

**The year in numbers**

Facts, figures and charts telling  
TV's story in 2019  
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**Insight**

Award-winning research, new tools  
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**Views from the top**

ISBA's Bobi Carley interviews  
TV's commercial chiefs  
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# A year in TV

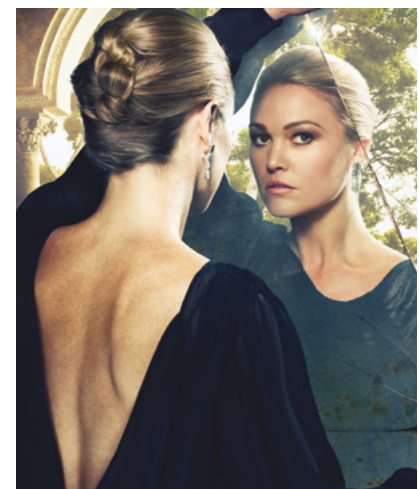
Thinkbox Annual Review 2019-20



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# Welcome

From Lindsey Clay



We live in strange times. The coronavirus puts every aspect of our lives into very sharp and shocking relief. I hope that you and yours are OK.

As I write this, from home, TV is benefiting from people spending so much time indoors. Viewing is increasing. As society becomes temporarily atomised, TV is there for us all as a source of information and distraction. It can comfort and connect.

We compiled the contents of this 'A Year in TV' before the virus hit our lives so dramatically. No doubt in next year's we will reflect on how the pandemic affected TV. It is a very faint, professional silver lining that TV's vital roles in our lives are so clear in a time of crisis. TV advertising too has an important role to play in keeping commerce going, especially as other forms of advertising are temporarily removed from our lives.

The show goes on. And this publication is all about TV's brilliant shows and the unrivalled commercial environment they provide businesses with.

In the coming pages, we explore how and why TV advertising continues to be such amazing value, even as some audiences cost more (and some less). We examine how our tele-diversity is continuing to diversify. And we look at how to maximise short-term advertising returns without sacrificing sustained growth – highly relevant at this time.

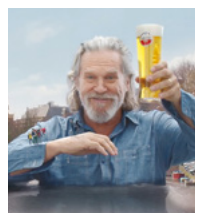
We also raise our eyes to look at the bright future of advanced TV advertising as TV becomes increasingly IP-delivered, not least in an interview with the commercial chiefs of the UK broadcasters. And we mark the imminent arrival of Thinkbox's major new online training course, built in collaboration with the ad industry. As businesses deal with unprecedented

uncertainty, it is worth drawing your attention also to something not in these pages. The Demand Generator is an online tool that can be found at [Thinkbox.tv/demandgenerator](http://Thinkbox.tv/demandgenerator). It was developed by Gain Theory, MediaCom and Wavemaker, based on a wealth of advertiser econometric data, to enable advertisers to determine the optimal media mix specific to their businesses and objectives. It can't guarantee certainty, but it does offer confidence based on evidence.

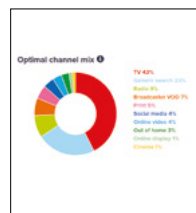
Please enjoy 'A Year in TV'. I hope you find it useful and insightful. A huge thank you to all those who contributed and helped make it happen. It was very much a collective effort, and that sort of thing has never been more important than now. ■

**Lindsey Clay** Chief Executive, Thinkbox

**23 Ad viewing time**  
In 2019, TV accounted for 93% of total ad viewing time.



**42 Optimising the media mix**  
Learn how to maximise business returns from your media investments.



**54 Future fit TV**  
TV's commercial chiefs on the direction we're headed in.



**76 TV planning's evolution**  
OMD's Vicky Fox on how to plan TV for the new decade.



# If you read one bit, read this

This publication is a feast. But, in case you only fancy the choicest nibble...



Porters, Dave

## The beauty of BVOD advertising

Imagine isolating the most compelling must-watch TV, with a wraparound of the most brand-focused, stylish advertising. That is the Broadcaster VOD commercial proposition in a nutshell: advertising around viewers' custom programme choices. As a direct result, the average view-through rate (that is, ads running for their duration while people are watching) is very high at 97%. (See page 21).

## TV creativity thrives

Creativity in advertising can be a bit like Marmite. One person's love is another's hate. Hopefully, though, we can all agree that the winners of The Thinkboxes awards are all creative wonders. Impactful, entertaining and surprising in equal measure. One of them was literally Marmite, in fact (see page 82).

## Don't get a false impression of YouTube and Facebook's reach

Ebiquity recently found that, for 16-24s, YouTube delivers impression-level reach of over 70%. However, when the definition of a view moves to 50% completion, this drops to below 30% and then beneath 20% for 100% completion. For Facebook, reach levels plummet to close to zero for both 50% and 100% completion. (See page 25).

## Advertisers need total TV planning

In 2019, £1 million planned 80/20 across linear TV got you 60% 1+ reach for 16-34s (it was 65% five years earlier), whilst £2 million got you 70% 1+ reach (compared with 80% five years earlier). While TV doesn't quite deliver the reach it did for 16-34s back when we lived in a linear monoculture, it's very close if you embrace all of TV. (See page 26).

## Wastage in TV advertising is a myth

Advertisers on TV only pay for the audience they buy; everything else – all those viewers outside that audience who also see the ad – is extra, so not a penny is wasted. It is the reverse story for online advertising, where advertisers must pay for every view their ad gets, whether or not they are the desired audience. (See page 38).

## Some forms of advertising are riskier than others

'Demand Generation' by Gain Theory, MediaCom and Wavemaker found that the variability of returns differs significantly across different forms of advertising. Linear TV advertising and BVOD are the least risky forms of advertising, delivering just 20% of variance compared with the median return. By comparison, online display, cinema, social media and print advertising all have a variability of +/- 60% compared with the median return. (See page 42). ■

# What did the industry watch in 2019?



**JO SUTHERLAND**  
CARAT

**What was your favourite TV moment of 2019?**

When Alex Brooker completed his channel swim on Channel 4's Sink or Swim for Stand Up to Cancer. My entire household was on its feet cheering him to shore. I challenge anyone who managed to watch that with a dry eye.

**What is your TV guilty pleasure?**

The Great British Bake Off! Whether we are watching or recreating in the kitchen, this show brings sheer delight to my family. I have three baking-mad girls and so this is a must-watch for the Sutherland clan!

**Best TV discovery in 2019?**

I'm a bit late to the party on this one, but it has to be The Young Offenders. I ought to hate two young scallies, their gross attitudes and behaviour, but it is just brilliant. Very funny and brilliant escapism.

**Who is your favourite TV hero or villain?**

I'm going with hero which takes me to one clear winner – Sir David Attenborough, the man, the legend, the eco-superhero. Just when you thought it wasn't possible to respect Sir David any more, he went and delivered that awe-inspiring speech on ITV News – and to top it all he is 93.

- 1 Brooklyn Nine-Nine, E4
- 2 Sink or Swim for Stand Up To Cancer, Channel 4



**NATALIE CUMMINS**  
ZENITH

**What was your favourite TV moment of 2019?**

Line of Duty finale! And a close second, probably Amy and Curtis' break-up on Love Island.

“ It ticks all the boxes for quality family entertainment. ”



**What TV can you not miss live?**

For three weeks of every year we take immense pleasure from the displeasure of 10 celebs. I'm A Celebrity... Get Me Out Of Here! ticks all of the boxes for quality family entertainment. We absolutely love it... although we did miss Holly W this year.

- 1 I'm a Celebrity... Get Me Out Of Here!, ITV
- 2 Love Island, ITV2

**What is your TV guilty pleasure?**

America's Next Top Model.

**Best TV discovery in 2019?**

Probably the whole Line of Duty property. I may never get to binge that well again. Otherwise, Brooklyn Nine-Nine.

**Who is your favourite TV hero or villain?**

Dot Cotton!

**What TV can you not miss live?**

Love Island.

“ I may never get to binge that well again. ”



**PAUL HUTCHISON**  
WAVEMAKER

**What was your favourite TV moment of 2019?**

Can I have five? Every episode of Chernobyl.

**What is your TV guilty pleasure?**

Flirty Dancing on Channel 4. This should be the biggest show on TV.

“ Favourite TV moment? Can I have five? ”

**Best TV discovery in 2019?**

The off button whilst watching West Ham on TV. Not good.

**Who is your favourite TV hero or villain?**

Walter White in Breaking Bad. But which is he?

**What TV can you not miss live?**

Sadly, West Ham. And F1. Lewis Hamilton has been incredible again this year, can't wait for next year's battle.



- 1 Succession, Sky Atlantic
- 2 Flirty Dancing, Channel 4
- 3 Formula 1, Sky Sports F1
- 4 Chernobyl, Sky Atlantic



**VERICA DJURDJEVIC**  
PHD

**What was your favourite TV moment of 2019?**

It has to be the Wimbledon Men's Final in July. Four hours and 57 minutes of nail-biting tension finally broken by a Djokovic victory.

**What is your TV guilty pleasure?**

Below Deck, which I have recently discovered. It covers the life and times of a luxury yacht crew in the Caribbean. Absolute genius.

**Best TV discovery in 2019?**

Succession. It's absolutely gripping and I'm still working my way through it on catch up.

**Who is your favourite TV hero or villain?**

Vic Mackey in The Shield has to be my favourite hero and villain. The perfect blend of a righteous, moral, corrupt and underhand character.

**What TV can you not miss live?**

Rugby and tennis have to be live. And soaps too, when I get home in time!

“ The perfect blend of a righteous, moral, corrupt and underhand character. ”





**ANA BALARIN**  
MOTHER

**What was your favourite TV moment of 2019?**

I believe season two of Fleabag was big enough to be classified as a 'moment'. Hands down the best entertainment of the year.

**What is your TV guilty pleasure?**

Modern Family and Grey's Anatomy. Don't tell anyone.

**Best TV discovery in 2019?**

What We Do in the Shadows. The ridiculous premise can take your mind off anything and the comedic timing is just sublime.

**Who is your favourite TV hero or villain?**

I took turns rooting for and despising the whole Roy clan from Succession, but Shiv Roy took the lead for her new power wardrobe alone.

**What TV can you not miss live?**

I wish I could stop for 30 seconds every morning to watch the handover from Good Morning Britain to Lorraine. It gave us a couple of the best comedy moments of the year.



**TREVOR ROBINSON**  
QUIET STORM

**What was your favourite TV moment of 2019?**

It has to be the Liverpool vs Tottenham Champions League Final, which I watched in a tiny pub in Madrid. From the first goal, there was a feeling of elation and happiness without a trace of animosity between rival fans. We were so caught up singing we barely saw the final whistle!

**What is your TV guilty pleasure?**

The Daily Show with Trevor Noah. His delivery is both funny and poignant, and I love his humanity and insight. The way he framed racism was particularly powerful, especially how American culture doesn't talk about it and the therapeutic effects of discussing racism without personally distancing yourself from it.

**Best TV discovery in 2019?**

I slipped into watching Killing Eve, having missed it the first time around. I fell in love with the characters - funny, stylish and complicated. They were all interesting manifestations and were



Succession, Sky Atlantic  
Lorraine, ITV  
Modern Family, Sky One

“The comedic timing is just sublime.”

incredibly absorbing. This was particularly true of the detective and the killer, it was fascinating to see what they wanted from each other.

**Who is your favourite TV hero or villain?**

Ivar The Boneless in Vikings. He is a completely captivating, fearless, psychotic, Viking king who thinks he's God. An out and out terrifying character, and like all the best villains, Ivar is dangerously watchable.

**What TV can you not miss live?**

Any Liverpool match has got to be watched live! Although my wife doesn't understand this concept and often asks me: "Can we go out and do something now? You can record it and watch it later." Anybody who likes football will be inwardly screaming at this notion.



**LIS BLAIR**  
EASYJET

**What was your favourite TV moment of 2019?**

Rolling right back to the beginning of the year, Luther. That moment on the night bus. Chilling.

**What is your TV guilty pleasure?**

The Great British Bake Off!

**Best TV discovery in 2019?**

Bit late to the party - Game of Thrones (I know, where have I been all this time?!).

**Who is your favourite TV hero or villain?**

Villanelle from Killing Eve. The perfect quirky combination of loveable evil.

**What TV can you not miss live?**

Last year, most of my TV watching has been almost entirely on catch up. With one notable exception - the Rugby World Cup Final. No chance I'd have been able to avoid the result otherwise!

“The perfect quirky combination of loveable evil.”



“He is both a hero or a villain depending on whether you agree with his point of view or not.”



**PAUL HIBBS**  
NATIONWIDE

**What was your favourite TV moment of 2019?**

Tough one, but it has to be Liverpool 4-0 Barcelona in the UEFA Champions League semi-final. An unbelievable night of drama and excitement.

**What is your TV guilty pleasure?**

I'm not even sure I've told my closest friends this, but I have a secret penchant for Take Me Out. Somehow it just works, but please don't ask me how!

**Best TV discovery in 2019?**

Really enjoyed A Confession on ITV. Great insight into a real-life story.

**Who is your favourite TV hero or villain?**

I'm sure I should be thinking of a fictitious character here but I'm going to plump for Piers Morgan. He is both a hero or a villain depending on whether you agree with his point of view or not. Never a dull moment on Good Morning Britain this year!

**What TV can you not miss live?**

It has to be the final round of The Masters at Augusta. Don't think I've missed one since Jack Nicklaus won his sixth Green Jacket in 1986. The back nine never fails to bring incredible drama.

A Confession, ITV

Take Me Out, ITV

The Great British Bake Off, Channel 4

Game Of Thrones, Sky Atlantic



# The year in numbers

# TV in the media world

How did your media usage change last year – mobile upgrade, bigger TV set, more podcasts or boxset bingeing? Before we dive into the details of the evolving audio-visual landscape, first let's review the overall media context in which TV and video sit. Here's the full picture for 2019.

**More media hours in the day**

The 2010s were the decade when smartphones became ubiquitous, allowing consumers to spend an extra 3 hours a day on media time, often concurrent with other activities. This growth was mostly driven by social media communication, from Snap to WhatsApp. Gaming also grew substantially, from 11 to 38 minutes a day per adult on average. *Fig. 1.*

**More TV in more forms**

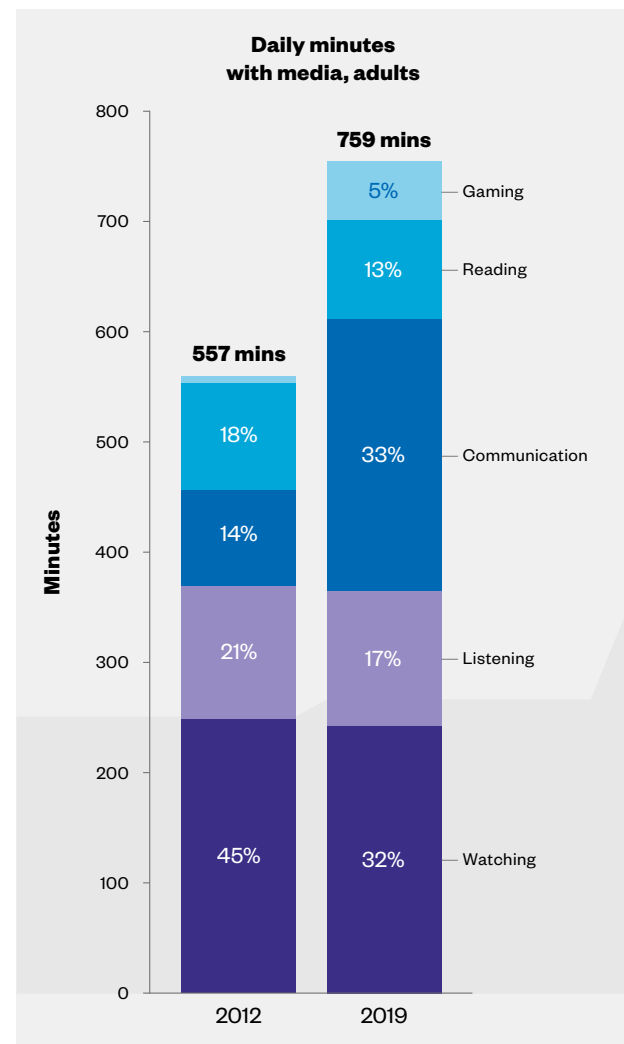
TV viewing has risen slightly in recent years, as its constituent elements (linear live, linear 'as-live', playback, catch-up, on demand, rental, PPV, buy and own, etc.) have multiplied. The monoculture of linear TV has been supplanted by tele-diversity, with BVOD/SVOD now accounting for nearly 20% of all video time according to IPA Touchpoints. *Fig. 2.*

**More commercial time in TV**

If we focus on commercial media (losing BBC, SVOD, WhatsApp, etc.), we can see size as measured by consumer time spent. Jumping out in red is TV, with the greatest share by some margin. This provides an interesting behavioural viewpoint, although only raw material in a planning sense, as the quality and effectiveness of each ad environment is not yet factored in. *Fig. 3.*

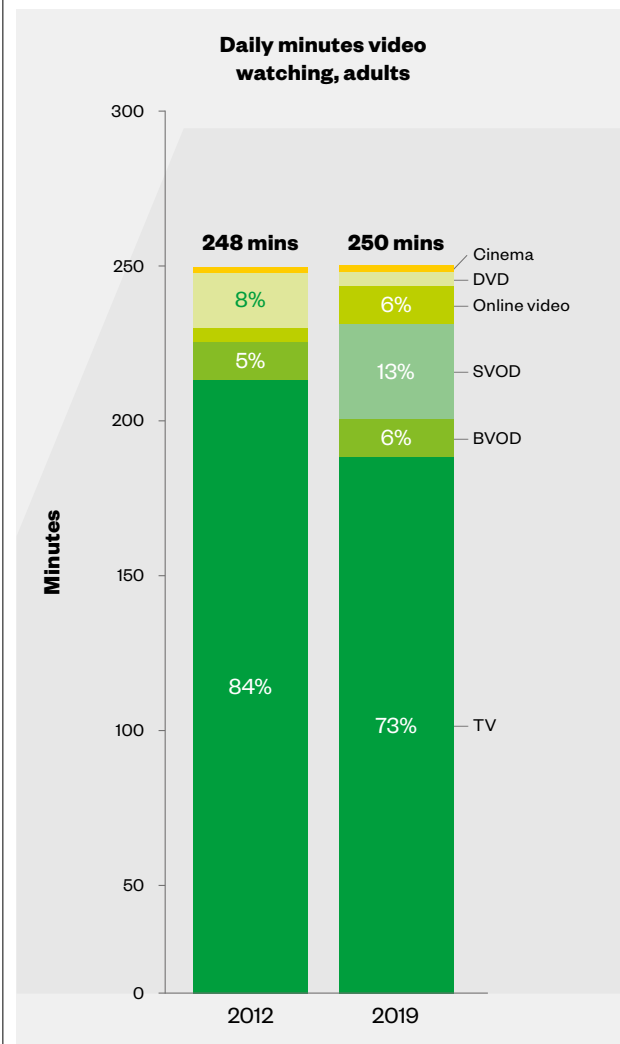
**Media minutes have grown**

Fig. 1



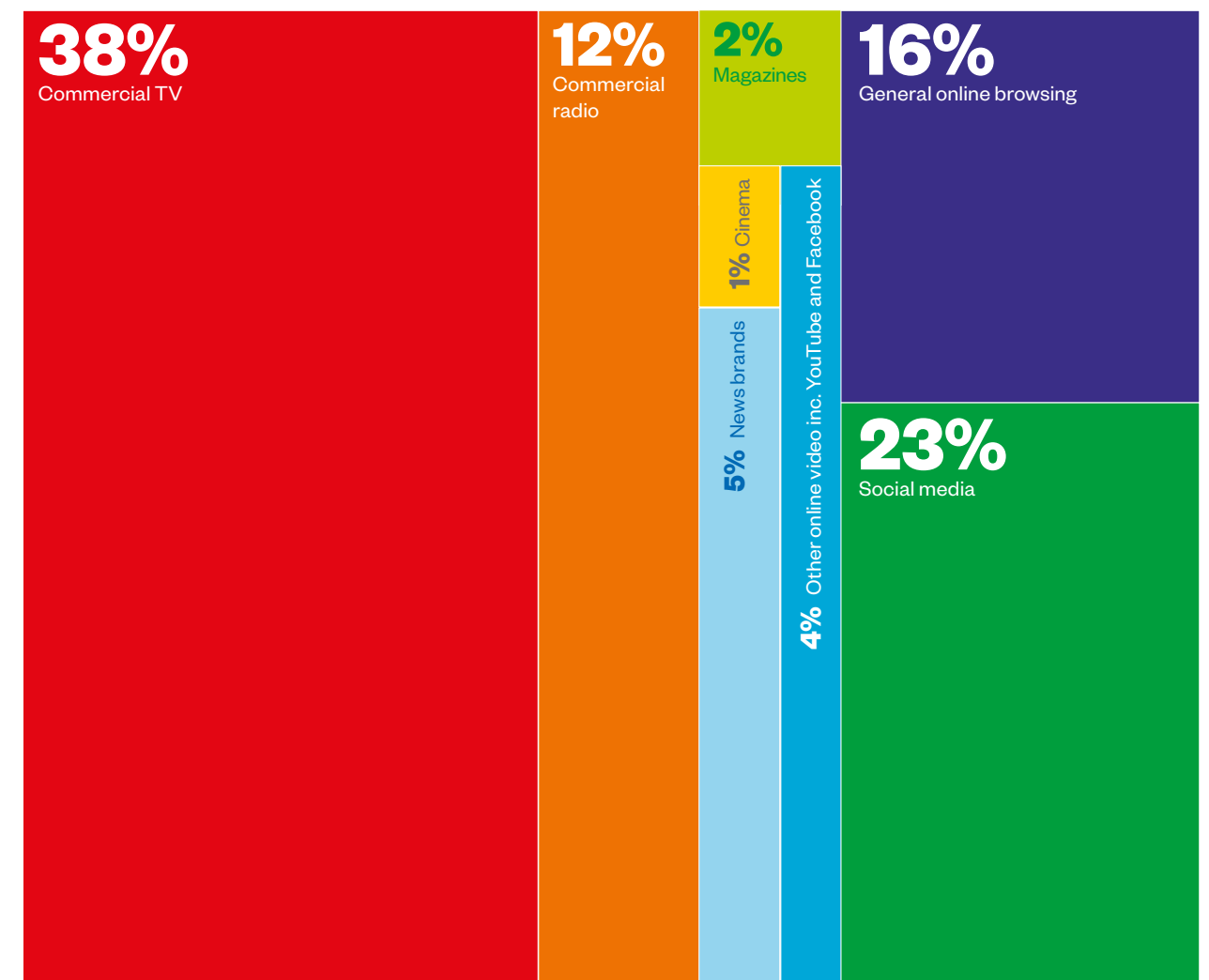
**TV is the most watched video**

Fig. 2



**Commercial media day – adults**

Fig. 3



Source: IPA Touchpoints 2012 & 2019

Source: Touchpoints 2019, IPA. Base: adults 15+. Includes only media which carries advertising and people choose to consume. TV, radio, newspaper & magazine figures include online/app consumption.

# The changing viewing landscape

As our TV viewing redistributes across linear and on-demand services, the world of TV – and TV advertising – is being remade. Here we take a look at some of the major themes.

## There has been more change in TV during the last 10 years than in the previous 50

The sheer quantity of quality TV to watch is one thing, but the way we watch it is another. TV has been transformed, whether that's TV the industry, TV the nation's favourite entertainment experience, or TV the advertising medium.

## Viewing behaviours are evolving as viewers embrace the variety, flexibility and control now available

Although linear TV remains the main way we watch programmes, SVOD services like Netflix and the broadcasters' own VOD services are the chief beneficiaries of viewer migration.

## Subscription VOD now accounts for just under 10% of all video viewing

SVOD went from zero take-up in 2010 to 60% of people having access in 2019. Connected TVs have had a similar trajectory, from fewer than 20% of households in 2010 to 80% in 2019.

