

**The green screen**

Find out how the TV industry is tackling the challenge of sustainability **p.04**

**Views on viewing**

The latest trends, stats and facts in TV and video viewing **p.22**

**Making a connection**

How broadcasters are reaching younger viewers **p.25**

# A year in TV

Thinkbox Annual Review 2021-22



# 2021 at a glance



**1,286**

There were a whopping **1,286** new or returning TV advertisers in 2021

The average person watched **2 hours, 57 minutes** of broadcaster TV a day

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

**87%**

**Broadcaster TV** accounts for **87%** of our video advertising day

**65%** of adults watch **50+** linear TV ads a week

**Online businesses** remained the biggest category of advertisers on TV in 2021



- Oprah with Meghan and Harry, ITV
- UEFA Euro 2020, ITV
- 'This Christmas Nothing's Stopping Us', Tesco



“Unless you land two or three points that explain your product, you’re not really going to get people to come to the website with the right level of intent in the first place. And it’s hard to deliver those three messages outside of TV.”

**Lucas Bergmans**  
Group Brand Director, Cazoo

Read more on how TV is the perfect medium for brands to educate consumers and drive website visits simultaneously p.62

## CFlight takes to the skies

CFlight, the first linear TV and BVOD measurement system in the world, reveals first insights via the IPA's Television Research Advisory Group (TRAG)



### And the gong went to...

**Nationwide Voices** won the Thinkbox TV Planning Awards Grand Prix 2021

- Friends: The Reunion, Sky One
- Rose & Giovanni, Strictly Come Dancing, BBC One



### Ad Net Zero gains momentum

Ad Net Zero Global Summit took place during COP26

**28,172 hrs**

Total hours of training delivered by TV Masters in 2021



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## Welcome

From Lindsey Clay



TV advertising had a remarkable 2021 and there is plenty to celebrate as it continues to bounce back from the effects of the pandemic.

That said, very few people are currently feeling celebratory about anything given the horrors unfolding in the world and the uncertainty about what is yet to come.

Nonetheless, in this publication, we've done our best to unpick, unpack, and contextualise what is happening in TV and TV advertising to help you understand how to keep getting the best out of it.

From new battles emerging in the video world and the implications for planning, to the work the TV industry is doing on sustainability, the case for commercial creativity, how broadcasters are attracting younger viewers, and our pioneering study with Magic Numbers giving online businesses a playbook for TV – as ever in this annual review, we cover a lot of terrain. Something for everyone, I hope.

I'd like to thank all those who have contributed their clever thinking to this, and, of course, thank Thinkbox's shareholders for their continued investment and support. And I'd like to wish everyone a hopeful and peaceful future.

Lindsey Clay CEO, Thinkbox



# The green screen

Thinkbox is committed to operating sustainably ourselves, using our influence and platforms to encourage sustainability in others, and supporting the use of advertising, especially TV advertising, to change society's behaviour for the better. The TV industry as a whole has made huge strides in this area, embedding sustainability at the heart of everything it does.



📍 Judi Dench's Wild Borneo Adventure, ITV

## We're in this together

You've heard it countless times, but it bears repeating: there's no more important issue on earth than sustainability. You know this. You've probably adapted your behaviour to help and urged others to do so too. If you haven't, you really should.

We are truly all in this together, and the TV industry is no different. In fact, it has an important role to play – not just in getting its own houses in order, but in using its cultural influence to encourage society to do more. TV – both its programmes and advertising – normalises things. TV shifts perceptions and attitudes. It has a long history of being a force for social good and is a powerful weapon in the fight against climate change.

## TV is committed to change

From Sky Zero to Channel 4's Sustainability Roadmap, ITV's Climate Action plan, or UKTV's Green Team, the commercial broadcasters all have wide-ranging initiatives to tackle environmental sustainability. It is a fundamental part of all their corporate strategies and they are holding themselves accountable for their progress.

You can read about the broadcasters' strategies and their individual targets in detail on their websites, but they coalesce around some very clear principles: embed best practice into working culture; have all staff trained in carbon literacy; reduce or eliminate carbon in operations and behaviours; offset carbon emissions.

## Ad Net Zero

All the TV broadcasters – and Thinkbox – are supporters of Ad Net Zero and its central commitment to become net zero carbon organisations by 2030. Ad Net Zero is the advertising industry's drive to reduce the carbon impact of developing, producing and running advertising, and over the page you can read an article by Sebastian Munden, EVP & General Manager, Unilever UK & Ireland, and Chair of Ad Net Zero, on the great work this initiative has already done.

All the UK's broadcasters are committed to becoming net zero carbon organisations by 2030.

## Sustainable TV production

The albert initiative was founded in 2011 by the TV and film industries to tackle their environmental impact and encourage their audiences to act for a sustainable future. All the commercial broadcasters have worked hard to dramatically reduce the carbon emissions of their productions, if not made it mandatory for all new productions to be carbon neutral.

## Climate Content Pledge

At COP26 last year, through albert, all the UK's commercial broadcasters were among the 12 broadcasters and streamers from the UK and Ireland that pledged to show even more climate content on screen, regardless of the genre.

This ground-breaking pledge is about harnessing the power of TV to influence and inspire society's behaviour – and not just doing it in obvious places like natural history shows. From soaps to comedies to quiz shows to dramas, climate storytelling will figure larger than ever before.

📍 Here We Flo, winner of the Sky Zero Footprint Fund







“Let's not waste our wonderful world” by Hell Yeah! for Olio

# Powering advertising's drive to net zero operations

**Sebastian Munden,**  
EVP & General Manager, Unilever  
UK & Ireland, and Chair, Ad Net Zero



2021, and COP26 in particular, showed that the climate emergency is real and needs action now. The public and corporate desire for rapid change will grow this decade and the advertising industry sits right at the centre of this critical shift in the way we live our lives.

Thanks to the hard work of the Advertising Association, the IPA and ISBA, we have a world-leading response in Ad Net Zero to achieve net zero emissions from the development, production and media placement of advertising by the end of 2030.

We count nearly 100 supporters from across the advertising landscape, including advertisers, agencies, tech companies, and media owners with brilliant backing from Thinkbox and broadcasters, Channel 4, CNN, ITV, Sky and STV.

