## Staying power: the longevity of advertising

Anthony Jones, Head of Research, Thinkbox

Ian Wright, Joint Managing Director, Tapestry Research

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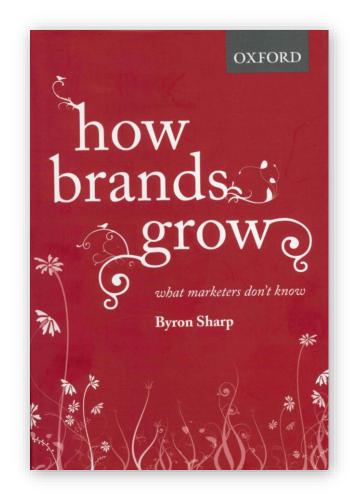


#### **Key principles of brand growth**

Target all potential buyers in the category, not just a niche group of heavy users

Use distinctive assets to build strong, memorable associations

Increase penetration through both physical and mental availability



Source: Prof. Byron Sharp, Ehrenberg-Bass Institute, Australia, 2010





#### Brands have a greater chance of successful growth when...







They have high brand awareness...

...with a rich set of associations linked to multiple buying situations...

...and prominence within consumers' purchasing repertoire



THINK		FEEL		DO	
Encoding	Recall	Attitudes	Intent	Action	Outcome

THINK
FEEL
DO
Encoding Recall Attitudes Intent Action Outcome



#### Factors that increase advertising recall

#### WHERE

the target audience
sees your ad:
the living room
is better than all other
rooms

+22%

#### HOW

they are exposed

to your ad:
a **TV set** is much better than smaller screens

+60%

#### **WHO**

they are with

at the time:
being with others
increases ad recall

+23%

#### **WHAT**

they are watching:
seeing an ad within
professionally-made
content is far superior to
other content

+60%

#### **FEELINGS EVOKED**

The mood viewers are in, with 'feeling happy' contributing to higher recall

+41%

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



THINK
FEEL
DO
Encoding Recall Attitudes Intent Action Outcome



THINK

Encoding Recall

FEEL
Attitudes Intent

DO Action Outcome







LANTERN



THINK

Encoding Recall

FEEL
Attitudes Intent

DO Action Outcome







LANTERN

#### We need a new study to measure Staying Power





## A NEW STUDY TO MEASURE STAYING POWER

#### THERE ARE TWO ELEMENTS TO STAYING POWER



Sustaining its impact for as long as possible

#### **COMING UP**



Under 35s are a more challenging audience to sustain



19,250
people

campaigns

8 weeks

#### FINDING THE RIGHT CAMPAIGNS

#### **Categories**

Diverse range of categories

#### **Multi-platform**

Used TV, social media, OOH, radio, print and/or online

#### **Gen Pop**

Targeted general population

#### **Timing**

Finished around the end of January 2025



#### **ADVERTISERS INCLUDED IN THIS STUDY**



















giffgaff

Collective media spend of ~£50m over the campaign period

(source: Nielsen Ad Intel)

#### THE SURVEY

#### **Brand KPIs**



**Purchase intent** 



**Brand affinity** 



Ad recognition



Ad liking



Brand perceptions

#### THE SURVEY

#### **Brand KPIs**



**Purchase intent** 



**Brand affinity** 



Ad recognition



Ad liking



**Brand perceptions** 

#### Claimed Media Behaviour

(past 7 days)

- Live TV
- VOD
- **Print** (physical)
- Audio (radio, streaming)
- Social Media
- **Online Video** (mostly YouTube)
- Other Online (search, display, other)
- OOH
- Cinema

#### **BUILDING A PROBABILISTIC MODEL**

Each respondent's past 7 days media habits

"Watched ITV at 7pm on Tuesday with my partner"

"Travelled Mon-Fri by bus into central Manchester"

"Read the Daily Mail every day"

"Searched for a holiday on Google"

"Spent hours on TikTok"

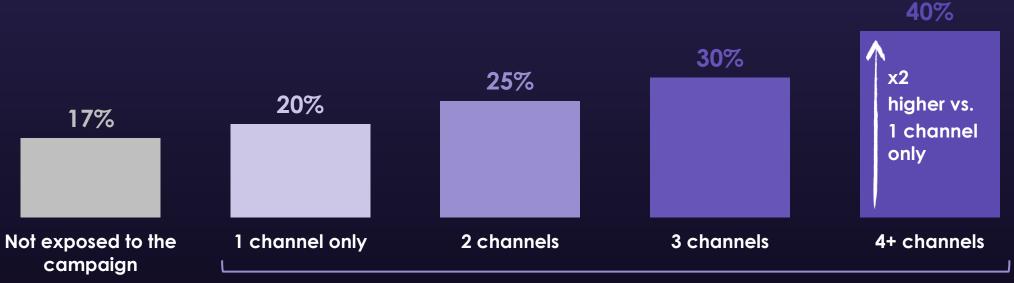
Media plan for each of our 9 advertisers

Probabilistic model estimating
OTS for every one
of our 19,250
respondents



## MORE CHANNELS IN A CAMPAIGN MEANS A HIGHER STARTING POINT FOR PURCHASE INTENT

**% 'Definitely consider'** (avg. across all 9 campaigns soon after the campaign), all adults 18-75 (nat rep)



No. channels exposed to in the campaign

Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)

A5 [Definitely consider]. How likely (if at all) would you be to consider [SELECTED BRAND] the next time you come to [CATEGORY OCCASION]? Base: 19,251 respondents aged 18-75



#### FOUR WAVES OF LONGITUDINAL DATA



To normalise for campaign spend, category and audience effects, all data for waves 2-4 has been indexed to wave 1



Soon after the campaign

31st Jan – 14th Feb 2025

Wave 2

2-4 weeks post campaign

14<sup>th</sup> – 28<sup>th</sup> Feb 2025

Wave 3

4-6 weeks post campaign

28<sup>th</sup> Feb – 14<sup>th</sup> March 2025

Wave 4

6-8 weeks post campaign

14<sup>th</sup> – 28<sup>th</sup> March 2025



## LONGITUDINAL TRACKING IS THE MOST ACCURATE WAY TO MEASURE DECAY

#### Regular tracker

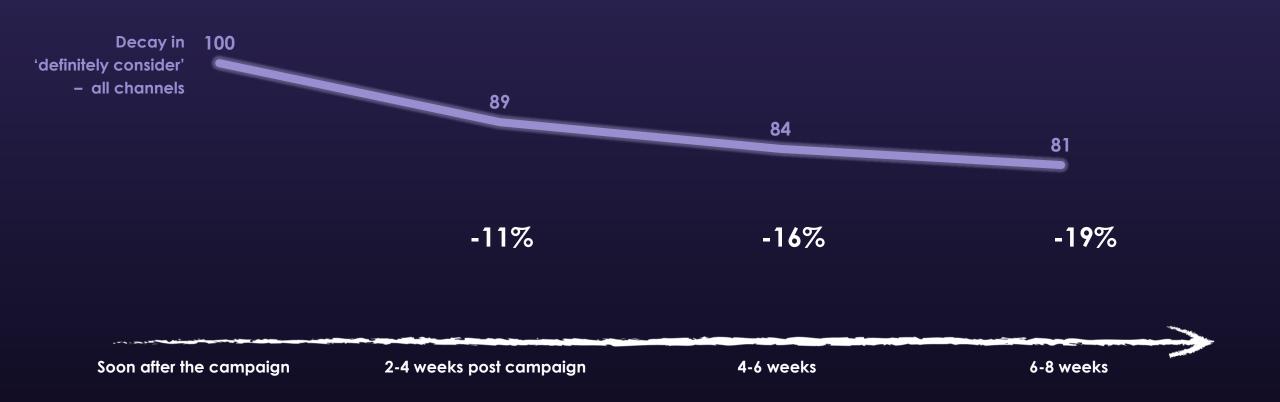
- Tracks metrics among the population
- Other things being equal is very stable