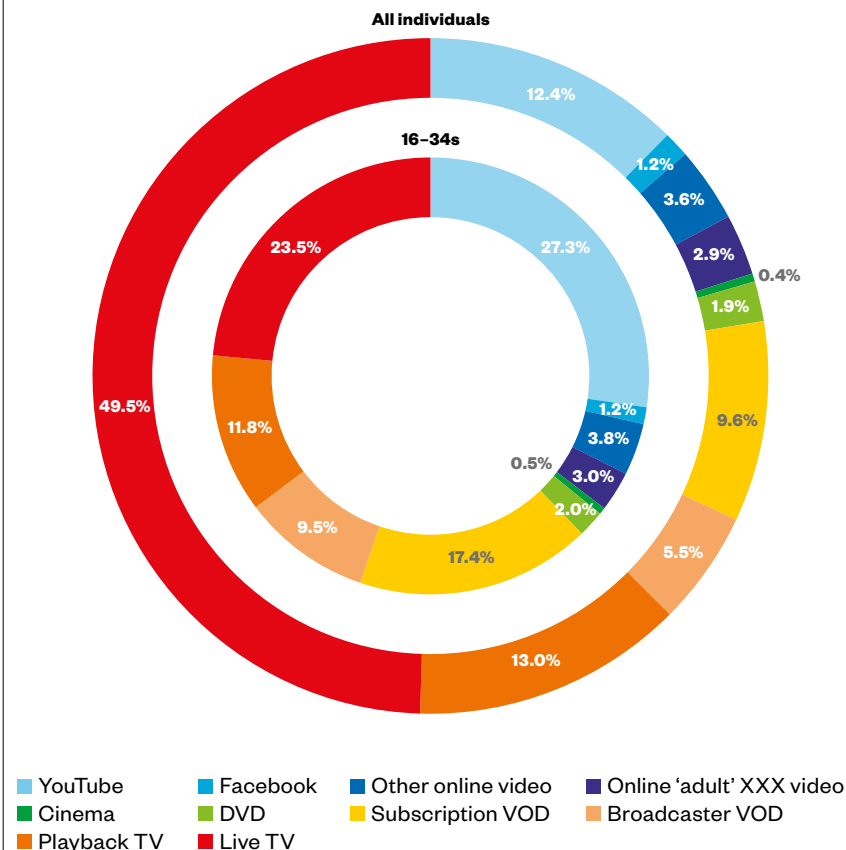
## Broadcaster VOD services too have soared

The ITV Hub now has over 30 million registered users, for example. All 4 has 22 million registered users whilst Sky has 9.5 million households connected to their VOD services. Meanwhile, YouTube – not TV as such, but relevant to TV's story – has also created a unique role for itself, being used for an average of 5 minutes a day in 2010 but rising to over 30 minutes a day in 2019.

## Broadcaster TV accounts for 68% of our video day

### Average video time per day

All individuals: 4hrs, 42 mins  
16-34s: 4hrs, 13 mins



Source: 2019, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2019 / Rentrak

## We watch as much TV as ever, but the way we watch has changed fundamentally

The pleasurable pastime of watching TV is as popular today as it was five, 10 or 15 years ago. Live takes the lion's share but viewing is being redistributed, as you can see to the right.

## Change has been more pronounced for younger audiences

The under 35s, and especially the under 25s, are most interested in and confident with new technology and devices. This is partly why they have been quickest to add SVOD, BVOD, online and mobile options to their TV repertoires alongside linear. They have also had greater motivation to do so for many reasons, including a love of fresh content – much of which has been created for them as a target audience – the social cachet of finding and sharing new TV shows, and the desire for a more flexible, lower-cost TV.

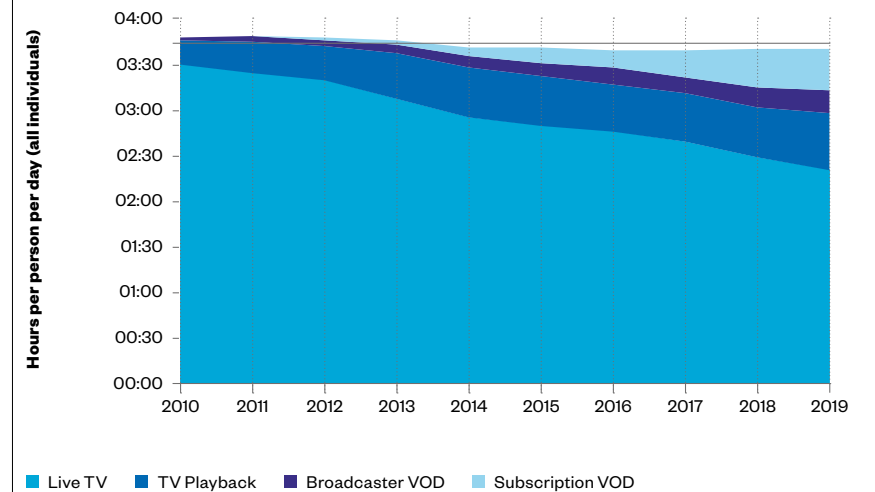
## Young people love TV and watch lots of it

BARB figures show that 92.4% of 16-34s watch commercial linear TV each month, 97.2% do so over three months, and 98.6% over six months. They are watching more selectively, but almost all are still watching plenty of it. Every brand can still target a 16-34 audience and reach millions of them within days on TV, and it is made even easier if BVOD is used on the campaign schedule.

## Broadcasters driving change

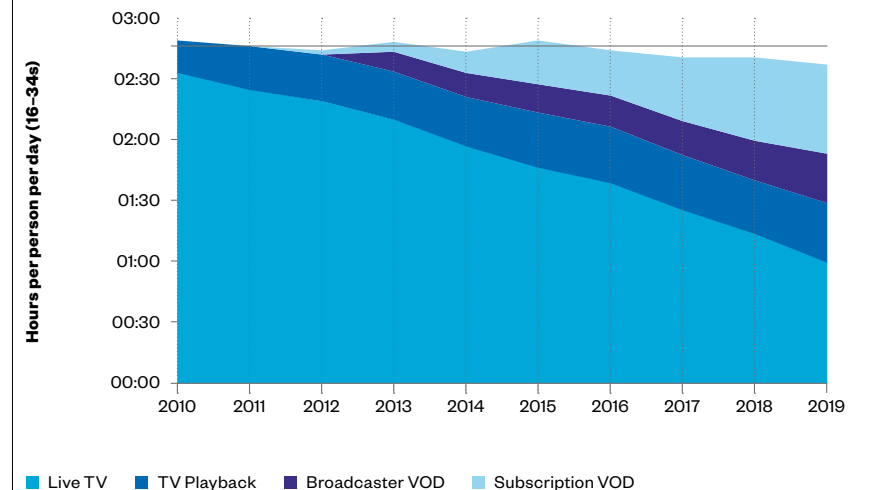
We shouldn't forget that the broadcasters themselves have actively driven these viewing changes through the launch of apps, hubs, and improved on-demand services and programmes. They have done so to meet the evolving needs of viewers and to secure a sustainable future. But equally, there is no disputing that SVOD, mostly in the form of Netflix, has been one of the most powerful disruptors of the broadcast landscape for decades. In the next section we assess the SVOD scene.

## TV viewing is changing (all individuals)



Source: 2010-2019, BARB / Broadcaster stream data / IPA Touchpoints 2019, Individuals

## Young people's viewing is increasingly spread across platforms



Source: 2010-2019, BARB / Broadcaster stream data / IPA Touchpoints 2019, 16-34



# SVOD goes mainstream

The global SVOD players Netflix and Amazon Prime Video are the biggest game-changers in UK broadcasting for a generation. There is a tendency to assume that any SVOD success comes at UK broadcasters' expense, but the story is far more nuanced.

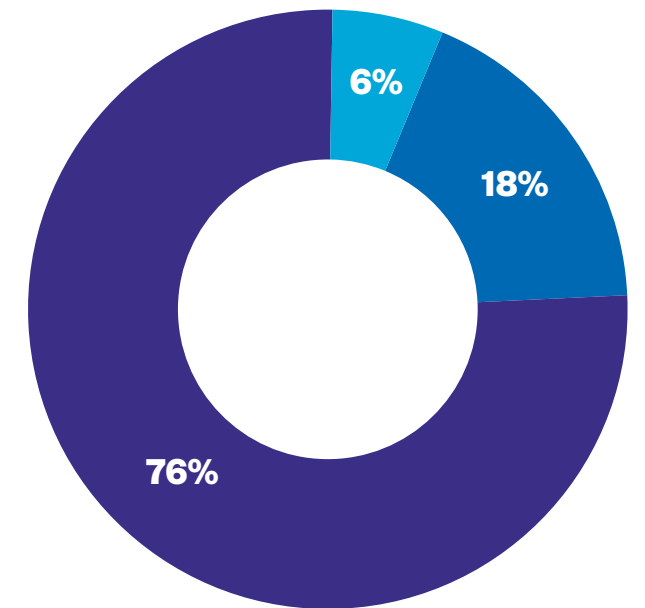
Whilst the SVODs have carved out a near 10% chunk of total viewing for themselves, they have also brought multiple positives to the UK TV market:

- Increased competition tends to raise everyone's game, inspiring content innovation, the taking of more risks, and better efforts to back formats that look like winners.
- The SVODs have kept younger viewers loyal to the TV viewing habit, rather than losing them to gaming or other activities.
- They offer exciting business opportunities for UK broadcasters: global content distribution windows (e.g. Bodyguard) and co-production opportunities (e.g. The End of the F\*\*\*ing World).
- They are also investing heavily in UK production in their own right, maintaining a buoyant indie sector and reinforcing the UK's world-renowned strengths in writing, acting, TV production, post-production and distribution.

## Overview of SVOD players

- **Netflix** is the leading SVOD by a wide margin, with widespread take-up and viewing. It has pumped billions of dollars into original content, in addition to extensive archive programming sub-licensed from broadcasters or production companies.
- **Amazon Prime Video** is also widely distributed but has significantly lower regular usage, due to many consumers having signed up for free Amazon Prime deliveries with no great compunction to watch the TV service. It offers volumes of TV and film titles, but with less original content than Netflix.
- **NOW TV** is a smaller player but significant as the leading British SVOD. Launched by Sky, it is designed to appeal to those who like variety but can't, or don't want to subscribe to a full pay-TV proposition.
- **BritBox** is the biggest streaming collection of British TV ever. Created by the BBC and ITV (and soon to be joined by Channel 4), it launched in the UK in November 2019. Currently it is a library of box sets, but there are plans to move into original programming this year.
- **Apple TV+** debuted globally in November 2019. It offers a limited selection of big star-fronted original programming, but does not have a library of licensed shows or movies. It also doesn't release full seasons of its shows all at once.
- **Disney+**, a new SVOD service from the world's biggest entertainment company, launched in the UK in March following its global roll out at the end of last year. It is home to Disney's vast catalogue of film and TV content, including Pixar, Marvel Universe and the Star Wars franchise.

## Netflix accounts for the lion's share of SVOD viewing



Source: Touchpoints 2019, adults 15+

### Netflix talks a good deal about subscriber numbers, but much less about volume of viewing

It is reluctant to release viewing information, although it does occasionally release a selective nugget or two. However, the TV viewing company Digital-i (www.digital-i.com) has developed a technique for estimating Netflix viewership through collecting passive viewing data from a sample of 1,000 households, representative of the UK. This has rapidly gained currency amongst TV production companies, broadcasters and others who really need to understand Netflix viewing patterns and trends. Using this data, here's some top-line insight into the world of Netflix viewing in the UK:

- Catalogue programming generates most of Netflix's viewing; 59% of Netflix streams are to licensed programmes and films vs. 41% of streams to Netflix original or exclusive programmes.
- Viewing is heavily skewed to US series and films, with 84% of streams to non-British programmes and films.
- Of the British programming viewed, 77% is licensed programming from the British broadcasters. The remaining 23% are Netflix originals.
- Three programmes account for over 10% of all Netflix streams: Friends, The Big Bang Theory & Brooklyn Nine-Nine.

“Increased competition tends to raise everyone's game, inspiring content innovation, the taking of more risks.”

## SVOD subscription by TV platform

|              | % of all homes | % with any SVOD service | % with Netflix | % with Amazon | % with NOW TV |
|--------------|----------------|-------------------------|----------------|---------------|---------------|
| Freeview     | 37%            | 44%                     | 37%            | 22%           | 6%            |
| Freesat      | 4%             | 50%                     | 40%            | 29%           | 4%            |
| YouView      | 9%             | 64%                     | 51%            | 32%           | 16%           |
| Virgin       | 11%            | 61%                     | 54%            | 31%           | 8%            |
| Sky          | 37%            | 59%                     | 51%            | 30%           | 4%            |
| NOW TV       | 2%             | 100%                    | 81%            | 58%           | 100%          |
| <b>Total</b> | <b>100%</b>    | <b>51%</b>              | <b>44%</b>     | <b>25%</b>    | <b>6%</b>     |

Source: BARB Establishment Survey Q4 2019, all respondents (adults 15+)

The table to the right uses the data from Digital-i for Netflix and data from BARB to make the best possible like-for-like comparison of the top programmes in terms of volume of viewing per household across 2019. The Netflix data is based on 'streams' which are defined by Digital-i as a start, whilst the BARB data is based on transmission 'views' which we've defined using BARB data as 1+ mins of continuous viewing. As device data from BARB wasn't available for the whole of 2019, this is TV set viewing within 28 days of original broadcast only.

This type of analysis tends to favour programmes with high volumes of new content, hence soaps, daytime shows, and long-running US sitcoms dominate the top 20. Friends is the only Netflix series to make the top 20 and the highest performing 'Netflix original' series is Stranger Things, which achieved just over 100 million streams, making it the 105th most viewed TV programme in the UK across 2019. This puts it in line with hits such as The Voice or First Dates.



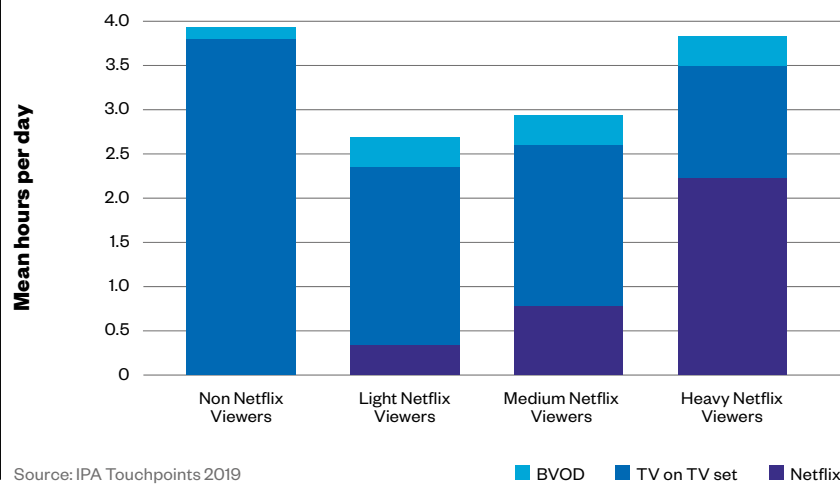
“ SVOD acts as an accompaniment to broadcaster TV rather than a replacement for it. ”

**Top 20 most-viewed TV programmes in the UK 2019**

| Rank | Viewing Source  | Programme                         | HH Views (m) |
|------|-----------------|-----------------------------------|--------------|
| 1    | ITV             | Emmerdale                         | 1,795        |
| 2    | ITV             | Coronation Street                 | 1,754        |
| 3    | BBC             | EastEnders                        | 1,046        |
| 4    | ITV             | The Chase                         | 910          |
| 5    | ITV             | Tipping Point                     | 874          |
| 6    | BBC             | Pointless                         | 841          |
| 7    | Channel 4       | The Big Bang Theory               | 737          |
| 8    | BBC             | Bargain Hunt                      | 700          |
| 9    | BBC             | Homes Under the Hammer            | 622          |
| 10   | Channel 4 / Sky | The Simpsons                      | 542          |
| 11   | BBC             | Escape to the Country             | 538          |
| 12   | Netflix         | Friends                           | 457          |
| 13   | Channel 4       | Hollyoaks                         | 448          |
| 14   | BBC             | Flog It!                          | 441          |
| 15   | BBC             | Antiques Road Trip                | 424          |
| 16   | Channel 5       | Neighbours                        | 413          |
| 17   | ITV             | Lorraine                          | 355          |
| 18   | BBC             | Countryfile                       | 355          |
| 19   | Channel 4       | Four in a Bed                     | 355          |
| 20   | ITV             | Family Guy                        | 346          |
| 29   | Netflix         | The Big Bang Theory               | 290          |
| 40   | Netflix         | Brooklyn Nine-Nine                | 242          |
| 92   | Netflix         | The Good Place                    | 112          |
| 105  | Netflix         | Stranger Things                   | 103          |
| 126  | Netflix         | Orange Is the New Black           | 88           |
| 127  | Netflix         | Glee                              | 87           |
| 142  | Netflix         | Riverdale                         | 80           |
| 148  | Netflix         | Suits                             | 77           |
| 149  | Netflix         | It's Always Sunny in Philadelphia | 77           |

Source for TV: BARB, one minute household reach. Source for Netflix: Digital-i, total stream 'starts'

**SVOD competes with broadcaster TV, but doesn't replace it**



Source: IPA Touchpoints 2019

Average streams/viewers per episode is perhaps a fairer way of determining the most popular series on TV across 2019. Again, using the same like-for-like measurement, to the right is a table of the top 20 series in the UK across 2019.

As you'd expect, the PSBs dominate a list like this and Netflix doesn't quite find a way into the top 20. After Life (with Ricky Gervais), which delivered an impressive 5.5m HH streams per episode, is their top show and sits just outside the top 20.

What this data shows is that SVOD isn't that different from the UK broadcasters. It offers another rich source of viewing pleasure, acting as an accompaniment to broadcaster TV rather than a replacement for it. This can be observed in pay TV homes for instance, which already have the widest selection of available TV content but in which SVOD take-up has always been rapid. There has never been a discernible replacement effect on a national scale either, (i.e. migration to SVOD at the expense of pay TV), though this will have happened on a home-by-home basis occasionally.

The graph to the bottom left from IPA Touchpoints shows the viewing splits of the lightest, middling and heaviest Netflix viewers. We all know people who claim to 'only' watch Netflix, or 'only' watch recorded or on-demand programmes for that matter, but media consumption data and anecdotal evidence reveals that such rigidly constrained viewing is vanishingly rare. In this case, the graph shows that even the group that watches Netflix the most also continues to enjoy many hours of linear TV a week.

This isn't unexpected: SVOD and linear serve different roles and purposes, the obvious distinction being that SVOD's forte is as an on-tap storage vault of drama, compared to linear TV's 'life happening now' narrative through news, sport and varied entertainment. One way or another linear TV plays a key role in our lives – even when we think it doesn't, or don't actively notice it.

As 2020 unfolds this will be a fascinating space to watch. Following BritBox's launch late last year and with Disney+ launching in the UK in March, this year we'll see the most valuable back catalogue content being taken back by the rights holders, and the streaming wars will have begun in earnest. ■

**Top 20 most-viewed TV programmes per episode in the UK 2019**

| Rank | Viewing Source | Programme                              | HH Views (000s) |
|------|----------------|----------------------------------------|-----------------|
| 1    | BBC            | Seven Worlds, One Planet               | 11,980          |
| 2    | Channel 4      | The Great British Bake Off             | 9,405           |
| 3    | BBC            | Strictly Come Dancing                  | 9,330           |
| 4    | BBC            | Line of Duty                           | 8,903           |
| 5    | ITV            | I'm A Celebrity... Get Me Out Of Here! | 8,631           |
| 6    | ITV            | Britain's Got Talent                   | 8,619           |
| 7    | ITV            | Dancing on Ice                         | 8,141           |
| 8    | BBC            | Michael McIntyre's Big Show            | 8,015           |
| 9    | ITV            | Cleaning Up                            | 7,489           |
| 10   | ITV            | Manhunt                                | 7,418           |
| 11   | BBC            | His Dark Materials                     | 7,334           |
| 12   | ITV            | The Bay                                | 7,325           |
| 13   | BBC            | Call the Midwife                       | 7,248           |
| 14   | ITV            | Vera                                   | 7,181           |
| 15   | BBC            | Luther                                 | 7,163           |
| 16   | ITV            | The X Factor: Celebrity                | 7,148           |
| 17   | BBC            | The Apprentice                         | 7,117           |
| 18   | BBC            | Death in Paradise                      | 6,902           |
| 19   | BBC            | Baptiste                               | 6,875           |
| 20   | BBC            | Doctor Who                             | 6,849           |

Source: BARB, one minute household reach; includes viewing to repeats broadcast within 28 days of first transmission; excludes device viewing. NB: Excludes 'one-off' programming, e.g. Gavin & Stacey Christmas Special, Eurovision, Comic Relief, etc.

**Top 10 most-viewed Netflix TV programmes per episode in the UK 2019**

| Rank | Programme                                        | HH Views (000s) |
|------|--------------------------------------------------|-----------------|
| 1    | After Life                                       | 5,528           |
| 2    | Stranger Things                                  | 5,263           |
| 3    | The Disappearance of Madeleine McCann            | 4,343           |
| 4    | Black Mirror                                     | 3,780           |
| 5    | Conversations with a Killer: The Ted Bundy Tapes | 3,447           |
| 6    | Sex Education                                    | 3,428           |
| 7    | The Umbrella Academy                             | 3,395           |
| 8    | Unbelievable                                     | 3,371           |
| 9    | Criminal: UK                                     | 3,311           |
| 10   | The Crown                                        | 2,904           |

Source: Digital-i - total stream 'starts' within 28 days of release.

# BVOD: it's in demand

Broadcaster VOD continues to be one of the most dynamic areas of TV. ITV, Channel 4, Sky and UKTV have each invested heavily in their BVOD services in the last year or so and viewers are responding in their droves.

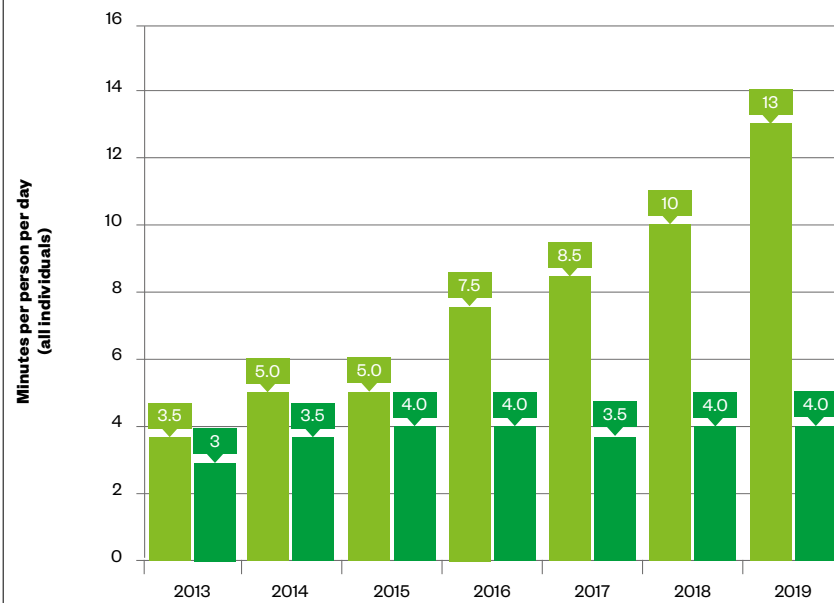
## 75% of BVOD viewing is on the TV set

The beauty of apps like Sky Go, ITV Hub, Demand 5, UKTV Player and All 4 is that you can watch on any screen device, personal or shared, anywhere. But when the TV set is the preferred BVOD screen (TV set BVOD viewing grew by 30% last year), the elements which make linear TV so successful apply equally to BVOD.

Aside from the technical superiority of so much TV equipment today, there are also the multiple social aspects which work their magic: home comforts and the companionable nature of shared viewing can truly enhance the viewing experience, as any episode of Gogglebox will testify.

“When the TV set is the preferred BVOD screen, the elements which make linear TV so successful apply equally to BVOD.”

## Broadcaster VOD viewed on TV sets grew by 30% in 2019



Source: UK broadcaster data 2013-2019, Individuals

■ TV set BVOD ■ Device BVOD

## BVOD's high value ad environment

Broadcaster VOD as an advertising medium is at the designer label end of the AV commercial spectrum. The editorial backdrop is picked by viewers themselves, so it is almost unimprovable in a sense, and when they have the choice they go up the rate-card: drama is clearly a favourite on-demand genre, being as sought-after in BVOD as it is in SVOD. BARB data for Sky On Demand and device VOD shows that drama is twice as popular on VOD compared to linear.

Conventional TV advertising works beautifully, so imagine then isolating only the most compelling must-watch content, with a wraparound of the most brand-focused, stylish advertising. That is the BVOD commercial proposition in a nutshell: advertising around viewers' custom programme choices. As a direct result, the average view-through rate (that is, ads running for their duration while people are watching) is very high (97%).

