

The Brand Effect: perception, planning and profit



Welcome

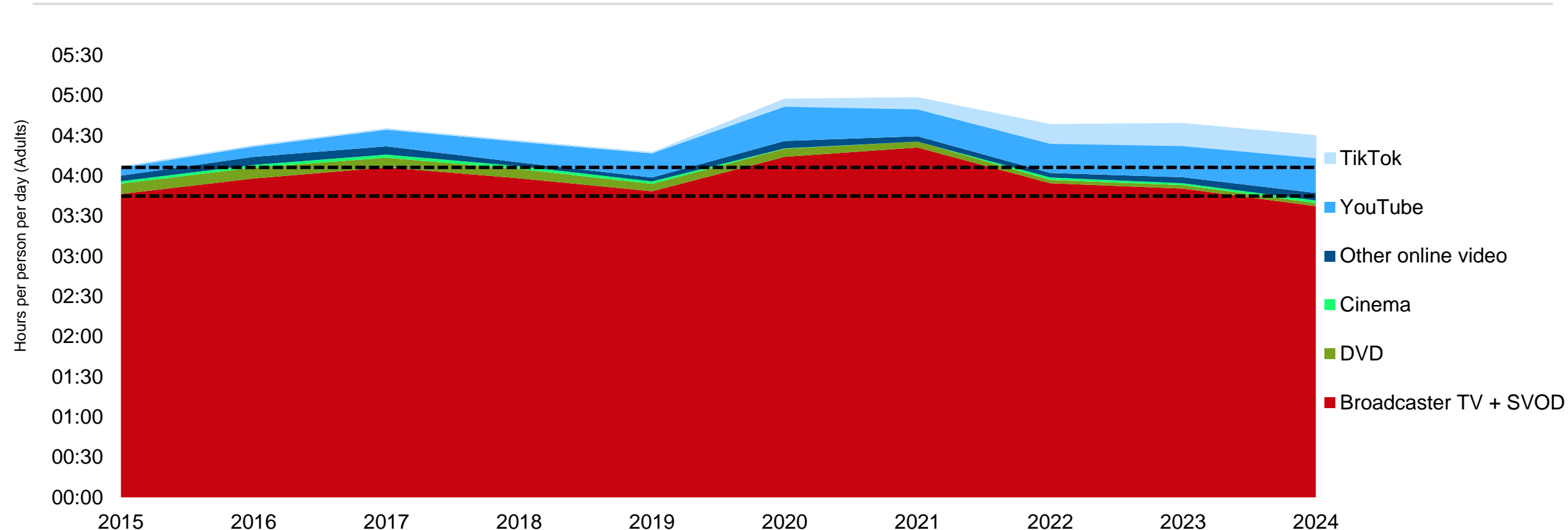
Anthony Jones, Head of Research
Thinkbox



A quick viewing landscape update

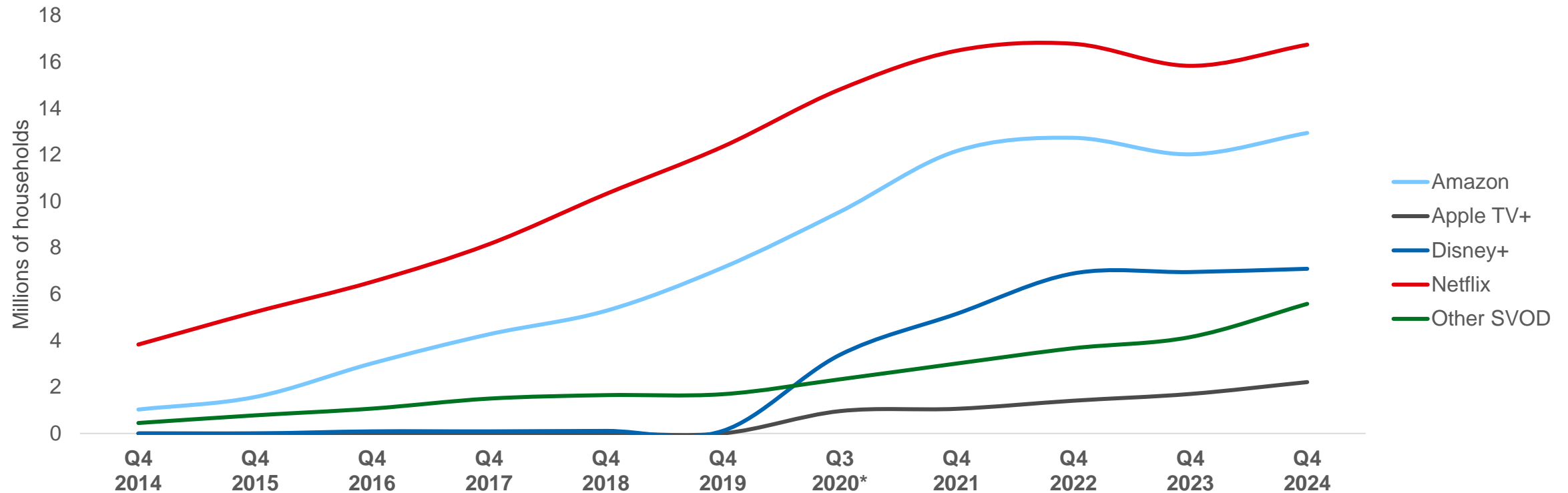


Stability continues...



Source: IPA TouchPoints, Adults 15+

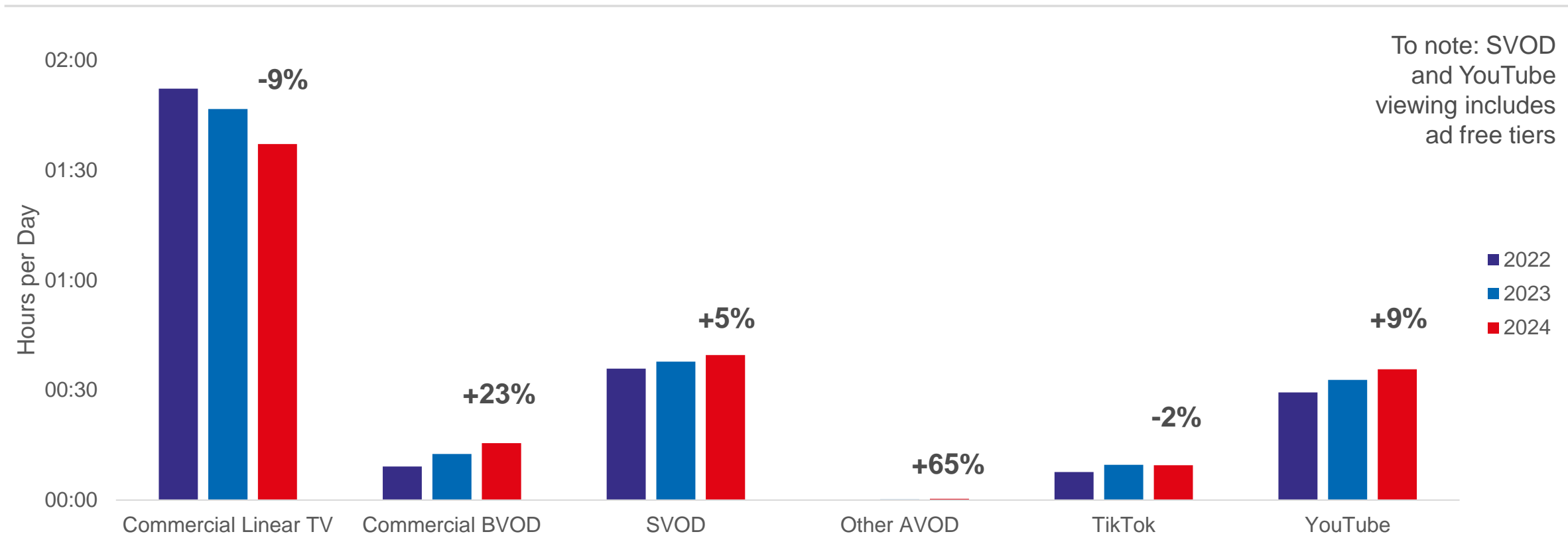
SVOD subscriptions returned to growth



Source: Barb Establishment Survey

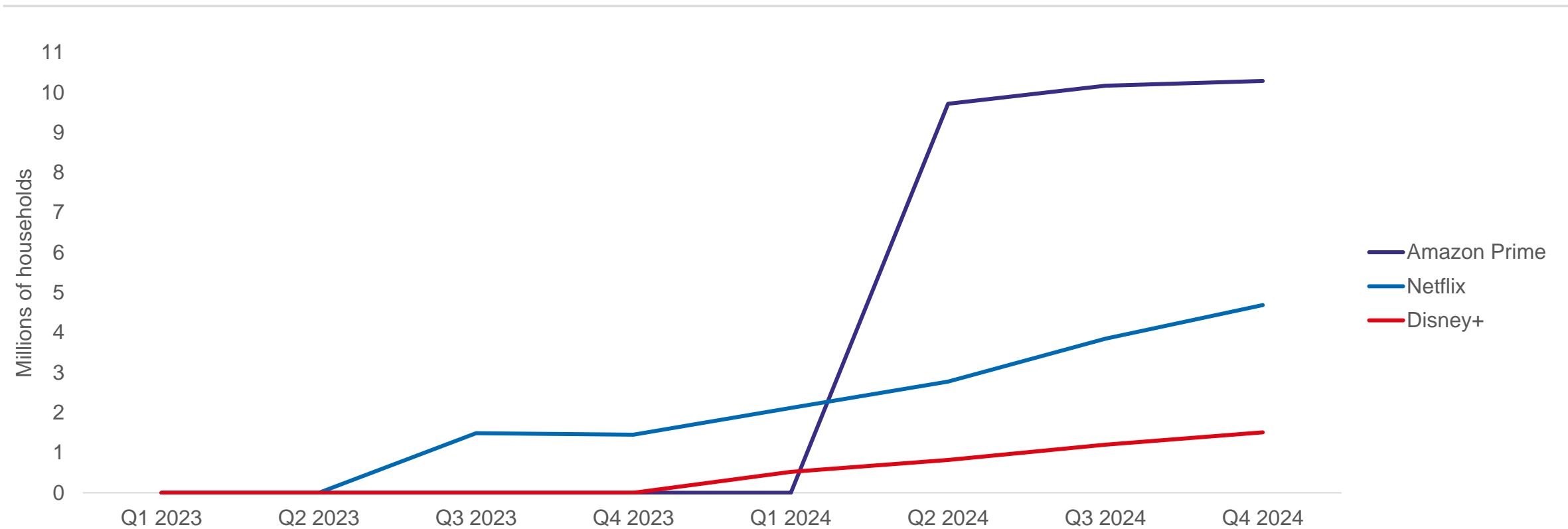
* = Due to the COVID-19 pandemic and the suspension of face-to-face interviewing, quarterly BARB Establishment Survey data were not produced for Q4 2020, as a result, 2020 Q3 data is used

The gradual shift of viewing from linear to VOD continues



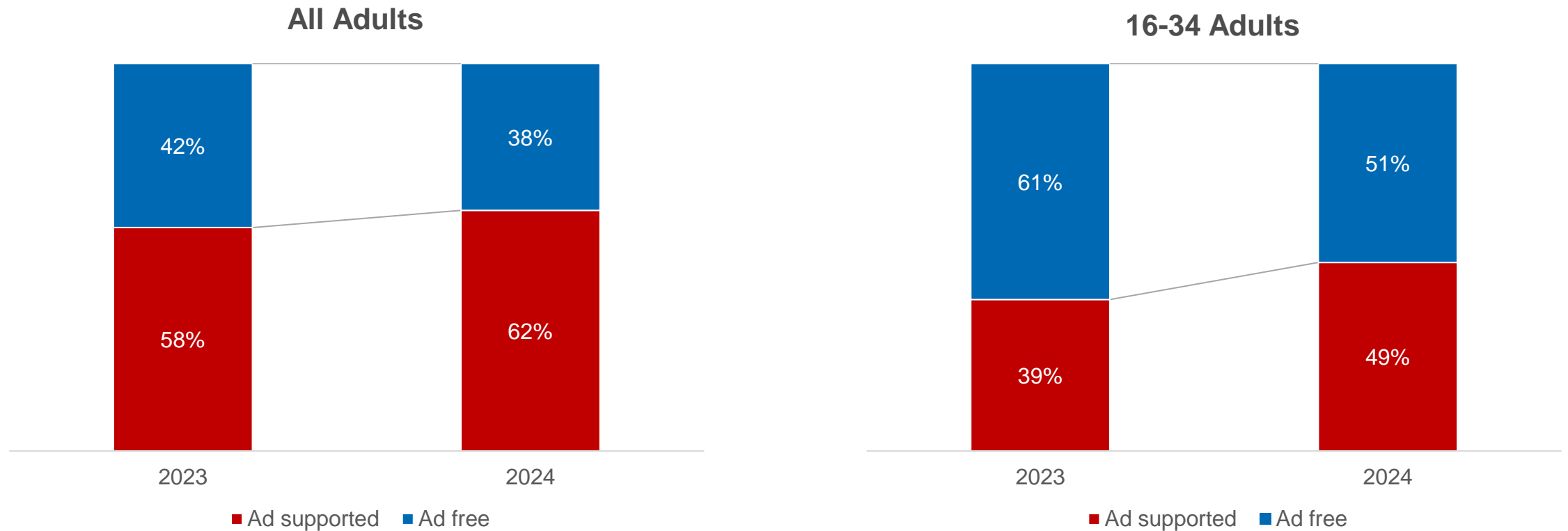
Source: Barb, All devices, Adults 16+, Total commercial linear TV and BVOD
% difference based on 24 vs. 23

SVOD ad tier growth increasing high quality TV inventory



Source: Barb Establishment Survey, subscription to ad-tier service

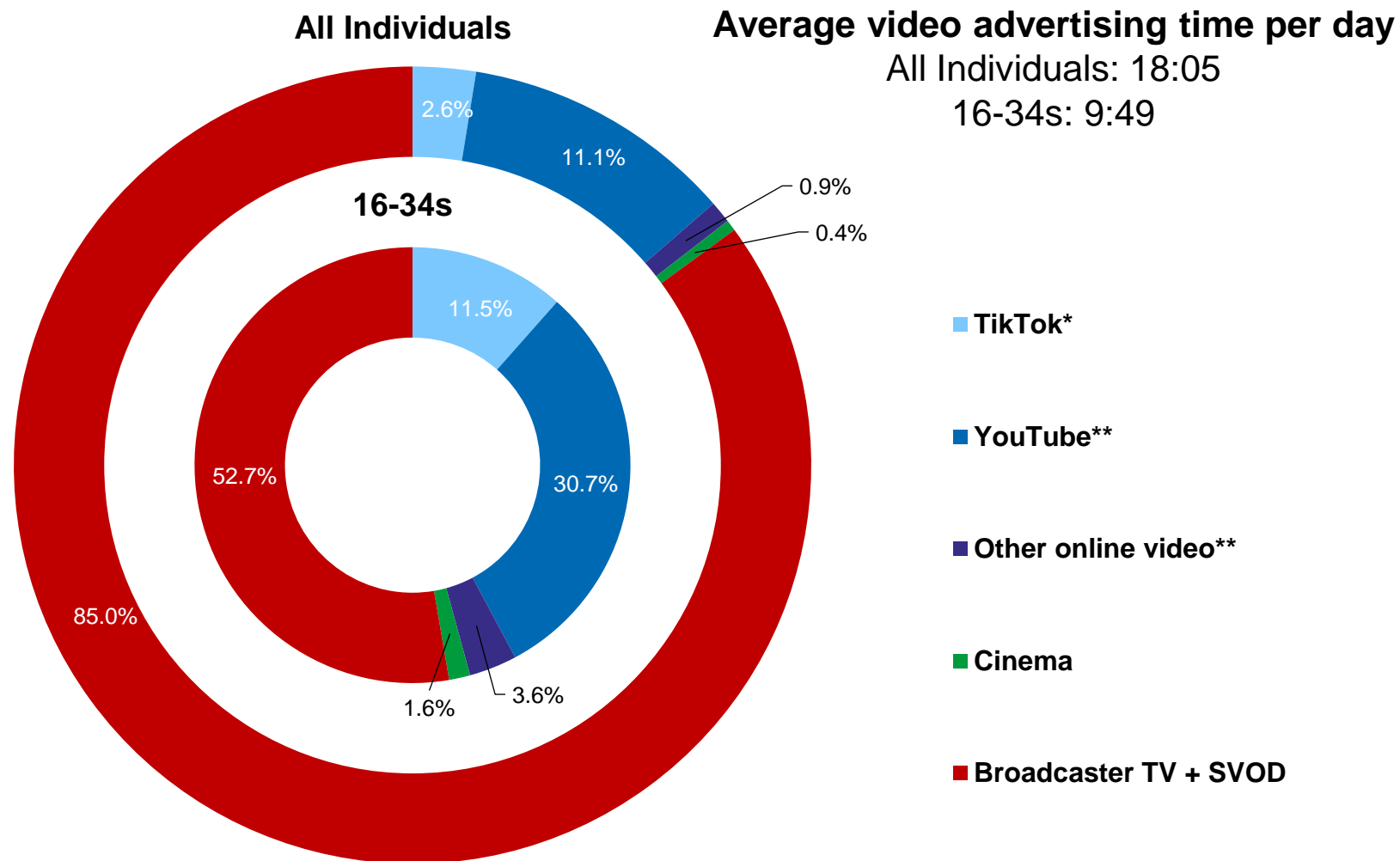
More opportunities for advertisers as viewing to ad-supported quality content grows



Source: Barb – TV set viewing

Today's TV accounts for 85.0% of AV advertising time

(vs 83.5% in 2023)

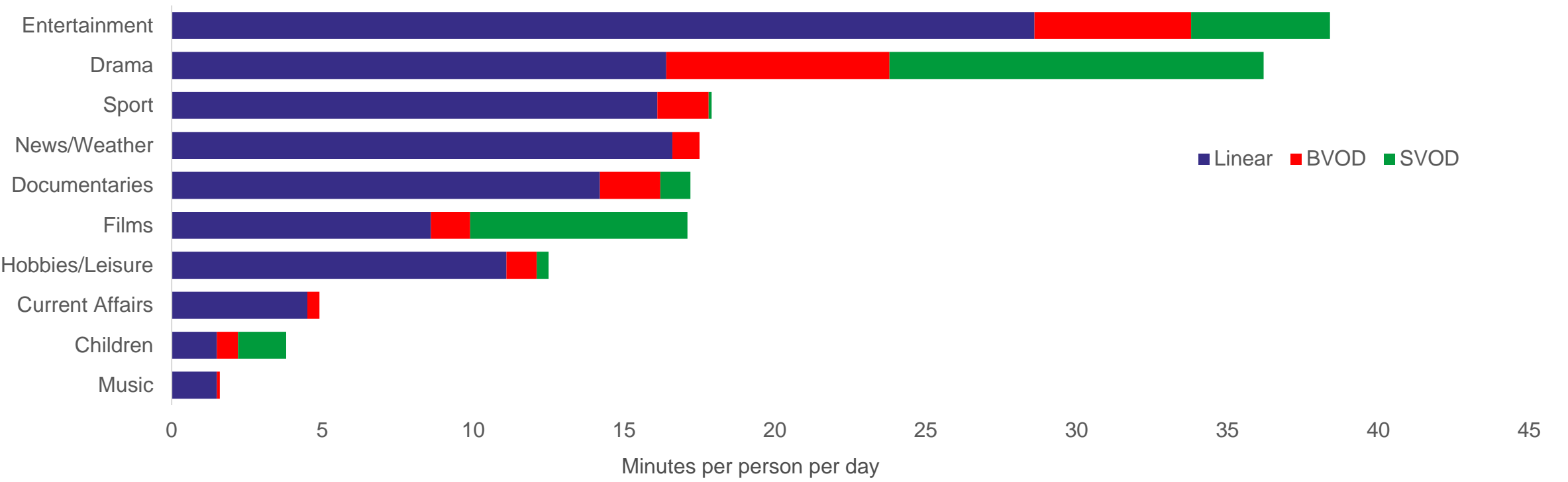


Source: 2024, Barb / Broadcaster stream data / UK Cinema Association / Ipsos Iris

**YouTube ad time modelled at 3.33% of content time (Enders Analysis, 23rd October 2024) and excludes those estimated to be on the YouTube Premium tier.

