pressing questions. Do brands still matter? How do you put econometrics in everyone's hands? How long do advertising effects last, and how does that differ by media? What is the power of trust in advertising?

Each project answered a different question, but it is one story: in a noisy, restless market, the things that are built to endure – brands, trust, lasting impressions – matter more than ever.

Why brands still matter: Insights from ‘From Brand to Bland 2’

What is it?

Do brands still matter in our increasingly atomised and uncertain world? And if brands do still matter, does TV still matter to brands?

From Brand to Bland 2 resolved all that, making the business case for brand-building impossible to ignore and cementing TV’s role at its centre. Standing on the rational shoulders of [Profit Ability 2](#), this social experiment stripped real people of their most cherished brands, replacing them with identical but unbranded versions. It gave marketers an unfiltered, powerful demonstration of how brands shape perception, deliver value and fulfil deep emotional needs.

Brands don’t just appear, and brand equity comes from carefully crafted marketing messages that, with time, establish deep subconscious brand connections.

What we found

- Brands bring colour and connection to people’s lives, ‘anchoring’ perceptions of quality.
- Participants were staggered to discover they had still been using their favourite products, but de-branded. The experience had been so much worse – products tasted worse, they underperformed.
- Brands support core human needs, shape identity, and bring familiarity, stability and comfort.
- People develop deep, personal bonds and connections with their favourite brands, often rooted in years of family traditions and long-standing associations.
- Advertising has the ability to drive mental availability, ensuring brands are known and recognised.
- Advertising also helps build new associations that connect with cultural shifts, ensuring relevance.
- TV advertising is crucial to create, sustain and evolve deep brand associations – consistency is key.
- The unique trust people have in TV confers to the brands they see on TV.
- Economic turbulence is making us more discerning about where we spend our money.
- Strong brands deliver value to people – and they are willing to pay more for this value.



↑ Research participants

What people said

“The Brand team at Warburtons valued the insights around the importance of brands and how they can actually influence how we experience our favourite products and how, whilst we think we are highly rational beings, we’re not rational decision makers.”

Sarah Graham, Advertising, Media & Brand Lead, Warburtons

“‘From Brand to Bland 2’ is an interesting and insightful piece of research which really brings to life the power brands play in our daily lives. It helps us validate brand-led advertising in an age where more and more marketing spend is judged on immediate performance metrics. Ultimately, it highlights the influence our brain has on our unconscious decision making, giving tangible evidence to something we ought to know as true.”

James Watkins, Head of AV, Brazil Street

[Read the report here](#)

