

The year in numbers

All the facts, charts and numbers that tell you the TV story for 2018
p.08

Televisionaries

Marketing enlightenment from Binet & Field, Gideon Spanier and Matt Hill
p.30

A year of excellence

Award-winning TV planning, stand out ad creative and IPA effectiveness winners
p.42

A year in TV

Thinkbox Annual Review 2018-19



thinkbox

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Welcome

From Lindsey Clay



TV viewing is changing. You know this; you watch it differently from how you used to. You probably enjoy it even more too. Viewers have never had it so good. And you know that change brings challenges of course. As some live TV viewing is redistributed into on demand, broadcasters and advertisers are adapting. You are likely adapting too.

But, amidst the change, let's not lose sight of the facts – TV advertising accounts for 94.6% of the video advertising people actually see (see page 22) and 71% of the profit generated by advertising, according to Ebiquity and Gain Theory. Nonetheless, we must do things differently to make the most of the world's most effective advertising. We need to have a total TV approach. Live TV continues to fulfil crucial roles in our viewing life – see MTM's 'Age of Television' research on page 18 – but as viewing patterns change, it is fundamental that advertisers use Broadcaster VOD hand in hand with linear TV advertising (see page 24). The coming pages are packed with insight and I won't steal their thunder with any more page signposting. So, I'll keep it brief, and take this opportunity simply to thank Thinkbox's incredible shareholders for their continuing support, the brands who make fantastic TV advertising (oh go on then, see page 44), and the wonderful people from across the ad industry who have contributed to this review. I hope you enjoy it – and if you want even more, just get in touch. ■

Lindsey Clay

Lindsey Clay Chief Executive, Thinkbox

If you read one bit, read this

Time-poor but still want to be bang on point about what's happening in TV? This is the section for you.

TV ad revenue in the UK in 2018 totalled £5.11 billion

This matched investment in 2017 – no mean feat considering the economic backdrop. You can take a closer look at the numbers and the highest spenders on page 25.

BVOD is now a necessity, not a luxury

As viewing re-distributes between linear and BVOD (Broadcaster VOD), so TV advertising must too. TV's reach is undiminished when you embrace total TV (see page 24).

Online brands love TV

Campaign's Gideon Spanier looks at why online brands like Just Eat, Amazon, GoCompare and Eve Sleep are investing so much in TV advertising. As Richard Morris, UK Chief Executive of Initiative, says: "TV provides three things: it's effective, accountable and it imbues trust on the brands that use it." (See page 38.)



Britain's Got Talent, ITV

We're a needy bunch

New research by MTM found that, whenever we watch TV or video, we are doing so to satisfy one or more of eight different needs. It found that live TV is most popular for all but one need, and it helped explain why different forms of TV and video happily co-exist in our lives (see page 18).

There were 867 new or returning advertisers on TV in 2018

This represents all the brands that have either tried TV for the first time or returned to it after a gap of at least five years. Among them were Vinted, Square and Peloton cycles.

Facebook video isn't growing

In 2017, video viewing on Facebook accounted for 1.1% of total video viewing. In 2018 it was 1.2%. This compares with TV, which accounts for 69% of all video viewing. See page 16 for our full video analysis. ■

What did the industry watch in 2018?



DAN CLAYS
OMD

What was your favourite TV moment of 2018?

ITV. July 3rd. Around 9.30pm. Along with more than 24m others. A moment best summed up by commentator Clive Tyldesley. "Yeeeeeees! England are World Cup quarter-finalists again! And they've done it on PENALTIES."

What is your TV guilty pleasure?

First Dates on Channel 4. First Dates Hotel was an excellent addition!

Best TV discovery in 2018?

Save Me. Brilliant home-grown drama on Sky Atlantic. Lenny James take a bow. Sky released all six episodes at once. It took us a weekend to watch. I think around 700,000 did the same.

What's your favourite SVOD show?

I would have said Narcos and Ozark, but Homecoming might have just trumped them.

Which TV character would your colleagues say you are?

If only it was Jed Bartlet (The West Wing). More likely Phil Dunphy (Modern Family). And Troels Hartmann (The Killing) on a good day for a lookalike.



ANDY NAIRN
LUCKY GENERALS

What was your favourite TV moment of 2018?

Rahul's victory in GBBO.

What is your TV guilty pleasure?

First Dates.



1 Homecoming, Amazon Prime

2 The Great British Bake Off, Channel 4

3 Save Me, Sky Atlantic

4 2018 FIFA World Cup, ITV

5 First Dates, Channel 4

Best TV discovery in 2018?

Stath Lets Flats.

What's your favourite SVOD show?

Sneaky Pete.

Which TV character would your colleagues say you are?

Sadly, a cross between Rab C Nesbitt and Karl Pilkington.



KAREN BLACKETT
WPP

What was your favourite TV moment of 2018?

The Royal Wedding (Harry and Meghan). Specifically seeing the Kingdom Choir and Sheku perform. Also the American Pastor and the faces of the Royals as he really got going...

“I am an old romantic, and fascinated by reality shows that try to create environments for love to blossom.”

What is your TV guilty pleasure?

I am an old romantic, and fascinated by reality shows that try to create environments for love to blossom, even when it is so ridiculous; Love Island and The Bachelor or Bachelorette. Currently hooked on Rachel Lindsay's season!

Best TV discovery in 2018?

This Is Us – been in floods of tears.

What's your favourite SVOD show?

Has to be Game of Thrones.

Which TV character would your colleagues say you are?

Lisa Simpson (I am not sure what that means) or Olivia Pope (Scandal) apparently!?



1 The Bachelorette, ITVBe

2 Game of Thrones, Sky Atlantic

3 Vikings, Amazon Prime

4 Gogglebox, Channel 4



MARK EVANS
DIRECT LINE GROUP

What was your favourite TV moment of 2018?

Michael Curry's speech at Harry and Meghan's wedding. Had me in stitches for all the wrong reasons.

What is your TV guilty pleasure?

Gogglebox. It's the ultimate slice of life.

Best TV discovery in 2018?

Luther. Laggard I know but envy my binge.

What's your favourite SVOD show?

Vikings, Amazon Prime.

Which TV character would your colleagues say you are?

Maybe Ragnar Lothbrok from Vikings but without the beard.

“Gogglebox. It's the ultimate slice of life.”





JOSH KRICHEFSKI
MEDIACOM

What was your favourite TV moment of 2018?

First episode of Patrick Melrose.... BANG! Benedict Cumberbatch made me feel very dizzy but I was blown away by the originality of what I was seeing on my TV screen. It felt brave, honest, hilarious, deeply distressing and genuinely original. It was a rare example of the screen version being better than the book in my view.

What is your TV guilty pleasure?

I watched every single episode of Love Island this year. I don't normally go for reality TV but my brother had been taken ill and it was the only thing that I could genuinely switch off to.

Best TV discovery in 2018?

Damson Idris in Snowfall on BBC. He is a British star in the making.

What's your favourite SVOD show?

Ozark.

Which TV character would your colleagues say you are?

Sheriff Jim Worth from Tin Star (apparently).

“Benedict Cumberbatch made me feel very dizzy.”



- 1 Tin Star, Sky Atlantic
- 2 Ozark, Netflix
- 3 I'm A Celebrity... Get Me Out Of Here!, ITV
- 4 Patrick Melrose, Sky Atlantic
- 5 Love Island, ITV2



CHAKA SOBHANI
LEO BURNETT

What was your favourite TV moment of 2018?

Harry Rednapp winning I'm A Celeb.

What is your TV guilty pleasure?

Celebrity 5 Go Motorhoming – there are no words.

“Celebrity 5 Go Motorhoming – there are no words.”

Best TV discovery in 2018?

The Bold Type. Such joy and frivolity is much needed.

What's your favourite SVOD show?

Anthony Bourdain: Parts Unknown. Delicious in every way. Makes the heart, head and stomach hungry for more.

Which TV character would your colleagues say you are?

I'd love to think Buffy The Vampire Slayer. But probably more Danny Baker.



MICHELLE MCETTRICK
TESCO

What was your favourite TV moment of 2018?

I was in Prague with our International Marketing Directors for a quarterly meeting which happened to fall on the day of the England v Colombia match. All our elaborate plans for sampling the local cuisine after a long day of meetings disintegrated into an increasingly desperate search for a sports bar showing the match. At last we found one and were rewarded by seeing England finally triumph in a World Cup penalty shoot-out, securing their spot in the quarter finals. Pretzels and beer never tasted so good.

What is your TV guilty pleasure?

Soap operas disguised as courtroom dramas. The Good Wife, Suits, pretty much anything in the genre will have me glued to the set if I ever have a night alone with full control of the remote.

Best TV discovery in 2018?

Killing Eve.

What's your favourite SVOD show?

I'm currently hooked on The Americans. Midway through season 2.

Which TV character would your colleagues say you are?

An oldie but a goodie. I've often been compared to C.J. Cregg from The West Wing.

“I've often been compared to C.J. Cregg from The West Wing.”



- 1 The Good Wife, More 4
- 2 The Chase, ITV
- 3 Derry Girls, Channel 4
- 4 House of Cards, Netflix



JENNY BIGGAM
THE7STARS

What was your favourite TV moment of 2018?

January 26th – when six of the BBC's male presenters agreed to take pay cuts to help address the BBC's gender pay gap. Or – Murdoch losing the battle for Sky. Or – Maureen Lipman joining Coro.

What is your TV guilty pleasure?

Soooo many to mention – Coronation Street, The Chase, Saturday Kitchen, Top of the Pops 1984.

Best TV discovery in 2018?

Save Me (best thing ever on Sky One), Derry Girls on Channel 4.

What's your favourite SVOD show?

It's not very PC but House of Cards.

Which TV character would your colleagues say you are?

Frank Underwood.



The year in numbers

The changing media landscape

In the next section, we'll look at how TV viewing is changing and why. But before we do that, we need to appreciate where TV now sits within the wider media landscape.

Media time is growing

Back in 2012, the average person in the UK spent 557 minutes a day with any media, according to the IPA's invaluable Touchpoints data. By 2018, this had increased to 733 minutes; that's just shy of 3 hours more media time a day. This growth has been driven predominantly by communications – e.g. social media and messaging.

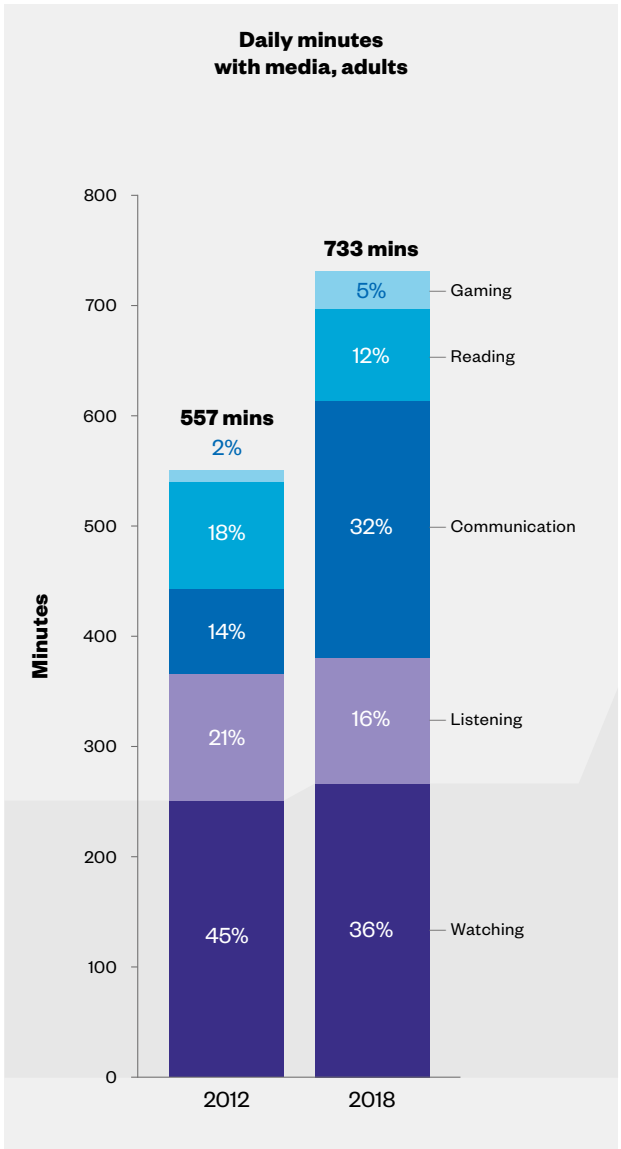
Video is growing

Video time has accounted for some of this increase, up from 248 minutes in 2012 to 261 minutes in 2018. Touchpoints shows that linear TV remains overwhelmingly the largest component, but that some linear viewing time has redistributed across on-demand services, not all of which offer advertising opportunities (e.g. Netflix).

Not all media time is advertising time

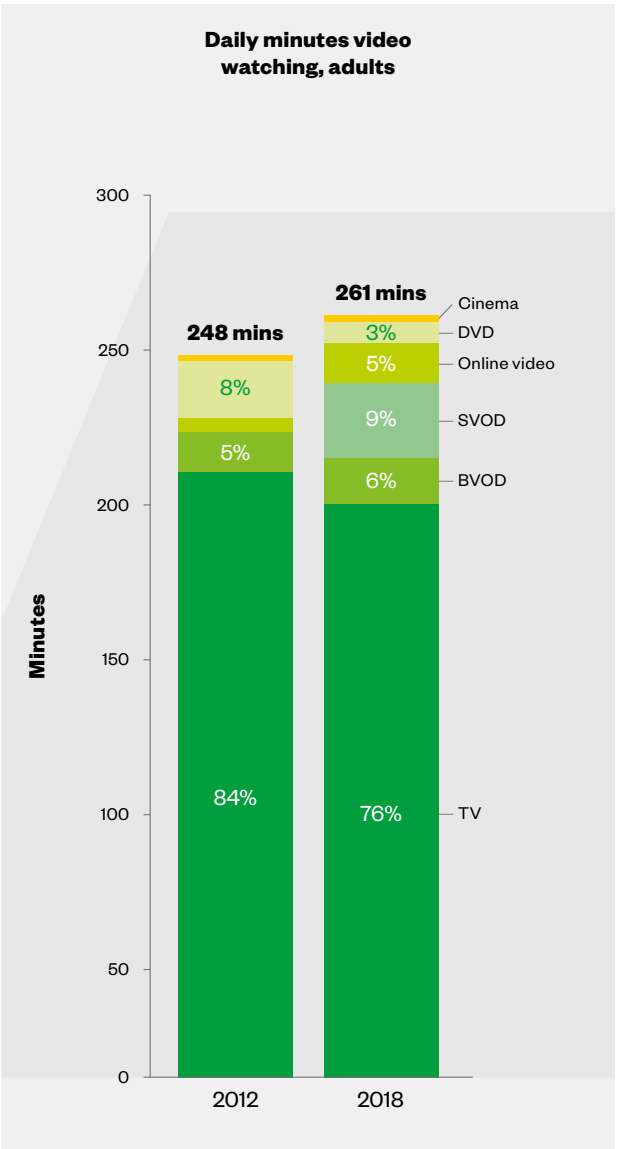
This is true of radio and TV of course, but is sometimes overlooked when it comes to online time, which is a fruit salad of different activities. For example, a large chunk of our time spent online is spent talking to each other (12% messaging), time that is largely without advertising. ■

Total media minutes have grown

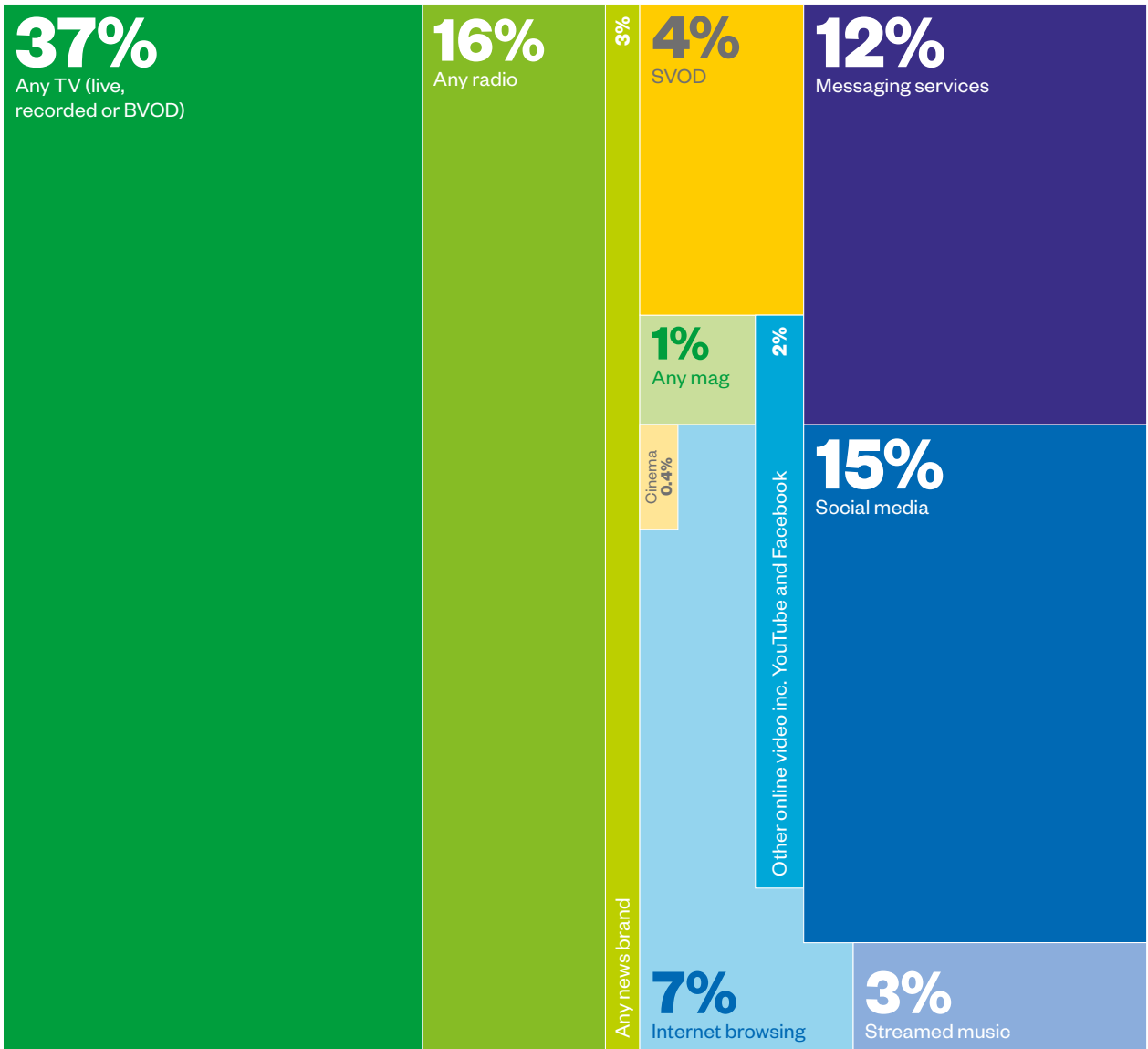


Source: IPA Touchpoints 2012 & 2018, MTM analysis

Linear TV largest video medium



Average media day



Source: TouchPoints 2018, IPA. Base: adults 15+. Includes only media which people choose to consume. TV, radio, newspaper & magazine figures include online/app consumption

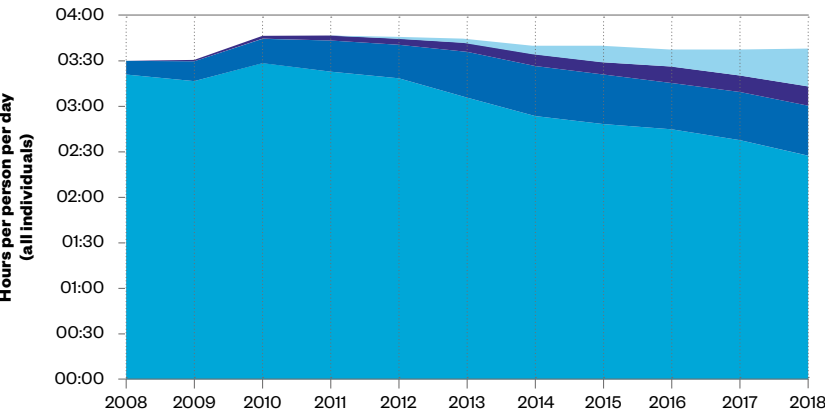
TV transformed

We are watching as much TV as ever, but the way in which we watch is changing. With the emergence of on-demand services, from broadcaster apps to the variety of Subscription VOD services on the market, consumers have access to high-quality content wherever and whenever.