*TikTok ad time modelled at 3.4% of content time using agency and broadcaster estimates. **Other online modelled at 3.33% of content time.

VOD enabling us to watch more entertainment, drama & films



Source: Barb - TV set only, Adults

Adults: UK original content dominates the top series in 2024

Rank	Channel Group	Programme Title	Series	Average Audience (m)	Origin
4	Amazon	Clarkson's Farm	3	8.9	UK
5	Netflix	The Gentlemen	1	8.7	UK
6	ITV	Vera	13	8.5	UK
7	BBC	Ludwig	1	8.4	UK
8	BBC	Death in Paradise	13	8.4	UK / France
9	ITV	I'm a Celebrity... Get Me Out of Here!	24	8.2	UK
10	ITV	Trigger Point	2	8.2	UK

Rank	Channel Group	Programme Title	Series	Average Audience (m)	Origin
11	CH4	The Great British Bake Off	15	7.8	UK
12	BBC	Call the Midwife	13	7.7	UK
13	BBC	Strictly Come Dancing	22	7.6	UK
14	ITV	After the Flood	1	7.6	UK
15	ITV	Red Eye	1	7.5	UK
16	BBC	The Traitors	2	7.5	UK
17	BBC	Silent Witness	27	7.3	UK
18	ITV	Until I Kill You	1	7.0	UK
19	BBC	Nightsleeper	1	7.0	UK
20	BBC	Celebrity Race Across the World	2	6.9	UK

Source: Barb, 2024, Adults. TV set viewing. Average audience per episode (excludes one-offs, kids, films and sports)

Similar programmes & size to 10- years ago... but now watched in different ways

Rank (2014)	Channel	Programme Title	Series	Average Audience (m)	Origin
1	BBC 1	Sherlock	3	11.7	UK
2	BBC 1	Call the Midwife	3	10.6	UK
3	ITV1	Downton Abbey	5	10.4	UK
4	BBC 1	The Great British Bake Off	5	9.5	UK
5	BBC 1	Strictly Come Dancing	12	9.5	UK
6	ITV1	I'm a Celebrity Get Me Out of Here!	14	9.3	UK
7	ITV1	Cilla	1	8.8	UK
8	ITV1	Britain's Got Talent	8	8.7	UK
9	BBC 1	Death in Paradise	3	8.6	UK
10	ITV1	The X Factor	11	8.2	UK

Source: Barb, 2014, Adults. Consolidated 28 Day. Average audience per episode (excludes one-offs, kids, films and sports)



TSB, "Business"

“The context within which you see something affects how you react to it”





Context Effects

2024

**Practical guidance and
evidence on the in-home
contexts that deliver for
advertisers**

tapestry

MAP THE
TERRITORY

thinkbox

6.3x

The right in-home advertising context can increase ad recall by up to 6.3 times

Source: Context Effects, Map The Territory & Tapestry Research, 2024

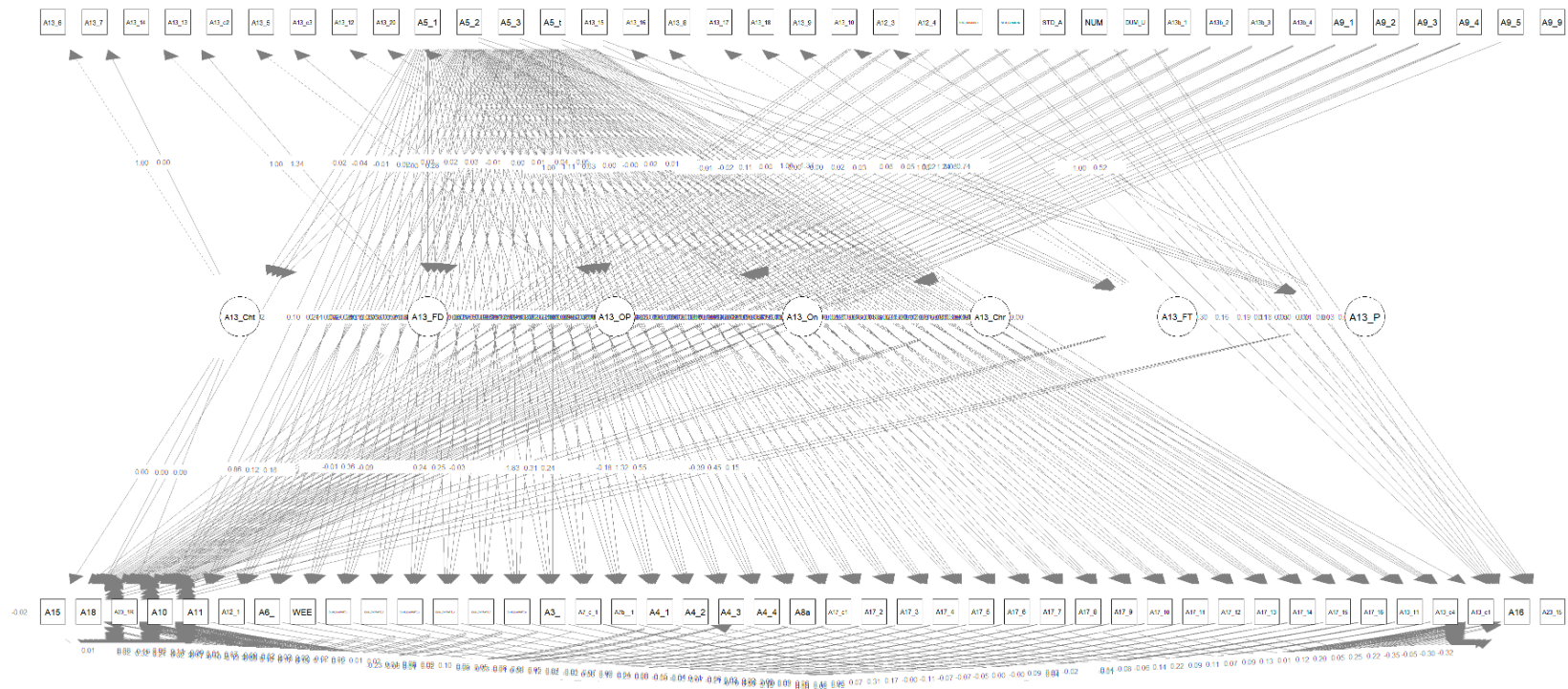
Ecosystem quantified via Structural Equation Modelling

348,435

data points

87

different variables



Source: Context Effects, Map The Territory & Tapestry Research, 2024

Factors having biggest influence on advertising recall

DEVICE



OTHER PEOPLE



CONTENT



MOOD



SATISFACTION



LOCATION



Source: Context Effects, Map The Territory & Tapestry Research, 2024

Factors having biggest influence on advertising recall

DEVICE



OTHER PEOPLE



Source: Context Effects, Map The Territory & Tapestry Research, 2024

Shared viewing is important

Ad recall +23% when watching with others vs. alone

2x more likely to repeat / mimic the ads (increasing to 3.2x when watching with kids)

Source: Context Effects, Map The Territory & Tapestry Research, 2024

Why is the TV set so important?

TV screen drives highest ad recall:

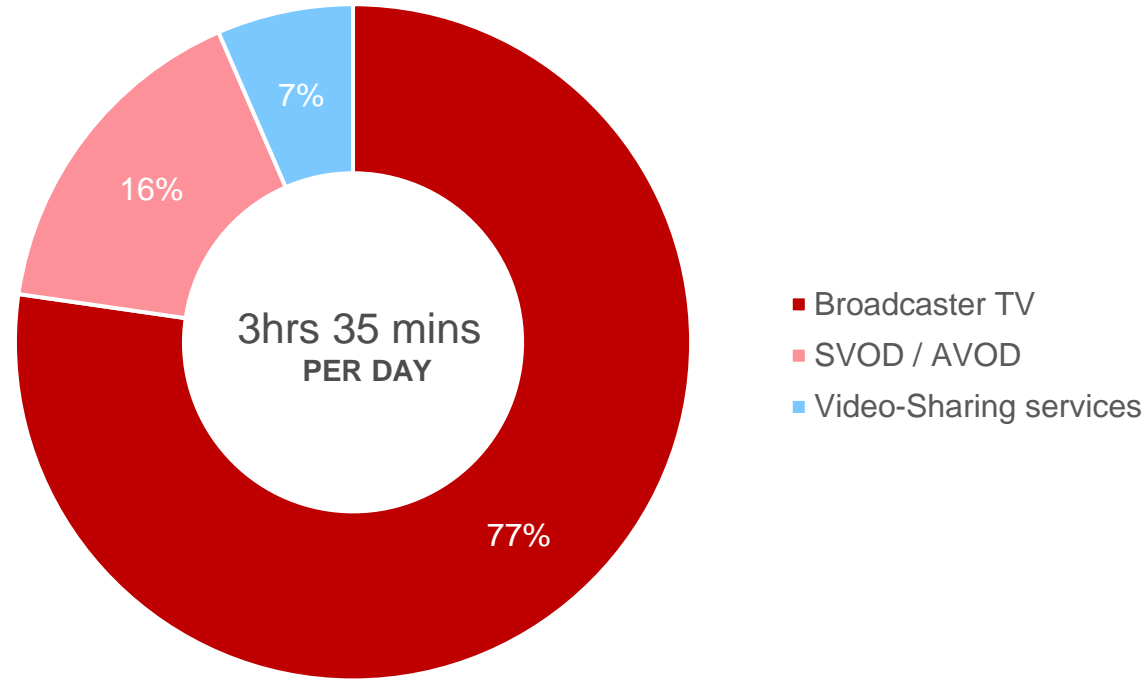
+34% vs. computer

+60% vs. tablet / smartphone

Source: Context Effects, Map The Territory & Tapestry Research, 2024

93% of TV set viewing is to high-quality TV content

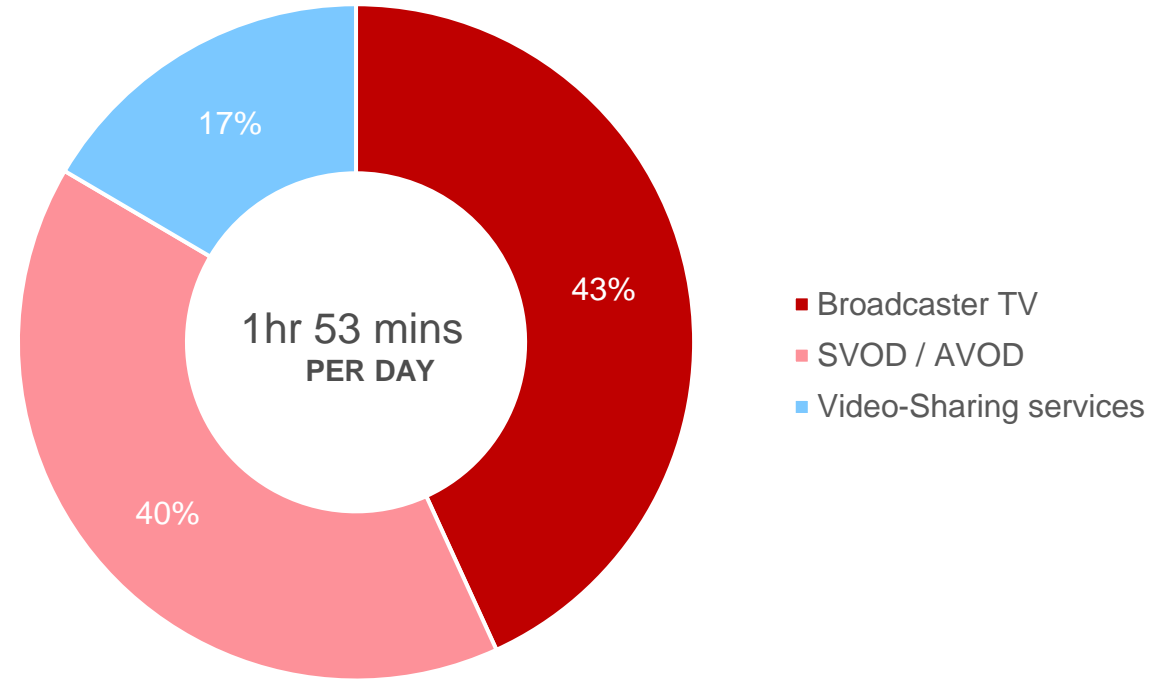
TV set viewing time by platform
2024, All Adults



Source: Barb

For 16-34s, the TV set is for... high-quality TV content

TV set viewing time by platform
2024, 16-34s



Source: Barb

In summary...



Stable viewing landscape



TV advertising opportunities increasing



Context is vital – especially TV sets and shared viewing



YouTube growing but only 7% of adult TV set viewing

TV is in a positive place...

...but key questions exist about advertising investment



From Brand to Bland 2

Sarah Davies, Global Founder
The Behavioural Architects

THE *BEHAVIOURAL* ARCHITECTS

Global insight, research
and strategic
consultancy.

Using the latest thinking
from the Behavioural
Sciences to help
organisations better
understand and influence
behaviour.



Four Behavioural Science pillars shed light on why we think and do what we do



1.

Much of what influences our behaviour is subconscious



2.

We have different modes of thinking – System One & System Two



3.

Context hugely influences the decisions we make



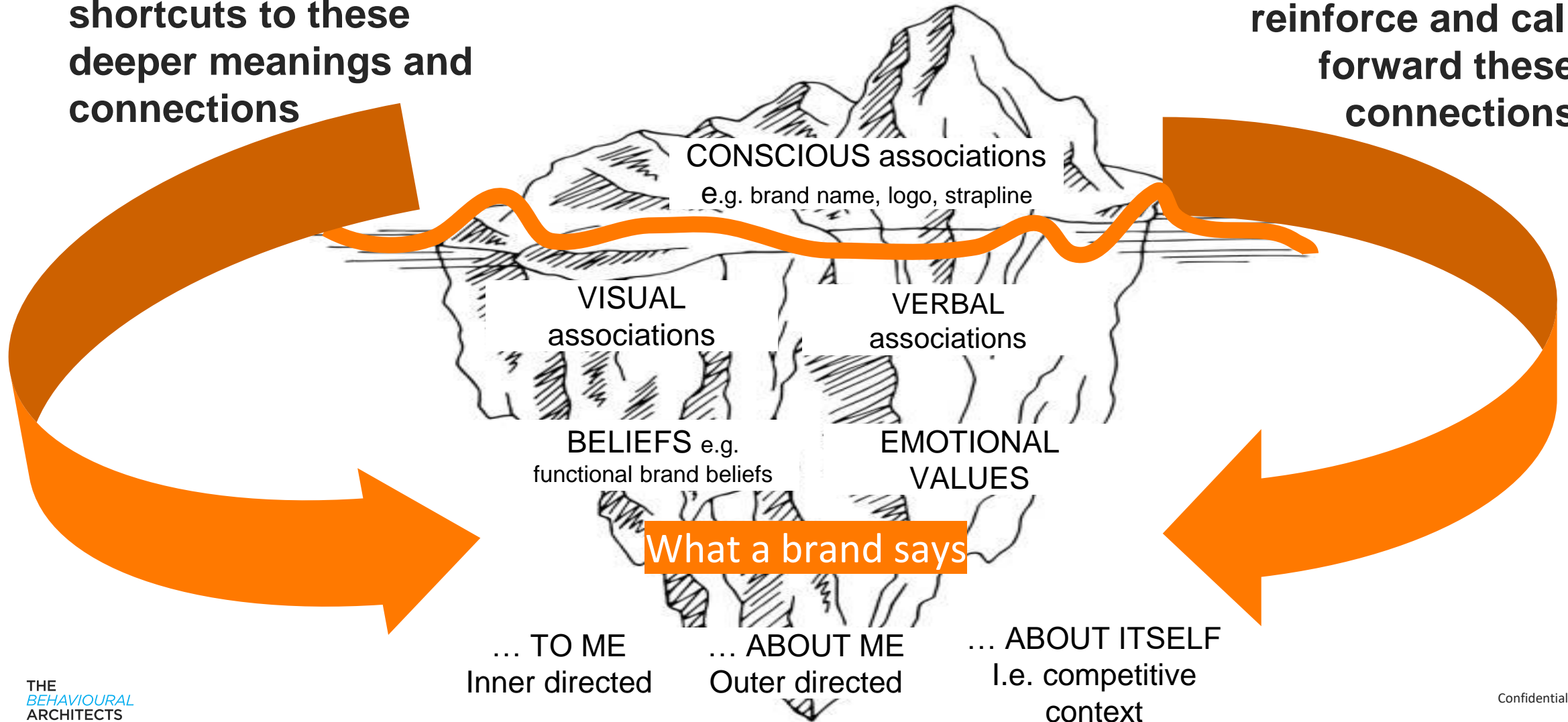
4.

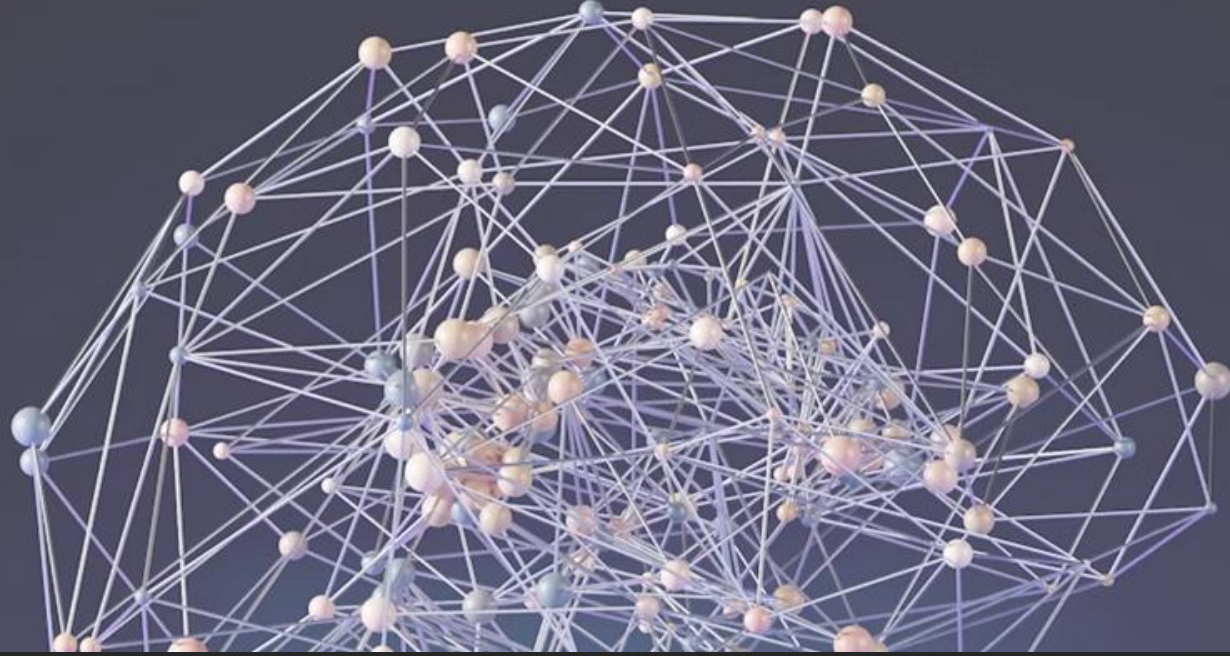
We are subject to a mass of cognitive biases

TV advertising lays down deep subconscious brand impressions over time

Brands act as shortcuts to these deeper meanings and connections

More recent ads both reinforce and call forward these connections





BE concepts and frameworks help us better understand how our brains store, recall and respond to brands

TV advertising leverages cognitive biases even before deeper brand connections are built



Affect bias



Mere Exposure Effect



Recency Effect



Costly Signalling



And at a deeper level Behavioural Science helps makes sense of how brands play to the innate wiring of our brains



We set out to test the hypothesis that in the current context, building a strong brand is more important than ever...