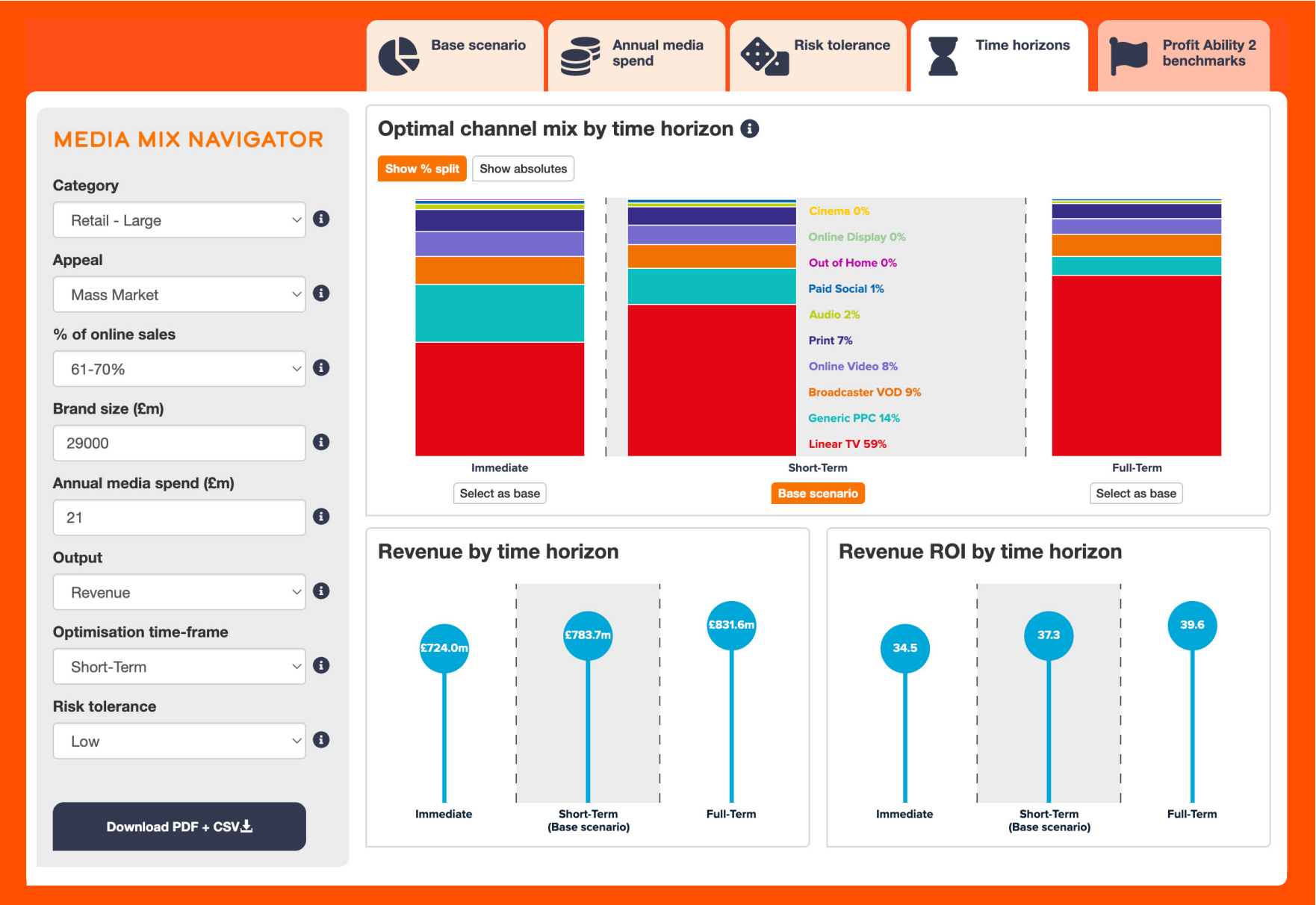
Media Mix Navigator

What is it?

The Media Mix Navigator is research-as-action; a free tool that democratises access to econometrics, enabling every advertiser, regardless of size or IT skills, to optimise channel mix against ROI, growth ambition and risk appetite.

This year, we brought it bang up to date, lifting the award-winning insights and eye-watering scale of data behind Profit Ability 2 off the page and into the industry’s arms for free. It bridges the gap between data mastery and accessible insight, bringing econometrics to every planner’s desk – in fact, to the desk of anyone with an interest in discovering what advertising is likely to do for them and their business, whatever shape, size or category.

At a time of increasing media choice and sophistication, and with relentless pressure on marketing budgets, the Media Mix Navigator is a user-friendly guide through the fog towards better campaigns.



Base scenario

Annual media spend

Risk tolerance

Time horizons

Profit Ability 2 benchmarks

MEDIA MIX NAVIGATOR

Category

Retail - Large

Appeal

Mass Market

% of online sales

61-70%

Brand size (£m)

29000

Annual media spend (£m)

21

Output

Revenue

Optimisation time-frame

Short-Term

Risk tolerance

Low

Download PDF + CSV

Profit Ability 2 benchmarks: Retail - Large

Average Profit ROI

Linear TV

Print

Audio

Online Video

BVOD

Out of Home

Generic PPC

Paid Social

Cinema

Online Display

Total

3.20

9.66

3.79

8.11

3.97

7.40

3.06

6.21

2.31

5.47

2.52

5.43

3.57

5.07

2.71

4.96

2.02

4.01

2.59

3.72

3.15

6.93

■ Short-term Profit ROI

■ Full Profit ROI

Media-driven Profit Contribution

Short-term Profit (3 months) for Retail - Large

Linear TV 33%

Generic PPC 21%

Paid Social 11%

Audio 10%

Print 7%

Broadcaster VOD 6%

Online Display 4%

Online Video 3%

Out of Home 3%

Cinema 0%

Media-driven Profit Contribution

Full Profit (2 years) for Retail - Large

Linear TV 46%

Generic PPC 14%

Paid Social 10%

Audio 9%

Broadcaster VOD 7%

Print 6%

Online Display 3%

Online Video 3%

Out of Home 3%

Cinema 0%

Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK [Click here to find out more](#)

What we changed

Brand new and bigger data

The tool now runs on the full Profit Ability 2 databank: 2021–2023 econometrics from 141 brands, across 14 categories (Seven reported individually) and 10 media channels, representing £1.8bn of ad spend.

Access Profit Ability 2 benchmarks instantly

With a few clicks, you can now pull in the Profit Ability 2 benchmarks and see short- and full-term, media-driven profit contribution and ROI by channel for your chosen category.

Optimise to different time horizons

Different businesses need different payback windows.

The tool now optimises media mixes at 1-week, 3-month, and 2-year horizons, helping users tailor strategy to the window that matters.

More flexibility

Budget exploration is easier. Select your budget and the tool shows the recommended mix for that level, plus two levels above and below, so you can instantly see how allocations and ROI shift.

Enhanced risk management

With risk now front of mind, the tool offers four risk levels.

It shows the expected budget allocation, revenue and ROI for all four, plus the performance range at each level based on statistical confidence. Users can see the effect of raising or lowering risk tolerance and adjust instantly.