#### Longitudinal tracker

- Tracks metrics for a person
- More responsive to external factors

# WHAT DOES THE DECAY LOOK LIKE FOR PURCHASE INTENT POST-CAMPAIGN?

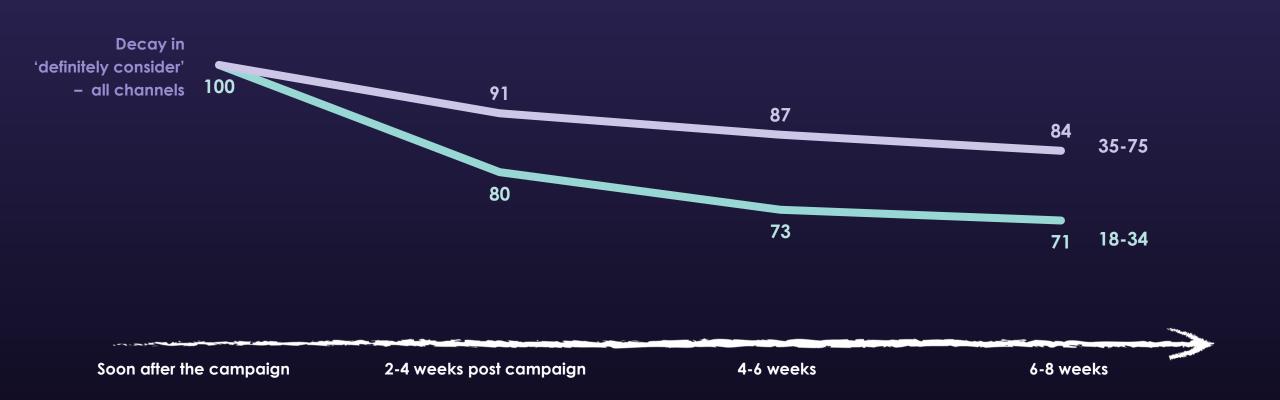
#### PURCHASE INTENT DECAYS SHARPLY INITIALLY



**Purchase intent ('definitely consider'):** All brands, among those exposed, indexed to wave 1 (nat rep, 18-75)



#### THE DECAY IS ESPECIALLY STEEP FOR UNDER 35s

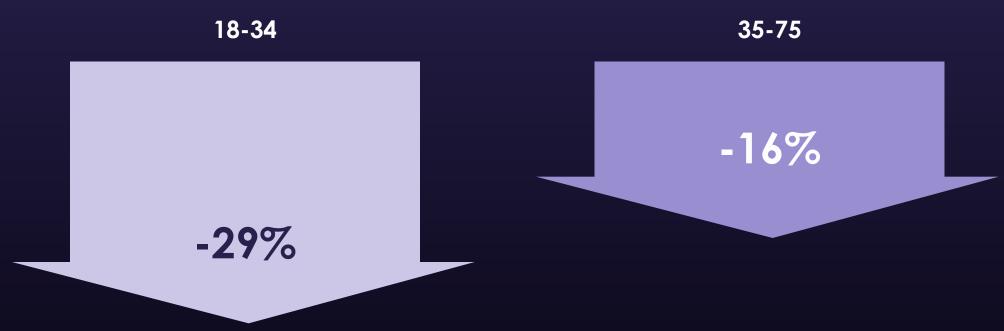


**Purchase intent** ('definitely consider'): All brands, among those exposed, indexed to wave 1 (nat rep. 18-75)



#### DECAY IS ALMOST TWICE AS HIGH AMONG 18-34s

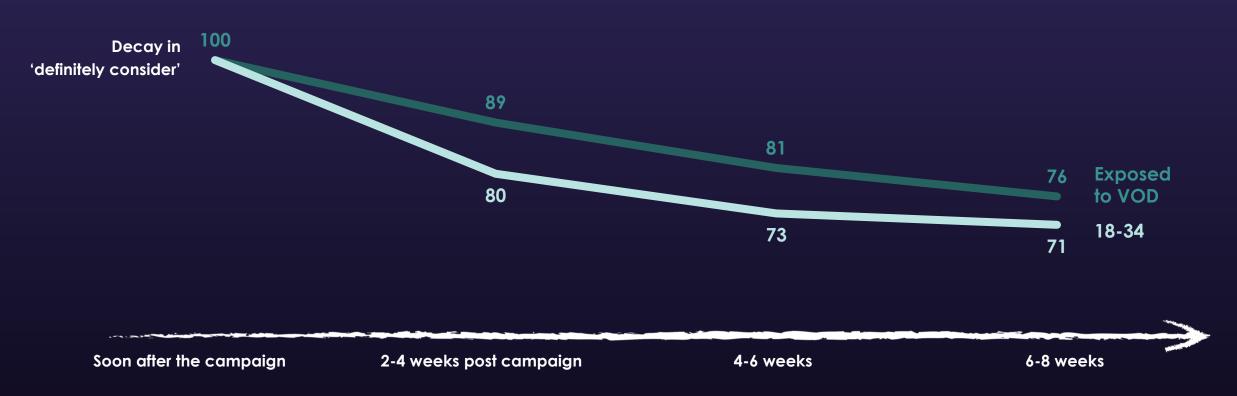




Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)



## VOD HAS THE MOST STAYING POWER OF ANY PLATFORM FOR UNDER 35s



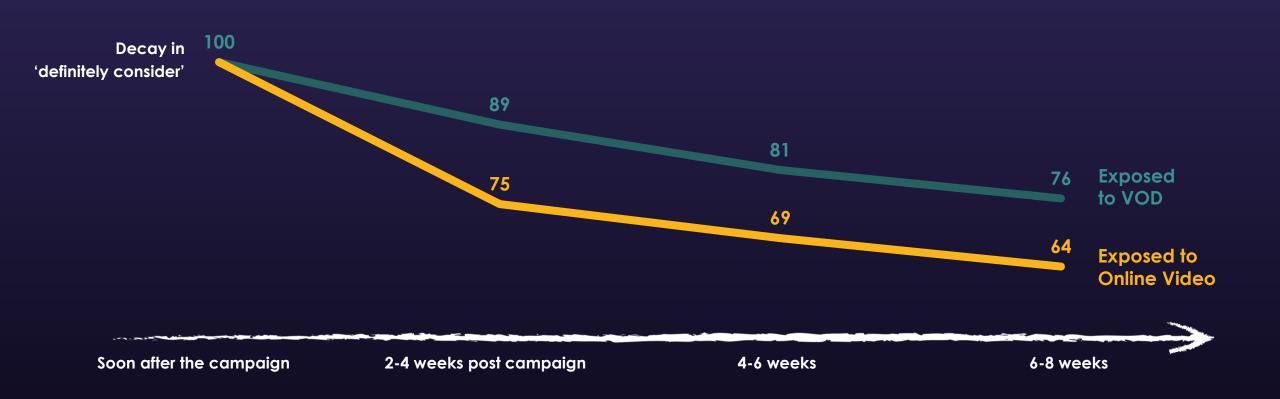
**Purchase intent** ('definitely consider'): All brands, among those exposed, indexed to wave 1 (nat rep. 18-34)

Online Video is mostly YouTube

A5 [Definitely consider]. How likely (if at all) would you be to consider [SELECTED BRAND] the next time you come to [CATEGORY OCCASION]? Base: 4.463 respondents aged 18-34; 4,463 Wave 1, 1,078 Wave 2, 1,286 Wave 3, 785 Wave 4



#### DECAY IS FAR STEEPER FOR ONLINE VIDEO



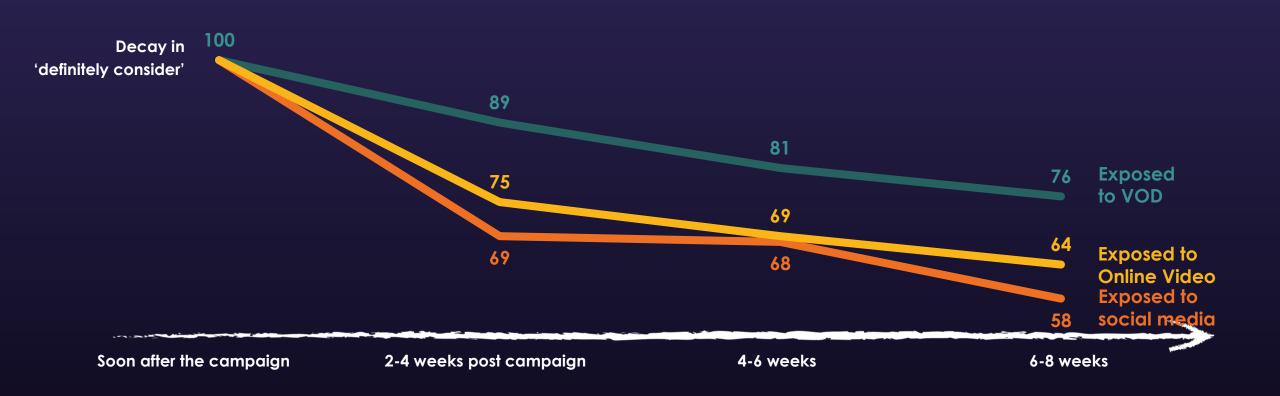
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#### AND STEEPER STILL FOR SOCIAL MEDIA



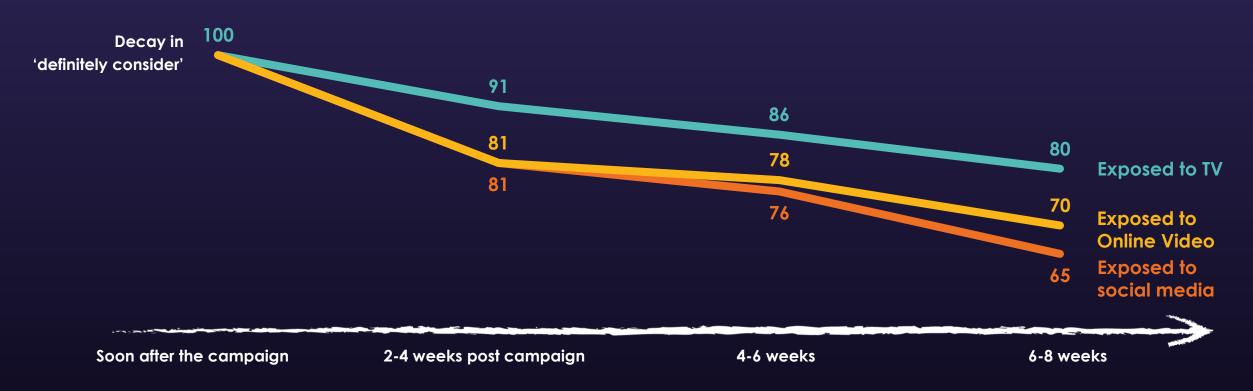
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### ACROSS ALL 18-75s, SOCIAL MEDIA & ONLINE VIDEO SHOW MORE DECAY IN PURCHASE INTENT THAN TV