TV has been redistributed

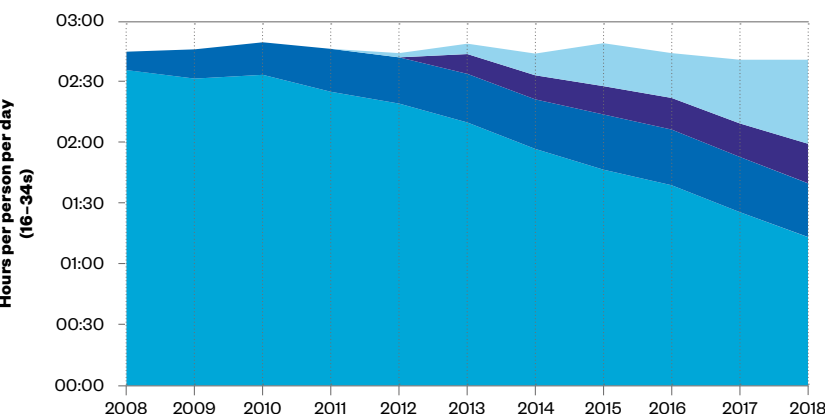
The shape of our TV viewing has changed with a redistribution of viewing from 100% linear to a blend of linear and on demand. The emergence of on-demand TV has thrown into sharp relief how vital live TV continues to be. On page 18 we'll look at the reasons why we watch different types of TV, and other video like YouTube. When considering how TV has changed, it is vital to include all forms of TV – especially when considering 16–34s. Industry standard viewing tells us that 16–34 viewing has declined by 38% since 2013, but this isn't the whole picture. If we include all forms of TV, the decline is actually 29% – and this is when two thirds of 16–34s now have access to Netflix or Amazon Prime.

TV viewing is changing (All individuals)



Source: 2008–2018, BARB / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 2018

TV viewing is changing (16–34s)



Source: 2008–2018, BARB / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 2018

Viewing changes by genre

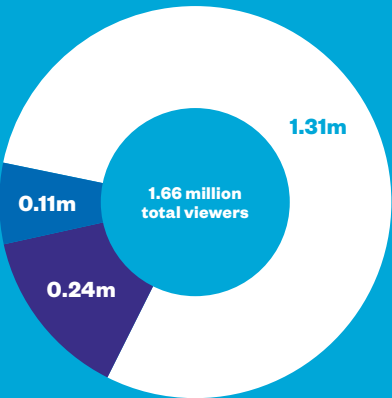
Different types of TV programming – specifically sport, drama and reality – are enjoyed differently by viewers thanks to TV’s flexibility.

Sports is time-sensitive and has high levels of live viewing

Here we see that live TV is imperative. Miss the match and you miss out – and you’ll discover the score anyway unless you lock yourself away and shut down the internet. Sport is amongst the most time-sensitive TV.

Example: Liverpool v Manchester City match, Sky Sports

- Live TV set viewing
- Time-shifted TV set viewing within 28 days of broadcast
- Device viewing within 28 days of broadcast



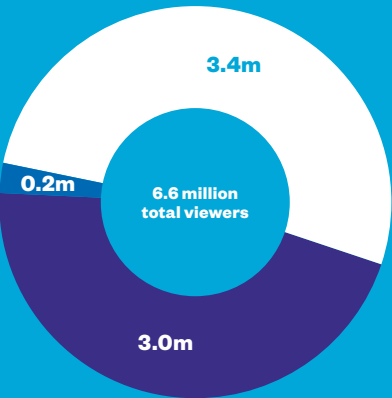
Source: BARB 2018. Individuals. 7th October Liverpool v Manchester City EPL, Sky Sports.

Primetime drama is more likely to be time-shifted

We want to dive into our drama. We want to be in control and ideally not be disturbed when we watch it. It demands our full attention, so it is hardly surprising that, now we have more control than ever over how we watch, drama is perfect for time-shifted viewing.

Example: Strangers, ITV

- Live TV set viewing
- Time-shifted TV set viewing within 28 days of broadcast
- Device viewing within 28 days of broadcast



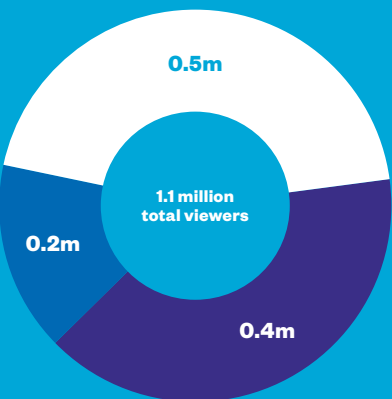
Source: BARB 2018. Individuals. Strangers, ITV. Includes average of eight 9pm broadcast episodes and repeats.

Device viewing allows for increased flexibility when watching our favourite reality TV

Shows like Channel 4’s The Circle, for example, have younger audiences and are not there to be shared with mum and dad. So here we see how TV’s proliferation across all screens is taken advantage of. If the main TV is not available, younger viewers are able to watch the TV they want on their own devices.

Example: The Circle, Channel 4

- Live TV set viewing
- Time-shifted TV set viewing within 28 days of broadcast
- Device viewing within 28 days of broadcast



Source: BARB 2018. Individuals. The Circle, Channel 4. Average across 18 broadcast episodes.

Biggest Netflix fans also love TV

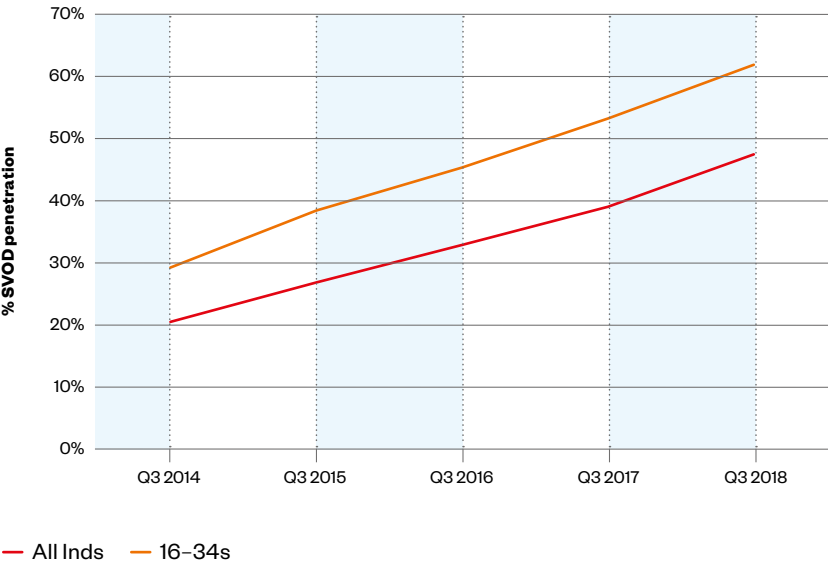
Forty-eight per cent of the UK lives in a household that has access to an SVOD subscription such as Netflix and Amazon Prime – 62% of 16–34s.

Their emergence has had an impact on the amount of broadcaster TV we watch – though not as much of an impact as many assume. On average, a 10% increase in SVOD penetration results in approximately a 5 minute decrease in daily broadcaster TV viewing per person. That said, broadcaster TV services will remain the majority of viewing even in a world where SVOD achieves 100% penetration.

An analysis of Netflix viewers shows even the heaviest viewers of the platform still enjoy plenty of broadcaster TV. In fact, only the heaviest 20% of Netflix viewers watch more Netflix than broadcast TV. For most viewers, SVOD services are used to further complement existing TV and BVOD services.

The genre that has been most affected by the emergence of SVOD is US films. SVOD does not compete directly with all of TV, UK original content remains crucial to our viewing needs. In the top 1,000 programmes on TV last year, not a single one originated outside of the UK.

Almost half of individuals have a SVOD subscription (two thirds of 16–34s)



Source: BARB Establishment survey

Viewers – and advertisers – have never had it better

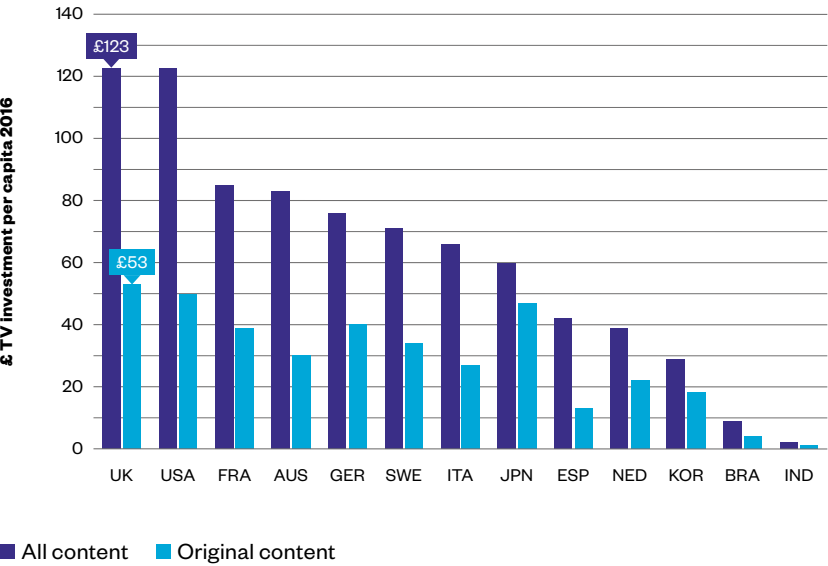
Alongside the many ways we can watch TV, the latest figures from PACT (for 2016/17) show that total revenue from UK TV show sales is £902 million.

Our TV is world class, and it is this high quality that helps ensure TV remains the premium environment for advertisers. In 2018, the UK broadcasters together invested £7.5 billion in TV shows, up 15% compared with 2008. UK broadcasters spend an average of £123 per viewer – a figure rivalled only by the US.

And it is not just the shows on offer – the way we watch them is better than ever too thanks to ever-improving technology. The last decade has seen huge improvements in TV viewing quality. 63% of main TV sets now have 40-inch screens or larger – that’s four times more than in 2008. And 72% of households in the UK now have Broadcaster VOD services available on their TV sets, five times more than 2008.

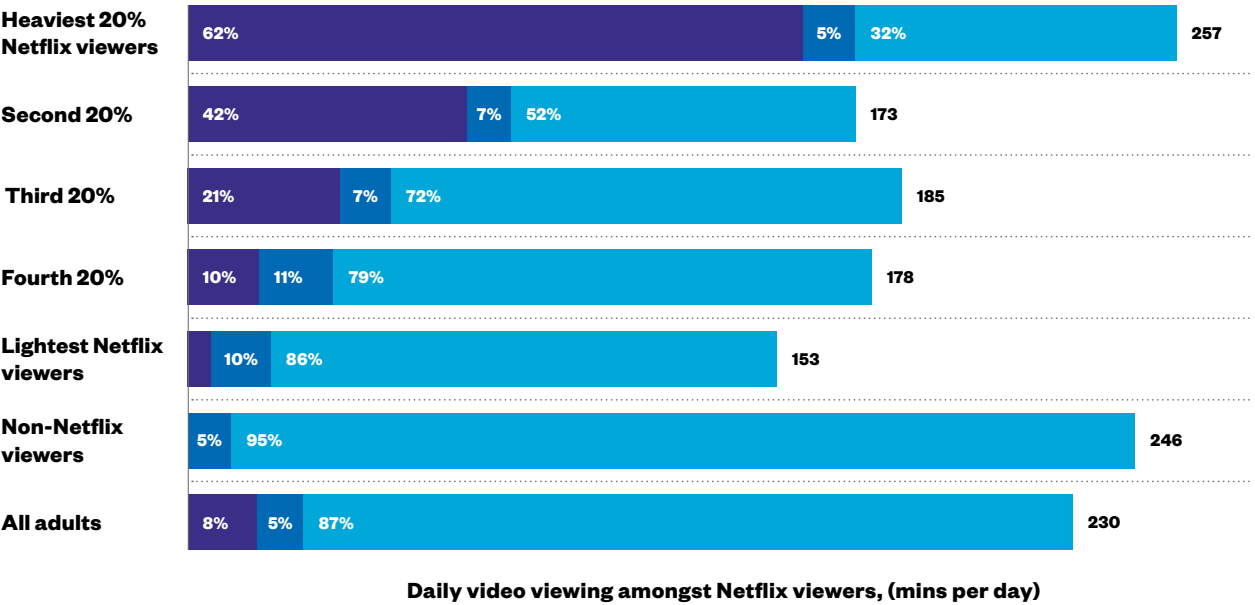
The Circle, Channel 4

The UK benefits from very high content spend



Source: IHS Markit, Ofcom (2018) Notes: All figures are expressed in nominal terms. Taken from IHS Channels and Programming Intelligence. Originated programming spend numbers, does not include any spending on sports programming. All figures have been rounded to the nearest whole number.

SVOD competes with broadcaster TV, but doesn’t replace it



Source: IPA Touchpoints 2018

Netflix BVOD TV on TV set



The video world

With video colonising every corner of our lives – from helping us fix the sink to helping us lose ourselves in quality drama – it is hard to keep track of how the tectonic plates are shifting, especially as there is no single source of measurement. That’s why we do this annual analysis of the video world.

TV accounts for 69% of all video viewing

That’s a little less than in 2017, with BVOD and SVOD taking a little away from live TV’s overall share of video. But, TV is still obviously the most popular form of video, live especially. And when you consider that SVOD services like Netflix and Amazon are TV too, its popularity increases further.

Quality matters

Of course, 69% is just the quantity we watch; it doesn’t reflect the quality of the video environment. Is the sound on? Is it watched on a big screen or glimpsed on a phone? Are humans watching it? Is the time spent video viewing at all, or is it – like a chunk of YouTube – more like a jukebox?

Facebook video isn’t growing

In 2017, video on Facebook accounted for 1.1% of total video time. In 2018, this was 1.2%. Adult video also remained on a par, accounting for 3.6% in 2017 and 3.5% in 2018. YouTube increased, from 9.0% to 11.1%.

Amongst 16–34s, TV accounts for 45.1% of all video viewing

This is down from 50.1% in 2017. Within this, 16–34s’ BVOD viewing grew from 6.4% of their total video to 7.4%. Facebook grew marginally from 1.1% in 2017 to 1.4% of their video time. YouTube went from 22.2% to 24.6%.

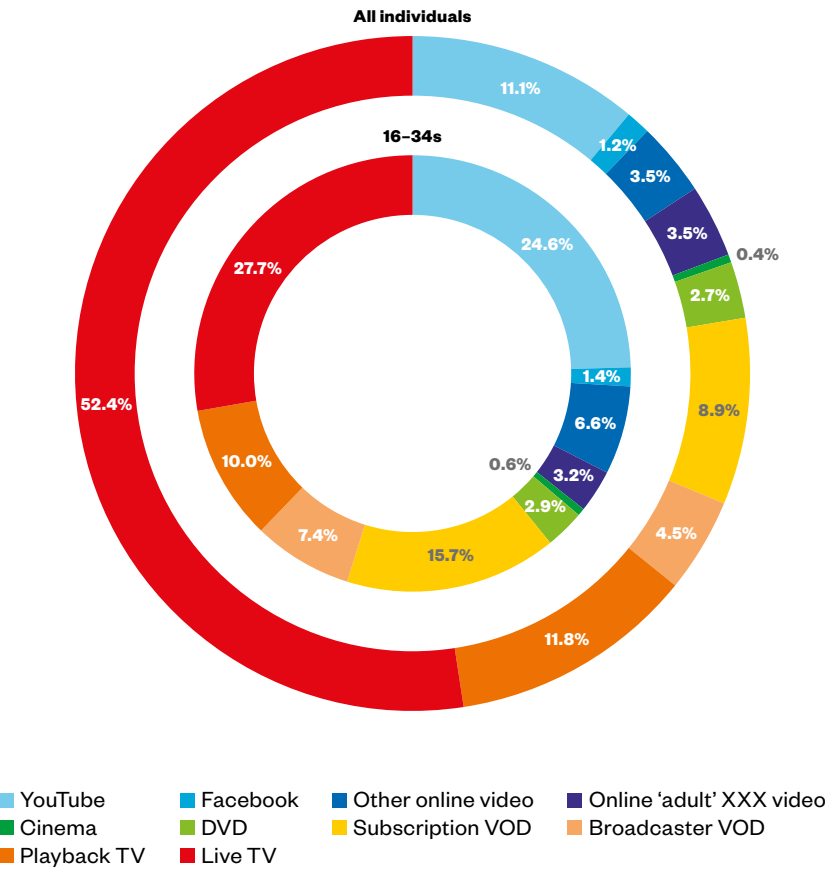
SVOD grows from 6% to 8.9%

Given the column inches services like Netflix generate, this figure will continue to surprise people. It is higher for 16–34s, where it has grown from 12.2% in 2017 to 15.7% in 2018.

Broadcaster TV accounts for 69% of our video day

Average video time per day

All Individuals: 4hrs, 41 mins
16–34s: 4hrs, 25 mins



Source: 2018, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2018 / Rentrak

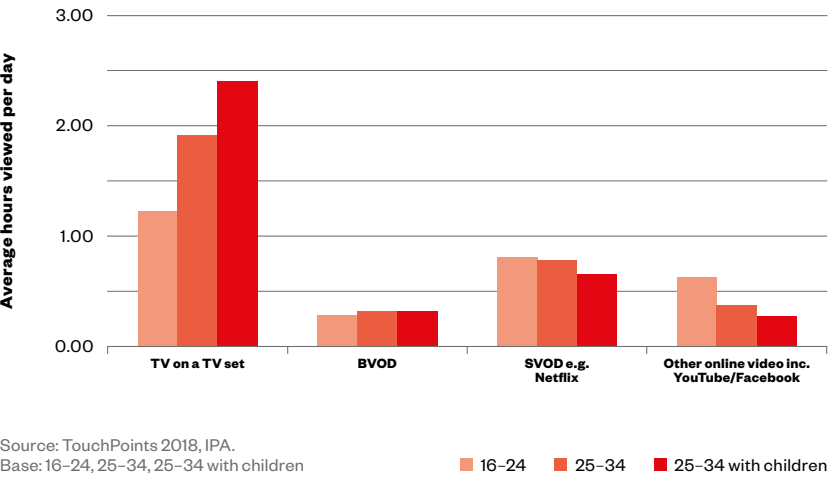
Tastes and habits change

Remember the ‘Knopfler effect’? That’s Prof. Mark Ritson’s phrase, not ours. He uses this to describe the fact that tastes and habits change as we get older. And this is true of our video consumption. The IPA’s Touchpoints study shows the impact that life stage has on our viewing habits, with TV viewing on a TV set increasing as people get older and have kids. 25–34-year olds with children watch twice as much TV on a TV set as 16–24s without children and half as much online video like YouTube and Facebook.

Suiting the video to the screen

It isn’t surprising that people prefer to watch BVOD and SVOD on the TV set, and YouTube and another online video on a PC/laptop. It is a similar story for 16–34s.

The impact of life stage on viewing



Viewing proportions by device – adults

% of all video time	Live/ streamed/ recorded TV	BVOD catch up	SVOD	YouTube	All other online video
	67.2%	3.9%	6.4%	9.1%	9.3%
	99%	68%	68%	20%	14%
	0.6%	15%	15%	33%	43%
	0.5%	11%	8%	15%	14%
	0.3%	5%	6%	30%	28%

Source: TouchPoints 2018, IPA. All adults. ‘Other device’ not shown

Viewing proportions by device – 16–34s

% of all video time	Live/ streamed/ recorded TV	BVOD catch up	SVOD	YouTube	All other online video
	42.7%	6.4%	12.6%	22.1%	11.2%
	96%	58%	62%	17%	12%
	1.8%	21%	19%	34%	42%
	0.8%	11%	8%	14%	14%
	1.0%	7%	7%	33%	30%

Source: TouchPoints 2018, IPA. 16–34. ‘Other device’ not shown

The Age of Television: the needs that drive us

When it comes to our TV, we're a needy bunch. In a good way. This new research by MTM found that, whenever we watch, we are doing so to satisfy one or more of eight different needs. It found that live TV is most popular for all but one need, and it helped explain why different forms of TV and video happily co-exist in our lives.

Different video for different needs

SVOD satisfies some similar needs to Broadcaster VOD services – especially our desire to lose ourselves in other worlds via TV.

But it can't really do all the things live TV does, especially the more social or communal reasons we watch TV, which are so important to viewers. There is some overlap, though. SVOD is sometimes watched to unwind, for instance, but this is reliant on access to familiar content. There's a reason Netflix has tripled the amount it pays to licence Friends to \$100 million.

These different roles help explain why, in a time of unlimited on-demand choice, live viewing is still over half of all video time (see page 16).