[Access the tool here](#)

What people said

The Media Mix Navigator has brought a brilliant fundamental level of insight into our capital allocation and planning processes. Using this tool, we are able to sense check our models and ensure that we are incorporating some of the broader trends in advertising effectiveness and travel competitors into our decision-making. The tool raises the bar for evidence-based business planning and is a crucial tool for any UK marketer.”

Rory Allinson, Media Strategy, Expedia Group

The Media Mix Navigator has quietly become the industry’s default planning compass. It’s in the decks, in the meetings, in the decisions – whether you’re a global brand or an SME. It’s giving marketers increased confidence to back long-term brand investment and filled a vital gap for teams without access to econometrics. It’s not just useful, it’s often essential.”

Eva Grimmett, Chief Strategy Officer, PHD

Thinkbox introduced the Media Mix Navigator to us last year. It has been really useful for some of our smaller brands who don’t have the budgets to do their own econometric modelling to optimise their media plans and spend. The tool is easy to use and the normative database provides reassurance that recommendations are robust.”

Nic Keeley, Group Head of Insight, Samworth Brothers

Staying Power: The longevity of advertising

What is it?

What good is an ad if its impact barely outlives the campaign? And, if decay is inevitable, which media genuinely keep working, and which only look effective in the moment? All impressions are not equal – and some make a more lasting impression.

This landmark study of 20,000 people – produced with Tapestry Research – revealed the longevity gap between channels. It showed that TV sustains purchase intent longer than any other medium, that social media decays fastest (even among under-35s), and that VOD uniquely endures for younger audiences.

It also revealed that TV isn’t just strong on its own; it slows the decay of every other channel in the mix, boosting their contribution. TV is the battery that powers other media.

And it proved why: TV’s shared, in-home viewing environment – big screens, emotional resonance, people watching together – fundamentally strengthens memory, trust and purchase intent.

What we found

Different media have different staying power

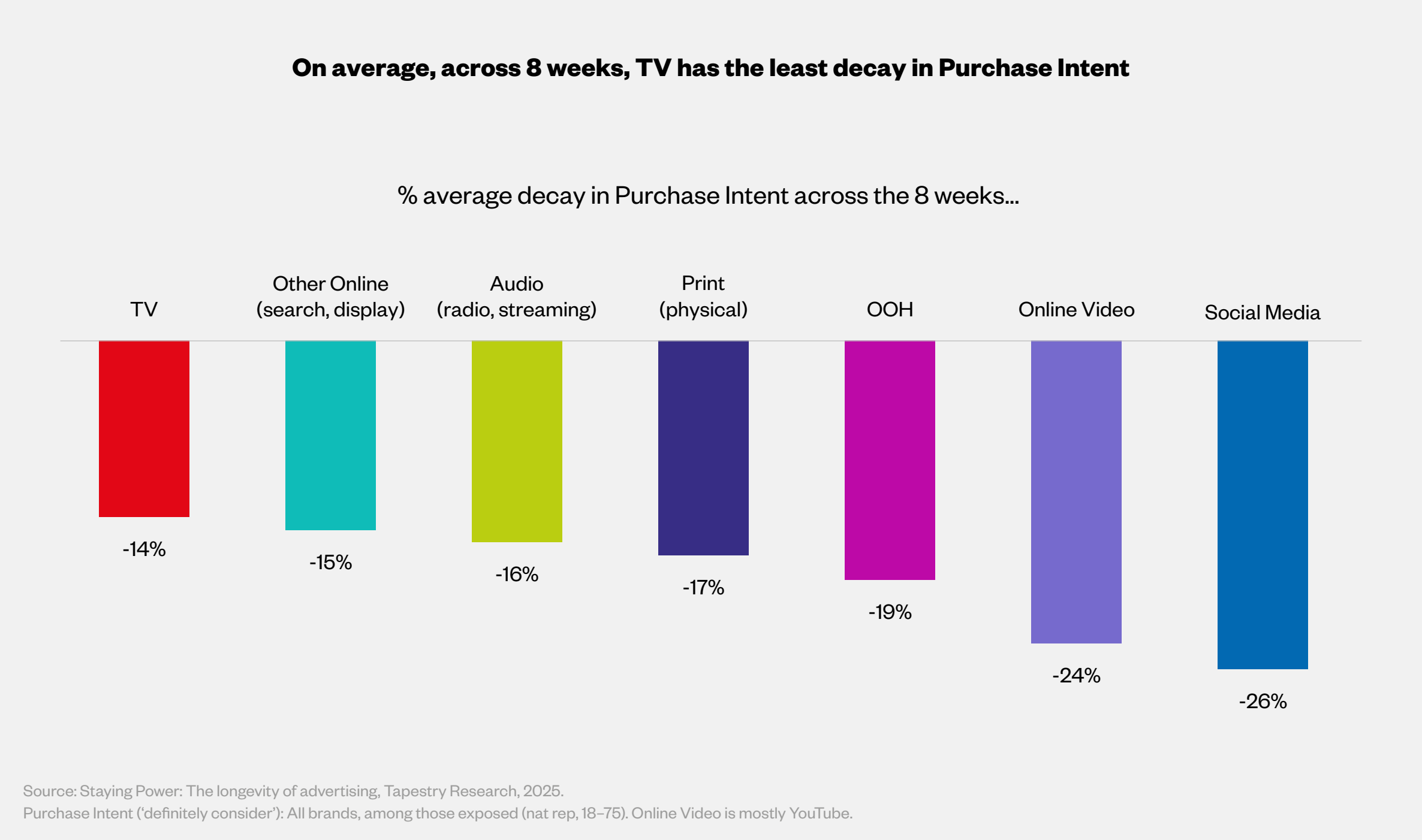
- TV’s impact on purchase intent drops only 14% over eight weeks – the lowest decay of any medium.
- Social Media decays fastest, with a 26% fall. Audio declines 16%, Print (physical) 17%, OOH 19%, Online Video (mainly YouTube) 24%, and Other Online (search, display, etc.) 15%.