TV advertising has worked on the basis of scale for decades. Now, an era of precision targeting and data-informed campaigns is upon us. Broadcasters now have a wealth of first-party data through user registrations and pay TV subscriptions, and have invested heavily to provide advertisers with a whole new range of planning opportunities. There's more on BVOD on page 72. ■

■ The Great British Bake Off, Channel 4

## Viewing proportions by device

| % of all video time | Live/ streamed/ recorded TV 62.5% | BVOD catch up 5.5% | SVOD 9.6% | YouTube 12.4% | All other online video 7.7% |
|---------------------|-----------------------------------|--------------------|-----------|---------------|-----------------------------|
|                     | 99.1%                             | 72%                | 74.2%     | 23.3%         | 15.4%                       |
|                     | 0.4%                              | 12.3%              | 12.1%     | 29.7%         | 29.6%                       |
|                     | 0.3%                              | 10%                | 7.1%      | 11.5%         | 8.3%                        |
|                     | 0.2%                              | 5.7%               | 6.5%      | 35.5%         | 46.7%                       |

Source: Touchpoints 2019, IPA. All adults. 'Other device' not shown



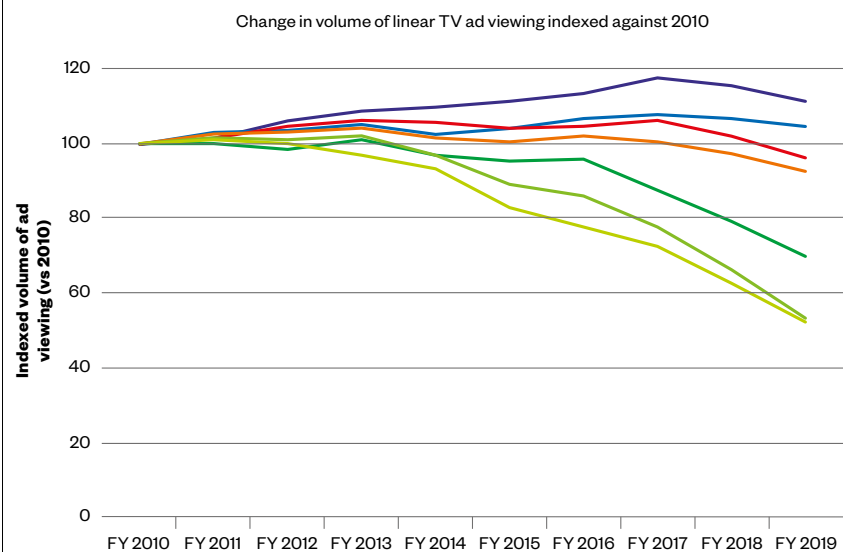
# The value of TV advertising

By the end of 2019, cost in TV had become a talking point, but TV's value, even with a higher price tag in places, is unquestionable. The fact is that there is no replacement for what TV advertising does. Luckily, though, TV still does what TV does.

## TV advertising is evolving

The headline for advertisers is that the redistribution of viewing from linear to VOD has resulted in declines in the number of TV ads viewed through linear TV. Crucially, though, this has been restricted to younger demographic groups. Older (and richer) audiences are watching pretty much the same number of TV ads they were 10 years ago.

## Indexed volume of linear TV ad viewing over time



— ABC1 Ads 35+ — ABC1 Adults — HP+CH — ABC1 Ads 16-34  
 — 35+ — Adults — 16-34s

Source: BARB; RCW commercial impacts

## Some TV audiences are cheaper now

Linear TV advertising is priced on a supply and demand basis, so changes in either affect the price paid by advertisers. With RPI outpacing TV investment (£10 in 2019 is equivalent to £13 in 2010 according to ONS RPI data, while linear TV spot revenues in 2019 are pretty much on a par with 2010) and TV's broad audience holding up, prices for audiences such as Adults and ABC1 Adults are, in fact, deflating. No one is complaining about that obviously (or really mentioning it at all).

## Some TV audiences cost more

However, with young audiences migrating to VOD at a faster rate than 35+ audiences, we've seen increases in the price for linear TV audiences such as 16-34s over the last few years. For advertisers, the frustration of supply-driven increases in the price of younger linear TV audiences is understandable.

But the uncomfortable reality for advertisers looking to target younger audiences through AV advertising is that there isn't a substitute for TV. TV advertising hasn't been replaced. Most of the viewing that has been lost from TV has moved to non-commercial, less-viewed or less-effective advertising environments. As a result TV continues to account for the vast majority of AV advertising time; 84% for 16-34s and rising to 93% for all individuals.

“ Prices for audiences such as Adults and ABC1 Adults are, in fact, deflating. ”

## Total TV average pricing over time (RPI adjusted)

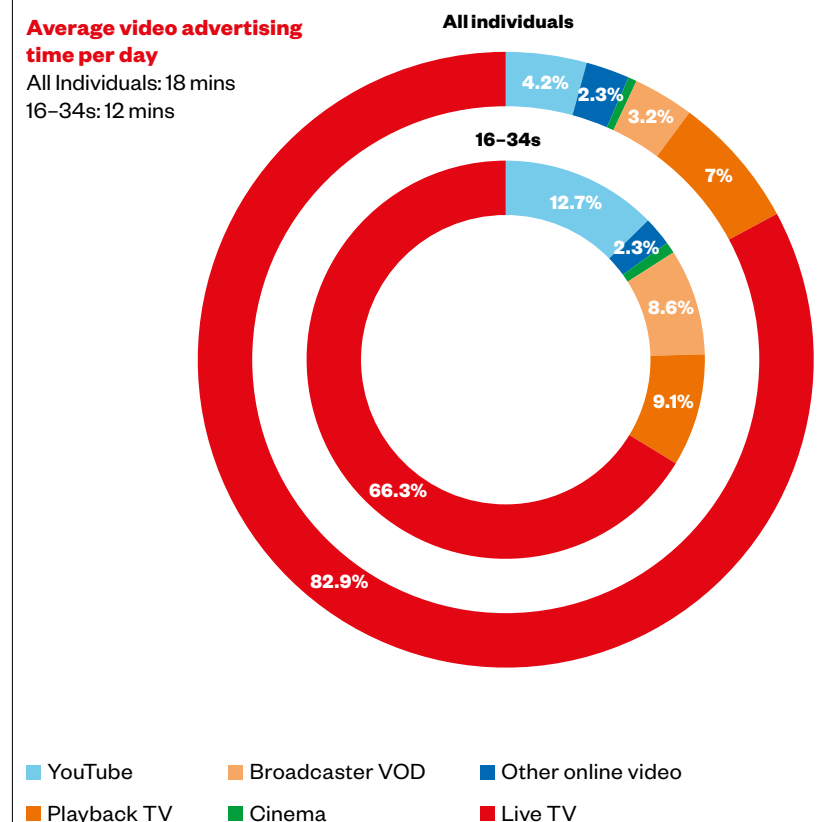


Source: BARB, AA/WARC – historic prices factored for RPI inflation – i.e. prices from 2010–2018 represent equivalent value in 2019 in-line with RPI inflation

## Broadcaster TV accounts for 93% of our video advertising day

### Average video advertising time per day

All Individuals: 18 mins  
 16-34s: 12 mins



Source: 2019, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2019 / Rentrak

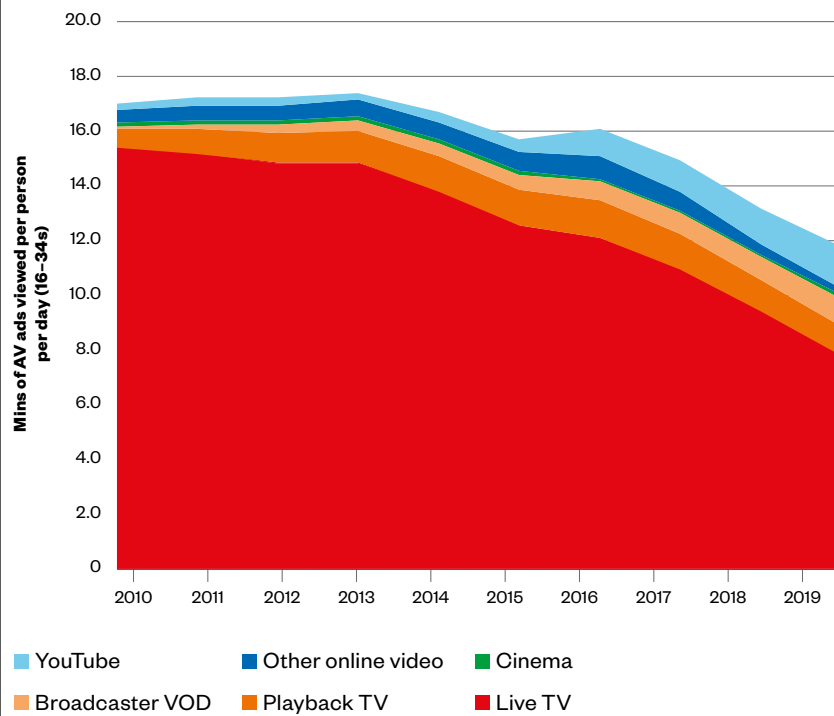
**Total video advertising time is declining**

TV is unrivalled in its ability to convert viewing of content to viewing of advertising. Broadcasters are unique in that their content is valued to the point where it's possible to interrupt it with advertising, without deterring audiences.

Online video competitors don't offer that same proposition – think of YouTube's skippable inventory or the ads glimpsed in a Facebook feed – and so total video ad viewing time is in decline, particularly for younger audiences.

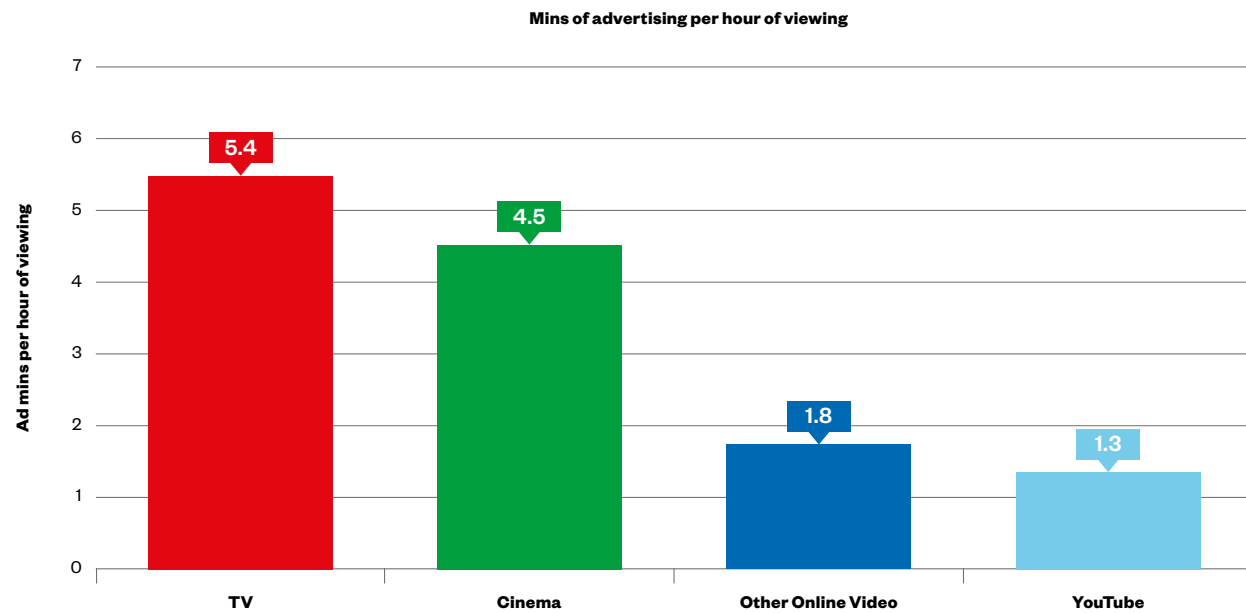
“TV is unrivalled in its ability to convert viewing of content to viewing of advertising.”

**Young audiences are watching less AV advertising as a whole**



Source: 2019, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2019 / Rentrak

**High-quality content is best at turning viewing to content into viewing to advertising**



Source: 2019, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2019 / Rentrak

**Don't get a false impression of YouTube and Facebook's reach**

Analysis from Ebiquity within their recent report, 'Mind the Gap', based on analysis of 15 campaigns from five separate advertisers, reveals the huge difference in impression level reach for Facebook and YouTube campaigns vs. 50% or 100% completion rates. The charts to the right, taken from this report, show that for 16-24s, YouTube delivers 'impression level reach' of over 70% – but when the definition of a view moves to 50% completion, this reach drops to less than 30%, and less than 20% for 100% completion. For Facebook, the reach levels drop to close to zero for both 50% and 100% completion.

**What should advertisers targeting young audiences do?**

First, don't assume because linear TV viewing is declining for 16-34s, that it's no longer a powerful destination to drive reach.

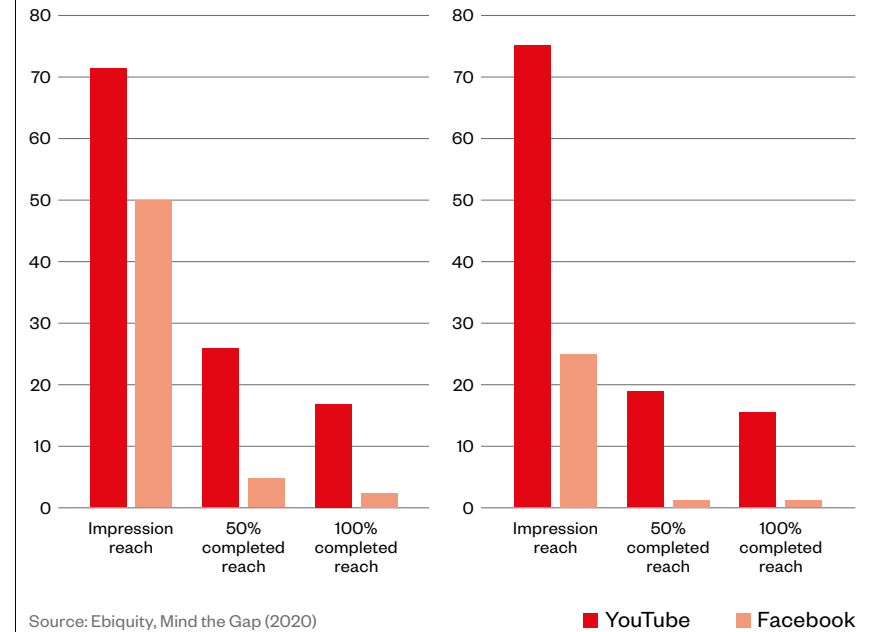
The analysis below right splits 16-34s into groups based on the number of ads they see on linear TV in a week. With almost 50% watching 50 or more linear TV ads in a week, it shows linear should very much be a principal means of driving fast, scaled reach of this audience.

“Linear TV should very much be a principal means of driving fast scaled reach of the 16-34 audience.”

**Comparing the delivery of YouTube and Facebook at impressions level, 50% completed reach and 100% completed reach**

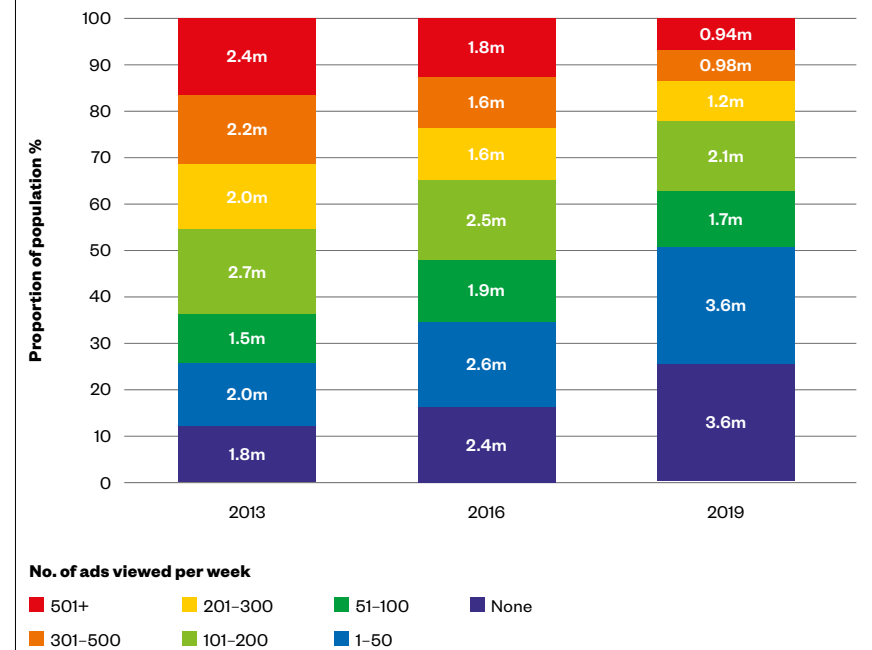
Younger focus advertisers – ads 16-24 % reach

Older focus advertisers – ads 35-44 % reach



Source: Ebiquity, Mind the Gap (2020)

**Almost 50% of 16-34s watch 50 or more linear TV ads a week**



Source: BARB, Adults 16-34. Ads viewed at normal speed (based on weeks 36 & 37 of each year)

If we look at the lightest half of 16-34 linear TV viewers – i.e. those who see fewer than 50 linear TV ads a week or no ads at all – and use the IPA's Touchpoints to analyse their viewing to Broadcaster VOD, it shows that BVOD is where we're much more likely to reach them. The odds of the average spot on linear TV reaching the lightest half of 16-34 TV viewers is 1 in 14. In BVOD it is just over 1 in 2. This is why we need to plan across both linear and BVOD in order to drive high levels of cost-effective reach.

**Advertisers need total TV planning**

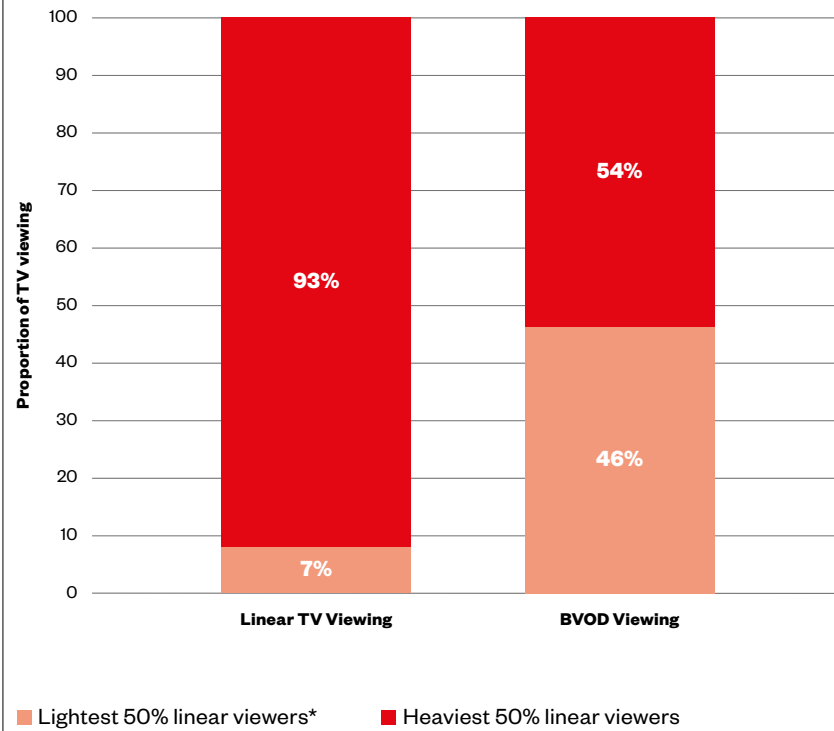
No advertiser bases their sales performance on just high-street sales; TV shouldn't be judged on the performance of linear alone. While TV doesn't quite deliver the reach that it did for 16-34s back in 2014, before the establishment of the SVOD players and the redistribution of our TV viewing, it's very close.

In 2019, £1 million planned 80/20 across linear TV got you 60% 1+ reach for 16-34s (it was 65% five years earlier), whilst £2 million got you 70% 1+ reach (compared with 80% five years earlier).

This means that there must be new TV planning fundamentals. For 16-34s, BVOD advertising is now cheaper than linear TV advertising, so for smaller budgets targeting 16-34s, advertisers should look at BVOD-only plans, or certainly start with BVOD. And, to maximise potential reach, BVOD campaigns should be planned over a longer period, i.e. two weeks before linear TV starts and continue for two weeks after. This is the best way of reducing frequency and reaching lighter viewers.

“ No advertiser bases their sales performance on just high street sales; TV shouldn't be judged on the performance of linear alone. ”

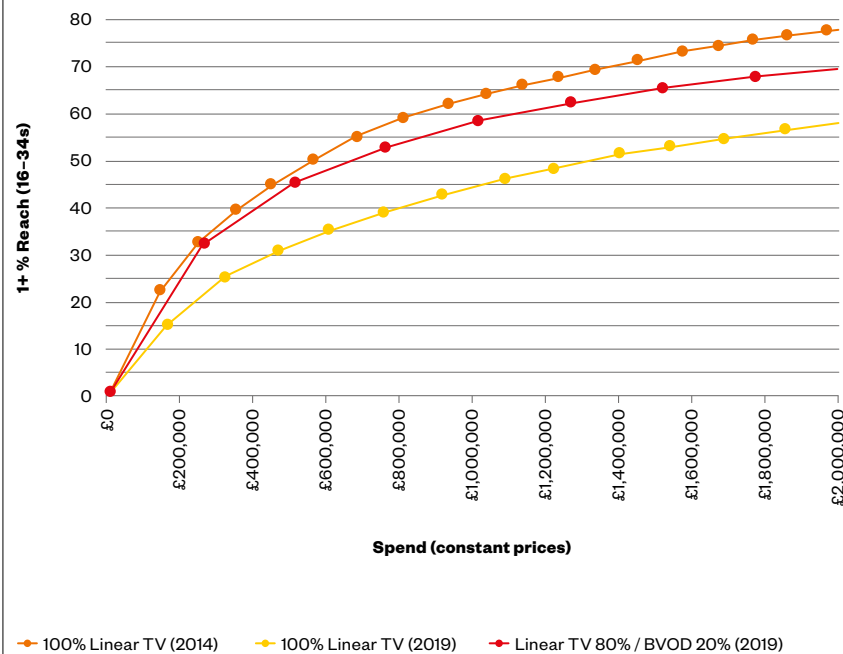
**Split of viewing between heavy and light linear TV viewers (16-34s)**



Source: IPA Touchpoints 2019, adults 16-34. \*'Lightest 50% linear viewers' includes non-linear viewers.

**Campaign reach delivered across a combined linear / BVOD plan**

16-34 cover guide



Source: BARB / K2 (Six weeks 34-39) / Touchpoints 2019 / Station average prices / Natural delivery

**Let's not focus solely on the youth**

Our industry spends a lot of time focusing on younger audiences, mainly because they have undergone the biggest changes in viewing behaviour. Whilst they are of totemic interest in general, and of crucial importance to some brands in economic and targeting terms, they are less significant to many national advertisers than ABC1 Adults, who hold the majority of expendable income.

As we showed earlier, the total volume of TV ad exposure to ABC1 Adults is relatively stable. The headline-grabbing rise of SVOD services like Netflix over the last 4 years has only had a small impact on the volume of TV ads seen. With total TV investment slightly lagging behind RPI, this audience's price is deflating with the station average CPT across all TV standing at £13, down from £16 in 2010.

However, this doesn't mean that cost-effective reach has remained stable. Some ABC1 viewers are also part of the 16-34 demographic. This younger half of ABC1 Adults has seen a decline in linear viewing (with viewing moving to VOD), whilst the older half's viewing has increased (partly due to an ageing population). To continue to drive the highest level of cost-effective reach, as with 16-34s, the solution is to plan across both linear TV and BVOD.

**BVOD's proven effectiveness**

It's clear that, in order to drive campaign reach, BVOD has now become a fundamental part of planning. And we can now also demonstrate the need for BVOD in terms of its effectiveness.

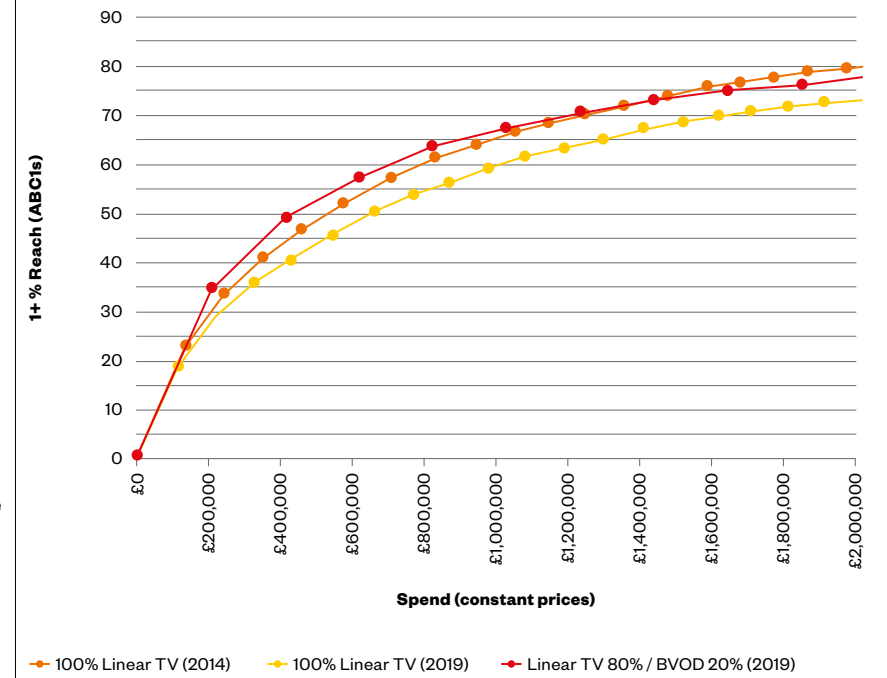
In December, Thinkbox launched the Demand Generator, a cross-media optimisation tool developed by Gain Theory, MediaCom and Wavemaker. It is based on an econometric analysis of £1.4 billion of media spend by 50 brands across 10 forms of advertising over 3 years. More details of the study can be found at [Thinkbox.tv/research](http://Thinkbox.tv/research). The Demand Generator provides a view on the optimal media mix for an advertiser based on the context of their business and budget.

