A year in TV

Thinkbox Annual Review 2020–21

ENTER

thinkbox

2020 at a glance

3hrs 22mins
The average person watched 3 hours, 22 minutes of broadcaster TV a day

News viewing was up 33%, shared viewing up 8%, and weekday daytime viewing up 16%

Costs of TV advertising falls by circa 50% in April

16-34s
TV continues to be the largest single portion of video viewing for 16-34s

THANK YOU NHS

BLACK LIVES MATTER

> I think (TV is) embracing the flexibility that advertisers have been asking for ... to be able to make decisions on where we invest, four weeks before broadcast rather than eight just feels like the right thing to do and I think hopefully advertisers will repay that change with more investment.

Chris Ladd, Nationwide

◉ Boris Johnson, daily press briefing, Hannah McKay/PA Wire/PA Images
◉ NHS rainbow banner photo by Red Dot / Unsplash
◉ Black Lives Matter photo by James Eades / Unsplash
◉ Dance troupe Diversity's performance on Britain's Got Talent
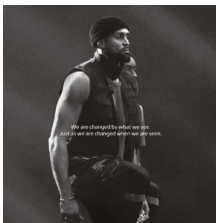
91%
Broadcaster TV advertising accounted for **91% of all video advertising**

BVOD now plays a crucial role in driving cost-effective reach

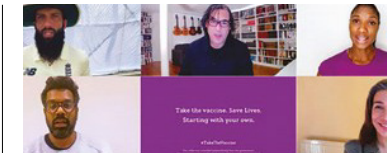**Online businesses remained the dominant advertisers** in 2020

3,956
3,956 people signed up for our first TV Masters online training course in autumn 2020

> I did a module one evening and used a piece of knowledge I gained from it in a presentation to a client the next afternoon!

TV continued to be the commercial medium people spend most time with

Total video time grew by 40 minutes per person per day

1,243
New to TV advertisers running across linear TV and AdSmart

68%
68% of adults watch 50+ linear TV ads a week

Mediahub for NHS England

Winner
Mediahub crowned champion of champions, winning the Thinkbox TV Planning Awards Grand Prix for their planning on the NHS England campaign.

◉ Emmerdale, ITV
◉ #TakeTheVaccine broadcast
◉ 'No Naughty List', Tesco
◉ Saturday Night Live, Sky Comedy

Also available to download: the full printed version of 'A Year in TV 2020-21

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What did the industry watch?

Take a look at the varied viewing of industry peers from 2020.

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Video reach planning

Not all forms of video are equal – so not all reach is equal.

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Advanced TV case studies

Four different brands showcase how they are taking advantage of today's TV solutions.

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Young planners' learnings

What was it like to plan media in 2020? These young planners give us their take.

Welcome

From Lindsey Clay

It might seem odd to talk of successes from the last year, but we shouldn't ignore silver linings just because of the whopping great clouds. TV proved its worth in the pandemic. Socially, as a source of vital entertainment, escapism, and trusted news; and commercially, as broadcasters were nimble, increasingly flexible, and advertisers took advantage of the incredible price TV was offering – many of whom had never tried TV before (see p.24).

But it wasn't only price. TV advertising continued to digitally transform and roll out targeted data and tech-led opportunities to augment its established powers (see p.28). Advertisers are welcoming this; TV now offers the best of both worlds.

In particular we saw the acceleration of ecommerce reflected in TV advertising. TV is the shop window for ecommerce brands and we're seeing more and more of them displaying their wares (see p.23).

And though ecommerce's attraction to TV is about driving sales, it is equally about brand. TV makes the virtual physical, and adds credibility and trust (see our signalling research on p.36).

Brand is back, and with it an increasing culture of effectiveness. Advertisers are returning to the higher ground – witness Airbnb's recent decision to shift from performance to brand.

This is good news for TV, another silver lining. And while advertisers are in a re-appraising mode it was the perfect time to have launched TV Masters – the world's first comprehensive TV advertising training course. It has been incredibly well received and is already a vital resource for the industry (see p.30).

I hope you find this publication useful and insightful. And if, after reading, you are left with questions or a thirst for even more information, please do get in touch (or sign up to TV Masters and become an expert that way).

Lindsey Clay CEO, Thinkbox

2020 hindsight

Rob & Romesh Vs, Sky One

Adapting to adversity

If Covid has taught us anything, it's that adaptability is not just needed to thrive, but to survive. This has certainly been true in business where the mettle of marketers has been thoroughly tested since the start of the pandemic.

The arrival of Covid has brought about change at breakneck speed for brands. Priorities shifted, consumers began to behave – and feel – differently and marketing strategies had to turn on a sixpence to accommodate the state of flux brought about by various lockdowns.

To delve into this further, Thinkbox commissioned agency Work Research to explore what the Covid crisis really meant for marketers. They conducted interviews with 12 senior clients at the end of 2020, who each reflected on the pandemic's impact on their businesses. They also revealed their perspective on what changes they foresaw in their approach to marketing throughout 2021 and beyond.

Watch our series of short films in which top advertisers reflect on the pandemic's impact on their businesses, and offer their perspectives on marketing in 2021

Tuning in to the mood of the nation

BEN NEWBURY YORKSHIRE TEA

"We had to always take that healthy sense check of 'what's really going on?' and [we knew] we were going to get this right or wrong before we pressed go. It's paused a lot of stuff that we made. And we held it, and we held it, until we felt the time was right to go live."

Brand and response

SIMON WALLIS DOMINO'S

"We used three guiding principles as some kind of compass. Firstly, to keep serving our customers and looking after our people. Second to build brand preference and look after our communities, and to ensure that the brand comes out of the crisis stronger than it went into it. In other words, take actions today that our team members and customers will remember for a lifetime."

Reach and growth

AMY BUTTERWORTH TESCO

"Targeting really changed from a sub-segment of society, to everyone who does a shop – no matter where to be honest – everyone that needs to buy food, so basically the whole population."

Fast-forwarding innovation

GAYLE NOAH L'ORÉAL

"We'd already started on the ecommerce journey many years ago, but I would say that Covid really accelerated our plans by about three years. So within a matter of weeks we had really activated a lot more platforms and channels and retailers to start driving ecommerce."

Signalling

CHRIS LADD NATIONWIDE

"I can't believe there won't be some long-term benefit from us being present in the market in the medium that has always given off a sense of trust and stature."

The importance of partnerships

JULIA SPARROW MONDELEZ

"The brand teams in our business have really seen the value of that collaborative spirit and I do think that everyone has rallied round to come together."

TV making a difference in 2020

TV can entertain, inform and inspire. It can help us feel connected to others through the shared experience of viewing. And it also has the power to do good through its rich content, powerful advertising and the work of the UK broadcasters. Here is a taster of some of the positive actions we saw in 2020.

itv

Britain Get Talking: An ITV Mental Wellness initiative to help Britain stay connected. During 2020 lockdown 6.4 million people reached out to connect with friends and family, making 15 million calls and sending 27 million text messages as a direct result of the campaign.

Stay at home & Stay in touch: Launched in January 2021 in collaboration with Mind as an extension of Britain Get Talking, the campaign reached 42 million viewers in the first two weeks.

Clap from our Carers: A short film which showed NHS workers encouraging people to stay connected as well as staying at home.

Comedy Against Living Miserably, Dave

UKTV

Dave & CALM: The ongoing partnership between Dave and the Campaign Against Living Miserably (CALM) continued in 2020 with a three-part series – 'Comedy Against Living Miserably' – and an expansion into merchandise, which generated nearly £30k for CALM's life-saving services.

All Voices: Film London's Equal Access Network and UKTV's collaborative initiative 'All Voices' offered 12 paid, full-time roles on 17 UKTV Original productions to those from underrepresented groups, including new entrants, mid-level professionals and returners to the industry.

sky

Supporting small businesses during the pandemic: In May, Sky launched SME100, a £1m fund to provide 100 small businesses with TV advertising campaigns via AdSmart. After high demand, the fund was increased to £2.5m and was able to support 250 individual businesses.

Accelerating towards a sustainable future: In 2020, Sky announced Sky Zero with an ambition to be net zero carbon by 2030. With over 150 plug-in hybrid electric vans introduced to their fleet, Sky has also started building Sky Studios Elstree, which aims to be the world's most environmentally friendly TV and film studios.

Helping tackle racial inequality: Sky committed to investing £30m to fight racial inequality across their markets. They also appointed a Diversity Advisory Group and Diversity Action Council, and announced new targets for 20% of employees at Sky in the UK & Ireland to be from Black, Asian or Minority Ethnic backgrounds by 2025, with at least a quarter of these to be Black.

Home is Christmas

sky 0
#GoZero

4

ClapForCarers: In the early days of lockdown, Channel 4 worked with advertisers to create an entire ad break dedicated to showing solidarity and support for the NHS. Forty-two per cent of viewers said they would talk about it with others, and 56% were inspired to look into ways they could help.

#StandAgainstRacism: In response to the racist online reaction to the Sainsbury's Christmas ad, Channel 4 worked with the leading supermarkets to unite in solidarity. The brands and their ads stood side by side at the most commercially critical time of the year, coming together in two ad breaks for the first time to #StandAgainstRacism.

Diversity in Advertising Award: Channel 4's annual £1m airtime prize encourages the UK advertising community to be more inclusive in their campaigns through authentic representation of a specific diverse community. 2019's theme was LGBT+ representation and was won by Starbucks for their groundbreaking #whatsyourname advert which aired in 2020. Previous iterations of the contest have challenged brands to portray disability, hidden disability and gender in their ads.
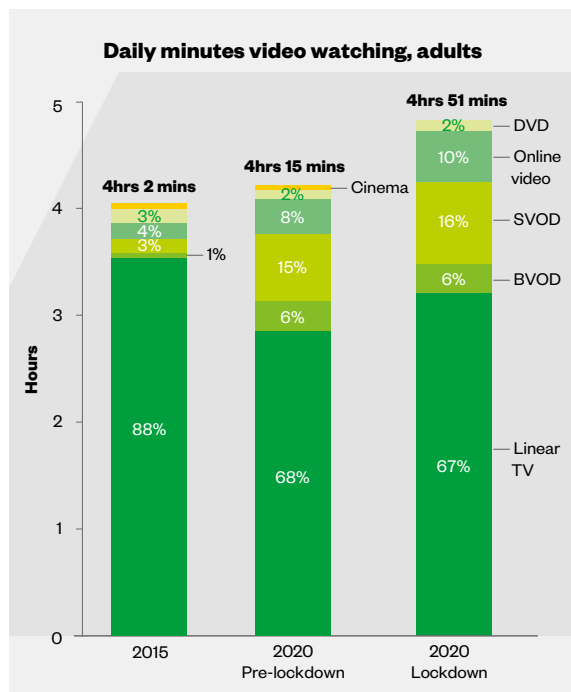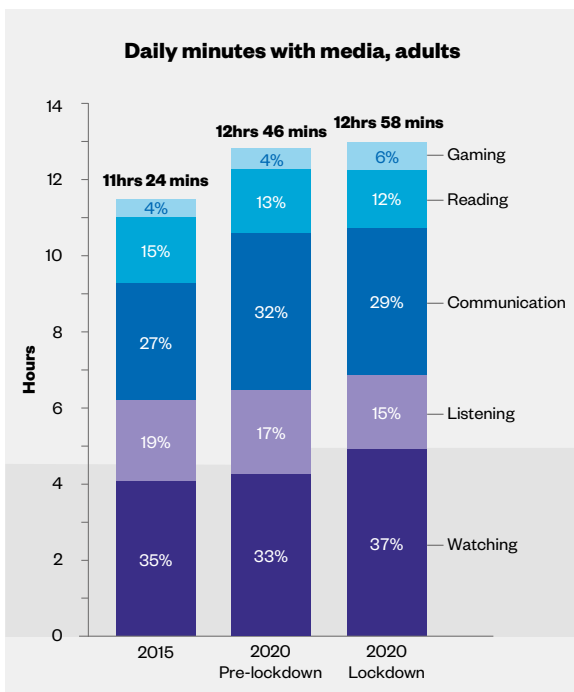
Viewing trends

It's A Sin, Channel 4

The media landscape

You're here for the TV stats and insight of course. Who wouldn't be?
But, before we zero in on TV, some context…

Media minutes have grown, linear TV still largest

Daily minutes with media, adults

Daily minutes video watching, adults

Some key numbers:
– Lockdown increased media time, particularly 'watching', which was up 15%
– TV accounted for the bulk of commercial media time, some 38%
– Time spent out of home decreased in 2020 by 68%

Total media time has been increasing
Over the last five years our media time has been on the up. This is because of a small increase in the time we've been 'watching' and a larger increase in the time we've been 'communicating' – eg messaging, social media and emailing.

Lockdown boosted 'watching'
2020's lockdown pushed average daily media time to a whisker below 13 hours (although some of this time is duplicated across media).

Most of this lockdown growth went to 'watching' as the nation turned to their TVs and devices for much needed entertainment, escapism and information. In total, there was a 15% increase in 'watching' – an extra 37 minutes per person per day.

Gaming, too, increased in lockdown – up 32% – while reading declined by 8%, perhaps due to the drop in commuting, and listening remained unchanged.

Time spent communicating dropped during lockdown
This was driven by 31% less time spent 'emailing' – the impact of furlough and rise of video calls the likely culprits. Social media use and texting/messaging weren't really affected by lockdown.

We spent more time at home in lockdown
Hope you were sitting down when you read that shocking fact. Time spent out of home is not covered in the charts as it is purely a measure of time spent 'outside' rather than time spent with a chosen medium. But it is interesting to note the extent to which it was affected by lockdown. It dropped by 68%, according to IPA Touchpoints data, with the average adult spending just under an hour a day outside in lockdown compared with nearly three hours a day before. This obviously had a knock-on effect on indoor media consumption like TV.

TV was the bulk of commercial media time
With 38%, TV continued to be the commercial medium people spend most time with, with social media second with 24%. Over the page we'll take a closer look at exactly what happened in TV in 2020.

Commercial media day: adults
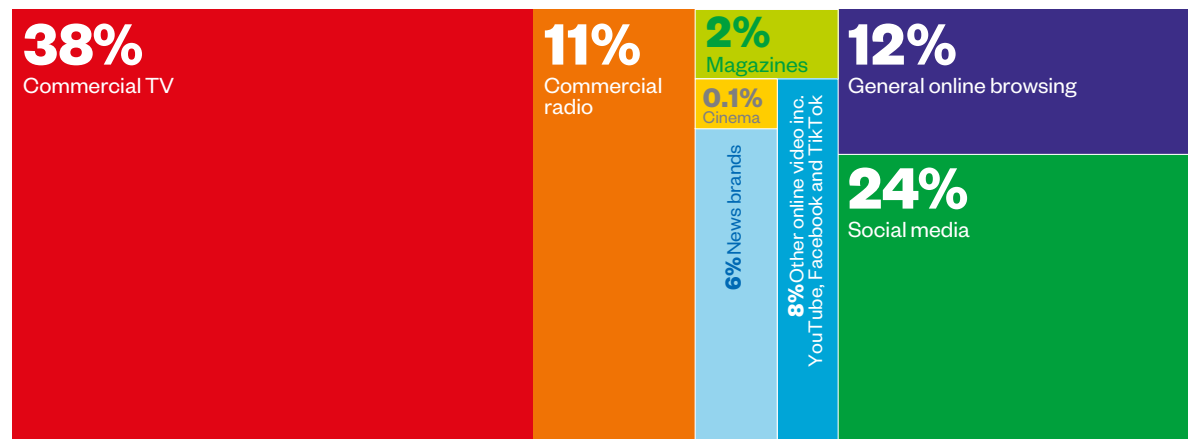
- **38%** Commercial TV
- **11%** Commercial radio
- **2%** Magazines
- **0.1%** Cinema
- **6%** News brands
- **8%** Other online video inc. YouTube, Facebook and TikTok
- **12%** General online browsing
- **24%** Social media

How 2020 changed the video world

Before 2020, there was a fairly consistent story about TV and video viewing. But that was before 2020. As with pretty much every sector, last year made a mockery of predicted TV and video trends. Throw in Disney+ (good time to launch) and TikTok (good time to exist) and this year's analysis of the video world is anything but predictable.

Summary:

– All forms of TV grew in 2020 – yes, live TV too

– Broadcaster TV continues to be the largest single portion of video viewing (incl. for 16-34s)

– From nothing, TikTok took 3.5% of video viewing time

– The TV set is the home of high-quality content; broadcaster TV and SVOD account for 94% of all TV set viewing

– SVOD subscriptions continue to rise with Netflix accounting for the majority of SVOD viewing time (74%)

Pre-2020...

In TV, overall viewing was pretty stable, but there was a gradual decline in live TV viewing because we had more choice and could spread our viewing across live and on demand – both from the broadcasters and subscription VOD (SVOD) players like Netflix and Amazon Prime Video. In online video, there was jockeying, but YouTube was clearly the big beast and largely unchallenged.

All forms of TV saw growth in 2020

It's no surprise our need for entertainment increased in 2020.

This thirst for escapism and distraction helped every form of broadcaster TV (live, on demand and playback) collectively grow by 5% year-on-year. That's an extra 10 minutes viewing per person per day. The average person watched 3 hours, 22 minutes of broadcaster TV a day.