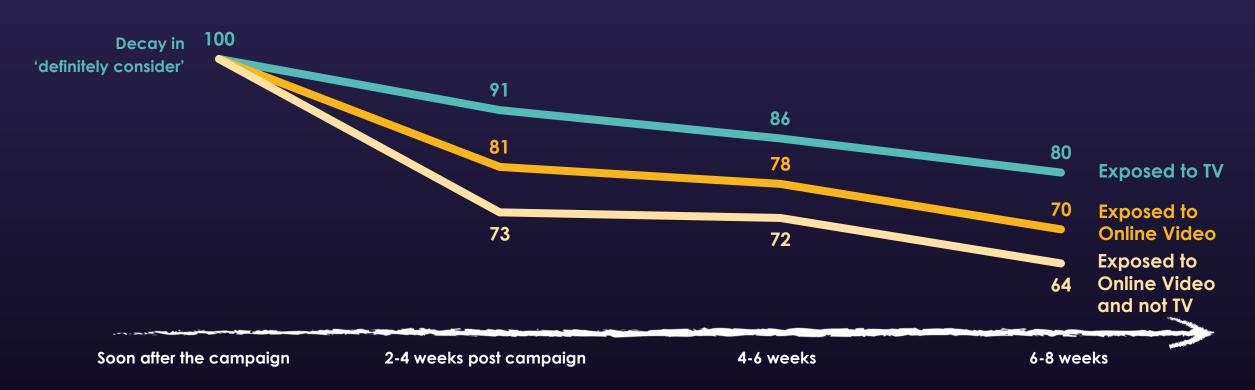
Purchase intent ('definitely consider'): All brands, among those exposed, indexed to wave 1 (nat rep, 18-75)

Online Video is mostly YouTube



# THE MULTIMEDIA NATURE OF THESE CAMPAIGNS MEANS THAT 55% OF THOSE EXPOSED TO ONLINE VIDEO WERE ALSO EXPOSED TO TV

## IF WE REMOVE TV THEN THE DECAY CURVE FOR ONLINE VIDEO BECOMES EVEN MORE STEEP



Purchase intent ('definitely consider'): All brands, among those exposed, indexed to wave 1 (nat rep, 18-75)

Online Video is mostly YouTube



## IF TV IS NOT INCLUDED WITH ONLINE VIDEO, PURCHASE INTENT FALLS BY 23% OVER THE EIGHT WEEKS



Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)

Online Video is mostly YouTube



## IF TV IS NOT INCLUDED WITH SOCIAL MEDIA, PURCHASE INTENT FALLS BY 17% OVER THE EIGHT WEEKS

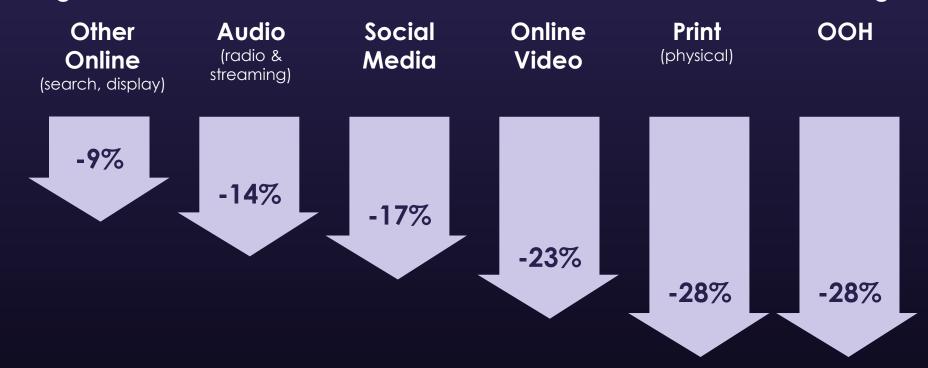


Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)



### WITHOUT TV THE IMPACT OF ALL OTHER MEDIA IS SIGNIFICANTLY LOWER OVER THE 8 WEEK PERIOD

% average reduction in Purchase Intent over 8 weeks if TV is NOT included alongside...



**Purchase intent** ('definitely consider'): All brands, among those exposed (nat rep. 18-75)

Online Video is mostly YouTube



### THE IMPACT OF OTHER MEDIA ON PURCHASE INTENT IS BOOSTED BY TV

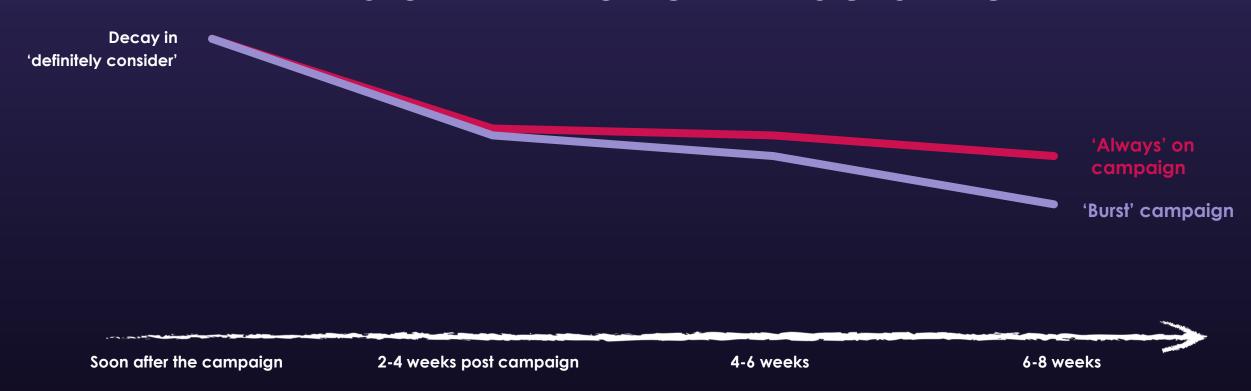
+26%

UPLIFT (AVG.) TO PURCHASE INTENT OVER 8 WEEKS BY INCLUDING TV WITH OTHER MEDIA

Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)



### AS WELL AS USING TV IN THE PLAN, ADOPTING AN 'ALWAYS ON' APPROACH REDUCES DECAY



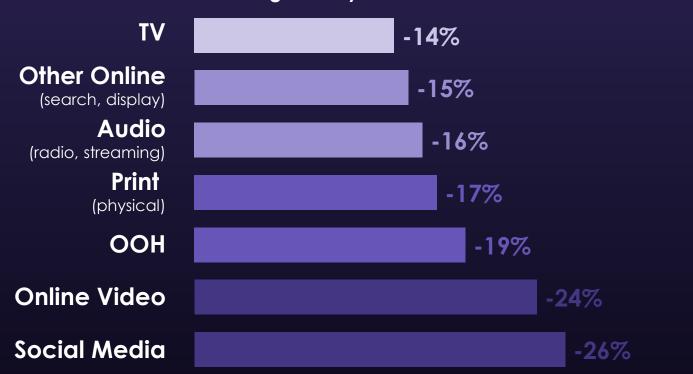
Purchase intent ('definitely consider'): 'Always on' vs. 'Burst' brand campaigns, among those exposed, indexed to wave 1 (nat rep, 18-75)



# WHAT DOES THE DECAY LOOK LIKE FOR OTHER MEDIA?

### OVER 8 WEEKS, TV SHOWS THE WEAKEST DECAY IN PURCHASE INTENT

% average decay in Purchase Intent across the 8 weeks...



Purchase intent ('definitely consider'): All brands, among those exposed (nat rep, 18-75)

Online Video is mostly YouTube

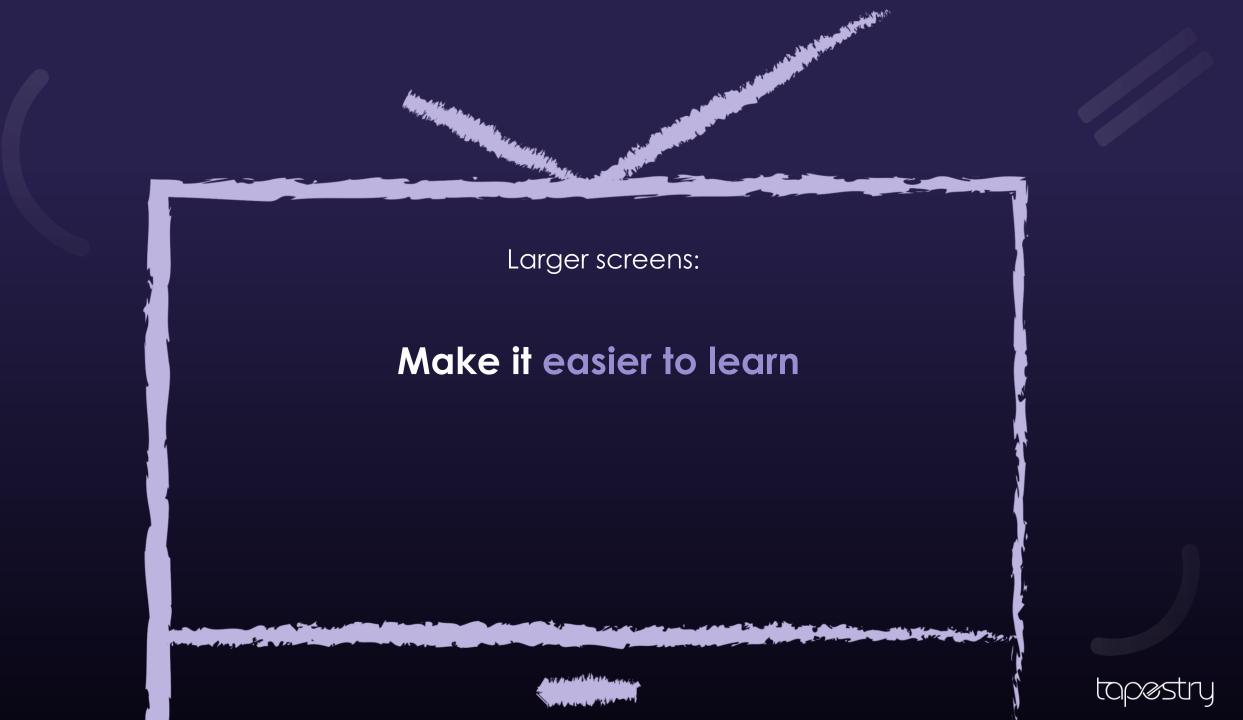


#### WHY IS DECAY LESS STEEP FOR TV?

TV viewing is rooted in the **living room** 

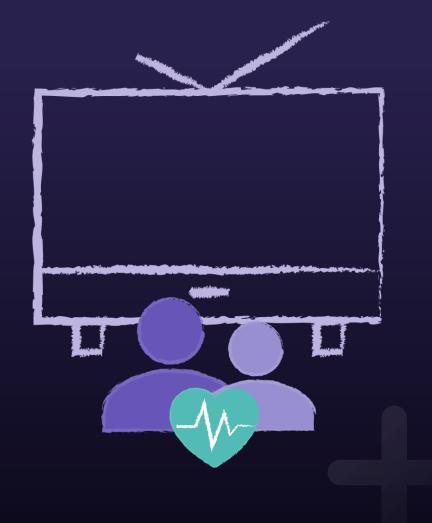
TV is typically watched on a big screen







#### WE BOND WHEN WE WATCH TOGETHER



#### LIKING OF THE TV ADS INCLUDED IN THIS STUDY IS



## HIGHER AMONG THOSE WHO WERE EXPOSED TO THEM WITH OTHERS

(VS. THOSE SEEING ALONE)