The chart to the right uses criteria for a typical medium-sized advertiser and looks at the suggested optimal splits for linear TV and BVOD across the six categories within the study.

It shows that BVOD is not just a nice to have. It is now a need to have.

**Campaign reach delivered across a combined linear / BVOD plan**

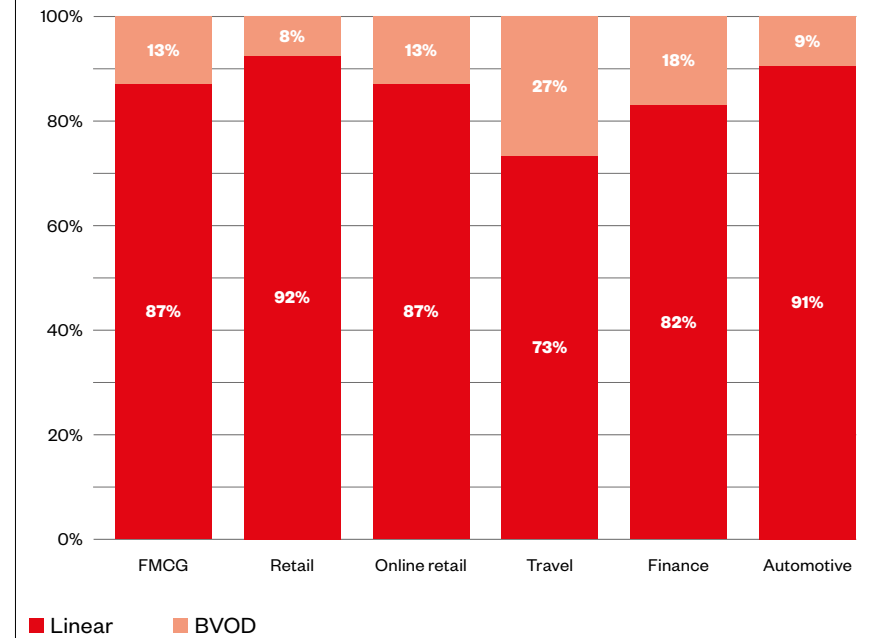
ABC1 cover guide



Source: BARB / K2 (Six weeks 34-39) / Touchpoints 2019 / Station average prices / Natural delivery

**Linear / BVOD optimal splits vary by category**

Optimal splits of TV investment between linear and BVOD by category



Source: 'The Demand Generator' Group M databank – criteria based on a 'typical' advertiser – for advertiser specific splits visit [Thinkbox.tv/demandgenerator](http://Thinkbox.tv/demandgenerator)

**TV advertising investment**

The headline for advertisers is that the redistribution of viewing from linear to VOD has resulted in declines in the number of TV ads viewed through linear TV. Crucially though, this has been restricted to younger demographic groups. Older (and richer) audiences are watching pretty much the same number of TV ads as they were 10 years ago.

2019 was completely overshadowed by the penultimate stages of the Brexit saga which led to the December general election. TV budgets are often among the first to suffer when business confidence drops, and it was at a nine-year low in 2018 when marketers were planning for 2019. The UK was due to leave the EU on 31st January, and then again on 31st October, with immense trading disruption expected each time.

With such volatile uncertainty throughout 2019 as a backdrop, TV's total ad revenue for the year of £4.93bn, down 3.5% on 2018, was a minor miracle of business resilience in the face of adversity. Most advertisers held their nerve, and even vove in some cases. Within the market the major influences were:

- A handful of large advertisers, impacted by the uncertainty of Brexit, significantly reduced marketing investment in TV. Five advertisers alone are responsible for a £100m decrease in TV investment.

- The self-imposed whistle-to-whistle ban of gambling ads within live sport resulted in a reduction in spend of just over £100m.

However, there were some strong performances within the TV market, for example:

- Online businesses were the biggest group of advertisers, accounting for £778m

- Amazon (the world's biggest advertiser) grew TV investment by 26% (+£16m)
- Deliveroo tripled its TV spend, +£11m
- Peloton grew from £2m to £10m
- Gocompare was up £7m, making it the second highest-spending comparison site (£20m vs Comparethemarket at £43m)
- Wayfair grew from £10m to £15m

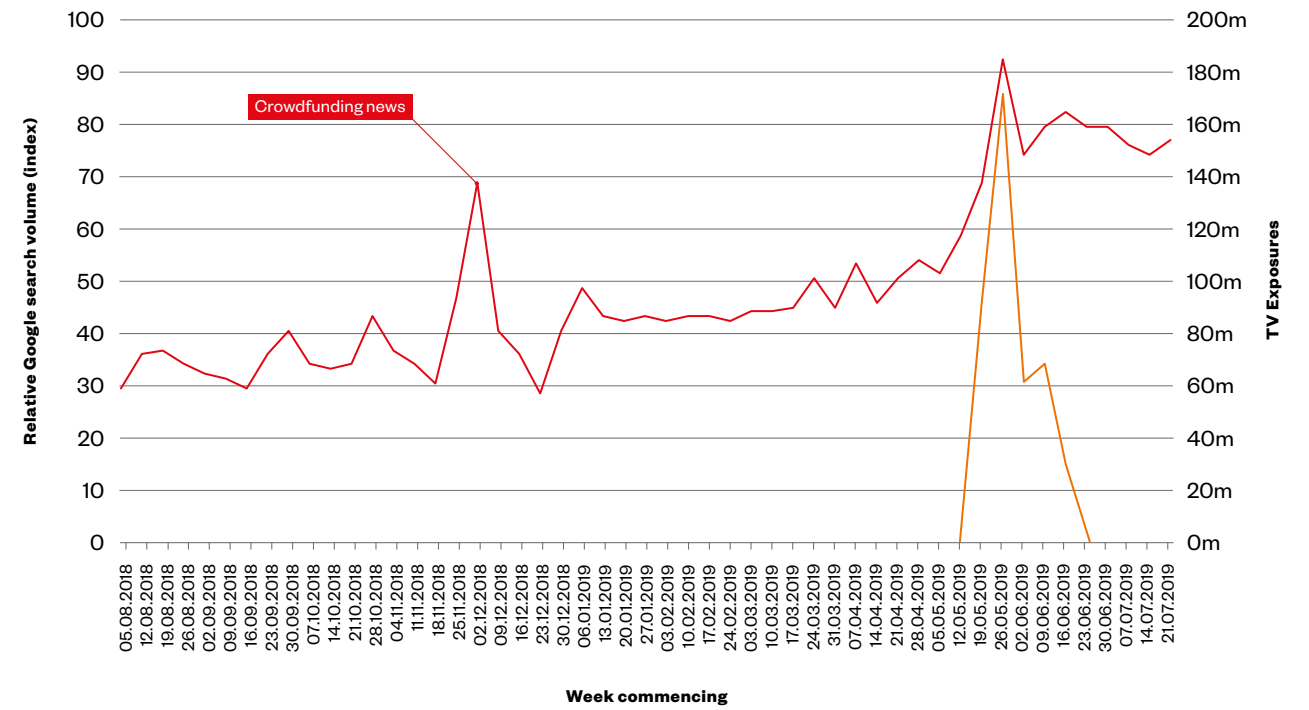
**There were 837 new to TV advertisers in 2019**

One notable example was new banking app Monzo, which invested £2m in its first TV campaign and reported 'insane growth' to Marketing Week as a direct result. The Google Trends analysis to the right shows the relationship between the TV campaign and a surge in brand search for Monzo. ■

Teen Titans Go!, Cartoon Network  
Sanditon, ITV



**Search for 'Monzo' increased by 60% across its first TV campaign**



Source: BARB / Google trends

— Search volume — TV exposures





# Insight



# A Matter of Time: understanding the short and long of TV advertising

This study demonstrated the distinct roles played by long and short TV ads within TV advertising. It found that longer ads are better at driving narrative, key message recall, memory of iconic imagery and positive brand perceptions. Shorter ads are supercharged when primed with a longer 'story-led' version. Both are needed as there is no cheap, one-size-fits-all silver bullet.

A consequence of the global tech giants joining the video world has been a shift towards shorter ads, sometimes fewer than five seconds. This is no bad thing in itself; short ads have an important role to play.

However, some advertisers considered cutting costs by creating just a single-length ad to work across all AV platforms. Agencies were asking Thinkbox about the impact of this strategy.

Here was an opportunity to demonstrate one of the unique environmental qualities offered by TV: the time it provides to tell a story.

## Tackling time length

The effects of ad time length are notoriously tough to research. This is because the impact of previous brand experience and exposure is incredibly difficult to extrapolate from the strength of the creative.

For example, a short ad might be hugely effective for a much-loved, recognisable brand with strong advertising heritage. But it may be significantly less impactful for a new brand building their proposition. Sixty seconds might work wonders for emotion-laden creative with a strong narrative. But it may fail to deliver for a brand with a weaker creative or an activation focus.

It's virtually impossible to isolate these elements from the length of the ad. Ideally, you would start from a base of zero with an entirely new bunch of brands, but the practicality of this makes it almost impossible, unless you create the brands yourselves, of course...

## Brand-new old brands

A Matter of Time was conducted in partnership with Work Research and Walnut, who devised a methodology that cleared the biggest hurdle facing this kind of research: existing consumer bias.

The researchers identified four existing creative treatments for brands that were unknown in the UK but sat within categories familiar to people within this country. These were retail, insurance, broadband and washing detergent. To represent the creative diversity of TV advertising in the UK, three ads were 'emotional' treatments and one was a typically 'rational' ad.

Next, a team of ad agency creatives at George & Dragon re-worked the ads, including the logos and straplines, to give them completely new brand identities.

By creating new brand identities, the bias of past marketing exposure and individual brand history was completely eliminated.

Next, where necessary, the team of creatives formed a set of cut-downs for each of the ads using the identical methods and processes that they use for their existing clientele. These cut-downs were then vetted by several different teams to ensure that creatively, they were cohesive and fair representations of the original ads and brand propositions. Time-lengths were categorised as follows:

- Long: 60"
- Medium: 30"
- Short: 10", 6" or 5"

The ads were now ready for field and were taken into an online test where each iteration was shown, buried amongst a reel of other TV ads, to 200 people.

## Explicit vs. implicit perceptions

Each ad was tested against two factors:

- Explicit perception statements: what people thought and consciously remembered about the 'brands'
- Implicit brand perceptions tests: what people felt about them or thought they just knew for themselves

The latter were tested via Implicit Reaction Testing (IRT). If someone truly believes or disbelieves something, their initial reaction tends to be strong and automatic. The more doubt they have, the slower the reaction time, as the brain must consciously consider what is being processed and this slows the response down.

In addition, around half of the respondents were tested again several days later to give an indication of the decay rate for the measured effects and the impact of repeat exposure.

“The bias of past marketing exposure and individual brand history was completely eliminated.”

## KEY FINDINGS

### Longer ads work even harder at an implicit level

Longer ads delivered a 42% uplift to explicit brand statements over short ones and were, unsurprisingly, better at delivering a greater volume of information.

Longer ads worked much harder at a subconscious level, where they almost doubled the implicit effects over shorter ads. Longer ads were better at shifting brand feeling and sentiment, which was remarkable given these brands were unknown to respondents beforehand. See top chart on the right.

### Longer ads act as memory 'anchors'

When a short ad was seen after a long ad (after a gap of several days), there was a 51% uplift in explicit memory effects versus just 9% for seeing a short ad alone.

Our brains like order. Without it, they try to create it by plugging gaps. 'Reconstructive memory' enables us to fill in the blanks and make sense of things.

In marketing terms, longer ads acted as memory 'anchors', leaving fewer gaps to fill and reducing the need for reconstructive memory.

### Longer ads enhance image memory

Our brains store snapshots of events, so iconic brand imagery is crucial to advertisers.

The same iconic imagery was included in both longer and shorter ads, for a similar duration, but memory of key scenes in the longer ads was 37% higher than the shorter ads. See middle chart on the right.

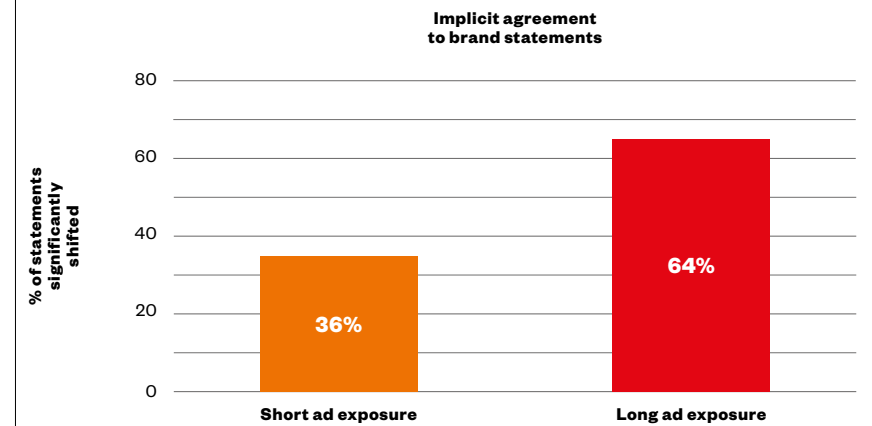
### Brand awareness decays faster than perception

The metrics most commonly tracked as indicators of brand health – spontaneous and prompted brand awareness – decay much faster than brand perception measures: 87% and 83% decay respectively several days after the first exposure. This compared with 20% decay for implicit and 18% for explicit perceptions.

Implicit memory of ad imagery also decayed much more slowly than brand perceptions. People remembered the key messages, feelings and visuals of the ad over the brand name, which highlights the importance of emotional storytelling within TV creative. See bottom chart on the right.

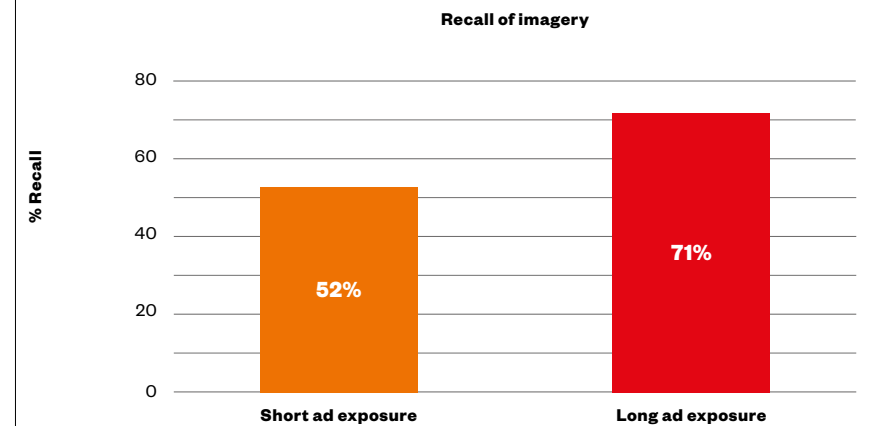
Read more and download the slides at [Thinkbox.tv/research](http://Thinkbox.tv/research).

## Longer ads work even harder at an implicit level



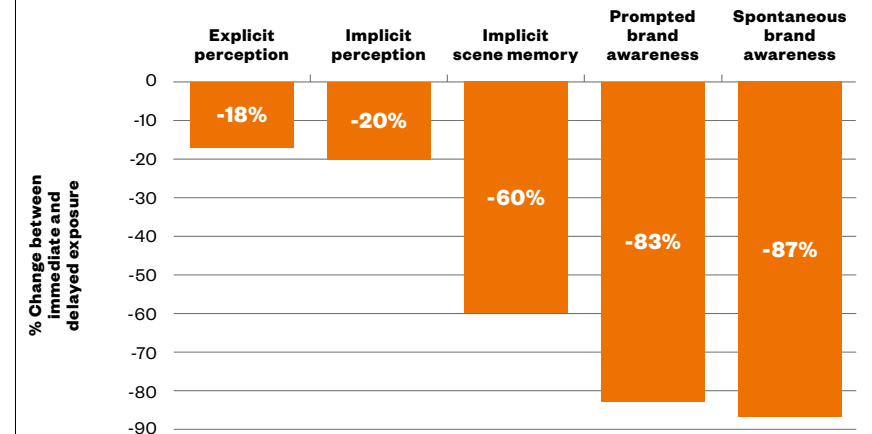
Source: A Matter of Time, 2019, Work / Walnut / Thinkbox. Based on 3 brands (3 x short ad; 3 x long ad)

## Same imagery, similar duration, different levels of recall



Source: A Matter of Time, 2019, Work / Walnut / Thinkbox. Based on 3 brands (3 x short ad; 3 x long ad)

## Awareness decays faster than perception



Source: A Matter of Time, 2019, Work / Walnut / Thinkbox. Based on 4 brands. Delay was 3-5 days post-exposure.

# As Seen on TV: how TV supercharges small businesses

TV is transforming. Not just how we watch or the advanced advertising opportunities it now offers, but also the ever-increasing number of smaller advertisers who make up almost £5 billion of annual investment. This study reveals the power of TV for smaller businesses.

Advertising in the UK has changed. As financial uncertainty and technological capacity has increased, new business models have evolved and the shape of TV investment has changed.

In 2019, online businesses accounted for over £778 million in the UK and a significant proportion of that came from smaller advertisers looking to generate brand awareness and affinity – a task perfectly suited to TV.

Yet many potential advertisers overlook TV. They may not watch much TV, they may view it as overly complicated and, if their business lives online, they may intuitively believe that using only online media is the route to success.

The reality is that search, online display and social are all fantastic entry points for new, smaller businesses, but their ability to drive growth is limited. This study demonstrates the role TV can play in supercharging small businesses.

“ In 2019, online businesses accounted for over £778 million of total TV ad revenue in the UK and a significant proportion of that came from smaller advertisers. ”

### A two-pronged approach

— The study featured qualitative interviews with small advertisers, media agencies and broadcasters conducted by Work Research. It was designed to identify the barriers to TV and the point at which TV becomes a viable advertising option for smaller businesses. It also offered direction on the right approach to take.

The study also included econometric analysis of 78 brands and 300+ campaigns for smaller advertisers conducted by Data2Decisions to:

- Highlight the principles smaller businesses need to consider when it comes to advertising effectiveness
- Provide guidance on the relative roles of different media channels for driving growth
- Offer advice on the best TV strategies
- Provide benchmarks for the impact that TV advertising has on sales

### KEY FINDINGS

**There are four main triggers that signal an advertiser is ready to move into TV:**

- 1) The point where existing campaigns fail to elicit the same effects for the same investment
- 2) The need to scale the business up and create a new demand pool
- 3) The ambition to build a brand and generate brand awareness
- 4) The belief in AV advertising as a way of driving reach and building a connection with customers.

**Scale is the biggest driver of effectiveness**

Small businesses should prioritise growth over profit – it's the growth that drives the profit. Interestingly, ad-driven growth is easier to achieve for smaller businesses starting from a low base who have a large untapped market of non-buyers to convert. See chart on the right.

**Advertising has both a short-term and a sustained effect on sales**

Advertising has an immediate effect on sales, but it will also work long after the campaign has ended through driving repeat business and resonating with customers who weren't in market at the time of the campaign.

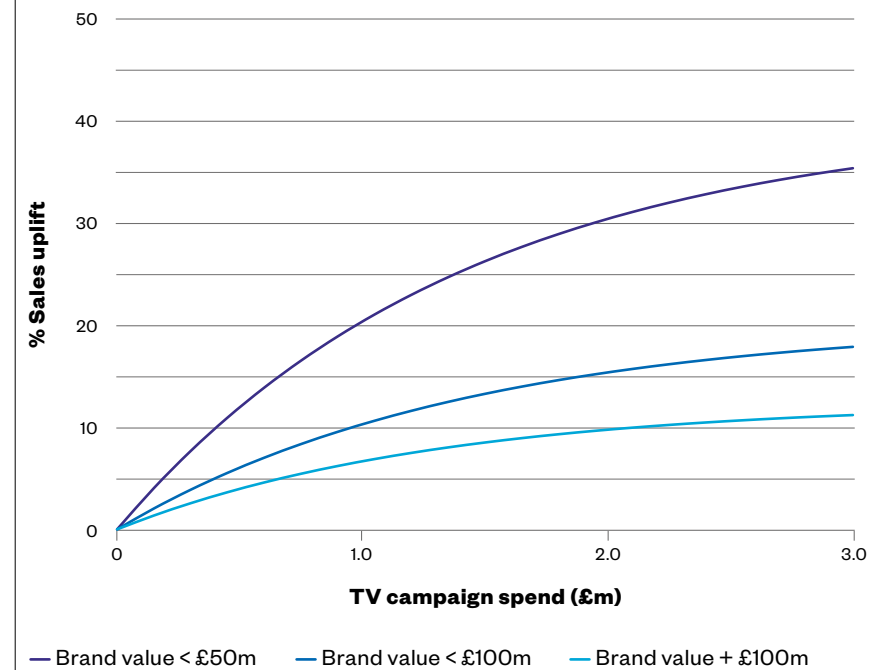
**TV creates the majority of ad-generated sales**

Out of the 78 small brands analysed by Data2Decisions, 66% of total spend was allocated to TV, but it returned 80% of all ad-generated sales.

Wheeler Dealers, Discovery

### Smaller brands see the biggest uplifts in sales

- TV efficiently creates sales uplifts even at low levels of investment
- For a small brand with <£50m brand value a £0.5m TV campaign can drive sales by 10%



Source: 'As Seen on TV: supercharging your small business', May 2019, Data2Decisions / Work / Thinkbox Data2Decisions database of smaller brands. All categories.



KEY FINDINGS

**TV delivers after other demand-generating channels have saturated**  
Some channels are effective at low levels of spend (such as search, CRM, display, and affiliate marketing), but they quickly saturate and stop delivering. TV's share of ad spend will be lower when total spends are lower (c. 50% of a total advertising budget of £100k), but Data2Decisions recommend that TV's share of the budget should increase as total budgets increase. This is because diminishing returns on TV occur at much higher spend levels than for other channels. See chart below.

**TV is best used for brand awareness first before activation**  
Smaller businesses should use TV advertising for brand awareness to begin with, rather than for activation. TV's activation effects typically improve by c. 14% when they follow a brand awareness campaign.

“  
Diminishing returns on TV occur at much higher spend levels than for other channels.  
”

**Seasonal changes offer significant advantages**

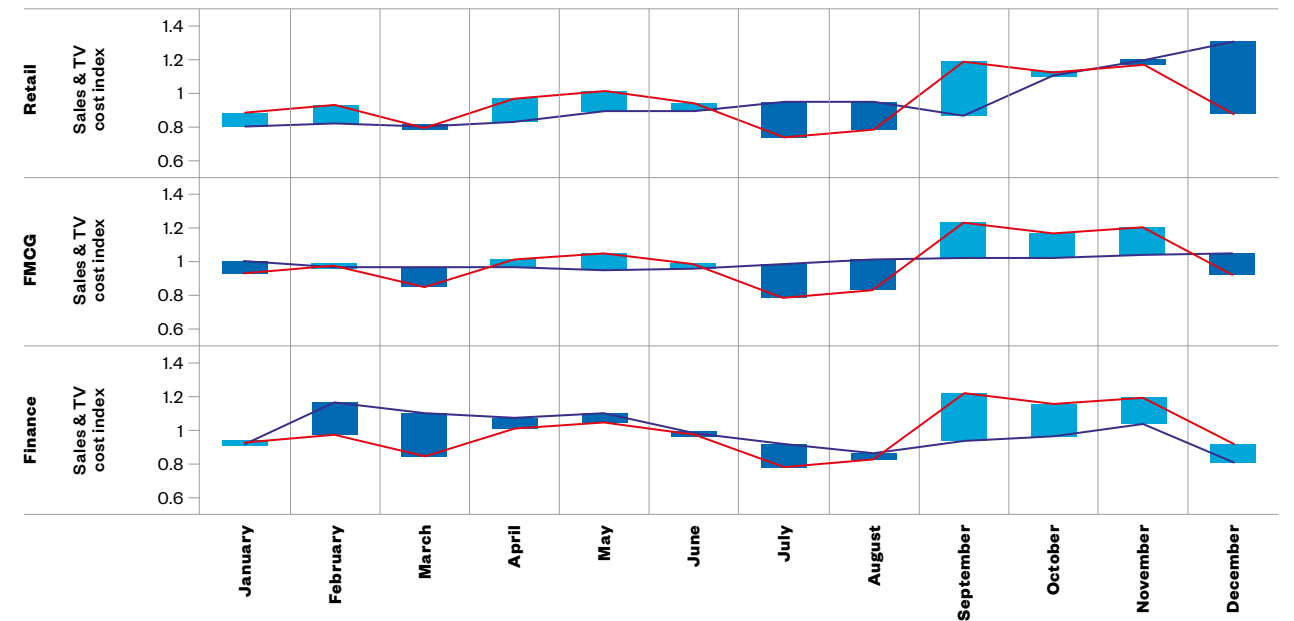
Different categories should use different windows of opportunity within TV to take advantage of seasonal variation in TV pricing and seasonal sales effects. For example, the optimal months for FMCG are typically July/August, for retail it is December, and for finance it is February/March. See chart right.