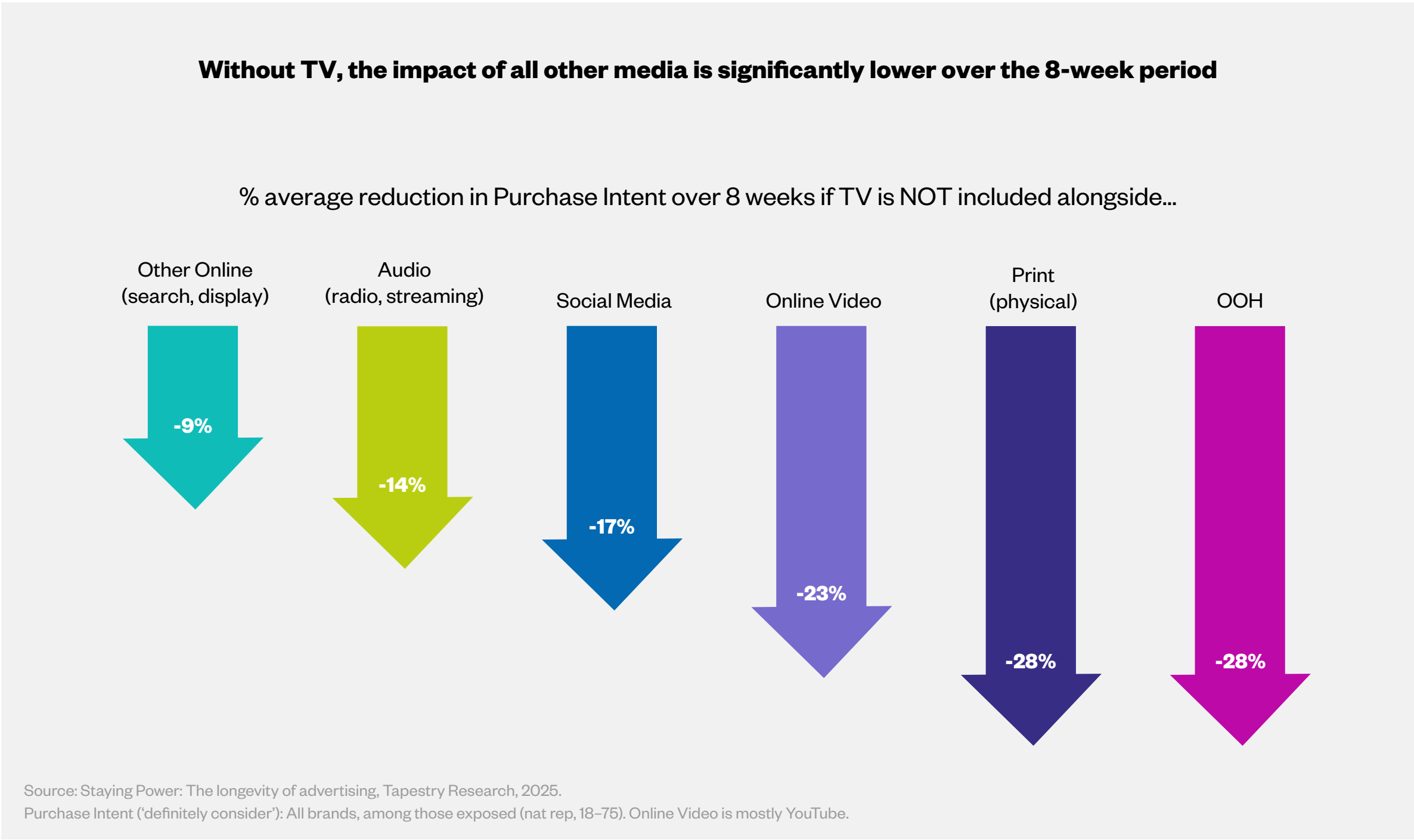
Under-35s are harder to keep influencing

- Among 18–34s, purchase intent drops 29% over eight weeks vs. 16% for ages 35–75.
- Decay is steepest for this group in online video (36%) and social (42%).
- VOD delivers the strongest sustained effects for under-35s, with a decay 17% less severe than average.