This support in our first year helped us publish the Ad Net Zero Guide, launch the AdGreen Carbon Calculator, aid the development of the IPA Media carbon calculator and unveil the first training qualification for best practice in sustainable ad operations, the Ad Net Zero Essentials Certificate. We also marked our first anniversary with the Ad Net Zero Global Summit at STV, opposite COP26.

But why are net zero ad operations so important to us at Unilever? Our goal is to reach net zero emissions from our value chain by 2039. This means we must radically reduce the greenhouse gas (GHG) impact of our products at every opportunity – from raw materials and manufacturing, to how we advertise and get our products to consumers. It's an ambitious target and can only be achieved through collaboration between companies, suppliers, investors and policymakers. Ad Net Zero is a prime example

of what can be achieved when the value chain comes together.

“**Our goal is to reach net zero emissions from our value chain by 2039. This means we must radically reduce the greenhouse gas (GHG) impact of our products at every opportunity – from raw materials and manufacturing, to how we advertise and get our products to consumers.**”

Ad Net Zero is a 10-year plan – we must keep driving forward. This year, we will introduce certification for Ad Net Zero supporters: the next step in ensuring companies reduce carbon emissions from every part of advertising's operations.

The TV industry is well set to support us here. We have learned from BAFTA's brilliant work on sustainability in film and TV, adapting Albert to provide the backbone of AdGreen's carbon calculator for ad production. At the time of writing, it has the support of over 300 agencies and production companies, with an average of 4-5 campaigns being added per weekday, measuring carbon footprints, and taking active steps to reduce them.

We need that same drive for change to tackle carbon from media distribution; TV companies

will play a critical role in providing data to support the tracking in the likes of the IPA's media carbon calculator so we, as advertisers, can account for the carbon involved in our campaigns.

Yet the role of TV companies goes further still. We must use advertising to positively influence consumer behaviour and I know TV is a fantastic medium to do this. There are inspiring ads being made every day showcasing the changes – from small to large – and you can actively help consumers shift to more sustainable products and lifestyles.

I ask every one of you to help us deliver our ambition and, if you want to get directly involved, please contact the Ad Net Zero team at the Advertising Association.







# State of the TV nation



# TV bounces back

TV came back stronger in 2021 than anyone predicted – surpassing pre-pandemic investment levels – and there are many factors driving its return to growth. Here we look at the key numbers and explore why TV advertising is resurgent.

**£1 billion more invested in TV advertising in 2021**

This took it to a total of £5.46 billion, up 24% on 2020 (and up 11% on pre-pandemic 2019), and represents a record level of investment in TV advertising. The previous high of £5.28 billion was in 2016.

The total, based on figures provided by the UK's commercial broadcasters, includes all investment in all forms of TV advertising, linear and on demand. It marks a remarkable surge in confidence in the effectiveness of TV advertising.

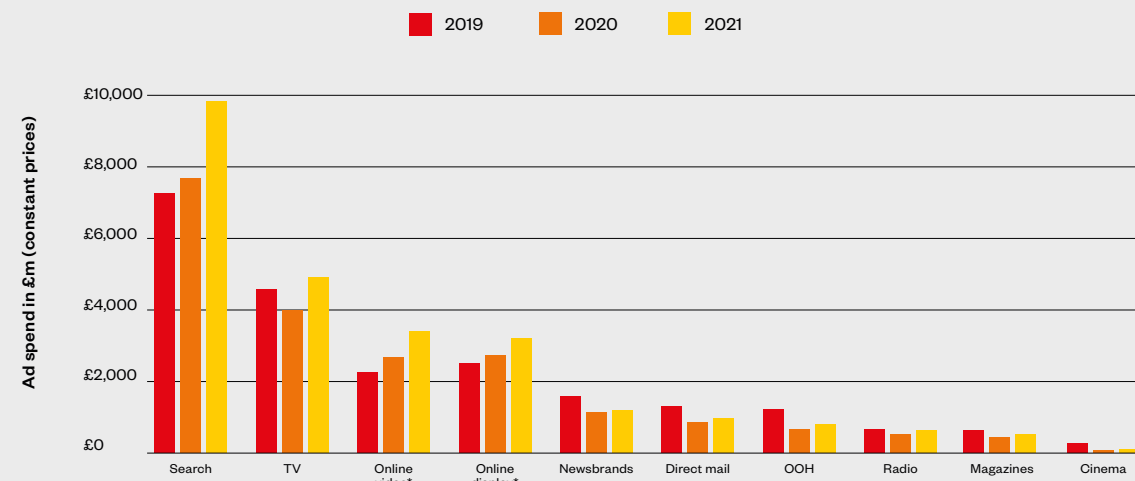
## Summary:

TV advertising investment in the UK totalled £5.46 billion in 2021, up 24%, making it a record year

Online-born businesses invested £1.12 billion in TV, an increase of 42%

1,286 new advertisers on TV in 2021, up 53% on the pre-pandemic average

TV is among the channels that have recovered well



Source: AA/WARC \*Online excludes digital forms of TV, Print & Radio

**TV wasn't alone in returning to form**

As the chart (left page) shows, TV was one of a number of forms of advertising that performed well in 2021.

Online search was worth almost £10 billion in 2021, according to data from Advertising Association/WARC. Search spend almost perfectly correlates with e-commerce: the more money spent online, the more advertisers need to spend on the digital equivalent of high-street real estate.

So the pandemic-led boom in online shopping unsurprisingly accelerated the volume of investment in search advertising, although one could argue it's not really advertising as such, more point-of-sale activity targeting the demand generated by advertising.

Other types of advertising that bounced back well in 2021 were online video like YouTube and TikTok and online display, which is dominated by spend on social media platforms.

**TV benefited from being more pandemic-proof**

There's no question that TV, online video and online display were fortunate that their ability to deliver advertising was heightened during the pandemic. They all benefited from the continued pandemic-induced constraints on some other forms of advertising, notably out-of-home and cinema, where 2021 spend levels remained below 2019.