Within this there were obvious lockdown-related shifts in consumption, with news viewing up 33%, shared viewing up 8% and weekday daytime up 16%. It was a similar story in SVOD's corner of the TV world, where the average time spent viewing grew by 12 minutes per person per day – a 50% growth year-on-year (obviously coming from a much smaller base than broadcaster TV). The average person watched 36 minutes of SVOD a day.

We've collated all the charts from this publication into one easy, nickable deck. Just click here to download.

All forms of TV have seen growth in 2020

Legend: ■ Live TV ■ TV Playback ■ Broadcaster VOD ■ Subscription VOD
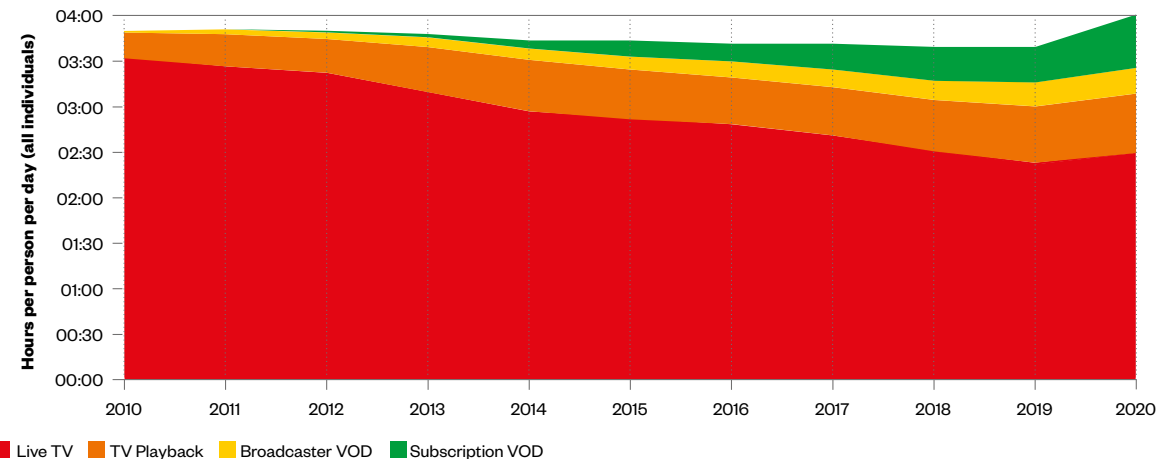
Source: 2010-2020, BARB/Broadcaster stream data/IPA Touchpoints 2020, Individuals

Young people's viewing is increasingly spread across platforms

Legend: ■ Live TV ■ TV Playback ■ Broadcaster VOD ■ Subscription VOD
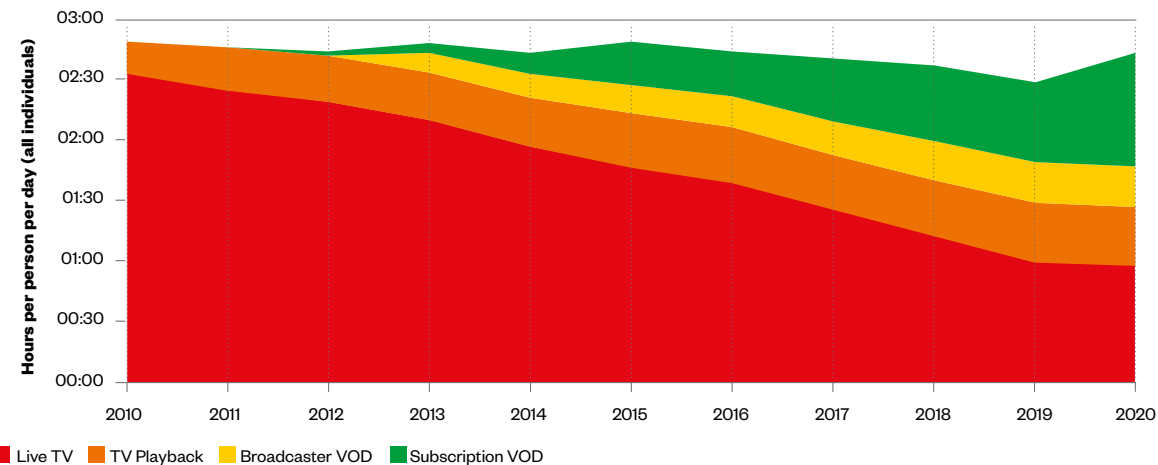
Source: 2010-2020, BARB/Broadcaster stream data/IPA Touchpoints 2020, 16-34

Young people's broadcaster TV viewing stabilised

Younger viewers also looked to TV for escape and to provide them with entertainment and information. This halted a gradual decline of their broadcaster TV viewing in recent years.

With smash hit Love Island missing last summer, their BVOD viewing – where so many Island shenanigans are usually enjoyed – was largely unchanged, having grown consistently over the past five years. We'd expect a return to growth in 2021.

And their SVOD viewing increased by 42% (17 minutes a day, or about a quarter of an episode of The Queen's Gambit) to account for 35% of 16-34s' TV viewing in 2020.

Total video time grew by 40 minutes a day

When we expand the picture to look at all forms of video, we see that total video time grew by a significant amount in 2020: 40 mins per person per day. Most forms of video (even DVDs) saw a year-on-year increase.

The obvious exception here is cinema, which saw a 75% drop in viewing time through no fault of its own. We'd expect this to be temporary and that cinema will bounce back once normality resumes.
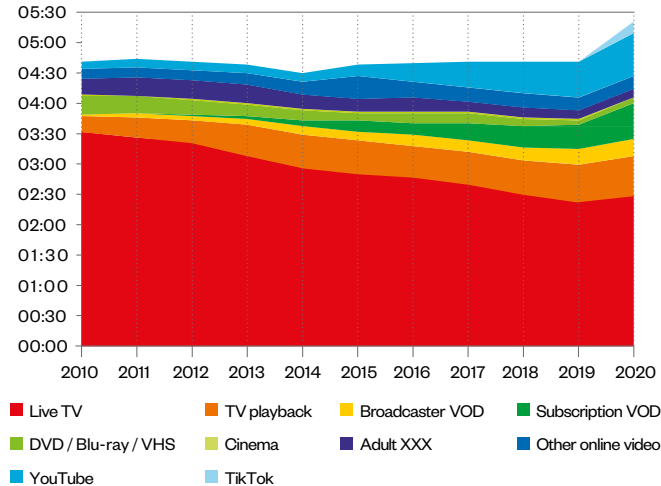
New entrant TikTok had a pretty significant impact for its first full year and accounted for 3.5% of all video time in 2020. YouTube increased its share from 12.5% in 2019 to 13%. And Facebook fell slightly from 1.2% to 0.9%.

One trend that wasn't changed by 2020 is the difference between 16-34s' video consumption and the UK average. TV (broadcaster + SVOD) accounts for 75% of the average video day compared with 56% for 16-34s. Within this, broadcaster TV continues to be the largest single portion of video viewing, both for 16-34s and all individuals.

YouTube dominates the online video space accounting for over half of 16-34s' time spent with online video. TikTok, however, made significant inroads, claiming a 9% share of all 16-34s' video time and 22% of their time spent with online video.

Total video time grew by 40 mins a day in 2020

Hours per person per day (all individuals)

- Live TV
- TV playback
- Broadcaster VOD
- Subscription VOD
- DVD / Blu-ray / VHS
- Cinema
- Adult XXX
- Other online video
- YouTube
- TikTok

Source: 2010–2020, BARB/Broadcaster stream data/IPA Touchpoints 2020, Pornhub/Rentrak, Individuals

2020 video day
Average video time per day

All Individuals:
5hrs, 16 mins

16-34s:
4hrs, 54 mins

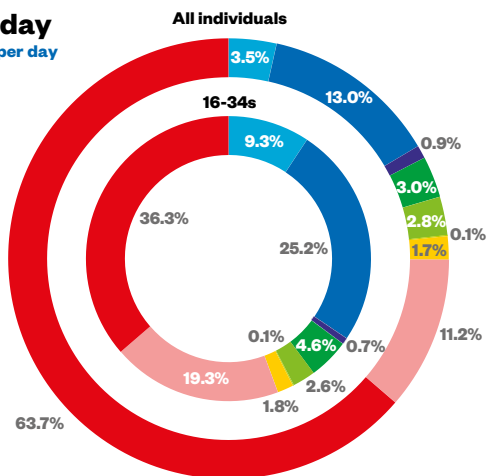- Broadcaster TV
- Subscription VOD
- DVD
- Cinema
- Online 'adult' XXX video
- Other video
- Facebook
- YouTube
- TikTok

Source: 2020, BARB/Broadcaster stream data/comScore/IPA Touchpoints 2020/Pornhub/Rentrak

BVOD is vital to younger audiences

Breaking down broadcaster TV into the different ways it can be accessed reveals the increasingly important role of BVOD for younger audiences, now 19% of all broadcaster TV viewing for 16-34s.

It also shows that anyone writing off live TV is misguided and needs to understand why people watch different types of TV and video. Live TV made up over half of 16-34s' broadcaster viewing in 2020.

The TV set is the home of high-quality content

This year we have also cut the data to just look at time spent watching video content on the TV set, as that is increasingly the key battleground for video. An interesting picture emerged.

Walk into a living room and find the furniture not facing the TV and you're walking into a strange land. And the focal point of our living rooms continues to account for the majority of our video consumption: 76% among all individuals and 53% among 16-34s.

And what we watch on it shows that the TV set is the home of high-quality, professionally produced content. Broadcaster and subscription TV dominate, accounting for 94.1% of TV set viewing.

Whilst the TV set is a growth area for YouTube and now accounts for roughly 25% of all its usage, YouTube accounts for less than 5% of total TV set time.

Where is Connected TV on the TV set chart?

Whilst every other TV industry event is focused on the emerging Connected TV (CTV) market, it's important to note that, outside of BVOD and YouTube, there isn't any measurable volume of viewing to any other ad-funded VOD services on the TV set.

In the US, this is no doubt a more significant emerging market, with big players such as Hulu, Peacock and Roku. But in the UK we're yet to see any meaningful volume of viewing to CTV services on the TV set, beyond that of the broadcasters, SVOD players and YouTube.

Breaking down how we watch broadcaster TV

3 hrs 22 mins — All individuals: 73%, 8%, 19%

1 hrs 47 min — 16-34s: 54%, 19%, 27%

- Live TV
- TV playback
- Broadcaster VOD
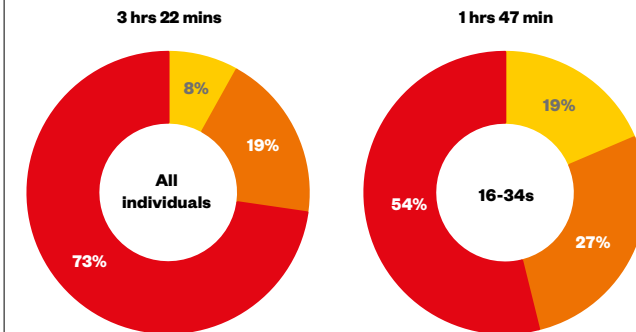
Source: 2020, BARB/Broadcaster stream data

TV set video day 2020
Average video time per day (TV set)

All Individuals:
4hrs, 0 mins
(76% total video day)

16-34s:
2hrs, 42 mins
(53% total video day)

- Broadcaster TV
- Subscription VOD
- DVD
- YouTube
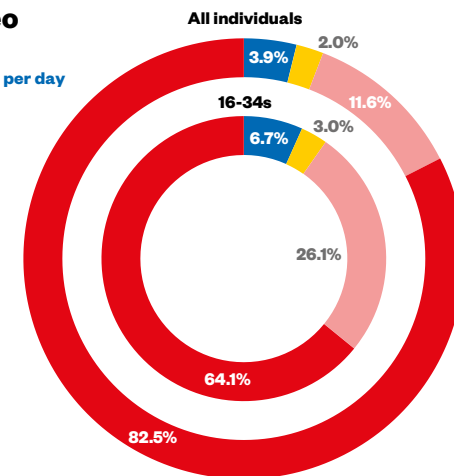
Source: 2020, BARB/Broadcaster stream data/comScore/IPA Touchpoints 2020

Breaking down 'unmatched' viewing

The Broadcasters' Audience Research Board (BARB) defines unmatched viewing as when the TV set is on but the content wasn't broadcast as part of a linear schedule in the last 28 days. This includes gaming and viewing to SVOD services and shows that haven't been broadcast in the previous four weeks.

The growth in time spent viewing 'unmatched' content, as reported by BARB, is often used to demonstrate the changing nature of TV set viewing. And, by applying IPA Touchpoints data, we can get a pretty good idea of what this unmatched viewing consists of.

Forty-two per cent is viewing to SVOD, 16% is gaming, 13% is viewing to broadcaster content outside of the 28-day window (VOD or playback), 11% is YouTube, and 7% is watching DVDs. There's also, according to BARB, about 10% that is unknown unmatched viewing. This could be the TV set being turned on but no audio playing, paused content, or long tail TV set app usage.

Jamie: Keep Cooking and Carry On, Channel 4

Breaking down 'unmatched' TV set viewing time

TV set viewing time per day (All individuals)

- Unmatched Viewing
- Broadcaster TV

3hrs 19 mins — 1hr 7min

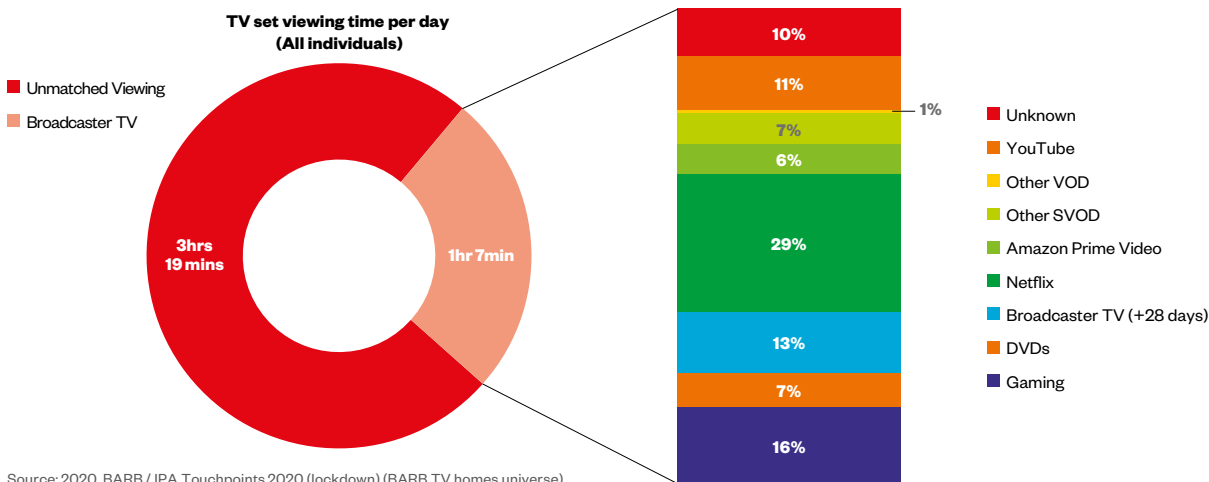- 10% Unknown
- 11% YouTube
- 7% Other VOD
- 1% —
- 6% Other SVOD
- 29% Amazon Prime Video — Netflix
- 13% Broadcaster TV (+28 days)
- 7% DVDs
- 16% Gaming

Source: 2020, BARB / IPA Touchpoints 2020 (lockdown) (BARB TV homes universe)

SVOD subscriptions continue to rise

As we've seen, like broadcaster TV, SVOD benefited from lockdown, with viewing time increasing by 50% year-on-year (up 12 mins per person per day to 36 mins in total).

The number of people with access to at least one SVOD service now stands at 69% – and 83% of 16-34s. There has also been a notable uptick in the number of over 65s with access to an SVOD service in 2020, up from 20% in Q3 2019 to 31% in Q3 2020.

Netflix continues to dominate SVOD

As the streaming wars continue to hot up, we now have several major players competing for eyeballs. As it currently stands, Netflix takes the lion's share of viewing time.

The BARB establishment survey estimates that 61% of Individuals have access to Netflix, an increase of 11 percentage points year-on-year and putting them ahead of Amazon Prime Video who stand at 40% (up from 27% in 2019).

The impact of Disney+

Disney+, which launched at the end of March 2020 as the UK went into lockdown, was available to 16% of people in the UK as at Q3 2020, which is pretty impressive from a standing start.

IPA Touchpoints data doesn't provide the detail needed to break Disney+ down, but with 'other' SVOD viewing growing from 2% of all SVOD time pre-lockdown to 12% post-lockdown, we'd estimate that Disney+ likely accounts for the majority of that increase.