*“A product can be quickly outdated, but
a successful brand is timeless.”*

Stephen King



The value of a strong brand should not be underestimated

Brands build credibility and trust, creating powerful consumer pull

87% of customers will pay more for products from a brand they trust

Source: Salsify

Not all brands are built equal...

Strong brands consistently command prices up to twice those of weaker competitors

Source: Google/Kantar, DE, UK, The Effectiveness Equation, Feb. 2025.

Brand is the second most important consideration when evaluating a business

76% agree that brand has a meaningful impact on valuation

Source: Interbrand

We tested our hypothesis by taking 16 brand lovers on an experimental journey...



Ashley



Melissa



Jeanette



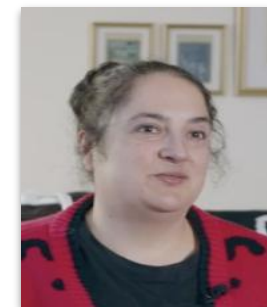
Matthew



Fabienne



Gemma S



Claudine



Chris



Rowena



Johnny



Ebony



Elaine



Sharon



Kevin



Lesley



Gemma H

method®

Oral-B



TAYLORS of HARROGATE
YORKSHIRE
TEA

CeraVe®
DEVELOPED WITH DERMATOLOGISTS



Simple®

VO5®

BULL
DOG
SKINCARE FOR MEN

Flash®

Kiehl's
SINCE 1851

ESTD 1814
Colman's
OF NORWICH

Colgate®

ESTD 1901
LURPAK®



Diet
Coke



MIGHTY
OATS

Napolina
CREATO A NAPOLI

Sanex

CLIPPER®
NATURAL, FAIR & DELICIOUS®

Kellogg's®
CORN
FLAKES

SENSODYNE



Dove



PANTENE

The following presentation included a number of videos of consumers talking about brands.

The films are not included in this summary but will be released later via the Thinkbox website.

Our participants have strong emotional connections with their brands...

In a world of turbulence and overwhelming choice
brands help us navigate complexity

And in a world in flux, brands bring a sense
of reassurance

The background is a vibrant, abstract composition of watercolor splashes and dots. Large, irregular shapes in shades of yellow, orange, blue, pink, and purple are scattered across the frame. These are interspersed with numerous small, circular dots in various colors, creating a dynamic and textured visual field. The overall effect is one of artistic spontaneity and color exploration.

**So what happens when we
take the colour away?**

method.



BULL
DOG
SKINCARE FOR MEN

Flash



Dove

Oral-B

Napolina
CREATO A NAPOLI



Simple

Kiehl's
SINCE 1851



Sanex

Coca-Cola

TAYLORS of HARROGATE
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Diet
Coke



Kellogg's®
CORN
FLAKES



Colgate

ESTD 1901
LURPAK



SENSODYNE

Nando's

PANTENE



A Venn diagram consisting of three overlapping circles. The top circle is red and labeled 'CONNECTION'. The bottom-left circle is yellow and labeled 'STABILITY'. The bottom-right circle is blue and labeled 'IDENTITY'. The circles overlap in the center, creating a central intersection area where all three concepts meet. The background is a dark, out-of-focus bokeh of colorful lights in shades of red, orange, yellow, blue, and pink.

CONNECTION

STABILITY

IDENTITY

Advertising creates, sustains & evolves brand impressions over time



CREATE

Drive salience and build mental availability - ensuring brands are **KNOWN** and **RECOGNISED**



SUSTAIN

Tells & reminds people of a brand's distinctive rewards - ensuring brands are **DISTINCTIVE & DIFFERENTIATED**



EVOLVE

Build new associations that connect with cultural shifts - ensuring brands stay **RELEVANT**

The power of TV advertising: uniquely creates and sustains meaningful brand connections

Lays down deep
and lasting
brand
impressions



SALIENCE

Builds prominence

Fuels Trust in
ways other
channels can't
match



AUTHORITY

Messages that come from
credible authority figures
within a regulated medium



COSTLY SIGNALLING

Demonstrates a brand is
strong and worthy of
attention through
investment

Delivers brand
experiences that
engage & unite



SOCIAL PROOF

Sensing that others must love
and purchase the brand if it
has a prominent position in a
mass medium

What does this mean for you and what you need to do to build a strong, trusted brand?

Strong brands deliver value to people and they are willing to pay more for this value



Investing in building a strong brand will pay off in your bottom line

Brands are meaningful because they are pillars of Stability, Connection & Identity



Important to demonstrate and remind people of the role trusted brands play in their lives

TV advertising is crucial to create, sustain and evolve brand associations



Investing in TV advertising is the most powerful way to grow and maintain a strong brand

The trust people have in TV confers to the brands they see on TV



TV advertising is a crucial mechanic within the marketing mix to build a deep sense of trust in a brand

The social consumption of TV advertising creates shared brand experiences



TV supports brands that bond and that become mainstays across generations

And if you're still not convinced...

the big reveal says it all!



Thank you

For more information, please get in touch with

Sarah Davies, Global Founder

sarah@thebearchitects.com

THE
BEHAVIOURAL
ARCHITECTS

Media Mix Navigator: now fully powered by Profit Ability 2

Jane Christian, EVP Analytics
Choreograph UK

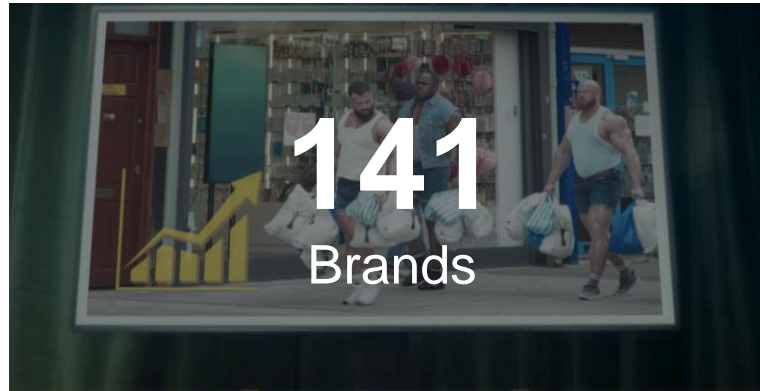
Nailah Uddin, Research Manager
Thinkbox

The industry's biggest media effectiveness databank, now at your fingertips with added functionality



Profit Ability 2:

The ultimate media effectiveness databank



* Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

** Based on end date of analysis period. Spend by year: 21% 2021, 32% 2022, 47% 2023. All analysis based on most recent 52 weeks available.

*** Total databank has 14 categories, only 7 have sufficient granularity to report individually

Profit Ability 2:

Key takeaways

A concrete business case for advertising

Performance varies greatly channel-to-channel

Performance varies greatly sector-to-sector

No seismic shift in advertising effectiveness post-Covid

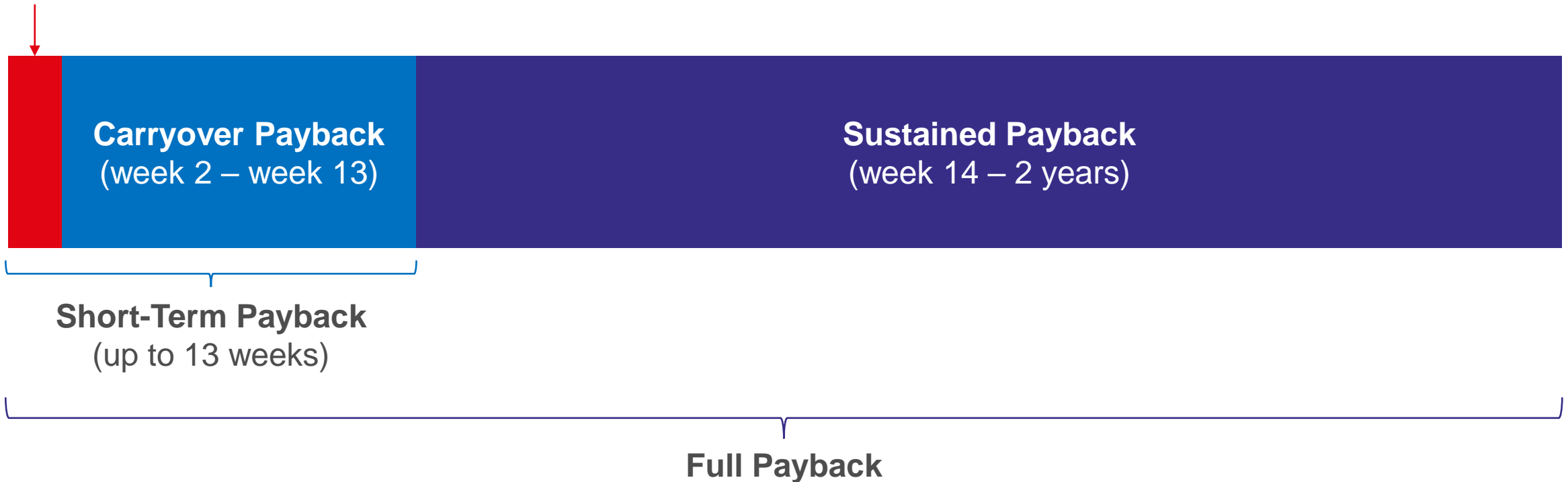
Look beyond just 'digital' for rapid payback

Short-termism short changes brands

A moment on definitions!

Immediate Payback

In the same week as advertising

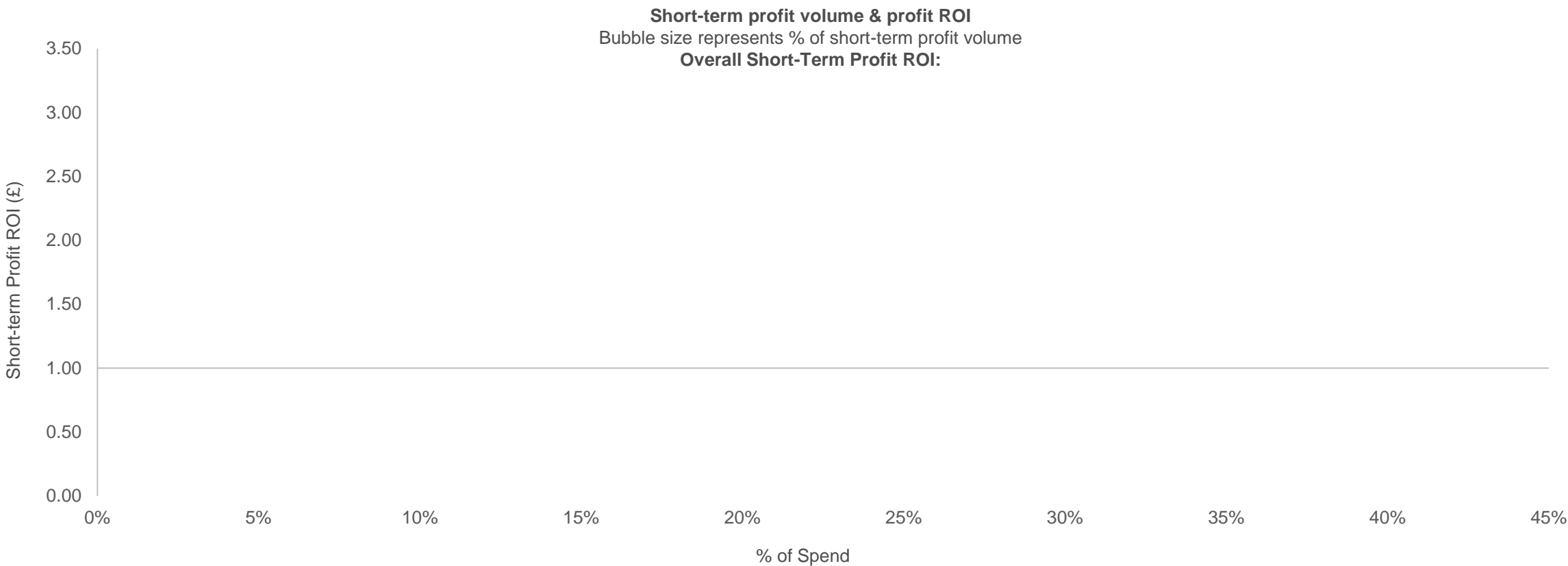


Good news... advertising works



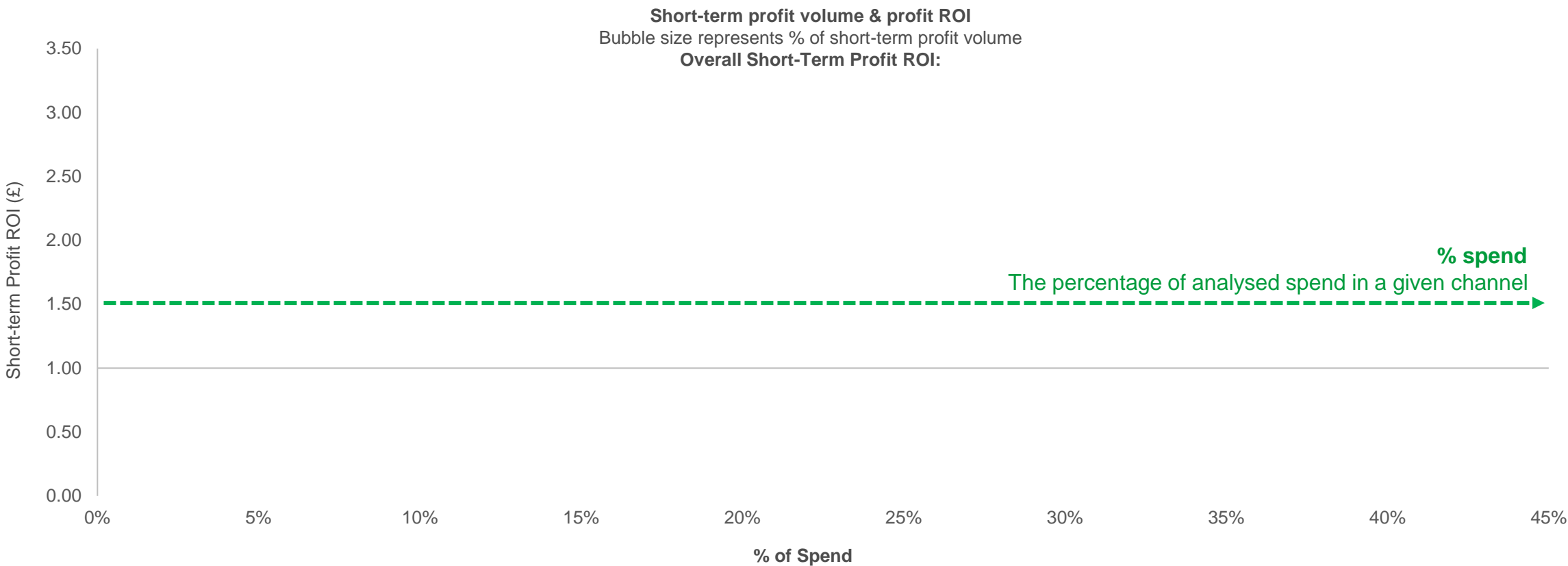
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Travel based on all sector multiplier of 2.2