In 2021, according to Advertising Association/WARC figures (current prices), cinema advertising investment was up 70% year-on-year but remained down 69% compared with 2019. Out-of-home advertising was up 25% year-on-year in 2021 but down 33% on 2019. We'll hopefully see a much stronger 2022 for out-of-home and cinema.



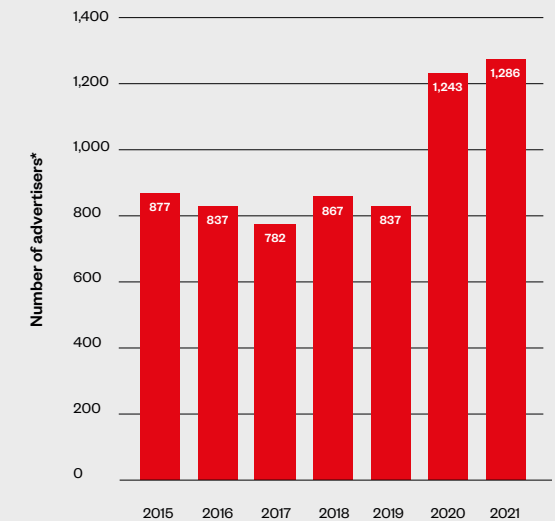
**1,286 new advertisers on TV in 2021**

In 2021, 1,286 advertisers used TV for the first time, or returned after 5+ years away. This follows on from 1,243 new TV advertisers in 2020.

Between 2015-2019, the average number of new-to-TV advertisers a year was 840. The dramatic increase in the last two years (up 53% on the pre-pandemic average) demonstrates the increasing appeal of TV advertising to businesses of all shapes and sizes.

Verisure, the alarm system company, was the biggest new-to-TV advertiser, investing £10.9 million in 2021, according to Nielsen. Other notable new-to-TV advertisers include Boomin (online property search), which invested £8.4 million in TV; DeLonghi (home appliances), which spent £3.2 million; and Mowi (seafood), which spent £2.5 million.

The surge in new-to-TV advertisers



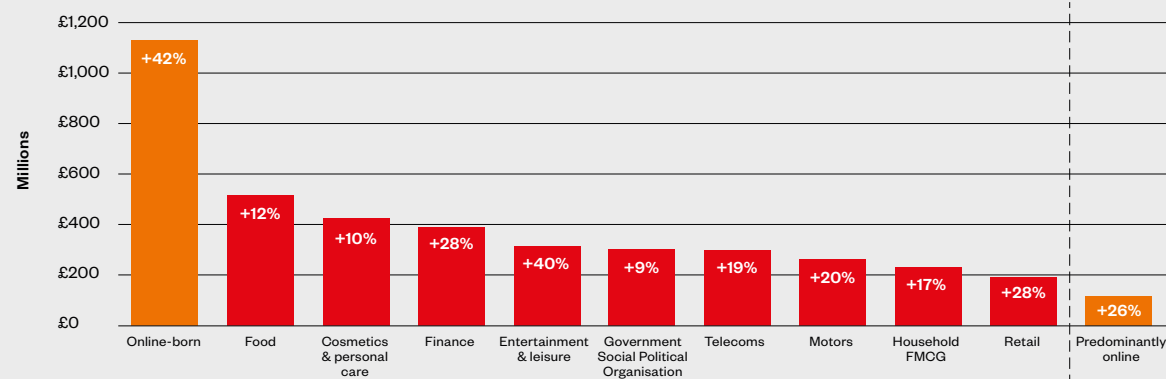
Source: Nielsen Ad Intel/Sky - \*New to TV advertisers classed as those not advertising on TV within the last 5 years on Linear TV and Sky AdSmart.

**53%**

New-to-TV advertisers up 53% on the pre-pandemic average



Online-born businesses account for 20% of all linear TV spend



Source: Nielsen Ad Intel, 2021 'Online Born' and 'Predominantly Online' are Thinkbox-created categories which consist of all online-only brands and online services from bricks and mortar businesses (YoY category % change vs 2020)

# 42%

Online-born businesses increased TV investment by 42%

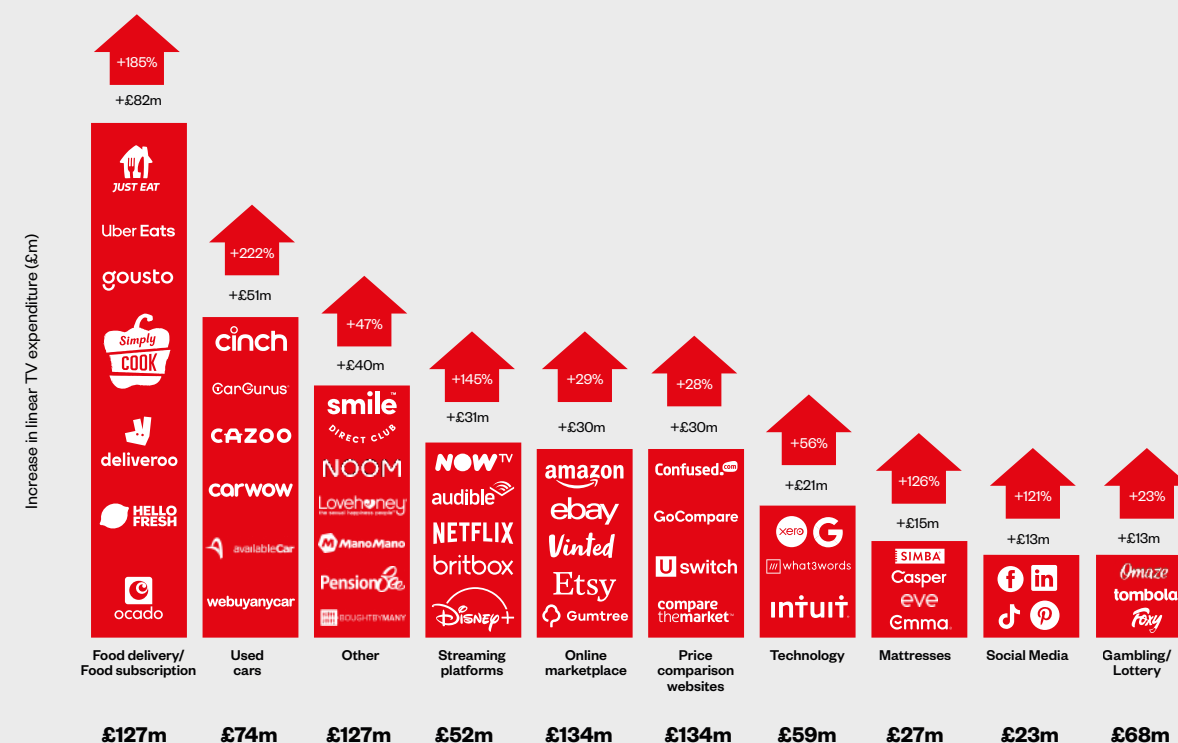
All major advertising categories increased their TV investment in 2021, but the largest increase came from 'online-born businesses' – businesses that began online, with no prior bricks and mortar presence. This trend was driven by the pandemic-led boom in e-commerce coupled with TV's ability to drive immediate growth in web traffic and long-term brand fame.