We expect more from video

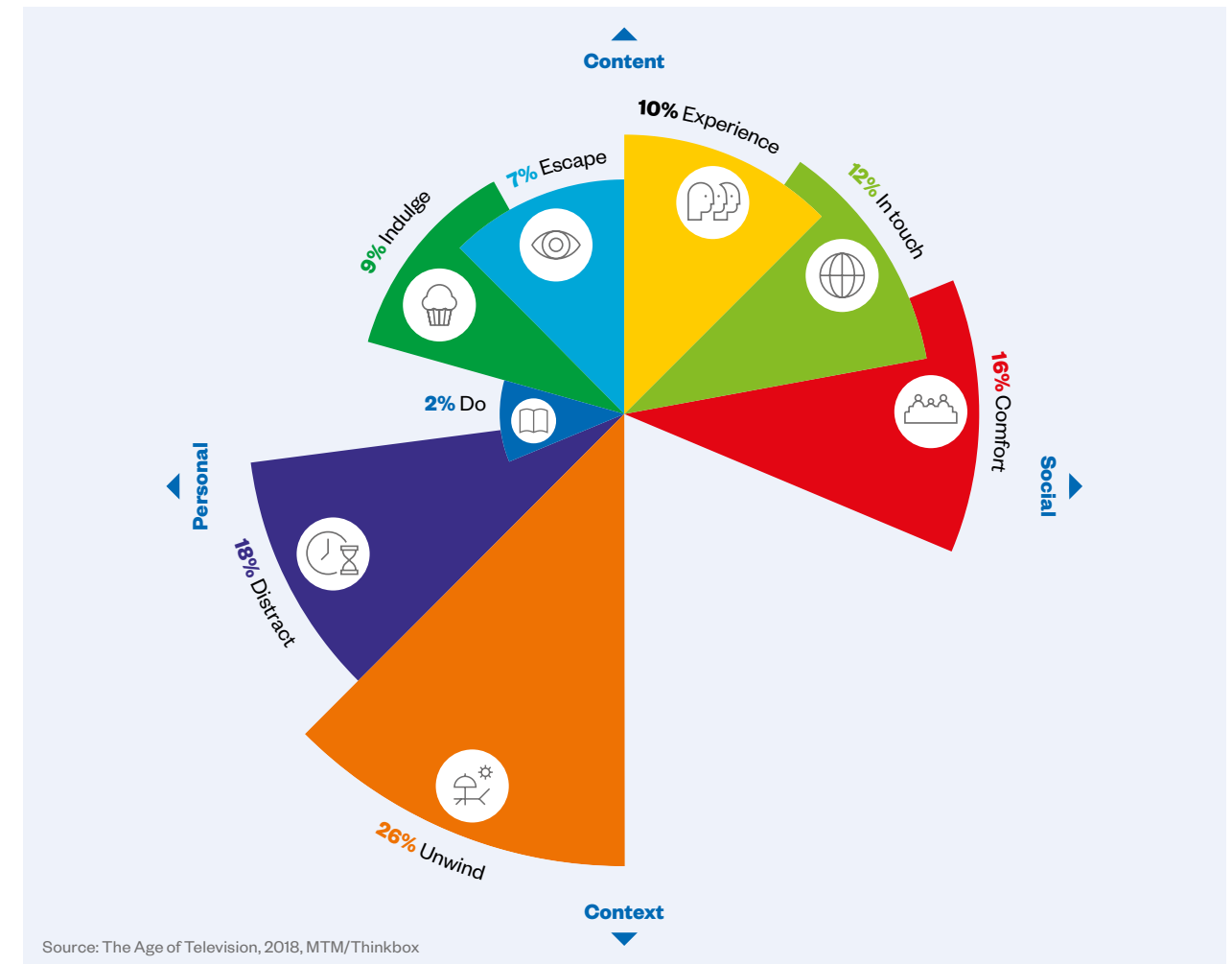
New forms of video have brought new uses. For example, online video like YouTube excels at quick distraction – largely due to the often-mobile nature of use and prevalence of short-form content. And it excels when it comes to watching video for practical help, because it has a very long tail of 'how to' guides on a variety of topics. We used to look at a DIY manual or ask someone how to fix the tap, now there's countless videos to help us. ■

“Live viewing is still over half of all video time.”

Methodology

'The Age of Television' study was conducted by research and strategy consultancy MTM, commissioned by Thinkbox. Its findings are based on a qualitative analysis of 150 days of TV and video viewing filmed through camera glasses worn by 30 people, and a quantitative study of 6,000 people in the UK.

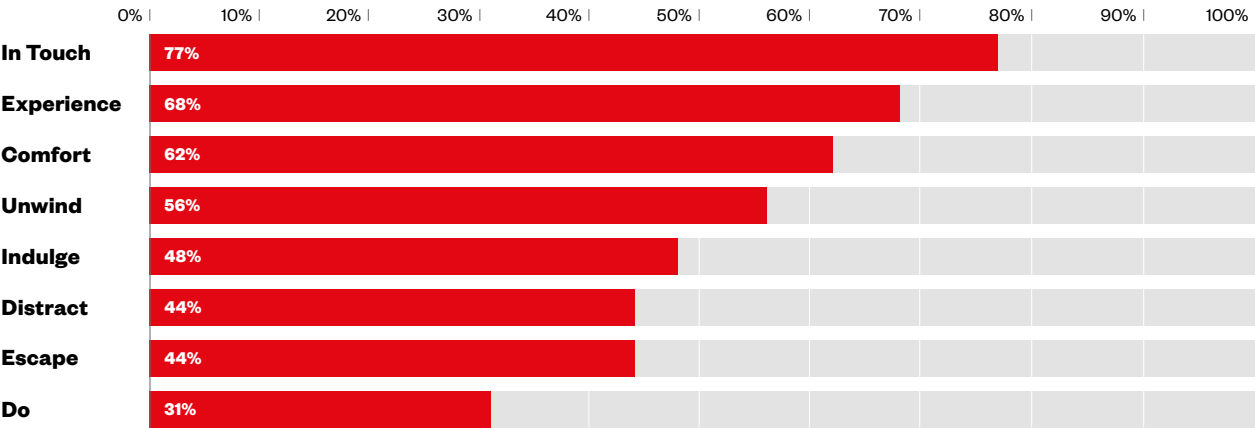
Needs are driven by both internal & external factors



The Age of Television: Key Charts

LIVE TV

Live TV viewing is driven by the need to keep in touch and experience viewing with others

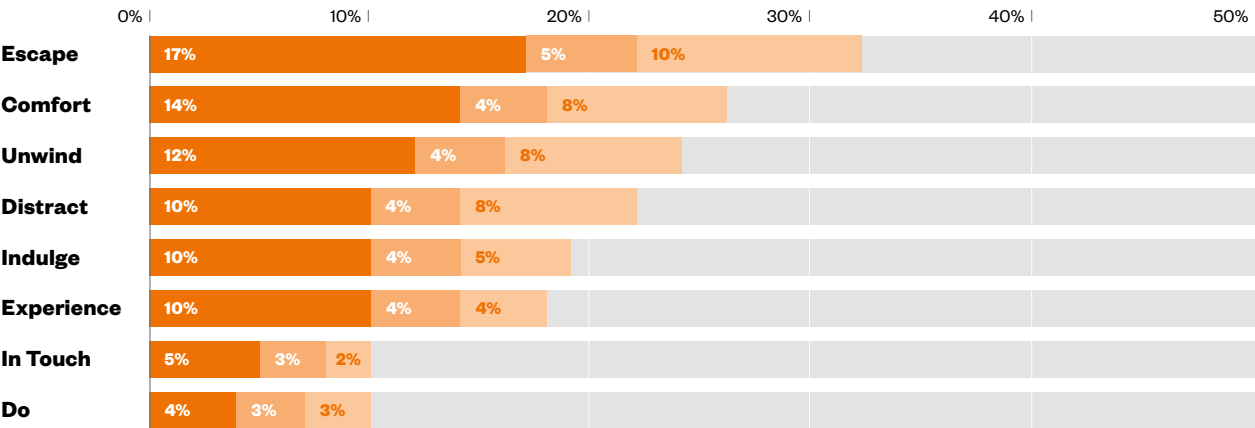


Source: The Age of Television, 2018, MTM/Thinkbox. Base: see notes

■ Live TV

ON-DEMAND

Escaping into content drives on-demand viewing

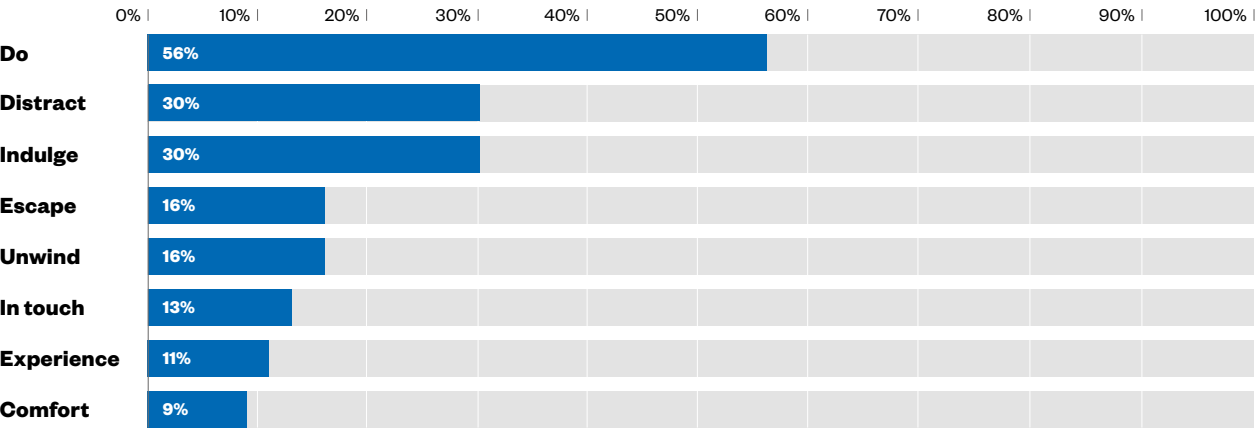


Source: The Age of Television, 2018, MTM/Thinkbox. Base: see notes

■ Playback TV ■ Broadcaster VOD ■ Subscription VOD

ONLINE VIDEO

Viewing for practical tasks, or to distract ourselves, has high online video usage

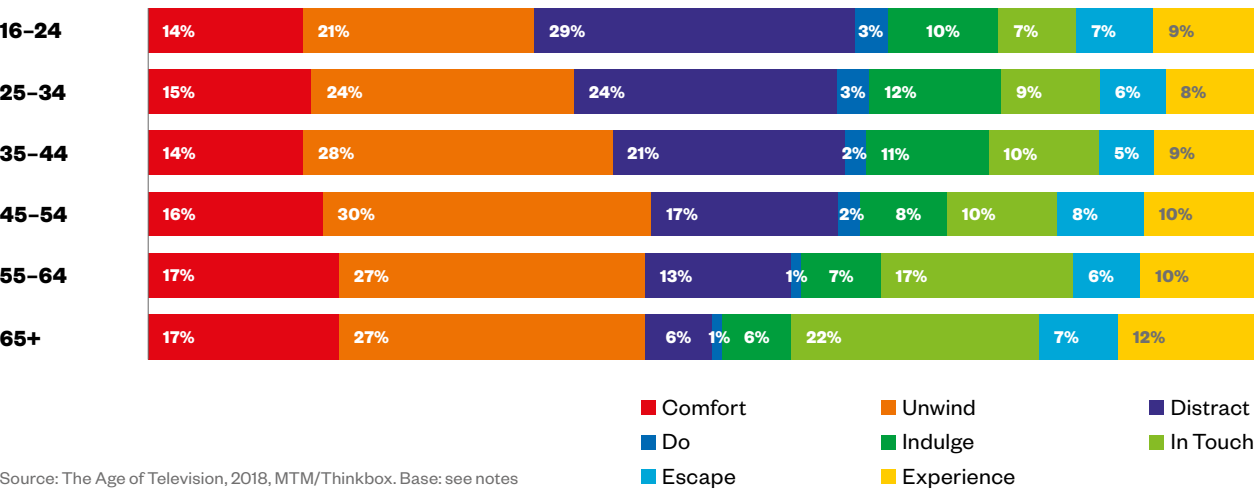


Source: The Age of Television, 2018, MTM/Thinkbox. Base: see notes

■ Online Video

NEED STATES BY AGE

Comfort, unwind & experience change little with age



Source: The Age of Television, 2018, MTM/Thinkbox. Base: see notes

■ Comfort ■ Unwind ■ Distract
■ Do ■ Indulge ■ In Touch
■ Escape ■ Experience

Embracing total TV advertising

TV is fundamental to ads getting seen by humans, accounting for 94.6% of all the video advertising that people see in the UK.

TV is the major form of video advertising

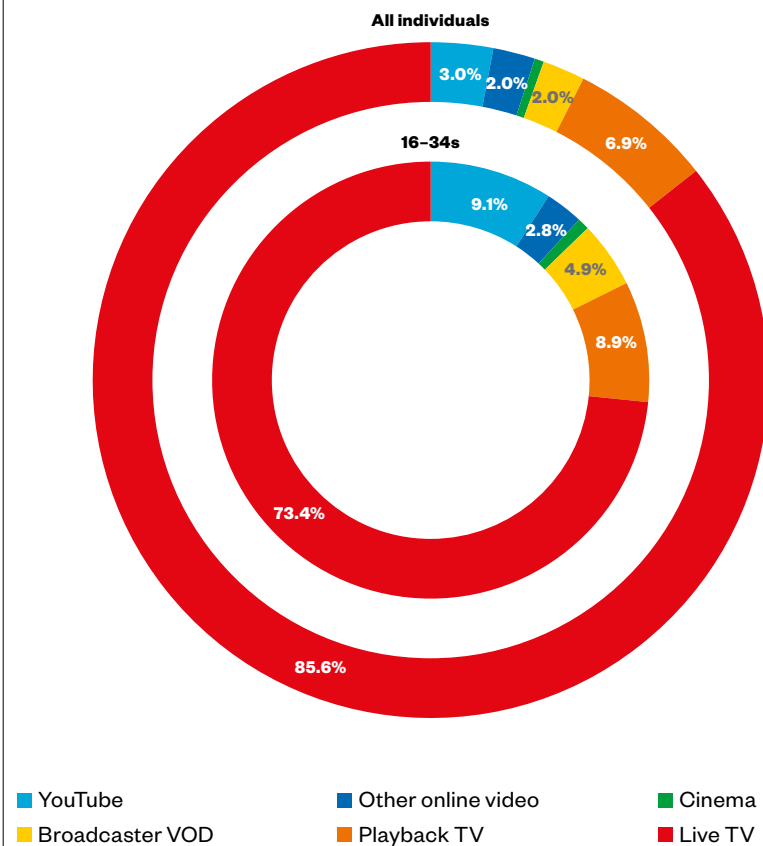
Only 5.4% of the video advertising seen in the UK is anything other than TV. For 16–34s it is slightly different, but TV continues to account for 87.2% of all video advertising.

But that is just quantity. With TV you also get proven, trusted quality: TV ads are seen in full (or not counted in measurement), with the sound most likely on, and in an environment that is the brand safest around thanks to the high quality of the shows and the strict adherence to regulation.

TV is fundamental for getting ads seen

Average video advertising time per day

All Individuals: 18.5 mins
16–34s: 12.5 mins



Source: 2018, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2018 / Rentrak


TV continues to deliver excellent value

In 2018, the average cost per thousand (CPT) for broadcast TV ad views was £5.13, up 1% on 2017 and 21% cheaper in real terms than 10 years ago. This figure only includes TV advertising that is watched from start to finish at normal speed.

Only younger audiences have been affected by recent inflation

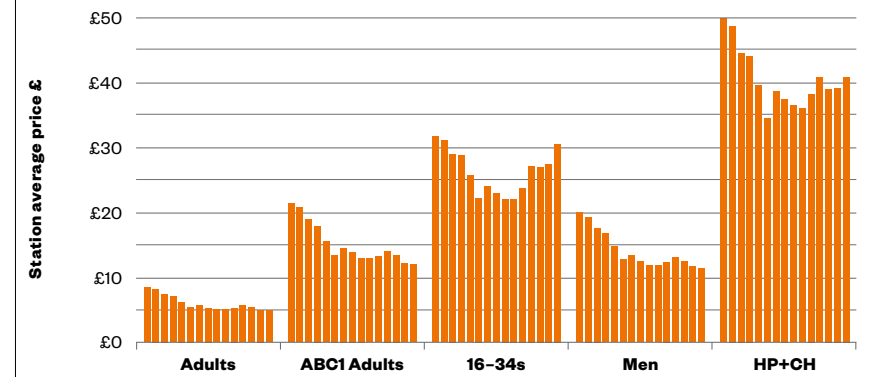
The chart to the right illustrates the changing average cost for buying 1,000 impacts on linear TV for a few of the key buying audiences over the last 15 years using constant prices – i.e. taking into account the changing value of the pound in line with the UK's retail price index.

For broad audiences, Adults, Men and upmarket audiences ABC1 Adults, the cost of advertising on TV has decreased over time. For younger audiences, 16–34 Adults and Housepersons with Children, we have seen inflation in recent years, as their viewing has moved to Broadcaster VOD and Subscription VOD. However, both of these audiences still offer excellent value for money and as we'll see over the page, by combining Linear Broadcaster TV with Broadcaster VOD, it's possible to continue to drive high levels of cost-effective reach.

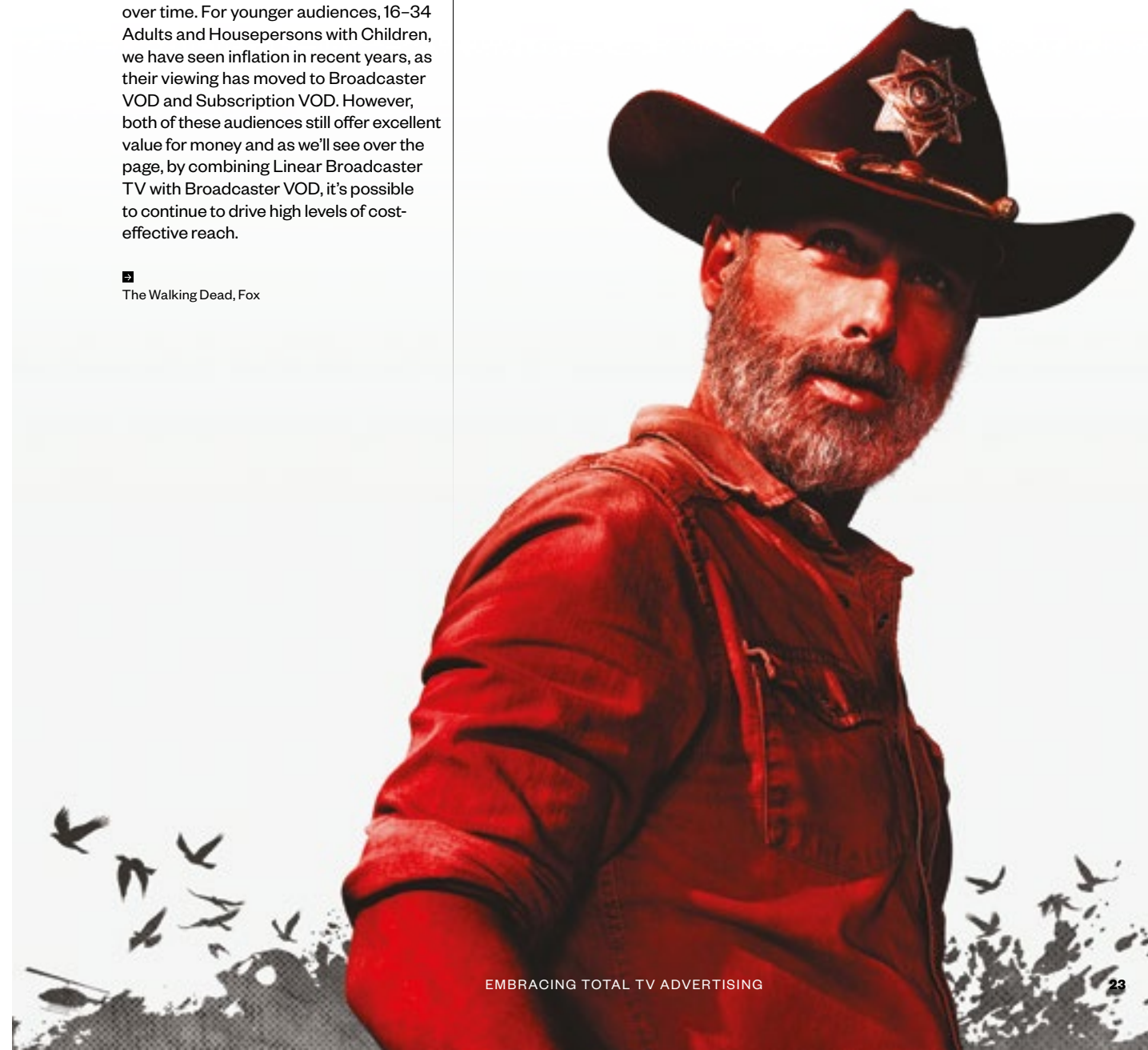
 The Walking Dead, Fox

Only young audiences affected by recent inflation

Station average price by audience 2004 to 2018 (each bar is a year)



Source: BARB / AA / WARC / ONS – Constant prices – RPI



BVOD is now a necessity, not a luxury

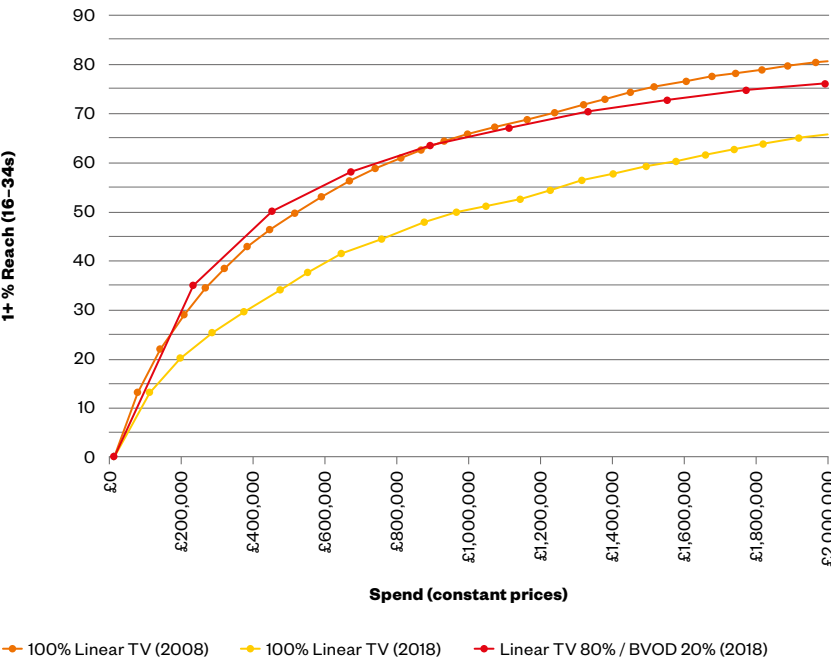
Linear TV and BVOD advertising can be combined on a like-for-like basis as they are essentially the same thing, the same quality. You can't do this with other forms of video that have low viewability, are not brand safe and not viewed from start to finish.