B2. Thinking back to when you last saw this advert before today, was this an ad you enjoyed watching/seeing?
Base: 6,300 respondents aged 18-75 (average per campaign) exposed to TV ad when watching TV with others / 3,600 respondents aged 18-75 (average per campaign) exposed to TV ad when watching TV alone



## TRUST IN A BRAND IS SUSTAINED WHEN CONSUMERS ARE EXPOSED TO AN AD ON TV WITH OTHER PEOPLE (ON A TV SCREEN)

Improvement in decay 6-8 weeks post campaign for 'trusted' (avg. across all 9 campaigns, all adults 18-75 (nat rep)



A6. Which of these words or phrases would you use to describe [SELECTED BRAND]? Please select all that apply. Base: 19,251 respondents aged 18-75; 19,251 Wave 1, 5,569 Wave 2, 6,000 Wave 3, 3,595 Wave 4



# MORE EMOTIVE BRAND ASSOCIATIONS 'FOR PEOPLE LIKE ME', 'VALUES CUSTOMERS', 'UNIQUE' ARE SUSTAINED AMONG THOSE EXPOSED TO TV WITH OTHERS

+16%

**IMPROVEMENT IN DECAY AFTER 6-8 WEEKS** 

A6. Which of these words or phrases would you use to describe [SELECTED BRAND]? Please select all that apply.

Base: 6,300 respondents aged 18-75 (average per campaign) exposed to TV ad when watching TV with others / 3,600 respondents aged 18-75 (average per campaign) exposed to TV ad when watching TV alone

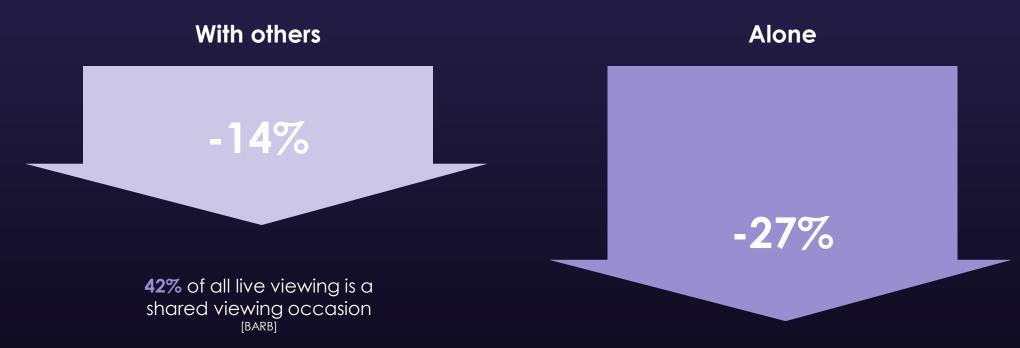


#### WE CREATE A 'SHARED REALITY'



#### DECAY IS REDUCED WHEN WATCHING WITH OTHERS

Average decay in Purchase Intent 6-8 weeks post-campaign when exposed to TV ads...



Purchase intent ('definitely consider'): All brands, among those exposed to TV (nat rep, 18-75)

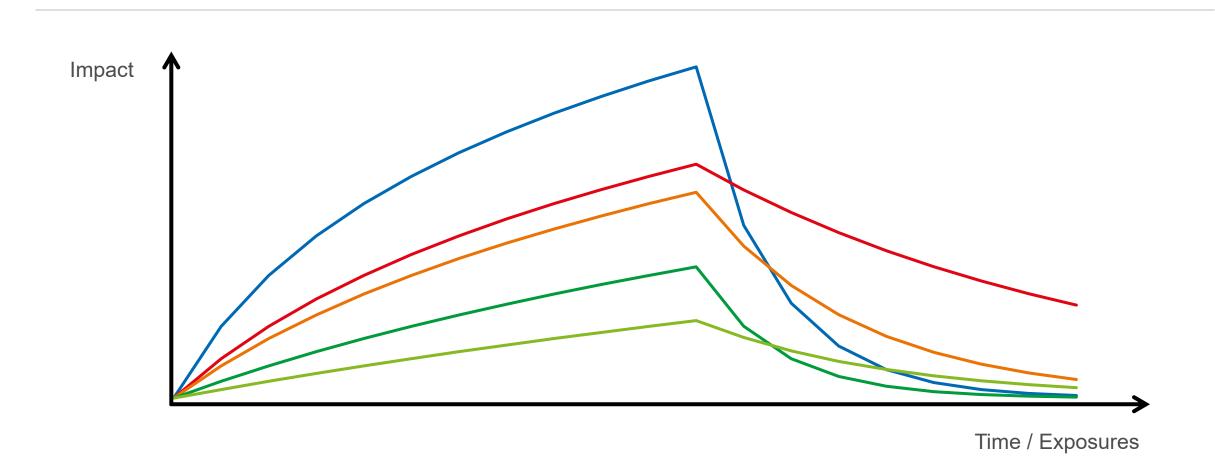
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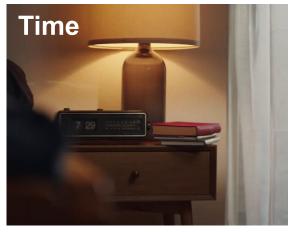


#### Consider contexts that both drive growth and reduce decay

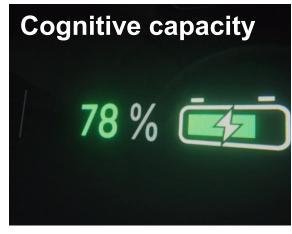


#### What cognitive science explains about ad Staying Power









Brand new information is harder to retain than things that fit into existing mental frameworks Weakest encodings have most rapid drop off

Physical location

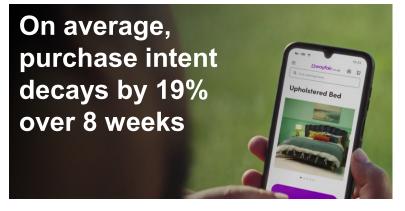
Adjacent editorial context

Social context

Multi-tasking
Emotional state
Physical state

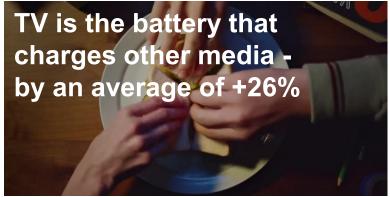


#### **Staying Power summary**



Purchase intent decay is much quicker for under 35s (+81% over 8 weeks vs. 35+)

For under 35s,
Online Video purchase
intent decay is 50% greater
than VOD over 8 weeks



48% lower decay
when exposed to
TV ads with others
(vs. alone)

Liking of ads +75%
higher amongst
those watching TV
with other people

Source: Staying Power, Tapestry Research, 2025

#### Implications for brands

Plan for decay as well as initial impact

Not all impressions are equal, and TV makes lasting impressions:

- TV remains stronger for longer
- TV boosts the impact of other media

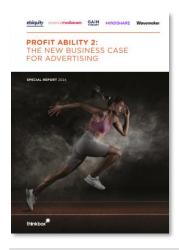
Plan for shared viewing occasions:

- —23% higher recall
- 75% higher ad liking
- 15% higher brand trust
- —48% lower purchase intent decay





#### Final words...









Profit Ability 2 has quantified TV's ability to deliver profit over time

Lantern highlighting TV's incremental impact on online outcomes

Optimising in-home ad context can boost advertising recall by 6.3x

Professional content, shared viewing and screen size are key factors

TV is the best channel at helping maintain purchase intent

TV is the battery that charges other media



### Trust transformed

Elliott Millard, Chief Strategy Officer, Thinkbox

Nailah Uddin, Research Manager, Thinkbox

Faye Longega, Strategy Partner, WPP Media

, thi<mark>nkbox</mark>



#### The next 20 minutes

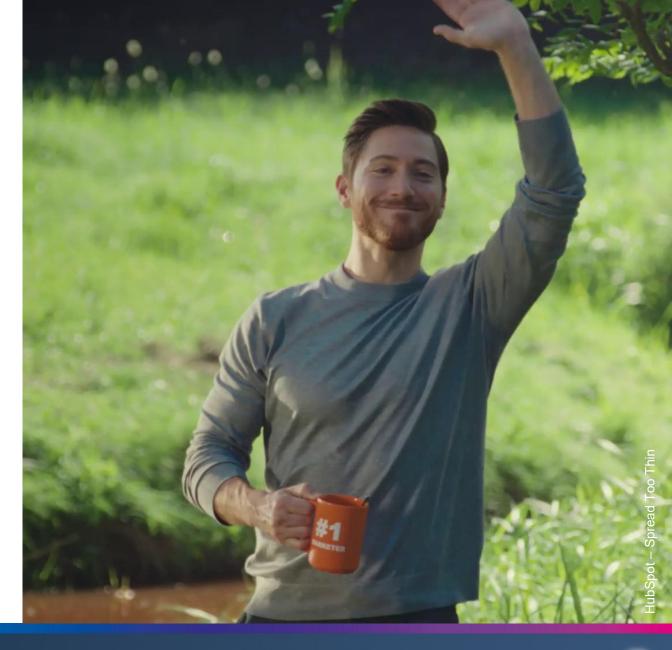
WHY TRUST MATTERS

TRUST AND CATEGORY DIFFERENCES

WHERE YOU ADVERTISE SHAPES TRUST

A SURPRISING GENERATIONAL DIVIDE

**IMPLICATIONS** 





#### **Everyone seems to want to talk about trust**

10 Jul 2025 | Ellie Hammonds

Trust offers competitive edge — but businesses are failing to deliver it

07 Mar 2025 | Kate O'Loughlin

We can only accelerate action if we rebuild trust and safetv

13 Mar 2025 | Maria lu

Future 100: Industry needs more collaboration and trust

Beau Jackson May 09, 2025 Channel 4 calls on ad industry to invest in trusted news: 'Outrage about ad placement quality must end