According to data from Nielsen, which measures linear TV advertising spend, these businesses invested £1.12 billion in TV advertising in 2021, an additional £335 million compared with 2020, up 42%. They represented 20% of all linear TV advertising spend.



© The Last Leg, Channel 4

TV is experiencing a surge in spend from 'online-born' businesses



Jan to Dec 2021 total linear TV spend (compared to 2019 spend)

Source: Nielsen Ad Intel, Thinkbox-created category of online-born businesses. Brands shown are not the exhaustive list, but account for the majority of spend

Stalwarts and start-ups investing in TV

This surge in spend from online-born businesses comes from a diverse selection of business sectors. Some are long-established TV spenders, such as the comparison sites, but others are brand-new market propositions, such as the online used car retailers.

Online-born businesses using TV has been a feature of advertising investment in recent years. But what we saw last year – in fact over the last two years – is a dramatic shift in momentum, a tipping point. We've seen more businesses in more categories acting with more confidence.

And we're not just seeing toes being dipped into TV's waters. Even at launch, many have been diving in at scale with major investments. This is significant not least because so many online-born businesses are backed by venture capital – investors known for tight control over expenditure. That they are devoting sizeable budgets to TV demonstrates they buy into what TV delivers.

The roles TV plays for online-born businesses

Online-born businesses need to use TV as a shop window for their products and services. A TV advert is the perfect marketing vehicle for a business to articulate what their service or product is and why you should use it.

They also benefit from TV's signalling strengths (the 'as-seen-on-TV' effect) which convey trust, quality and credibility – attributes that are vital to the virtual.

And the relaxation of booking deadlines for TV has undoubtedly helped, too. But, above all, online-born businesses enjoy TV's traffic-driving ability, something they experience in real time and can easily observe through Google Analytics.

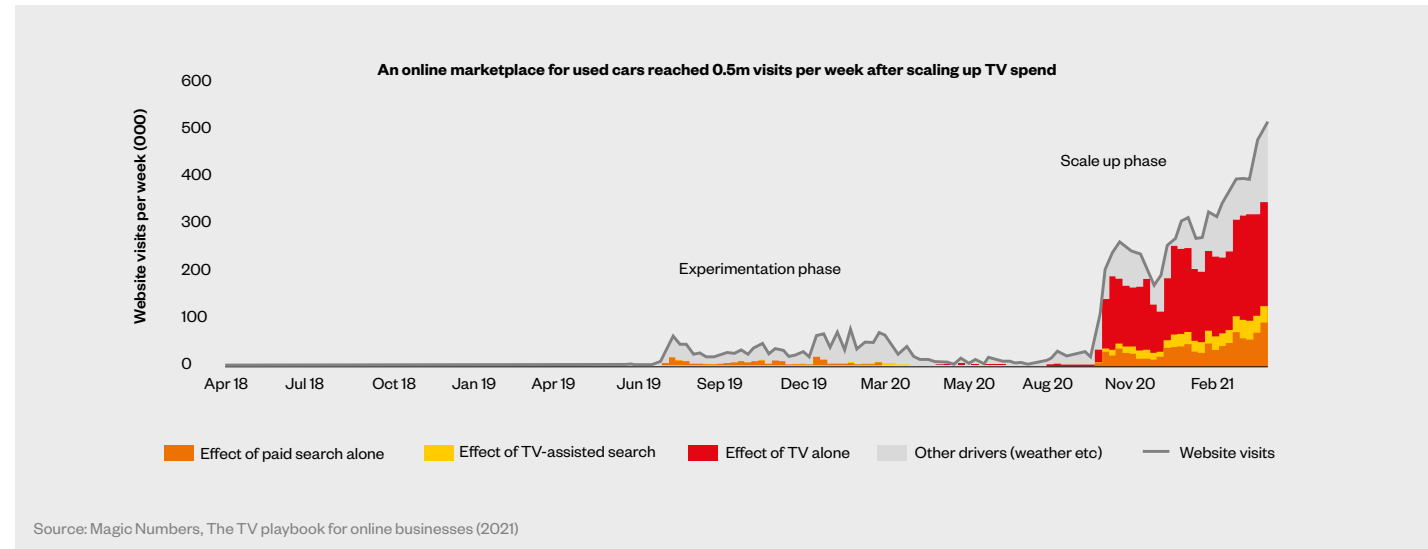
But beyond this, TV advertising delivers against crucial marketing objectives....



**TV is a crucial means of scaling quickly**

The broad reach of TV enables businesses to scale quickly. The chart below breaks down the driving forces for this online second-hand car dealership – taken from our study with Magic Numbers.

Following a small-scale test to establish the case for TV, this brand then significantly increased its TV investment in late 2020 and early 2021. The result was scaling to 500,000 weekly visitors in just a few months – with econometric analysis showing that the TV advertising drove the bulk of the traffic.



**TV drives brand search**

Part of the power of TV advertising is that it delivers advertising messages that stick in our memory.