How to read the bubble charts in this section



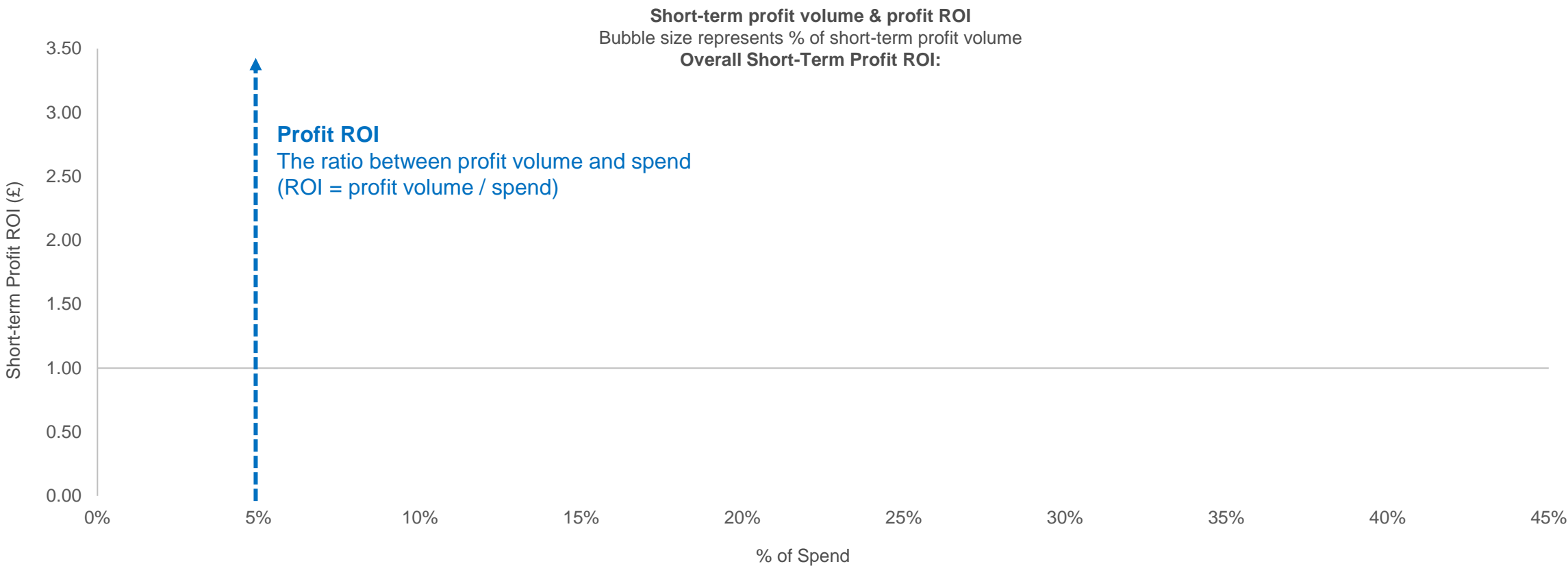
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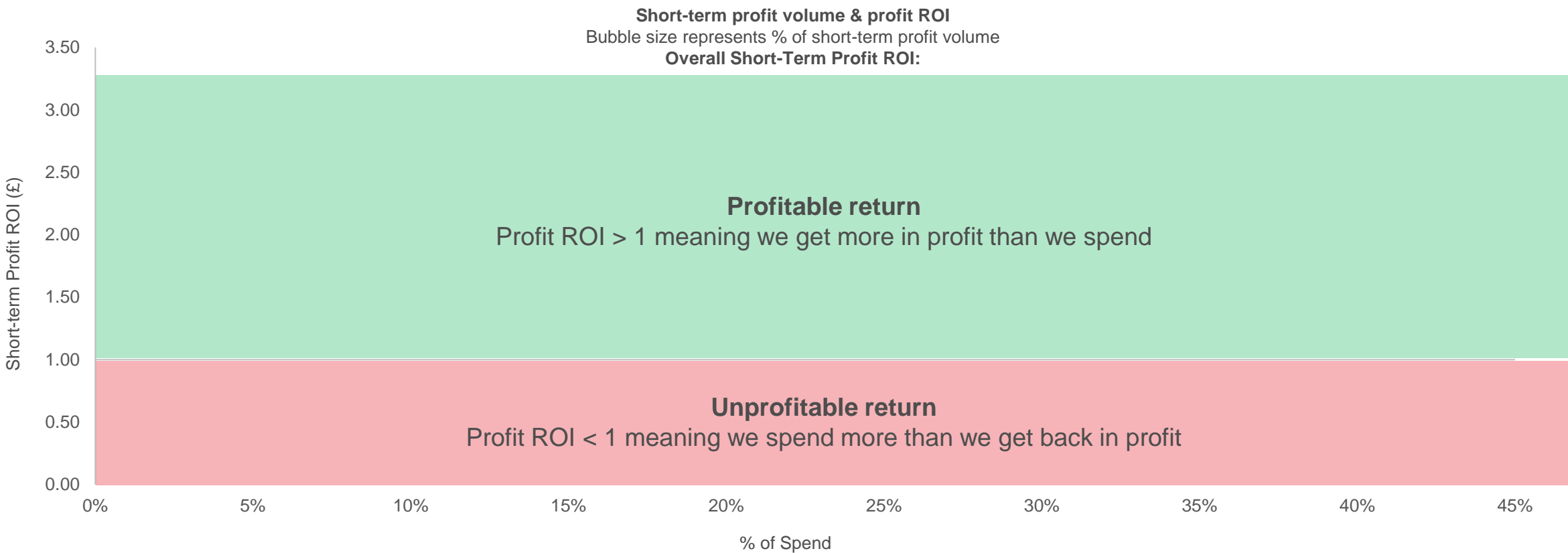
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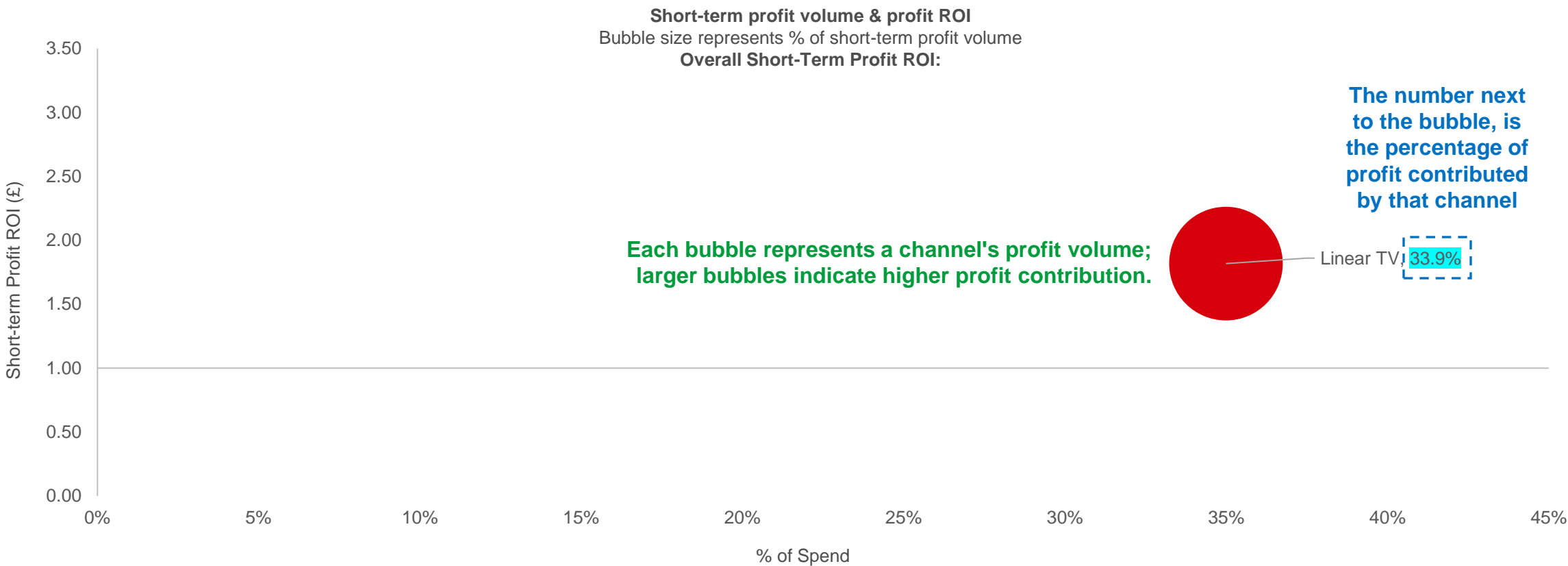
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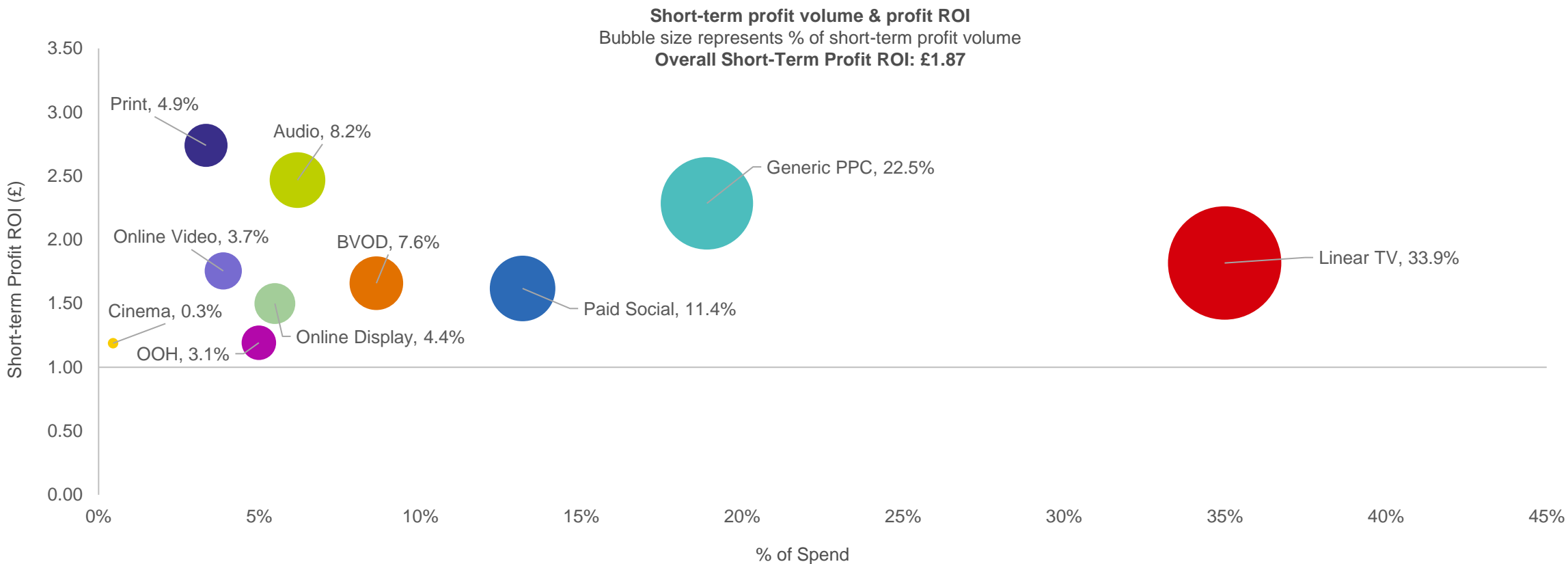
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK
To note: as a rule creative production costs and some non-COGs variable costs may be not included in the reported ROIs, so true break-even would be slightly higher than 1

How to read the bubble charts in this section



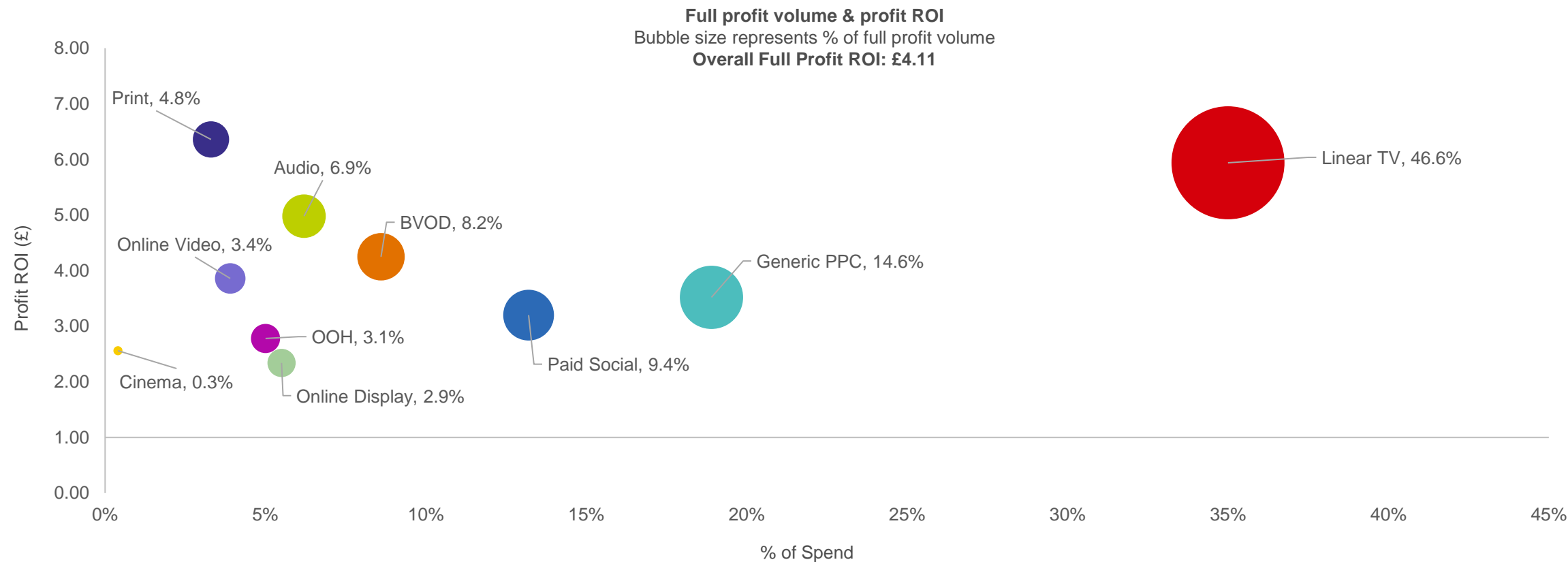
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Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

All channels deliver a return: short-term Profit ROI = £1.87



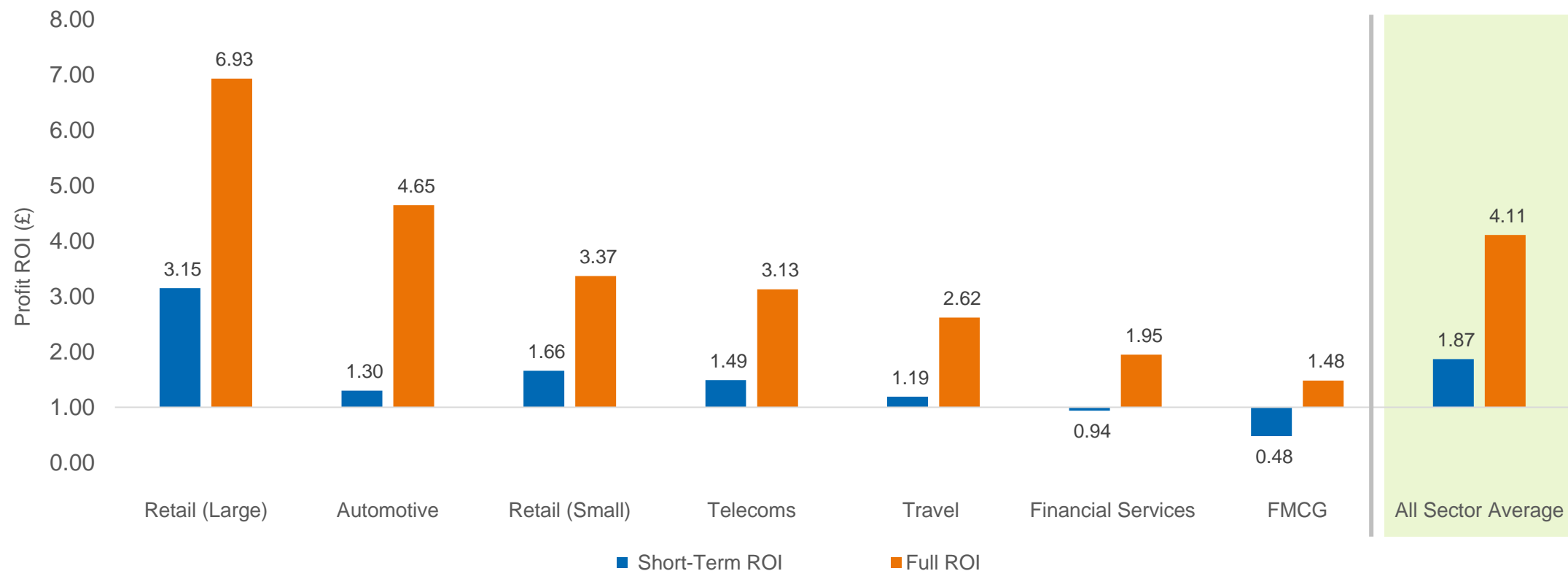
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

Looking at the full effect, average Profit ROI increases to £4.11



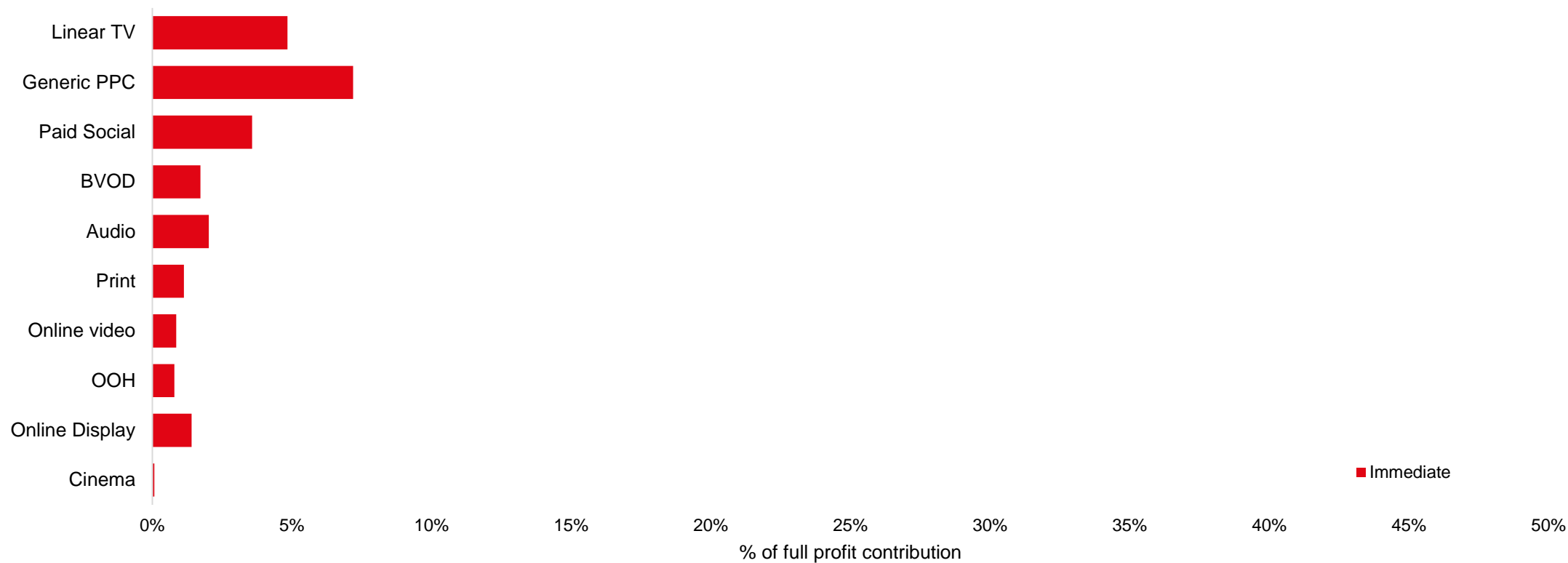
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

Advertising profitability levels vary greatly sector to sector



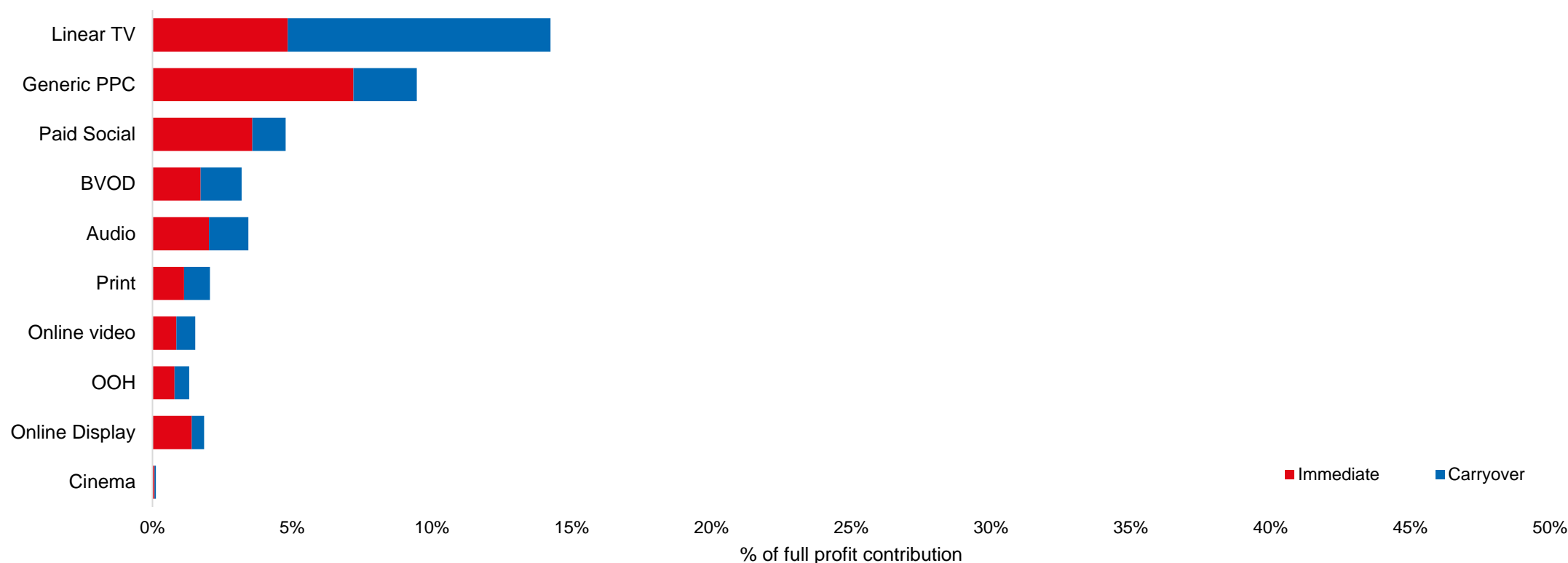
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Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Travel based on all sector multiplier of 2.2