TV’s shared experience makes a lasting difference

- TV works harder because it’s usually watched on a big screen, in the living room, with other people.
- Shared viewing slows decline: 48% lower decay when exposed to TV ads with others (vs. watching alone).
- Ads are liked 75% more when watched with others.





TV sustains the impact of other media

- TV amplifies other media channels: when included, it lifts their impact on purchase intent by an average of 26%.
- Without TV, eight-week declines in purchase intent steepen: OOH –28% lower without TV, Print (physical) –28%, Online Video –23%, Social Media –17%, Audio –14%, Other Online –9%.

+26%

TV amplifies other media channels: when included, it lifts their impact on purchase intent by an average of 26%.

[Download the research here](#)

What people said

“The Staying Power research by Thinkbox offered eye-opening insights into the longevity of TV advertising and its unique ability to boost the impact of other media channels. The study’s findings, like TV’s role as the ‘battery’ that charges other media and the powerful effect of shared viewing, are invaluable for shaping future campaigns.”

Holly Turner, Brand Specialist, Vodafone

“Yet another category-defining Thinkbox study. We know TV doesn’t just work, it makes everything around it work harder, and Staying Power gives us a powerful new way to understand TV’s profound catalytic role across the media mix. It’s a clear warning to any brand tempted to cut TV: it isn’t a saving, it’s a mistake that undermines everything else.”

Andy Collins, Head of Planning, Wavemaker

“Extremely valuable research in assembling media plans, understanding the role and long-lasting impact of each channel.”

Research launch attendee

Trust Transformed

What is it?

Trust isn't just what you say, it's where you say it. What good is a great message if people don't trust where they see it?

IPA Effectiveness Databank analysis shows trust is now the second most important metric linked to business effects, behind only product/service quality. Trust is a commercial driver, not just a concept. So why has the industry been behaving as if trust is universal, static, or simply a creative issue?

In a world saturated with misinformation, scams and low-quality media environments, Trust Transformed reframed trust from a soft concept to a hard commercial driver.

Bringing together insights from the IPA Effectiveness Databank, WPP's Brand Asset Valuator, academic research and new Tapestry Research work, it revealed that trust is deeply category-specific, it rubs off on brands, and trust perceptions differ by generation.

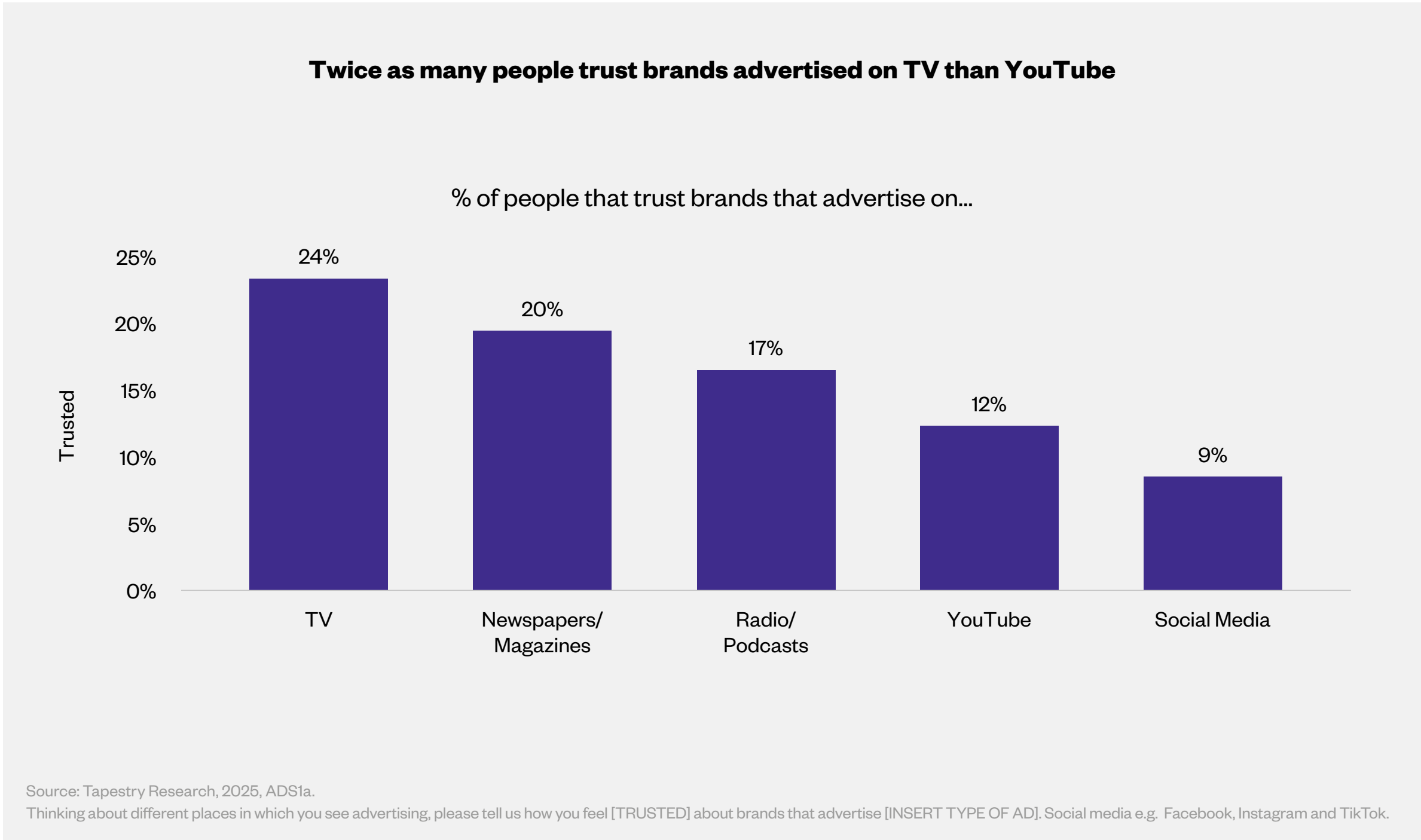
Trust Transformed offers marketers practical advice: treat trust as measurable, align it to category and audience, and choose environments that add credibility rather than drain it.