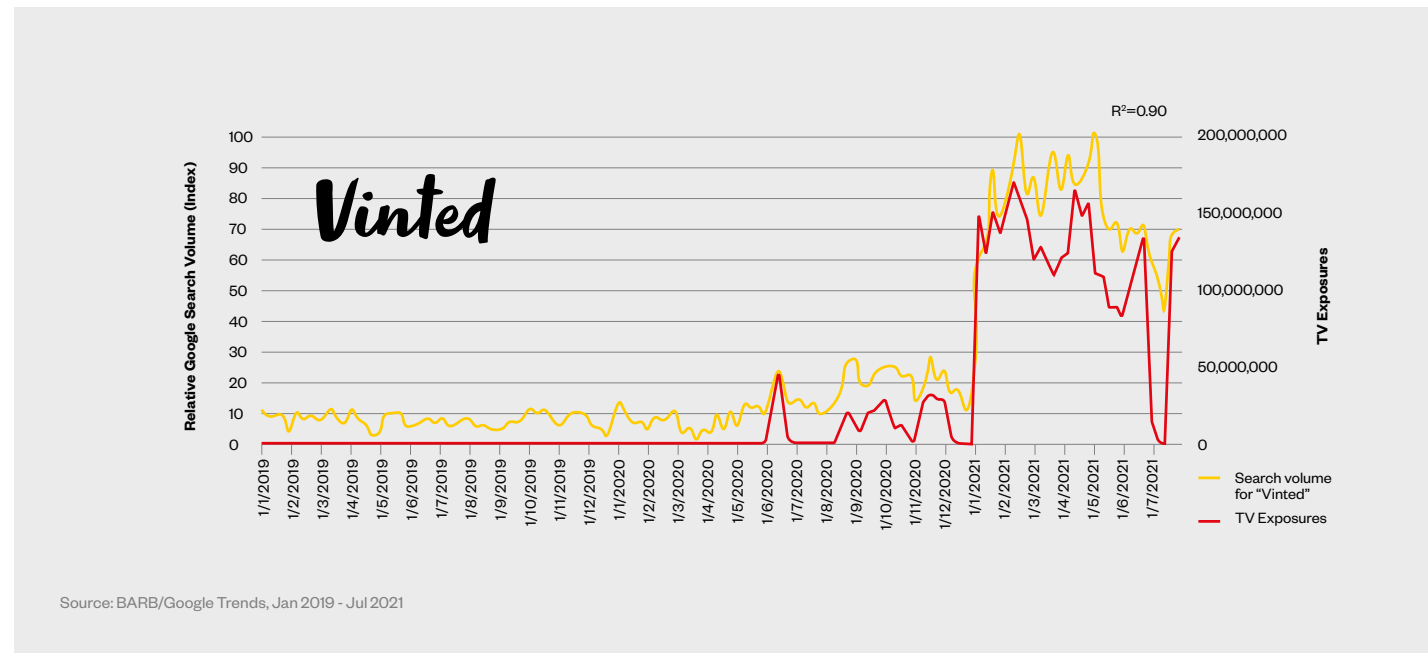
To marketers used to being able to directly track the effect of their advertising, through return path data, the idea of investing in advertising without this direct link can be, understandably, quite terrifying.

But this is actually part of the magic in how TV works.

There is an obvious relationship between a brand's TV activity and the volume of people searching for its brand name – see chart below for an example, in this case for Vinted.

These aren't people who liked a picture and clicked on it in the moment. These are people who, when they were actually in market for pre-loved clothes, thought of Vinted and typed it into the search bar.

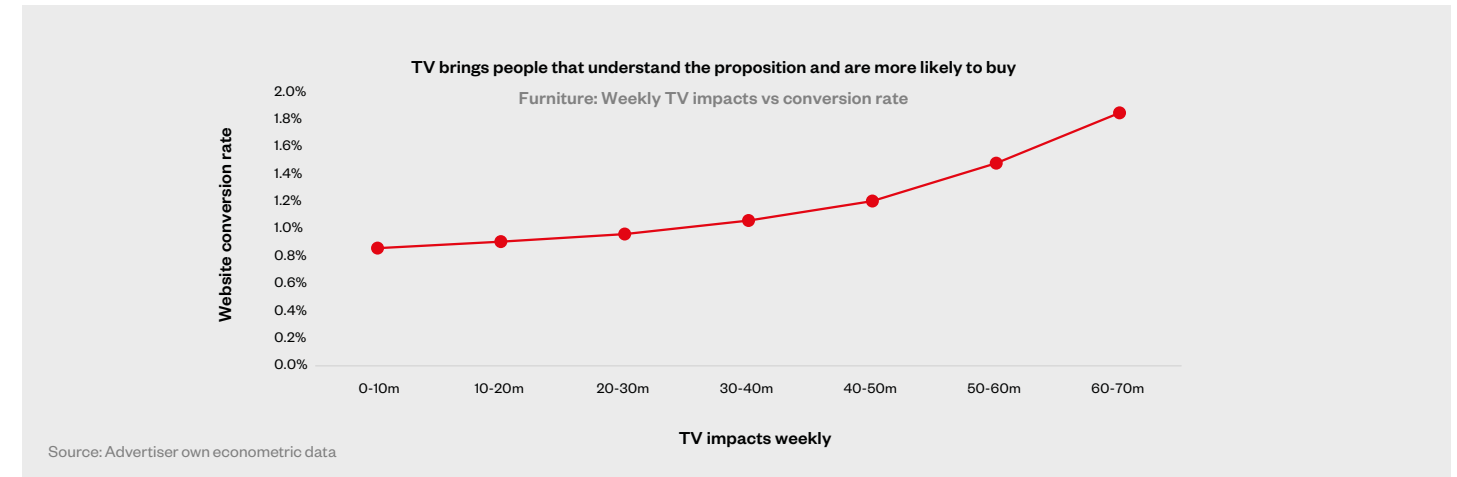
The brand was in their memory.



**Priming through TV improves conversion**

It doesn't stop there. The data in the chart below, kindly donated from a friendly advertiser in the furniture sector, shows an econometric analysis that revealed how conversion improves as TV spend increases.

So, not only is TV generating higher volumes of traffic, but it is also generating an increase in the likelihood that when someone comes to your site they'll actually buy something.



# Advanced TV is here

Advanced advertising is making TV more flexible and a more attractive investment for a wider range of businesses.