Over two thirds of people now have access to an SVOD service

% SVOD penetration — 90.0, 80.0, 70.0, 60.0, 50.0, 40.0, 30.0, 20.0, 10.0, 0.0

Q3 2014, Q3 2015, Q3 2016, Q3 2017, Q3 2018, Q3 2019, Q3 2020

- All individuals
- 35–64
- 16–34s
- 65+
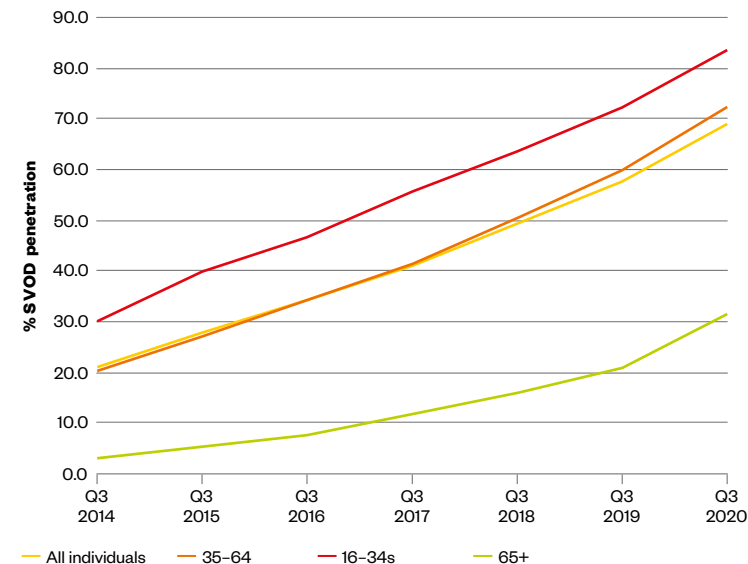
Source: BARB Establishment survey

How the subscription VOD market breaks down

Individuals 36 mins — 73%, 12%, 15%

16-34s 57 mins — 73%, 14%, 13%

- Netflix
- Amazon Prime Video
- Other
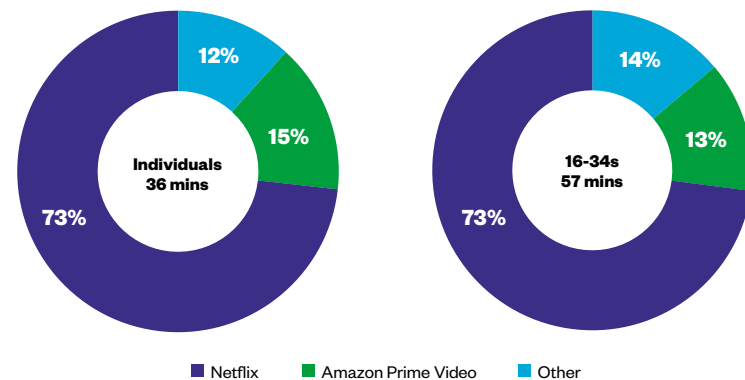
Source: IPA Touchpoints 2020

What did the industry watch in 2020?

MIHIR HARIA- SHAH
HEAD OF BROADCAST, ANYTHING IS POSSIBLE

What was your TV moment of the year?
Diversity's performance on Britain's Got Talent.

Describe your 2020 viewing in 3 words?
"(Are) you still watching?"

Best box set catch up?
The Last Dance on Netflix.

What was your lockdown guilty pleasure?
First Dates (old and new).

Which two TV characters would you invite over for dinner?
Romesh Ranganathan and Jamie Redknapp – their banter on A League Of Their Own is unmatched.

What TV can't you wait for in 2021?
Hopefully another series of SAS: Who Dares Wins on Channel 4.

↗ Britain's Got Talent, ITV
↗ A League of Their Own, Sky One
↗ The Last Dance, Netflix
↗ First Dates, Channel 4

NICK ASHLEY
HEAD OF MEDIA AND CAMPAIGN PLANNING, TESCO

What was your TV moment of the year?
Watching Leeds United return to the Premier League on Sky Sports, and specifically the players encouraging maverick manager Marcelo Bielsa to lift the trophy.

Describe your 2020 viewing in 3 words?
Frequent, varied, comforting.

Best box set catch up?
Succession. A series about a media empire – what more could I wish for?

What was your lockdown guilty pleasure?
I'm A Celebrity...Get Me Out Of Here! I watched every single minute, and not just because of the contextual partnership that we ran with the show.

Which two TV characters would you invite over for dinner?
Ant and Dec. Hysterical, and just what we needed at several times throughout lockdown.

What TV can't you wait for in 2021?
Beyond what hopefully will be an excellent summer of sport, My Name is Lizzie (Channel 4), Landscapers (Sky Atlantic) and (hopefully) Murder on Middle Beach Season 2 (HBO/Sky Crime), an amazing cult documentary created by a son looking to solve his own mother's murder.

MICHELLE SARPONG
TRADING DIRECTOR, THE7STARS

What was your TV moment of the year?
Arsenal winning the FA Cup Final.

Describe your 2020 viewing in 3 words?
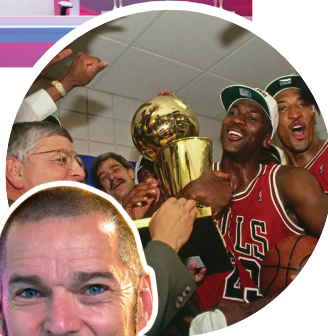Frequent, nostalgic & fluid.

Best box set catch up?
I May Destroy You.

What was your lockdown guilty pleasure?
The Masked Singer US.

Which two TV characters would you invite over for dinner?
Simon Basset (Duke of Hastings) from Bridgerton and James St Patrick (Ghost) from Power.

What TV can't you wait for in 2021?
The Euros and Olympics.

↑ The Masked Singer US, ITV
↗ Bridgerton, Netflix
↙ Vera, ITV
↘ It's A Sin, Channel 4

VICKI MAGUIRE
CHIEF CREATIVE OFFICER, HAVAS LONDON

What was your TV moment of the year?
For me it was ITV and Uncommon stopping prime-time viewing and encouraging us to talk to each other. God I wish I'd done that!

Describe your 2020 viewing in 3 words?
Eclectic. Retro. Inspiring.

Best box set catch up?
A real oldie. I have done EVERY episode of '80s iconic cop show Hill Street Blues. It was groundbreaking back then and has stood the test of time.

What was your lockdown guilty pleasure?
Weirdly I took solace in shows I'd watched time and time again, it was as if I need to know the ending. When ITV started to run old Corrie I was in my element.

Which two TV characters would you invite over for dinner?
Vera and Marge Simpson. Those girls know how to party.

What TV can't you wait for in 2021?
It's A Sin on Channel 4. I partied in the '80s. This series will stay with you long after you've watched it.

For more great 2020 TV, read the '20 from 2020' here for shows you may have missed

JACK SWAYNE
EMEA CEO, M/SIX

What was your TV moment of the year?
It was much longer than a moment. Waiting a week for each new The Undoing episode felt very novel and not being able to binge the whole thing.

Describe your 2020 viewing in 3 words?
Lockdown life-saver.

Best box set catch up?
Insecure on Sky Comedy. Only discovered this last year, and massively enjoyed all four seasons.

What was your lockdown guilty pleasure?
Just a little late to the party, but a very good friend introduced me to Below Deck. I hate/love him for it.

Which two TV characters would you invite over for dinner?
David Brent and Michael Scott from both versions of The Office would be one of the more entertaining dinners.

What TV can't you wait for in 2021?
More live sports. The Euros, Wimbledon, Olympics. Fingers crossed they all happen. Fingers crossed we can watch some of them in a pub.

↑ The Undoing, Sky Atlantic
→ Below Deck, E4
→ Insecure, Sky Comedy
↓ Paralympic Games, Channel 4
↗ 2020 UEFA European Football Championship, ITV

RICH WATERWORTH
GENERAL MANAGER, UK & EUROPE, TIKTOK

What was your TV moment of the year?
The way ITV had to totally rethink I'm A Celebrity... Get Me Out of Here! was just incredible, moving the whole production to Wales and working tirelessly to make sure it was safe for all those involved. And it was just as entertaining as it always is, essential viewing.

Describe your 2020 viewing in 3 words?
Disrupted, varied, essential.

Best box set catch up?
I've been inspired to go back to The Office by one of my favourite creators on TikTok called Cole Anderson-James (@coleandersonj) who produces incredible lip syncs of scenes from the show.

What was your lockdown guilty pleasure?
Dipping back into comedy classics from Cheers to The Simpsons – the TV equivalent of a warm bath – was what I needed in lockdown.

Which two TV characters would you invite over for dinner?
They're not characters, but I'm a huge fan of Ant and Dec who always look like they're enjoying what they do on TV.

What TV can't you wait for in 2021?
Getting back hopefully to live audiences at entertainment and sport – we've realised how much colour and excitement these events bring to our lives and how they really add to the TV viewing experience.

JOANNA JUBER
HEAD OF BRAND, MACMILLAN CANCER SUPPORT

What was your TV moment of the year?
The first episode of I Hate Suzie. How life can change in a heartbeat depicted in glorious chaos and a Cruella de Vil coat.

Describe your 2020 viewing in 3 words?
Lots of it.

Best box set catch up?
Tough to pick just one. Predictably, I have to say The Wire which I re-watched in full. It never tires.

What was your lockdown guilty pleasure?
Watching old Disney movies with my kids and eating Rice Krispie cakes.

Which two TV characters would you invite over for dinner?
Roman Roy from Succession and Marsha from Spaced. It would be like Come Dine with Me meets Caligula.

What TV can't you wait for in 2021?
Toast of London, or apparently this time, Tinseltown. We all need a bit of Matt Berry in our lives right now.

↑ I'm A Celebrity... Get Me Out Of Here!, ITV
→ The Simpsons, Sky One
→ I Hate Suzie, Sky Atlantic
↓ Succession, Sky Atlantic

How big are Netflix shows?

In our last 'A Year in TV', we featured a unique analysis from tech firm Digital-i. It compared, for the first time, topline views of broadcaster TV shows with shows available on Netflix. The sizes of Netflix's audiences are shrouded in mystery, so shedding light on them proved very interesting.

Netflix at a glance

— 60% of Netflix's UK viewing in 2020 (films and TV shows) was licensed programming, 40% original or exclusive.

— US content makes up the majority of TV show viewing, just over 60%. UK content is just under 20% of Netflix viewing in the UK.

— Of the British content available on Netflix, 64% is licensed from the UK broadcasters, the remaining 36% are originals or exclusive.

— Just four shows make up 10% of all Netflix streams (Friends, The Big Bang Theory, Brooklyn Nine-Nine, Modern Family).

As 2020 was a year of growth for all types of TV, we wanted to look at whether things had changed. Does Netflix still rely heavily on licensed broadcaster content? Is it still mainly US content that people watch? Are Netflix audiences still much smaller than the broadcasters'?

The short answer to all those is, well, yes. The fundamentals haven't changed. But it's still interesting to see what Netflix's biggest shows now are and how they compare. The overall story is that, despite it being a year of mass disruption and change, our desire for professionally produced and often familiar TV is undimmed.

Top 20 most-viewed TV programmes in the UK 2020

Rank	Viewing Source	Programme	HH Views (m)
1	ITV	Coronation Street	1,299
2	ITV	Emmerdale	1,223
3	ITV	The Chase	1,105
4	ITV	Tipping Point	924
5	BBC	Bargain Hunt	872
6	BBC	Pointless	767
7	ITV	This Morning	763
8	BBC	EastEnders	667
9	Netflix	Friends	634
10	Channel 4	The Big Bang Theory	620
11	BBC	Homes Under the Hammer	600
12	Channel 4 / Sky	The Simpsons	596
13	BBC	Escape to the Country	567
14	Channel 4	Four in a Bed	543
15	Netflix	The Big Bang Theory	518
16	BBC	Antiques Road Trip	501
17	ITV	Midsomer Murders	455
18	Channel 4	Come Dine with Me	449
19	ITV	Lorraine	444
20	BBC	Flog It!	422
21	Netflix	Brooklyn Nine-Nine	411
31	Netflix	Modern Family	314
42	Netflix	Schitt's Creek	249
48	Netflix	New Girl	218
65	Netflix	The Crown	186
96	Netflix	Peppa Pig	128
122	Netflix	The Umbrella Academy	105
126	Netflix	The Fall	100

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

Household views

Digital-i collects its Netflix data passively from a sample of 2,000 households. We then compare it with BARB data by looking at household 'views' or 'streams' for individual shows (see table bottom left).

When we compare total household views, we see a similar picture to the previous year: a top 20 dominated by broadcasters' soaps, daytime shows and long-running US sitcoms. This isn't a surprise because this sort of comparison favours shows with lots of episodes and high frequency.

Just as in 2019, licensing broadcaster content remained important to Netflix with Friends still its top show based on total views and its only show in the top 10. Another Netflix catalogue favourite, The Big Bang Theory, came in at number 15 (five spots below Channel 4's broadcast of the same show).

Views per episode

As with 2019, we also compared the number of views per episode (not including one-off shows such as prime minister's statements, VE day celebrations, and sporting events). This avoids the number-of-episode bias.

Once again, the general mix is very similar when we look at the data this way – mostly popular broadcaster entertainment shows and drama series (see table top right).

In 2019 the top 20 based on episode views was exclusively broadcaster shows. But, in 2020, two Netflix shows have made it into the top 20: The Stranger (a drama) and Tiger King (a docuseries).

What about Amazon Prime Video?

Digital-i does capture Amazon Prime Video viewing on their panel, but they don't have a full year of consistent datacollection yet, so we can't include it in these tables.

What the existing data highlights though, is that, unlike Netflix, Amazon's top-performing content is dominated by films rather than TV series. Preliminary 2020 data suggests the top-performing TV shows for 2020 on Amazon Prime Video were The Office US and Grey's Anatomy, which have comparable total HH views to The Umbrella Academy and The Fall (circa 100m views).

Top 20 most-viewed TV programmes per episode in the UK 2020

Rank	Viewing Source	Programme	HH views per episode (000s)
1	Channel 4	The Great British Bake Off	10,044
2	BBC	Strictly Come Dancing	9,525
3	ITV	Des	9,031
4	ITV	Britain's Got Talent	8,834
5	ITV	Ant and Dec's Saturday Night Takeaway	8,720
6	ITV	I'm A Celebrity... Get Me Out of Here!	8,604
7	ITV	The Masked Singer	8,440
8	ITV	Quiz	8,394
9	ITV	White House Farm	8,249
10	ITV	Van der Valk	7,992
11	BBC	The Salisbury Poisonings	7,953
12	BBC	Call the Midwife	7,515
13	Netflix	The Stranger	7,177
14	BBC	Countryfile	7,086
15	BBC	Michael McIntyre's The Wheel	7,072
16	ITV	Dancing on Ice	7,067
17	BBC	The Nest	7,041
18	Netflix	Tiger King: Murder, Mayhem and Madness	6,971
19	BBC	The Pale Horse	6,925
20	BBC	Silent Witness	6,834

Source for TV = BARB, one minute household reach; includes viewing to repeats broadcast within 28 days of first transmission; excludes device viewing. Netflix = Digital-i SoDA, viewing within 28 days of series release. NB: Excludes 'one-off' programming, e.g. prime minister's statements, VE day celebrations, and sporting events, etc.

Top 10 most-viewed Netflix TV programmes per episode in the UK 2020

Rank	Programme	HH views per episode (000s)
1	The Stranger	7,177
2	Tiger King: Murder, Mayhem and Madness	6,971
3	After Life	6,072
4	The Crown	6,108
5	Sex Education	5,184
6	The Umbrella Academy	5,296
7	The Haunting of Bly Manor	4,803
8	The Queen's Gambit	4,519
9	Emily in Paris	4,125
10	Jeffrey Epstein: Filthy Rich	4,050

Source: Digital-i SoDA/BARB 2020

A taster of 2021 shows to get excited about

Spring

The Masked Dancer ITV

Britannia Sky Atlantic

Meet The Richardsons Dave

Intergalactic Sky One

Moneyball ITV

Frank of Ireland Channel 4

Viewpoint ITV

Murder, They Hope Gold

Too Close ITV

↗ Intergalactic, Sky One
↗ Love Island, ITV
↗ Lions Tour 2021, Sky Sports
↘ Too Close, ITV

Summer

Love Island ITV

Summer Paralympics 2021 Channel 4

Lions Tour 2021 Sky Sports

2020 UEFA European Football Championship ITV

Big Zuu's Big Eats Dave

Celebrity Gogglebox Channel 4

Premier League 21/22 Sky Sports

↑ Celebrity Gogglebox, Channel 4
← Meet The Richardsons, Dave

Autumn

Taskmaster Channel 4

The Great British Bake Off Channel 4

Manhunt II: The Night Stalker ITV

My Name Is Lizzie Channel 4

Angela Black ITV

All Creatures Great and Small Channel 5

Wheeler Dealers: Dream Car Discovery

Gogglebox Channel 4

↗ Angela Black, ITV
↗ Stath Lets Flats, Channel 4
↗ Traces, Alibi
↘ All Creatures Great and Small, Channel 5
↓ Taskmaster, Channel 4
↘ Manhunt II: The Night Stalker, ITV
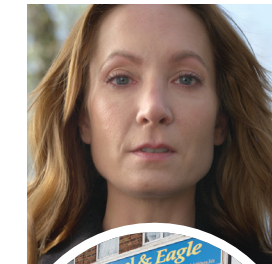
Winter

Stath Lets Flats Channel 4

Traces Alibi

I'm A Celebrity… Get Me Out Of Here! ITV

Sharks with Steve Backshall Sky Nature

Advertising in 2020

Ant and Dec's Saturday Night Takeaway, ITV

The video advertising landscape

Understanding video viewing is essential. But what really matters to people in advertising is where ads get seen. The first job of any medium is to help advertisers get their message across which, in the video world, is ideally in full and with sound. Here we see how things looked in 2020.