As viewing has re-distributed between linear and BVOD, so TV advertising must too. For example, a campaign today targeting 16-34s with a budget of £1 million planned only across 'industry standard' broadcast TV reaches 50% of 16-34s, when it would have been 65% back in 2008. But an 80:20 mix of industry-standard TV and BVOD takes this back up to 65%, according to IPA Touchpoints channel planner data. TV's reach is undiminished when you embrace total TV.

While IPA Touchpoints channel planner data isn't a perfect single source guide on campaign delivery across all forms of TV, it is the best we have for now and does illustrate, from a credible and neutral source, the nature of how viewing has changed and how BVOD is increasingly important for driving cost-effective reach.

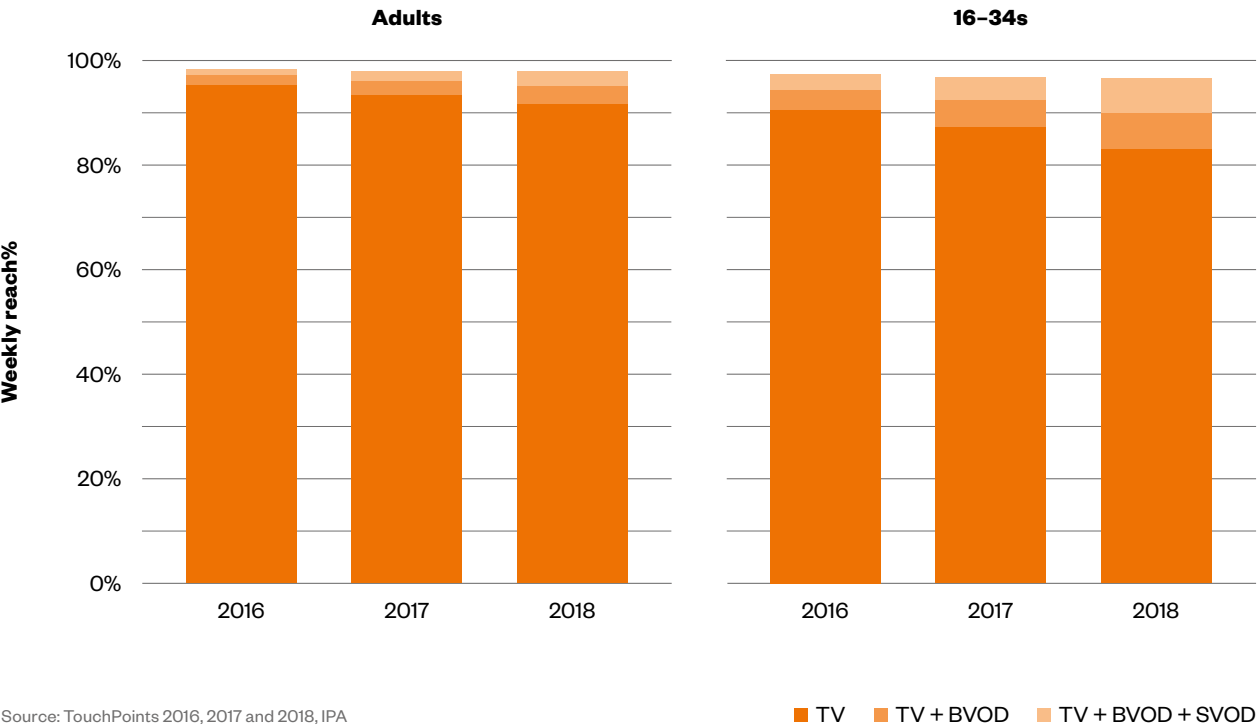
Total TV drives cost-effective reach

16-34 cover guide



Source: BARB / K2 / Touchpoints 2018 (6 weeks 34-39) / Station average prices / Natural delivery

Incremental reach achieved by TV + VOD



Source: TouchPoints 2016, 2017 and 2018, IPA

TV advertising had a strong 2018

TV advertising revenue in the UK totalled £5.11 billion in 2018, matching the amount invested in 2017, according to full year figures provided to Thinkbox by the UK commercial TV broadcasters. This was a strong performance given the challenging economic environment.

Online businesses remain biggest TV category

Collectively, online businesses remain the biggest category of advertisers on TV. Based on 2018 data from Nielsen, online businesses – including brands such as Google, Just Eat and Trivago – invested a total of £760 million in TV advertising, £47 million (7%) more than in 2017.

As well as online businesses, other categories also increased their TV spend – for example, finance brands invested 18% more. And some categories, particularly those under particular economic pressure like retail, invested less. These shifting levels of investment in TV – up in some sectors, down in others – reflect wider structural changes in the business and economic environment.

Amazon increased TV spend by 21%
Of the increased investment by online businesses in 2018, Amazon was notable. According to Nielsen, it spent £60 million on TV advertising, up 21% year-on-year, making it the third biggest investor in TV advertising in the UK (previously it was fifth). Only Procter and Gamble (£169m) and Reckitt Benckiser (£79m) invested more in TV during 2018.

It is a testament to TV's continuing power to deliver that a company like Amazon, which understands its customers so well, is using TV to power its success.

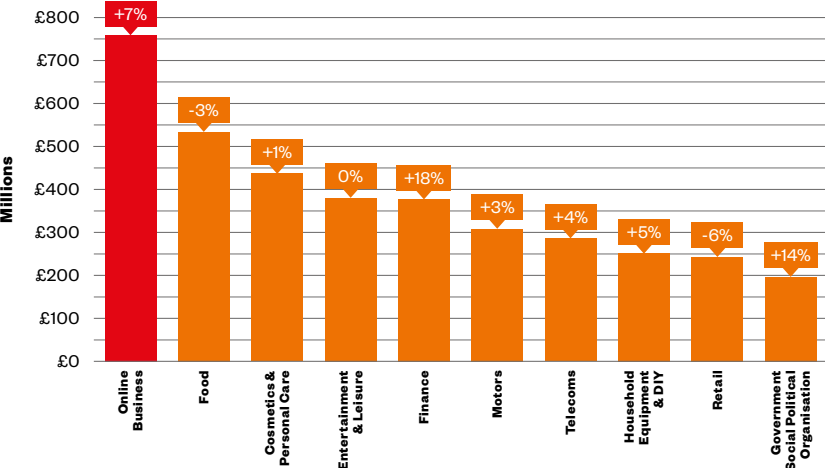
TV's immediate impact

One of the reasons online businesses invest in TV advertising is the immediate impact it has online. For example, within the first week of Dollar Shave Club's TV campaign in the UK, branded online search grew by 570%, according to Google Trends data.

867 new or returning advertisers on TV

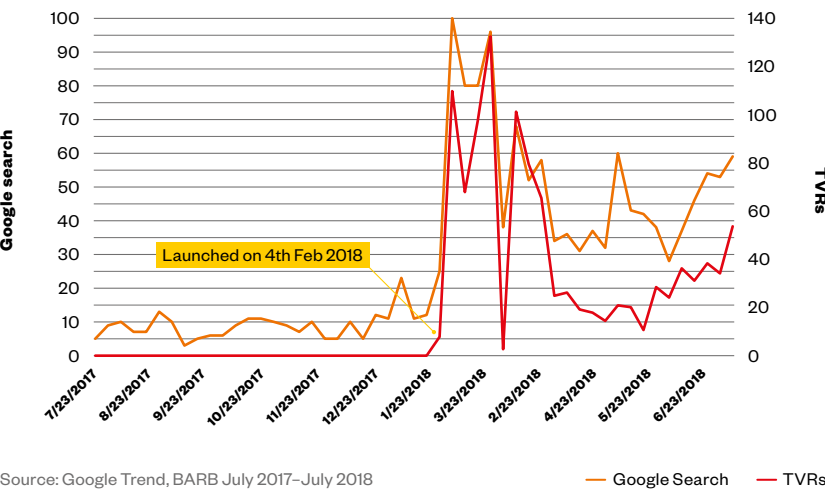
This figure represents the number of brands who advertised on TV for the first time in 2018 or returned to TV after a gap of at least five years. Notable new or returning brands included Vinted, Square and Peloton cycles.

Online businesses are the biggest investors in TV



Source: Nielsen, 2017 vs. 2018. 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses.

Dollar Shave Club TV launch



Source: Google Trend, BARB July 2017-July 2018

NOTE

The total TV advertising figure of £5.11 billion represents all money invested by advertisers in commercial TV in the UK across all formats and screens: broadcast TV spot and sponsorship, Broadcaster VOD, addressable TV, interactive TV advertising, and product placement.

2018 at a glance

92.1%

Weekly TV set reach at **92.1%** of all individuals

BT Sport launches on All 4

Carolyn McCall joins ITV as Chief Executive



Save Me has audiences hooked: Lennie James, Suranne Jones and Stephen Graham star in Sky's new six-part abduction thriller

24 Hours in Police Custody films a corrupt policeman getting arrested

In The Long Run: Idris Elba stars in semi-autobiographical comedy on Sky One

Amazon revealed as GBBO sponsor: the tech company's biggest in UK TV partnership to date

Jan

Feb

Mar



Kiri Channel 4's biggest ever drama: New drama hits our screens and pulls in 3.2m viewers

Commercial TV wins big at the NTAs: I'm A Celeb, Broadchurch, Gogglebox, Emmerdale & This Morning all winners

Captain Obvious returns: Hotels.com 'block' ads on All 4

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



315 hrs

The average person watched **315 hours** of TV in Q1 (This is the equivalent of watching the whole of Netflix's new series Altered Carbon more than 31 times)



Fans left devastated as Aidan Connor takes his own life: bringing in Corrie's highest-ever male 16-34 audience

British Arrows Commercial of the Year goes to: Essity's #bloodnormal by AMVBDO, continuing the award wins for this great campaign

Maserati launches first UK TV advertising campaign with Sky AdSmart

Age UK and MGOMD take the Grand Prix at the TV Planning Awards

Advertising Association honours Tess Alps with Mackintosh Medal: rare award bestowed for outstanding service to advertising

Love Island is a big hit again: Georgia is 'loyal', the 'do bits society' is formed, Jack & Dani win the series

93%

The power of BVOD: Sky, Channel 4 and ITV showcase the power of BVOD with new research collaboration – the average view-through rate for Broadcaster VOD is **93%**



Apr

England netball team triumph: England stun favourites Australia and win gold at the Commonwealth Games

High-street favourites on Corrie: New set is seen on screens for the first time featuring Costa and the Co-Op

Sir David Attenborough interviews her majesty in The Queen's Green Planet, ITV



May

Benedict Cumberbatch stars in Sky Atlantic's Patrick Melrose to critical acclaim. The series reached a total of 1.3m



1.9bn

An estimated **1.9 billion** viewers watch royal wedding worldwide

Jun

1.59m

Bulletproof hits the target with record Sky One audience of the year: with a cumulative audience of **1.59 million** viewers



Winner

Geraint Thomas wins Tour de France: the Team Sky rider became the third Briton to win the Tour



Bodyguard is ratings hit of the year: the audience peaked at 10.4m for series finale

The end of Big Brother: the show comes to end on Channel 5 with a headline-hitting series featuring #punchgate

Succession airs on Sky Atlantic: and according to The Guardian “quickly became the year’s most deliciously guilty pleasure”

£30.6bn

Comcast wins auction for Sky with **£30.6 billion** bid

VICE content launched on All 4 in September: achieves 2m views in 2018

Jul



24m

It almost came home: More than **24 million** people watch England win quarter-final penalty shoot-out on ITV

Channel 4 reveal a new artificial intelligence (AI) ad product: aiming to help brands better integrate with linear TV

Aug

ITV Business launches: a self-serve advertising portal for SMEs

The Great British Bake Off Launch: averaging over 9m per episode on Channel 4

Danny Dyer’s Brexit rant on Good Evening Britain is crowned the ‘TV Moment of the Year’ at the Edinburgh TV Awards



Sep

Channel 4’s The Circle launch a hit with 16–34s: averaged at 1.5m, indexing at a whopping 203 for 16–34s

Alistair Cook gets a standing ovation at the Oval: as he scores a century in his last-ever test match.

Taskmaster season 7: record high of viewers at 1.2m

2.7m

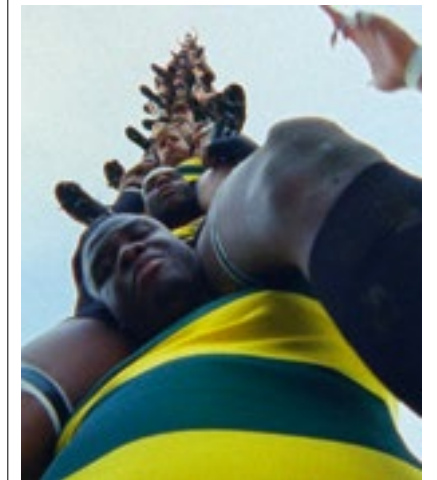
Channel 4 Celebrity Hunted Launches: averaging **2.7 million** and featuring Chris & Kem, Dom Joly and Kay Burley



Christmas ads are revealed: featuring an epic with Elton, and a boy dressed as a plug goes viral and captures hearts

Holly Willoughby fills in on I’m A Celeb: the show returned with its biggest ever launch 13.7m consolidated viewers

Nike’s groundbreaking ‘Nothing beats a Londoner’ named best film ad of the year by Campaign



Danny Dyer delivers Channel 4’s alternative Christmas message

Oct

Thinkbox win Gold: Our Profit Ability study scoops Gold at the Media Week Awards



Hollyoaks airs special episode for World Mental Health Day

Channel 4 chooses Leeds as new headquarters

Nov

1.6m

Brexit: What The Nation Really Thinks, Channel 4, attracts a peak audience of **1.6 million**

World TV Day is celebrated across the globe



Tyson Fury’s highly-anticipated return to boxing: fight against Deontay Wilder was broadcast on BT Sport ending in a draw



Televisionaries

Let's end online mis-aggregation



Matt Hill
Research and Planning Director, Thinkbox

There is a habit in media of sweeping up internet activities into big meaningless numbers. From the total amount of money spent on the various forms of advertising online, to talk of 'online time' as though it is a single type of activity. This made sense when the internet was new, but it doesn't make sense now.

The internet is part of the fabric of life. Adding it all up is an approach that hides more than it reveals. The internet isn't a single thing; it is a platform for multiple things – multiple types of advertising, multiple types of time spent.

And we have the data about what is being done online, so why don't we cut it meaningfully to help explain how media is developing?

For example, we can use the Advertising Association/WARC ad spend data and IPA Touchpoints data on media consumption to estimate how ad spend breaks down by media format and type.

So, we have.

It is important to say that this is not a definitive view and there are arguably better data sources than Touchpoints for breaking down media types into time spent by device. But it does provide a ballpark idea of how ad spend would look if we avoided chucking everything spent online into one bucket and took a more granular and meaningful approach.

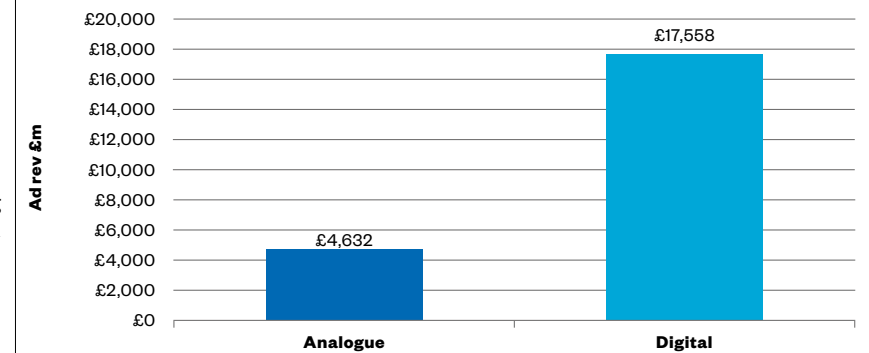
Media technology

This is the simplest, most reductive way we can slice ad spend. Is the media technology analogue or digital – or a mixture of both? What is obvious immediately is that the vast majority of ad spend is now in digital media, though there is still a chunk in analogue (see chart, top right).

That isn't incredibly instructive. I admit. However, if we cut this by media owner type, we can then shed light on where analogue advertising still exists. Direct mail is still entirely analogue, newsbrands and magazines are still mainly analogue, and OOH and Radio are 50/50. TV and cinema are both entirely digital (see chart, right).

79% of ad spend is delivered via a digital signal

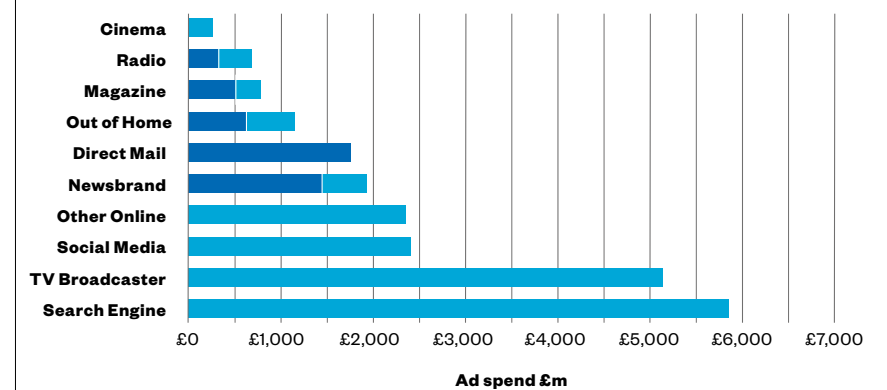
2017 split of ad spend by delivery technology



Source: AA/WARC 2017, Touchpoints 2017

Only Direct Mail is 100% analogue

2017 spend on advertising by media owner type and delivery technology



Source: AA/WARC 2017, Touchpoints 2017

Judge Romesh, Dave



Delivery device

Moving on from the media technology being used, we can look at the delivery devices themselves. Is it a mobile device, is it a TV set or radio set, is it via print?

Mobile devices account for the largest portion of spend, followed by desktop/laptop computers and then TV sets. But this hides as much as it reveals because the AA/WARC spend data includes online search and classified advertising as well as display. So, let's split that out (see chart, right).

Now we can see that a huge amount of mobile device and desktop/laptop computer spend is driven by search and classifieds. The TV set is entirely a domain for brand-building display advertising, as is the radio set, cinema screens and OOH sites. Print-based advertising is mainly display but with some classifieds (e.g. directories).