With access to first-party data, customised audiences, geo-targeting, data matching and simplified buying approaches, advanced TV has opened the door for businesses of all shapes and sizes. Recent innovations include:

**All4 Private Marketplace**

Channel 4's partnerships with The Trade Desk and Freewheel, and integration with Google's DV360, enable it to offer brands complete flexibility via programmatic auction to advertise around high-quality content on All 4.

**Planet V**

ITV's addressable advertising platform, Planet V, recently announced the launch of a new functionality that automates the delivery of ad creatives that are tailored to specific locations. And there are more developments to come with the launch of ITVX later in the year.

**Sky AdSmart**

One of the most established advanced advertising solutions, Sky's Ad Smart can now run addressable sponsorship creative. For example, Volvo, long-running sponsors of Sky Atlantic, can now tailor which vehicle is used in their idents based on the household make-up of the home being targeted.



© The Cabins, ITV



# New battles in video

Important trends emerged in 2021 that help explain how the video world is evolving. Let's look at them so that we can better understand what's happening...

## Summary:

There are now two battles in video: one in professionally produced TV, another in social video

TikTok's growth is at YouTube's expense

The TV set is the home to high-quality, professionally produced TV content

Broadcaster TV accounts for 87% of the video advertising day

With so many quality, creative and contextual considerations in video, we need great planners like never before

### 5 hours, 5 minutes of video a day

That's how much we watched in 2021. It is a little less than lockdown-peppered and COVID-restrained 2020, when it was 5 hours, 17 mins a day. But it remains up 11% compared with 2019, when it was 4 hours, 35 minutes.

### Video growth is TikTok-related

In 2021, overall viewing to TV content dropped by 7%. However online video viewing grew by 8%, and at the heart of this was the popularity of TikTok, which more than doubled its average daily viewing time from 13 minutes per person in 2020 to 27 minutes in 2021. It didn't even exist a short while ago.

And as TikTok grew, something interesting and perhaps a bit unexpected happened: YouTube, which has previously grown in viewing time every single year, dropped back by 4%. It appears that TikTok is growing at the expense of YouTube.

### There are two battles in video

What seems clear from the data is that there are now two distinct battles in video. One is within the environment of professionally produced TV content, and it's between the broadcasters and the SVOD players. The other is within the social video environment and is a tussle between YouTube and TikTok.

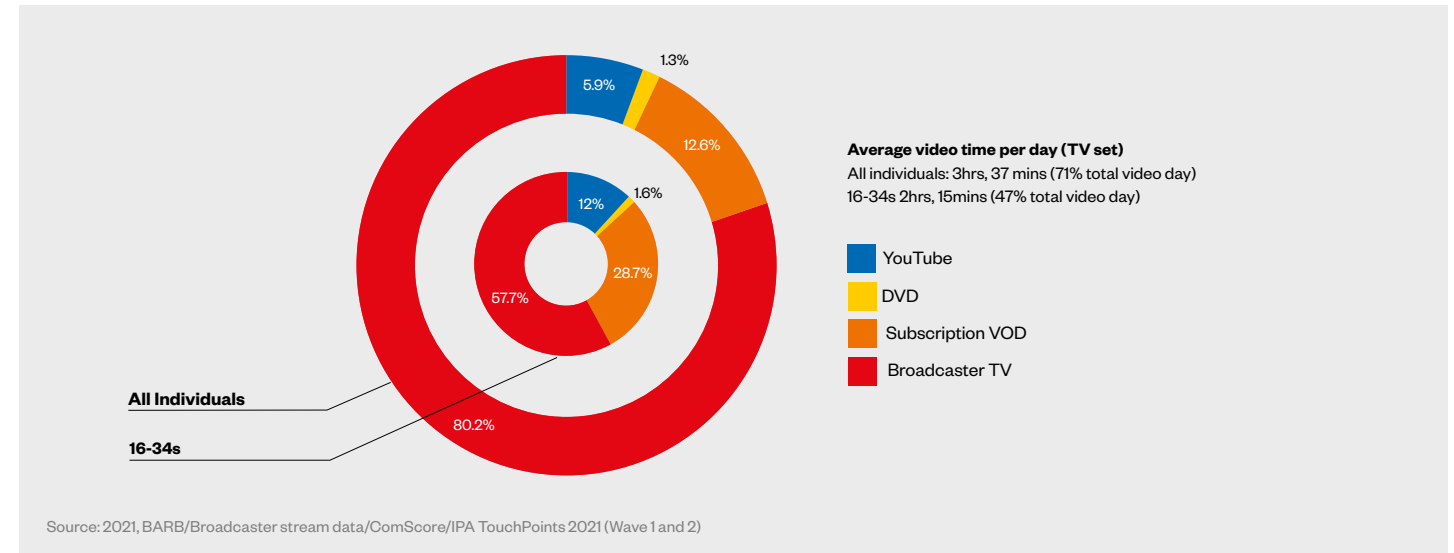
And these two battles are not just defined by content type, they're also occurring in different arenas. The first is taking place on the TV set and the other on devices, PCs, laptops, mobile phones and tablets. Let's look at them in turn...

### TV is watched on the TV set

If you look at the chart below, the TV set is clearly the home for high-quality, professionally produced video content. Approximately \$100 billion is spent on this content by the

US Networks, the SVOD players, and the UK broadcasters combined. Viewers are enjoying the ultimate viewing experience and the competition is fierce.