Summary:

— Broadcaster TV advertising accounted for 91% of all video advertising (77% for 16-34s)

— YouTube accounted for 5.6% of video advertising

— From nothing, TikTok took 1.4% of video advertising

— BVOD advertising increased by 22% and is vital for reaching lighter viewers

TV accounted for 91% of all video advertising...

This is a slight decrease from 2019 when it was 94%, but broadcaster TV remains by far the main way of getting video advertising seen, including for 16-34s for whom it makes up 77% of the video advertising they see.

Why is YouTube so small?

YouTube is the dominant online video platform in terms of ad time, accounting for 5.6% of all video ad viewing (64% of all online video). Amongst 16-34s this grows to 15.5% of all video advertising (68% of all online video).

But, yes, YouTube's share of total video ad viewing can seem at odds with its share of video viewing. YouTube is undoubtedly a big player in the video viewing world, but this doesn't carry over to the viewing of advertising on YouTube.

Broadcaster TV accounts for 91% of our video advertising day...

Average video time per day

All Individuals:
19 mins

16-34s:
12.5 mins

All individuals
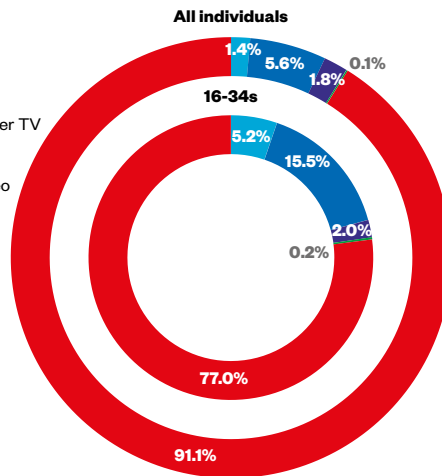- 1.4%
- 5.6%
- 1.8%
- 0.1%

16-34s
- 5.2%
- 15.5%
- 0.2%
- 2.0%
- 77.0%
- 91.1%

Legend:
- Broadcaster TV
- Other online video
- TikTok
- Cinema
- YouTube

Source: 2020, BARB/comScore/Broadcaster stream data/IPA Touchpoints 2020/Rentrak

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This is because YouTube doesn't put advertising across a vast amount of its inventory and the majority of viewing to YouTube is to its very long tail of content. Also, many ads on YouTube are skippable and some users have installed ad blockers for .com viewing of YouTube.

TV, on the other hand, has a scale and breadth of high-quality content that means it has the capacity to cater for thousands of advertisers simultaneously; most TV ads are unskippable; and TV ads are unblockable.

TikTok emerges – and a word of caution

In 2020 TikTok came from nowhere to account for an estimated 1.4% of all video advertising viewing – no mean feat if you consider Facebook's share of video advertising viewing is too small to unpick from 'other online video'.

But a word of caution on this estimate. We don't have an official data source for how much time is spent watching video advertising relative to content on TikTok.

For YouTube, we use comScore data to tell us the relationship between the volume of ads and the volume of content. But this kind of data isn't available for TikTok. So to work round this we've assumed that the relationship between time viewing content and viewing advertising on TikTok is the same as YouTube (2% of all time watching YouTube is spent watching advertising).

However, as TikTok's ad model is different from YouTube (its ads can be skipped immediately rather than after 5 seconds), its 1.4% share of video advertising time is likely to be on the generous side. Also, as a relatively new platform whose content is largely user-generated, ensuring brand safety and brand appropriateness will be a priority for any advertisers considering it.

BVOD is a key part of total TV advertising

By breaking the broadcaster AV advertising time down by type, we can see that whilst live TV is the primary means of getting ads seen, both playback, where ads are watched back at normal speed within recorded content, and BVOD

make up a significant chunk of ad viewing time – especially amongst younger audiences. N.B. advertisers only pay for ads watched in playback at normal speed.

As we'll cover later, whilst the proportion of video advertising time within BVOD is relatively small compared with linear TV, BVOD audiences are made up of lighter linear viewers. So BVOD now plays a crucial role in driving cost-effective reach.

Breaking down how we watch broadcaster TV advertising

17.6 mins

Individuals
- 4%
- 7%
- 89%

9.7 mins

16-34s
- 12%
- 11%
- 77%
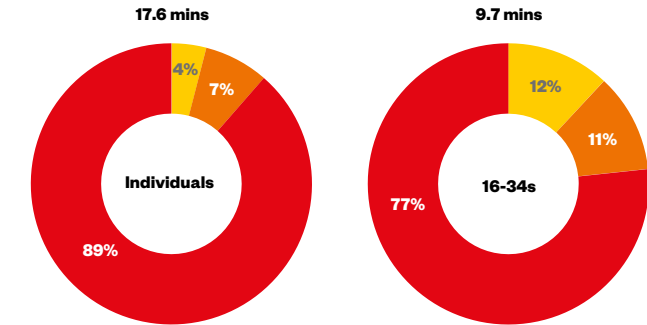
Legend:
- Live TV
- Playback TV
- Broadcaster VOD

Source: 2020 – BARB/Broadcaster stream data

Increased viewing of live TV has driven an uplift in AV ad viewing

Mins of AV ad views per person per day (all individuals)

Years: 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020

Legend:
- Live TV
- Broadcaster VOD
- Other online video
- TikTok
- Playback TV
- Cinema
- YouTube
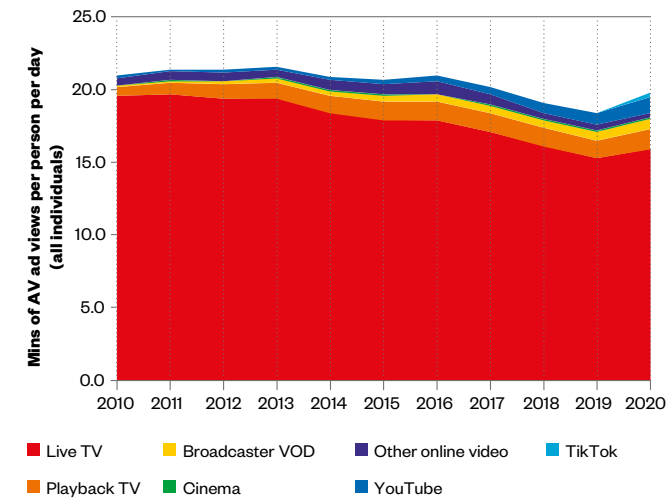
Source: 2010–2020, BARB/Broadcaster stream data/IPA Touchpoints 2020

Live TV viewing gave video advertising a bounce

The increase in video viewing in 2020 caused an uplift in time watching video advertising. Live TV, which converts content viewing to advertising viewing so effectively, is the biggest influence on total video ad viewing time. The average person watched an additional 0.7 minutes a day – a 5% increase year-on-year. BVOD advertising increased by 22% taking the total time spent viewing TV advertising to 17.6 minutes.

16-34s' video ad decline paused – or halted?

Amongst younger audiences, video advertising as a whole has been gradually declining during the last five years in line with declining viewing to live TV. This trend was ended by the impact of Covid, with total video advertising among 16-34s growing for the first time in four years.

68% of adults watch 50+ linear TV ads a week

Using a sample of two weeks in May, we can get a richer understanding of the nature of TV advertising on linear TV. Average numbers of time spent viewing video advertising across the population as a whole are useful, but viewing behaviour isn't consistent from person to person. So we get a better understanding of TV's ability to drive reach by breaking viewers down in terms of the number of ads they watch in a week.

In 2015, 80% of the UK would watch over 50 linear TV ads a week making them relatively easy to reach. By 2020 this number was 68%. That's still the majority of the population, but the drop highlights the need to look elsewhere to reach a higher percentage of the population.

It is worth noting that a further 16% (8 million) can be reached through linear TV but, as they watch under 50 ads a week, the odds of reaching them are lower. It requires clever programme selection to get into the shows that harder-to-reach audiences tend to watch.

AV advertising for 16-34s grew in 2020

Mins of AV ads viewed per person per day (16-34s)

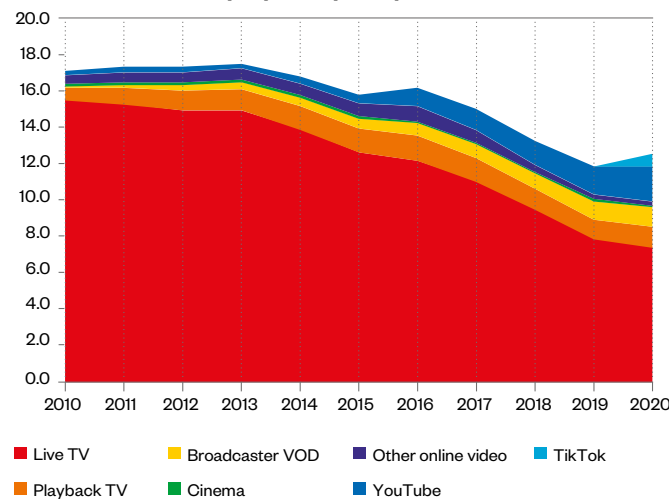Legend: Live TV, Broadcaster VOD, Other online video, TikTok, Playback TV, Cinema, YouTube

Source: 2010–2020, BARB/Broadcaster stream data/IPA Touchpoints 2020

68% of adults watch over 50 linear ads a week

Proportion of population %

	2015	2019	2020
501+	11.5m	10.5m	12.6m
301–500	8.2m	7.1m	6.3m
201–300	6.1m	5.1m	4.7m
101–200	8.6m	7.5m	6.5m
51–100	5.1m	5.5m	4.8m
1–50	6.2m	8.5m	8.0m
None	4.0m	6.9m	8.3m

68% of adults can easily be reached through linear TV

No. of linear TV ads viewed per week

Legend: 501+, 201–300, 51–100, None, 301–500, 101–200, 1–50
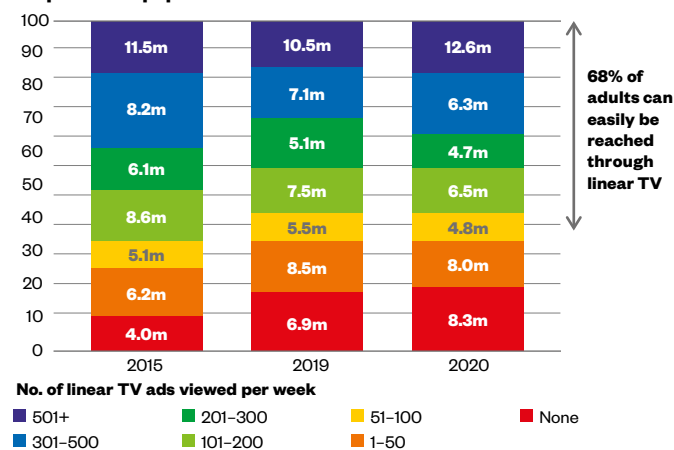
Source: BARB, Adults. Ads viewed at normal speed. Weeks 19 & 20 for each year (early May).

Use BVOD to reach lighter linear viewers

Using IPA Touchpoints data we can break down linear TV viewers into two groups – the lightest half and the heaviest half.

Using this data it's clear to see where you can add reach, with 65% of BVOD viewing generated by the lightest half of linear viewers. This means that the odds of reaching the lightest 50% of linear TV viewers through BVOD are 6.5 / 10 – nearly four times more likely than in linear TV.

⬇ 2020 ICC Women's T20 World Cup, Sky Sports

Lightest half of linear TV viewers watch majority of BVOD

	Linear TV Viewing	BVOD Viewing
Heaviest 50% linear viewers	83%	35%
Lightest 50% linear viewers*	17%	65%

Legend: Lightest 50% linear viewers*, Heaviest 50% linear viewers
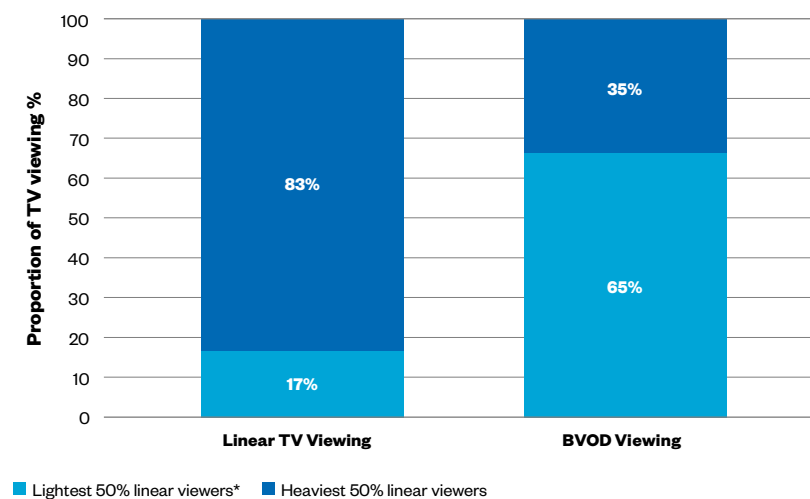
Source: IPA Touchpoints 2020 (lockdown), adults 15+. *'Lightest 50% linear viewers' includes non-linear viewers.

Video reach planning

Nominally, this bit is 'Video reach planning'. But it could equally be called 'Get ready for a lot of detail, but we promise it'll be worth it'. With AV widely acknowledged as the most powerful means of cementing your message in the minds of your target market, building maximum cost-effective reach for a given budget is top of most media planners' lists. But it's a complicated process. Here we explore the challenge. In detail. Lashings of detail.

No time for the detail? Here are the headline take outs:

— Advertisers should care more about maximising reach for a given budget than the campaign average CPT

— Direct Line Group's latest research shows that Facebook can't add cost-effective incremental reach to linear TV

— Lumen analysis reveals that TV and YouTube deliver the lowest cost per second of attention

— Research by Karen Nelson-Field shows that TV and BVOD deliver double the short-term sales impact of YouTube

— TV delivers the greatest signals of brand strength and quality, according to research from house51

— We need to avoid commoditising video and plan based on effectiveness; the Demand Generator is a great starting point

Total TV builds cost-effective reach

16-34 cover guide

Source: BARB BVOD Planner (6 weeks 31st Aug to 11th Oct 2020)/natural delivery average linear CPTs for 2019 (2019 used rather than 2020 to avoid artificially deflated 2020 prices caused by the pandemic)
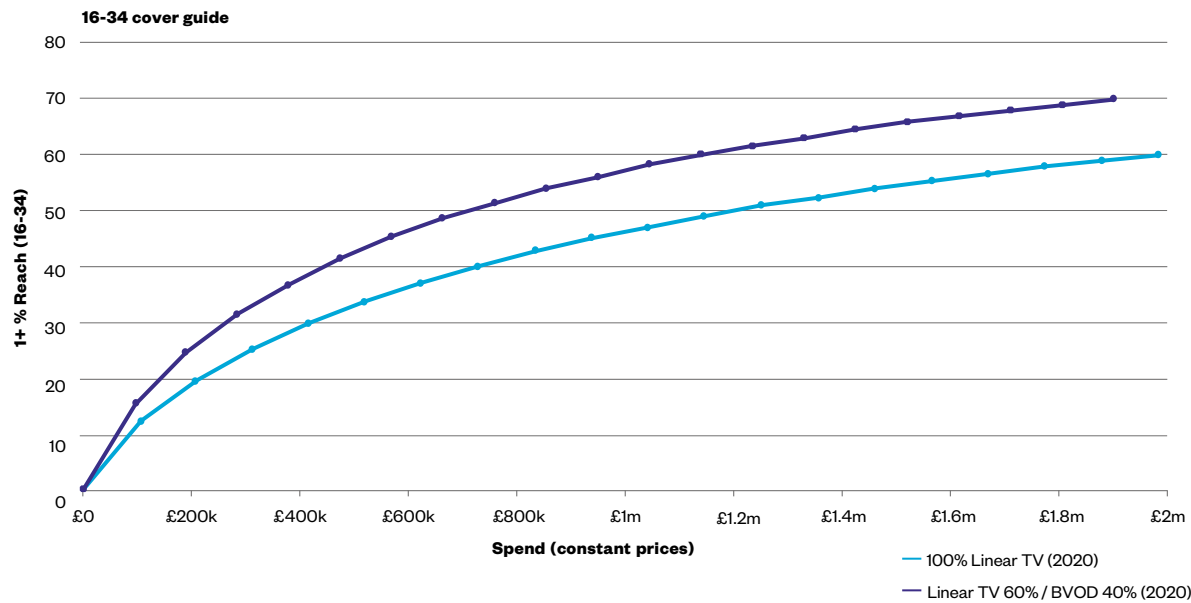
Reach should be the goal

Ehrenberg Bass won the argument. No, not a fancy fish, an esteemed marketing science unit in Australia and home to Byron Sharp. Their work has put to bed the concept that you can tightly target your way to long-term growth. Reach is now widely accepted as a fundamental driver of growth – reach should be the goal.

That's not to say there isn't a time and a place for the intelligent use of data to achieve tactical objectives however – and there's still a debate over market segmentations vs. needing to target every potential buyer in your category.

Total TV builds cost-effective reach

As TV viewing has spread across linear and on demand, TV's ability to deliver high volumes of cost-effective reach has changed and BVOD has become even more important on the plan (see p.17).