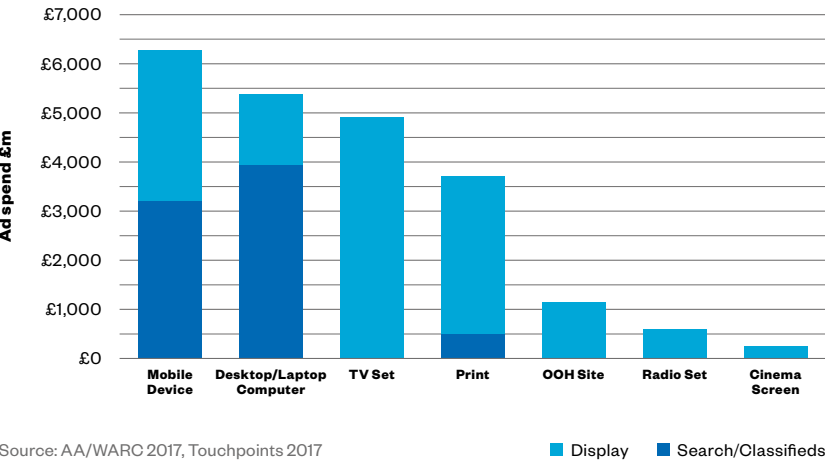
Media owner

There is a strong argument that online search shouldn't be included in ad spend figures at all. The argument being that it is not really advertising; it is more like point of sale. Search is demand-harvesting rather than demand-generating, like display advertising. It doesn't entice you in, it's there once you've been enticed. You could equally include investment in high-street location or shelf space in supermarkets. Search investment has always warped the mis-aggregated total 'internet' ad spend numbers as it accounted for so much of it.

But, search is in the AA/WARC figures, so let's keep it in here, but split it out. When we do this, we can see that TV broadcasters are the biggest demand-generating media owner by spend – twice as large as the next largest media owners type, social media.

Mobile ad spend mainly delivered by search

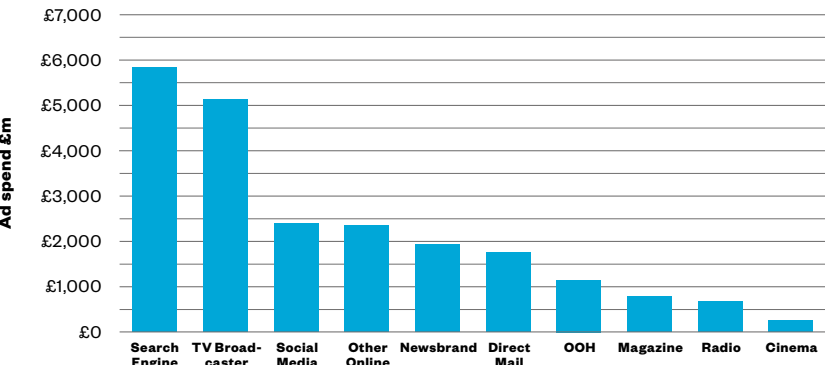
2017 ad spend by delivery device



Source: AA/WARC 2017, Touchpoints 2017

TV Broadcasters are the biggest demand-generating media owner type

2017 ad spend by media owner type



Source: AA/WARC 2017, Touchpoints 2017



The Big Narstie Show, Channel 4

Media format

Finally, let's look at how spend shakes down when we cut the data by different ad formats, namely: plain text, static image, audio-visual, moving image only, and audio only (see chart right, top).

Even though the direction of travel in advertising in recent years has undoubtedly been towards audio-visual, plain text and static images still rule.

And this gets more interesting if you look at which media owners employ which media formats (see chart right, bottom).

Then we discover that plain text is so big because search is such a large chunk of spend. We also see how the TV broadcasters are the biggest players in audio-visual advertising, and how social media ad revenue comes mainly from static images, then moving image (no sound), and then audio-visual.

Summary

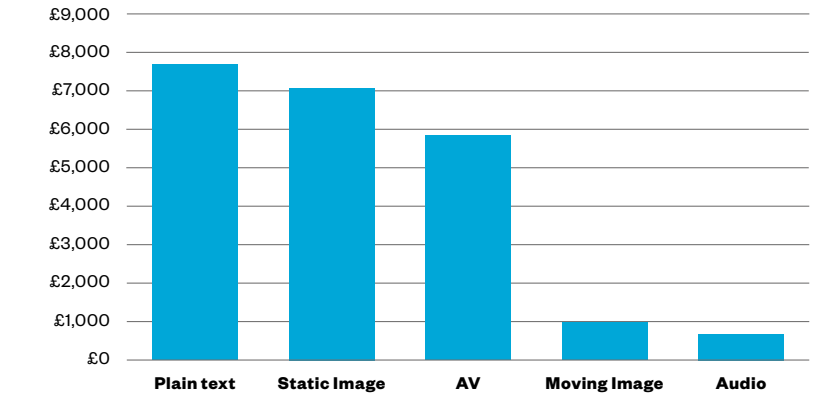
So, as you can see there are many ways that the existing data can be used to put media activity into more meaningful buckets. It is time to stop reporting the internet as a single thing; to dis-aggregate the mis-aggregation. It is time to treat it as the wonderfully diverse platform it is and give advertisers better insight into what is actually happening. ■

Strangers, ITV



Static image is the most popular demand generating format

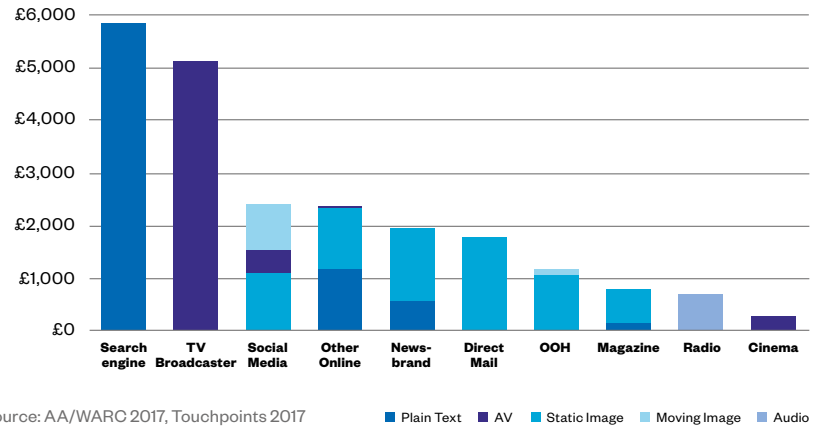
2017 ad spend by media format



Source: AA/WARC 2017, Touchpoints 2017

TV Broadcasters dominate in AV advertising revenue

2017 ad spend by media owner type & media format



Source: AA/WARC 2017, Touchpoints 2017

Advertisingeffectivenessfor.coms

Christmas 2018 brought not just a flurry, but a veritable avalanche of TV brand advertising for online brands. The deluge can't have escaped any TV viewer's attention, and with good reason. Amazon, Google, eBay and Uber spent £15m on TV in December alone, and there were many other online brands competing for our attention.



Les Binet adam&eve/DDB
Peter Field Marketing Consultant

But this was not just a Christmas blip. For several years now, the big tech companies have been major investors in TV, both here and in the States. These days, even Facebook advertises on TV.

So, what's going on? These are the very companies that are reputed to understand advertising effectiveness in exquisite detail. With their rich data and world-leading analytics, we might have expected them to focus on data-driven sales activation media. Isn't TV the medium they are advising others is a waste of money?

Either they've been reading our new book, *Effectiveness in Context*, or, more likely, they've worked out for themselves that online businesses need offline advertising, and they especially need the extraordinary brand-building powers of TV.

The effectiveness sweet spot

In *Effectiveness in Context* we examined how the rules of effectiveness vary for different brands in different situations. In particular, we looked at how context influences the ideal balance between brand-building and sales activation, adjusting our '60:40 rule' for budget allocation.

This rule – derived from extensive empirical effectiveness evidence – demonstrates that businesses need both brand advertising (broadly targeted)

“Online businesses especially need the extraordinary brand-building powers of TV.”

and short-term sales activation (tightly targeted), and that these should generally be balanced 60:40. Too little brand building and the brand weakens, undermining response to sales activation messages. Too little activation and the brand fails to exploit its full sales potential. So effectiveness is all about balance. We always knew that the 60:40 sweet spot was an average across all brands and that it was likely to shift in different contexts. Our latest research now confirms this and offers new guidance on how to get the balance right. The key principle however, in all contexts, is to ensure that brand and activation effects are balanced. And that means focusing on whichever is the harder task; so if activation is the easy part, the focus should shift towards brand building. But if brand building is easy, then the focus should switch to activation.

It turns out that the digital revolution has had a significant impact on this optimum balance, but not in the way most marketers think. New digital channels have generally made activation easier, especially for online brands.

In this context, buyers tend to leave conspicuous data trails as they approach purchase, and although the path from exposure to sale may only be a few clicks long, there will be opportunities to serve activation messages.

With activation made this easy, the predictable response in many companies has been to put ever more resource behind it, but our research suggests that this is a mistake. Online businesses should be using these efficiencies to save money on activation, and investing that money instead in building their brands; a much harder task in today's crowded and competitive online markets. In this context, then, the sweet spot moves closer to 75:25, brand advertising to sales activation (see chart below, left).

One of the reasons online brands' sales are easier to activate is that buyers are more likely to have done some online research before hitting the buy button. This creates additional data and opportunities to serve activation messages.

But online research is not only a feature of online purchasing: it has been growing for offline brands as well. The growth of online research and e-commerce, together with other marketplace trends that make activation easier, have worked together to generate a strong pro-brand trend in the optimum balance across the whole economy – whether online or offline (see chart below, right).

Balance in an imbalanced world

So, in most contexts marketers should be tilting ever more towards brand building. But are they actually doing this? In practice, they are doing the very reverse, and with disastrous consequences; typical effectiveness levels are being driven ever lower.

“In most contexts marketers should be tilting ever more towards brand building.”

This scenario has, however, created fantastic opportunities for brands smart enough to strive for balance in this imbalanced world. The 2018 IPA Effectiveness Awards case studies from the Direct Line Group and the AA are both magnificent demonstrations of what can be achieved. Both businesses operate in largely online markets and both chose to tilt strongly towards brand building, with remarkable results.

And both chose TV as their primary brand-building channel because of its proven potency for them. As the Direct Line Group reported in their case study:

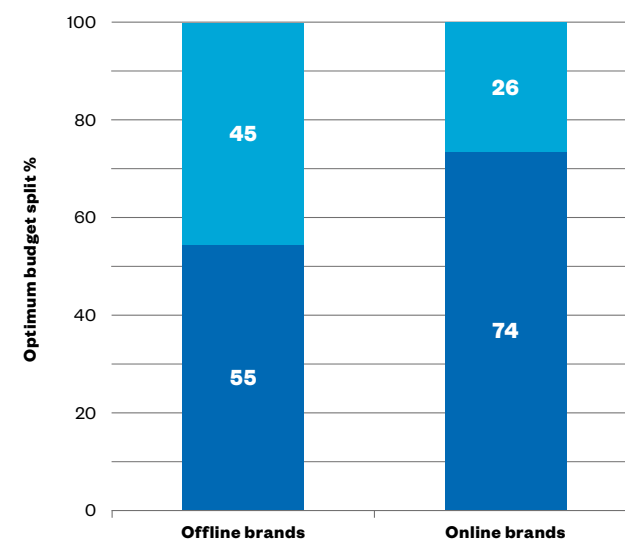
“We could find compelling evidence for both the long-term and short-term effectiveness of media lines such as TV and radio. By contrast, our research did not support continued investment in a number of programmatic digital media lines even on a short-term basis.”

Presumably, tech giants like Amazon, Google, eBay and Uber have already reached similar conclusions in their own research. Why else did they spend Christmas piling into TV?

The recent media choices of the tech giants reflect a growing realisation amongst online businesses of the power of TV. They are proving that we have been led astray by the zealous advocates of online-only 'digital' media, but they are also showing us the way forward. And where Silicon Valley leads, the rest of marketing will eventually follow.

So perhaps 2019 is the year we reach “peak digital” (to use Nick Suckley's phrase) for branded businesses? It would be a welcome development – and hopefully it would not escape the attention of those digital advocates; they might even start noticing the compelling effectiveness evidence that already surrounds them. ■

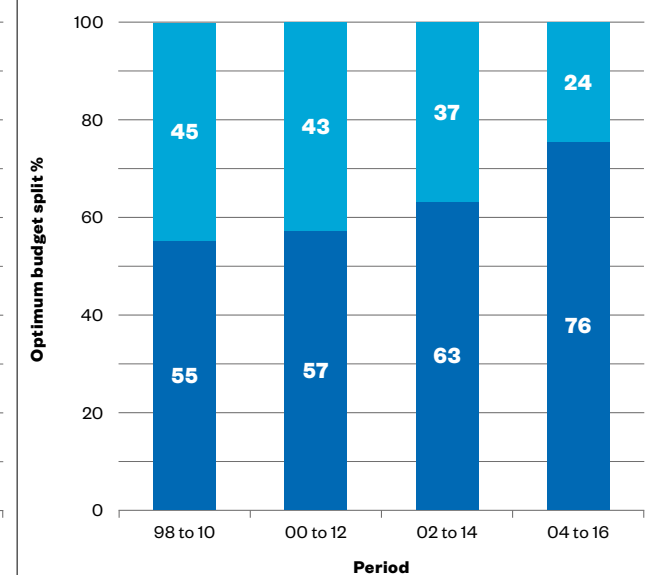
Online brands' optimum brand:activation balance is higher



■ Brand ■ Activation

Source: IPA Databank, 1998–2016 for-profit cases

The optimum brand:activation balance is trending higher



■ Brand ■ Activation

Source: IPA Databank, 1998–2016 for-profit cases

Remarkable awareness and growth: why online brands are on TV



Gideon Spanier
Global Head of Media, Campaign

Online brands have become the dominant advertisers in Britain's £5 billion-a-year TV ad market in the last three years. 2016 was a watershed year when this new generation of digital-native, challenger, disruptive brands became the top spenders on TV in the UK for the first time, according to Nielsen data.

Ecommerce and digital brands have increased their lead as a category since then as established advertisers in consumer goods have struggled with technological disruption and higher commodity costs, following sterling's decline in the wake of the Brexit referendum.

This is not just a UK phenomenon because disruptor brands such as Amazon and Google are now among the world's largest companies. Last year, Amazon hiked its global marketing spend to £6bn, including a large element of TV advertising, and it now rivals Procter & Gamble and Unilever as the world's biggest advertiser.

UK broadcasters are seeing a significant shift in their client base. ITV told shareholders at its investor day last year how digital disruptors have picked up the sponsorship of all its flagship entertainment shows since 2016. Just Eat sponsors The X Factor, Uswitch backs Britain's Got Talent, giffgaff has The Voice, Webuyanycar supports Dancing On Ice and Uber Eats has signed up for Love Island. Channel 4 and Sky have seen similar trends.

“Digital and ecommerce businesses say TV drives long-term brand-building and short-term sales performance.”



Ben Carter
UK Marketing Director,
Just Eat

Digital and ecommerce businesses say TV drives long-term brand-building and short-term sales performance. “TV, spanning spot to sponsorship, helps build our brand and has been transformational in the growth in our business,” **Ben Carter**, UK Marketing Director of Just Eat, says. “It builds top-of-mind awareness amongst a mass audience and it drives engagement and orders for our business by attracting new customers and getting our existing customers to order again. TV has helped us shape and grow the market.”

Online start-ups typically grow their businesses through search and social media, ecommerce and data during their early years, but this activity tends to work best at the bottom of the marketing funnel. Investing in established, mass media helps to raise awareness at the top of the funnel, build stature and even generate brand love.

“TV drives fame,” **Colin Gottlieb**, EMEA Chief Executive of Omnicom Media Group, which counts Uber and Airbnb as clients, says. “As the ecommerce players and fast-growth businesses optimise at the middle and bottom end of the funnel, they move to the most powerful brand-building medium, which is TV.”

The ability of TV to deliver mass, simultaneous reach and tell emotional stories in a brand-safe, regulated environment is vital for disruptor companies looking for ‘cut-through’ and credibility in a fragmented, media marketplace.



Colin Gottlieb
EMEA Chief Executive,
Omnicom Media Group

Just Eat sponsors
The X Factor on ITV





Richard Morris
UK Chief Executive,
Initiative



Zoe Harris
Chief Marketing Officer,
GoCompare

Linear, broadcast viewing is in gentle decline but commercial TV still reaches 97% of Britons a month, thanks in part to catch-up and video on demand, and new investors such as Netflix have improved the quality of programming.

Richard Morris, UK Chief Executive of Initiative, whose clients include Amazon and FairFX, says: “TV provides three things: it’s effective, accountable and it imbues trust on the brands that use it. ‘As seen on TV’ remains a powerful and enduring reason to use the medium and integration with mobile is further enhancing its value to clients.”

Zoe Harris, Chief Marketing Officer of GoCompare, says the communal nature of TV viewing is also important. “We’re big believers in shared viewing,” she declares, citing shows such as Channel 4’s Gogglebox. “TV programmes remain excellent conversation-starters and are a strong form of social currency.”

Gottlieb says the challenge for brand-building in the smartphone age has been that it “takes longer” and is “harder to measure in the short term” when companies expect instant results. However, TV has been able to show it can drive short-term direct response for digital businesses as well as building long-term brand value. Just Eat sold 500,000 meals during the final of The X Factor.

“TV provides three things: it’s effective, accountable and it imbues trust on the brands that use it.”



Cheryl Calverley
Chief Marketing
Officer, Eve Sleep

Cheryl Calverley, Chief Marketing Officer of Eve Sleep, says: “What’s happened with smartphones is my ability to turn TV into a ‘direct response’ medium is much greater. At every moment, you have a shop in your hands.” As for getting the balance right between brand and performance, she says: “There’s no TV that doesn’t do something for your brand or to your brand or doesn’t sell. It’s more about how you balance storytelling and short, sharp response messaging.”

Online brands own large amounts of first-party customer data and aren’t just interested in mass reach. They increasingly want to target ads through Broadcaster video on demand (BVOD) and online video channels.

“The emergence of BVOD and VOD enables us to appeal to a broader audience – and grow our reach.”

Top: Amazon, ‘A Big Collection of Small’.
Bottom: Amazon, ‘Singing Boxes’
weflip, ‘Lizard’



“We have a sophisticated TV buying strategy,” Carter says, explaining how Just Eat has been looking at “spot length, day parting and channel mix” to drive return on investment as viewing changes. “The emergence of BVOD and VOD enables us to appeal to a broader audience – and grow our reach.”

Start-ups must weigh carefully when to invest in advertising, ensuring that they have sufficient scale and a robust supply chain in place to cope with demand. Carter says the “key inflexion point” for Just Eat came when it had built a network of restaurant partners across the UK. “This meant we could run effective TV nationally and laid the foundations for our always-on TV strategy,” he says.

Just Eat launched in the UK in 2006 when smartphone and ecommerce adoption was in its infancy and it took time before investing in TV. Newer online brands have moved faster as they have the confidence of knowing TV advertising is a proven route to growth.

GoCompare launched a new energy-switching brand, weflip, in October 2018 and ran its first TV campaign in January 2019, which generated “remarkable awareness and brand metric growth”, according to Harris. “Without doubt consumer perceptions of telly being for big, proper, trusted businesses is helping us build the brand much more quickly than using digital media alone,” she says.

Broadcasters have been encouraging this new generation of disruptors onto TV. Channel 4 launched a commercial growth fund in 2015 that offers advertising airtime to start-ups in return for a shareholding.



Eve Sleep
giffgaff sponsors
The Voice on ITV



“TV has been absolutely key.”

Eve Sleep, one of Channel 4’s ‘media for equity’ investments, went on to float on the stock market just three years after it was founded and it now claims to be the UK’s fifth best-known mattress brand.

“TV has been absolutely key,” Calverley says. “We set out to build a brand, not just flog a lot of mattresses. If all we were about was flogging mattresses, it’s a dogfight to see who can do it marginally cheaper, and that’s a zero sum game, with no benefit for the customer. We needed to build brand equity so we could grow our product range, and grow our customer offering and repeat rate.” It took many months and did not only involve TV but it is paying off, according to Calverley. “That’s why we have 10% brand awareness versus our competitors at 5%,” she says.

There is a long way for the ecommerce revolution to run, which means new and existing players are likely to keep investing in TV. As Carter says: “We have to continue to invest in our brands, ensuring that they’re not only on top of mind, but they cut through because this marketplace is getting increasingly dynamic and noisy.”



A year of excellence

And the winners were...

The Thinkboxes 2018

If, at this point in our review, you are not overwhelmed by the wonder of TV – if you are merely whelmed – then this should do the trick. Brace yourself and gird your loins. Prepare for awe and admiration as we take a look at the creative TV brilliance from the top ads of the year.

The Thinkboxes creative awards honour not only the work itself but also, crucially, those responsible for bringing it to our screens – the clients who invest in TV creativity. The winners are chosen by our Academy of award-winning creatives and clients who know a thing or two about what makes a powerful and effective ad. It was a year of blockbusters, masterpieces and in-your-face originality. Congratulations go not only to the winners, but also to those who made the shortlists. All helped make 2018 another year of TV advertising excellence.



January/February 'Nothing beats a Londoner', Nike

Client Philip Jacobson
Agency Wieden+Kennedy
Director Megaforce
Creative Team Paddy Treacy, Mark Shanley, Tom Bender, Tom Corcoran, Joe Bruce
Production Company Riff Raff

The ad, by Wieden+Kennedy, has won widespread praise – and good-natured creative envy from the Thinkbox Academy.