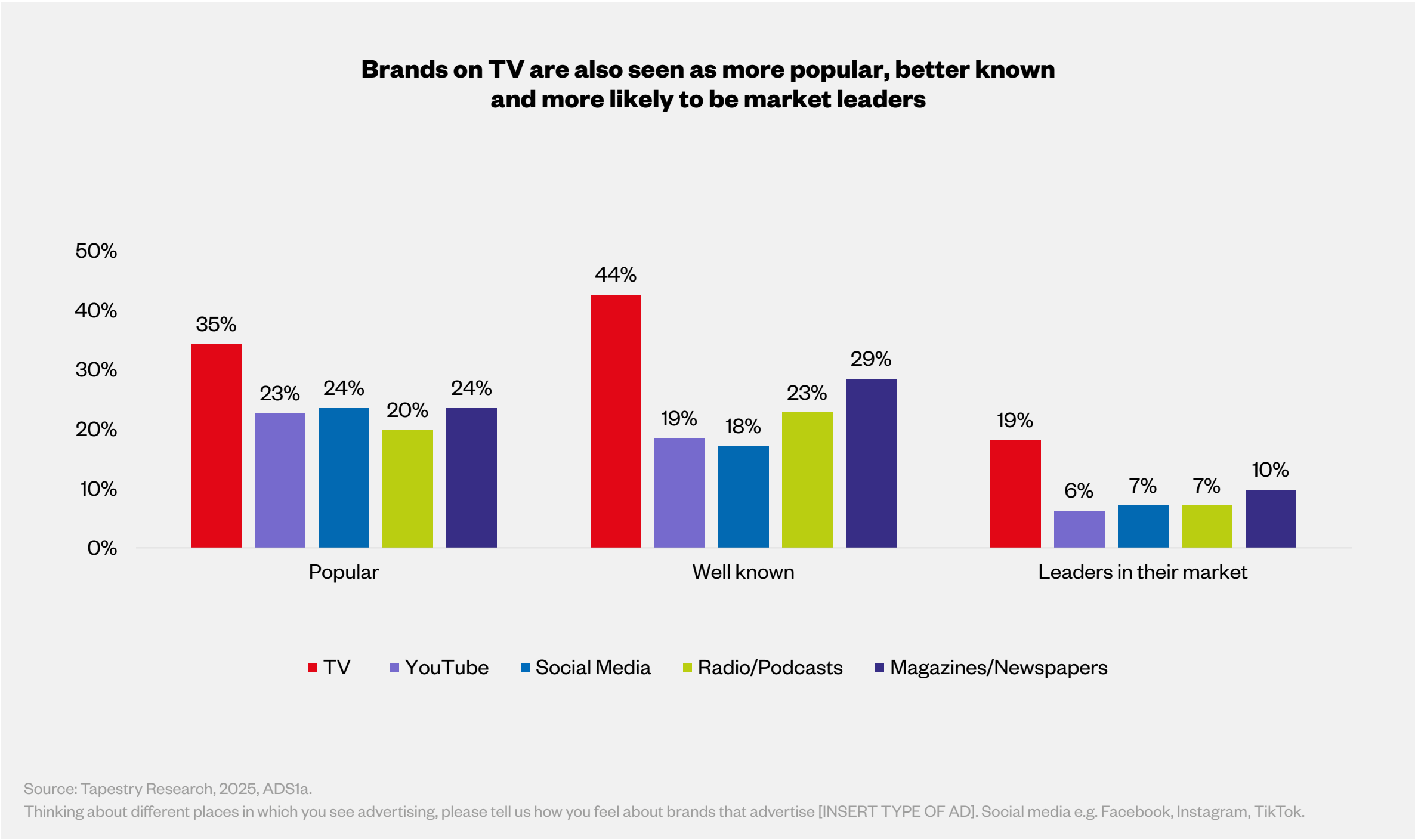
88%

88% of categories have a moderate to strong correlation between best brand and trust.