The latest data from BARB's new total TV planning tool clearly shows how planning linear and BVOD together delivers much higher levels of reach at lower AV budgets – especially for younger audiences.

And the broadcasters are hard at work on the CFlight measurement initiative. This will combine BVOD log data and BARB linear data to provide advertisers with the total reach of their campaigns across all forms of TV.

The complexities of reach planning for different audiences

Making the case for optimal reach planning for an audience like 16-34s across all forms of TV is relatively straightforward.

Linear TV is slightly more expensive than BVOD for this audience, but linear continues to have the majority of scale in terms of total ad views (88%, as seen on p.17), so combining both forms of TV together to achieve maximum effect is a logical solution.

Reach planning for, say, ABC1 adults is much less straightforward. Here, the average cost of a thousand ABC1 adults seeing a 30-second TV spot is about half as much on linear TV as it is on BVOD. Linear TV also accounts for the vast majority of ABC1 adults' TV viewing. So why would an advertiser want to buy BVOD at double the price to reach ABC1s?

To answer this, we must return to our original goal: reach. We should care more about driving the highest level of reach at the lowest total cost than trying to achieve the lowest possible cost per thousand.

The optimal TV mix depends on budget and reach goal

The chart below shows a useful metric to visualise the reach planning challenge; cost per incremental reach point. This is the budget required to get an ad seen by an extra 1% of a target audience – in this case, ABC1 adults.

As you can see, this cost changes as various levels of reach are achieved. The chart compares the cost of delivering an additional 1% reach between a campaign bought solely across linear TV and one where the budget is split 80% linear/ 20% BVOD.

At low levels of reach, a linear TV-only campaign is cheaper. Once you've reached 10% of ABC1 adults, the cost to get to 11% with a linear-only campaign is £5.7k, whereas a blended linear/BVOD campaign would be £6.9k.

A linear-only campaign continues to be cheaper at driving incremental reach until you hit the 30% reach mark. Then the trend reverses and having a linear/ BVOD blended campaign becomes more and more cost-effective at driving reach. To get from 70% to 71% reach for ABC1 adults would cost £89.7k with a linear-only campaign, but £66.9k for a blended campaign – a saving of £23k.

This is because, as we saw on p.18, lighter linear viewers are much easier to reach in BVOD than they are on linear TV alone.

All in all, the cost of reaching 70% of ABC1 adults using a linear TV alone is £1.6m. The cost for a blended BVOD campaign is £1.4m.

The optimal mix for a brand will depend on its budget and reach goal. Smaller budgets with lower reach targets might well be better purely using linear. But the case is clear for larger budgets with higher reach goals to plan using a blend of linear and BVOD.

You can plan & measure TV and BVOD together; online video is trickier

But TV does not have a total monopoly on reach and marketers understandably also want to combine TV with other video platforms to grow reach even further.

And the video platforms will be knocking on their doors, selling their platforms, using their own proprietary tools to justify the share of budget they feel is rightfully theirs. This is where it gets tricky.

Linear TV and BVOD are essentially the same thing. Same ad format, same content environment, same regulation. The majority of viewing is delivered on the big screen, the sound is on and the ads are not skippable and so play through all the way from start to finish (and ads that are fast-forwarded are not charged for). The happy consequence is that you can plan them together, apples with apples.

The same does not apply to the various forms of online video. They are a galaxy of very different things.

So, what can we do? Thankfully, to help us navigate the reach planning minefield, there have been several recent studies that have started to dig into the detail of the reach challenge. Let's have a look at them…
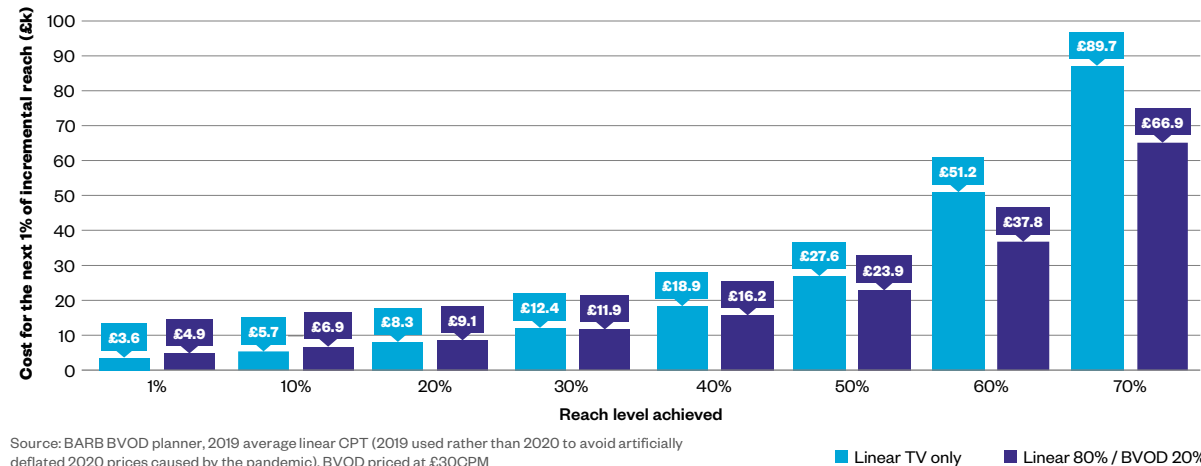
Direct Line Group
BVOD and YouTube are key to incremental reach

Direct Line Group (DLG) operate a best-in-class approach to marketing data science. They wanted to determine the optimal media solution for driving cost-effective reach.

Through previous analysis (read their brilliant IPA paper 'They went short. We went long'), DLG had built the business case for brand-led AV advertising. They had the evidence to show that investment in TV advertising would drive better returns in the long term than investing more money into activation channels.

But, with TV viewing spreading across linear and on demand, and the cost of driving high levels of reach through linear TV alone increasing, the business challenge was how DLG could continue to drive high levels of cost-effective reach.

Crucially this had to be reach that would continue to deliver on the long-term goals the business had already proven worked; reach via ads that drive an emotive connection between a consumer and a brand. This meant factoring for video starts and partial views to account for their ability to tell a story and deliver against these longer-term goals.

DLG designed an experiment with research company Audience Project to explore the most cost-effective means of driving incremental reach once a campaign had hit 70% of all adults

cover through linear TV. Audience Project used their audience panel to model the incremental reach to linear TV delivered by AV campaigns running on Facebook, Twitter, YouTube and BVOD.

The chart below shows the cost of driving an extra 1% of incremental reach once a linear TV campaign has reached 70% of all adults, indexed against the cost of using linear TV alone (i.e. an index of 200 would be twice as expensive as using linear TV alone, and an index of 50 would be half the cost).

In terms of incremental reach, Facebook, YouTube and BVOD all offered a more cost-effective solution than continuing with linear TV. However, when factors for visual attention and viewability were taken into consideration, the cost of Facebook and Twitter skyrocketed so the cost effectiveness plummeted. YouTube and BVOD were the only viable solutions for building incremental reach at a lower cost than simply spending more budget on linear TV once 70% reach had been achieved. Although, DLG note that all BVOD was delivered on the TV screen, versus YouTube which was predominantly delivered on devices and therefore less likely to deliver the required impact that big screen advertising is proven to deliver.

Cost per incremental reach point (ABC1 adults)

Source: BARB BVOD planner, 2019 average linear CPT (2019 used rather than 2020 to avoid artificially deflated 2020 prices caused by the pandemic), BVOD priced at £30CPM

■ Linear TV only   ■ Linear 80% / BVOD 20%

Direct Line Group
Cost per incremental reach point analysis

| After 70% reach to adults on linear TV | Adults (Cost index for additional point of reach) |

Source: Audience Project   ■ Facebook   ■ Twitter   ■ YouTube   ■ BVOD

SAM TAYLOR
HEAD OF GROUP COMMERCIAL/
PERFORMANCE MARKETING, DLG

"
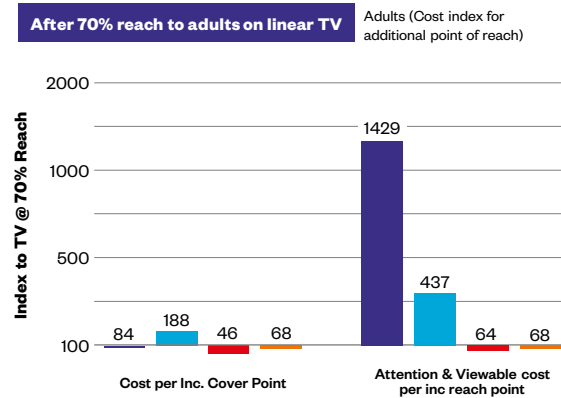
A key area of focus for effective incremental reach is viewability, attention and completion, because, after all, not all impacts are equal. We also need to remember that this is only one piece of the measurement puzzle.

We need to understand the channels from all areas and let our investment decisions be guided by econometrics and brand metrics too if we want these learnings to drive positive changes to our business outcomes.

"

Lumen
Based on attention, TV and YouTube are most cost-effective

This issue of attention to advertising is increasingly gaining more, well, attention. Lumen specialises in using eye tracking to assess how much visual attention advertising receives across different formats. They conducted a comparative analysis to determine the relative cost per second of attention.

What they discovered is that TV and YouTube are the most cost-effective channels based on attentive seconds, and Facebook infeed and mobile web/digital display are much less cost-effective – so backing up the DLG findings.

◩ The Great British Bake Off, Channel 4

Cost per '000 attentive seconds

Cost per '000 attentive seconds

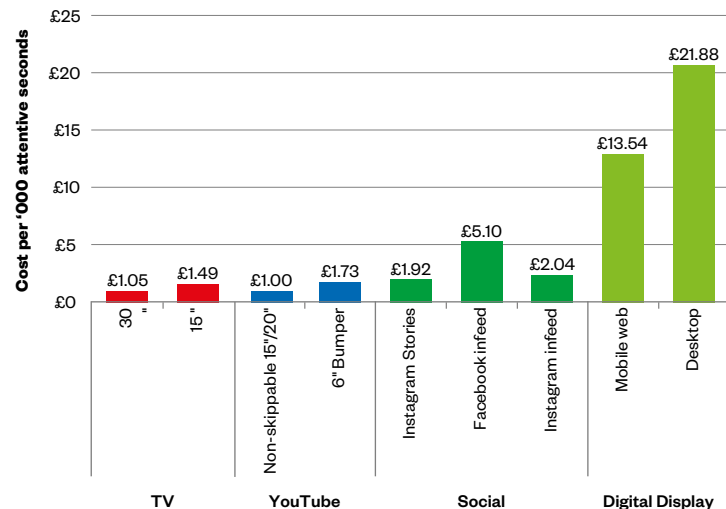| Channel	Format	Cost
TV	30"	£1.05
TV	15"	£1.49
YouTube	Non-skippable 15"/20"	£1.00
YouTube	6" Bumper	£1.73
Social	Instagram Stories	£1.92
Social	Facebook infeed	£5.10
Social	Instagram infeed	£2.04
Digital Display	Mobile web	£13.54
Digital Display	Desktop	£21.88

Source: Lumen, WARC Dec 2020

Karen Nelson-Field
Facebook video doesn't help sales

The latest Karen Nelson-Field research study – 'Not all reach is equal' – takes a similar angle to Lumen by examining the role of attention, but she also links this to advertising effectiveness via sales uplift.

The measure she uses is called STAS (short-term advertising strength) and an index of 100 is equivalent to the sales you would generate without running any advertising. As you can see to the left, BVOD drives the highest STAS index of 138, with linear TV close behind with 129. YouTube delivers an index of 112, Instagram is just over 100 and Facebook didn't deliver any measurable impact.

The results rank the performance of the channels in a similar order to that of the Lumen study. But what's interesting is that YouTube, which is on a par with TV in terms of cost per second of attention in the Lumen research, falls behind TV by some way in Karen Nelson-Field's study. Why?

TV grabs attention and denotes quality

There are several things that could explain why YouTube falls behind TV.

It could be that viewers' attention is fixed on YouTube's skip button (Channel 4's 'Not all VOD is the same' study showed this). High visual attention to the start of an ad may be less powerful than part visual attention to the whole ad, where the audio plays a role in joining together the whole message in our minds. One factor that is also likely at play here is the signalling power of different media. Our study with house51 (see p.36) uncovered the differing ability of media channels to communicate brand 'fitness'. This is often known as the 'As seen on TV effect' – if an advertiser can afford to be on TV and make their promises so publicly, it must be a credible, high-quality product.

house51 found that TV advertising carried the highest costly signal of all the media tested, with social and online video platforms at the other end of the scale. So, people may give reasonable attention to ads on YouTube, but they perhaps don't perceive the products they see advertised to be great quality.

Sales uplift indexed by video type

STAS Index	🖥️	📱
TV	129	—
BVOD	—	138
YouTube	—	112
Instagram	—	105
Facebook	—	100

Source: Karen Nelson-Field, Screenforce DACH 'Not all reach is equal'

Signalling power by medium

Fitness signals (% positively scoring / agreeing to statements)

	Confidence	Final strength	Quality
TV	58	50	43
Newspapers	49	32	34
Magazines	45	32	38
Radio	49	32	37
Social Media	40	21	19
Video sharing sites	42	20	22

Legend: ■ TV ■ Newspapers ■ Magazines ■ Radio ■ Social Media ■ Video sharing sites
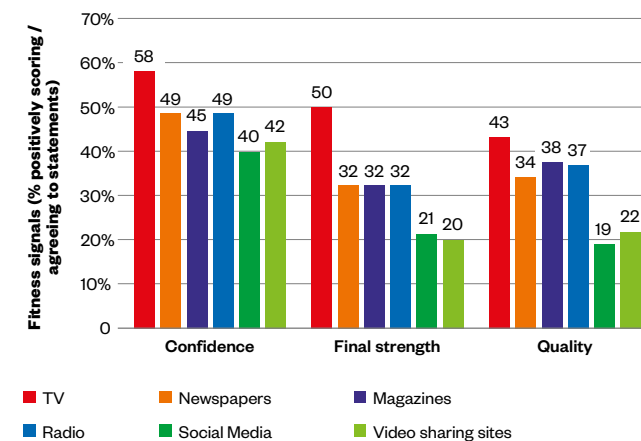
Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

Not all forms of video are equal – so not all reach is equal

Even if we reduce different types of video right down to an equivalenced cost per second of attention, they are still not equivalents. There's much more nuance that needs to be taken account of, such as the way they're viewed, the screen they're viewed on, the environment they're viewed within, and the resulting impact on our cognitive biases.

In some ways, it would be so much easier if all video were commoditised. This would create a handy mechanism for reach planning, and a simple means of justifying media decisions to the financial and procurement teams. But it wouldn't lead to more effective media planning.