### The TV set is the competitive arena for high-quality AV content



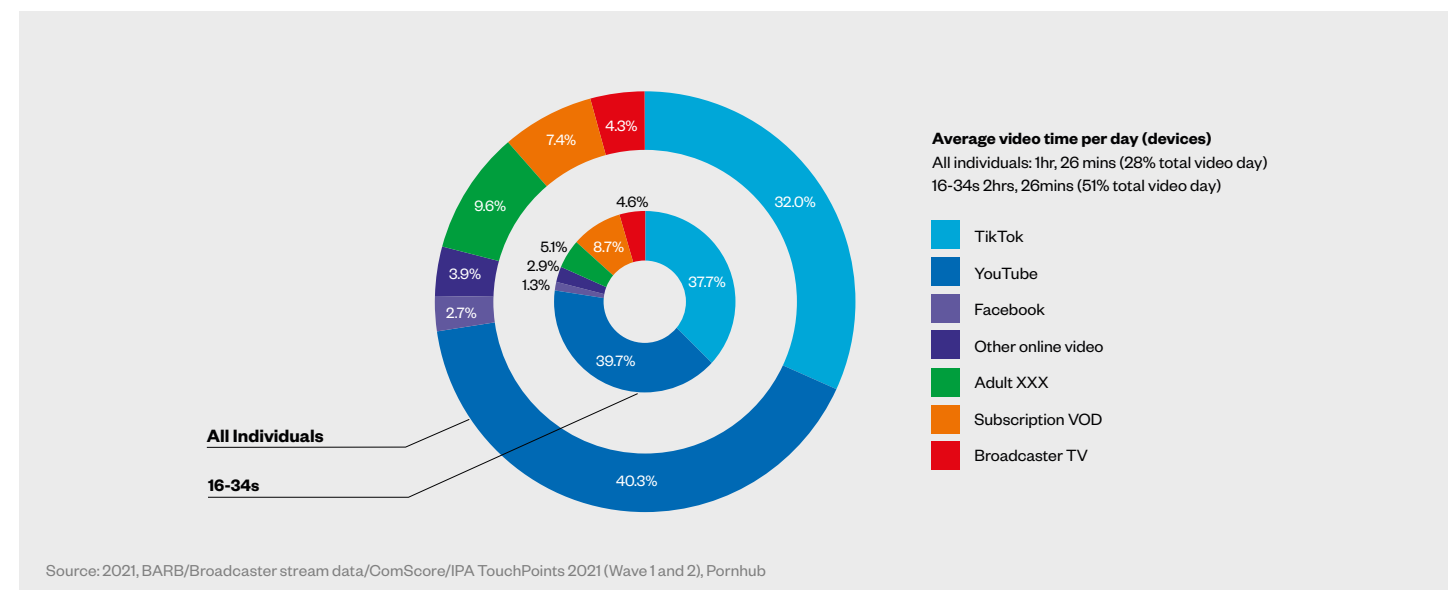
### Social video is device-based

Devices are the competitive arena for the social video struggle between YouTube and TikTok, although some YouTube viewing does take place on the TV set.

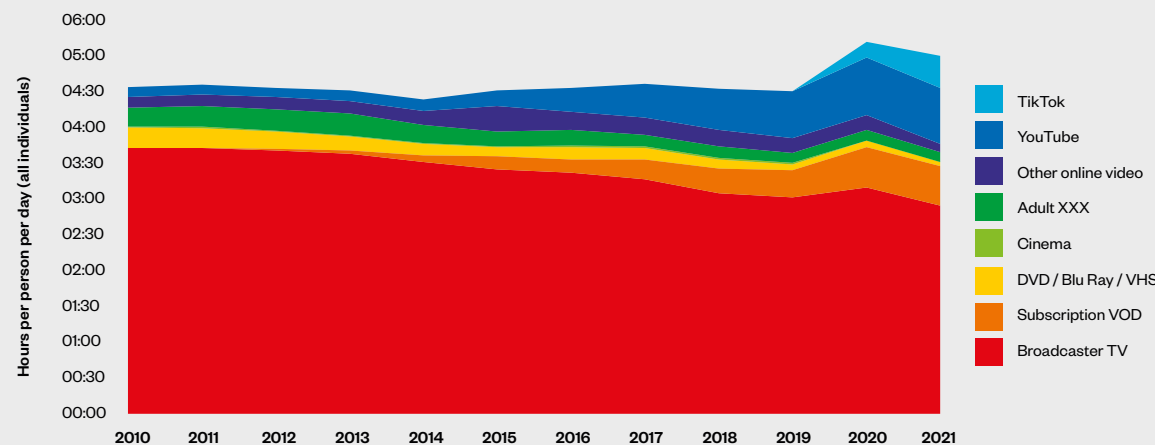
Together, TikTok and YouTube command over two thirds of all device-based video viewing – with mobile phones by far the most common way of watching this content. BARB data suggests that the mobile phone accounts for almost all TikTok viewing.

Broadcaster TV content is also viewed on devices, and some shows like Love Island, that particularly skew towards younger viewers, can have very high volumes of device viewing. But this is the exception to the rule; broadcaster TV is a minority part of our device-based video viewing.

### Devices are the competitive arena for social video



### How video viewing breaks down





# 87%

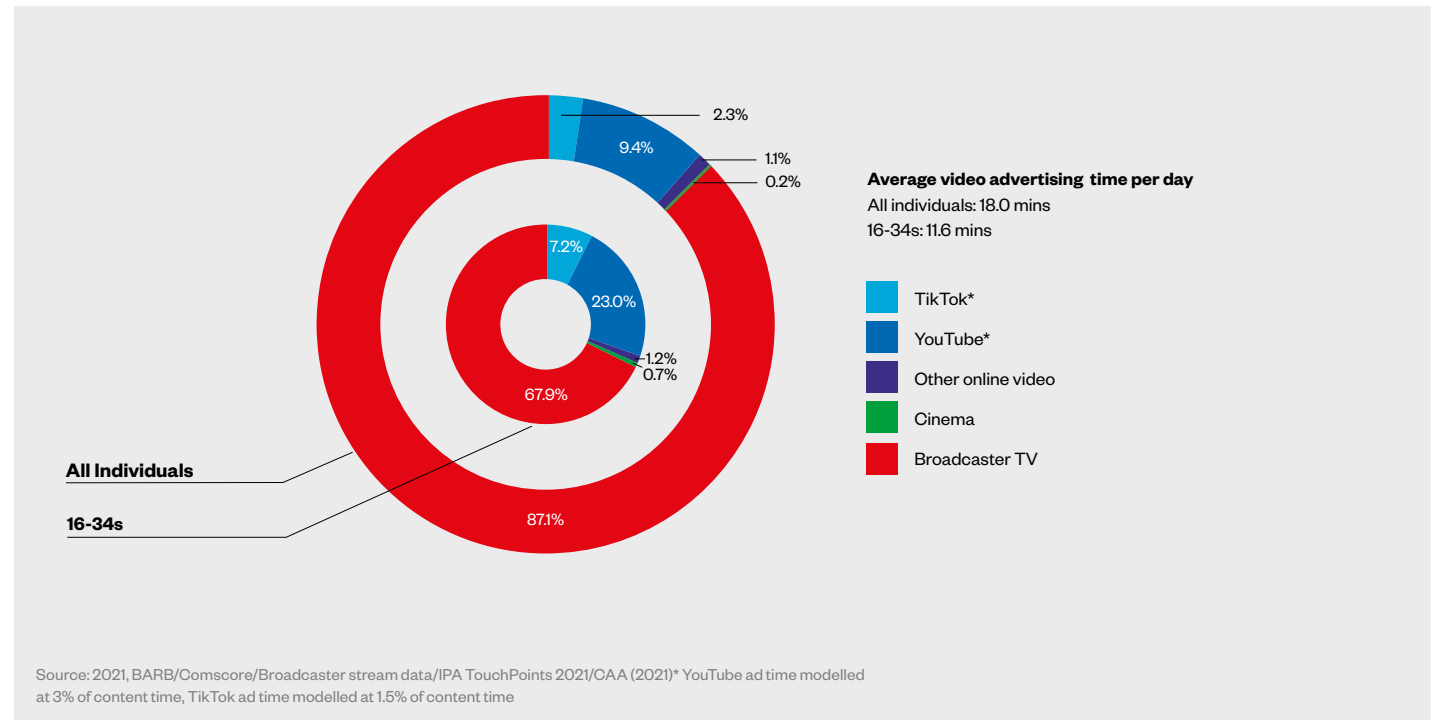
Broadcaster TV is 87% of video advertising.