I wish I'd done it so much it hurts.

Vicki Maguire
Chief Creative Officer, Grey



Absolutely phenomenal work, encapsulates London, in all its grime and glory, down to a tee.

Laura Jordan Bambach
Chief Creative Officer, Mr President

March/April 'Ghosts', IKEA

Client Kemi Anthony
Agency Mother
Director Dougal Wilson
Creative Team Mother
Production Company Blink

Matt Davis, Executive Creative Director at Red Brick Road and a Thinkbox Academy member said: "IKEA tickles us deliciously while weaving a tale that balances the retailer's slightly out-of-reach and fantasy feel with a superbly solid insight."



Being a little scared is important – it stops you from playing it too safe. We want great, not nice.

Kemi Anthony
Advertising Manager for UK & Ireland, IKEA



Making the best TV ad you can comes down to staying true to a really simple, insightful idea throughout the entire process. And never losing sight of it. Ever.

Ana Balarin & Hermeti Balarin
Partners, Mother



May/June 'Togetherness', Oasis

Client Agnieszka Rola
Agency The Corner London
Director Jamie Delaney
Creative Team Robert Amstell, Matthew Lancod
Production Company Black Dog Films

Rob Fletcher, Executive Creative Director at Isobel and a Thinkbox Academy member, singled out the ad for praise in his review of the May/June Thinkboxes shortlist. "I love the Oasis campaign and this ad in particular, because it is honest and real. It talks to the real me, the one I pretend I'm not."



A true and powerful insight has to be at the core of any script for us to invest in.

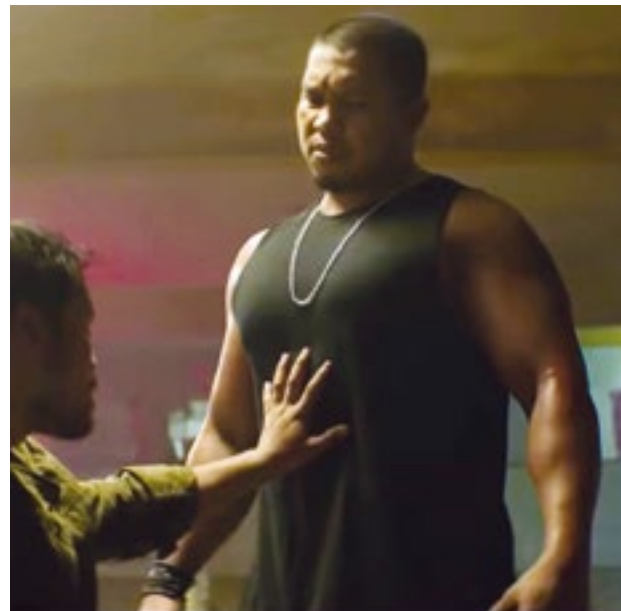
Gemma Barnett
Stills Portfolio Manager, Coca-Cola UK, which owns the Oasis brand



Any great TV makes you forget about everything but that one thing. It sucks you in.

Matthew Lancod & Robert Amstell
Creative Directors formerly The Corner





September/October 'Bohemian Rhapsody', John Lewis & Partners and Waitrose & Partners

Client Craig Inglis, Becky Brock
Agency adam&eve/DDB
Director Dougal Wilson
Creative Team Richard Brim, Tim Vance, Paul Knott
Production Company Blink productions

This epic ad sees schoolchildren and their teacher create an extraordinary school play – joyously performing the Queen hit Bohemian Rhapsody, with a climactic guitar solo and a giant silver rocket.



What we love most about it [the ad] is the level of detail – every time you watch it there is something else: another moment which you haven't seen before. It evokes so much joy, and a real sense of pride.

Martin George
Customer Director,
Waitrose & Partners



We wanted the story to be an iconic, cinematic experience. The performances needed to be spot-on. At the heart of this film are touches of real humanity.

Paul Knott
Creative Director,
adam&eve/DDB



The role of the TV ad in the wider campaign was to generate fame and emotional resonance.

Tim Vance and Paul Knott
Creative Directors,
adam&eve/DDB



July/August 'Escape', Audi

Client Laura Brennan
Agency BBH
Director Matthijs van Heijningen
Creative Team Ian Heartfield, Marc Rayson, Callum Prior
Production Company MJZ

The brief here was to make technology playful and thrilling and this ad delivered with a martial arts spectacular.



A really good TV ad idea will show, as opposed to tell. It'll treat the subject with wit and panache, crediting the viewer with intelligence and engaging them.

Benjamin Braun
Marketing Director,
Audi UK



November/December 'The boy and the piano' John Lewis & Partners

Client Craig Inglis, Becky Brock, Liz Le Breton, Emma Wood, Holly Kicul
Agency adam&eve/DDB
Director Seb Edwards
Creative Team Mike Sutherland, Ant Nelson, Richard Brim
Production Company Academy Films

The Thinkbox Academy was decisive with its Christmas pick this year. Academy member and joint ECD at The&Partnership Micky Tudor said "In ad world, that perennial perfect gift giver is John Lewis. They just keep on getting it right."



I think it is all in the strength of the story. Whether it elicits an emotional response is the basis for any great TV ad.

Becky Brock
Director of Marketing,
John Lewis & Partners



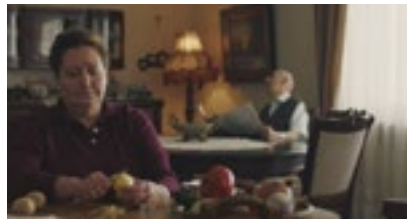
It's the biggest brief of the year and one that everyone sacrifices their evenings and weekends for.

Ant Nelson
Joint ECD,
adam&eve/DDB



More TV brilliance from The Thinkboxes

January/February



Ancestry, 'Together forever'
Droga5



HSBC, 'Global Citizen'
JWT



Cadbury, 'Mum's birthday'
VCCP



Lloyds Bank, 'Get the inside out'
adam&eve/DDB

March/April



OVO Energy, 'It's time to power your life differently' Uncommon



Guinness, 'Goodluck'
AMV BBDO



Jaguar Land Rover, 'Cake Stall'
The Outift



The Royal Navy, 'Louise's Story'
WCRS

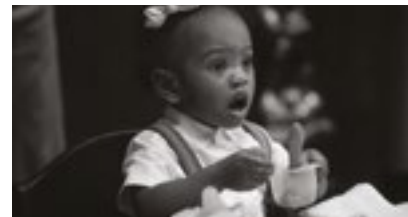
May/June



Lurpak, 'Smooth'
W+K London



Nationwide, 'Mortgage Number One'
VCCP



Sainsbury's, 'The Toughest Critics'
W+K London



Vimto, 'I see Vimto in you'
Quiet Storm

Aside from our deserved winners, many more top quality ads made it onto the podium. The raft of creativity in 2018 made picking winners a tricky job for our Thinkbox Academy. Take a look at the wonderful work below that made the shortlists and you'll see why.

July/August



BT Sport, 'Take Them All On'
AMV BBDO



Tena Men, 'Odyssey'
AMV BBDO

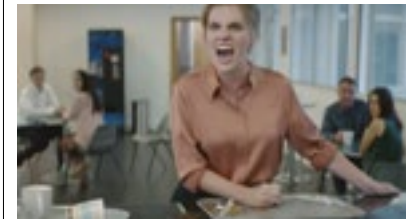


Halifax, 'Ghostbusters Contactless'
adam&eve/DDB



NHS, 'We are the NHS'
MullenLowe London

September/October



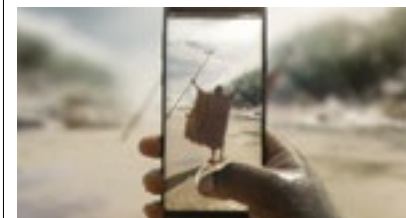
Amazon, 'Vikings'
Droga5 London



The Department for Education, 'Every Lesson Shapes a Life' Havas London



Dolmio, 'Battle of Dinnertime'
AMV BBDO



Three, 'Phone history #phonesaregood'
W+K London

November/December



Amazon, 'Singing Boxes'
Lucky Generals



KFC, 'Crossroads'
Mother



Waitrose & Partners, 'Fast Forward'
adam&eve/DDB



Sainsbury's, 'The Big Night'
W+K London

TV ads in 2018: how far have we come?



Rosie Arnold
President, Thinkbox Academy

This time last year I set out my agenda/hope for society-changing ideas that harness the power of TV. It was a call to creatives to make ads that are not only entertaining and effective, but that also challenge stereotypes and better reflect society.

In a year that saw a lesbian couple rush to the hospital to have a baby, an entire ad break broadcast through the eyes of those with sight loss, and menopausal women talking about hot flushes, it feels like we're taking steps in the right direction. I asked some vocal campaigners of diversity and inclusion in the industry to pick the work from 2018 that stood out to them. Here they are...



JAN GOODING STONEWALL →

'This is belonging', British Army Karmarama

The British Army's 'This is belonging' campaign is an outstanding example of embracing inclusion. It took many by surprise, as made manifest by the outcry that then ensued. Critics accused it of being too politically correct and 'soft', with its claim that 'having your voice heard' or 'keeping your (Muslim) faith' would be accommodated in army culture.

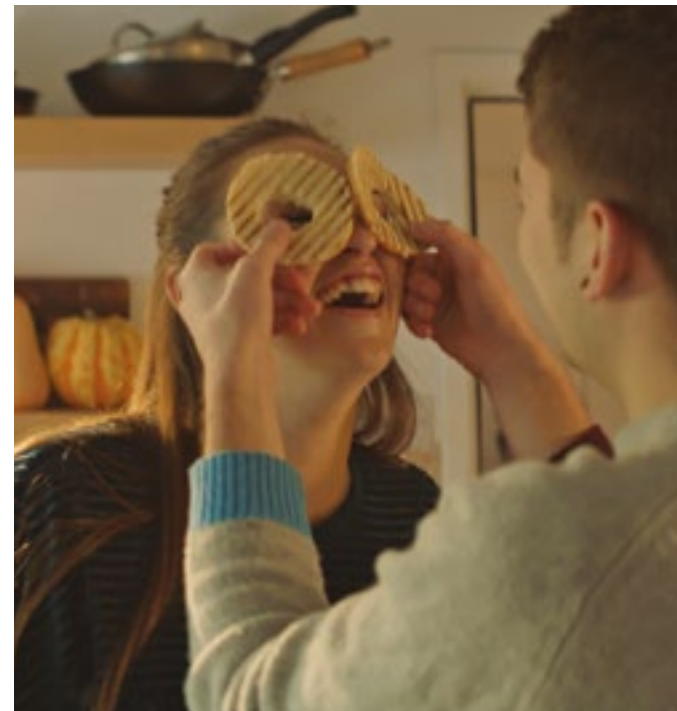
Let us be in no doubt. This campaign is not simply being altruistic, but a result of poor recruitment figures resulting in the Army needing to appeal to a much broader base of young people. However, it is also consistent with the realisation that diversity brings other benefits too. The British Army doesn't just fight other people. It is also deployed on peacekeeping missions, and has to engage effectively with populations with very different beliefs and experiences to its own. It stands to reason then that the more diverse its own talent, the more intelligent the operational decisions they make should be. This is brave advertising that will surely attract brave people.



“

This is brave advertising that will surely attract brave people.

”



SAM PHILLIPS OMNICOM MEDIA GROUP ←

'Here's To Love', McCain's adam&eve/DDB

To lay my chips on the table, McCain's 'Here's To Love' (kudos to the client, adam&eve/DDB, PHD) was 2018 TV inclusion gold.

Built around the finding that 84% of consumers couldn't recall seeing a family like theirs anywhere in popular culture, McCain's joyful smashing together of people who just happen to be lesbians, have disabilities, be a different ethnicity to their partner, be older than the advertising norms, and more besides isn't diversity and inclusion going far; it's diversity and inclusion starting to reflect the manifold realities of today's Britain. Metrics show it really worked for the client too. More please!



DANIELE FIANDACA UTOPIA AND TOKEN MAN →

‘Get the inside out’, Lloyds adam&eve/DDB

I loved this series of ads which brings to the fore the issue of mental health and highlights the importance of ending the stigma and making it a part of everyday conversation. By using such a diverse selection of people, it also cleverly reminds us that mental health issues can affect us all.

As a business Lloyds are known to be one of the leaders in the inclusion and diversity space and as a partner of Mental Health UK are clearly looking to tackle mental health issues within the workplace. It’s refreshing to see a major business genuinely championing this cause.

“

It cleverly reminds us that mental health issues can affect us all.

”



SIMON REDICAN PUBLISHERS AUDIENCE MEASUREMENT COMPANY ←

‘Every lesson shapes a life’, Department for Education Havas London

This ad is moving, aspirational and true to real life. It taps into exactly why someone would want to teach and shape young lives for the better.

It is also refreshing to see an ad featuring working-class people that doesn’t involve characters (caricatures?) flogging DIY, gambling or fast food while growling away in semi-threatening tones. We have never had more need of great teachers, and I’m sure this ad will play its part in recruiting them. The only nagging question is did it get enough exposure? I would say not, which sadly speaks volumes about our current twisted priorities.



ALI HANAN CREATIVE EQUALS →

‘Somewhere over the rainbow’, Pride in London BMB

In 2018, my 15-year-old mascara-wearing son and his gender-fluid glitter-tastic crew headed to Pride in London. For them, they feel the ‘work’ on LGBTQI rights is ‘done’, where acceptance is the norm (they think my generation is SO ‘genderist’).

As this ad shows, the work is far from done. Two in five trans people, according to Stonewall, have had to deal with a hate incident in the past 12 months. We have a long way to go to get a place ‘somewhere over the rainbow’. This haunting song from the Wizard of Oz is spot on, insisting there is another reality to the one that happens now. The ad moves from scenarios of violence, rejection, humiliation and hate to a place of affinity and love, where real-life couples celebrate the children they are bringing into the world. It’s a message of hope – and an affirmation that #PrideMatters.



ETE DAVIES ANALOGFOLK ←

‘Labels are for clothes’, River Island Studio Blvd

For me, the best ad – and overall campaign – for inclusion and representation in 2018 was River Island’s #labelsareforclothes.

As a form of very personal creativity, fashion should always be about self-expression and a celebration of identity. Making your statement to the world about who or what you are, or choose to be.

Historically, however, it has been the opposite. There’s always been an unattainable ‘ideal’ – and over the last decade social media has only exacerbated this stereotyping and body-shaming.

Thankfully, we’re now seeing a response to this with body-positivity and a drive for fashion advertising that’s more representative of the wider world. River Island’s #labelsareforclothes campaign does this brilliantly.

It’s the brand speaking authentically to its audience about what fashion is about – freedom of self-expression without prejudices.

Thinkbox TV Planning Awards 2018

The TV Planning Awards bend the knee to the best of the latest in TV planning. In 2018 we were spoilt with an exceptional standard of work showcasing some of the freshest and most creative media planning. A rise in contextual advertising, ever-more specific targeting of audience segments, and increasingly close collaboration between brands and broadcasters resulted in solid entries, a strong shortlist and some invincible winners. Read all about the champions here...

Grand Prix & Best use of content Breaking the last taboo, Manning Gottlieb OMD for Age UK

Age UK is at the forefront of helping older people and raising awareness about age-related issues such as loneliness.

Manning Gottlieb OMD created layers of activity to bring this sensitive issue to the fore and help people to understand its complexities. A key component of this was the creation of a one-off Christmas Special TV documentary. The programme – Old People's Home for Four Year Olds at Christmas – was the perfect fit.

There were branded promos and social media activity to promote the show in advance and contextually relevant ads that went out first in break during the programme.

It was a resounding success with huge increases in volunteers, donations, website traffic and social mentions alongside an increased awareness of the important work that can be done to improve the loneliness and social isolation facing older people in the UK.

SHORTLIST: BEST USE OF CONTENT

MediaCom F&F
PHD & Drum Warner Bros
the7stars Suzuki





Best use of TV innovation
More important than TV innovation, Manning Gottlieb OMD for Specsavers

Specsavers are on a mission to help end avoidable sight loss and so, in 2017, it focused on getting eye-test avoiders to come in for a check-up.

Manning Gottlieb OMD know that high-impact TV campaigns that get people talking change behaviour, so they created an 'impact index' which allowed them to pinpoint the exact moments on TV that had the biggest impact on its target audience. From this it produced a bespoke list of 33 spots that would generate the biggest buzz.

Working with Channel 4 and Sky, it created contextual ads for every single spot that referred to what the viewer had just been watching. It even made five live ads on the day of broadcast that referred to whatever the most talked-about subject was on that day.

The results were outstanding with substantial increases in awareness, searches and buzz. But best of all, Specsavers tested 40,000 more eyes than the same period the previous year.

SHORTLIST

Havas PayPal
MediaCom Cancer Research UK



Best newcomer to TV
Outsmarting not outspending, MullenLowe Mediahub for Western Union

With banks the default option for sending money abroad, and digital innovators making big gains, Western Union was caught between the old and new worlds. MullenLowe Mediahub needed to grab it an unfair share of attention – to outsmart, not outspend.

TV was chosen as the most effective channel to drive awareness, deliver brand reappraisal and give the brand credibility and make it “for everyone”. Focusing on payday changed everything. It made the budget go further, drove share of voice at specific times, and drove relevance when money was most front of mind. Sky’s AdSmart also reached the custom audience of international money-transfer users with smartphones.

TV was supported with time-synced online activity and a multi-touchpoint campaign to create and sustain momentum.

It paid off. Western Union recorded impressive results across both brand and business metrics – so much so, in fact, that TV is on the plan for a second year in a row, with a bigger and bolder campaign.

SHORTLIST

All Response Media Pharmacy2U
PHD & Quiet Storm Pukka Pies



Best use of TV and...
TV and... other screens, OMD UK for easyJet

TV has been the linchpin of easyJet’s marketing since 2010, fuelling incredible growth. But in 2016, following the exchange rate crash and increased competition, OMD set out to supercharge the airline’s beloved brand-building TV with a rigorous AV plan, founded on the latest data and technology opportunities. This aimed to fit the audience’s evolving AV habits, drive brand preference and reduce price sensitivity.

At the core of this was a relentless pursuit of extra reach – across all screens and formats – but with a keen eye on the quality of the viewing experience. It also deployed the linear TV equivalent of ‘negatively retargeting’ to drive unique reach and used Sky’s first-party data and AdVance technology to connect with the lightest TV viewers, both on and off Sky’s platforms.

Facebook activity enabled OMD to identify the audiences most engaged with the brand, which was then fed back into the TV programming selection.

The agency’s communications strategy, led by TV, delivered fame and business success, with brand consideration up 10%; passengers travelling with easyJet up 8.5%; and the carrier’s revenue jumping 8% year-on-year.

SHORTLIST

Manning Gottlieb OMD Virgin Trains (Highly Commended)
Bountiful Cow Movember



Best ongoing use of TV
A love affair with TV over time, OMD UK for McDonald’s

In 2010, despite a growing number of restaurants, McDonald’s was suffering from declining brand health and static sales – plus a raft of new entrants into the market. It decided to refocus. Its ambition? To become Britain’s best-loved restaurant company. Communications, marshalled by OMD and Leo Burnett, would have a huge role to play in re-energising McDonald’s success. And it would be crucial to balance head and heart to drive short- and long-term sales.

With its flexibility and power to make the nation cry, buy, laugh and comment, TV has been consistently chosen as McDonald’s lead channel as it evolved its approach over time.

- Monopoly drove short-term sales with a highly optimised AV & programming mix.
- The 40th anniversary celebrations increased brand love at scale.
- McCafé Moments, a market-leading partnership with Channel 4, drove increased brand perceptions – and sold a lot of coffee.
- The Signature Collection used Sky AdSmart to launch regionally, and went on to sponsor the Six Nations rugby tournament to land brand attributes.
- And it cut through the Christmas clutter with the brilliant #ReindeerReady.

Over the past five years, increased investment in both TV and Broadcaster VOD has delivered increased ROIs and over 50 consecutive quarters of growth.

SHORTLIST

The Specialist Works soak.com
Wavemaker Nationwide



Best use of sponsorship
Delivering the perfect night in, m/SIX for Just Eat

m/SIX had a three-fold challenge for Just Eat: create brand fame, increase online orders, and engage restaurant partners.

Sponsoring ITV's The X Factor put the brand front-of-mind every Saturday night, when the target 18–34 audience were most likely to order takeaways.

And the idents showcased talented restaurateurs and drivers, plucked for fame from over 3,000 applicants.

The partnership included a co-funded online spin off show Xtra Bites, which helped Just Eat talk to fans beyond the weekend; a second screen app where viewers could vote in polls and click to order; some clever off-air licencing; and on-air brand exposure throughout the show itself. It also provided a launchpad for a new TV ad.

The sponsorship served up three consecutive record Saturdays for Just Eat, and The X Factor final generated half a million orders, their biggest-ever Saturday. TV delivered.