**A 'burst' strategy is preferable to a 'drip'**

To fully take advantage of the seasonal effect, advertisers should start with a 'burst' campaign at the most efficient time of year (rather than more smaller campaigns spread over a longer time period). As smaller businesses grow, Data2Decisions' analysis showed that they should move from occasional bursts to a more continued TV presence throughout the year.

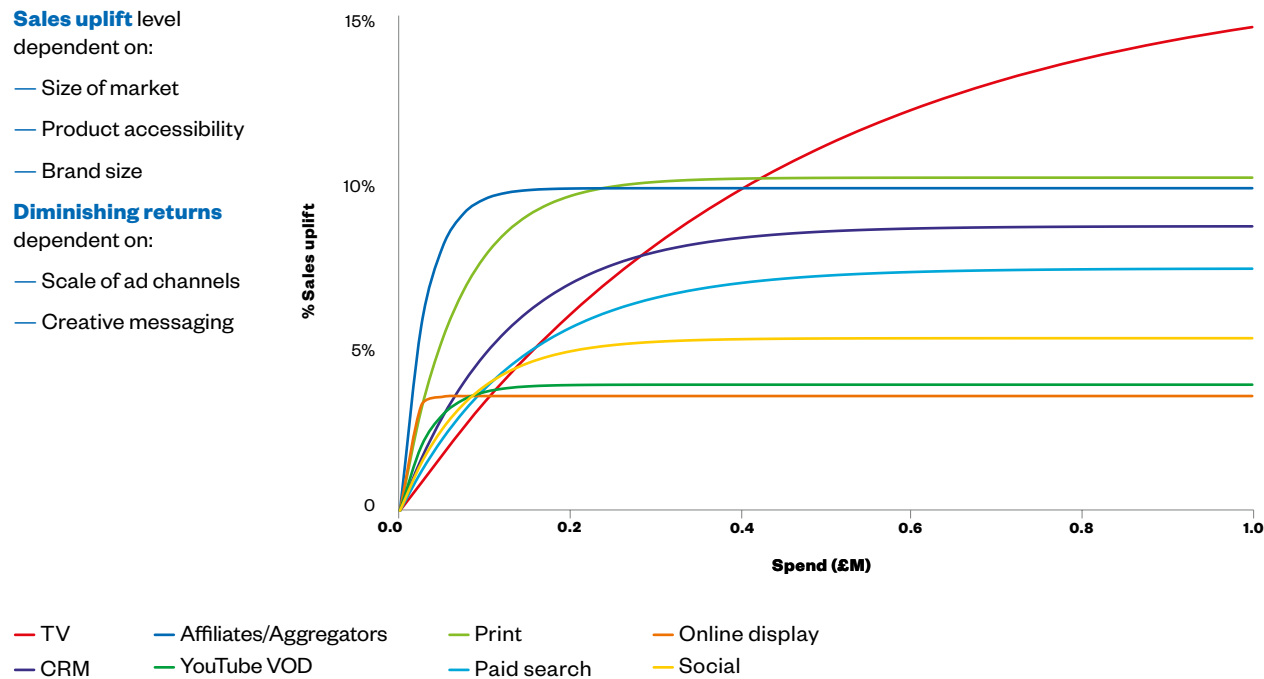
Read more and download the slides at [Thinkbox.tv/research](http://Thinkbox.tv/research).

**Take advantage of seasonal peaks & cheaper TV periods**



Source: 'As Seen on TV: supercharging your small business', May 2019, Data2Decisions / Work / Thinkbox. Data2Decisions database of smaller brands

**TV drives more sales than any other media at higher levels of investment**



Source: 'As Seen on TV: supercharging your small business', May 2019, Data2Decisions / Thinkbox. Data2Decisions database of smaller brands. Example from finance category

**Recommendations for smaller advertisers**

**Recognise the signals in the numbers**

Work with your media agency to create your own diminishing returns curves. If you are hitting diminishing returns, it's time to consider moving into media which generate new demand, such as TV.

**Adopt a growth mindset**

Moving to the next phase of advertising-driven growth requires a better understanding of how advertising works. Get familiar with the essential reading in this area: How Brands Grow by Byron Sharp, and The Long and the Short of It by Les Binet and Peter Field.

**Have a clear position and proposition**

As you move beyond demand-harvesting channels, it's vital to have a clear proposition and position within your market. If you have this already, move forwards. If not, ensure that

you understand where you sit within your potential market, what makes you distinctive and what it is that you want to communicate within your messaging before you progress.

**There are deals to be done**

Explore your options with media agencies, creative agencies and media owners. There are always deals to be done for new advertisers and plenty of support on offer.

**Dive into the detail**

Use the insight available to you to plan your campaign. Factor in seasonality, time of day, day of week, target audience, content, context and anything else you can think of. These are the dials that optimise your plan.

**Prepare for fast effects**

The impact from TV can be profound. Make sure your servers are ready for an increased volume of web traffic and that you have the means to physically deliver the extra orders you take. Make sure you have a measurement framework in place prior to your campaign and know exactly what it is you need to measure, e.g. attribution, awareness, brand sentiment, etc. Test and learn.

**Think about measurement upfront**

Nobody can predict the exact effect of going on to TV for the first time. Use attribution software to help you learn what variables trigger your brand responses and use this to adjust your campaign. However, don't ignore the bigger picture; look at the consistencies in variables that trigger a response as opposed to chasing a narrow set of parameters.

# The great wastage illusion



**Matt Hill**  
Research & Planning Director, Thinkbox

Wastage in TV advertising is a myth. Advertisers on TV only ever pay for the audience they buy; everything else is extra. Not a penny wasted. It is the reverse story for online advertising, explains Thinkbox's **Matt Hill**.

In 2019, I wrote an article for Campaign with the title "Exposing the black hole of online video advertising". When we included it in the Thinkbox email newsletter, a proof-reading error led to it being promoted as "Online video's back hole". It got an eye-wateringly high click-through rate. I may now have to write one on that topic.

That aside, the black hole piece I did actually write looked at how expensive online video advertising is relative to the cost of TV advertising. And that's before we look at the different quality and value of the two.

Using 2018 data, the maths was as follows:

- TV (incl. BVOD) accounts for 95% of video advertising time. Online video like YouTube, Facebook and the long programmatic tail together account for 4%. Cinema is the remaining 1%.
- In time terms, this means the average person watches 17.5 minutes of TV

“  
Online video costs advertisers seven times more than TV. This doesn't sound like value for money.  
”

advertising a day (the 95%) and one minute of non-broadcaster online video advertising (the 4%).

- 2018's Advertising Association/WARC ad spend figures showed that £1.9 billion was poured into that single minute a day and £5.1 billion into the 17 minutes.
- So, 4% of video ad viewing took 26% of video ad spend; 95% of video ad viewing took 70% of ad spend.
- Turn this into the comparable measure of cost per completed 30-second view and the average cost across TV advertising (linear and BVOD) for 30 seconds is just over £6. For non-broadcaster online video it goes up to a whopping £45.

So, the potentially brand unsafe, often small screen, often partially viewable world of online video costs advertisers seven times more than TV. This doesn't sound like value for money.

## Online video's black hole

|                           | Revenue £ billion | Minutes of AV advertising per person, per day | Cost per Thousand (30 sec) |
|---------------------------|-------------------|-----------------------------------------------|----------------------------|
| Broadcaster TV (inc BVOD) | £5.1              | 17.5                                          | £6                         |
| All other online video    | £1.9              | 1                                             | £45                        |

Source: 2018, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2018 / AA-WARC



**Mixed response**

My article inspired shock, surprise, and shocked surprise. There were also some challenges.

Two challenges in particular were a) that the high price of online video is justified because it hyper-targets audiences, and b) that basing comparisons on an all adults price – as I did – is unfair because it doesn't factor in the higher price for smaller/harder to reach audiences and the resulting 'wastage'.

These are interesting. And they got me thinking about the idea of wastage in advertising and how the term is so badly used.

**Broad reach is vital to build brands**

While many brands have tightish target audiences for their most-likely buyers, most products are bought by most people to varying degrees.

And, crucially, if the first time you see an ad for Mercedes is in your 40s or 50s (when you're most likely to be in market for one), then it is too late. You need to have experienced years of brand exposure encouraging the desire to someday own one. Mercedes needs to 'waste' ads on people who are years away from being in the market for one of their cars.

The beauty of linear TV reaching people outside the target audience is that anyone who is not, say, 16–34 who sees your TV ad is absolutely free. Advertisers on linear TV only pay for the audience they buy; everything else is extra – bonus views. Not a penny wasted.

**Online advertising is rife with wastage**

It is the reverse story for online advertising. In online advertising, advertisers have to pay for every view their ads get, whether or not they are the desired audience. Nielsen data suggests that 65% of online impressions for 16–34s are 'in target', 35% 'out of target'.

The chart opposite demonstrates the difference in the nature of online advertising and linear TV advertising. It compares campaigns buying 1 million 16–34 exposures.

Linear TV isn't perfect. When buying 1 million 16–34s the sampling margin of error is roughly 10% so you might get 10% fewer or 10% more 16–34s than you bought. But you don't pay for any of the out-of-target audience, which, as you can see, is substantial. This exposure is absolutely free.

For a million 16–34 online impressions, on average only 65% will be aged 16–34. But the advertiser still has to pay for those who aren't. There is nothing extra for free.

**What about Broadcaster VOD though?**

Hang on, you might say. Advertising in BVOD is online advertising. And, yes, that is true. Some TV is also online video. However, there are important distinctions to be made.

Due to the quality of the first-party data broadcasters willingly receive from viewers, their in-target audiences are much better – i.e. more accurate than other online video.

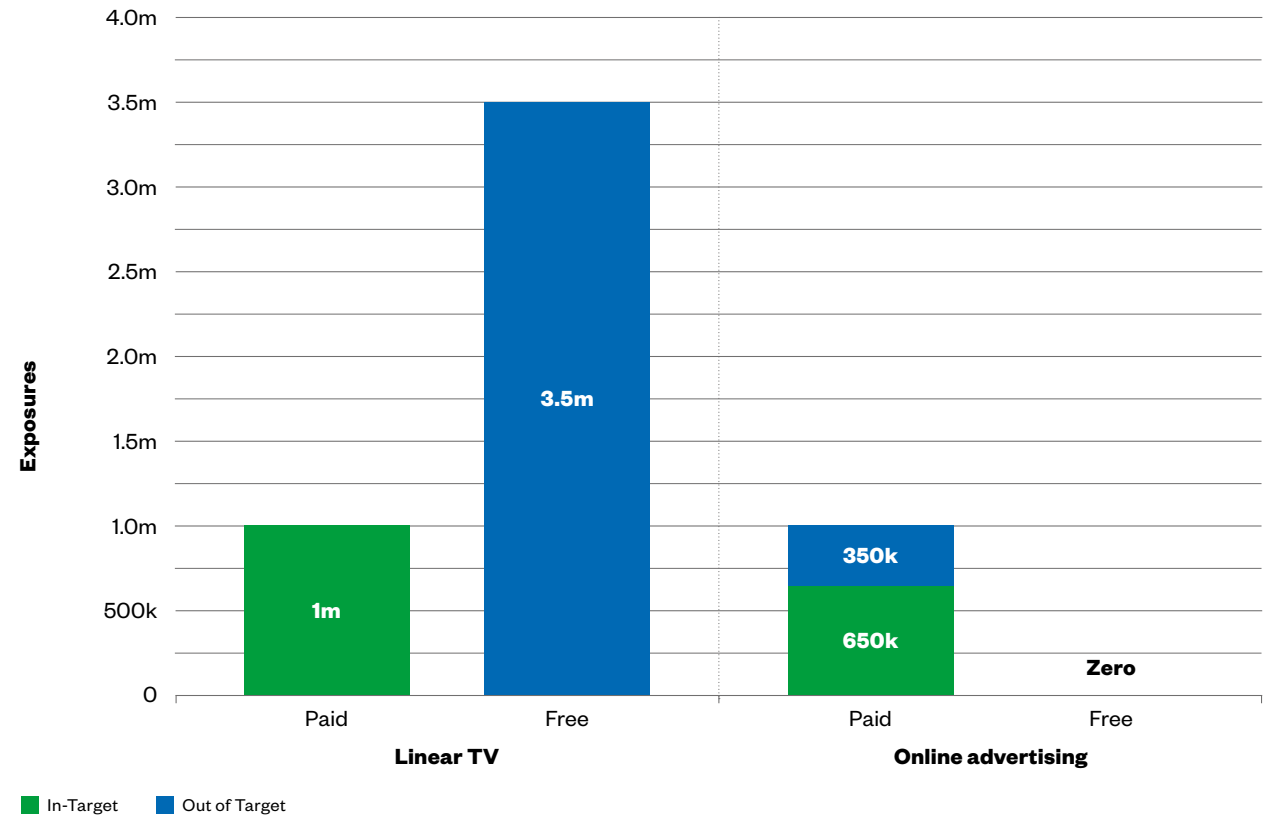
Also, as so much Broadcaster VOD is watched on large, shared TV set screens (70%), there is more out-of-target viewing that the advertiser won't be charged for. This is different from other online video, where viewing is device-led and thus more individual.

Wastage should be defined as paying for stuff you don't want – i.e. wasting your money. If we sensibly accept this, then linear TV doesn't suffer from any advertising wastage. In fact, it offers the opposite: extra viewers for free.

Online advertising, despite selling itself on tight targeting, forces advertisers to pay for people they don't want. This is another way that advertisers' money is being thrown into online's back hole. Sorry, black hole. ■

**The great wastage illusion**

When you buy one million 16–34 exposures you get...



Source: BARB: linear TV data based on top 50 profiling campaigns (over 10m impacts) for 16–34s June 2019, Online video based on Nielsen digital ad ratings UK benchmarks (18–34s) Q3 2018



Ben Fogle: New Lives in the Wild, Channel 5

# Demand Generation: maximising short-term return without sacrificing sustained growth

Demand Generation provided the industry with the broadest view of media performance to date. It went under the bonnet of which factors drive the optimal media plan for a brand. It led to the Demand Generator tool which helps maximise business returns from media investments.

The Demand Generation study by Gain Theory, MediaCom and Wavemaker followed Thinkbox's award-winning 'Profit Ability: the business case for advertising' (2017), which established average benchmarks for media performance.

But no brand is average, so Demand Generation took things further. Based on an econometric analysis of £1.4 billion of media spend by 50 brands across 10 forms of advertising over 3 years, Demand Generation provided practical guidance for medium-to-large advertisers, who don't have access to their own econometric analysis, on how to maximise their media-driven returns.

The study also isolated the principle variables that impact advertising effectiveness, and these have been used to create the Demand Generator. This is a tool that enables marketers to determine the optimal advertising media mix specific to their business and its objectives, based on:

- Category
- Budget
- Brand size (annual revenue)
- Appeal (e.g. mass market or niche)
- % of sales that take place online
- Desire to minimise risk

You can play with it at [Thinkbox.tv/demandgenerator](http://Thinkbox.tv/demandgenerator).

“  
Linear TV advertising and BVOD are the least risky forms of advertising  
”

## Demand Generation methodology

- Meta-analysis of econometric models conducted by Gain Theory, MediaCom and Wavemaker.
- Comprised of models for 50 brands, covering 14 product categories.
- Accounting for £1.4 billion of advertising media spend across three years.
- 6 categories isolated for analysis: FMCG, finance, retail, online retail, automotive, travel.
- 10 media channels isolated: TV, Broadcaster VOD, online video, cinema, radio, print, online display, generic search, social media, out of home.
- Channel risk/channel variability is based on the variance of ROI within the middle 50% of all campaigns analysed (i.e. excludes the worst-performing and best-performing 25%).

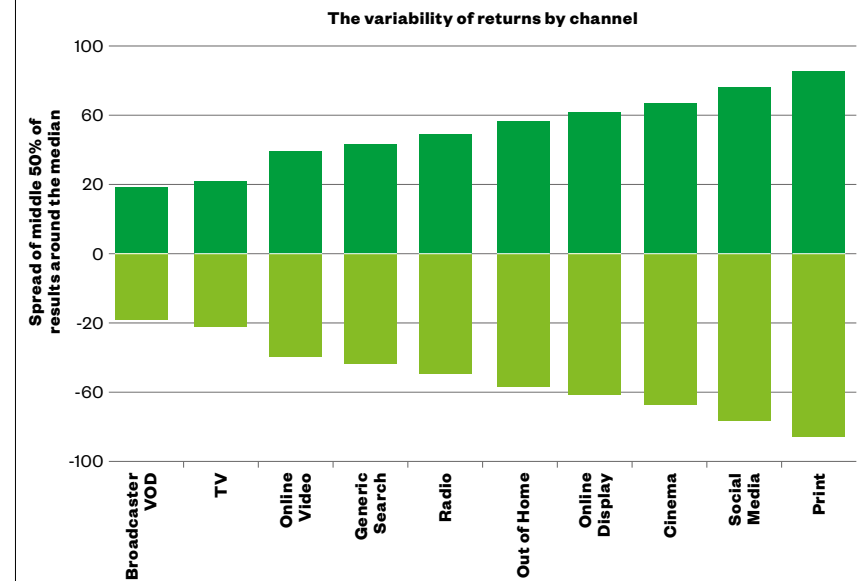
### KEY FINDINGS

#### Some forms of advertising are riskier than others

- The variability of returns differs significantly across different forms of advertising
- Linear TV advertising and Broadcaster VOD are the least risky forms of advertising, delivering just 20% of variance compared with the median return
- By comparison, online display, cinema, social media and print advertising all have a variability of +/- 60% compared with the median return. See chart to the right.

#### The variability of returns differs significantly across channels

A high level of variability away from the median return denotes a greater level of risk. The more variable the return, the greater the risk an advertiser has of making a poor media investment.



Drag SOS, Channel 4

Source: 'Demand Generation', Nov 2019, MediaCom / Wavemaker / Gain Theory



KEY FINDINGS

Most channels boost the efficiency of others, but the scale and consistency of the effect differs significantly

- TV generates the highest 'multiplier effect' across all other channels
- TV boosts the performance of other media channels used in a campaign by up to 54%
- Print, for example, boosts other channels' performance by up to 13%
- The average 'multiplier effect' across all channels is around 8%

“  
Measurement is not a problem in itself, but increasingly, marketers are measuring the wrong things.  
”

Within the first two weeks of a campaign, TV delivers on average 23% of media-driven sales

- This is the highest of any pure 'demand-generating' channel; the next best is print with 10%
- Generic search, which straddles 'demand generation' and 'demand fulfilment' and is TV's natural partner, delivers an average of 29% of media-driven sales within two weeks
- Due to the sustained effect of advertising, during the following 6-18 months, TV goes on to deliver a further 2.4 times more sales than it generated in the first two weeks
- Generic search goes on to deliver 0.8 times more sales than in the first two weeks and print 1.2 times more

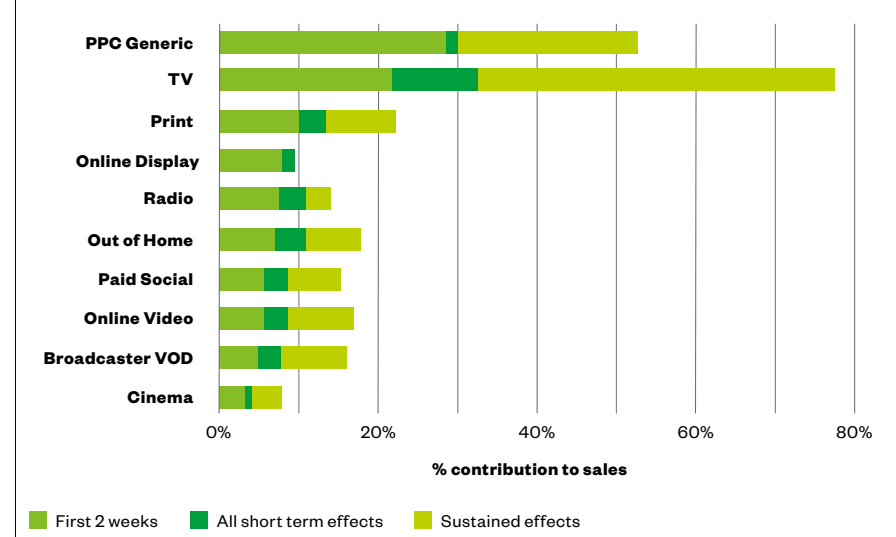
KEY FINDINGS

We need to put measurement right

- Measurement is not a problem in itself, but increasingly, marketers are measuring the wrong things
- This is driven by partial reporting, limited post-campaign analysis, a reliance on 'fast' data and measuring what we want to know, not what we need to know in order to make the most profitable media decisions
- Advertisers need to know what success looks like before a campaign goes live and to think hard about exactly which inputs from each channel will deliver the desired outcomes of the campaign
- It's also essential to pick the right measurement methodology for the task in hand – not one comes close to doing everything!

Read more and download the slides at [Thinkbox.tv/research](http://Thinkbox.tv/research).

TV's full short-term and sustained effects means it generates the best volume overall



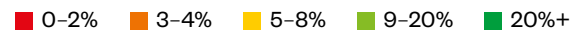
Source: 'Demand Generation', Nov 2019, MediaCom / Wavemaker / Gain Theory

Some channels massively boost the effects of others

Channel benefiting from the effect

|                    | TV | Online Video & VOD | Social media | Online display | Out of home | Radio | Print | Cinema | Direct mail | Generic search |
|--------------------|----|--------------------|--------------|----------------|-------------|-------|-------|--------|-------------|----------------|
| TV                 |    | 20%                | 31%          | 31%            | 22%         | 31%   | 31%   | 54%    | 20%         | 8%             |
| Online Video & VOD | 3% |                    | 5%           | 2%             | 5%          | 3%    | 12%   | 7%     | 2%          | 1%             |
| Social media       | 2% | 2%                 |              | 2%             | 3%          | 2%    | 3%    | 3%     | 1%          | 1%             |
| Online display     | 3% | 4%                 | 4%           |                | 4%          | 3%    | 9%    | 11%    | 4%          | 3%             |
| Out of home        | 6% | 8%                 | 9%           | 8%             |             | 9%    | 11%   | 3%     | 1%          | 1%             |
| Radio              | 4% | 4%                 | 4%           | 6%             | 4%          |       | 3%    | 1%     | 1%          | 2%             |
| Print              | 5% | 6%                 | 7%           | 5%             | 6%          | 4%    |       | 13%    | 7%          | 4%             |

Source: 'Demand Generation', Nov 2019, MediaCom / Wavemaker / Gain Theory



# Short-term success stories



## Vinted

### Challenge

Fashion marketplace app Vinted launched into a competitive UK market that included established brands such as Shpock, Gumtree and Depop. They wanted to replicate their European success, which had been driven by low-cost, high-frequency and broadly targeted campaigns.

### Solution

Vinted's media agency, VCCP, suggested a more experimental, test-and-learn approach to cover four areas: audience-centric planning, value optimisation, integrated creative and bespoke scheduling. The insights gathered led to a larger campaign with a younger target audience, and a Sunday-to-Thursday skew into more peak, high-quality programming with their 30" creative.

## Results

With the move away from a cheaper, performance-led approach to TV advertising, Vinted was able to become a bigger player in a shorter period of time, with **downloads exceeding expectations** and **cost-per-download below targets**. They were also shortlisted in the Thinkbox TV Planning Awards for 'Best newcomer to TV'.

TV is excellent at turning products into brands thanks to its scale and emotional connection with viewers. But TV is a marketer's Swiss Army knife. Its brand-building blades are razor-sharp, but it has the magnifying glass, the corkscrew and the tweezers too. Our Demand Generation research proved that TV is increasingly effective in delivering massive short-term impact for brands, as these case studies show.

## Pension Wise

### Challenge

Pension Wise offers free, impartial guidance for those over 50 who wish to understand their options in retirement. They wanted to build awareness, trust and affinity in the brand, as well as reach a target of 7,500 appointment bookings per month.

### Solution

Wavemaker came up with a TV campaign to inspire the target audience to talk about pensions with their loved ones. TV would be the key medium needed to achieve their objectives. Not only is it emotive and trusted, but it meant they were able to reach people when they were with friends and family, in a dual viewing environment. The creative showcased best friends David Baddiel and Frank Skinner, whose light-hearted approach brought humour and warmth to the topic.

Working closely with Sky, they utilised their advanced technology to stretch Pension Wise's relatively small budget in order to create high impact.

## Results

The results were impressive and rapid. Pension Wise saw a **40% increase in bookings and appointments** for the same quarter year-on-year, and they **beat the target of 7,500 appointments by 16%**. There was also a **+15%pt increase in unprompted awareness**.

## Habito

### Challenge

Online mortgage advisor Habito wanted to enter into a very valuable but small market. As a venture capitalist-backed start-up, they needed to deliver immediate results to drive growth for their young business.

### Solution

Embracing IPA best practice, they were committed to brand building on TV. Their creative agency produced a bold TV advert using contemporary animation and a heavy metal soundtrack. Moving away from a traditional DRTV approach, they embraced brand building on a limited budget, running spots selectively in high-impact, high-attention airtime.

## Results

With the media and creative working hand in hand, short-term goals for enquiries and leads were all exceeded. **Spontaneous brand awareness doubled** and customer volumes increased three and a half times.