Charlotte Rawlings | October 03, 2024

'It all comes down to trust': KFC and Mother on how to

create a cult

Advertising 'no longer the least-trusted industry', says **AA research** 

10 Jun 2025 | Nicola Kemp

Honesty, integrity, trust: Media's Al arms race shames

Media Future of TV

26 Nov 2024 | James Best

Trust isn't just about awareness — it's about understanding

Alessandra Scotto di Santolo | August 01, 2024

advertising'

AI Taskforce: AI should not be

used to 'undermine trust in

The trust premium: backing quality media isn't a virtue, it's a business

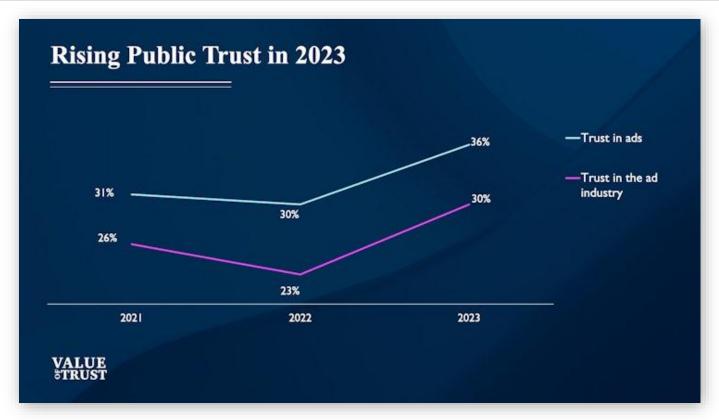
18 Aug 2025 | Nick Manning

Truth matters in media planning. How can we get it back?

How to win back consumer trust in an ever-evolving digital landscape

Source: The Media Leader, Campaign, Videoweek, The Drum

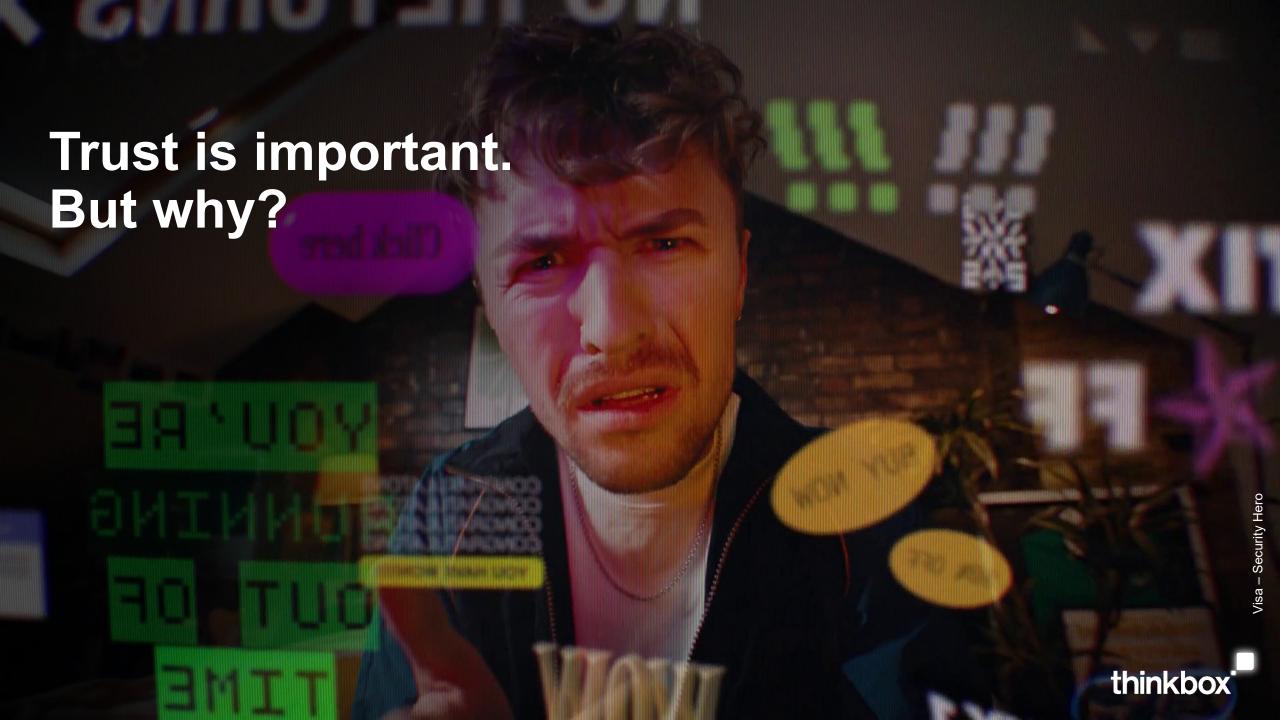
#### Partly because it's a challenge for the industry



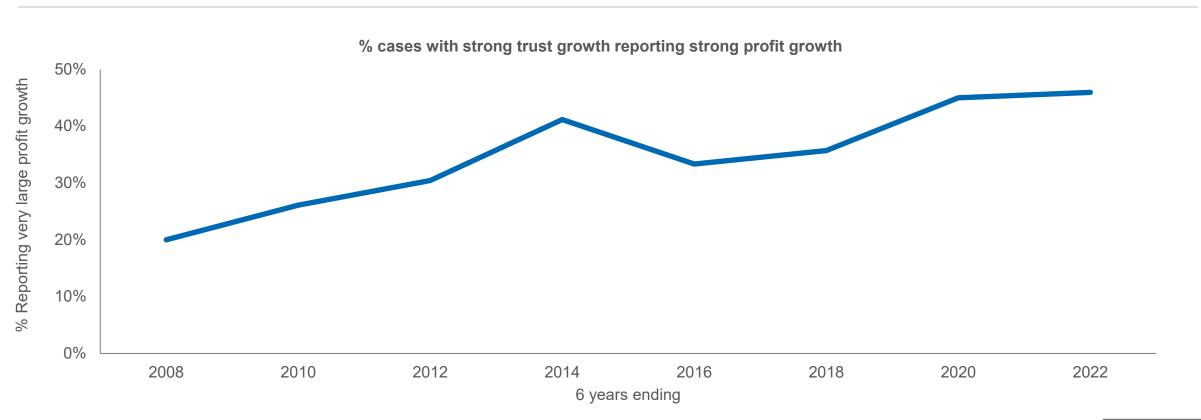
Source: https://www.marketingweek.com/consumer-trust-advertising-decade. The Value of Trust, Advertising Association, Credos. 2023.







#### At a macro level, trust is linked to profit



Source: IPA Databank 2004-2022 for profit cases reporting very large trust improvements. NB: insufficient data prior to 2008.