Immediate payback not exclusive to ‘performance’ media



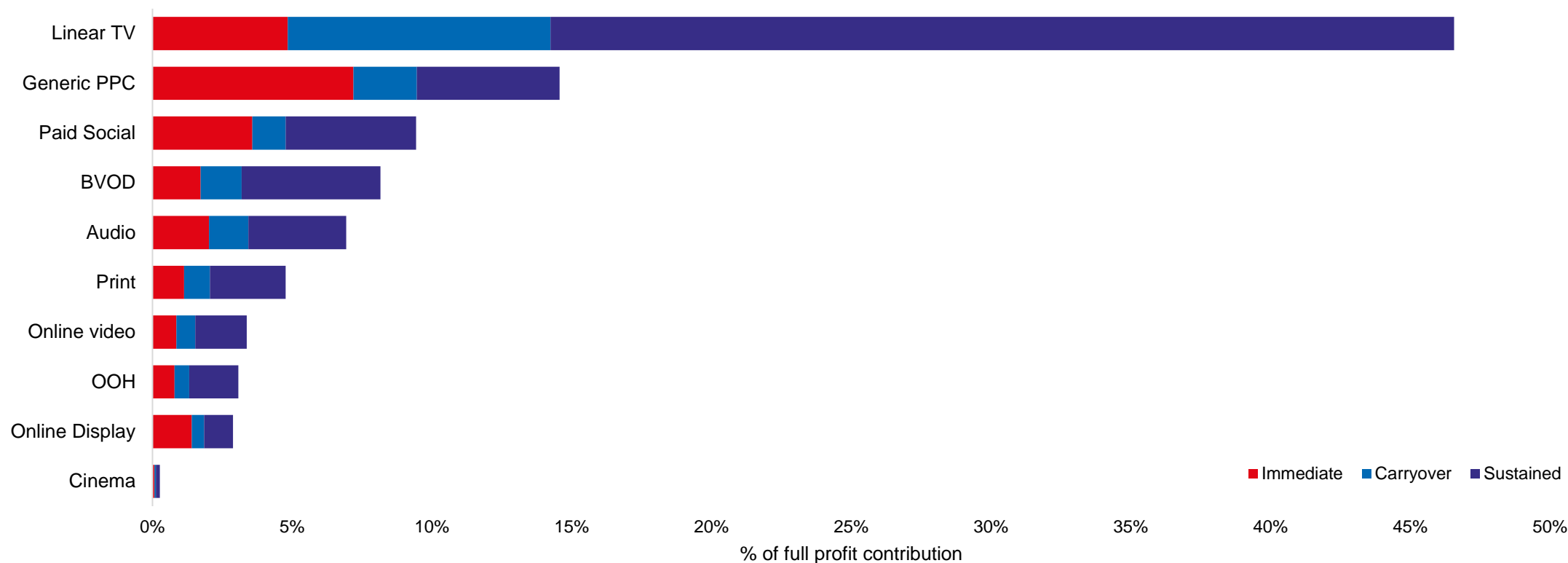
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A different picture emerges when looking at the short-term



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. Immediate contribution = same week as advertising, Carryover = within 13 weeks, Sustained = within 2 years

Linear TV: unmatched as the total Profit ROI volume driver

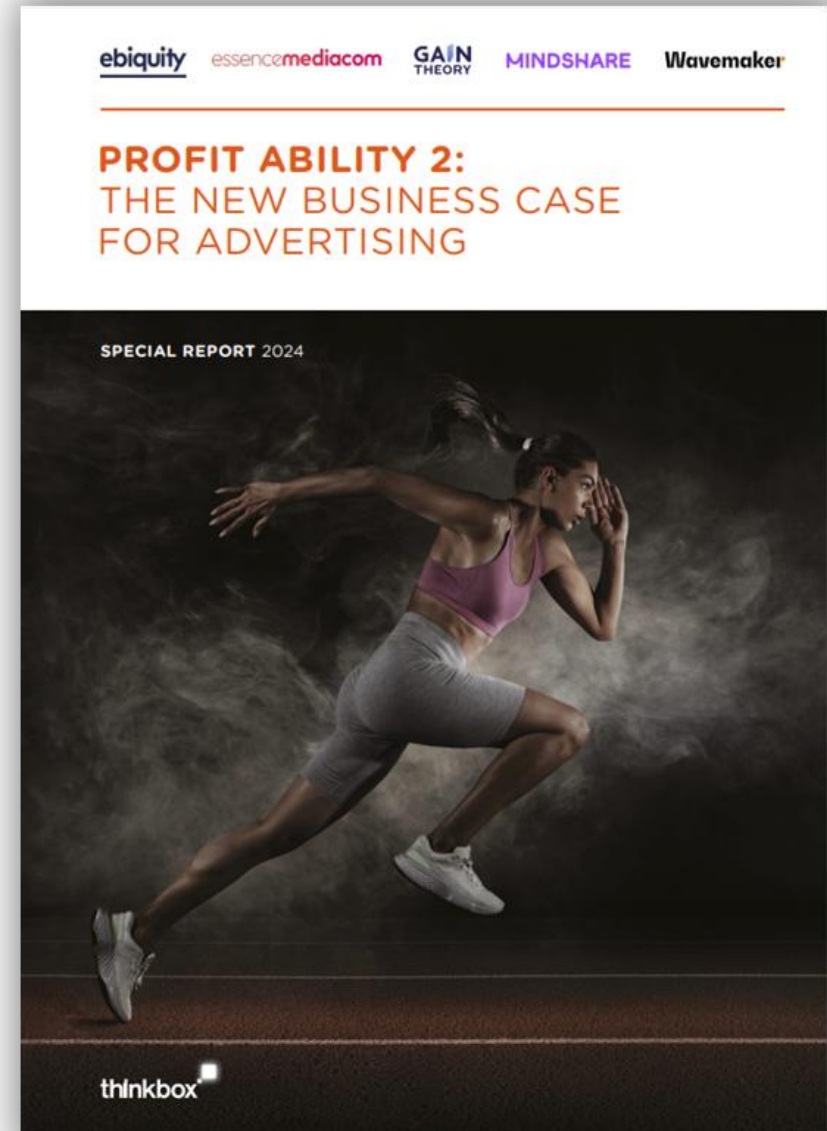


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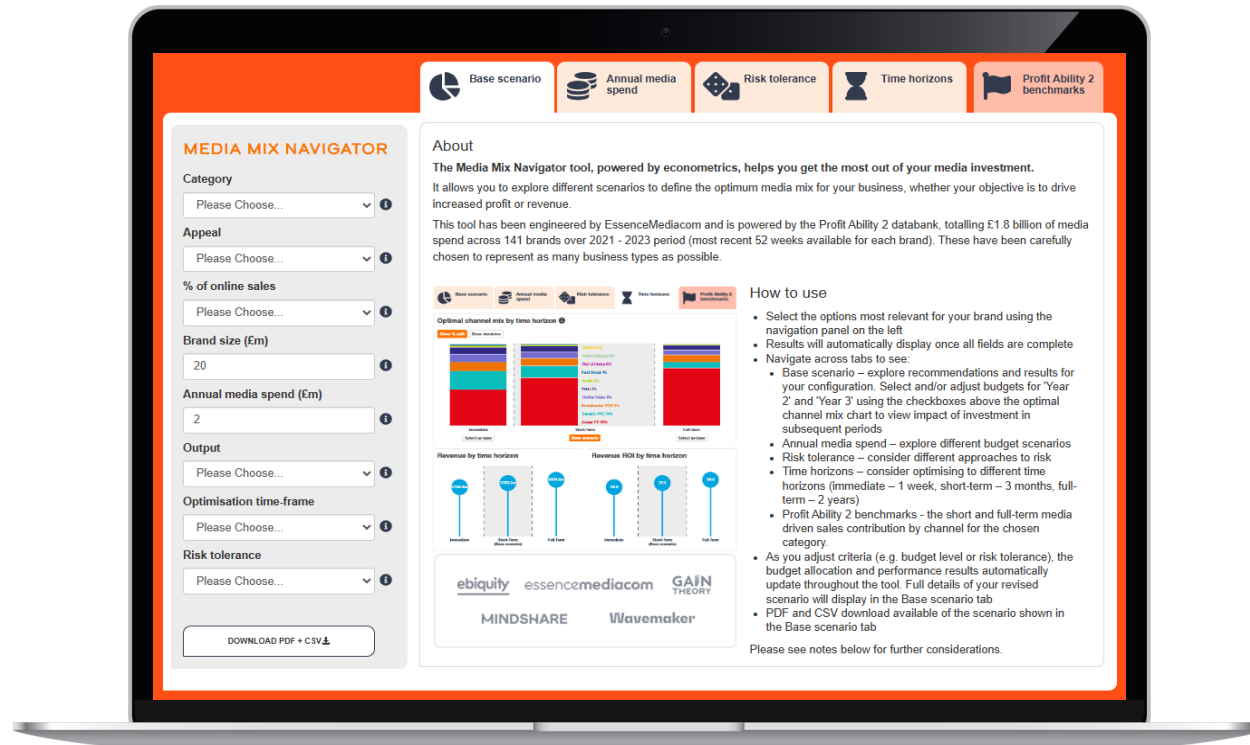
If you want the (very) extended version...



<https://www.thinkbox.tv/profitability2>



All of the data is available for you to run your own scenarios – in the Media Mix Navigator

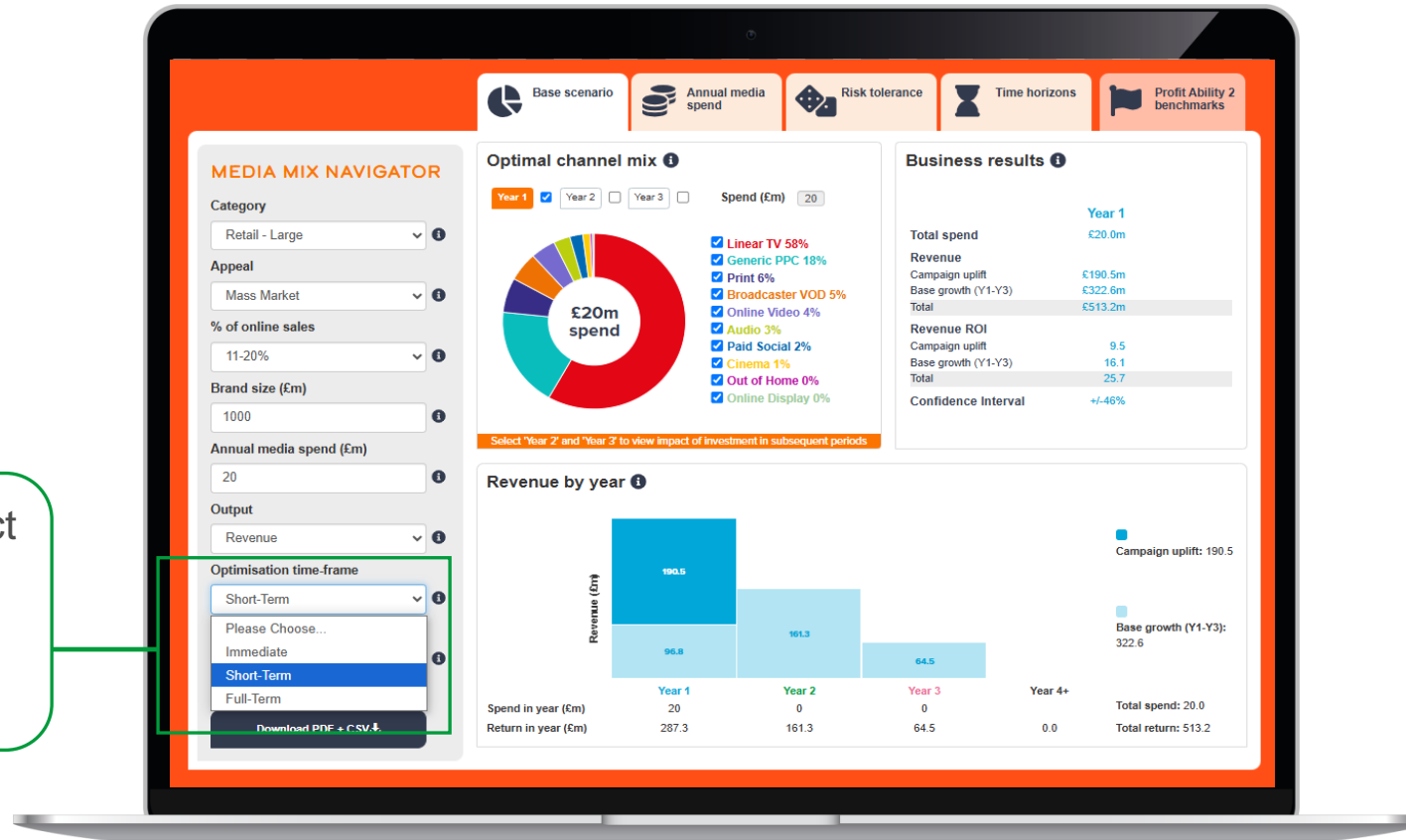


What's the optimal media mix for your brand and what might that mix deliver?

Calibrate the scenario to your brand



What's the optimal media mix for your brand and what might that mix deliver?



New!

You can now select what time horizon to optimise over (previously limited to short term)

The MMN then outputs the optimal media mix and the estimated outcomes

Your optimal media mix. You can deselect channels if required.

New!

You can now see the optimal mix by year

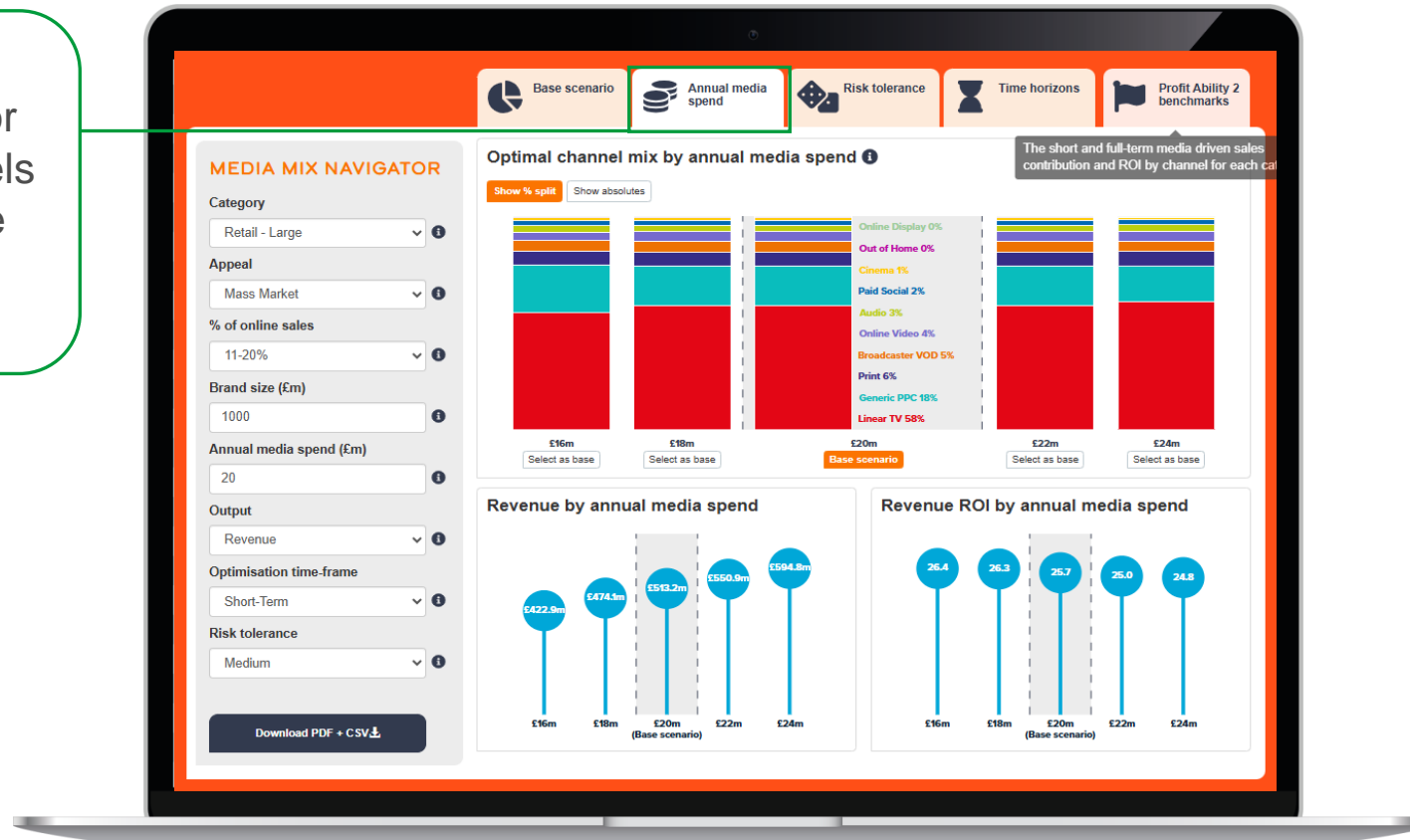
The estimated return and ROI

Adjust the spend for multiple years



Quickly see the optimal media mix and resulting return from other spend levels

View the optimisations for other spend levels around the one you originally selected

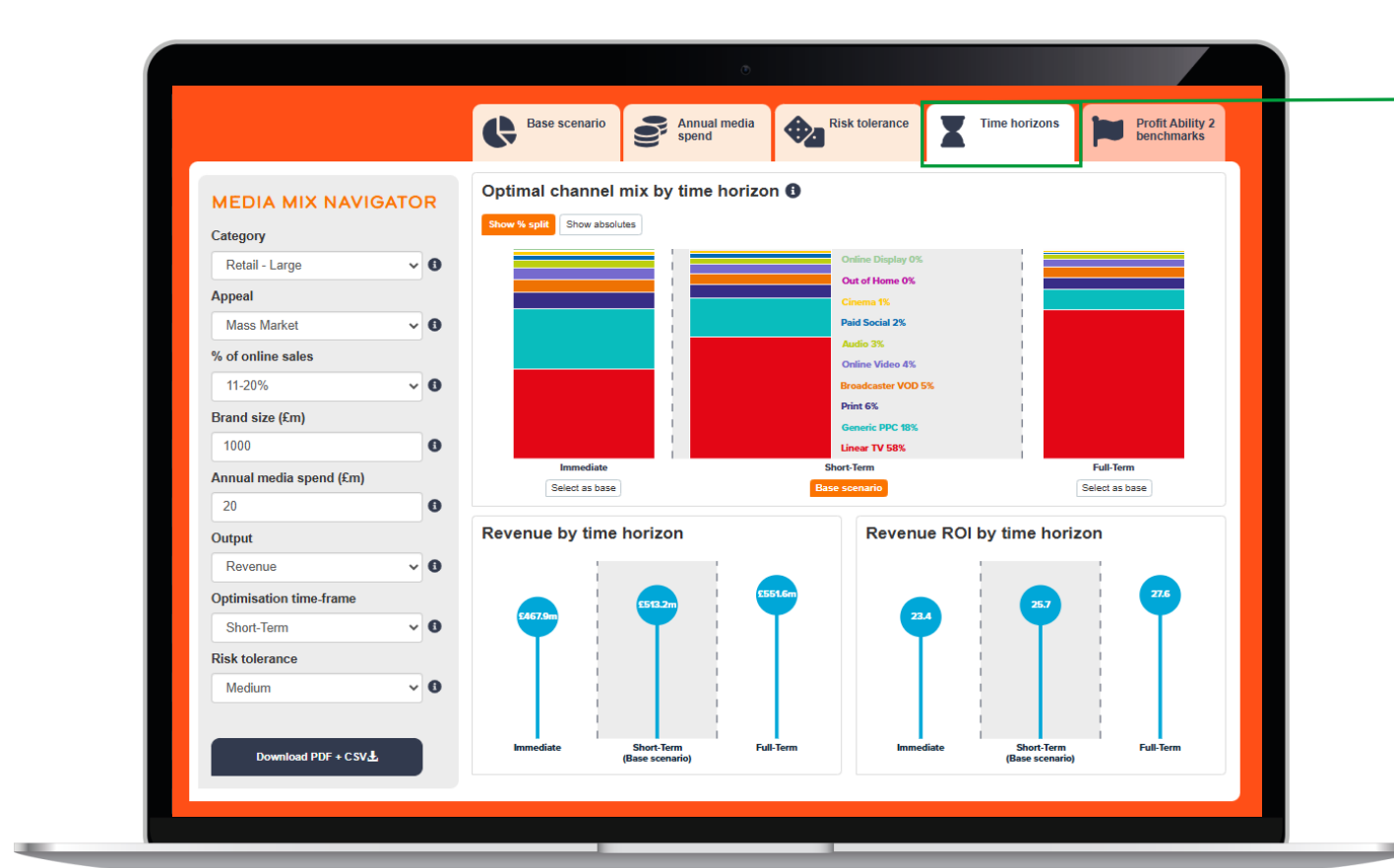


Understand how your optimal budget allocation changes depending on your appetite to risk



Compare your original scenario against the other levels of risk

How does the optimal media mix and return differ depending on when you want the return?



New!