- 5 Pension Wise
- 4 Vinted
- 3 Habito



## Specsavers

### Challenge

With a track record of innovation in the optics industry, Specsavers were on a mission to end avoidable sight loss in the UK by raising awareness of eye health and encouraging people to get their eyes tested.

### Solution

Manning Gottlieb OMD found that eye test avoiders spend about four hours a

day watching TV and were interested in big programmes – cultural and sporting events that provide fuel for conversations.

They planned a contextually relevant campaign, collaborating with Sky and Channel 4 to reference topical TV content and storylines in the creative, with some executions turned around on the day of airing. Specsavers ran 33 spots across eight days, which allowed them to reach 57% of the UK within high-interest and newsworthy moments.

## Results

After the campaign, 90% of people agreed that eye tests are an important general health check and in the period immediately post campaign, Specsavers **tested almost 40,000 more eyes** than the same period the year before.

To explore our bank of TV success stories, visit [Thinkbox.tv/casestudies](http://Thinkbox.tv/casestudies).



# 2019 at a glance

**94.1%**

In total, TV reaches 94.1% of individuals in the UK

**Eat Them To Defeat Them**  
ITV and Veg Power campaign to get kids eating vegetables

**Channel 4 presents Dynamic TV ad innovation:** Boots and Suzuki first brands to deliver bespoke data-driven creative



**3.2m**

Derry Girls season 2 kicks off with **3.2 million viewers**, Channel 4's biggest comedy launch for 15 years

## Jan

**Commercial TV wins big at the NTAs:** The Chase, Emmerdale, This Morning and I'm A Celeb all winners

## Feb

**5.8m**

England vs. Ireland draws audience of **5.8 million** in the rugby Six Nations

## Mar

**The Big TV Festival 2019:** Channel 4, ITV and Sky combine with Thinkbox to inspire advertising's new generation

**UKTV premiere of Flack on W:** first drama series commissioned for the channel

**Nike's 'Nothing Beats a Londoner' wins big:** ad created by Wieden+Kennedy and Megaforce, picks up British Arrows Commercial of the Year

**5.86m**

Game Of Thrones became the biggest programme on a Sky channel ever with an average of **5.86 million** for its best episode



**BAFTA wins for commercial TV:** A League of Their Own, Britain's Got Talent, Succession, I'm A Celeb, Patrick Melrose and Channel 4 News

**Sliced goes forth on UKTV's Dave:** new pizza delivery comedy shows the real south-east London

**The Big Bang Theory comes to an end** after 12 seasons and 279 episodes

**ITV2's biggest audience ever:** Love Island's launch episode draws 5.9 million viewers

**Walkers brings back the Spice Girls** for their first TV campaign with the brand in 22 years



## Apr

**TV sponsorship first for Marks & Spencer** as the retailer teams up with ITV's Britain's Got Talent

**Tiger Woods has historic victory at The Masters:** his first major championship in 11 years



## May

**Sky adopts NBCUniversal's CFlight** as its global measurement standard

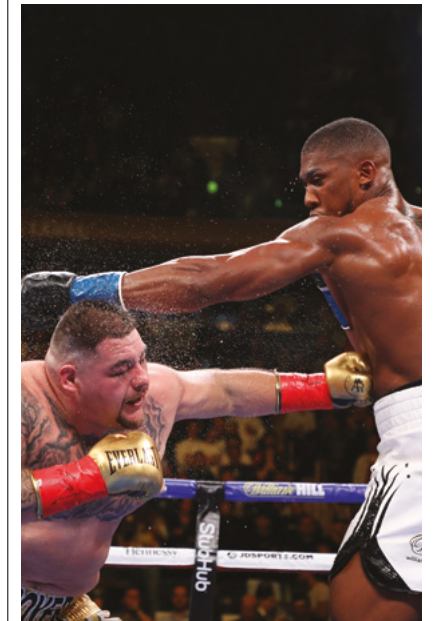
**Chernobyl becomes IMDb's highest-ranking TV show ever** with a 9.7 rating from 140k users

**10k**

Monzo's first TV campaign sees **10,000 new customers** sign up on the first day

## Jun

**Anthony Joshua vs. Andy Ruiz Jr:** viewers tune in at 3am to watch heavyweight champion suffer a shock defeat





## Winner

MediaCom UK and Tesco win Grand Prix at the Thinkbox TV Planning Awards

'Complaints Welcome' campaign from Channel 4 celebrates diversity and fuels debate

Edinburgh TV Festival 'TV Moment of the Year' is 'The English Conkers Crisis' from Bros: After The Screaming Stops



Emmy wins for Chernobyl, Game of Thrones and Fleabag

## Jul

11.7m

England v USA FIFA Women's World Cup semi-final attracts 11.7 million live viewers

Channel 4 and Sky share live coverage of the Cricket World Cup: England's triumph over New Zealand peaks at 8.3 million

## Aug

Gold airs Dad's Army: The Lost Episodes: episodes not seen since 1969 re-shot with a new cast



## Sep



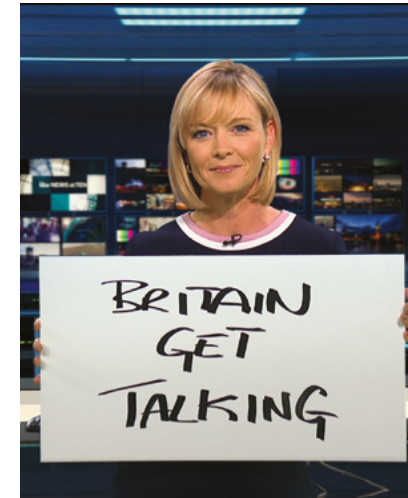
Starbucks and Iris win Channel 4's Diversity in Advertising Award: focusing on LGBT+ representation and stereotyping

Channel 4 to join AdSmart, Sky's addressable TV ad platform

WarnerMedia announced new structure: for Warner Bros., Turner, CNN and many more brands under the WarnerMedia umbrella

Sky Crime debuts: a new channel for premium true crime

Ant & Dec pause finale of BGT: The Champions for 'Britain Get Talking', ITV's new mental wellness campaign



## Oct

Harry & Meghan: An African Journey airs: emotional interview with Tom Bradby makes headlines around the world

The Age of Television wins Gold at Media Week Awards: Thinkbox research explains why we watch what we watch and why different forms of video co-exist

9.7m

The Great British Bake Off final draws 9.7 million consolidated viewers

12.8m

Rugby World Cup final coverage peaks at 12.8 million viewers, the most watched TV moment of 2019 so far

The Cockfields starring Joe Wilkinson, Diane Morgan and Sue Johnston debuts on Gold

Demand Generator unveiled: new tool, powered by econometrics, helps maximise business returns from media investment.

World TV Day celebrated across the globe on Nov 21st

## Nov

Channel 4, ITV and Sky collaborate in creative brand partnership for Tesco's Christmas campaign

ITV announces new addressable advertising platform, Planet V: due to launch in 2020

Ice sculpture takes PM's place: Boris Johnson and Nigel Farage are 'empty chaired' during Channel 4's climate change debate

Campaign's Film Ad of the Year is Bodyform's groundbreaking 'Viva la vulva', created by AMV BBDO

Former speaker John Bercow delivers Channel 4's alternative Christmas message



## Dec

Johnny Vegas and Sian Gibson reunite for Dial M for Middlesbrough on Gold

Thinkbox launches new TV ad: 'Tooth Fairy' shows the transformative effects of TV advertising

17.1m

Gavin and Stacey Christmas Special is most watched scripted show of the 2010s with a 17.1 million consolidated audience



# Future of TV

# Views from the top



**Bobi Carley**  
Head of Media, ISBA

ISBA's **Bobi Carley** interviews the broadcaster commercial chiefs on some of the opportunities and challenges ahead for TV.

Transforming technology brings with it a whole series of opportunities and challenges for TV; competition from the streaming services for audiences and talent, the impact of broadcasters' own investment in OTT services, bringing a redistribution of viewing towards on-demand and with it an increased challenge for reaching younger audiences. Meanwhile, technology is also transforming the TV advertising landscape with addressability and the emergence of a range of new data solutions. We asked Bobi Carley of ISBA to interview the broadcaster media chiefs to find out more. *(NB This interview took place some weeks before the global coronavirus crisis).*

**Bobi Carley (ISBA)** There has been much talk of collaboration between the broadcasters in recent years. What does this mean in practice and what are the benefits for advertisers?

**Kelly Williams (ITV)** Over the last couple of years we have been doing this more and more with a series of initiatives to benefit advertisers and agencies. We've done this with The Big TV Festival, the inspirational training event for young planners and advertisers which is now in its third year.

Jonathan Allan,  
John Litster and  
Kelly Williams

**John Litster (Sky)** We've always collaborated via Thinkbox, but we aim to turbocharge this by providing even more support. We've partnered on research studies, events and increasingly on measurement initiatives. We're also collaborating with other TV companies around the world via our membership of EGTA and the Global TV Group, so we expect this momentum to continue.

**Jonathan Allan (Channel 4)** Well, it helps that we like each other, and we broadly agree about the strategic direction for TV. We agree on the power of us joining forces and selling television as a whole; particularly vs the big tech platforms. We need to get into boardrooms to make the case for TV. The macro stuff we agree on. Obviously, as you would expect, we remain highly competitive for revenue, which benefits advertisers.

**John** We're aligned on that and we will get there. This year we are prioritising addressability and measurement.

**JA** We will continue to compete on revenue but aim to collaborate on technology and everything else to make it easier for advertisers. We've also all invested in advertiser sales teams. They're more skilled in marketing and media planning and keen to help advertisers deliver their objectives.



**Kelly Williams**  
Managing Director,  
Commercial, ITV



**John Litster**  
Managing Director,  
Sky Media



**Jonathan Allan**  
Chief Operating Officer,  
Channel 4





**Bobi** Let's talk about the future of TV advertising. What new capabilities are you focusing on over the next few years? What should advertisers be excited about?

**Kelly** We're in the foothills of advanced advertising. As a TV industry we're in a process of transition so that over the next 10 years, TV is going to migrate from being a broadcast medium to an IP-delivered one. Planet V will be the platform to help us at ITV make this transition. It will be an open platform and we've invited Channel 4 and Sky to participate too. We're also doing creative solutions well. We own the IP so we can get brands close to content.

**JA** We need to relax a bit about linear TV. It is changing and at some point, all of TV is going to be IP-delivered. We shouldn't be defending linear, we should be looking at TV as a whole and as advertisers you should be buying Channel 4 and ITV and Sky in all its forms, not just linear. The fact is most advertisers are not spending enough on BVOD to optimise their reach. Channel 4 will soon be available on AdSmart, and YouView addressable will be available next year. From an executional point of view, branded entertainment is going to be big for us. We're setting up a digital studio to produce social content, run out of Leeds, to extend our reach against younger audiences.

**John** Over the next few years, advertisers should expect to see more addressability across more platforms with more and better targeting opportunities. AdSmart has moved

Chernobyl, Sky Atlantic

Cricket World Cup Final, Channel 4 & Sky Sports



onto the Virgin platform and is expanding with the Channel 4 partnership. We'll continue to collaborate on data and adtech. We want to make it easier for advertisers to trade with us. We're excited about the launch of Sky's "One Campaign" initiative this year. This will be one simple way for advertisers to manage a campaign with one audience across all platforms, one total view and one unified price.

**Bobi** With streaming services like Netflix and Amazon making huge investments in programming, how is a more competitive content landscape changing the way you schedule, commission and distribute content?

**John** We are now part of an organisation that spent \$24 billion on programmes last year. We won 34 Emmys, 10 of which were for Chernobyl. It was also the highest-rated show in history on IMDb. This last year has been an incredible one for TV viewers and the key point is that these viewers watch the content in a variety of ways including, but not exclusively, at the time of the linear transmission. We need to allow our customers to watch in whatever way they choose and curate content choice accordingly. It is what our competitors are doing.

“ Advertisers should expect to see more addressability across more platforms with more and better targeting opportunities. ”



**JA** When you've got competition you need to think about what it is that makes you different. The fact is there's nothing on Netflix that's better than the best of what we've all got. They're not making much local content; they're not really doing sport in a serious way. Netflix is also under pressure in its home market like never before, which will also see their catalogue being pulled back by networks launching their own services.

**Kelly** The streaming services are important business partners for us. We're a broadcaster/producer so Netflix is also a customer. We co-produce on a number of shows meaning that we can offer better

The End of the F\*\*\*ing World, Channel 4  
Love Island, ITV2

quality shows to the UK viewer as a result. And of course, BritBox is there to satisfy the demand for pay-lite.

**JA** Windowing is key for us. If we partner with Netflix such as we did on The End of the F\*\*\*ing World, we get the exclusive UK window and they get to use it elsewhere. That works for both parties.

**Kelly** But, setting aside the SVODs, let's not forget TV's fantastic, extraordinary cultural moments this year; the Rugby World Cup Final, the Prince Andrew interview, melting ice sculptures in place of politicians on Channel 4, the finale of Game of Thrones, the Cricket World Cup, Love Island and The Great British Bake Off.

Other people talk about what's happened in press and assume the same thing will happen to TV. The big difference is that you watch TV on a big screen and all your furniture is pointed at it. What we're facing is more competition on that screen.

“ We need to relax a bit about linear TV. It is changing and at some point, all of TV is going to be IP-delivered. We shouldn't be defending linear, we should be looking at TV as a whole and as advertisers you should be buying Channel 4 and ITV and Sky in all its forms, not just linear. ”





**Bobi** There's been a lot of talk in the industry about young people's viewing. As younger audiences' viewing continues the migration from linear to VOD, what are your primary strategies for securing their viewing in the long term?

**Kelly** Young audiences have always been harder to reach than others. But you can crack content for 16-34s, and Love Island is a good example, as is I'm A Celebrity...Get Me Out Of Here! which did great numbers last year. If you build it, they will come. There has been big growth in BVOD viewing and if you look at who's viewing it's a much younger profile. We have 75% of 16-34-year-olds in the UK registered on the ITV Hub. We are also investing disproportionately in ITV2. We had lots of different advertisers partnering on Love Island. The show has shifted our view. It's not just great entertainment, it is an extremely effective sales platform for everything from water bottles to make-up to fashion.

**JA** We're all investing in OTT platforms. All 4 is the youngest BVOD platform in the UK. Ours is an ad-funded business and we're trying to appeal to viewers, but we need to please advertisers too. If we were just appealing to the former, we'd put everything available in box set form from day one. In a world where everything is measured the same, that doesn't matter. Progressively you need to forget about the differences between linear and BVOD and focus on what the viewer wants.

**John** So much of this is looked at through the lens of linear. No retailer would just look at their sales through the high-street channel alone, so we need to continue the dialogue with advertisers about looking at viewing across all platforms, not just

- 1 I'm A Celebrity...Get Me Out Of Here!, ITV
- 2 Tesco Christmas Campaign
- 3 Game of Thrones, Sky Atlantic

linear. We talk about appointment-to-view programming but BVOD is, in fact, the appointment-to-view programming for 27 million people. On demand is over 76% big-screen so BVOD's mode of TV viewing is broadly the same as linear. It's highly effective and it's potentially cheaper to reach 16-34s on BVOD than it is on linear - and yet the brand count in BVOD is still lower than it should be. Meanwhile, too much media investment money has gone into other non-TV channels and there is much less evidence of them being effective. I hope that our CFlight measurement tool will help advertisers plan TV much more holistically.

**JA** It's also worth noting, this is not just a challenge for TV, it's a problem for all of video advertising. It's harder to reach 16-34s full stop, as their viewing is migrating to non-commercial, less-viewed and less-effective advertising environments.



**Bobi** The number one priority is measurement for the businesses ISBA represents. Advertisers want full cross-media measurement. When can we expect to see the much-anticipated solution for de-duped campaign reach across all forms of TV?

**JA** We appreciate that there is a level of frustration in the industry about the perceived pace and we sympathise. BARB's Project Dovetail will give you what you're looking for. It's complicated and challenging to deliver but it's still the best end solution. It protects TV's transparency and is Gold Standard. In the meantime, we are creating and paying for our own solutions.

**Kelly** It is technologically hard to manage this process. To illustrate this, the ITV Hub is on 30 different platforms so whenever one of them, such as Apple makes a tweak to their operating system or changes their rules it requires us to adapt our own tech. So, as fast as we institute fixes, more are required.

**John** But we're working together collectively to deliver something which should help in the meantime which is CFlight. This is currently available on Sky and our partner channels but we're collaborating to extend it to other channels. We will look at BARB audiences and replicate them in on-demand, using our 500K Sky Viewing Panel to do that and Freewheel impressions data. Bringing in the ITV Hub, the All 4 Player and the Channel 5 player via RSMB so we're not marking our own homework, we'll show how you can get incremental reach via BVOD and then additional reach via addressable. We're in engagement with the IPA and ISBA. It should be fit for purpose in the next few months.

**Bobi** Apart from money, what do you want to see from advertisers and agencies?

**John** We would love to come in and talk to your business, as a collective. To help you and to tell TV's story. We used to get briefed a lot on what advertisers wanted

to do. That is rare nowadays. Brief us on the business outcomes you're trying to affect. Give us a collective brief.

**Kelly** We've found that sitting down with advertisers and agencies, where they share their business challenges, makes a big difference. On Tesco, we sat in one of these sessions and challenged them to give us a joint brief. The Tesco Christmas idea came out of it. There's so much more we can do. We're trying to push the boundaries as much as we can. I'd like to encourage you all to sit in a room and share your business challenges with us.

**JA** For advertisers to think constantly about effectiveness. We've always known what a fantastic job TV does in brand building and that will remain the case, but it also does a brilliant job at driving sales in the short term. TV is unusual in that it does both. Don't forget about its short-term effect. We've got brands coming onto TV because of that combined effect. The booming D2C sector is illustrative of this. Look at how the digital disruptor brands like Amazon are increasing their investment in TV. ■



# Upping the industry's TV know-how in 2020

This year, Thinkbox is creating a brand-new online training course that will tool up your teams so they can get the very best out of television. Here are some answers to the burning questions that pop into your mind on reading a statement like that.

## What is this?

It's an inspiring and informative modular video course that comes with lots of useful downloadable material, brought to you by Thinkbox and assorted industry luminaries.

## Are you sure we need another training course?

Yes, because a good number of advertiser and agency leaders have told us so. Many see a skills gap that needs filling and would welcome something that builds the TV capability of their teams. They have asked Thinkbox to crack on with it. With TV at the heart of delivering business growth for advertisers, it's essential that everyone is up to speed with how it is changing, the role it plays in the mix and how they can get the best out of the nation's most effective medium.

## Who's it for?

Advertisers and agency folk who are in the first four years of their careers; those moving into a new role where a good understanding of TV is essential; but also senior people, with broader responsibilities, who just want to boost their knowledge about TV in a particular area.

## What will people get out of it?

A great deal, we hope. The list is long, but in a nutshell the aim is to empower people to have more confident, informed conversations about TV and drive better business performance for advertisers. Being more effective at work, when it comes to TV, shouldn't do careers any harm either. We want this course to do a fantastic job for those who take it as well as the organisations they work for.

## When will it launch and how do I find out more?

Later in 2020. In the meantime, do get in touch if you would like us to keep you in the loop.

## Subjects we'll cover:

- The viewing landscape
- Where TV sits in the video world
- How and why we view
- TV advertising's role
- Driving cost-effective reach
- How TV is traded
- BVOD
- TV and other media
- Attention
- Multi-screening
- Planning & buying
- Jargon busting
- Advertising effectiveness
- Measurement
- Dynamic TV advertising
- Addressability
- Lots of good stuff about commercial partnerships and how advertisers can get close to TV programming

And loads more.



## Industry approved

“ Young people in our teams just don't know enough about TV, the role it plays in the mix or how they can use it to drive our clients' businesses. ”

“ I think this is a brilliant idea. You can see people getting quite senior without ever understanding the vital role that TV plays. TV is missing out. This is absolutely a necessary thing. ”

“ Filling this skills gap would be one of the best things Thinkbox could do. ”

“ I think a Thinkbox TV training programme is a fantastic idea and we would support it. ”

## Big thanks to...

We've consulted a wide range of industry stakeholders about what they would want from a Thinkbox TV training course and we're hugely grateful for their enthusiasm and support and also for the many excellent ideas and insights they've contributed.

**Alchemy Media**  
Karen Light

**All Response Media**  
Andy Sloan  
Oliver Bertwistle

**Blue449**  
Alice Jones  
Malcom Boxall

**British Gas**  
Tarek Boudour

**Carat Manchester**  
Pete Metcalfe  
Liz Chapman

**Dentsu Aegis North**  
Richard Johnston

**Direct Line Group**  
Sam Taylor  
Simon Vaughan

**Essence**  
Clare Chapman  
Natalie Sajal

**Havas Media**  
Chris Allen  
Tash Reade

**Initiative**  
James Temperley  
Will Dean

**ISBA**  
Bobi Carley

**Manning Gottlieb OMD**  
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**MediaCom**  
Geoff de Burca  
James Beesley

**MediaCom Birmingham**  
Paul Bramwell

**MediaCom Edinburgh**  
Maud Cant

**Mindshare**  
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Harmeena Nijhar

**m/Six**  
Jean Sarhadar  
Lauren Knapp

**OMD**  
Jess Bates  
Vicky Fox

**Publicis**  
Tillie Russell

**Republic of Media**  
Jan Cerretti

**Starcom**  
Nadine Young

**The Kite Factory**  
Conor Newman-Walley  
Rik Moore

**the7stars**  
Sam Stevenson  
Rhiannon Murphy

**The Specialist Works**  
Tim Neligan

**Total Media**  
Holly Mason  
Mihir Haria-Shah

**UKTV**  
Elis Bieseck

**Unilever**  
Emma Saksena

**UM Manchester**  
Ed Burns

**UM Birmingham**  
Kevin Murphy

**Vizeum Manchester**  
Martin Tingle

**Wavemaker**  
Annie Langley  
Emma Moorhead  
Ian Stevens

**Wavemaker Manchester**  
Nola Calladine

# From diversity to representation: moving forward in advertising

With its unrivalled ability to change behaviours and shift perceptions, TV advertising has a big role to play in driving diversity and inclusion. But how is it doing and how can it do better?

'Mirror on the Industry: How Diverse and Inclusive is TV Advertising?' was released in 2019 by Channel 4 in partnership with YouGov. The study shows that whilst steps are being taken, the TV advertising industry hasn't come far enough fast enough. Representation of minority groups within current TV advertising is still lower than the proportion of the population that they make up. The research also revealed that tokenism and stereotyped portrayal is still a major issue, and is being increasingly called out by members of minority groups.

With research uncovering the commercial, creative and societal benefits to becoming a leader in this space, we reached out to industry diversity and inclusion leaders and asked them for advice on how we can help deliver better representation across the board.



Representation of minority groups within current TV advertising is still lower than the proportion of the population that they make up.



LEILA SIDDIQI, IPA

## Measure it and hire apprentices

Any diversity and inclusion discussion must start with the data, as without it there is no baseline to measure from. A study or an audit that looks at the statistics of representation in TV advertising in detail will help inform the basis for a strategic roadmap for the future.

One of the best ways of increasing diversity is through hiring apprentices for entry-level roles. Not only do they bring in diversity and a fresh perspective, they are growing up in a multicultural, tech-led society and have the confidence to openly challenge inequality and underrepresentation.



MICHAEL ALHADEFF, AMV BBDO

## Push the boundaries and take more chances

That's why we are in this industry, and it leads to truly great work. If we keep pushing, then barriers will eventually come down. In all its forms, shapes and sizes, ideas have the ability to move people, make people cry, make people laugh and everything in-between. Truly great ideas will always be inclusive in their ability to transcend different groups of people.

We could retreat into our shells and keep doing what we are accustomed to. Or we can see it as an opportunity to take more chances on people, ideas and ways of doing things. The world we live in is changing and we have the opportunity to shape it.

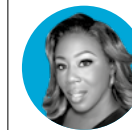


MARK RUNACUS, OUTVERTISING

## Be authentic: start by understanding your LGBTQ+ colleagues and customers

Numerous studies have proved that the LGBTQ+ community is seriously underrepresented in TV advertising. And more research has shown that brands who include us positively and authentically build powerful emotional engagement with a broad audience way beyond LGBTQ+.

Our free Outvertising guide is essential reading, but in summary we recommend avoiding stereotyping and pink-washing; and ensure your LGBTQ+ engagement is meaningful, sustainable and not just for Pride month.



LYDIA AMOAH, BUSINESS COACH AND DIVERSITY SPECIALIST

## Build relationships with ethnic/multicultural consumers and reflect cultural trends

The media has the power to not only inform but to influence perceptions about the world and people around us. I would encourage further research to investigate its capacity to build the foundations of an ethnically and culturally more inclusive society.

The television and advertising industries hold a public responsibility to communicate the truth, and have been gifted with a platform to influence thinking and determine behaviours.

My suggestion is that the current representation of ethnic characters in media should be increased as well as creating campaigns and platforms which are more inclusive, both in terms of ethnicity representation and the advertising of ethnic products.