What we changed

- Trust is category-specific, not universal**
Data from 1,463 brands across 145 categories in WPP's Brand Asset Valuator revealed:
- 88% of categories show moderate to strong correlation between trust and being the best brand.
 - High-risk categories (finance, charities, or prophylactics) show the strongest relationships.
 - Functional categories still show meaningful correlations.
 - A tiny minority (e.g. perfume, political parties) show weak or negative correlations.
- Trust rubs off**
- Research by California State University and Tapestry's fieldwork show people trust brands more when their ads appear on trusted platforms. The environment shapes perception.
- TV transfers the most trust**
- Tapestry found that brands that advertise on TV are more trusted than any other channel – with double the trust score of YouTube (24% vs. 12%) for example, and nearly triple that of social media.
 - Brands on TV are also seen as more popular (35% vs 23% average for other channels such as Newspapers/ Magazines, Radio/Podcasts, YouTube, Social Media), better known (44% vs 22%), and more likely to be market leaders (19% vs 8%).





Trust works differently by generation

- Under-35s trust brands 12% more than over-35s. Over-35s are more sceptical and use trust as a strict filter before considering other attributes.
- For over-35s, trust is the primary battleground so use channels that transfer credibility. Once the trust filter is passed, compete on quality and reliability, all things TV communicates well.
- For under-35s, the battleground is trust plus differentiation, so you need channels that deliver credibility and cultural relevance, which TV has in spades through shared cultural moments.

Media choices can strengthen or undermine trust

- Brands can choose trustworthy environments with editorial standards and professional content, or risk trust erosion in spaces flooded with misinformation and harmful content.

+12%

Under-35s trust brands 12% more than over-35s.

What people said



The Power of Trust research was a comprehensive analysis of trust in advertising across different channels. As an in-house media team, the research was beneficial across disciplines and teams. The trust signalling and trust metrics in professional content was especially interesting given the increasingly digital world we are inhabiting alongside fake news.”

Eleonora Sceusi, Senior Media Specialist, Hotels.com & Expedia Group Advertising



This is such a fascinating new way of appreciating the value of trust in advertising. A typically Thinkbox intervention to keep industry thinking and practice on the right track, fuelled with proper insight. Cheap reach is cheap for a reason, and it cheapens your brand.”

Emma Moorhead, Head of Implementational Planning, WPP



Brands must be careful about the company they keep – not just reputationally, but financially. This study makes that crystal clear. The media landscape is polluted with environments that erode trust, and this new work offers clear, evidence-based guidance on where brands should show up if they want to reap the commercial benefits of trusted media.”

Monica Majumdar, CSO Reach



Impactful research on the importance of trust. We should be talking more to our clients about trust and TV.”

Research launch attendee

[Take a look](#) at more research covering why trust matters in advertising and why TV is trusted

Why the Eff would you cut TV?

What is it?

Why the Eff Would You Cut TV? by WPP Media looked at real-world campaigns to explore what happens when you take TV out of the media mix.

It revealed that cutting TV lights a bonfire of effectiveness. It leaves billions in profit on the table and weakens entire media plans. Profit Ability 2 had provided a mountain of evidence to prove why to invest in TV; this study laid bare why not to disinvest.

We'd expected to show that cutting TV was a risk. We never expected quite how bad it actually was. The study found that TV advertising is immense by itself, but it makes digital channels work much harder too. Cutting TV weakens the very channels many marketers expect to drive the short-term results they didn't think TV could deliver. Cutting TV is like taking the engine out of a car.

What we found

The findings were stark. Choosing to remove TV in totality is always sub-optimal:

Immediate damage

When TV was removed entirely from a media plan, average profit in three months dropped by 24%, despite the same total media budget being redistributed elsewhere amongst remaining channels.

Long-term profit decimated

Over a two-year window profits dropped by nearly 60% without TV.

£28 billion up in smoke

This is the total profit at risk for British business from suboptimal allocation away from TV across a two-year window – and this at a time when the news was dominated by “a £20 billion black hole in the public finances”.