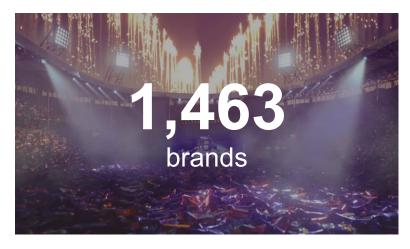


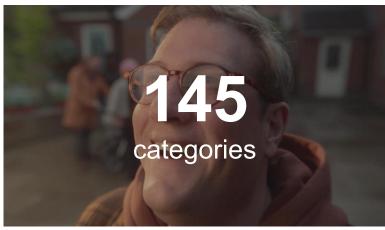


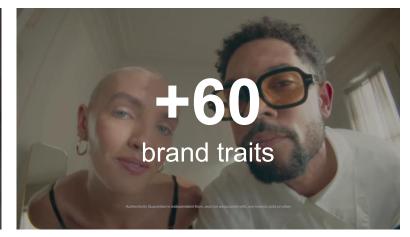




#### But we wanted to go deeper and look at individual brands



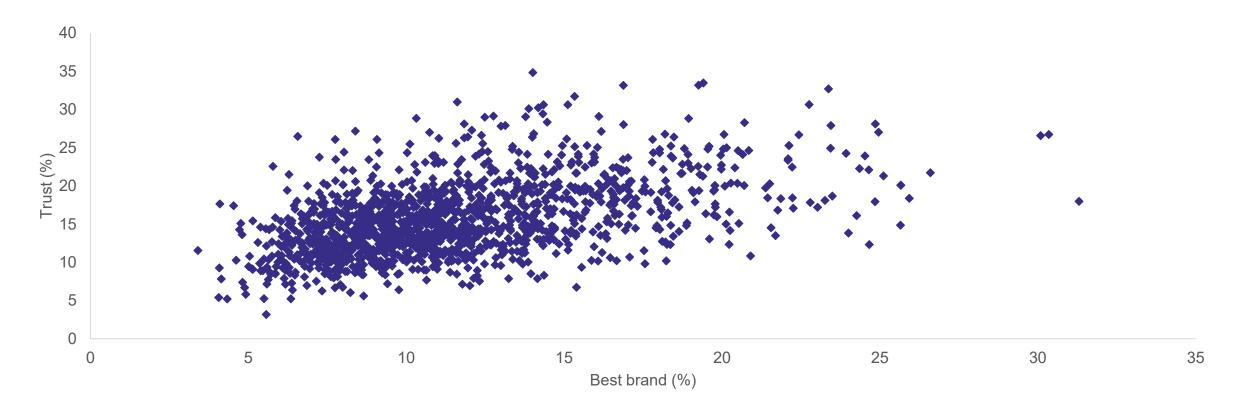




Source: BAV, WPP

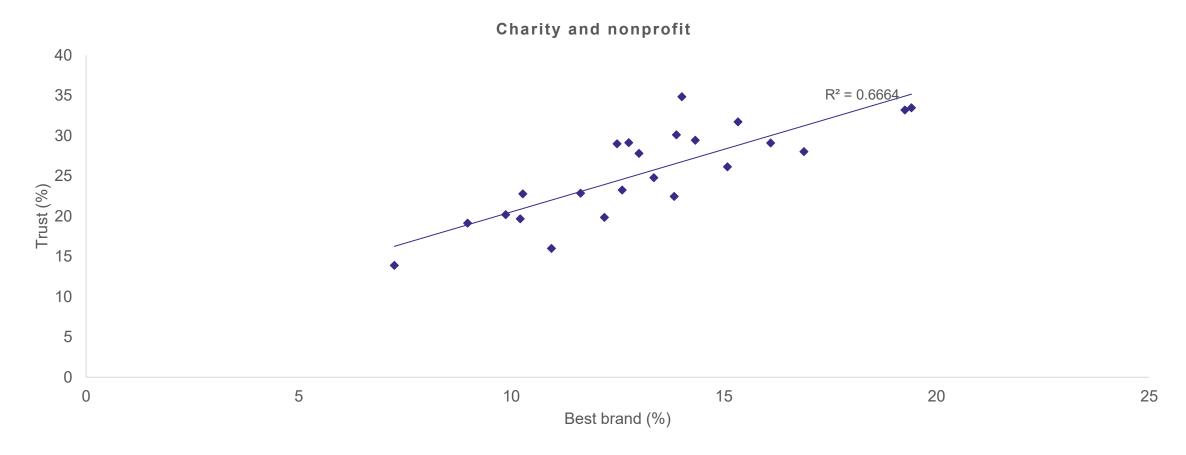


#### At a total brand level, the relationship is masked



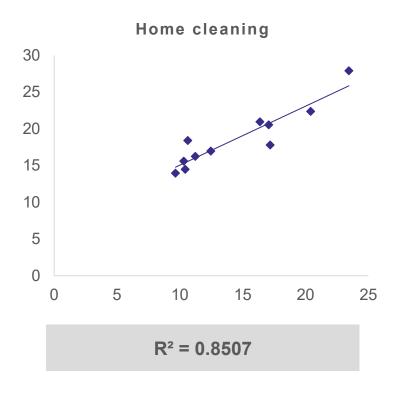


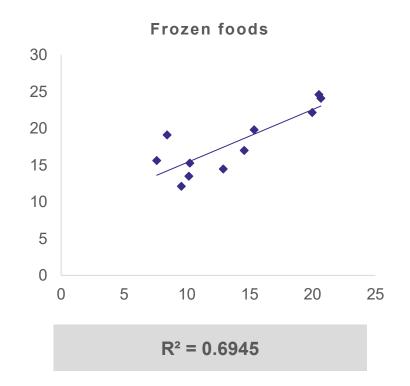
#### **But by category...**

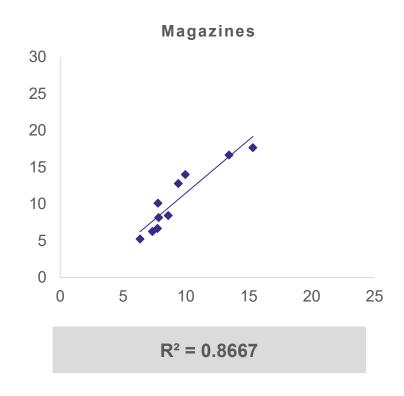




#### Trust and best brand are strongly linked within category



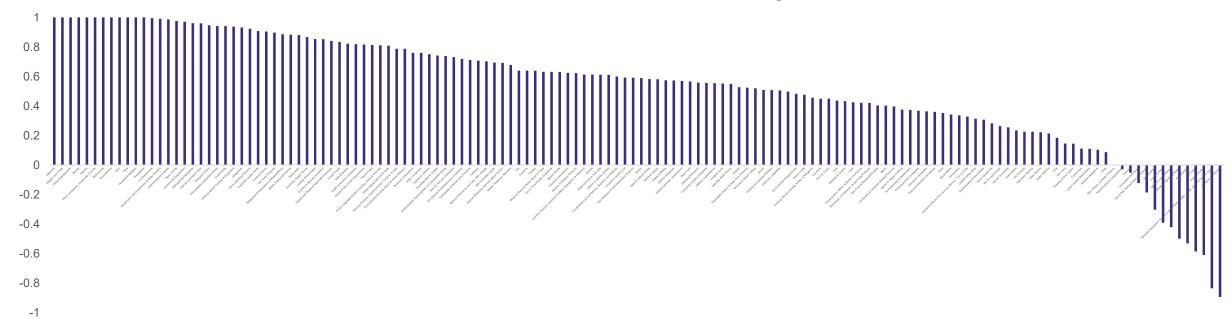






### 88% of categories have a moderate to strong correlation between best brand and trust

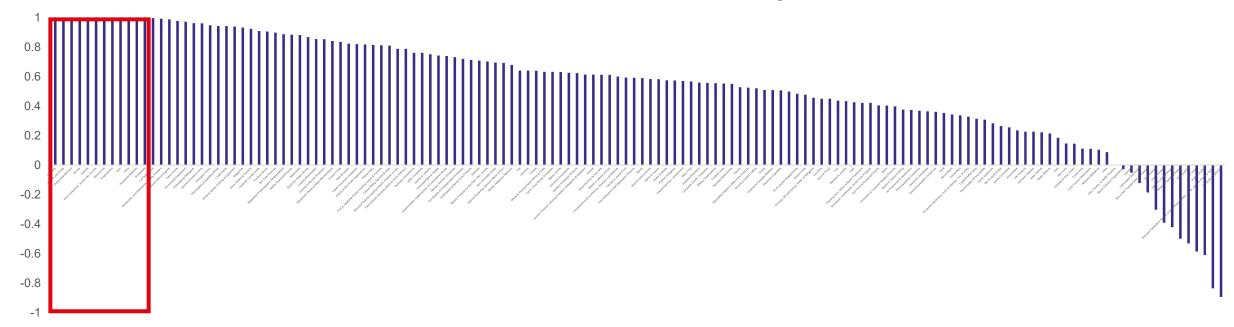
Trust and best brand correlation of all categories





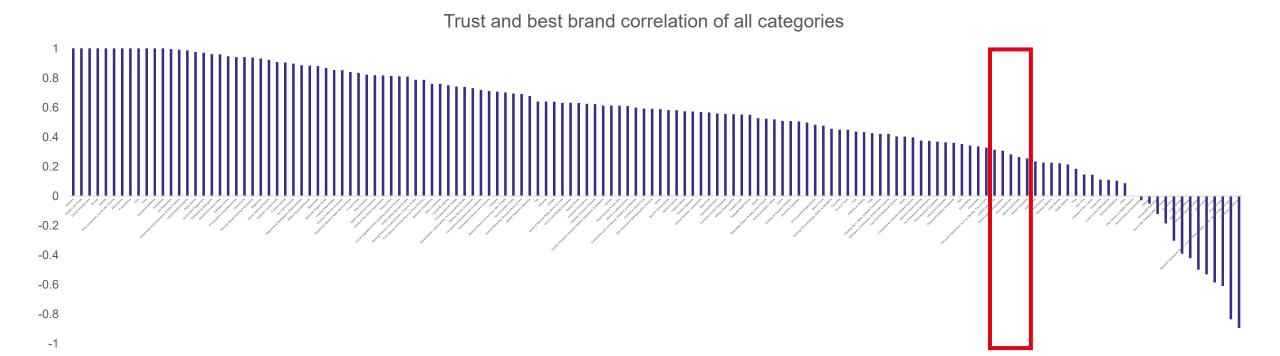
#### The highest correlation is predictably for high risk categories