Start with historic effectiveness

The best way through all this is to start with historic effectiveness analyses – make decisions and shape media plans based on evidence of what has worked and in what combination. This could either be brands' own effectiveness data or, if that isn't available, then the Demand Generator tool created by MediaCom, Wavemaker and Gain Theory is freely available. It enables you to plug in the details for your brand and look at the optim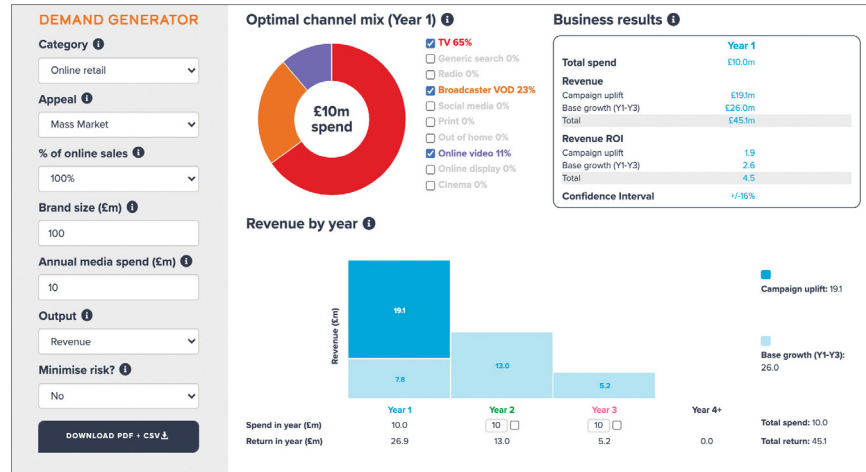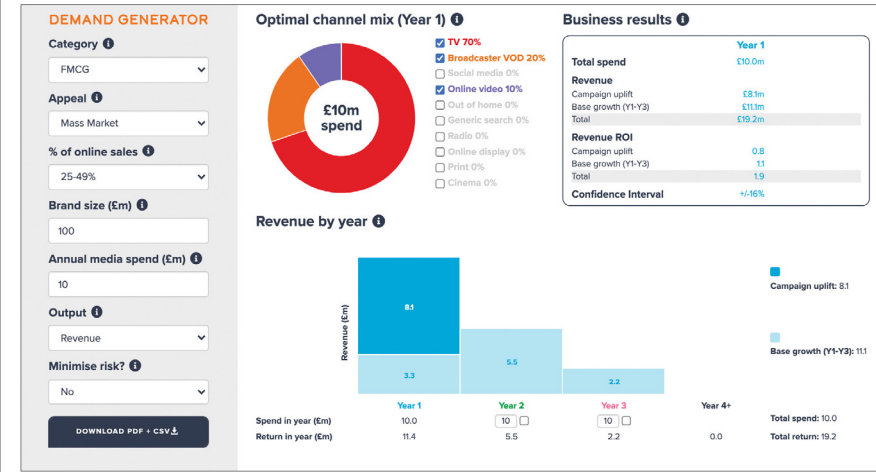al media split for your campaign, including how the video part breaks down by platform. It's based on £1.4bn of media spend from 50 advertisers, so it's a robust, evidence-based starting point for you to assess the relative importance of different video channels.
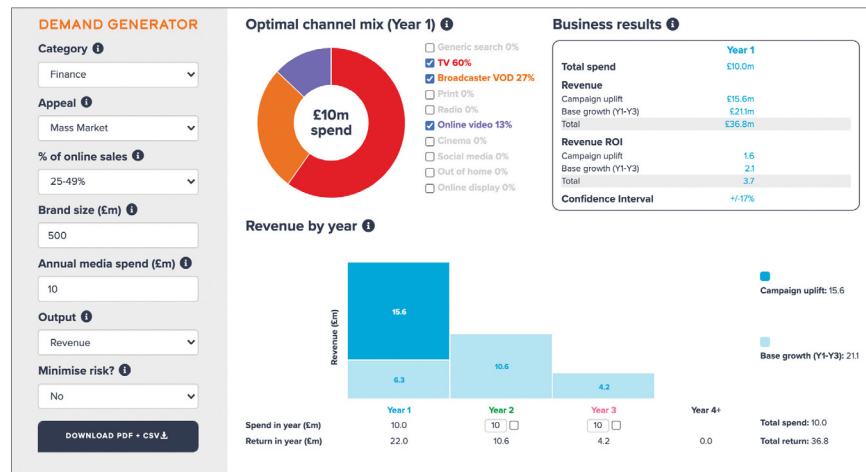
Online Retail

DEMAND GENERATOR

Category ⓘ
Online retail

Appeal ⓘ
Mass Market

% of online sales ⓘ
100%

Brand size (£m) ⓘ
100

Annual media spend (£m) ⓘ
10

Output ⓘ
Revenue

Minimise risk? ⓘ
No

DOWNLOAD PDF + CSV ⬇

Optimal channel mix (Year 1) ⓘ

£10m spend

- ☑ TV 65%
- ☐ Generic search 0%
- ☐ Radio 0%
- ☑ Broadcaster VOD 23%
- ☐ Social media 0%
- ☐ Print 0%
- ☐ Out of home 0%
- ☑ Online video 11%
- ☐ Online display 0%
- ☐ Cinema 0%

Business results ⓘ

	Year 1
Total spend	£10.0m
Revenue	
Campaign uplift	£19.1m
Base growth (Y1-Y3)	£26.0m
Total	£45.1m
Revenue ROI	
Campaign uplift	1.9
Base growth (Y1-Y3)	2.6
Total	4.5
Confidence Interval	+/-16%

Revenue by year ⓘ

Campaign uplift: 19.1

Base growth (Y1-Y3): 26.0

	Year 1	Year 2	Year 3	Year 4+	
Spend in year (£m)	10.0	10	10		Total spend: 10.0
Return in year (£m)	26.9	13.0	5.2	0.0	Total return: 45.1

Finance

DEMAND GENERATOR

Category ⓘ
Finance

Appeal ⓘ
Mass Market

% of online sales ⓘ
25-49%

Brand size (£m) ⓘ
500

Annual media spend (£m) ⓘ
10

Output ⓘ
Revenue

Minimise risk? ⓘ
No

DOWNLOAD PDF + CSV ⬇

Optimal channel mix (Year 1) ⓘ

£10m spend

- ☐ Generic search 0%
- ☑ TV 60%
- ☑ Broadcaster VOD 27%
- ☐ Print 0%
- ☐ Radio 0%
- ☑ Online video 13%
- ☐ Cinema 0%
- ☐ Social media 0%
- ☐ Out of home 0%
- ☐ Online display 0%

Business results ⓘ

	Year 1
Total spend	£10.0m
Revenue	
Campaign uplift	£15.6m
Base growth (Y1-Y3)	£21.1m
Total	£36.8m
Revenue ROI	
Campaign uplift	1.6
Base growth (Y1-Y3)	2.1
Total	3.7
Confidence Interval	+/-17%

Revenue by year ⓘ

Campaign uplift: 15.6

Base growth (Y1-Y3): 21.1

	Year 1	Year 2	Year 3	Year 4+	
Spend in year (£m)	10.0	10	10		Total spend: 10.0
Return in year (£m)	22.0	10.6	4.2	0.0	Total return: 36.8

FMCG

DEMAND GENERATOR

Category ⓘ
FMCG

Appeal ⓘ
Mass Market

% of online sales ⓘ
25-49%

Brand size (£m) ⓘ
100

Annual media spend (£m) ⓘ
10

Output ⓘ
Revenue

Minimise risk? ⓘ
No

DOWNLOAD PDF + CSV ⬇

Optimal channel mix (Year 1) ⓘ

£10m spend

- ☑ TV 70%
- ☑ Broadcaster VOD 20%
- ☐ Social media 0%
- ☑ Online video 10%
- ☐ Out of home 0%
- ☐ Generic search 0%
- ☐ Radio 0%
- ☐ Online display 0%
- ☐ Print 0%
- ☐ Cinema 0%

Business results ⓘ

	Year 1
Total spend	£10.0m
Revenue	
Campaign uplift	£8.1m
Base growth (Y1-Y3)	£11.1m
Total	£19.2m
Revenue ROI	
Campaign uplift	0.8
Base growth (Y1-Y3)	1.1
Total	1.9
Confidence Interval	+/-16%

Revenue by year ⓘ

Campaign uplift: 8.1

Base growth (Y1-Y3): 11.1

	Year 1	Year 2	Year 3	Year 4+	
Spend in year (£m)	10.0	10	10		Total spend: 10.0
Return in year (£m)	11.4	5.5	2.2	0.0	Total return: 19.2

You can find the Demand Generator here

Betty, Sky Comedy

Weathering the storm

All forms of advertising were blown off course by the events of 2020. Entire business sectors and some media were shut down. Advertisers understandably deferred or cancelled spend as they grappled with unique new challenges. The TV broadcasters reacted nimbly – and some advertisers even took advantage of the situation. Here's how TV advertising investment fared in 2020…

Need to know:

— TV advertising investment recovered as 2020 progressed, finishing the year at £4.35bn

— Online businesses remain the largest spending category

— 1,243 new-to-TV advertisers

TV got stronger as 2020 unfolded

TV revenues fell by around 50% in Q2 2020, but recovered to finish the year with a 12% annual decline. Total TV ad revenue, based on figures provided by the broadcasters, was £4.35bn.

The adjacent chart shows the ad revenue performance of the different media. Online search and display were the only channels to scrape year-on-year growth, both likely fuelled by the rise in ecommerce and increased focus on short-term activation.

YoY change in advertising revenue by media type
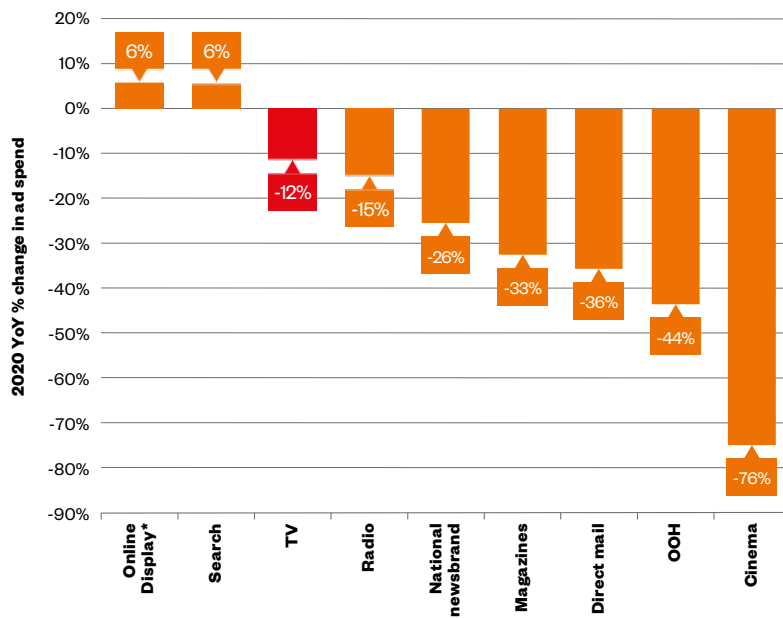
Source: TV revenue: Broadcaster revenue data (Inc all forms of TV), All other media: AA/WARC. Each media type is inclusive of online revenue. *Online display includes online forms of TV, Print & Radio

TV proved its worth – socially and commercially

TV undoubtedly benefited from the closure of cinemas and the challenges lockdown posed for outdoor. But TV also proved its worth in the pandemic. Both socially, as a source of vital entertainment, much-needed escapism, and trusted news; and commercially, as broadcasters were nimble-footed to increase their flexibility, allowing deferrals where possible and shortening advanced booking deadlines to four weeks (a practice that they've committed to continue to do going forward) to allow for more agile bookings. They also offered numerous incentives to advertisers such as help with creative production and airtime deals for SMEs and charities.

TV advertising to drive online-specific business is accelerating

Online businesses as a broad category remained by far the largest-spending set of advertisers on TV in 2020.

But, as 2020 turbo-charged ecommerce and most businesses now operate across both online and bricks and mortar, it's worth digging into this area a bit further, and looking at online-specific advertising activity (as opposed to more generic advertising activity, that isn't specifically focused on driving online traffic).

Doing this (see chart right) we see a big difference: generic spend significantly dropped, whilst online-specific activity soared (with the obvious exception of travel). This isn't a huge surprise because of the climate in 2020 with retail outlets closed for much of the year and the shift to ecommerce.

Online businesses are the biggest investors in TV
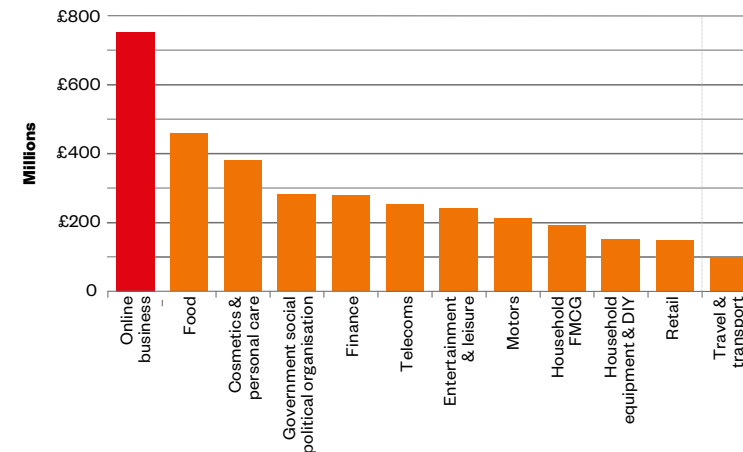
Source: Nielsen, 2020 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses. (Travel ranked 15th largest category)

Ad spend for online-specific activity grew across most sectors in 2020
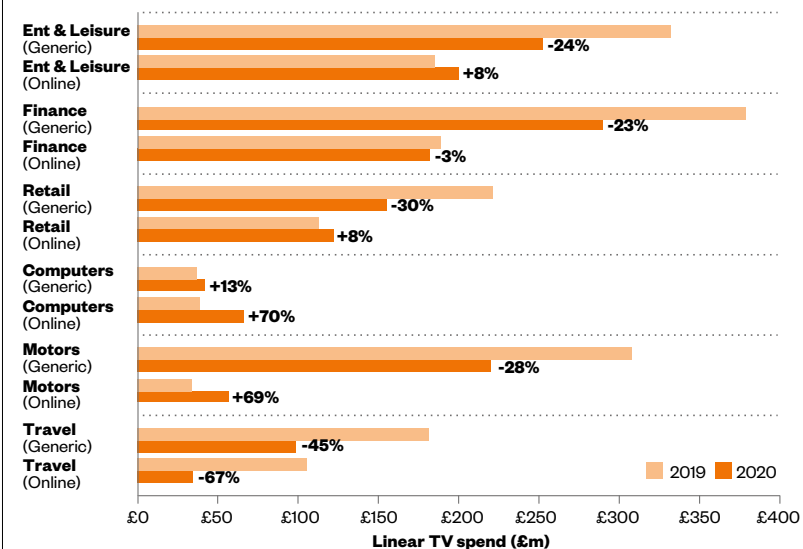
Source: Nielsen, 2020 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses. (Ranked by online specific spend 2020)

TV spend fluctuated by category

Breaking down patterns of spend to linear TV by category across the year gives a better understanding of the role TV played for different types of business in 2020 and how it changed through the course of the year (see chart below).

First there were **the L-shaped categories,** those that were hit badly by circumstances and stayed hit:
— Travel, after a positive start to the year, clearly saw the danger in March and from there on, despite a slight recovery in late summer, the story was bleak with spend severely diminished.
— Retail and Household equipment, despite coming back to positive year-on-year spend in October, both dropped back to year-on-year declines as lockdown hit again in November.

Then the **V-shaped categories** that bounced back.
— Motors saw an 80% drop in spend in April/May before stabilising in July to October and returning to growth, at the end of the year. There were some interesting

variations here with Volvo, MG and Kia all taking the opportunity of lowered TV pricing to increase their TV spend. Ford on the other hand dropped spend by around £10m.
— Entertainment & Leisure is a very diverse advertising category, encompassing fast food restaurants alongside film distributors and gambling businesses. So it is difficult to draw much meaning here. But, as a category, the worst of the impact seemed to happen in Q2 with normality returning in the second half of the year.
— Finance can just about be included in the V-shaped group with significant cuts in Q2 and a gradual return to normality by the end of the year.
— Food, supermarkets and food brands were all cautious initially, but returned to usual spend levels by August, and spent their deferred money in Q4.

Finally there were some **J-shaped categories** – last year was a pandemic, not a recession – and some were able to seize the growth opportunity at hand:
— Our need for everyday essentials remained unchecked and with

rock-bottom TV prices it was a great time to invest in your brand if you could. Many FMCG advertisers increased their TV investment overall compared with 2019. Unilever led the way, spending £65m more on linear TV advertising than they did in 2019 (a 130% increase). This bought them 16 billion more ad views in 2020 compared with 2019.
— With ecommerce booming, Online Retailers barely paused, with most months seeing a year-on-year increase in TV spend.
— As a good broadband connection became an even more vital component of a stress-free life, Telecoms, after some caution in Q2/3, saw some fairly steep increases in spend year-on-year.

There were 1,243 new-to-TV advertisers in 2020

Many of these were ecommerce business looking to supercharge their growth through TV. Notable newcomers included TikTok, Klarna, Find My Past, Duolingo and Farmdrop. To get a sense of why so many brands came on TV in 2020, it is worth looking at an example of what TV can do – and online car retailer Cazoo is a great one.

How TV helped boost Cazoo to £6bn

Cazoo is a British start up, founded just two years ago, that offers a simple and convenient way of buying used cars online, taking away the need to travel and haggle at a dealership.

Google Trends data can help us understand the impact that linear TV had on their business (see chart below). By looking at the change in volume of people using Google to search for 'Cazoo' we see an incredibly tight correlation with huge growth in the week their TV advertising started. Using a benchmark search term of 'used car' we can see that this clearly isn't a seasonal or 'lockdown' effect. This is advertising-driven growth in demand.

Cazoo's campaign was built around a combination of TV, outdoor, radio, print and some online (according to Nielsen data, Cazoo invested 50% of the ad budget in TV). So it would be unfair to claim all the credit here for TV. But with Cazoo now eyeing a £6bn public offering, this is a clear example of a highly effective multi-media campaign with TV at its heart.