# Televisonaries

# Think dramas, not lectures



**Orlando Wood**  
Chief Innovation Officer, System1 Group

System 1's **Orlando Wood** explains how a certain way of thinking and working has undermined advertising creativity, making advertising less effective.

In October 2019, the IPA published *Lemon*. The book is a unique blend of neuroscience, cultural history and advertising research. It shows how a certain way of thinking and working has undermined advertising creativity, making advertising less effective.

The publication follows on from *The Crisis in Creativity*, by Peter Field (IPA, May 2019). Where Peter identifies the problem, I seek in *Lemon* to provide a diagnosis and a cure. *Lemon* is, as the cover playfully suggests, a 'repair manual' for the advertising brain.

I first make the case for creativity: ads that entertain, generate profit gain. I show this through System1's measurement of emotional response to every ad in a category, demonstrating how this can be used to understand and predict brand market share changes in subsequent periods, and across different categories. The emotional response today to a brand's ads (and those of its competitors), tells you what is likely to happen to market share in the future (six+ months). The problem is that creativity is in crisis. Different datasets show it and largely agree on the timeframe over which it has occurred – around 2006. So why and how is this happening? The diagnosis I give is grounded in the work of neuropsychologist Dr Iain McGilchrist. It used to be thought that the left brain and right brain did different things: one reason and one emotion, for instance. This is not the case. McGilchrist reframed the question and arrived at a different

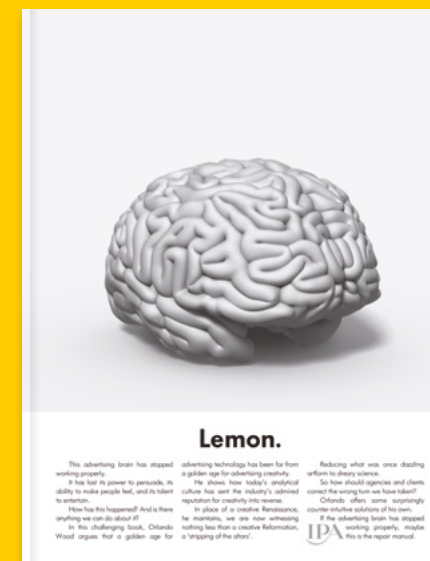
and more useful description: it's not that the two hemispheres do different things, but that they *do things differently*; have different takes on the world – different attentional priorities.

Describing how this works in birds is instructive: the left brain is what helps a bird to abstract grains of food from their context, identify and categorise them; the right brain all the while is broad and vigilant in its attention, open to novelty, contradiction and ambiguity, and continues to scan the environment around it to make sure it doesn't become something else's lunch. The same is true in people and other mammals. The left brain represents the world for us through flat, abstracted and linear models, is impetuous, dogmatic and seeks to manipulate it through tools and words. The right brain is broad and vigilant in its attention, sees the world as it really is and as a series of relationships and connections, is alert to the living, understands people and the implicit; it's what gives us our sense of depth and lived time. We need both for great creative leaps.

But the left brain can become too dominant in people and society, and you can trace this through history in culture. The Renaissance brought with it a whole-brained way of looking at the world – depth emerged in art after a thousand years of flatness, as did empathy and the liberal referencing of other things; the Reformation, on the other hand, stripped things back to the 'authentic', removed

characters, metaphor and ornament, and prioritised the word of God. We are in such a period today and it is particularly marked in the advertising industry.

You see left-brain dominance in short-termism, but you also see it in creative style. We are living through a 'creative Reformation'. Work today is flatter, more abstract and devitalised than it was just 15 years ago; it has fewer characters, less drama, is more literal, self-conscious and reliant on the 'word'. This shift in style matters because it dampens emotional response; it is harming advertising effectiveness. And so, to the cure. If we wish to attract and sustain attention, if we want people to notice and remember our advertising, it is to the right brain that we need to appeal. The trick is to use the living – show people connecting as characters and create an on-screen sense of 'betweenness'. Play with culture using parody and pastiche. Show a scene unfolding. Think dramas, not lectures! Above all, entertain for profit gain. *Lemon* describes more 'whole-brained' ways of working to achieve these ends. Indeed, it offers up a positive manifesto for agencies, and more than one agency has told me that they are embracing it. Clients and media owners are supportive too. After a period of dreary flatness, abstraction and self-consciousness in advertising, here's hoping it might just be the start of something new. ■



# Brand experience should not distract marketers from fundamental brand truths



**Paul Feldwick**  
Consultant & Author

Renowned advertising consultant, coach and author **Paul Feldwick** asks whether 'brand experience' is a helpful concept, or if it is in danger of becoming a fashionable buzzword.

Apparently brand experience was big at Cannes in 2019: Jonny Bauer of Droga5 told us "everyone understands now that the experience needs to be consumer-centric", while Pablo Alzugaray of Accenture helpfully clarified – "Experience is any sensory, mental or emotional interaction with a brand. It means the product, service, content and ads. To create and distribute efficiently these experiences are the key to building up emotional relationships."

This may be true, but is it new? I would argue that just about all brands, throughout history, have depended on experiences delivered through paid, earned, and owned channels. For some, most obviously the packaged goods brands on which much theory used to be based, paid-for advertising played a dominant role; for others, advertising as such has been peripheral. Another obvious, less comfortable, truth is that many experiences that any individual will have of a brand are not fully under the control of the brand owners – as Jeremy Bullmore pointed out in his classic 2001 lecture, 'Posh Spice and Persil':

*You see a truck, boldly branded, driving badly on the M25. You see a pack in the house of someone you dislike. You read that the company that makes the product has been taken to court for racial discrimination. The daughter of a friend is fired by the parent company. You receive an illiterate and ill-spelt letter from head office. After holding on for 25 minutes, you have still to speak to a human being at the company's call centre.*

Like people, brands have body language; and it's a language we understand.

#### **Brand principles haven't changed**

Probably the simplest, most useful way to think about brands is as mental associative networks, a psychological construct that goes back to Aristotle. Each encounter with a brand potentially adds to and changes a complex associative network in our brains, linking the brand to other images, experiences, and feelings. For any brand experience to become part of the right associative network, the brand must be easily and uniquely identified – so distinctive assets such as logos, characters, colours, slogans, or tunes are of central importance in making brand experiences effective. It helps if the associations are ones we find mostly pleasant or attractive



McDonald's

“ Each encounter with a brand potentially adds to and changes a complex associative network in our brains. ”

rather than repellent. But probably even more important is the number, range, and intensity of the associations, because this will increase the probability that the brand will come to mind in a wide range of contexts. This, at any rate, is my understanding of the theory of 'mental availability' proposed by Byron Sharp and his colleagues in the How Brands Grow books. What does such a theory imply for marketers?

Firstly, that scale is important; the more effective impressions you deliver to more people, the better. Big brands are bigger because more people buy them. Powerful communications of any sort will have little impact unless, through whatever means, they reach a mass audience. And because brands compete for mental availability, this must be proportional to what others are doing; also maintained through time, because otherwise the associations created tend to decay, or be supplanted.

Secondly, all impressions must be fluently linked to the brand – consistency in the use of distinctive assets or 'fluent devices' is essential.



Thirdly, apart from consistency in the use of distinctive assets, it is more important for brand impressions to be interesting, appealing, or in some way stimulating, than to be constrained by adherence to a narrow script. Brands could learn from entertainers who flourish by continually surprising their audiences with something new and unexpected, sometimes even controversially (think David Bowie, Madonna, Miley Cyrus).

All this can be done through paid-for advertising, which has the disadvantage of high cost, but still offers high control and guaranteed scale. It can be done through the delivery of the service itself, whether personal or digitised (Amazon's success is partly due to the ease and reliability of its user interface, and increasingly to the ubiquity of its name and logo in our lives). But service is often more fallible in its delivery and a bad experience of service is more damaging than a boring advert. It can be done through packaging, and through product design, as Apple has shown. And it can be done by anyone who knows how to create news, even if this involves being controversial – a core skill, like it or not, of Donald Trump.

None of this is really new. It's how brands and celebrities have grown and prospered since the time of Phineas T. Barnum. Only the range of available media continually increases, and the complexity of the synergy between them. But even a century ago there was plenty of scope for creating 'brand experiences' across multiple channels, as William Hesketh Lever demonstrated.

In the 1890s, he published the Sunlight Year book, an annual reference work and guide to life which was given away free to schools and to users who saved enough Sunlight cartons – something we should now grandly call 'content'. In 1887, Lever Bros. announced that it would give £2,000 to the "religious and benevolent institution" that most customers voted for (votes on the back of a Sunlight box only) – what we should now call 'cause-related marketing'.

When the Royal National Lifeboat Institution won, he presented them with a lifeboat called 'Sunlight Number One', and then commissioned engravings of it in a choppy sea, the nameplate highly prominent, which he sent to the Illustrated London News (from The Anatomy of Humbug).

This year's Cannes Gold Lion for 'brand experience and activation' went to Microsoft's Xbox for designing a console that could be used by the disabled. The 'Changing the game' campaign apparently achieved "\$35m of earned media" and Xbox's "social voice increased by 246%". All good publicity for the brand: but after all, the most significant marketing element of the campaign was a chunk of good old, paid-for, two minute mass TV advertising, aired during the Super Bowl (estimated cost: \$21m) – not so different, perhaps, from Mr Lever publicising his lifeboat. Is 'brand experience' a helpful concept to explain what's been done here? Or is it in danger of becoming a fashionable buzzword at the intersection of technological innovation, 'brand purpose', and that perennial blob of vagueness, 'creativity'?

But perhaps brand experience can still offer us a useful new perspective – especially for 21st-century which, it's often said, somehow play by different rules – or at least use different techniques. To explore this thought, I reflected further on a brand already mentioned – Amazon.

**Brand experience: spotlight on Amazon**  
My own 'brand experience' of Amazon comes in many, various forms. Let me adopt the format of Jeremy's imaginary brand:

*I buy a new printer, and my favourite brand of shaving soap, through Amazon: the experience is simple and seamless and the products arrive next day. But the experience is also annoying – pop-ups push me to subscribe to Amazon Prime, or to donate to charity. The website is functional but not attractive, not even completely user-friendly, though it is familiar. Amazon boxes arrive at my home, branded with the smile logo; later, I take them to the dump for recycling. I notice that the people who deliver them often seem harassed and under pressure. I read about how such people are exploited by today's 'gig economy'. I read about how Amazon are still planning to deliver by drone, and think this a terrible idea. I hear a lot about how Amazon don't pay enough taxes. Some of my friends refuse to use Amazon on principle, but I still do because it's so easy and reliable. When they send the wrong thing, it can be quickly sorted out on the phone – usually a refund with no questions asked....*

This could go on for some time – Amazon is ubiquitous and a part of my daily life. No one else's experience will be identical to mine, though I imagine many will be similar. Yet the experiences are very mixed. Practical, functional benefits are mixed with much that makes me uneasy. Oddly, I haven't even mentioned how Amazon 'personalises' my experience by recommending things. Perhaps because it's now so normal I take it for granted; perhaps because the recommendations are seldom very interesting, and sometimes bizarre. Yet it's all part of the brand experience.

Amazon, as a brand, is enormously successful to the extent that it almost constitutes a monopoly – not in the sense of an illegal cartel, but simply that its scale and efficiency mean it

has no serious rivals (outside China). But even if such rivals exist, I as a consumer never think about them.

So Amazon's dominance can once again be reduced, ultimately, to two factors: mental and physical availability. I think automatically of Amazon; I can instantly and easily buy through it. And nothing else comes close. A hundred years ago, in the United States, something similar could have been said of the Sears Roebuck Catalogue.

Jeff Bezos never assumed that his platform would dominate the market; he knew he had to work at it. Interviewed in 1997, he said, "There's nothing about our model that can't be copied over time. But you know, McDonald's got copied. And it still built a huge, multibillion-dollar company. A lot of it comes down to the brand name. Brand names are more important online than they are in the physical world."

This is refreshingly old school. Bezos didn't talk about brand values, or brand purpose, or indeed brand experience. He talked about the brand name, the trademark, the ownable thing that distinguishes Amazon from anyone else trying to offer something similar. Because frankly, any business aiming to compete with Amazon would almost certainly have values, purpose, and a set of experiences that would be pretty similar to Amazon's.

Then he says: "Brand names are more important online." OK, this was 1997 and Google was still a research project at Stanford, but he was right then and he's right today: the most important search engine is still the one in your head, even though most digitally oriented marketers seem to think targeting and getting clicks are all that matters.

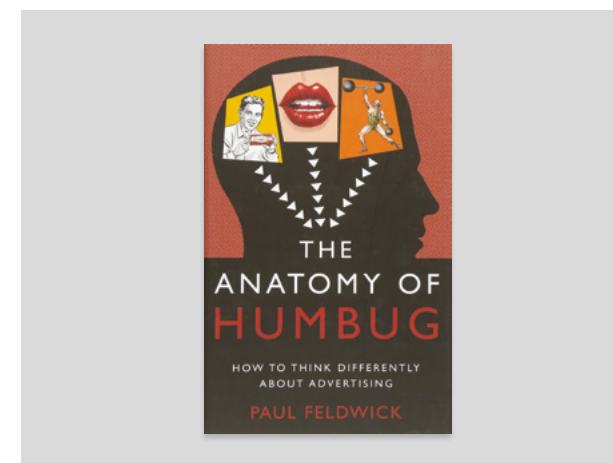


“The most important search engine is still the one in your head, even though most digitally oriented marketers seem to think targeting and getting clicks are all that matters.”

For me, the most telling chart in the 2018 AA case study that won Gold in the IPA Effectiveness Awards showed how Google searches for 'AA' collapsed over a very few years, as the brand put all its money into short-term activation. All their measures of marketing efficiency looked brilliant, but almost too late they realised their mental availability was vanishing, and they were haemorrhaging customers. Fortunately, they were able to recover by reverting to heavy TV advertising with a strong emotional appeal and a distinctive asset – a singing baby. It's an old trick but it still works!

Yes, brands need to be aware of their many 'touch points' but they must also accept that they can't control them all. That need not matter, as long as they focus on the ones that they can. Amazon flourishes despite bad PR; the AA averted disaster by following classic principles of brand advertising. But if 'brand experience' becomes a fashionable buzzword that distracts marketers from such fundamental truths, it risks doing more harm than good. ■

This article was originally published by WARC



Amazon  
AA  
The Anatomy of Humbug

# BVOD advertising has come of age



**Andrew McIntosh**  
Independent Media Consultant

BVOD is now a mass medium, with millions of highly engaged viewers watching their choice of programmes exactly when it suits them, in optimal conditions for ad effectiveness. Last summer, Enders Analysis released an overview of the BVOD market and, here, **Andrew McIntosh** draws on it to take a look at what sets BVOD apart.

## An overview of the BVOD market

In the last couple of years commercial broadcasters have radically enhanced their on-demand services, creating a powerful new BVOD advertising proposition as a result. Broadcaster VOD players are available across mobile, PCs and connected TVs, through TV platforms, smart TVs, streaming sticks and games consoles. While mobile devices have opened up a new world of BVOD viewing on the go, connected TVs now deliver 76% of BVOD viewing, illustrating viewers' preference for a large-screen experience when possible. Light TV viewers and the under-34s have taken to on-demand with particular enthusiasm.

“  
BVOD now forms a large and fast-growing slice of both the TV and online video ad markets.  
”

BVOD advertising is placed in and around on-demand TV programmes, whether live streams, catch-up, or the expanding on-demand libraries of ITV Hub, All 4 or Sky, among others. BVOD occupies the expanding overlap area of TV and online, with characteristics inherited from both: obviously it derives from broadcasters and is based around TV content so its TV credentials are rock solid, but it is also a sub-category of video on demand (VOD) in general, which includes YouTube and other online video. BVOD has become significant for advertisers due to its size, prominence, measurability and opportunities, and it now forms a large and fast-growing slice of both the TV and online video ad markets.

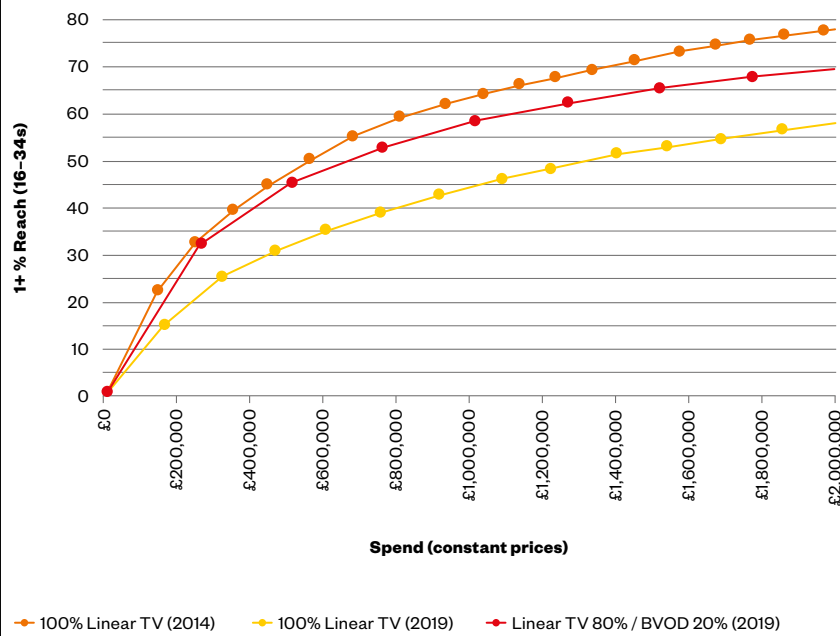


Catastrophe, Channel 4

BVOD advertising has matched its clear-cut benefit to consumers with an equally compelling commercial angle: it offers scale, reach, an attractive viewing profile, data-driven targeting and controllable delivery (e.g. frequency caps), within a high-quality, trusted advertising environment. 'Trusted' is the most important word in this list, because thanks to broadcast laws viewers can rely upon BVOD to only show acceptable creative from reputable companies. In stark contrast, in other online video environments honest advertisers can find themselves next to scammers' ads, or paying bots to 'watch', or paying for ads which are swept aside or without the audio playing.

Each of the sales houses' BVOD advertising propositions ranges from the totally straightforward (e.g. selling a certain number of impressions) to the highly sophisticated. For example, dynamic ad replacement (DAR) can deliver different ads to different devices when a broadcast TV channel is streamed via an app, or to catch-up programming on the TV set or other screens. These targeted BVOD ads deliver value to advertisers, and are sold at a premium to standard audiences.

**Campaign reach delivered across a combined linear / BVOD plan**  
16-34 cover guide



Source: BARB / K2 (Six weeks 34-39) / Touchpoints 2019 / Station average prices / Natural delivery

**The rationale for using BVOD advertising**

Agencies have said that the main motivation for using BVOD advertising until recently has been to extend the reach of TV campaigns, which have been curtailed by reductions in live linear viewing in recent years. The chart on the left uses 2019 modelled data to illustrate that, when targeting 16-34s, an 80/20 ratio on linear and BVOD achieves practically the same effect today for the same amount of budget as a 100% linear campaign did five years ago.

More recent modelling work by the sales houses suggests that putting 30-40% of a TV budget into BVOD is optimal when targeting 1+ reach of 16-34s, depending on budget size (the higher the budget, the more that BVOD can deliver 1+ reach cost-effectively).

Other reasons to use BVOD have come to the fore. For example, some buyers use it to target light viewers, others value the ability to manage frequency of exposure, and some place a premium on the pure TV distillate of BVOD programming (for good reason). Using BVOD alongside spot campaigns is now the norm rather than the exception, and it makes sense that advertisers plan across 'total TV', rather than arbitrarily restricting themselves to just one part of the whole.

Research from Thinkbox ('The Age of Television: the needs that drive us') has shown that matching creative copy in BVOD to viewers' 'need states' is effective. The idea is that people watch on demand with a different mindset to scheduled TV, and the research found that creative copy compatible with 'escape' and 'unwind' viewing states landed especially well.

In the on-demand environment consumers curate their own viewing. Heightened attention when watching on demand is therefore very likely - viewers have actively picked their very top content preference at that moment. This is borne out by viewability statistics from broadcaster research, which show BVOD view-through rates of around 97%.

Another motivation for investing in BVOD is from a trading perspective. Some youth-targeted brands are using BVOD as a cost-reducer, because it can be more cost-effective to reach 16-34 audiences on BVOD than broadcast. In combination, advertisers can obtain the reach they're after.

**Wider collaboration on metrics and audience measurement**

BVOD is a growth story of today and the foreseeable future. It will be propelled by better metrics when they become available, because advertisers want to be able to measure campaign reach

and frequency across TV and BVOD inventories combined. Delivering this to the required standard across a huge number of platforms and devices is complex.

**Conclusion**

A majority of advertisers are now planning TV across linear and BVOD, in order to maximise ad effectiveness and to benefit from the advantages of both. With the introduction of combined TV and BVOD campaign data later in 2020, and increasing use of first-party data and custom segmentation, advertiser investment in BVOD is predicted to double between 2018 and 2025. BVOD has truly come of age. ■

“ It can be more cost effective to reach 16-34 audiences on BVOD than broadcast. ”

**UK broadcasters' BVOD propositions**

| itv                                                                                                                                                                                                                                                                                                                                                                              | 4                                                                                                                                                                                                                                                                                                                                                                                     | sky   MEDIA                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>Viewed via platform EPGs and the ITV Hub app/player</li> <li>30m registered users</li> <li>14.6m monthly active users</li> <li>Audiences inc. 1st party, 3rd party data-powered, &amp; content-based segmentation</li> <li>Ads charged when served</li> <li>Adtech: Amobee (Planet V) and others</li> <li>Verified by Meetrics</li> </ul> | <ul style="list-style-type: none"> <li>Viewed via platform EPGs, the All 4 and UKTV Play app/players</li> <li>21m registered users (All 4)</li> <li>11.7m monthly active users</li> <li>Audiences inc. 1st party, 3rd party data-powered, and interest-based segmentation</li> <li>Ads charged when served</li> <li>Adtech: Freewheel and others</li> <li>Verified by MOAT</li> </ul> | <ul style="list-style-type: none"> <li>Viewed via Sky EPG, 'push' VOD and the Sky Go &amp; My5 players</li> <li>12m registered users (Sky)</li> <li>14.1m monthly active users</li> <li>Audiences inc. 1st party, 3rd party data-powered, &amp; content-based segmentation</li> <li>Ads charged when 75% viewed</li> <li>Adtech: Freewheel and others</li> <li>Verified by MOAT</li> </ul> |

Source: IPA Touchpoints; broadcasters

**BVOD has a range of appealing commercial characteristics:**

- Premium environment - known content in the shape of long-form programming, and relatively short ad breaks
- A mass medium - viewed by 17 million people each week on average (BARB)
- High-quality audiences - younger and lighter viewers are well represented
- 76% viewed on main TV sets, so watched full screen and with the sound on
- Controllable delivery - precise targeting, with frequency control and capping
- A reputable, brand-safe, strictly regulated medium - compare the many ongoing concerns about online advertising
- Trusted measurement - existing metrics are produced by independent suppliers, with third-party verification possible, and further industry developments are expected within months
- Advertising effectiveness - recent research from the Group M study 'Demand Generation' commissioned by Thinkbox suggests that dependent on category, BVOD should account for 8% to 27% of TV investment, in order to maximise ad-driven profit return.

# Planning for the next decade



**Vicky Fox**  
Chief Planning Officer, OMD

As we move into a new decade, OMD's **Vicky Fox** reflects on how and what advertisers now need to factor into their TV plans.

When I started TV planning there were only two channels to consider and trading happened TV region by TV region. But the power of the schedule was unmistakable, and I once made the rookie error of scheduling a launch spot against Children in Need on the Beeb. Didn't ever do that again.

Much has changed across the TV landscape, making it an incredibly exciting place for the art and science of planning, but one thing still holds true, and that is the power of programmes.

Still the nation's favourite pastime, people love watching TV shows so much that they spend more than three hours a day, on average, doing so. Then they love talking about them, on and off-line, over dinner, in the playground, on social media and, yes, even by the water cooler. The effectiveness of immersing our advertising in entertaining content has been evident for many years.

Now, when we put plans together, the building blocks of reach and frequency still apply, but there's so much more in our TV tool kit to consider.

Here are 'six of the best' new aspects of TV planning that we should all be factoring in.

### 1) Broadcaster VOD

With most BVOD viewing now happening on the main screen, and set-top boxes able to blend schedules seamlessly, most viewers wouldn't be able to tell if they were watching from their planners or from a catch-up service. But wherever you watch your TV content, the real benefit of BVOD is to advertise to an engaged audience and control the pacing of that delivery with frequency-capping. BVOD is now a true complement to broadcast TV campaigns; improving reach, balancing frequency distribution, and for some younger audiences it can even be cheaper than linear alone.

### 2) Addressability

The ability to target households against a huge range of audience definitions has evolved from hyper targeting for smaller budgets to a valuable add-on to bigger brand campaigns. Recent development of AdSmart from Sky now enables us to target light viewers directly and extend cost-efficient reach of a campaign. These types of blended campaigns have been very effective for several of our clients – including Barclays and McDonald's – particularly when in-week reach is a primary objective.