- SHORTLIST**
- Carat Wickes
 - MediaCom North Tombola
 - m/SIX Tate&Lyle



Special award:
Best low budget use of TV
Continuity Bat, PHD & Drum for Warner Brothers

In February 2017, Warner Bros launched The Lego Batman Movie. To ensure success, it needed to promote the movie to 16–34s, alongside the studio's normal family audience, and in a way that created a big impact on opening weekend.

To bring Lego Batman's comic self-assurance to life and at a big enough scale, PHD conceived 'Continuity Bat' – a content partnership that allowed the character to become the self-appointed continuity announcer during primetime on Channel 4.

They created 18 different pieces of animated content, specially written and produced to introduce Channel 4's most popular shows, across four days just before the movie's release. Lego Batman also took over Channel 4's official Twitter feed to comment on the shows he'd introduced.

The movie opened at number one in the UK Box Office. The proportion of 16- to 34-year-olds seeing the film was 18% higher than average, and one in six of those who saw 'Continuity Bat' booked a ticket to see the movie.



Special award:
Best use of TV for PR
Live from inside the human body, MediaCom for Cancer Research UK

Cancer Research UK wanted to demonstrate that the research it is doing is having a real and tangible effect on cancer treatment and prevention. Many people don't believe that cancer can be beaten, even though the survival rate has doubled over the past 40 years because of the research being done.

MediaCom suggested doing something to make a big impact, show that cancer is being beaten right now and encourage people to donate and get checked. In a global broadcasting first, it aired live coverage of a colonoscopy during an ad break in A New Life in the Sun on Channel 4. It drove awareness by broadcasting 10-second teasers during some of Channel 4's biggest shows in the week before the live event.

The TV broadcast was supported by Facebook Live activity and a PR campaign that made headlines in The Guardian, The Sun, The Times and Daily Mirror, among other news outlets.

Cancer Research UK recorded an uplift in web visits to its fundraising pages and an increase in bowel-cancer information downloads, while 30% more people called the NHS bowel-cancer helpline.

The Judges

- Andrew Mallandaine**
Sales Director, Turner
- Andrew Stephens**
Founding Partner, Goodstuff Communications
- Charlie Ebdy**
Chief Strategy Officer, Vizeum
- Claire Hilton**
Managing Director – Global Brand and Insight, Barclays
- Frances Ralston-Good**
Chief Executive, Hearts & Science
- Jason Spencer**
Business Development Director, ITV
- Jennifer Carey**
Deputy Head of Marketing, Channel 4
- Jeremy Lee**
Contributing Editor, Campaign
- Lindsey Clay**
Chief Executive, Thinkbox
- Lucy Jameson**
Co-founder, Uncommon
- Nick Ashworth**
Marketing Director, DFS
- Olivia Stubbings**
Strategy Director, AMV BBDO
- Rian Shah**
Managing Director, Zenith UK
- Russell Place**
Former Managing Director, UM Worldwide
- Sam Gaunt**
Head of Media, Lidl UK
- Sue Unerman**
Chief Transformation Officer, MediaCom
- Tess Alps**
Chair, Thinkbox
- Tom Roach**
Managing Partner, BBH
- Zoe Harkness**
Head of Planning, Thinkbox

The appliance of marketing science:

The IPA Effectiveness Awards 2018

Effectiveness is to Thinkbox what dragons are to Daenerys Targaryen, what eggs are to Bake Off, and what The Rovers Return is to Coronation Street. That is why sponsoring the peerless IPA Effectiveness Awards is something we are fanatically proud of doing.

This year, the top prize went to BBH, Effectiveness Agency of the Year, for their consistent success for their work with Audi which has seen them transform the business over many years. But across the board, the winners of these rigorous awards provide us with a rich resource with which to answer the most challenging questions facing marketing communications. Here, we feature five crackers from this year's crop of excellence and look at the evidence-based thinking that helped deliver their success.

thinkbox

IPA

BBH for Audi

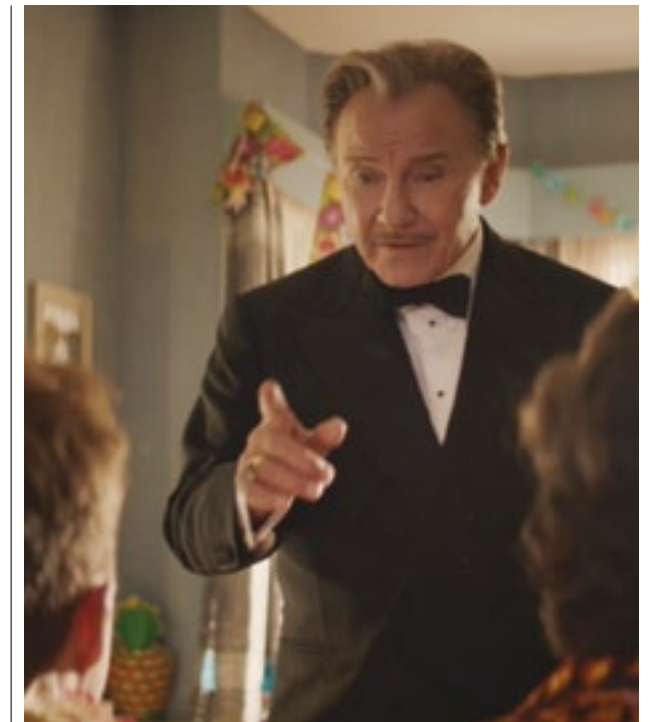
Beauty and brains: how we supercharged the Audi premium 2015–2018

Grand Prix winner

Audi needed to supercharge its premium to grow. Between 2015 and 2018 they did this by defining the feeling of 'progressive premium' and telling the story of 'beautiful cars with amazing brains'. The result was a new chapter in the Vorsprung durch Technik journey, a creative high point for Audi and a return to dominance in perceptions around innovation and brand desire. This helped sell more cars at higher specification, grow 3x faster than the UK market, increase lifetime customer value, create £1.8bn of incremental sales, and deliver their highest-ever profit ROMI.

LEARNINGS

- Established, consistent and effective brands can unlock progressive thinking through research and data. This is a rare case study in how to premiumise in automotive.
- A brilliant reminder of the power of creativity. By understanding what modern premium needed to feel like, and bringing it to life famously, emotionally and distinctly across multiple media, they supercharged desirability and sales.
- Sometimes the best way to excite consumers about your brand is to keep things simple.



Direct Line Group & Ebiquity for DLG

They went short. We went long.

Gold Winner

DLG had to demonstrate the business case for marketing its multiple insurance brands: Direct Line, Churchill and Privilege. The company analysed what factors drove sales at each brand, measuring the contribution of brand and acquisition activity over the short and long term. It used these learnings to set investment priorities across its portfolio, including more focus on brand-building TV, improving propositions and customer service. Brand preference and consideration rose across the portfolio, total customers increased, and some £46m profit was contributed to its home and motor insurance businesses.

LEARNINGS

- If you can articulate precisely the short- and long-term impacts of your marketing investment decisions, you can change the tone of conversation within the business.
- Great TV creativity is marketing gold, as demonstrated by the consistently excellent and distinctive Harvey Keitel series from Saatchi & Saatchi.
- Here's the art of long-term brand building in action, reminding us of one of its most important advantages: lowering price sensitivity.

TBWA\London
& Starcom for Lidl
How Lidl grew a lot

Gold Winner
This is a 'before and after' story. Before 2014, Lidl focused on short-term deal and offer marketing – 100% activation. After, there was a big investment in high-reach advertising media, especially TV, with messaging tackling brand perception alongside price and promotions. Some £2.7bn of direct and long-term sales were generated, with a £398m net profit delivered over four years.

- LEARNINGS**
- Here are the rewards that can be achieved when you commit to consistent and heavyweight advertising investment in broad-reach media, at levels ahead of market share.
 - Powered by some brilliantly conceived and executed TV creative work, Lidl's campaign has driven fame, mass penetration and growth over the short and long term.
 - Lidl applied learnings from the Double Jeopardy law – where brands with less market share have fewer buyers, and these buyers are slightly less loyal – to reveal that the path to growth was to get Lidl in the repertoire of all category shoppers.
 - This is a study in how advertising helps brands grow: the observations of Binet & Field and Byron Sharp made flesh.



adam&eve/DDB
& Carat for the AA
The AA: from spark
plugs to singalongs

Gold Winner
The AA had been focusing on efficient delivery of short-term results via direct, targeted comms. This seemed to be working – profit was growing. But a new team looked beyond short-term results and discovered a worrying picture of market share and membership decline, driven by increased price sensitivity and falling salience. So, the AA overhauled its marketing and re-invested in brand communications. The resulting campaigns rebuilt salience and image, increasing acquisition, retention and price elasticity.

- LEARNINGS**
- Appearances can be deceptive. Underlying problems can be masked by a brand's impressive short-term successes. For the AA, it was only after looking beyond these short-term metrics that the true commercial risks of short-termism began to emerge.
 - By embarking on a more balanced strategy, based on Binet & Field's 60:40 rule, where brand-building and sales-driving work in harmony, they were able to reverse their fortunes and deliver the AA back into growth.
 - Fame, reach and emotional communications were at the heart of this recovery, led by TV, with posters and radio lending further scale and frequency.

BBH & Ebiquity for Weetabix
A Rembrandt in the attic:
Rediscovering the value of
'Have you had your Weetabix?'

Silver Winner
Looking back is unfashionable in marketing. Creative people love to recreate. Clients and agencies get bored of ideas years before consumers do. But in this case, looking back helped the brand go forward. Bringing back 'Have you had your Weetabix?' dramatically improved the effectiveness & efficiency of their marketing, doubling advertising's sales impact and tripling its ROI.

- LEARNINGS**
- Consumers respond far better to marketing when it's a combination of the new and the old, the fresh and the familiar, the distinctive and the consistent.
 - BBH's forensic approach to evidence-based thinking – from neuroscience to implicit association research – uncovered the value of distinctive brand assets and gave the business and its investors the confidence to invest behind them. They worked with existing memory structures from the brand's history rather than generate new equity from nothing.
 - Econometrics also played a major role, with Ebiquity & Gain Theory's 'Profit Ability' findings helping to focus media money where it would make the most impact on profit and deliver the lowest cost per reach: TV.



Further reading
To read these, and many more brilliant IPA case studies, in full, pop along to the IPA website: ipa.co.uk

Effectiveness in Context
Les Binet & Peter Field for the IPA

Profit Ability: the business case for advertising
Ebiquity and Gain Theory

The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies
Les Binet & Peter Field for the IPA

System1: Unlocking Profitable Growth
John Kearon, Orlando Wood and Tom Ewing

How Brands Grow: What Marketers Don't Know
Byron Sharp

Culture F1rst
Fran Cassidy for the IPA

Selling Creativity Short: Creativity and effectiveness under threat
Peter Field for the IPA

Charts every advertiser should cherish

More than perhaps at any other time, the last 12 months have seen effectiveness move to the centre of the advertising industry – the place it should always have been. It feels like we are leaving a period during which too many eyes were turned by seductive hyperbole and alluring dashboards and moving into a time of more rigorous analysis of the facts about what works.

And we have never had the facts so good, with effectiveness study after effectiveness study being published by a host of respected organisations, from **Ebiquity** to **Enders** to the **IPA** to **Gain Theory**. So, it feels like the perfect moment to ask some of the leading minds in advertising effectiveness to come together and choose one must-see chart to compile the cream of the effectiveness evidence. These are the charts no advertiser should ignore.



LES BINET ADAM&EVE/DOB

The Zig Zag Chart

Most marketers assume that, if you look after the short term, the long term will look after itself. This chart explains why this is dangerously wrong. The key is to understand that marketing works in two very different ways.

Sales activation aims to get an immediate behavioural response. Activation is good for short-term selling, and ROIs can be high. But the effects don't last long, and do little to foster long-term growth.

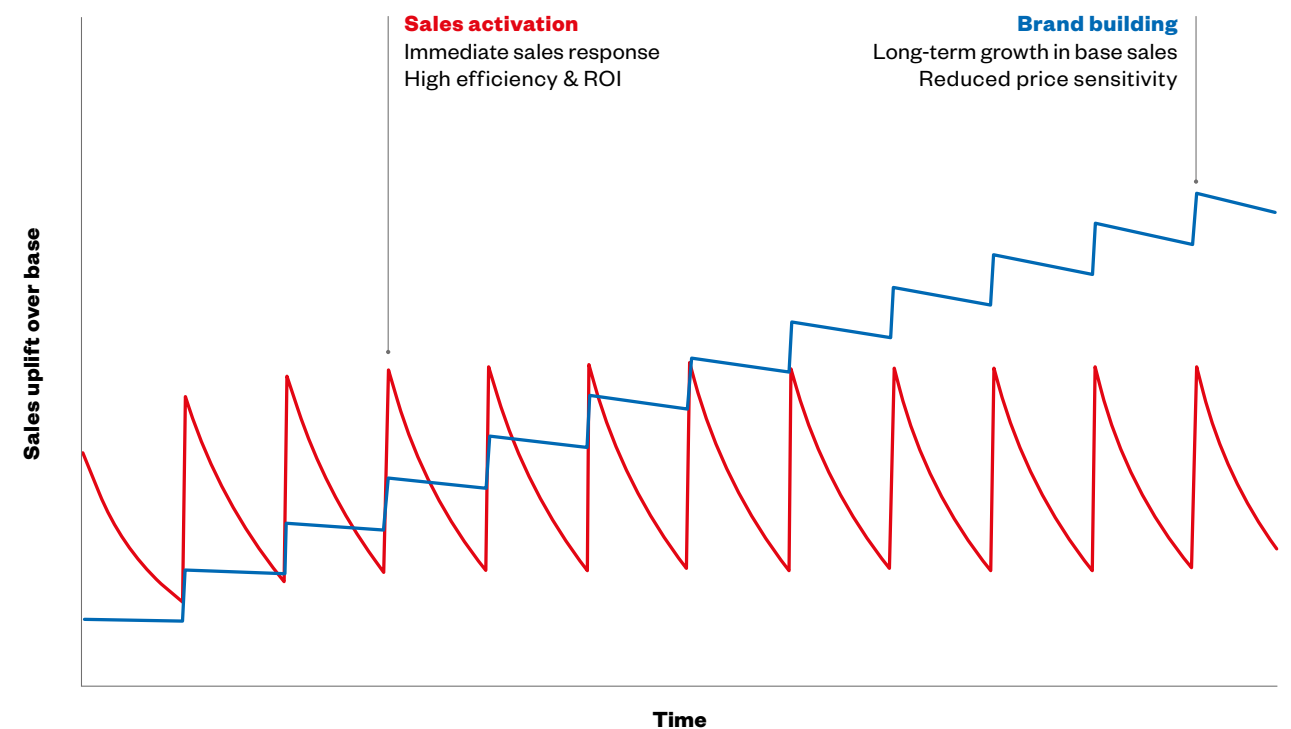
Brand activity creates long-term memories, associations and habits which influence consumers for years to come. This is a harder job, requiring repeated exposure, but the effects last longer and accumulate over time to drive growth and long-term profit.

Businesses need both. They need brand activity to create demand, and they need activation to convert demand efficiently into cash. When the balance is right, each enhances the other. But brand building is always the primary driver. Short-term selling is never enough.

“Brand building is always the primary driver. Short-term selling is never enough.”

KEY FINDING

Marketing works in two ways.



Source: Binet & Field 2013



ALEX STEER WAVEMAKER

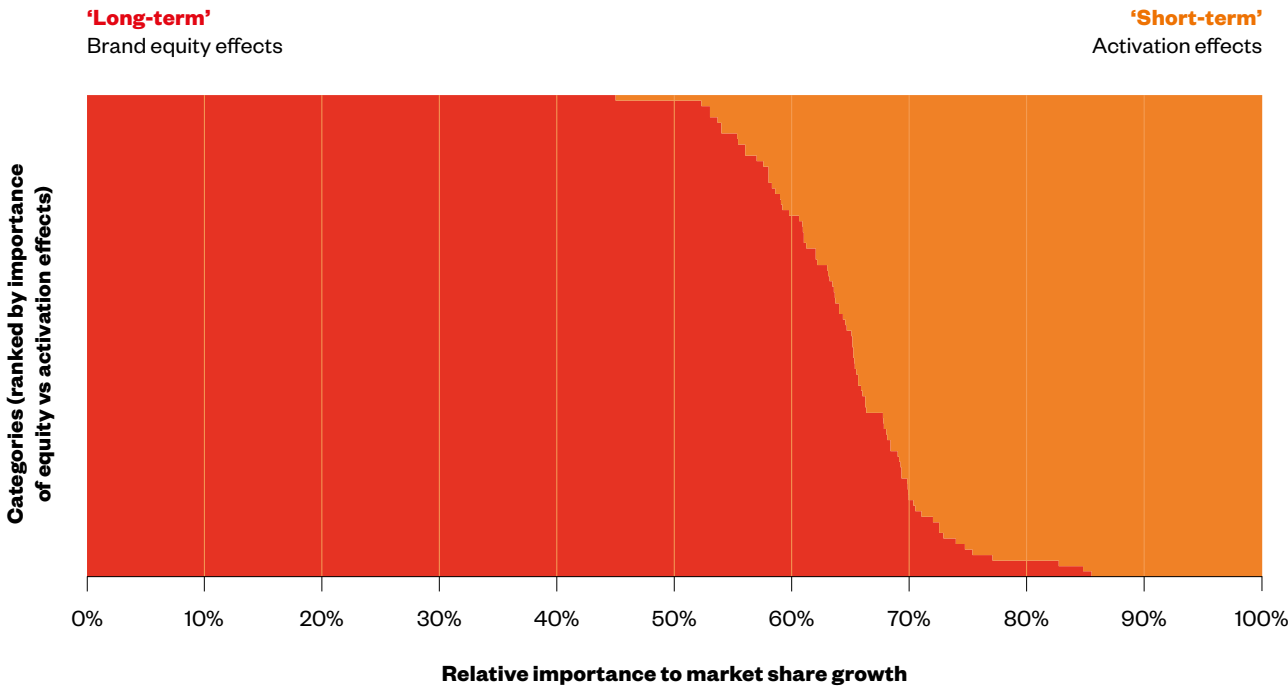
The brand:activation ratio, by category

At risk of nepotism, my favourite chart comes from Wavemaker's own benchmarks database. The chart shows what we found. Each category differs in the relative importance of brand equity (built over the long term, before consumers enter the market) and activation effects (generated in the short term, when they are in-market). But there is a clear and consistent shape. Across more than 100 categories, long-term effects always contribute between 50% and 85% of communications impact on market share. And across all those studies, the average ratio of long-term to short-term converges at – guess what? – about 60:40.

In categories where consumers switch more easily, are swayed by pricing, or research heavily, activation effects tend to be larger – but even here, brand effects always have the edge. Does this mean you should always spend 60% of your budget on 'brand'? No – your category, your brand's immediate circumstances, and the day-to-day demands of the market all need to be considered. But in the long run, successful brands invest in building the sustained equity that becomes the engine of consumer and shareholder demand. It is one of marketing's laws of physics, and no marketer who cares about growth can afford to ignore it.

KEY FINDING

The '60:40' norm varies by category, but there's a clear overall relationship between brand and activation effects.