How linear TV ad spend fluctuated across 2020 by category

'Shape'	Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
L	Travel & Transport	10%	2%	-53%	-99%	-98%	-96%	-61%	-58%	-55%	-70%	-87%	-71%
	Retail	-13%	-3%	-25%	-76%	-76%	-27%	-18%	-11%	-34%	-6%	-33%	-21%
	Household Equipment & DIY	-5%	27%	8%	-86%	-86%	-39%	-4%	-26%	-27%	-26%	-29%	-20%
V	Motors	-19%	-14%	2%	-75%	-79%	-24%	-15%	-9%	-2%	-9%	27%	22%
	Entertainment & Leisure	8%	2%	-6%	-39%	-51%	-31%	-3%	-17%	-9%	-15%	5%	3%
	Food	-15%	-7%	12%	-34%	-31%	-35%	-15%	10%	-7%	35%	9%	27%
	Finance	0%	7%	2%	-41%	-45%	-39%	-17%	-26%	-17%	-8%	-13%	23%
J	Household FMCG	-8%	5%	20%	-18%	-43%	29%	23%	34%	37%	73%	65%	37%
	Drink	-43%	0%	-9%	-20%	-41%	-59%	-26%	30%	51%	78%	17%	28%
	Telecoms	1%	-25%	-1%	-32%	-17%	-15%	-20%	7%	43%	-10%	40%	50%
	Online Retail	-10%	-28%	28%	5%	3%	22%	102%	-13%	2%	30%	46%	4%
–	Government Social Political	-10%	-7%	30%	87%	91%	98%	92%	39%	-23%	11%	61%	36%
	All categories	-8%	-3%	1%	-43%	-46%	-27%	-6%	-5%	-9%	0%	7%	1%

Source: Nielsen Ad Dynamix 2020 spend vs 2019 by month

TV advertising drove huge uplifts in search for Cazoo vs the category average
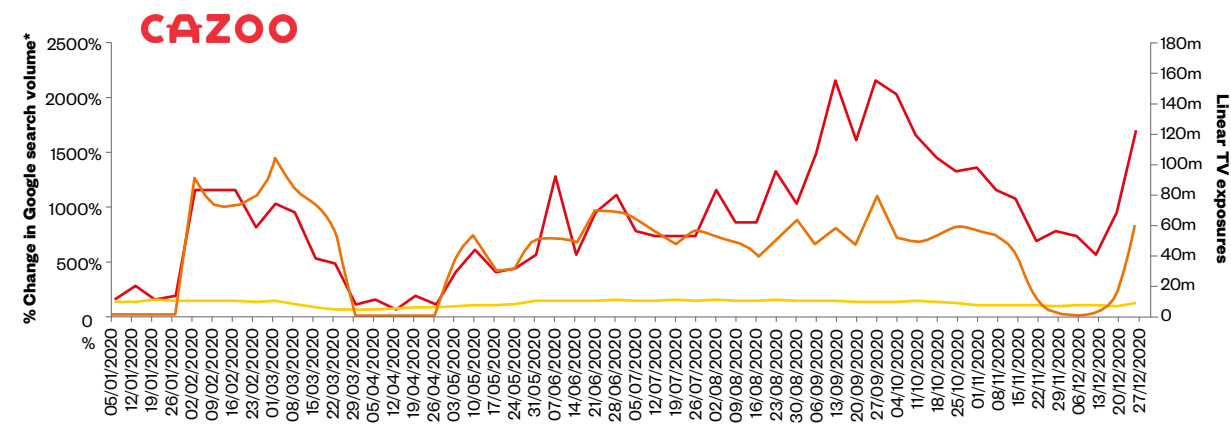
Source: BARB/Google Trends * vs the last 8 weeks of 2019

Search for 'Cazoo'   Search for 'Used car'   TV Exposures

And the winners were…

The Thinkboxes 2020

Our esteemed Thinkbox Academy of leading creatives honour the most outstanding TV ads on screen in our bi-monthly awards, created in partnership with Campaign.

the thinkboxes
In association with Campaign

It was an undeniably difficult year for creative agencies and their clients. As the world began to change in the first half of 2020, so did the response from brands. From messaging to practical considerations, a lot had to be stopped, amended or created from new. It really was a challenge like no other.

But rise to the challenge they did, and TV advertising continued to deliver inspiring, engaging and important messages to the nation. Clients and creative agencies worked together to produce creative campaigns in an ever-shifting landscape. We take our hats off to the winners and nominees…
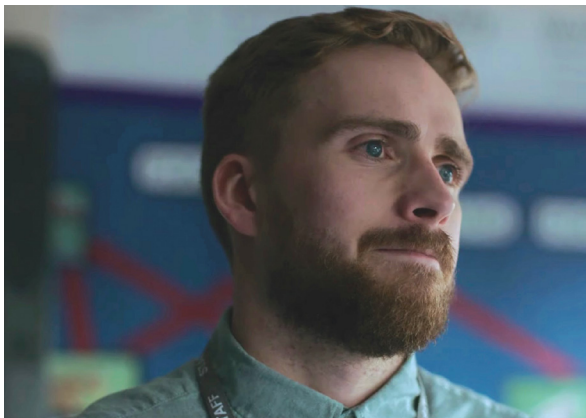
January/February
'Tuesday', Department for Education

Client Department for Education

Agency Havas London

Director 32

Creative Team Sam Turk, Paul Robbins, Lynsey Atkin

Production Company Pulse Films

Placing a real teacher at the heart of the TV ad added authenticity and intimacy to the work, which is part of the Department for Education's 'Every Second Shapes a Life' campaign.

"We wanted to invert the telescope and look at the many ways a single teacher can impact on the lives of children in a single day – looking at things from the teacher's perspective this time."

Nicola Keane
Head of Marketing, Department for Education

March/April
'Night Workers', McDonald's

Clients Ben Fox, Hannah Pain

Agency Leo Burnett London

Director Sam Brown

**Creative Team** Chaka Sobhani, Pete Heyes, Rory Hall, Steph Ellis, Lou Pegg

Production Company Rogue Films

Shot before the coronavirus crisis, this ad movingly portrays how the restaurant serves the night-shift workers who are often unseen by the rest of us.

"The flow of the cones off the truck, the firemen playing cards, the bump in the taxi, the welder's shadow and the patient being tucked in with care. An effortless blend of honesty and beauty."

Pete Heyes
Former Creative Director, Leo Burnett London
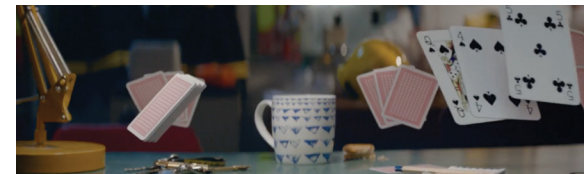
For more TV ad brilliance and to view all the shortlisted ads from 2020 click here

May/June
'This doesn't need to end', Cadbury

Client Mie-Leng Wong, Sam Greenwood, Colin O'Toole

Agency VCCP

Director Tom Sweetland

Creative Team Darren Bailes, Chris Birch and Jonny Parker

Production Company Clouded Vision

'This doesn't need to end' by VCCP for Cadbury shows raw examples of thoughtfulness for others during lockdown living – and encourages us not to let that end.

"We suppose the very unique way it was shot, mixed in with people literally living the feelings in the film, was a perfect storm. We managed to be in real people's homes, hearing their real stories. People responded very emotionally to this authenticity."

Darren Bailes
Executive Creative Director, VCCP

July/August

'That Feeling', AA

**Clients** Tracy Abraham and Will Harrison

Agency adam&eveDDB

Director The Perlorian Brothers

Creative Team Matt Woolner and Steve Wioland

Production Company MJZ

The commercial features Tukker, a long-haired dog, who embodies the response of a nation, denied for many months, the freedom of a car journey. Celebrating the feeling of getting back on the road, the spot aims to remind people that the AA is there by their side as they return to the driver's seat.

"There was a lot to get through in a very short space of time. From choosing thickness, colour and 'windsweep' of fur, to signing legal documents required for shooting during a pandemic."

Will Harrison
Head of Brand Marketing, AA
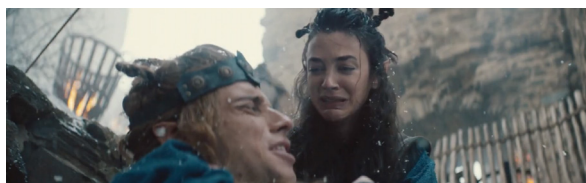
September/October

'Ironing', Amazon Alexa

Client Simon Morris

Agency Droga5 London

Director Andreas Nilsson

Creative Team David Kolbusz, Shelley Smoler, Jonathan Thake, Ethan Bennett

Production Company Biscuit Filmworks

Two contrasting worlds – the everyday and the epic – collide in this spot in which a pair of elvish warriors are seemingly repeatedly commanded to re-enact a death scene by a chap doing his ironing.

"There's a rich intrigue in the opening scene. It makes the viewer think this is a bona fide feature movie or perhaps a new premium TV series, and then we flip to the living room reveal. It's engaging for the viewer and not a straight hard see out of the gate."

Simon Morris
Global Chief Creative Officer, Amazon

November/December

'No Naughty List', Tesco

Client Alessandra Bellini, Emma Botton, Sarah Parmar

Agency BBH London

Director Raine Allen-Miller

Creative Team Daniel Seager, Steve Hall, Tom Drew

Production Company Somesuch

With 74% of the nation saying they wanted to see light-hearted content in this year's festive ad offering, the humorous Tesco advert shows people from across Britain worrying about the things that might put them on the naughty list this Christmas – from bad video call etiquette to buying too much loo roll.

"TV was an essential part of our media mix because of its power to build brands, story-tell and drive reach, and it was the most powerful way to create a shared moment through which people could connect and that would also help lift spirits."

Sarah Parmar
Head of Campaigns and Consumer PR, Tesco

"What we loved about 'No Naughty List' was the simplicity of the idea. People immediately got it, which meant once the main idea was locked, everyone got excited about how we could push and develop it further."

Dan Seager
Associate Creative Director and Art Director, BBH London

TV's transformation

We Hunt Together, Alibi

Advanced TV advertising at work

TV now has it all, and so can its advertisers.

Advanced TV advertising is the umbrella term for the multitude of technological and data-driven business solutions now available thanks to the broadcasters' video on demand services and, specifically, to AdSmart from Sky.

These new capabilities are making TV more flexible and more available to businesses of all sizes. Here we'll look at four of the main opportunities for advertisers – and four examples of brands making clever use of them.

Extending your reach

With TV viewing re-distributing across linear TV and on demand, advertisers now need to make sure that they're utilising the whole of TV in order to attain the highest possible levels of cost-effective reach.

To get up to speed with the incredible things happening right now in TV advertising. Download 'Advanced TV'

◀ ▶ Barclays

Barclays:
Using advanced TV to reach lighter viewers

In 2019, the financial marketplace was evolving and becoming increasingly cluttered and so OMD needed their AV strategy for Barclays to work harder than ever. They conducted analysis that showed that brand consideration is an important driver of sales and that weekly reach showed direct correlation with consideration. Weekly delivery is critical for keeping Barclays top of mind in a low-interest category.

The challenge for Barclays was how to maximise reach against their target audience of ABC1 adults. They decided to target lighter TV viewers in order to unlock unique cover for Barclays and bolster their AV strategy and so they partnered with Sky Media and AdSmart.

Sky has a wealth of set top data regarding viewing habits, which includes a robust pool of the lightest TV viewers.

Barclays became the pioneering test partner for AdSmart's custom-built light TV viewers segment running alongside linear TV to build incremental reach against this hard-to-reach audience.

With access to Sky's panel data, OMD built a bespoke tool to analyse potential programmes, channels, and times where they could reach light TV viewers. By using AdSmart in this way, they saw on average between 7% and 11% incremental reach for ABC1 adults and were able to maintain Barclays in-week share of voice without having to increase their TVR weight on linear.

As a result of this campaign, Barclays also saw an increase in spontaneous consideration within their category, a great example of how data can be used to make the most of any activity.

Geo-targeting

This works for businesses of all sizes and has made TV more attractive to more brands – many of whom would never have considered TV before.

For example, smaller businesses with highly specific geographical footprints, or larger businesses that want to upweight campaigns in areas where they have a high number of stores.

Advertisers can also run offers in certain areas but not others or use different creative based on the viewer's location.

SodaStream: Using geo-targeting for precision targeting

SodaStream is an iconic brand with very modern technology which substantially reduces single-use plastic bottles and offers a cheap source of sparkling water. In 2019, it was struggling to get significant high-street distribution but pre-Christmas, an opportunity arose to test in 80 large Boots stores across the country.

⬇ SodaStream

The challenge was to shift units both instore and online to a level that would encourage Boots to reorder and also build awareness of the new positioning of the brand, all with a total budget of less than £400,000.

Pintarget analysed data that showed that potential SodaStream users' media of choice was a mix of TV and online. Their solution was to create 80 hyper-local TV campaigns to target high-opportunity audiences close to specific stores using AdSmart from Sky technology.

The use of TV gave the brand stature, delivering a national-weight branding campaign but only in areas where there was distribution of the product. The objective was to communicate only to people who had the opportunity and intent to buy the product from Boots, and Pintarget's modelling work suggested this was potentially 650,000 homes out of a national population of 27 million homes. They were able to deliver a heavyweight campaign to a clearly defined target audience, defined by location and attitude.

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

Customised target audiences

By combining the broadcasters' first-party registration or customer data sets with other data sources that they have access to, advertisers can select from a huge array of targeted, customisable audiences.

For example, they can create audiences based on historic viewing preferences – so a food brand can target past viewers of food shows.

And they can combine detailed viewer data alongside their first-party data to create custom 'lookalike' audiences based on viewer interests, be it gaming, fitness, DIY or pretty much anything else you can think of. And, by combining broadcasters' first-party data with high-quality third-party data – through companies like Experian or Mastercard – brands can create tightly defined audiences, with confidence that the data they're using will accurately target the intended audience.

Hilton Hotels: Using custom-built audience to reach only the best prospects

Hotel chain Hilton wanted to raise awareness of their direct booking proposition. OMD's aim was to educate audiences that booking directly on the Hilton website as opposed to using other online travel agents is simple and can save you time and money.

To be more precise with their targeting, they used Mosaic Groups. Mosaic is a consumer segmentation model designed by Experian. It's a classification system which segments the population into 15 groups and 66 types that helps you to understand an individual's likely customer behaviour.

Through analysis, OMD found that the two Mosaic groups found to be most closely matched with Hilton prospects were the two named City Prosperity and Domestic Success. They combined these two groups to create a custom-built target audience.

The activity drove strong uplifts in spontaneous brand awareness with exposed groups 32% more likely to cite Hilton. Of those who recalled seeing the advert, 27% took some form of action as a result, 17% visited the website and 4% went on to book a room via the www.hilton.com website.

Customer data matching

Data matching is a rapidly developing and hugely exciting area, and all the broadcasters offer a means for advertisers to combine their own customer data sets with the broadcasters' own first-party data.

From targeting existing customers with specific promotions, to upweighting activity at the time a customer is coming to the point of a renewal, or targeting different customers with different creative based on what you believe is most likely to trigger a response – there are a host of opportunities on offer.

↗ Just Eat
◁ ⬇ Hilton Hotels
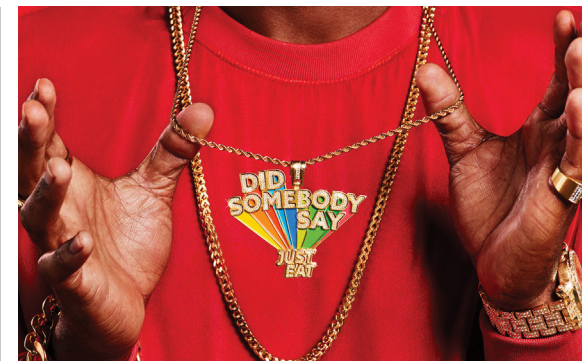
Just Eat: Matching their own data with Channel 4's viewing data

Just Eat wanted to improve consideration and to increase purchase of takeaways. UM decided that a good way to do this would be to target Just Eat's lapsed customers.

So, in 2020, Just Eat partnered with All 4 to trial their new advanced TV solution – Brandm4tch. The challenge was to activate Just Eat's first-party data in a way that didn't rely upon any cookie data and that was completely GDPR compliant. Working with data clean room Infosum and Channel 4's advanced data management platform Mediarithmics, the Brandm4tch solution allowed them to match users from Just Eat's CRM database with Channel 4's 24 million registered users.

This meant they were then able to target the highly valuable audience of lapsed Just Eat customers, delivering relevant advertising across all devices.

This sophisticated targeting approach delivered great results, measured by independent research agency MTM:

– 63% uplift for spontaneous brand awareness among the Brandm4tch audience

– Significant increase in percentage of people claiming to order in the last month*

– 38% uplift for consideration among the Brandm4tch audience vs all 16-34s adults.

*Unable to share exact uplift due to confidentiality.

It's terrific... we're aiming for 100% TV Masters

Not our words, but the words of the CEO of Wavemaker, Paul Hutchison. As we write this, some 6,253 people have so far signed up for the TV Masters online training course he's talking about. That's 6,253 people who are now cleverer and even better at their jobs. Here's what it's all about...

Since the launch at the end of 2020, we have welcomed students from every major UK media agency and from 341 brands including Direct Line, Nationwide, Samsung, Comparethemarket, Asda and Cancer Research UK.

TV Masters is the only comprehensive and CPD-accredited training course in TV advertising – and it's free. It's been designed in collaboration with broadcasters, agencies, and advertisers to help boost critical skills and knowledge across the industry.

The carefully curated syllabus will give you the knowledge and confidence to make you fluent in TV advertising. From the latest advanced TV solutions to the practicalities of planning and buying a TV campaign, it covers all the existing and emerging ways brands can work with TV to deliver business success.

95% likely or very likely to recommend to a colleague

97% scored the content excellent or good

> For someone focused on digital media 99% of the time, it was so refreshing and fun to complete the TV Masters course from Thinkbox. It's a brilliant course, highly recommended!

> I did a module one evening and used a piece of knowledge I gained from it in a presentation to a client the next afternoon!

> I'm a long way into my media career, but I was so impressed with this – I'm recommending it to everyone. Clear and memorable explanations not just of TV, but of some vital principles for anyone who works in advertising.

> Full of great, well-researched modules with up-to-date examples across the whole spectrum of TV in the UK. I'd recommend anyone working in marketing to look at doing this.

> It's great to see Thinkbox providing such a high-quality training course to help agencies and clients better understand the role of TV advertising in building brand reputation and growth in the digital era. TV Masters is essential learning for anyone entering the industry and is a helpful complement to the IPA's Foundation Certificate.