### 3) Responsive planning

Television viewing is dynamic and evolves as campaigns play out. There are two in-flight optimisation techniques that buyers use to ensure the most effective delivery. If campaign goals are reach-based, we can isolate non-viewers in BARB and create a programme hitlist mid campaign to extend coverage. And if campaign goals are measured against actions, we can use regression analysis and other statistical techniques to evaluate schedules against real-time search or onsite behaviour to identify trends in performance.

### 4) Partnerships

Broadcasters are more willing than ever to help advertisers get closer to content and capitalise on the power of programmes. Partnerships now range from sponsorships through to talent arrangements, on-air integrations and licensing. Successful campaigns deliver not just creative solutions but hard business results. A great example of this was the partnership between Misguided and Love Island. Working with ITV, the fashion retailer updated the Love Island app every day with what the Islanders were wearing, allowing viewers to shop the Love Island wardrobe.

### 5) Data

Using more sophisticated data sets has enabled planners to evolve the role of TV to tackle new types of campaigns. Across the linear and BVOD landscape, custom audience matching is an incredibly effective targeting technique. Whether you are targeting existing customers with annual servicing and renewal messages or identifying new segments to target, it's clear that TV's ability to combine a high-quality viewing environment with bespoke targeting is very powerful.

### 6) Context

Channel 4's context research in 2018 was able to prove what planners had thought for a while; that those exposed to an ad contextually were twice as likely to remember seeing it compared to those who saw it in a regular placement. Delivering context into campaigns is a labour of love, from McDonald's McCafé Moments in 2015 to the recent Tesco's 100 Years TV campaign. Ad content is filmed to reflect key shows, and spots are then handpicked to enhance the campaign message. Campaign planning can now also be enhanced by artificial intelligence, identifying the key scenes that can deliver context. This takes us way beyond the obvious shows and into an exciting world of contextual possibilities.

TV is enormously powerful – always has been – it's just that it is now more flexible and sophisticated than ever before. Not only does this make for a broader and richer canvas for creative media thinking, it also brings fresh ways to drive significant value for our clients, which is, after all, what we're here for.

Welcome to 'The Decade of TV Planning', in which the difference between a good plan and great plan will be greater than ever. I can't wait. ■

“The building blocks of reach and frequency still apply, but there's so much more in our TV tool kit to consider.”

Barclays





# A year of excellence



And the winners were...

# The Thinkboxes 2019

The Thinkboxes have been running for 12 years. If you cast your mind back, you'll realise a lot has changed over those 12 years. But what hasn't changed is the high calibre of TV advertising that has adorned our screens. The Thinkboxes recognise and honour this brilliant creativity and the people behind it.

The awards showcase the trust between agency and advertiser, as well as celebrating the fundamental role of the client in the creative partnership. The Thinkboxes are judged by a panel of very talented people who make up the Thinkbox Academy. 2019 was a stellar year again for brands that aimed to inspire, engage and make us laugh. The winners were...



## January/February 'Politics Tamed', The Times & The Sunday Times

**Client** Lynne Fraser  
**Agency** Pulse Creative  
**Director** William Bartlett  
**Creative Team** Robin Garton, Paul Alderman, Andy Peel, Jodie Jenkins,  
**Production Company** Framestore Pictures

The territorial divisions within 'Westminster Zoo' unfold quite literally as animals heckle and bray in the House of Commons, with a soundtrack that includes the Dr Dolittle song, Talk to the Animals.



The best TV ads are as iconic as the best TV programmes and create great bonds between consumers and brands. A great TV ad makes the hair on the back of your neck stand up. This idea did just that.

**Catherine Newman**  
Chief Marketing Officer, The Times and Sunday Times



If an ad can work as a single visual, that's an indication your idea is clear from the start.

**Robin Garton**  
Executive Creative Director, Pulse Creative London

## March/April 'We Make Gin, Not Compromises', Sipsmith

**Clients** Sam Galsworthy, Jared Brown, Fairfax Hall  
**Agency** Ogilvy UK  
**Director** Jeff Low  
**Creative Team** Jules Chalkley, Giles Montgomery, Lotte Jeffs, Ilka Mourao, Jonny Durgan  
**Production Company** Biscuit Filmworks

Mr. Swan – the brand's icon, inspired by the shape of the necks on its gin stills – guides us through the company's approach to small-batch gin distilling and discusses what makes Sipsmith different.



Not only is stop-motion animation a distinct and engaging way to tell our story, it is a labour-intensive and very skilled process that doesn't allow for corners to be cut – and that's our approach to making gin.

**Kate Moorcroft**  
Global Marketing Director, Sipsmith



## May/June 'Very Fast Chair', Virgin Trains

**Client** James Rawlinson  
**Agency** Anomaly  
**Director** Keith Schofield  
**Creative Team** Ben Robinson, Mike Whiteside, Oli Beale  
**Production Company** Caviar

A man's imagination runs away with him – all the way to Wigan, in fact – as his park bench acquires wheels, Wi-Fi, toilets and food service, finally morphing into a Virgin Train in this surreal and comical spot.



TV is the channel that delivers our strongest ROI and we find tens of thousands of new customers register their interest with us whenever we are on air, so it is also a great acquisition tool.

**James Rawlinson**  
former Interim Marketing Director, Virgin Trains



The truth is more powerful than anything, and the truth is that a train is a 125mph chair with crisps and the internet and waiters and toilets attached to it. After that divine inspiration, the script wrote itself.

**Mike Whiteside**  
Creative, Anomaly



### September/October 'Mind Control', Marmite

**Client** Fik Woldegiorgis  
**Agency** adam&eveDDB  
**Director** Martin Granger  
**Creative Team** Matt Fitch, Mark Lewis, Andre Sallowicz and Simon Vicars  
**Production Company** Moxie Pictures

Marmite haters take part in a hypnotic mind-control experiment to try to turn them into fans; the ad captures their comedic reactions and continues Marmite's long-established essence of "love it or hate it."



For an iconic brand like Marmite that enjoys broad-based appeal, the key marketing objective is to reach as many people as possible, build strong memory structures and create lasting impact.

**Fik Woldegiorgis**  
Brand Experience Director, Unilever



### July/August 'Calm Before the Storm', Lotto

**Clients** Hayley Stringfellow, Rachel Moss, Arabella Gilchrist  
**Agency** adam&eveDDB  
**Director** Henry-Alex Rubin  
**Creative Team** Richard Brim, Ben Tollett, Dan Bailey, Brad Woolf, Emily Tolley and Stevie Rowing-Parker  
**Production Company** Smuggler

The anticipation of the Lotto draw in a Camelot call centre is brought to life, ending on a real call from a genuine, delighted winner – and reminding the audience that every day, people are having their lives changed by the National Lottery.



A simple narrative leaves room for emotional impact, humour, or whatever else it needs to connect with viewers.

**Dan Bailey**  
Copywriter, adam&eveDDB



When our TV ads are truly entertaining, people feel differently about our brand.

**Hayley Stringfellow**  
Head of Brand Strategy and Marketing, Camelot



### November/December 'Silence the Critics', IKEA

**Client** Kemi Anthony  
**Agency** Mother  
**Director** Tom Kuntz  
**Creative Team** Mother  
**Production Company** MJZ

IKEA and grime collide when a family, fearful their home isn't stylish enough for guests, find their internal self-criticisms voiced by the questionable ornaments they've let take over their lives.



Safe doesn't really do it for me. I'm never comfortable when I'm totally comfortable with an idea.

**Kemi Anthony**  
Marketing & Communications Manager, IKEA



Everyone poured a lot of love into it – it was a real team effort.

**Thom Whitaker**  
Creative Director, Mother



# More TV brilliance from The Thinkboxes

The eventual winners of The Thinkboxes had to fight for their crowns. They emerged from incredible shortlists and it would be remiss not to give credit to the creative gems that almost won. We give you the runners-up...

## January/February



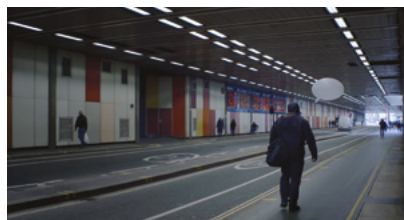
**Guinness, 'The Purse'**  
AMV BBDO



**IKEA, 'Tonight is sleep'**  
Mother



**ITV & Veg Power, 'Eat Them to Defeat Them'** adam&eveDDB

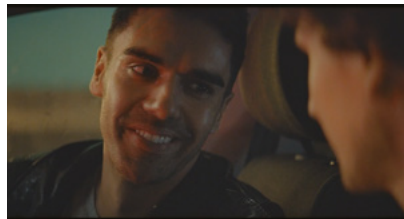


**Truth Project, 'Speech Bubbles'**  
MullenLowe London

## March/April



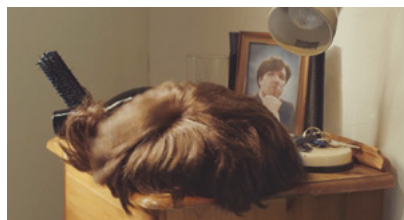
**British Heart Foundation, 'Boy'**  
MullenLowe London



**Citroën, 'First Dates'**  
Havas London



**Argos, 'So stylish you can wear it'**  
The&Partnership



**Irn Bru, 'Hairdo'**  
The Leith Agency

## May/June



**Lucozade, 'Three Lionesses'**  
Grey London



**Stroke Association, 'Heads'**  
AMV BBDO



**Warburtons, 'GoodBagels'**  
Engine



**Walkers, 'Best Ever Fan'**  
AMV BBDO

## July/August



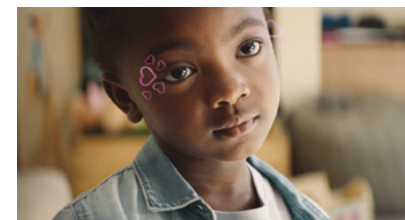
**Taylors of Harrogate, 'Why didn't we think of them before?'** Lucky Generals



**Vodafone, 'Be Unlimited'**  
Ogilvy UK



**McCain, 'Differences'**  
adam&eveDDB



**McDonald's, 'Negotiation'**  
Leo Burnett London

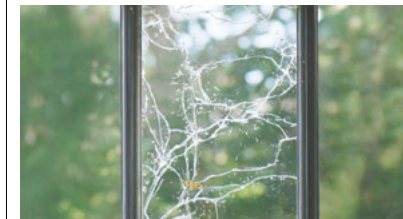
## September/October



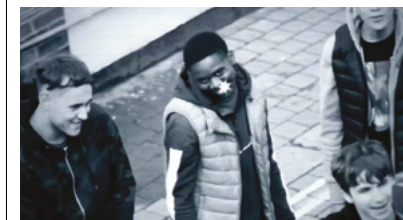
**Cadbury Dairy Milk, 'Fence'**  
VCCP



**Churchill, 'Chill'**  
Engine



**The Guardian, 'Hope is Power'**  
Uncommon



**National Citizen Service, 'No We Can'**  
Karmarama

## November/December



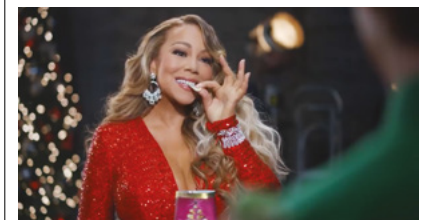
**Argos, 'The Book of Dreams',**  
The&Partnership



**John Lewis & Partners and Waitrose & Partners, 'Excitable Edgar'** adam&eveDDB



**Marks & Spencer, 'Go Jumpers'**  
ODD London



**Walkers, 'All Mariah Carey wants this Christmas'** AMV BBDO

# Thinkbox TV Planning Awards 2019

The TV Planning Awards honour the crème de la crème of TV planning, and 2019 saw a record number of entries jostling for the top prizes. With every corner of TV's capabilities explored and hard proof that TV delivers the goods for brands, the 20 shortlisted campaigns had it all. Our esteemed judges had the unenviable job of choosing the winners, but they chose well, as you are about to discover.

## Grand Prix & Best ongoing use of TV Tesco: A TV Love Story, MediaCom UK for Tesco

Tesco was facing pressure from all sides and a huge marketing challenge: to convince shoppers to choose, not just use, Tesco again. They needed to rebuild their reputation and tackle the key driver of store choice – quality – which was Tesco's lowest attribute.

An immediate hard correction was required to rebalance years of short-term tactical erosion. MediaCom knew TV would be central to this strategic shift due to its ability to drive very large business effects.

Phase one revived "Every Little Helps" with a new family to emphasise Tesco's helpfulness. Phase two launched "Food Love Stories", a fully integrated brand platform celebrating the food we love to make, for the people we love.

TV gave unmatched scale and consistent salience to the plan, while also helping Tesco achieve number one share of voice in the highly competitive grocery market. It also allowed MediaCom to test, learn and optimise, including using Sky's AdSmart addressability, Channel 4's AI ad placement, and contextual and talent partnerships with ITV.

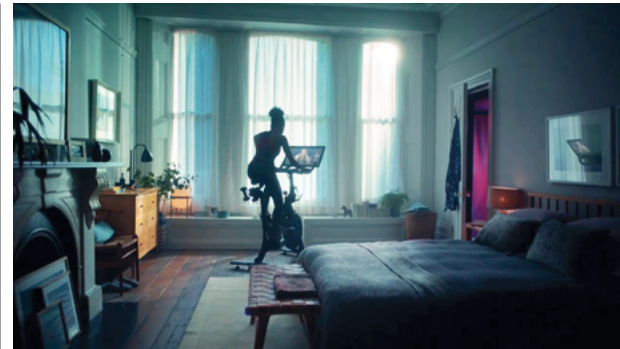
Ongoing TV has revitalised the brand, driving even greater profits and ROI year-on-year and, critically, improving Tesco's quality score by three-quarters. Tesco delivered 12 quarters of sales growth and customers are returning.

Truly a TV love story.

### SHORTLIST

- MediaCom UK** Direct Line (Highly Commended)
- Manning Gottlieb OMD** Age UK
- Wavemaker** Nationwide





**Best low budget use of TV**  
**Reinventing an iconic brand through TV advertising, Pintarget for SodaStream**

SodaStream is an iconic brand with very modern technology which substantially reduces single-use plastic bottles and offers a cheap source of sparkling water. But it was struggling to get significant high-street distribution.

Pre-Christmas 2018, a valuable opportunity arose to test in 80 Boots stores. But, with only four weeks to come up with a campaign, they were up against it.

Pintarget recommended hyper-local TV, using Sky AdSmart technology to target high-opportunity audiences close to specific stores. This would give the brand stature, delivering a national weight branding campaign but only in areas where there was distribution of the product.

Local cinema, VOD, social media, mobile display and escalator panels in London areas helped cover the customer journey around the stores.

The TV campaign created brand awareness and purchase intent that didn't previously exist, helping an iconic brand to overdeliver on sales targets and secure valuable long-term distribution with Boots. SodaStream rediscovered its fizz and is now a committed TV advertiser.

**SHORTLIST**

**Alchemy Media** Auchlochan Garden Village  
**WM Select** Vagisil

**Best newcomer to TV**  
**Launching Peloton in the UK, Essence for Peloton**

Peloton is reinventing fitness by bringing the benefits and energy of studio-style workouts to the home.

After huge success in the US, Peloton set its sights on the UK, and several challenges quickly became clear: Peloton was a niche brand and a new concept at a high price point, it was unknown in the UK, and it was in a hugely competitive market.

Essence's strategy was to find the Peloton audience within mass market TV programming, delivering maximum awareness and reach and driving word-of-mouth advocacy.

The plan was built around high-rating programmes likely to provide 'water cooler' moments. Linear TV reached a mass audience, while BVOD and addressable TV delivered niche targeting. Paid search and social synched to TV spots harvested interest generated by TV.

The launch delivered record-breaking call volumes and web traffic. Bike sale targets were beaten by 12% and awareness targets by 20%. Thanks to TV, Peloton was riding high.

**SHORTLIST**

**Total Media** Carabao  
**VCCP Media** Vinted

**Best use of TV and...**  
**Missguided Styles Love Island, MediaCom UK for Missguided**

Since TV started, viewers have wanted the outfits worn by the stars of their favourite shows. In Summer 2018, fashion brand Missguided made 'getting the look' easier than ever: partnering with smash-hit reality show Love Island to provide ALL the outfits worn by the contestants.

Working with ITV, MediaCom created a fully activated campaign featuring everything from programme sponsorship, product placement, BVOD and talent, to brand and product spots placed around the show.

Knowing the audience would multi-screen throughout the live shows, MediaCom worked hard to connect the TV activity to Instagram and Facebook where fans could win tickets to the Live Final in Majorca, browse 'get the look' product shots or just join in with the huge buzz around the show.

And, to cap it all, with a few clicks on the official Love Island app, viewers could buy every outfit as they watched, turning the show into a Missguided catwalk, and the app into their shop window.

From day one of the series, the featured items sold out as Missguided sales rocketed – up 40% thanks to the partnership.

**SHORTLIST**

**OMD UK** Barclays  
**PHD and adam&eveDDB** Volkswagen T-ROC  
**UM Manchester** Aldi

**Best use of content**  
**Nationwide & Channel 4: Together Against Hate, Wavemaker for Nationwide**

Nationwide's core values are about putting people first and the currency of kindness. So, when the real people in their TV ads, particularly those from diverse backgrounds, started receiving online abuse, they felt they must do something.

Nationwide challenged Wavemaker to produce a campaign highlighting the scale of online abuse, to motivate people to change their behaviour.

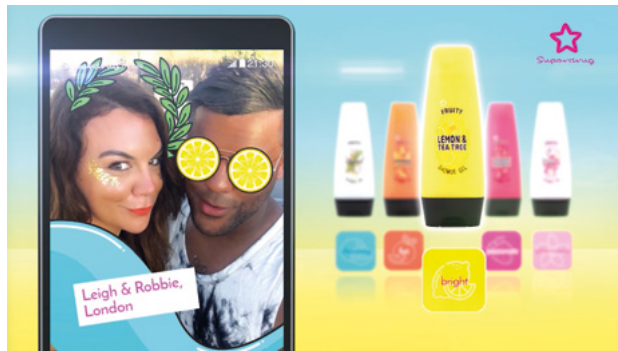
The 'Together Against Hate' campaign launched with an ad-break takeover in Gogglebox. Starting with a special channel announcement, it featured a Nationwide ad alongside spots from Maltesers and McCain – ads where the people in them had suffered similar online abuse.

Each ad had a bespoke overlay detailing the real online abuse the people had received. Viewers were encouraged to question why online abuse isn't taken seriously and were directed to the support page.

Channel 4's research ranked the campaign as their most impactful ever.

**SHORTLIST**

**MediaCom UK** Berocca  
**Vizeum** TSB



**Best use of sponsorship**  
**Coupling up with Love Island,**  
**Mindshare for Superdrug**

Superdrug tasked Mindshare with crafting a media partnership to keep its brand at the forefront of millennials' minds for the duration of the key summer months.

Partnering with Love Island on ITV2 offered eight weeks of daily brand building support for Superdrug in an ideal environment with the perfect audience.

Product placement put Superdrug at the heart of Love Island, whilst licensing rights enabled Superdrug to use the Love Island logo and imagery. Activity included daily content on social media, blog posts and weekly videos of behind-the-scenes footage.

Amplification was extended across press, magazines, radio, online display, in-store events and point of sale material. They even created exclusive cosmetics bags and gifting sets featuring Love Island branding.

As a result of this fully integrated sponsorship, Superdrug saw a return on investment of £2.76 for every pound spent.

**SHORTLIST**

**Arena Media** Emirates

**Special award:**  
**Best innovation**  
**Unlocking light viewers with**  
**AdSmart, OMD UK for Barclays**

Linear TV has been fundamental in maintaining Barclays' brand consideration and market position. But, with increasing amounts of on-demand viewing, reach is proving harder to build using broadcast alone. It was clear that their AV strategy had to evolve.

OMD brought together Barclays and Sky to run a media first, unlocking light TV viewers on AdSmart. After the first six-week test campaign, they saw fantastic results, adding incremental cover for light viewing ABC1 Adults, thereby maintaining Barclay's 'in week' share of voice without having to increase their TVR weight on linear.

This innovative approach, blending the might of broadcast TV with a data-fuelled addressable solution, saw Barclays move to first place in spontaneous consideration within their category. And with brand consideration tantamount to business results, this was a huge triumph for the new AV strategy and for Barclays.

**Special award:**  
**Best collaboration**  
**Rammed with Confidence,**  
**PHD & adam&eveDDB for**  
**Volkswagen T-ROC**

To launch a car designed to make drivers feel more confident, PHD and adam&eveDDB delivered an integrated launch strategy centred on the T-ROC's core product benefit.

'Rammed with Confidence' saw Bam the Ram – the star of the T-ROC's launch ad campaign – confidently burst out of VW's advertising and 'ram' his way into the ads of other brands across every medium used.

But, with a broad target audience, TV was the only channel which could deliver the scale and storytelling ability required for the campaign to make sense in every medium. They launched the T-ROC with a partnership across Sky's channel portfolio featuring special ad breaks in which Bam rammed into the ads of Admiral and Virgin Atlantic before his own T-ROC ad was revealed.

With Bam's confidence established through TV, he then went on to burst into other brands' ads across print, out-of-home, digital display and social. The campaign utilised the individual strengths of each channel, but it was the fame-driving strengths of TV that fuelled the T-ROC's ability to smash the drab category norms.

Despite UK car sales declining by 12% during its launch period, the VW T-ROC became the UK's most successful small SUV launch for seven years.

**The Judges**

**Emily Fairhead-Keen**  
 Strategy Partner, Wavemaker

**Gavin Taylor**  
 VP Media Planning, Viacom UK

**Gen Kobayashi**  
 Head of Strategy, Communications, Ogilvy

**Gideon Spanier,**  
 UK Editor-in-Chief, Campaign

**Kathi Hall**  
 Head of Content Strategy & Brand, Age UK

**Katie Mackay-Sinclair**  
 Partner, Mother London

**Kerry Chilvers**  
 Brands Director, Direct Line

**Lee Baring**  
 Head of Agency Trading, VCCP Media

**Lindsey Clay**  
 Chief Executive, Thinkbox

**Mike Florence**  
 Chief Strategy Officer, PHD

**Murray Calder**  
 Chief Strategy Officer, MediaCom Edinburgh

**Nick Hirst**  
 Executive Strategy Director, adam&eveDDB

**Peter Duffy**  
 Interim Chief Executive Officer, Just Eat

**Rachel Bristow**  
 Former Partnerships Director, Sky Media

**Richard Morris**  
 CEO, Initiative

**Rufus Radcliffe**  
 Chief Marketing Officer and Director of Direct to Consumer, ITV

**Tess Alps**  
 Chair, Thinkbox

**Tom Roach**  
 Executive Strategy Director and Head of Effectiveness, adam&eveDDB

**Zoe Harkness**  
 Head of Planning, Thinkbox



# How can we help?

# And finally...

You might have a few questions, which is lucky, because we've got answers.



**That was interesting. What do I do now?**

Be kind. Recycle. Keep supporting your lovely neighbours and the brands you represent so brilliantly. And you could do worse than head over to [Thinkbox.tv](http://Thinkbox.tv), your handy Aladdin's cave of TV treasures. We're talking research and insight, the latest TV viewing stats, nickable charts, top-class TV creative, inspiring films and a sizeable bank of brand case studies to download for free.

**How do I keep up with your latest stuff?**

Pop along to [Thinkbox.tv/register](http://Thinkbox.tv/register) and sign up for 'Thinkbox in your Inbox', our fortnightly newsletter packed with insight and inspiration from the world of TV. You'll be first in line to hear about our latest research, news, opinion and upcoming events.

**But what if I wanted a more birds-eye view of the world of TV advertising?**

Well you're in luck. We'll soon launch our brand-new online training course (you may have read about it on page 60) where you can up your TV chops all from the comfort of your screen.

**What if I'm after something a bit special?**

Then why don't we put something together just for you? We can present to your team on a TV topic of your choice in person (Government advice permitting) or through the magic of video conferencing at a time that suits you. In 2019 we did 277 presentations: it's something we love doing and it's good to make new friends. Whether you just want to get under the skin of our latest research or would like something more bespoke put together, do get in touch at [research@thinkbox.tv](mailto:research@thinkbox.tv) and let us know what kind of thing you're after.

**I've got a bit of time on my hands. Any suggestions?**

We've got just the thing. Try our Demand Generator tool at [Thinkbox.tv/demandgenerator](http://Thinkbox.tv/demandgenerator). It helps you calculate your optimal media mix based on your business type and size. Drop a few numbers in and away you go. Hours of fun right there.

**Is this the end now?**

Almost.

**Actually, I've still got a few questions that I'm not prepared to share in a publication like this.**

Luckily, we've got a dedicated bunch of friendly people who can help with that. Advertising-related questions, that is. You can reach them at [planning@thinkbox.tv](mailto:planning@thinkbox.tv) or on 020 7630 2320.

**Thank you. You've been very helpful.**

You're very welcome. ■

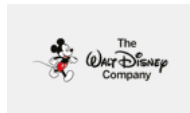


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- ▶ Big Little Lies, Sky Atlantic
- ▶ The Masked Singer, ITV



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