Compare how the optimal mix and return changes when we optimise to different time horizons

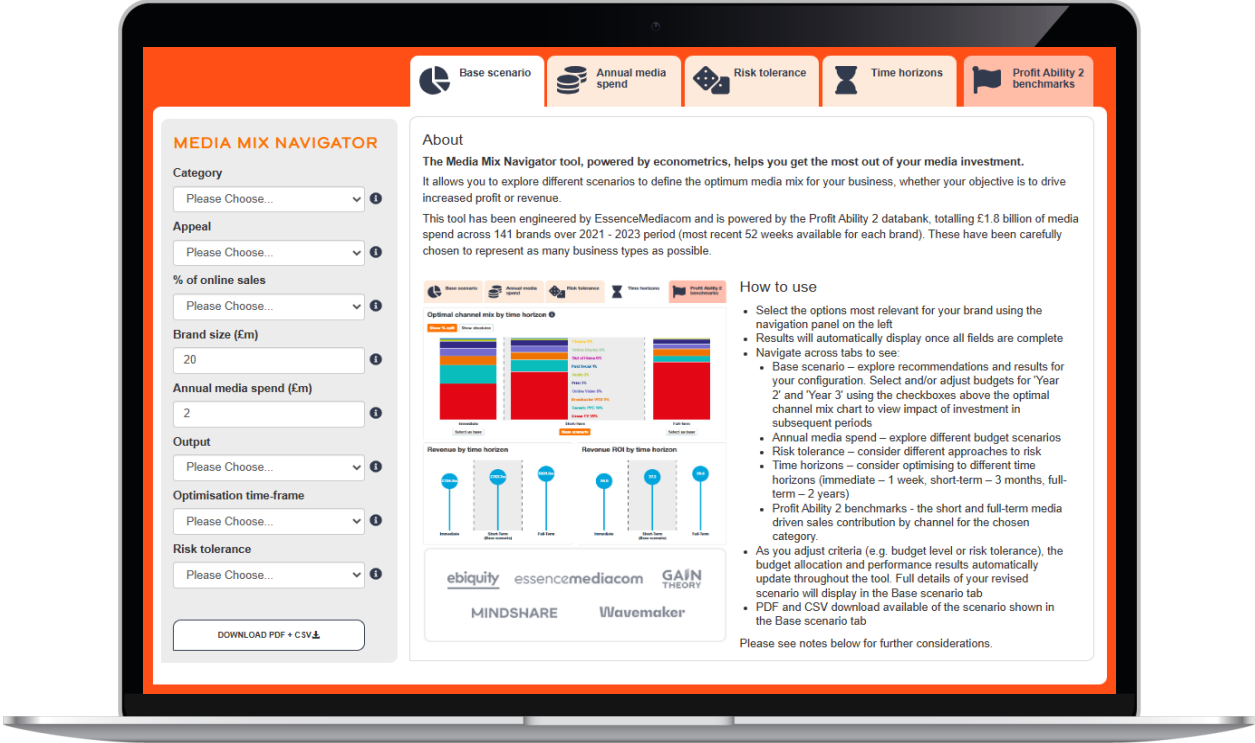
Want to go straight to the ROI benchmarks? No problem!



New!

Go straight to the PA2 benchmarks

Media Mix Navigator



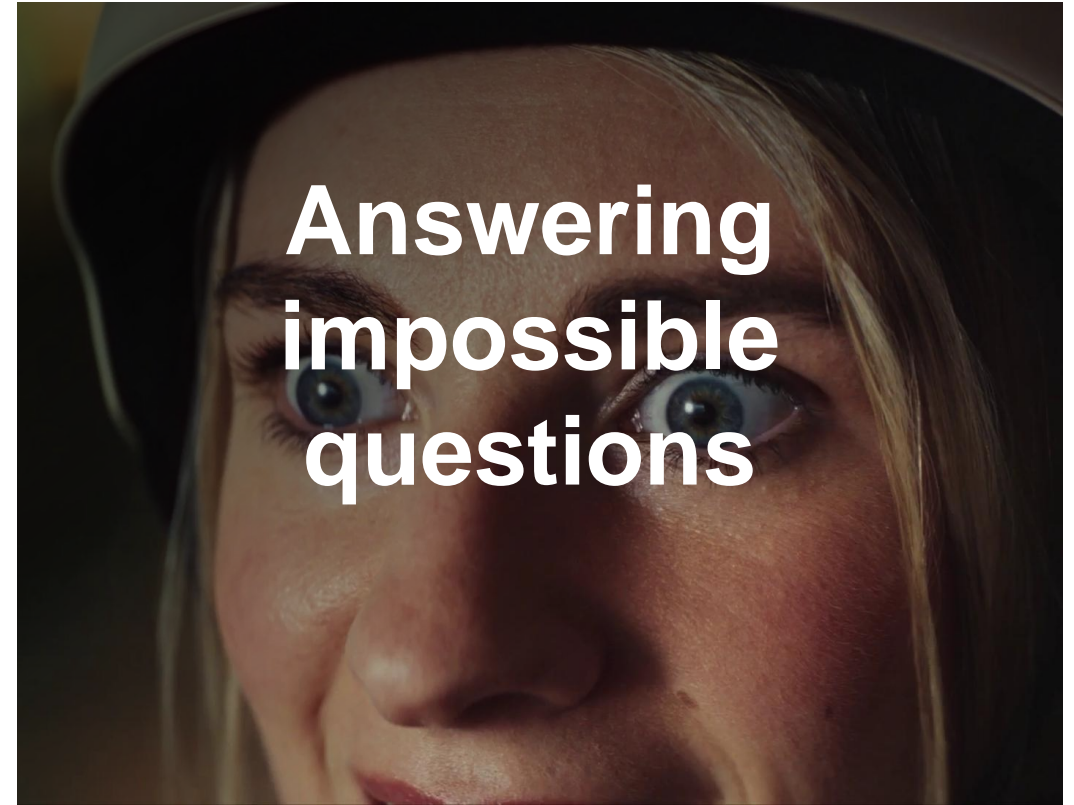
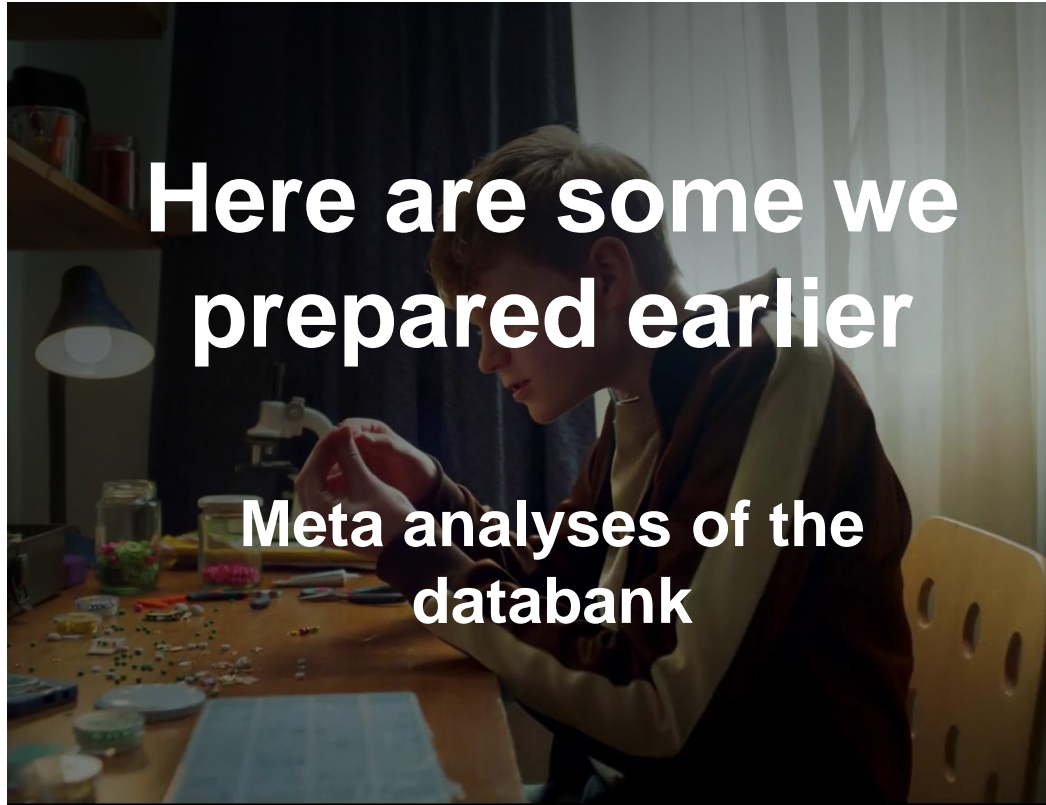
Media Mix Navigator in action

A hand holding a crystal ball that reflects the colorful bokeh background. The background is filled with out-of-focus light spots in warm yellow and orange tones, with some cooler blue and purple spots. The crystal ball itself shows a distorted, multi-colored reflection of these light spots.

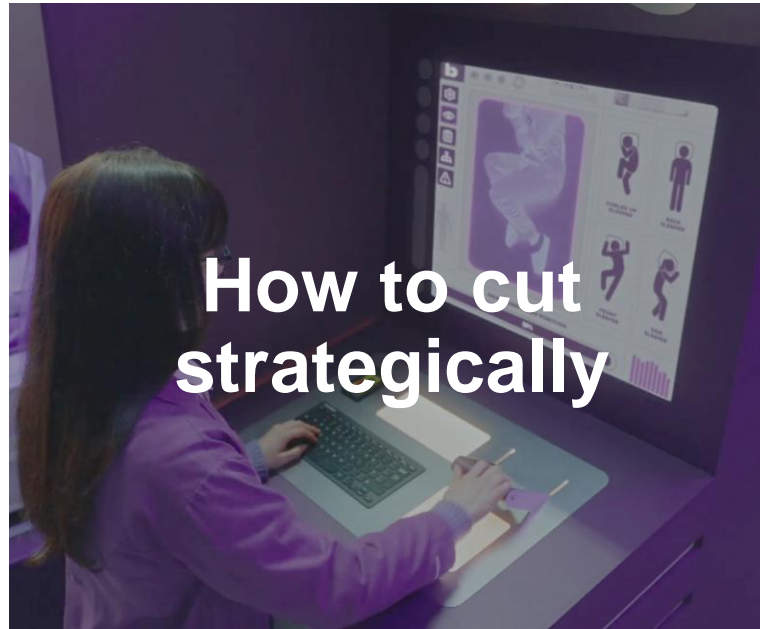
Jane Christian, EVP Analytics
Choreograph UK

Elliott Millard, Chief Strategy Officer
Thinkbox

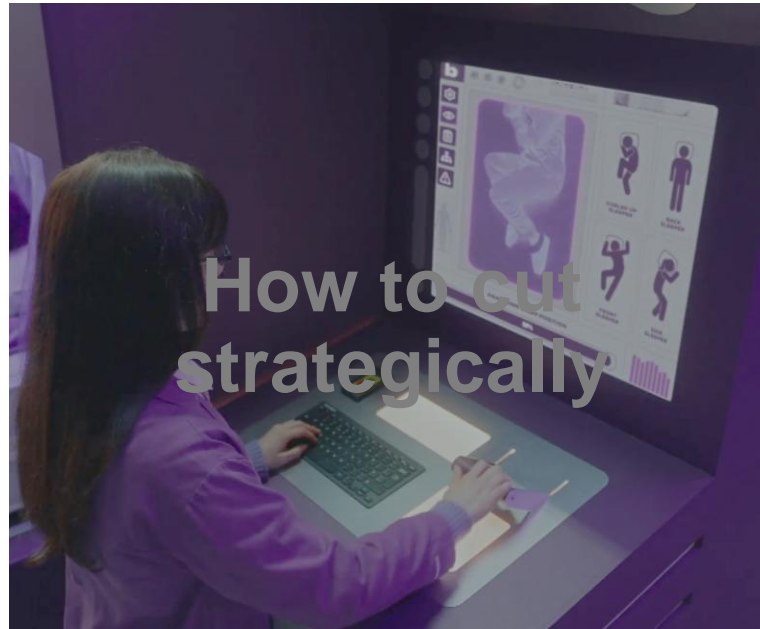
The Media Mix Navigator is designed to be helpful



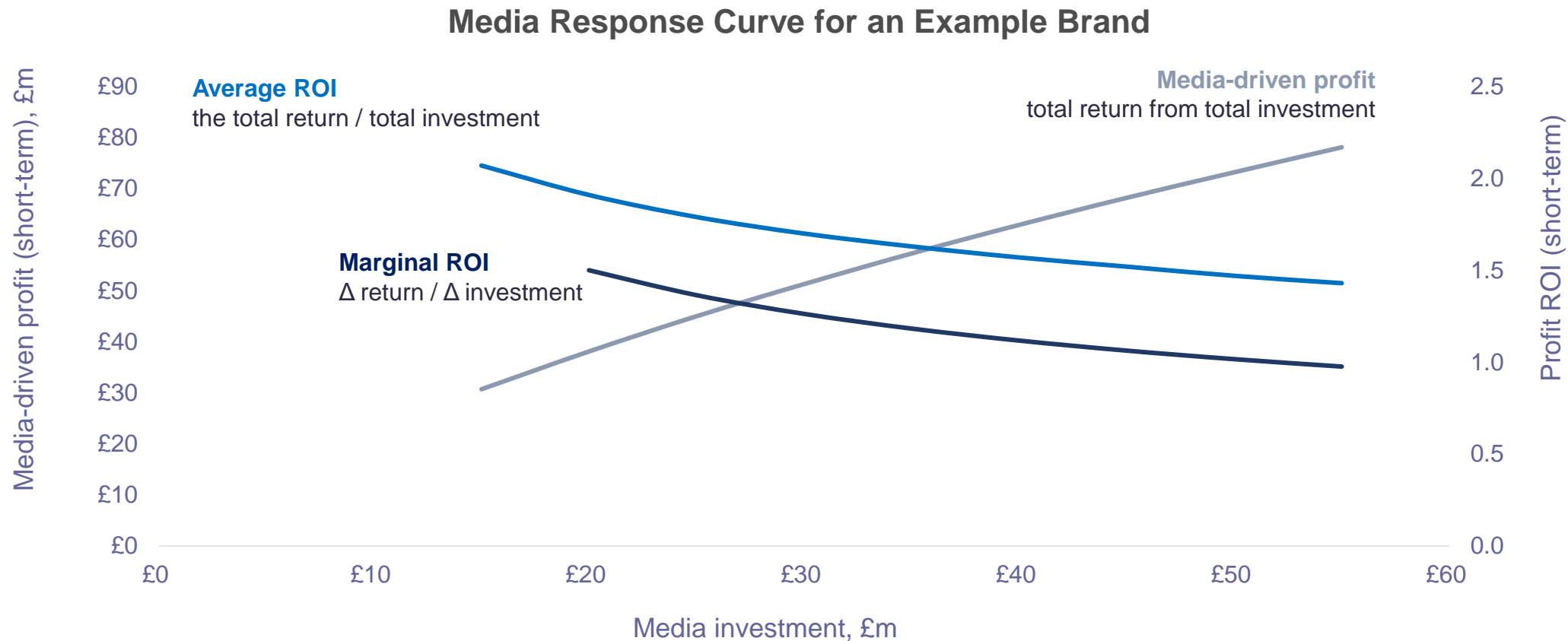
Three meta-analyses from the Media Mix Navigator



Three meta-analyses from the Media Mix Navigator



We know that as we spend more, profit will increase, but at a decreasing rate



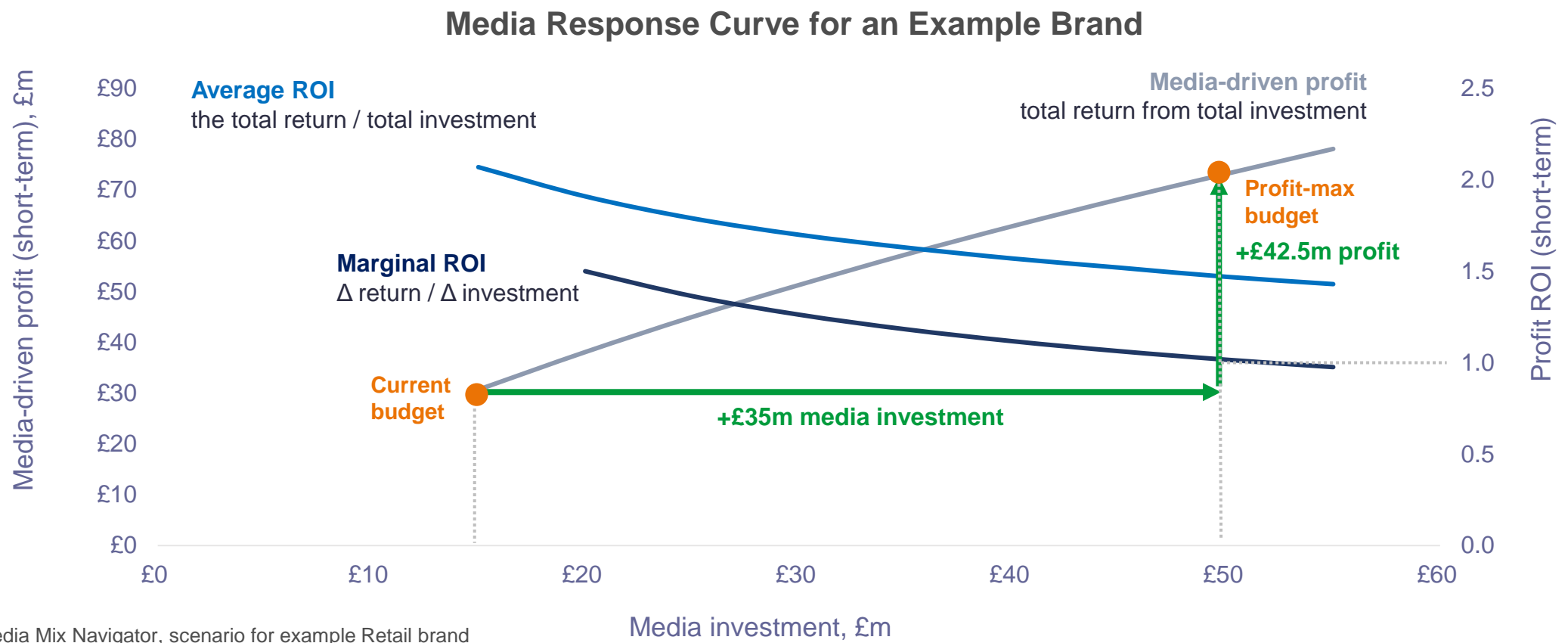
Using the MMN we can simulate what returns a brand can expect as budget increases – Retail Brand example

Scenario #	Advertising budget, £m	Incremental short-term profit, £m	Average short-term profit ROI	Extra incremental short-term profit, £m	Marginal short-term profit ROI
1	15	30.7	2.0		
2	20	38.1	1.9	7.40	1.48
3	25	45.0	1.8	6.90	1.38
4	30	51.3	1.7	6.30	1.26
5	35	57.3	1.6	6.00	1.20
6	40	62.9	1.6	5.60	1.12
7	45	68.2	1.5	5.30	1.06
8	50	73.2	1.5	5.00	1.00
9	55	78.1	1.4	4.90	0.98

Breakeven

Source: Media Mix Navigator, Retail brand, mass market, 31-40% online sales, £1bn brand size, medium risk, 20% profit margin, various spend levels

In this example, the brand could increase its budget by £35m, generating £42.5 million incremental profit at a short-term ROI of 1.2



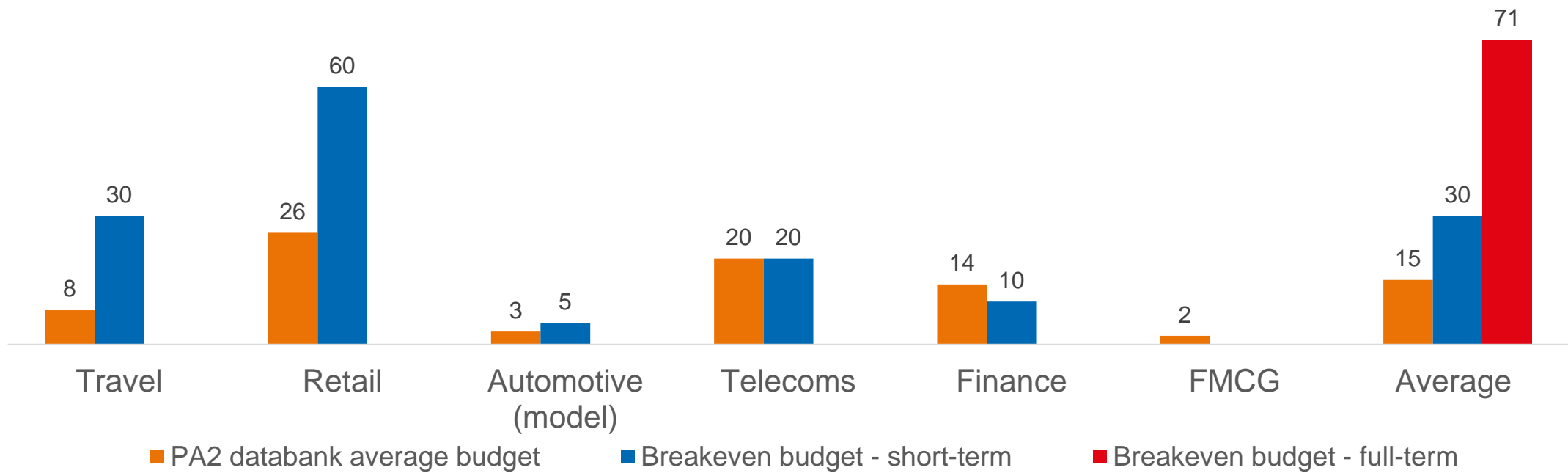
Source: Media Mix Navigator, scenario for example Retail brand

But does this hold true across all sectors? We tested it with 52,416 MMN scenarios!