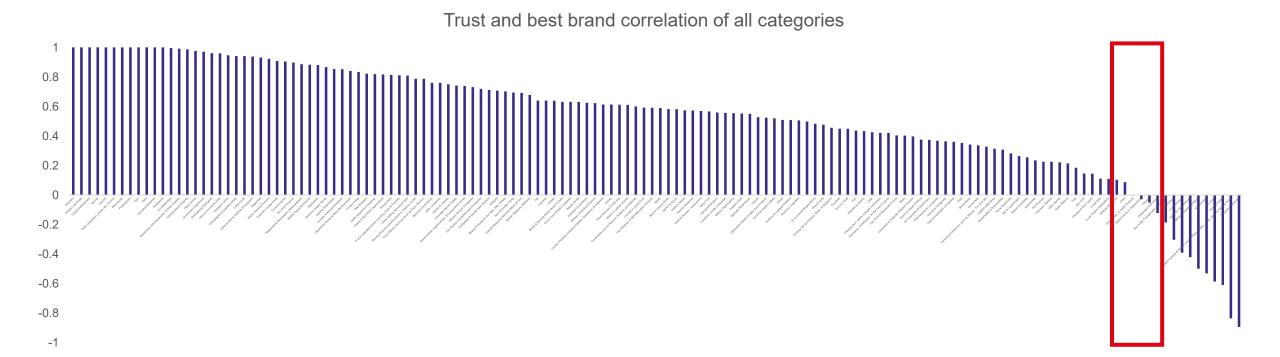


#### The lowest meaningful correlation categories are functional





# Some categories have almost no clear relationship

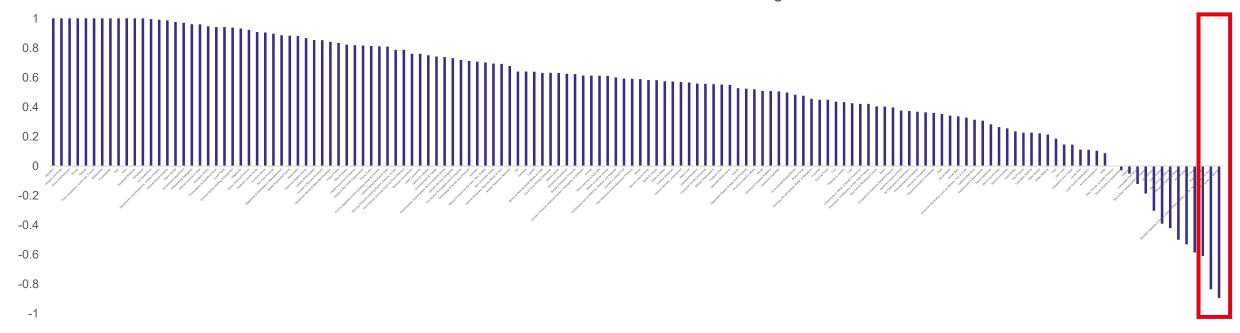


Source: Brand Asset Valuator, WPP, 2025



# And a very small number have strong negative correlation





Source: Brand Asset Valuator, WPP, 2025





# Focus on the areas where your choices can make a difference

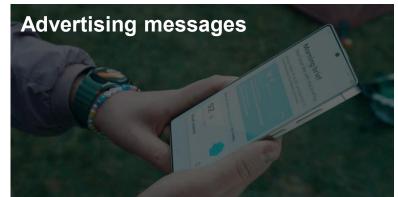








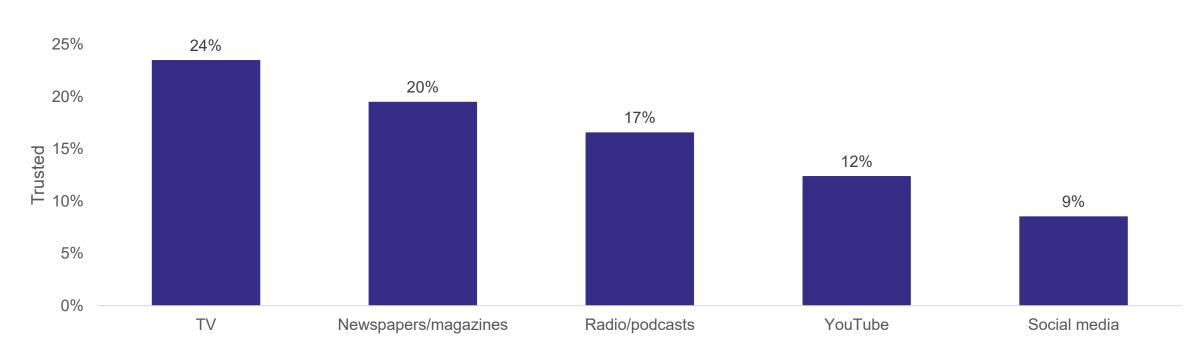






# At a headline level, people trust brands on TV more than anything else







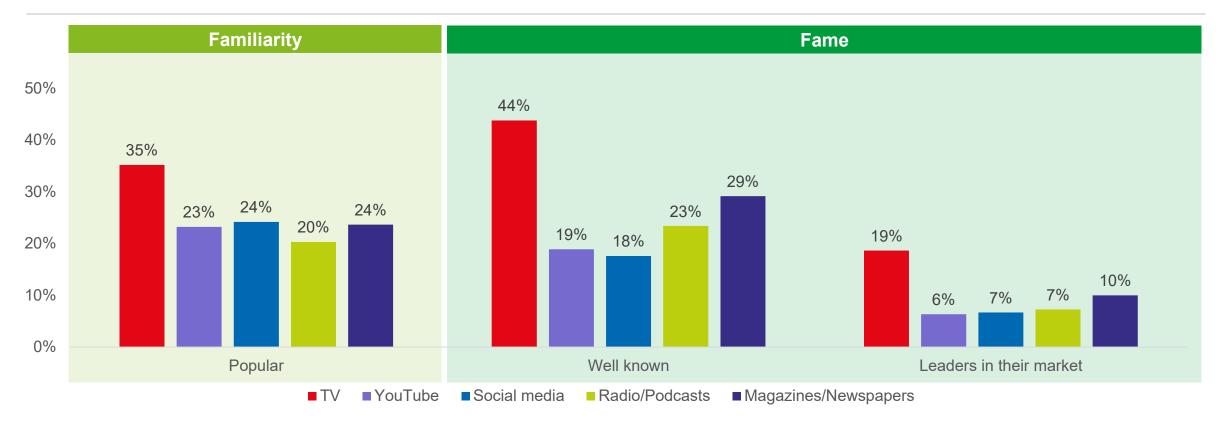


## Trust is built through two mechanisms



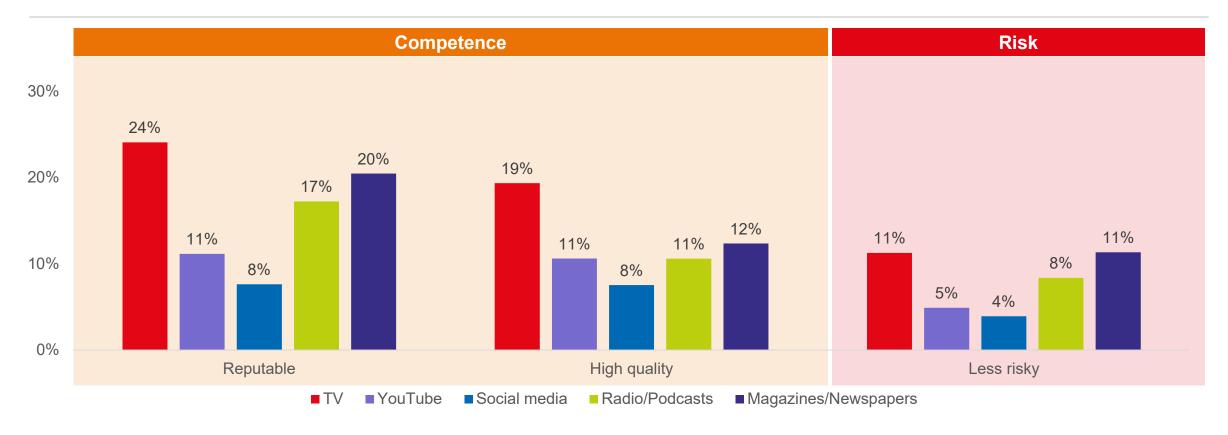
Source: Trust. A Newsworks Report, 2023.