Source: Wavemaker/BrandZ benchmarks database. (60,000 brand case studies over 11 years)



TOM ROACH BBH

Your fans are not your most valuable consumers

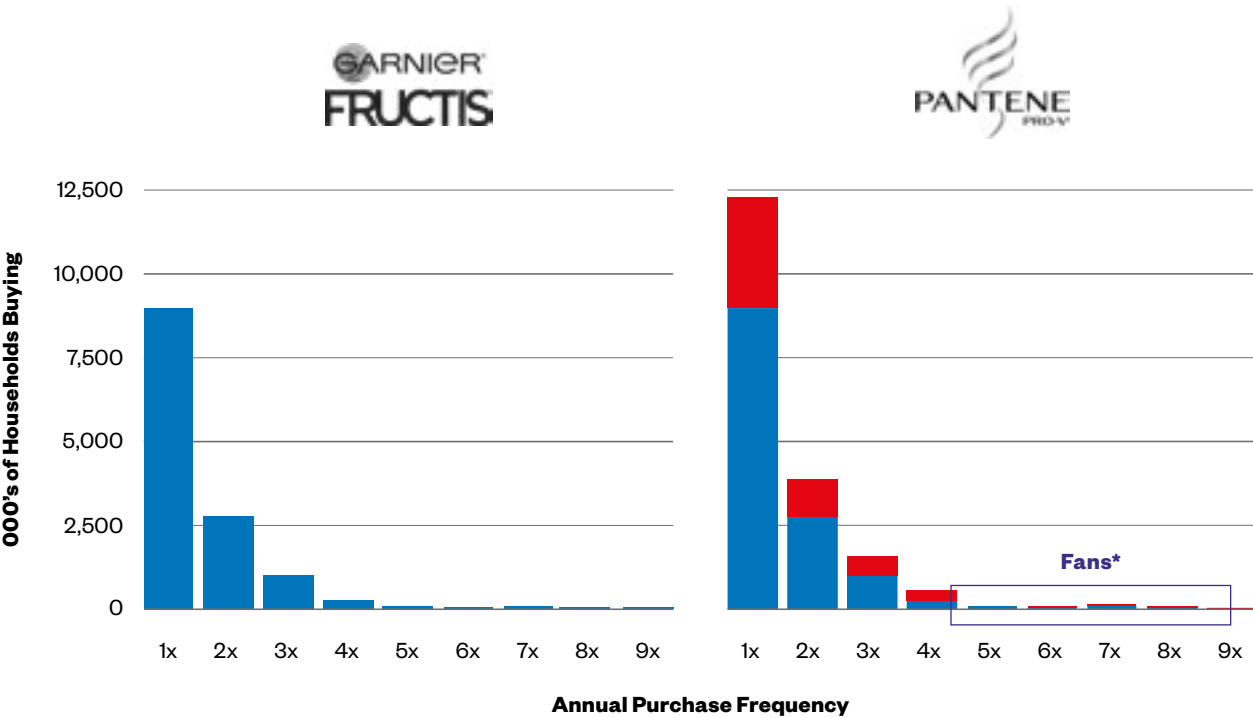
If I had to choose one marketing chart above all others it would be this rather ordinary-looking bar chart, or some version of it, which is arguably one of the most significant in all of marketing. At its simplest it just shows the importance to all brands of very light buyers and the relative unimportance of very heavy buyers: "The unbearable lightness of buying", in the words of Wiener Snijders. But from that simple observation many other important ideas flow and other marketing myths, such as the importance of brand fans, begin to have their flawed logic exposed. If you haven't yet made your own brand's NBD (negative binomial

distribution) chart, I seriously suggest you make one. It will help neutralise the distorting effect of working up close with a brand, reminding you that your brand's growth depends on regular people who will need a little mental nudge and some attention-grabbing, well-branded communication to help them remember it next time they're in the market.

“If you haven't yet made your own brand's NBD chart, I seriously suggest you make one.”

KEY FINDING

Targeting 'fans' who frequently buy the product is likely to make little difference to volume of sales.



Source: Martin Weigel, How to Not Fail. Nielsen

■ Incremental numbers of buyers of Pantene vs. Fructis

* Fructis can't match Pantene in size by just targeting fans



FRAN CASSIDY CONSULTANT

The importance of long-term effects

My favourite effectiveness chart is from 'Profit Ability', the brilliant study by Gain Theory and Ebiquity. Three reasons:

- 1. The majority of a company's value will come from profitable sales made in the future. This chart reveals the potentially catastrophic effect on profit for brands obsessed with short-term performance. Indeed, it perfectly highlights the misnomer of the phrase 'performance marketing'.
- 2. It quantifies the necessity for better balance between short-, medium- and long-term objectives for brands searching for sustainable profit and long-term cash flow. It's therefore essential ammunition for discussions with finance.

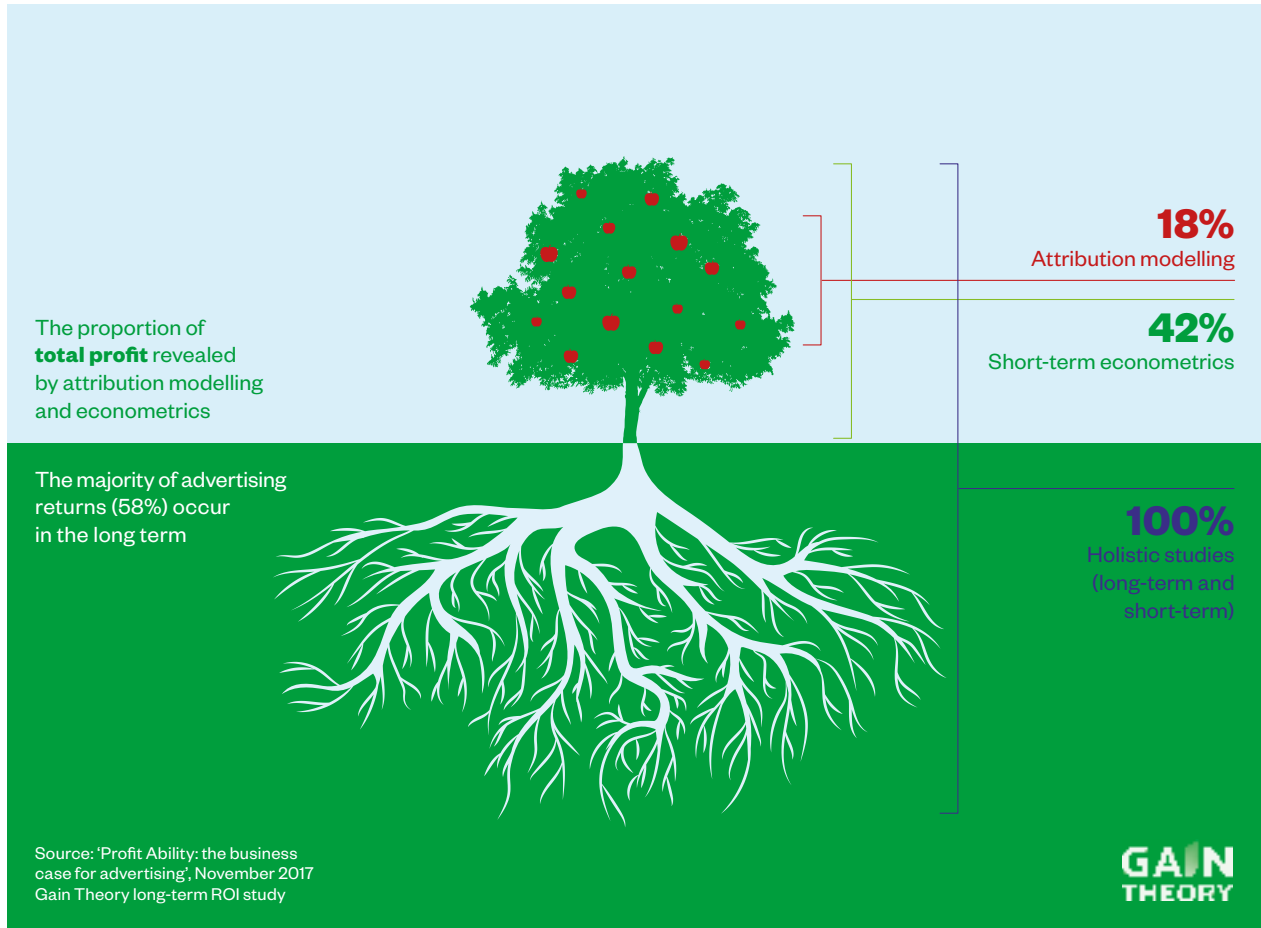
3. It validates that better balance is not only the most effective but the most responsible strategy.

Whilst the work was commissioned by Thinkbox, the fact that it was written by two of the most highly regarded analytics and foresight consultancies and covers 2,000 campaigns pretty much eradicates any of the usual complaints of partisanship.

“The majority of a company's value will come from profitable sales made in the future.”

KEY FINDING

58% of all media impact comes in the long term.



LORNA HAWTIN TBWA

UK investment in the long-term today

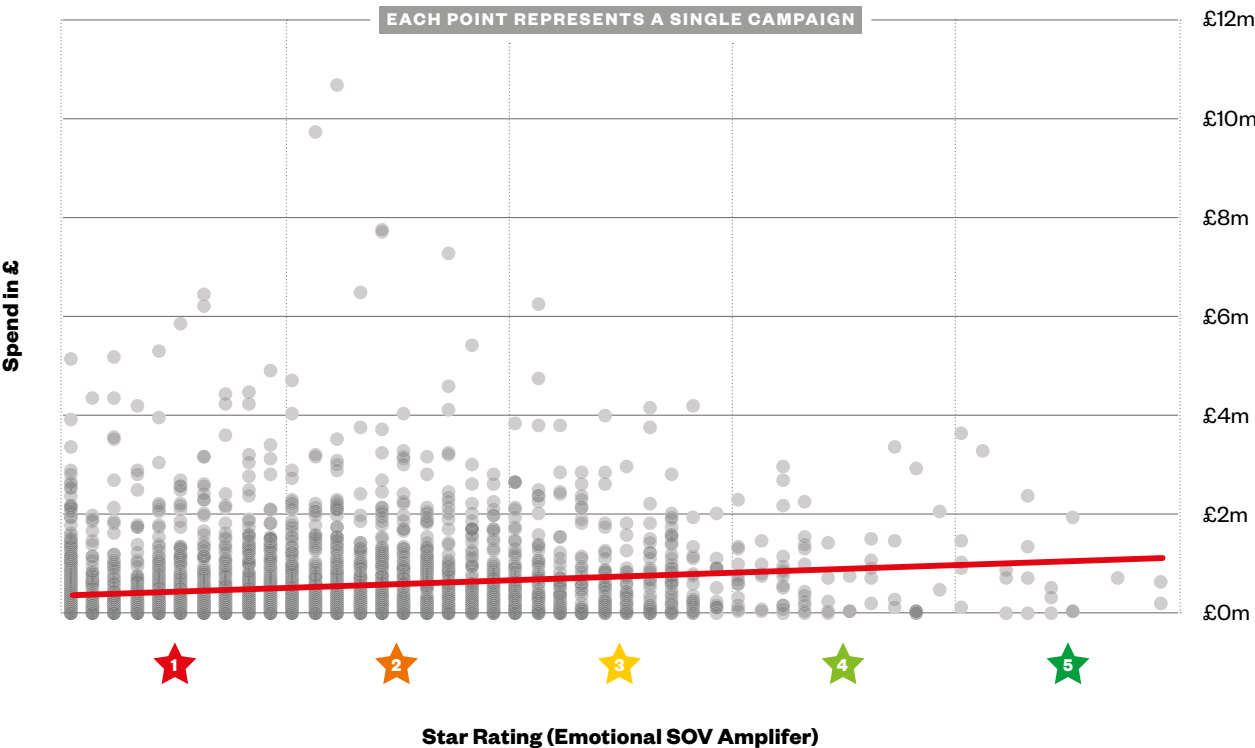
I was drawn towards this chart from System 1's latest research. Using their emotional resonance star ratings, it shows just how much of the UK's TV advertising budgets are currently being invested in what appears to be sub-optimal copy.

So sobering to see all those precious pound coins being ploughed into at best average ideas. What I like though, is that it's a great chart to help create a shared benchmark for success at the beginning of a project or even relationship. Together do we want to do good; or do we want to do great?

“It shows just how much of the UK's TV advertising budgets are currently being invested in what appears to be sub-optimal copy.”

KEY FINDING

Advertisers are not putting enough money behind their best work.





PETER FIELD MARKETING CONSULTANT

Big Tech use traditional advertising media

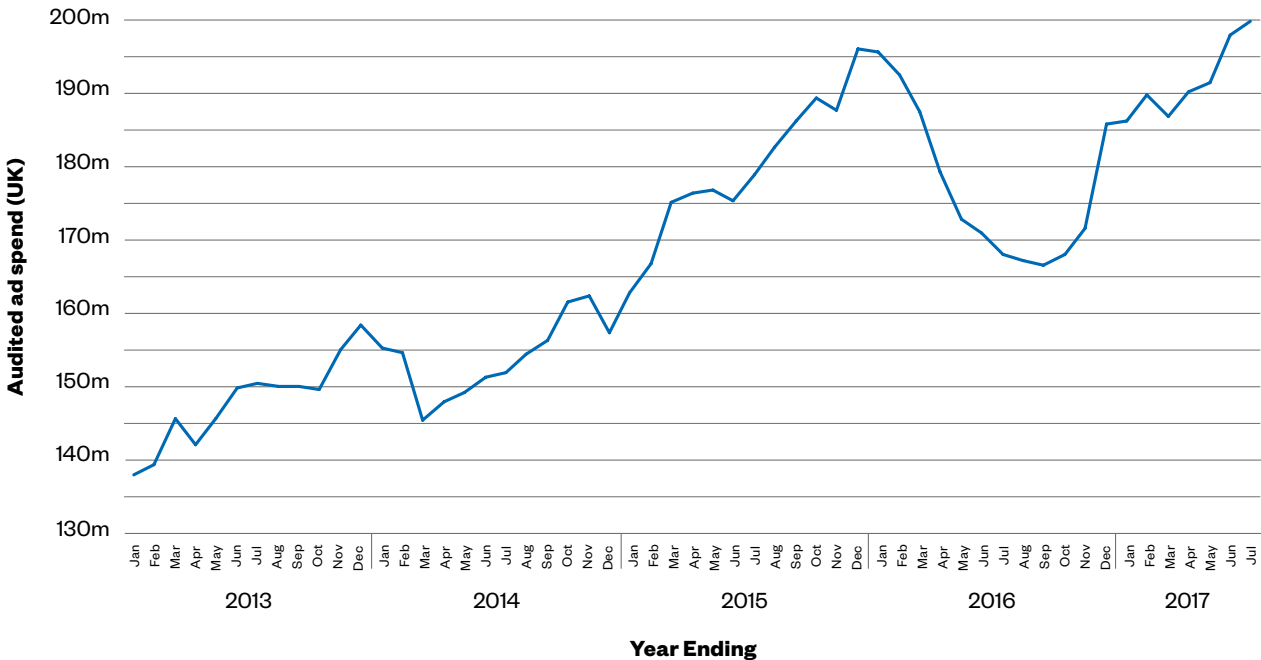
The army of digital consultants and planners relentlessly tell us that we should be putting more (if not all) of our money into newer online channels and that the established advertising media, like TV, radio, OOH and print are no longer effective.

Quite why they do this when the overwhelming body of effectiveness evidence points to the opposite conclusion, is increasingly an enigma. Clearly Big Tech are looking more objectively at what works: despite having access to advanced digital tools and data, these companies choose to put ever more money into traditional advertising media. Perhaps 2019 will be the year that we all wake up and smell the coffee?

“ Clearly Big Tech are looking more objectively at what works. ”

KEY FINDING

Major tech firms spend on traditional brand media.



Source: Nielsen Brands: Amazon, Google, Apple, Facebook, Twitter, AirBnB, Uber, Spotify



PATRICK BARWISE LONDON BUSINESS SCHOOL

Proportion of advertising-generated profit by medium

What most companies want when allocating resources to advertising is to maximise its contribution to the long-term value of the business.

The challenges are to sustain investment in long-term brand-building, looking beyond short-term sales, and to optimise the media mix. This chart shows that, for the mid-sized and large B2C advertisers covered by Ebiquity and Gain Theory's client-funded econometric studies, TV generates the highest average three-year return and online display the lowest. These are average figures and the results will vary greatly between different brands and campaigns because of variations in the context, the objectives, and the quality of creative

strategy and execution. There may also be synergies between media. But, overall, because of TV's high average three-year return, it still captures over 50% of these brands' media budgets. It's that combination of high profitability and high investment that explains its remarkable 71% share of the total profit contribution in the chart.

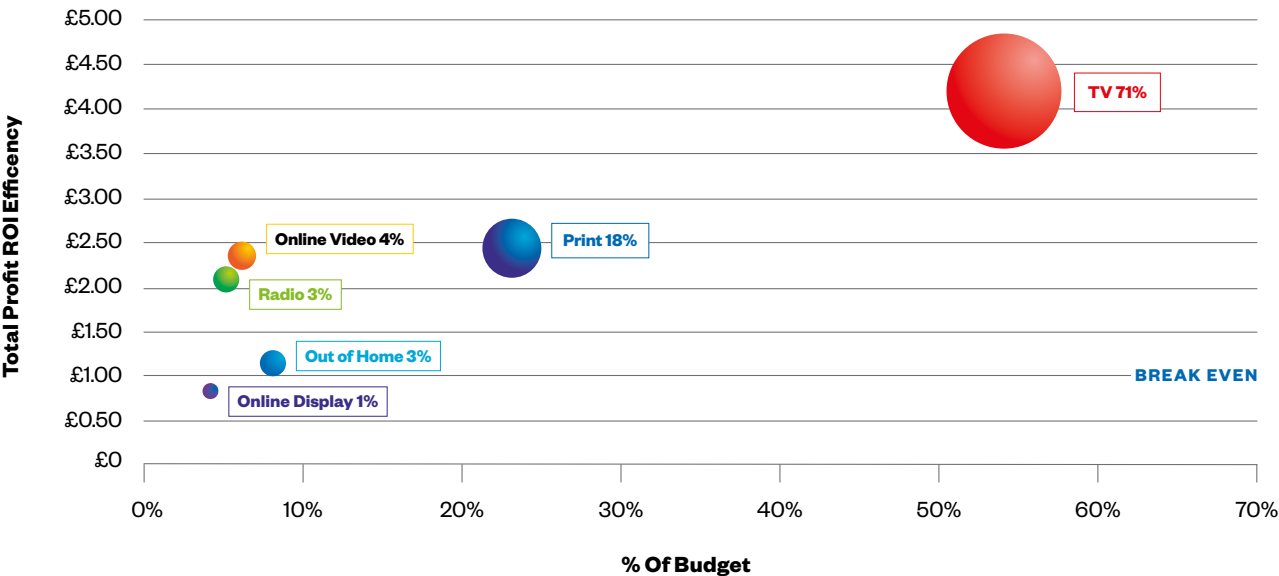
“ This chart shows that TV generates the highest average three-year return. ”

KEY FINDING

TV delivers 71% of total profit generated by advertising.

Bubble size represents % of total profit

Total profit = all return (short and long-term) generated over 3 years



Source: 'Profit Ability: the business case for advertising', Nov 2017 Ebiquity ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954





How can we help?

As the curtain falls...

Well, how in the name of Binet & Field do you follow all that? Not easily is the answer. This last section is like that thankless person at the end of a conference raising their voice above the rustle of bags being packed and asking you to fill in the feedback form so they can make the next event “even better”. But don’t tear your lanyard off just yet. There’s goodness to be found here too...



This is Us, More4

Goodness such as...?

Such as the things we haven’t told you yet.

For example?

Your chance to email: feedbackform@thinkbox.tv to let us know how to make the next ‘A Year in TV’ even better.

Is that a real email address?

Try it, you may be surprised [first 10 emails win something].

Anything else?

Yes, our newsletter.

Boom

Quite. It’s called “Thinkbox in your inbox”, and not only does that rhyme, it’s crammed with reason and things we think you’ll find interesting or useful, as well as unique and fantastic opportunities you won’t find anywhere else. It’s way better than the dozens of other newsletters you get, and mercifully infrequent – no more than twice a month or so.

Where do I sign?

It’s easy, just register on our website, www.thinkbox.tv/register and tick yes to newsletters. And while you’re there, you may as well visit our case studies section showcasing the many and varied way that brands are using TV. And, once you’ve enjoyed those, there’s a library of the best TV and advertising research. And, after that, as you crave more, there’s all the latest data about commercial TV. And then you’ll be hooked, mainlining TV inspiration, and no doubt immerse yourself in our galleries of great TV creativity.

I love lanyards. Any advice?

Yes! Come to our events; our lanyards are soft and comforting. They also make excellent gifts. We do about half-a-dozen events a year, they’re free and full of fodder for your mind. Details will be in the newsletter you just signed up to.

What if I like what I see at your events and want more?

Then we will come to you and offer you as much as you’d like. We currently average over one presentation every working day of the year, but we want to do more so get in touch with research@thinkbox.tv to arrange for us to come over with the latest from the world of TV.

I feel like I didn’t make the most of my education

We’re fans of lifelong learning here at Thinkbox, which is why we hold TV training workshops. They are free to anyone working at a UK advertiser, a media or advertising agency, or for one of Thinkbox’s associates, shareholders, or their partner companies. Details on upcoming workshops are on our website – or get in touch with training@thinkbox.tv if you want something bespoke.

What if, despite the newsletter, the events, the website, the presentation, and the training, I still have questions?

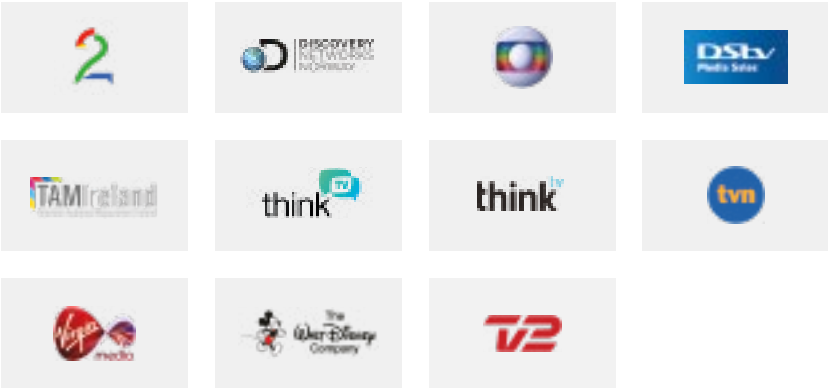
Not a problem. For any questions either email planning@thinkbox.tv or call us on 020 7630 2320.

With thanks to:

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