Tarnished halo effect

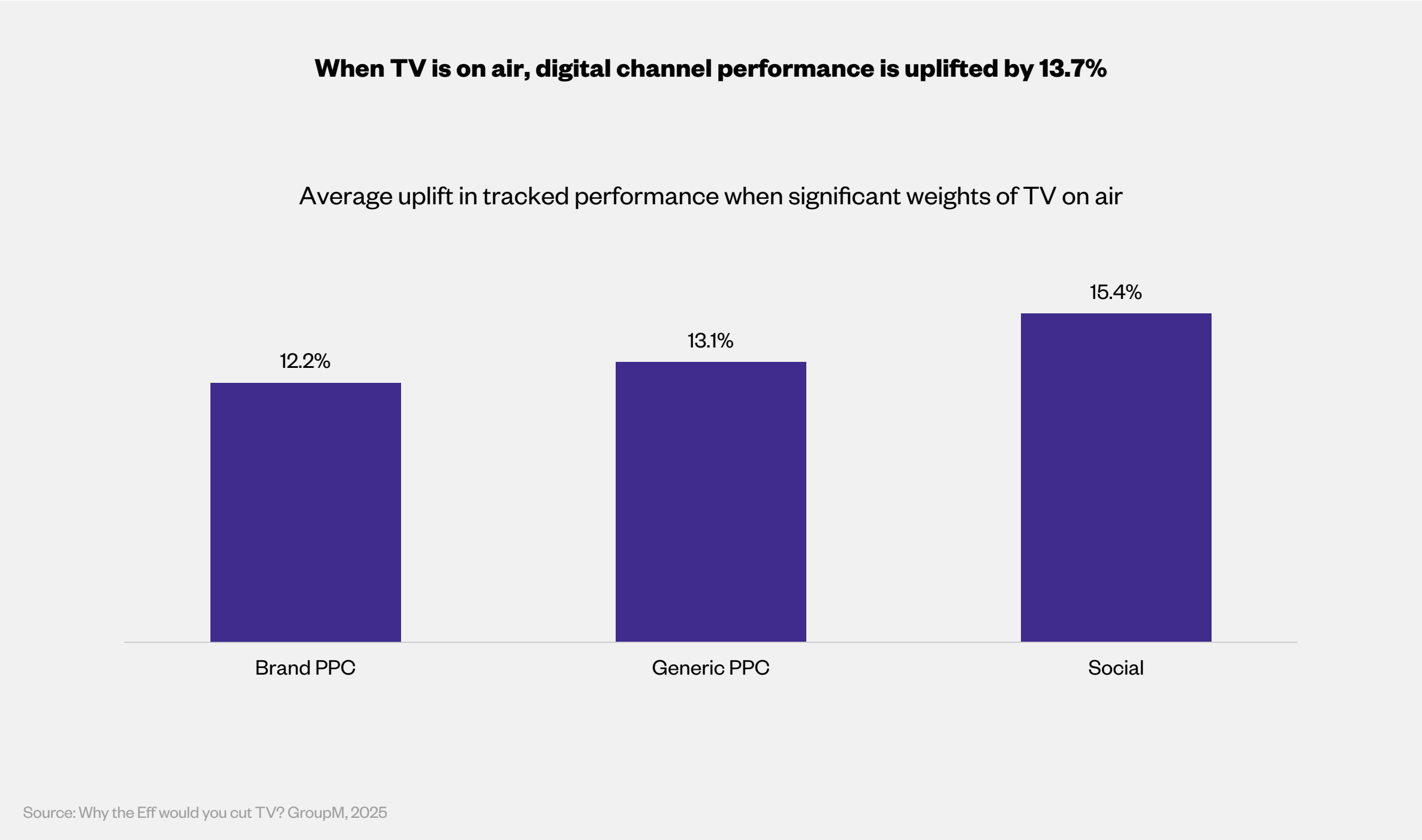
On average, lower funnel response channels like PPC and Social see a 13.7% improvement in performance when TV is live. Take TV away and it drains their power.

What people said

- We've always known the effect that TV has on performance metrics but seeing the reverse – what happens when TV isn't there – was fascinating. It was a critical reminder for clients and agencies that we must always think strategically about the big picture – not just the right now – when we have to make budget cuts.”


Faye Gilman, Head of Client Leadership, OMD
- This approached effectiveness from a fresh angle and was exactly what the industry needed. The findings are impossible to ignore: cutting TV might save some money, but it destroys profit and undermines other media. It's already changing the way we think about short-term cuts and long-term growth. A great example of how trade body research can genuinely shift industry behaviour.”


Lucy Collier, Strategy Partner, PHD





The Best of the Rest


Here you can explore a wealth of links to other recent studies that deserve your attention. We've put together some recommendations, giving you quick access to valuable insights you should be aware of.


**The Performance Multiplier**
Radiocentre


**Gen Z: Trends, Truth and Trust**
Channel 4

**Unlocking the Power of Premium**
Vevo & Channel 4

**The Cost of Dull Media**
Professor Karen Nelson-Field, Amplified

**Creative Boost**
ITV

**Go big or go home**
Les Binet (Binet Consulting) & Will Davis (Medialab Group)

**State of Marketing Europe Report 2026**
McKinsey

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