# TV outranks other channels on the two pillars that help build trust

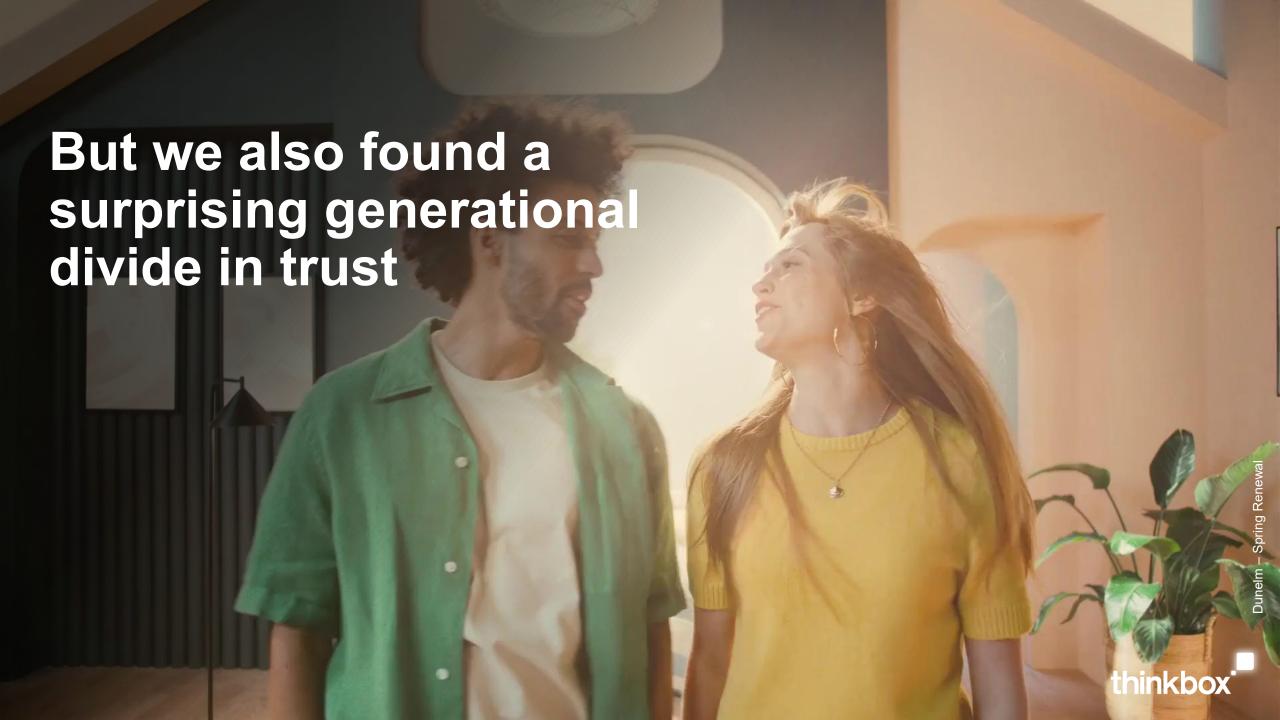




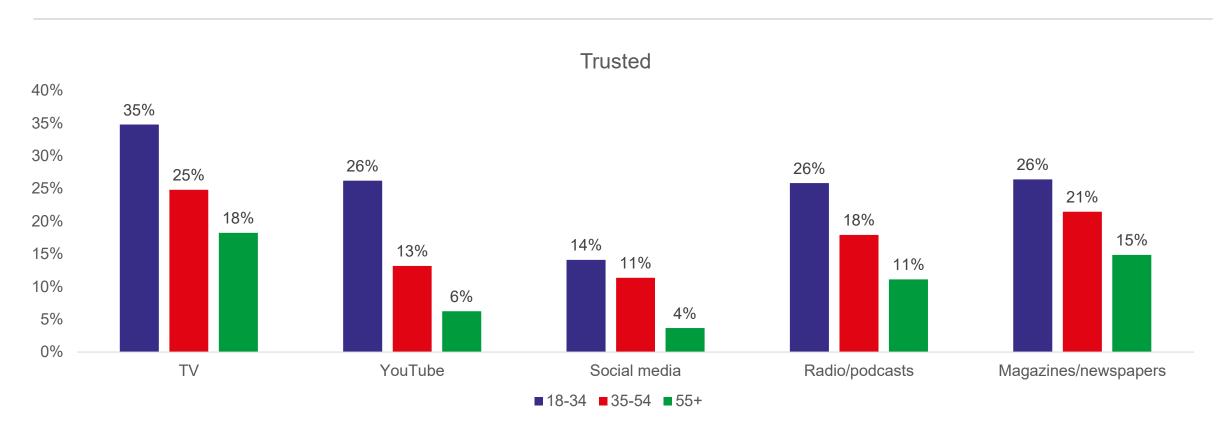
# As well as the metrics that mitigate 'trust drag'





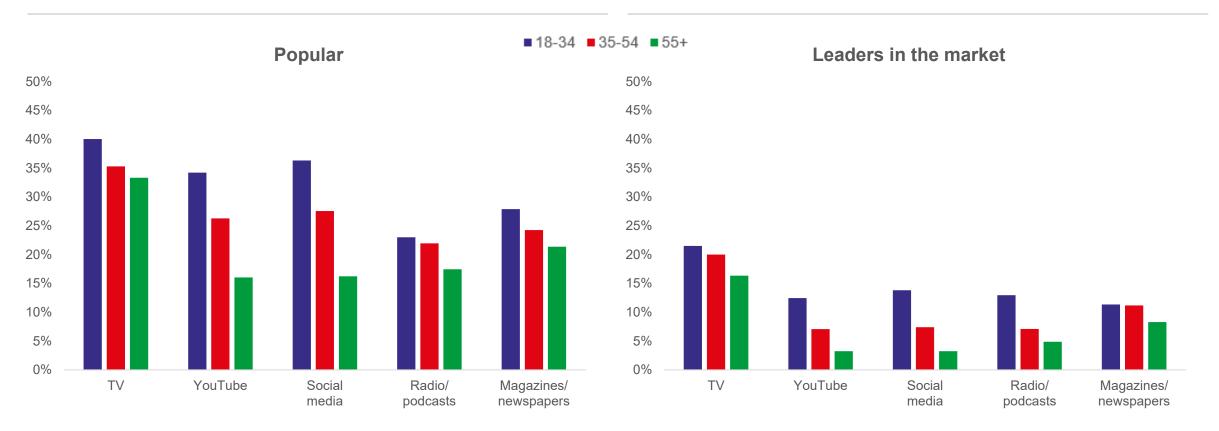


### Across all channels, brand trust falls as age increases



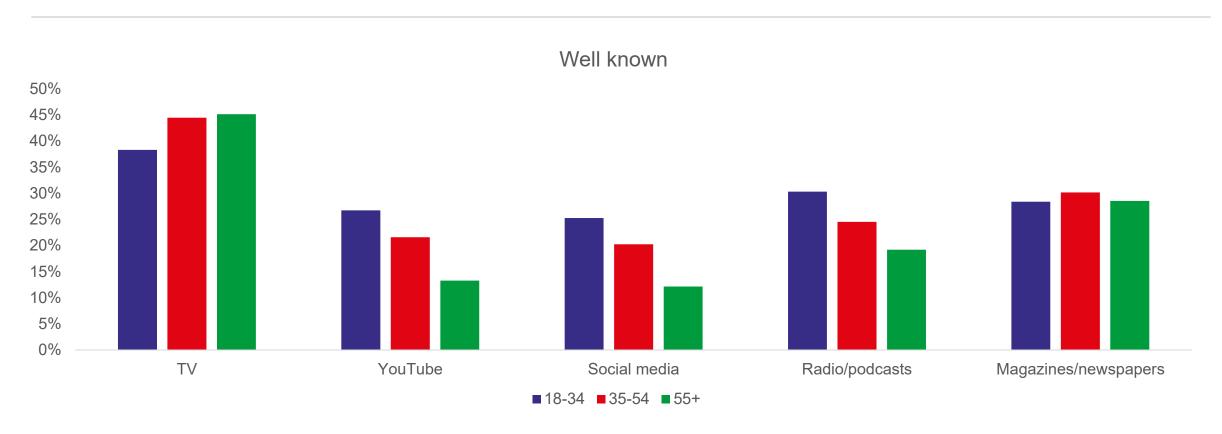


### Popularity and leadership follow the same pattern





#### Recognition stronger with older audiences







### And their most trusted brands are quite different

**UNDER** 35s













**OVER** 35s











Source: Brand Asset Valuator, WPP, 2025

Trust is a high-cost hurdle—a screening device or 'filter'

They give lower average trust scores (15%) and reserve their highest scores for established institutions and non-profits

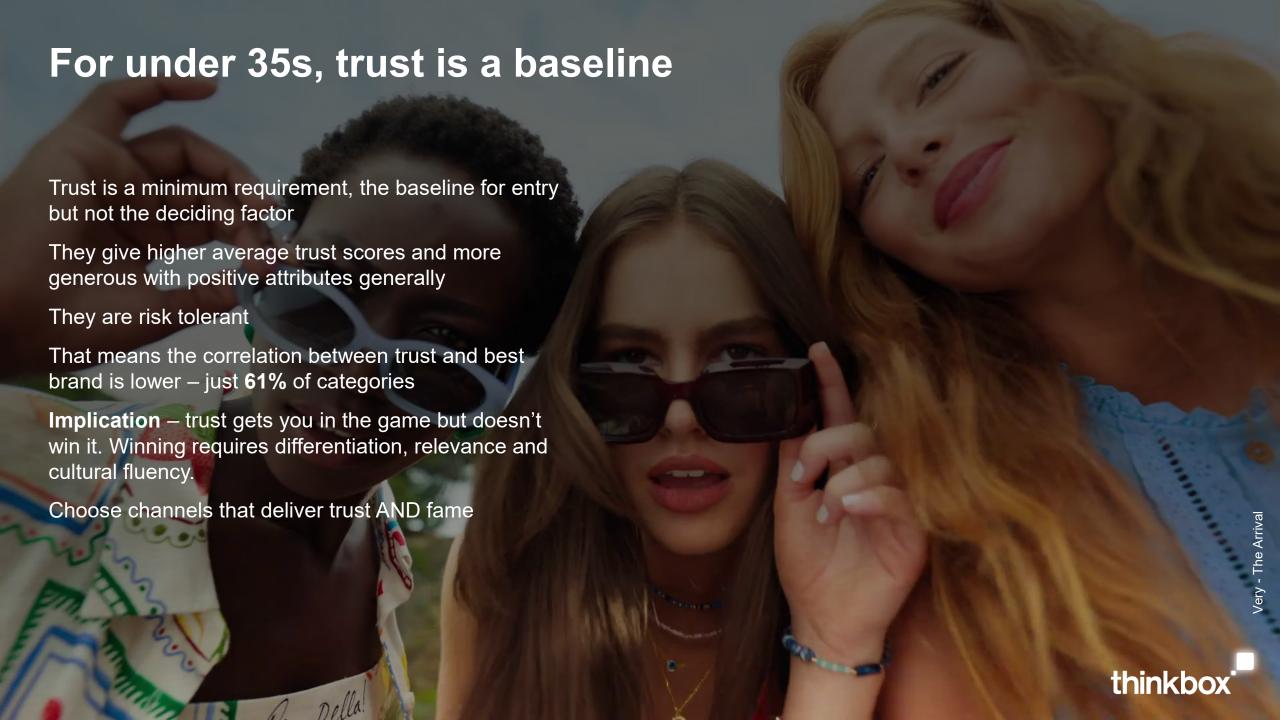
They are risk-averse

That means the correlation between trust and best brand is very high – **86**% of categories

**Implication** – for a brand to be 'best' it has to pass a strict trust filter. Trust is a decisive factor: once trust is established, quality and reliability matter most.

Double down on trusted channels







### Where your brand advertises shapes how it's trusted