Janet Hull OBE,
Director of Marketing Strategy and Executive Director Effectiveness Week, IPA

Who it's for:

— Whether you're new to TV, an advertising allrounder or a media pro looking for a refresher, TV Masters is essential learning.

— It's designed to be as useful and practical to new starters with everything to learn, as it is to more experienced hands looking to refresh their knowledge and skills.

— Most likely, you'll work in marketing for a brand or at an advertising or media agency.

— You may even work at a TV company. Or you may be a business leader who wants to broaden their horizons and be able to ask your marketing teams and agencies some tricky questions.

What you'll achieve:

— A comprehensive understanding of today's TV and TV advertising

— Expertise on how TV works with other media

— An informed appreciation of TV's multiple marketing roles

— A command of the principles of advertising effectiveness and how TV drives business growth

— Confidence to discuss TV's digital transformation with clients and colleagues

— Insights, tips and skills to be more effective at work

— A career-enhancing qualification

Who it's for:

— It's free

— Spring, Autumn and Winter courses

— Up to 10 weeks to complete

— Learn at your own pace

— Six on-demand video modules

— Presented by TV experts

— Downloadable charts & additional reading

— Tests to help you learn

— Optional final exam to earn a Distinction

— CPD certified and IPA CPD hours eligible

Click here to enrol!

Click here to contact us

Just some of the brands who have signed up:

amazon | ASDA | adidas | CANCER RESEARCH UK | comparethemarket

CO OP | Direct Line | Expedia | IKEA | Johnson & Johnson

JUST EAT | L'ORÉAL | LLOYDS BANK | Nationwide | Nestlé

SAMSUNG | TSB | TESCO | TUI | Unilever

The smartest planning

Brassic, Sky One

Smart young things

What was it like to plan media in a year when plans got moved, cancelled and changed constantly? The 2020 Thinkbox Young TV Planner of Year finalists share their thoughts and what there is to be excited about in 2021.

Hypothetical, Dave

WINNER

CHARLOTTE KNOPE
ASSOCIATE DIRECTOR (BROADCAST), RUNNING TOTAL

Biggest planning opportunity of 2020/21?
We currently live in a world where the government's management of the pandemic can drastically affect a client's business overnight – flexibility for advertisers in market has been essential. 2020 became a year of relaxed late-booking charges and waived cancellation penalties. TV, a channel with notoriously long lead times, could suddenly be switched on and off within a matter of days. Such a gear change started to de-risk TV for advertisers and it was suddenly easier for agencies to sell TV as a core component to tactical 'lockdown-sensitive' media solutions.

What TV developments are you excited about in 2021?
The relentless sophistication of BVOD targeting definitely keeps things interesting. Two years ago, BVOD audiences varied little beyond BARB segmentation, yet today I have live campaigns that target TV viewers based on how many cars are on their driveway.

JAMIE CALLAGHAN
BUSINESS DIRECTOR CONNECTIONS PLANNING, OMD

Biggest planning opportunity of 2020/21?
It's been super interesting figuring out the best way to test the impact of stricter HFSS regulations across TV and also online.

What TV developments are you excited about in 2021?
(ITV Platform) Planet V, (Channel 4's) Brandm4tch, and Sky Analytics.

PLANET V

sky analytics

BRANDM4TCH
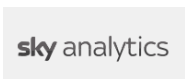
IAN DALY
HEAD OF AV, BOUNTIFUL COW

Biggest planning opportunity of 2020/21?
The whole planning cycle has been reduced from months to weeks, even days. Advertisers and agencies with their fingers on the pulse could be rewarded for quick thinking.

What TV developments are you excited about in 2021?
There's plenty to be excited about... TVs are getting bigger, better and smarter, and whilst they continue to dominate our attention there will be an abundance of planning opportunities.

GEORGE VINER
ASSOCIATE DIRECTOR, MEDIACOM UK

Biggest planning opportunity of 2020/21?
Addressable TV. With all the major broadcasters developing their offering in this area, I think we'll see many advertisers testing in this space. Sophisticated targeting means brands can target their audiences efficiently and cost effectively – opening up TV to more brands.

What TV developments are you excited about in 2021?
I am most excited about dynamic video creative in the addressable TV space. By 'dynamic video', I mean where the actual frames and script change based on a viewer's consumption circumstances so that the right creative can be delivered to the right individual at the right time. This can be done within programmatic video, but we will see this within addressable TV/VOD in 2021. Advertisers will see greater efficiencies on TV and equally excitingly, TV will be able to integrate further with other media channels where dynamic creative is already established (e.g. audio, display).

AIMEE SHEEHAN
MEDIA DIRECTOR AV, WAVEMAKER

Biggest planning opportunity of 2020/21?
Diversity and Inclusion – ensuring we are reaching all/more audiences through our channels and platforms – a standard, one-size-fits-all approach needs to evolve.

What TV developments are you excited about in 2021?
Data-matching capabilities across the broadcasters evolving, allowing for advertisers to be much more targeted in their video approaches.

GABRIELLA MICHALSKI,
INVESTMENT DIRECTOR AV, MANNING GOTTLIEB OMD

Biggest planning opportunity of 2020/21?
Pretty much everything. The pandemic has been a really tough experience for everyone but it has also been an opportunity for us to reappraise how we go about the day-to-day – how we work, how we plan media, how we collaborate with partners. I really think the biggest opportunity is getting back out there fast, being progressive, being agile and embracing these new rules.

What TV developments are you excited about in 2021?
Lockdown has massively boosted the volume of logged-in users to a whole array of content platforms. And with those users watching unprecedented (sorry!) volumes of content, we have accelerated to a whole new depth of understanding of TV viewers. Intelligence and insight that we can apply to every area of planning to make AV and, specifically, content more relevant but without losing scale.

Thinkbox TV Planning Awards 2020

This year the TV Planning Awards took place in the comfort of everyone's homes. Even though we didn't have to dress up, we still were able to celebrate award-winning campaigns. Our brilliant judges worked hard to make their choices, such was the high level of entries which stretched out across the expanse of solutions that TV can deliver. With a new category recognising the rising planners of the industry, there were plenty of happy faces throughout the celebration.

You can view all these great TV planning stories and find out more here

Grand Prix & Best integrated campaign

Saving the NHS one touchpoint at a time, Mediahub for NHS England

HIGHLY COMMENDED

Manning Gottlieb OMD, Wavemaker & OmniGOV Public Health England

SHORTLIST

m/SIX & VCCP Tango
OMD UK McDonald's

Best use of sponsorship

Hillarys' perfect home on 4, MediaCom UK for Hillarys

SHORTLIST

Republic of Media, Whyte & Mackay – Shackleton Whisky
the7stars, Foxy Bingo

Best use of content

Loyle Carner's Concrete Green, PHD Manchester & DRUM for Timberland

HIGHLY COMMENDED

MediaCom UK Lloyds Bank

SHORTLIST

Manning Gottlieb OMD John Lewis & Partners and Waitrose & Partners
MediaCom UK Tesco

Best small budget use of TV

How Italy's 'King of Tortellini' won the hearts of UK Northerners, Total Media for La Famiglia Rana

SHORTLIST

december19 allplants
Republic of Media Scottish Government

Best ongoing use of TV

How TV became the fuel for our journey, Once Upon A Time Media for Greater Anglia

HIGHLY COMMENDED

OMD UK easyJet

SHORTLIST

Arena Media Domino's
UM Manchester Aldi

Best TV newcomer

Claiming our unfair share of attention, Craft Media & Goodstuff for BrewDog

SHORTLIST

PHD Manchester & AMV BBDO The Stroke Association
PitPat & UKTV Ventures PitPat

Young TV Planner of the Year

Charlotte Knope from Running Total

SHORTLIST

Aimee Sheehan, Wavemaker UK
Gabriella Michalski, Manning Gottlieb OMD
George Viner, MediaCom UK
Ian Daly, the7stars (now at Bountiful Cow)
Jamie Callaghan, OMD UK

Special award: Best collaboration

Delivering a TV first with Channel 4, ITV and Sky, MediaCom UK for Tesco

Special award: Advanced TV planning

Domino's + TV = A Treat Night In, Arena Media for Domino's

Inspiring insights

Celebrity Juice, ITV2

Making econometrics free to all

The Demand Generation and Demand Generator project is probably the most ambitious Thinkbox initiative in our 16-year history. It is the first freely available industry planning tool that puts meaningful econometric data in the hands of advertisers of all shapes and sizes. And soon we're expanding what it can do.

Advertisers who use econometrics see how media have powerful indirect effects, and invest accordingly. But many can't afford econometrics and depend on short-term, easily accessible data, which encourages over-investment into channels most obviously linked to sales. Media like TV, print and radio miss out.

Our Demand Generation research addressed this and made rigorous econometrics available to all for free. It built the Demand Generator, a unique online tool that determines the optimal media mix specific to a brand's category, budgets and goals.

Smarter media planning
Demand Generation identified the key variables that influence advertising effectiveness. They are a brand's category, budget, size, appeal, proportion of online sales, and desire to minimise risk. Its key findings included proving that while most channels boost the efficiency of others, the scale and consistency differ significantly, and that some forms of advertising are far riskier than others – linear TV advertising and broadcaster VOD were found to be the least risky.

Based on these findings, the Demand Generator optimisation tool enables individual brands to:
— Determine the optimal media mix for their specific business
— Generate 'what if' scenarios for varying budgets over three years
— Understand the impact of different budgets on immediate returns and longer-term base level sales
— Determine the value of individual channels and resulting trade-off relative to creative costs
— De-risk their media mix to achieve a more certain return.

“
Demand Generation is a neutral planning tool based on real business results, which enables us to reinforce our planning position with our clients.
”

Lee Baring
Head of Agency Trading, VCCP Media

You can find the Demand Generator here

Summer 2021 data refresh
The Demand Generator is only as good as the data behind it, so we're bringing that as bang up to date and relevant as possible with the following updates:
— Including the latest pre-2020 econometric models in the database
— Adding Telecoms to the existing suite of categories
— Breaking the current FMCG category into food and non-food sub-categories
— Breaking the current Finance category into insurance, current accounts, mortgages, and other
— Breaking the current Retail category into food grocery and non-food
— Updating media pricing to give users the option for 2019 prices or WPP-predicted 2021 pricing
— Enabling users to define campaigns as either brand or activation

Demand Generation methodology
Demand Generation was a meta-analysis of econometric models conducted by WPP's MediaCom, Wavemaker and Gain Theory. It was huge, analysing £1.4bn of media spend by 50 brands across 10 forms of advertising over three years. And it analysed six different categories: FMCG, finance, retail, online retail, automotive, and travel.

This was the first time WPP had collaborated through pooling their respective econometric databanks. It required permission from all 50 brands in the study, a huge undertaking.

The study also analysed channel risk and channel variability, based on the variance of ROI within the middle 50% of all campaigns analysed (i.e. it excluded the worst performing and best performing 25%).

This approach ensured we had credible, neutral data with immense scale that would be recognised as unbiased. Such is the curse of research commissioned by a media-specific trade body.

Some channels massively boost the effects of others

Channel benefiting from the effect

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

Legend: 0-2% | 3-4% | 5-8% | 9-20% | 20%+

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

The variability of returns differs significantly across channels

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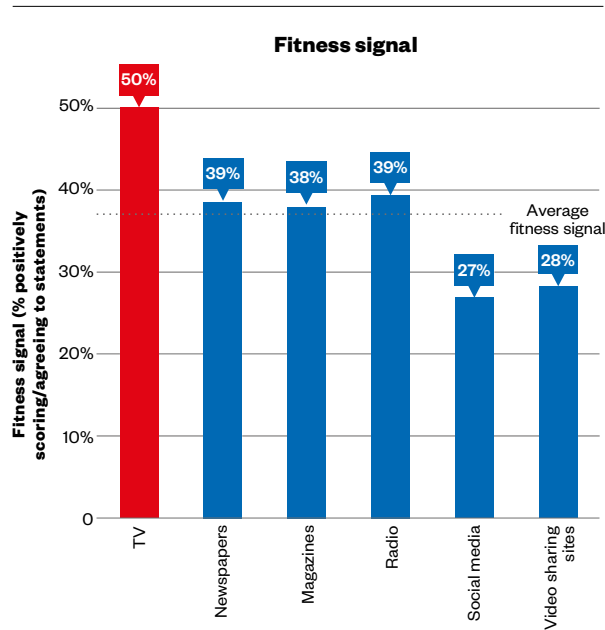

The variability of returns by channel
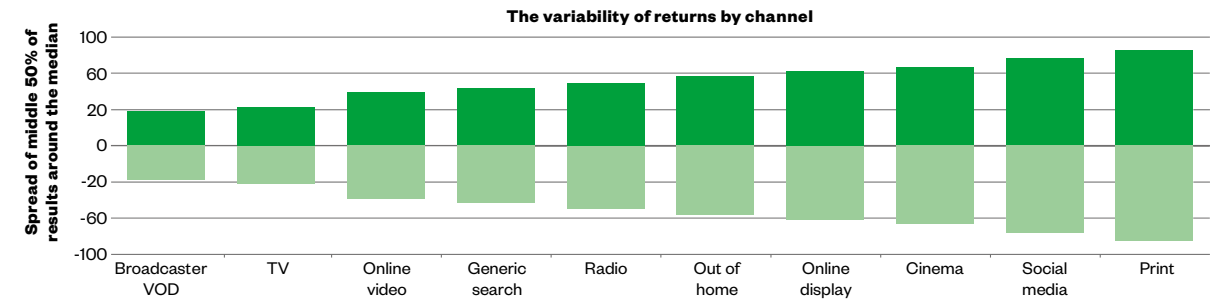
Source: 'Demand Generation', Nov 2019, MediaCom/Wavemaker/Gain Theory
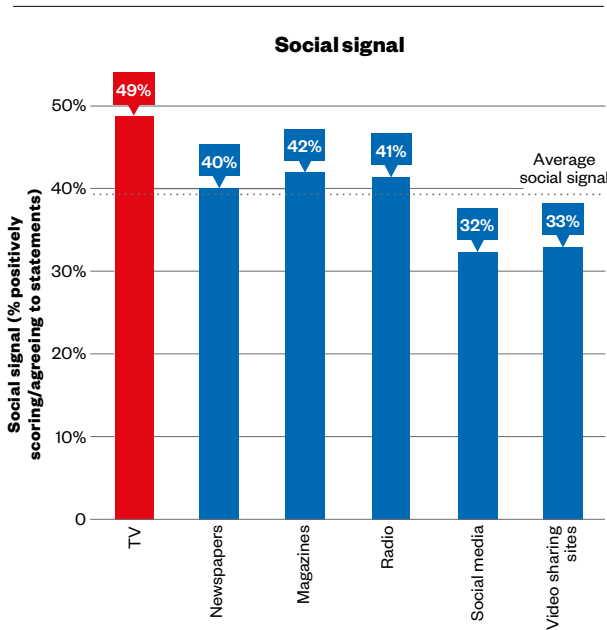
What does advertising on TV say about a brand?

Signalling Success, by house51, is the first known UK research dedicated to the behavioural science principle of media 'signalling' – how the perceived cost and scale of advertising channels can enhance brand attributes in the eyes of the consumer.

TV drives the strongest fitness & social signals

Fitness signal

Fitness signal

Channel	%
TV	50%
Newspapers	39%
Magazines	38%
Radio	39%
Social media	27%
Video sharing sites	28%

Average fitness signal

Fitness signal (% positively scoring/agreeing to statements)

Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

Social signal

Social signal

Channel	%
TV	49%
Newspapers	40%
Magazines	42%
Radio	41%
Social media	32%
Video sharing sites	33%

Average social signal

Social signal (% positively scoring/agreeing to statements)

Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

You can take a look at the full research analysis and download the charts here

Key findings

1. Advertising drives 'fitness' and 'social' signals.
Fitness signals are about financial strength, product confidence and quality. Social signals are about fame, popularity and success. Both are valuable signals but the ability of media to convey those signals varies greatly.

2. TV drove the strongest fitness and social signals in all product categories tested and outperformed social media and online video across every category.
The relative performance across each media varied little by category with TV driving the strongest signals for online retail, FMCG, mobile networks and home insurance.
Social media and video sharing sites were the advertising channels least likely to drive these signals across the categories tested.
TV delivered stronger fitness and social signals for all age groups, including younger audiences.

3. Brands which advertised on TV were significantly more likely to be perceived as financially strong, high quality and confident

TV advertising's ability to drive the above fitness signals outperformed all other media tested. (36% stronger than the average.)
Half of all respondents rated brands that advertised on TV as financially strong.

4. TV advertising helped brands convey popularity and success more than any other medium.
TV was 23% stronger than average in delivering social signals.
Half of all respondents rated TV advertising as demonstrating that lots of people were buying the brand.

5. Brands advertising on TV, magazines and radio are perceived as most trusted to deliver on promises made
A third (30%) trusted TV advertising to deliver on the promises made, making TV the most trustworthy medium, just ahead of magazines (29%) and radio (28%).
Advertising on video sharing sites was least likely to deliver brand trust at 19%.

Big Zuu's Big Eats, Dave

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↑ Des, ITV
→ Grayson's Art Club, Channel 4
← Little Birds, Sky Atlantic

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