- **7 Sectors:** All categories, Autos, FMCG, Finance, Retail, Telecoms, Travel
- **Appeal:** Mass-Market, Niche
- **4 Online sales brackets:** 0-10%, 31-40%, 61-70%, 91-100%
- **Brand sizes:** *specific for each sector*
- **4 risk profiles:** Very Low, Low, Medium, High
- **12 Spend levels (£Millions):** 1, 5, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100
- **Profit margin:** 20%

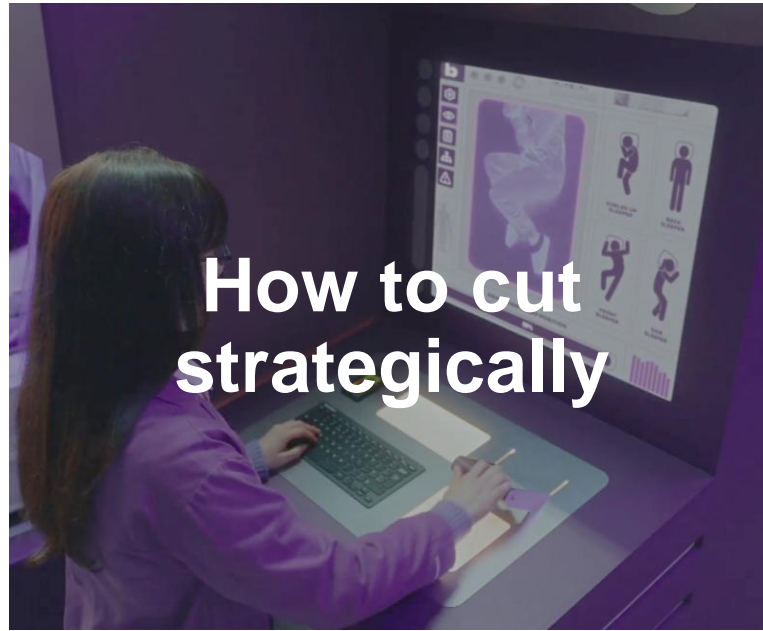
On average, brands can double their media spend while still generating profitable returns, even just including ST effects

Profitable headroom to increase average annual media £m



Source: Media Mix Navigator

Three meta-analyses from the Media Mix Navigator

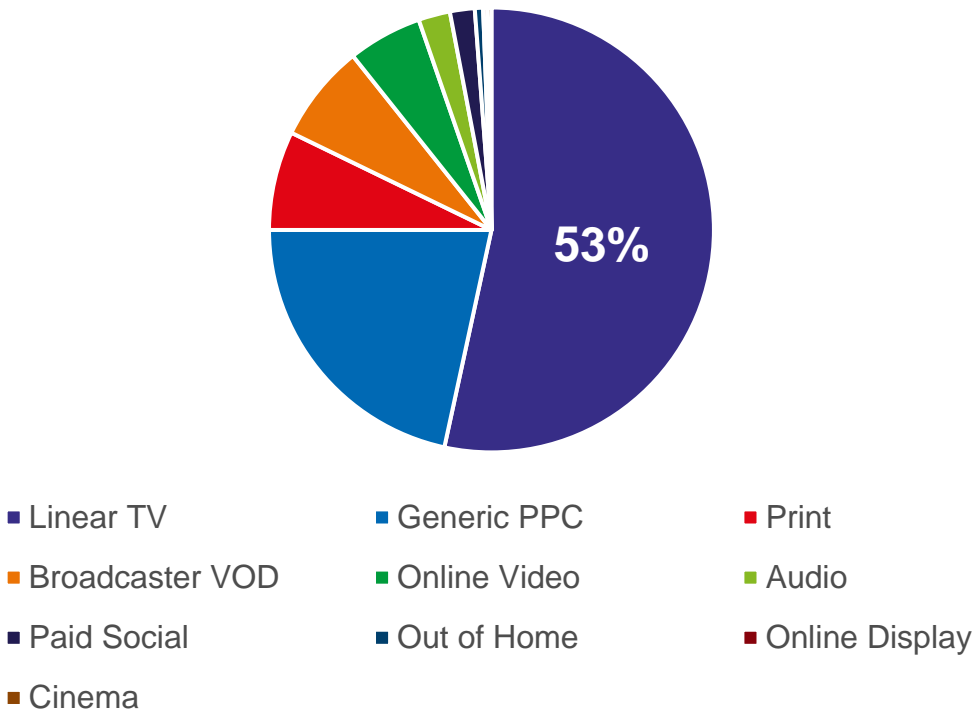


Let's take an example run in the Media Mix Navigator – our 'base scenario'

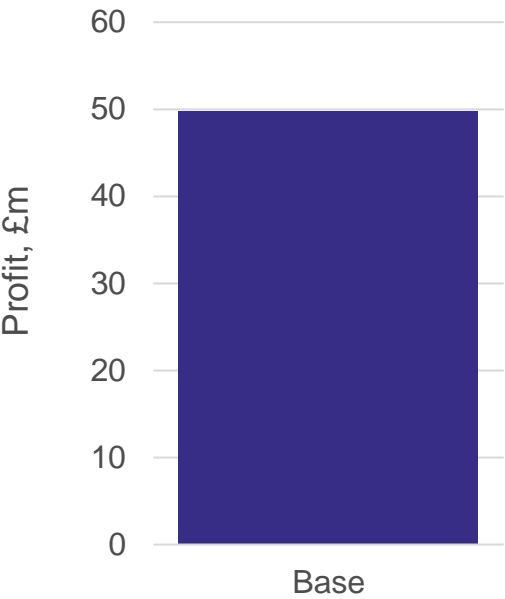
Base Scenario Assumptions

- Retail
- £10m original budget
- Mass-Market appeal
- Medium risk profile
- £22,500m Brand size
- 30% profit margin
- 31-40% Online sales

Optimal Media Split

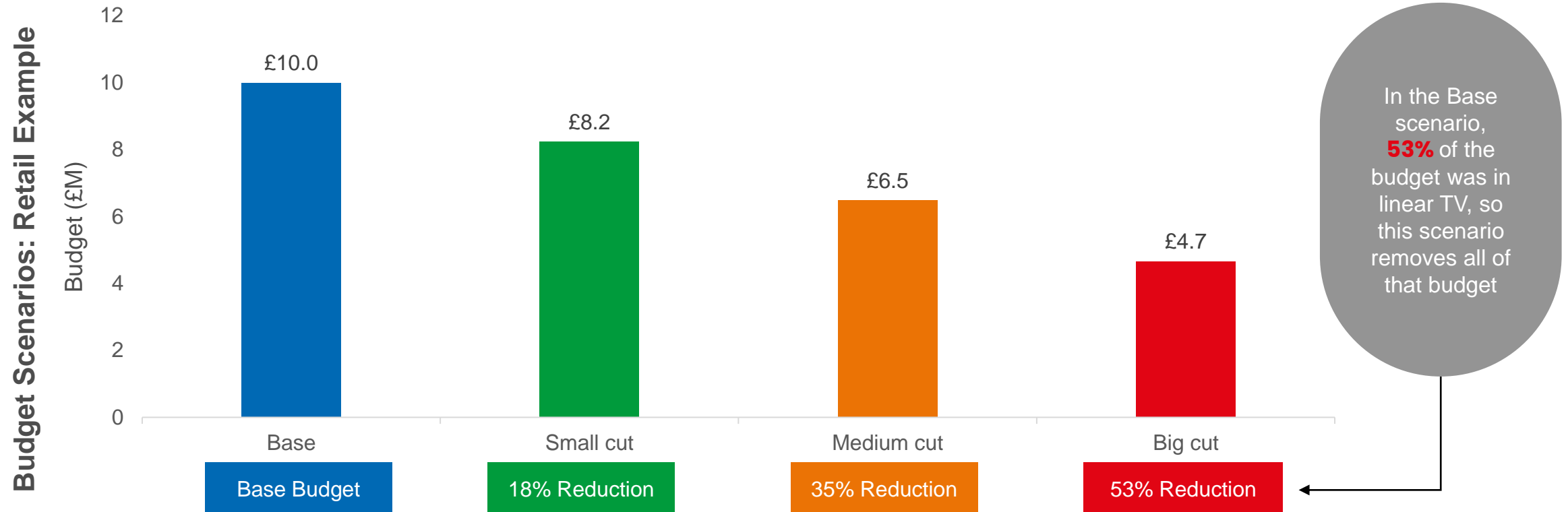


Projected Profit



Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, Retail brand, Mass Market, £22,500m Brand size, 31-40% sales online, medium risk, £10m budget

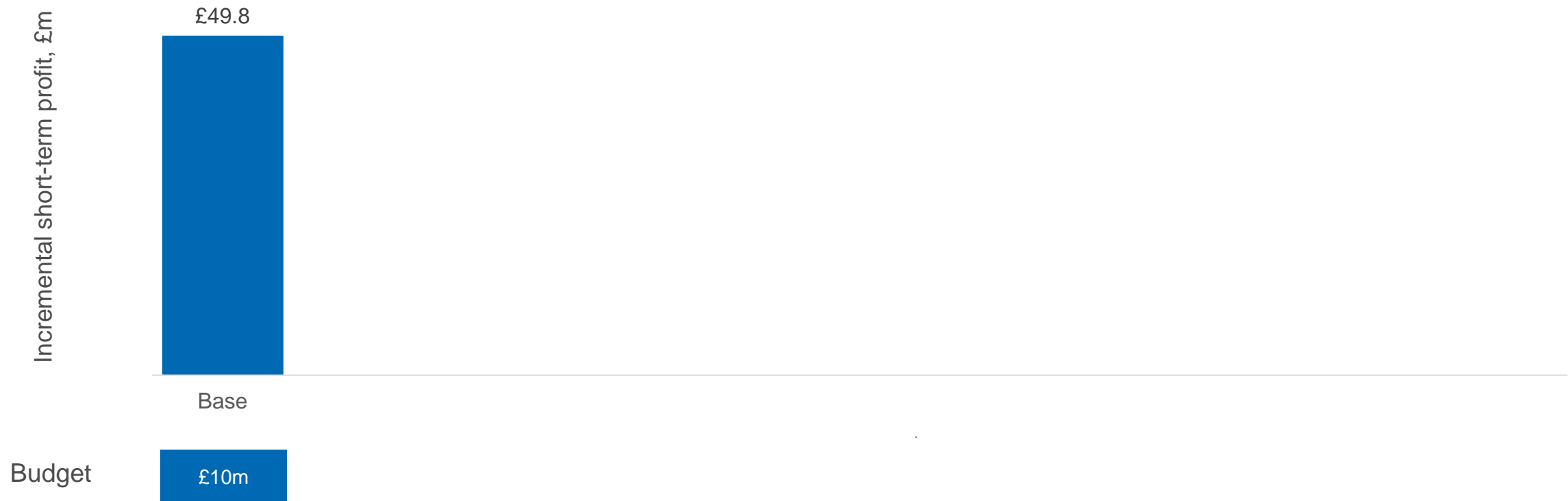
Three budget scenarios to simulate the impact of reducing budgets optimally vs removing it all from TV



Source: Why the Eff would you cut TV? GroupM, 2025

Let's begin with the base scenario we just went through

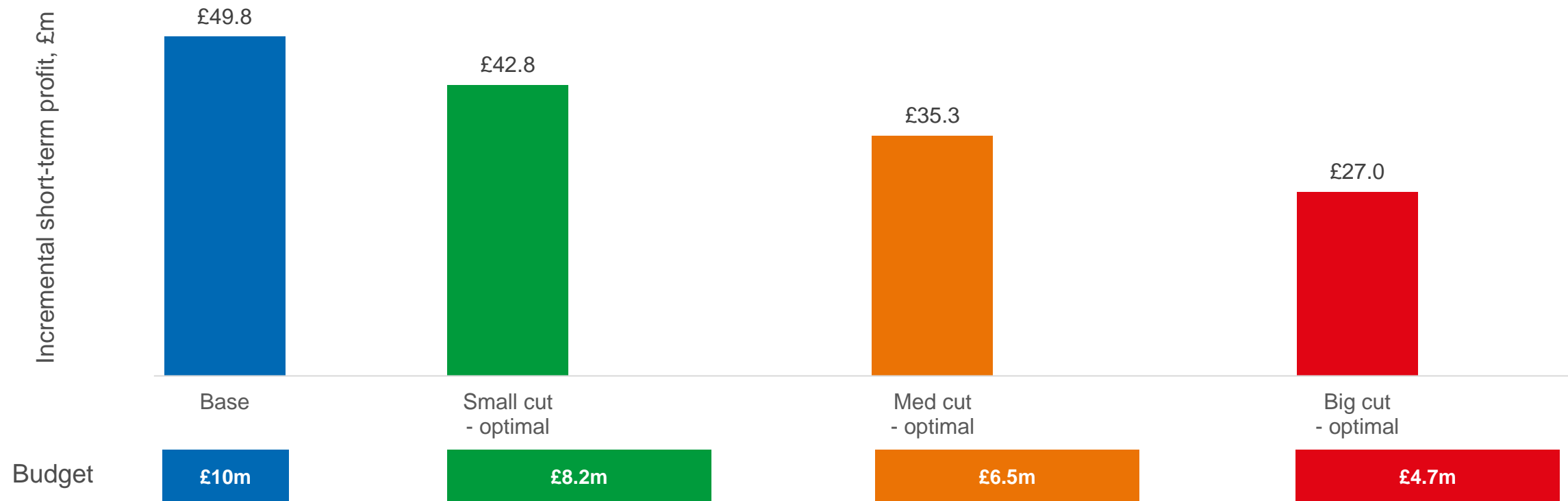
Retail brand example: Short-term profit implication by budget scenario



Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, Retail brand, Mass Market, £22,500m Brand size, 31-40% sales online, medium risk, various budgets

When budgets are reduced optimally, media profit naturally drops

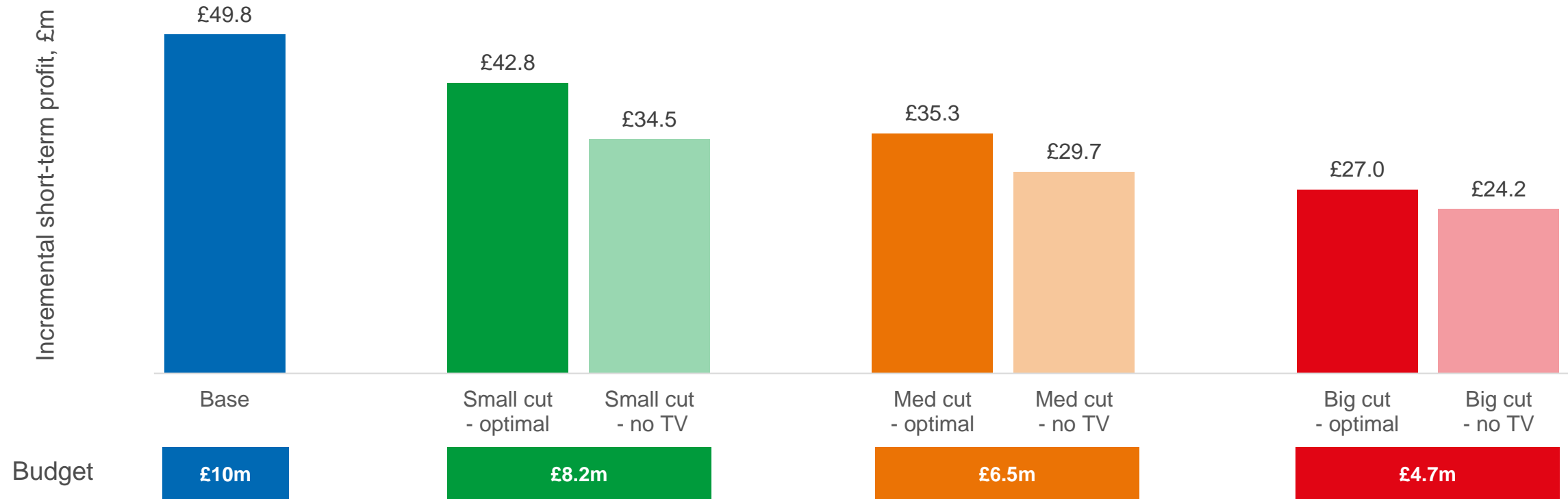
Retail brand example: Short-term profit implication by budget scenario



Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, Retail brand, Mass Market, £22,500m Brand size, 31-40% sales online, medium risk, various budgets

But the drop in profit is higher when TV is removed completely instead of in concert with other channels

Retail brand example: Short-term profit implication by budget scenario



Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, Retail brand, Mass Market, £22,500m Brand size, 31-40% sales online, medium risk, various budgets

We ran over 52,416 scenarios in the MMN to extrapolate this

- **7 Sectors:** All categories, Autos, FMCG, Finance, Retail, Telecoms, Travel
- **Appeal:** Mass-Market, Niche
- **4 Online sales brackets:** 0-10%, 31-40%, 61-70%, 91-100%
- **3 Brand sizes:** *specific for each sector*
- **4 risk profiles:** Very Low, Low, Medium, High
- **12 Spend levels (£Millions):** 1, 5, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

When looking across all examples, we see the same picture as our Retail example

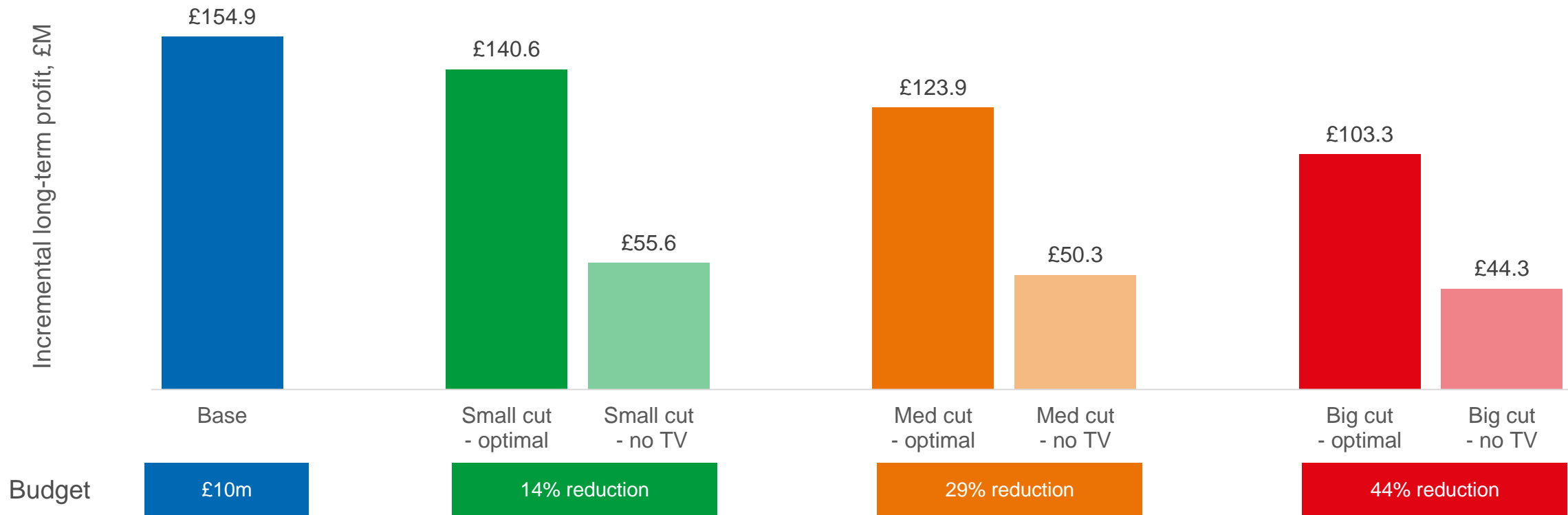
Average of all scenarios: **Short-term** profit implication by budget scenario



Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, average of budget scenarios

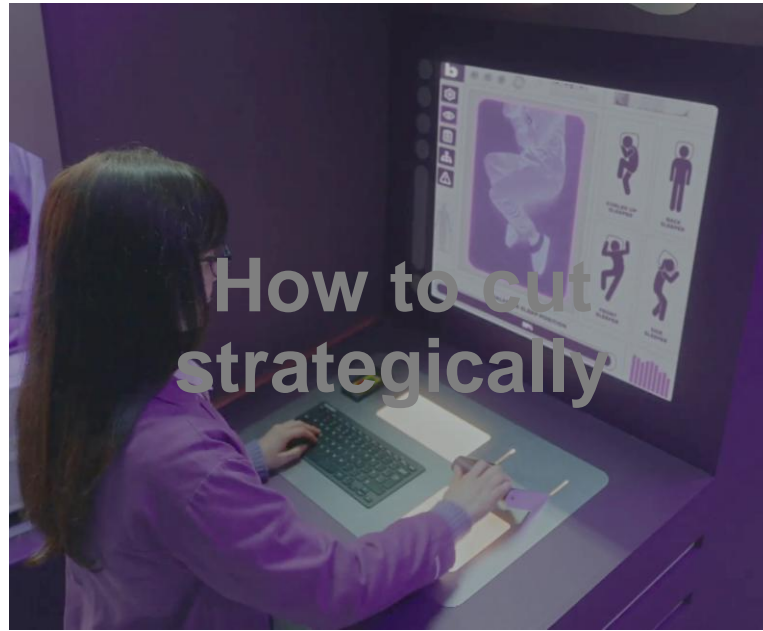
This difference is even more dramatic when we look at the long-term impact with profit dropping by almost two thirds

Average of all scenarios: **Long-term** profit implication by budget scenario

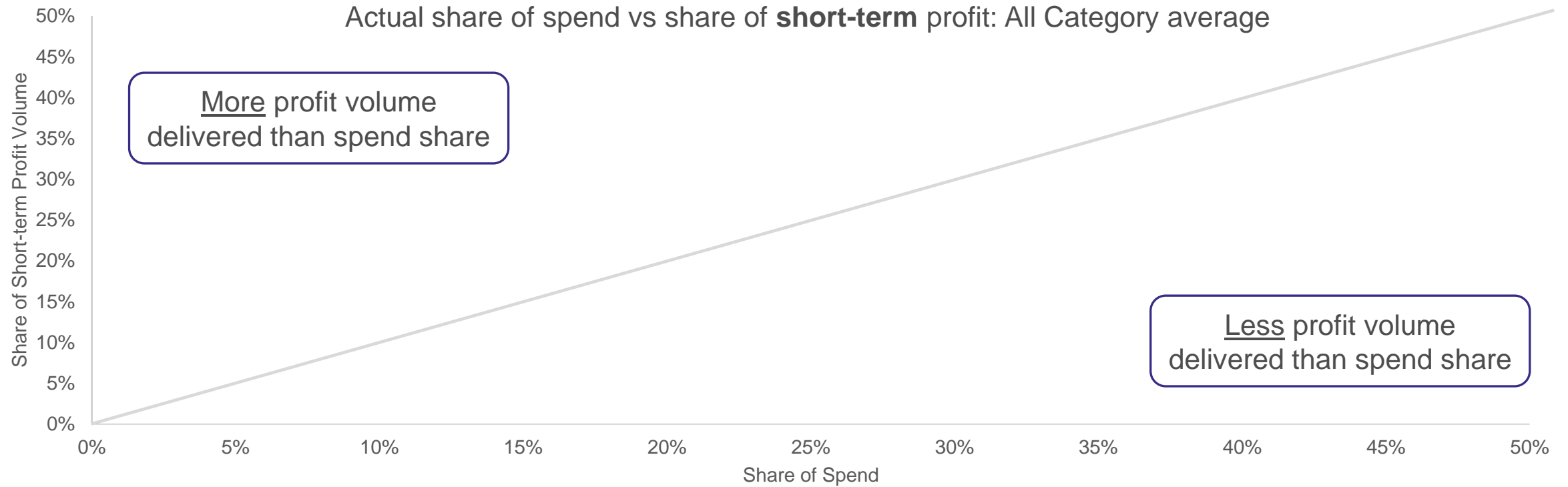


Source: Why the Eff would you cut TV? GroupM, 2025, Media Mix Navigator, average of budget scenarios

Three meta-analyses from the Media Mix Navigator

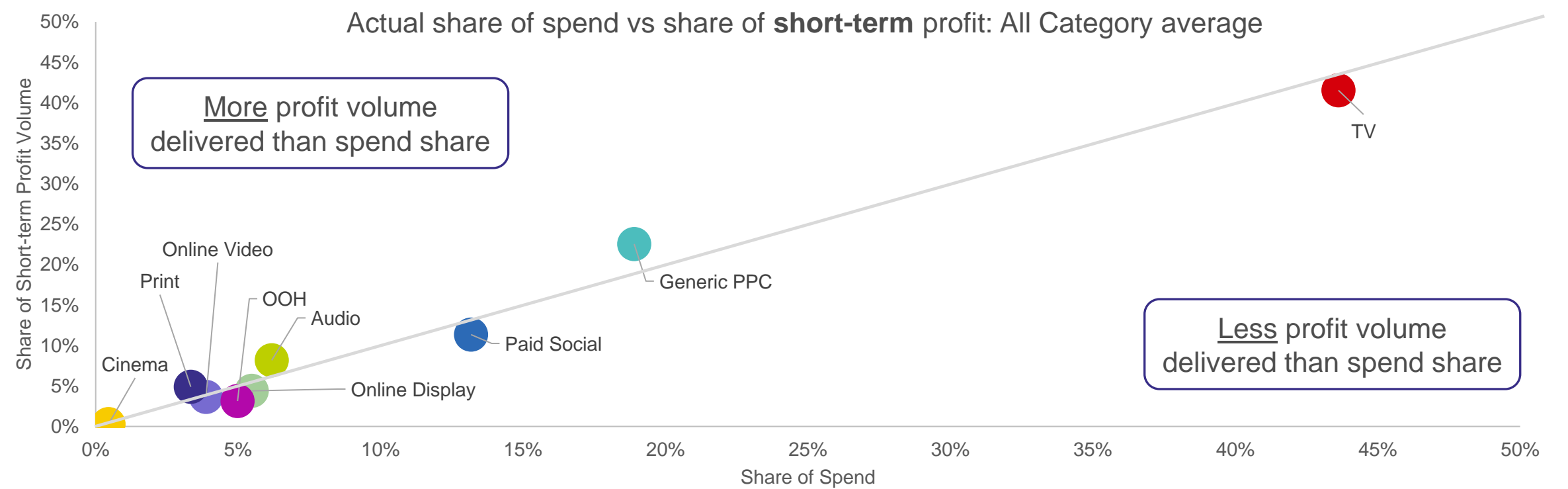


A quick explainer



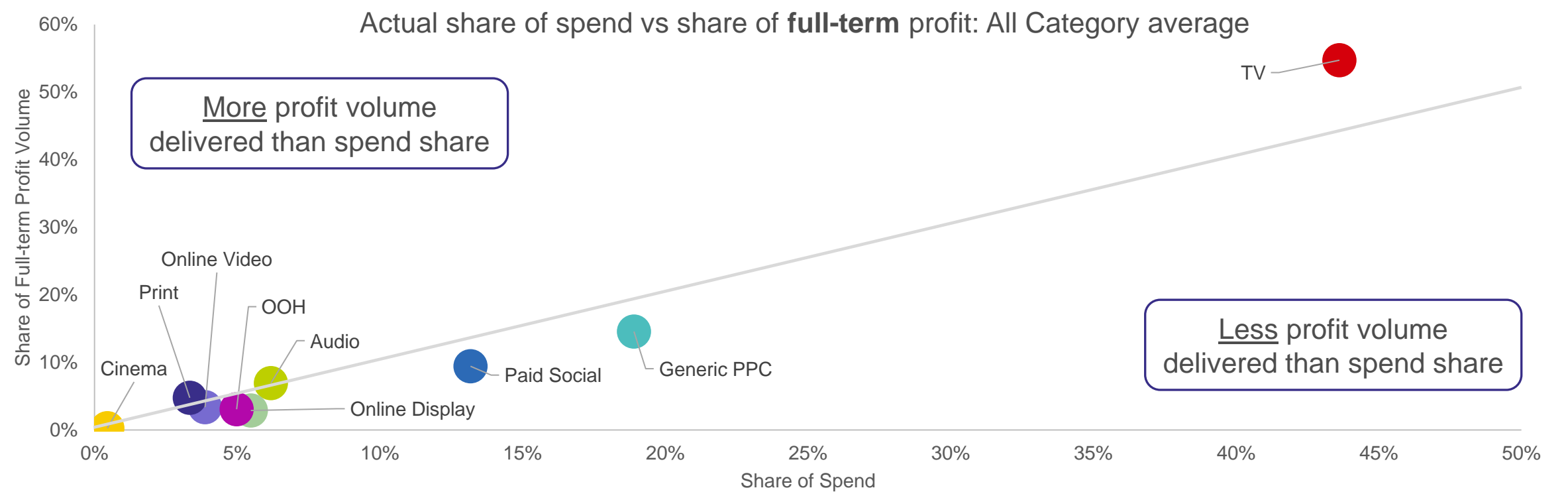
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.

In the short term, Generic PPC, Audio and Print punch above their weight



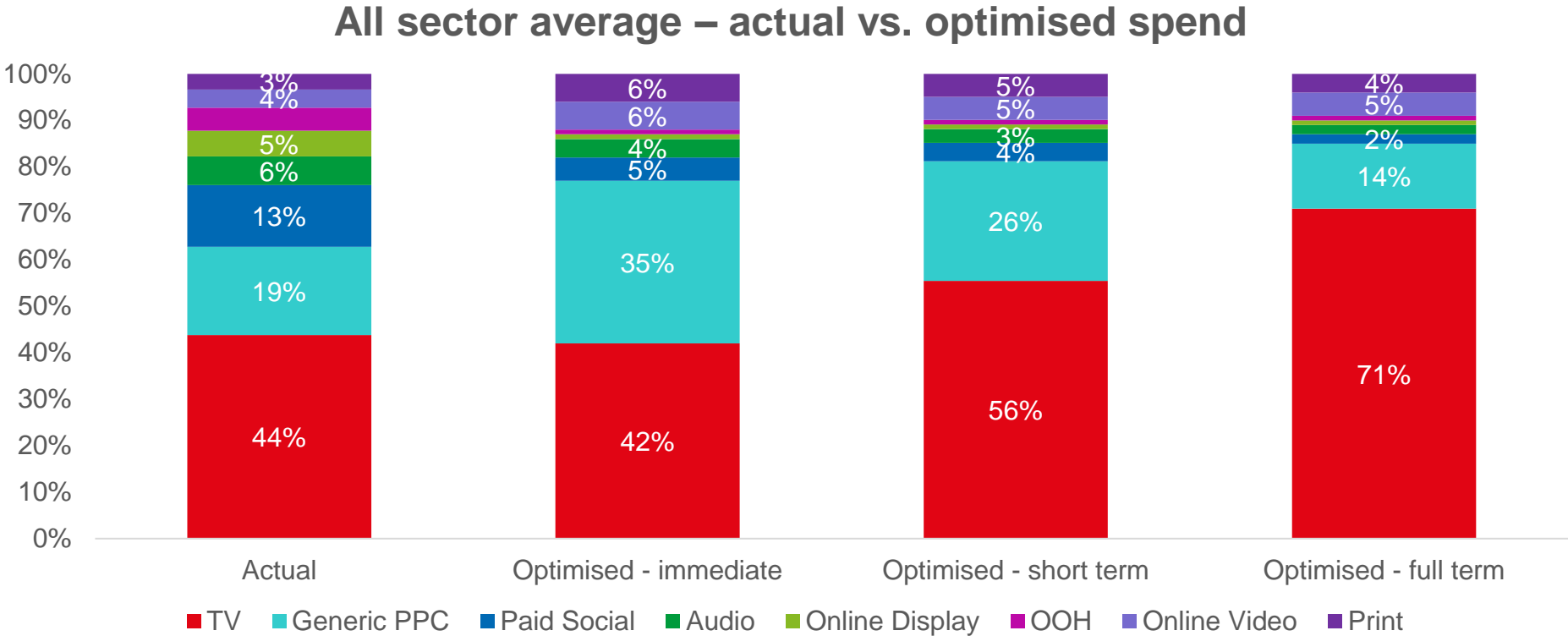
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.

Including full term effects, as an industry we are overinvesting in Paid Social and Generic PPC



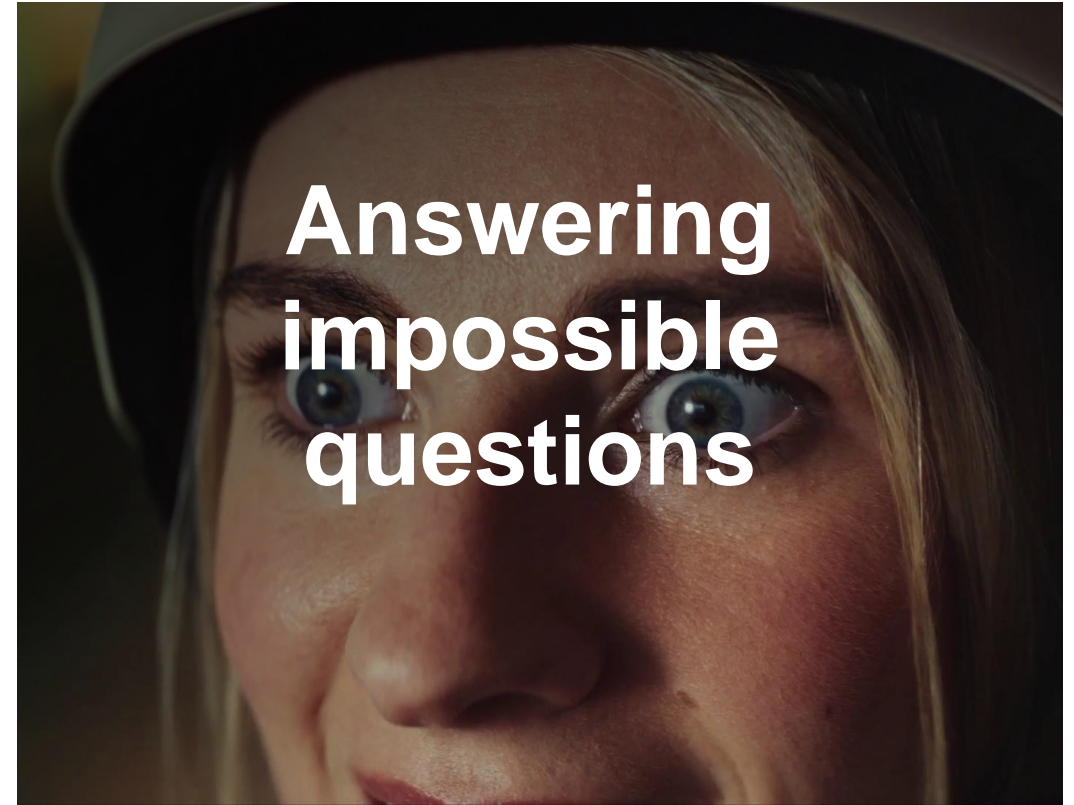
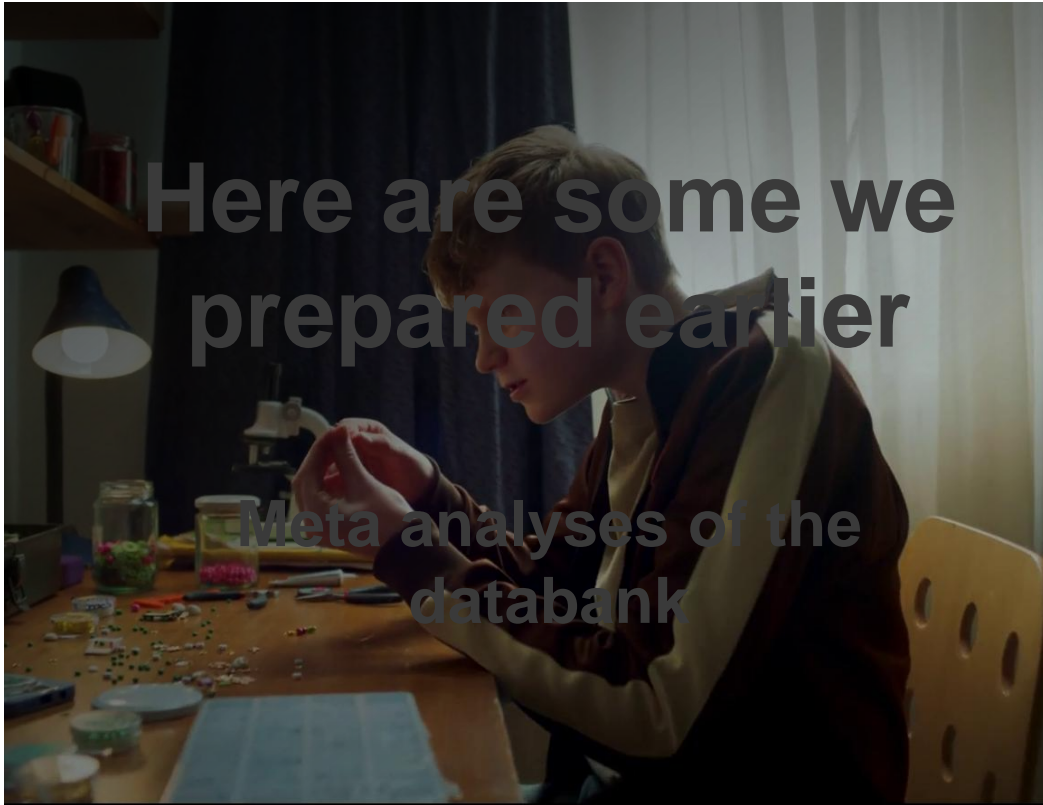
Source: Profit Ability 2, April 2024 – Full term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

For an average brand, the industry is over investing in Paid Social, even when just looking at immediate effects



Source: Actual – Profit Ability 2, Optimised – Media Mix Navigator, All Categories, Mass Market, 31-40% Online Sales, £1bn Brand Size, £15m Budget, High Risk. Excludes Cinema.

The Media Mix Navigator is designed to be helpful



Go and try this for yourselves!