If we couple device and TV set viewing together and look at it in terms of advertising, we can see how much each video type contributes to our total video advertising time.

Broadcaster TV continues to take the lion's share, 87% for all Individuals and 68% for 16-34s.

YouTube and TikTok are the only other significant players in video advertising and, together with TV, these three platforms account for 99% of ad exposure time.

But that's just quantity, which is a useful but blunt measurement. Time spent with a medium is only a starting point. To make decisions about advertising, you need to factor in a lot more.



### The AV planning challenge

TV and social video are obvious bedfellows from a planner's perspective; there's an undeniable complementarity between them from a demographic point of view. But they're a nightmare to plan in a unified way as the video ad formats and environments are so different.

There are so many quality issues to consider in planning, so many creative and contextual considerations. TikTok ads are easily swiped away. YouTube ads can be skippable – or not. And there continue to be content suitability concerns that, depending on your safe-listing approach, can severely limit the reach potential – and can even make AV planning a moral challenge.

Great planners that take into account all the variables, factoring for ad skipping, screen size, attention, brand safety, costly signals, multiplier effects and so on, are more essential than they've ever been.



© Lie With Me, Channel 5

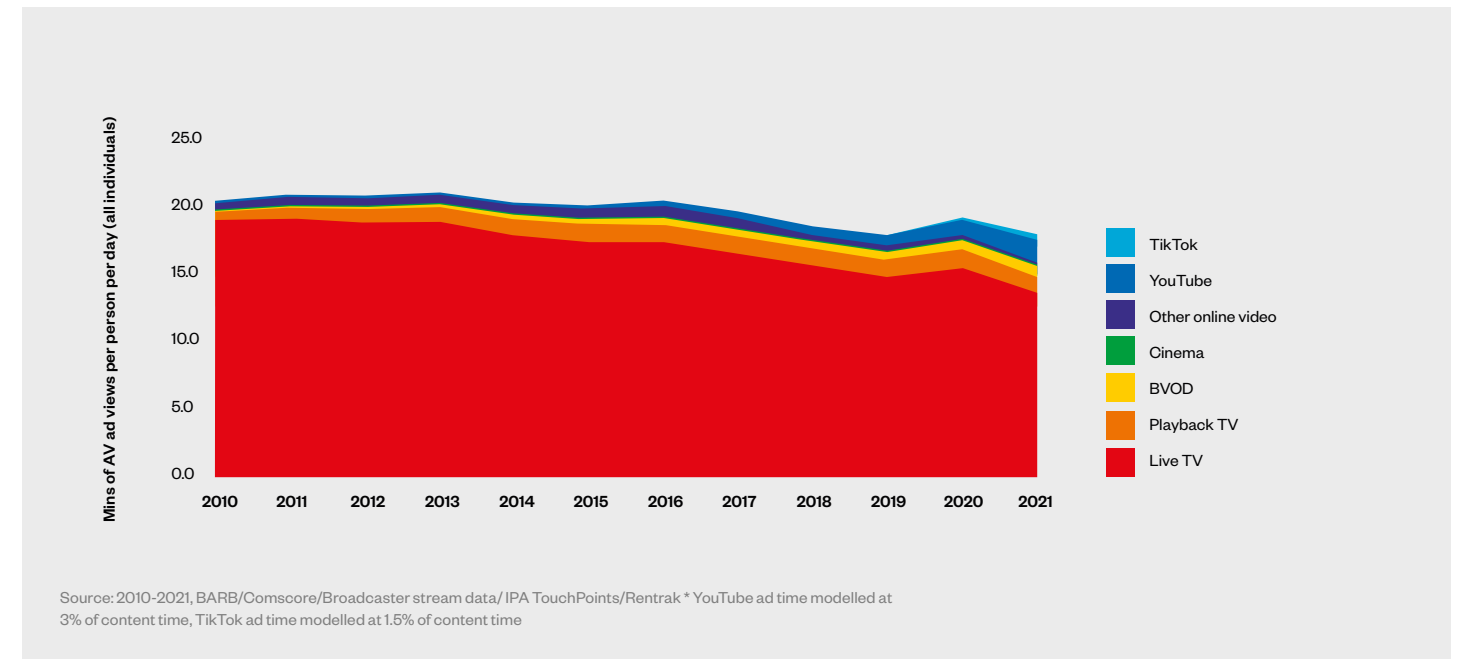
### Video ad time being squeezed by SVOD

We're entering a time of constrained advertising opportunity within high-quality, professionally produced video content with some viewing shifting to ad-free environments. For all individuals, video viewing time is down, but it's manageable.

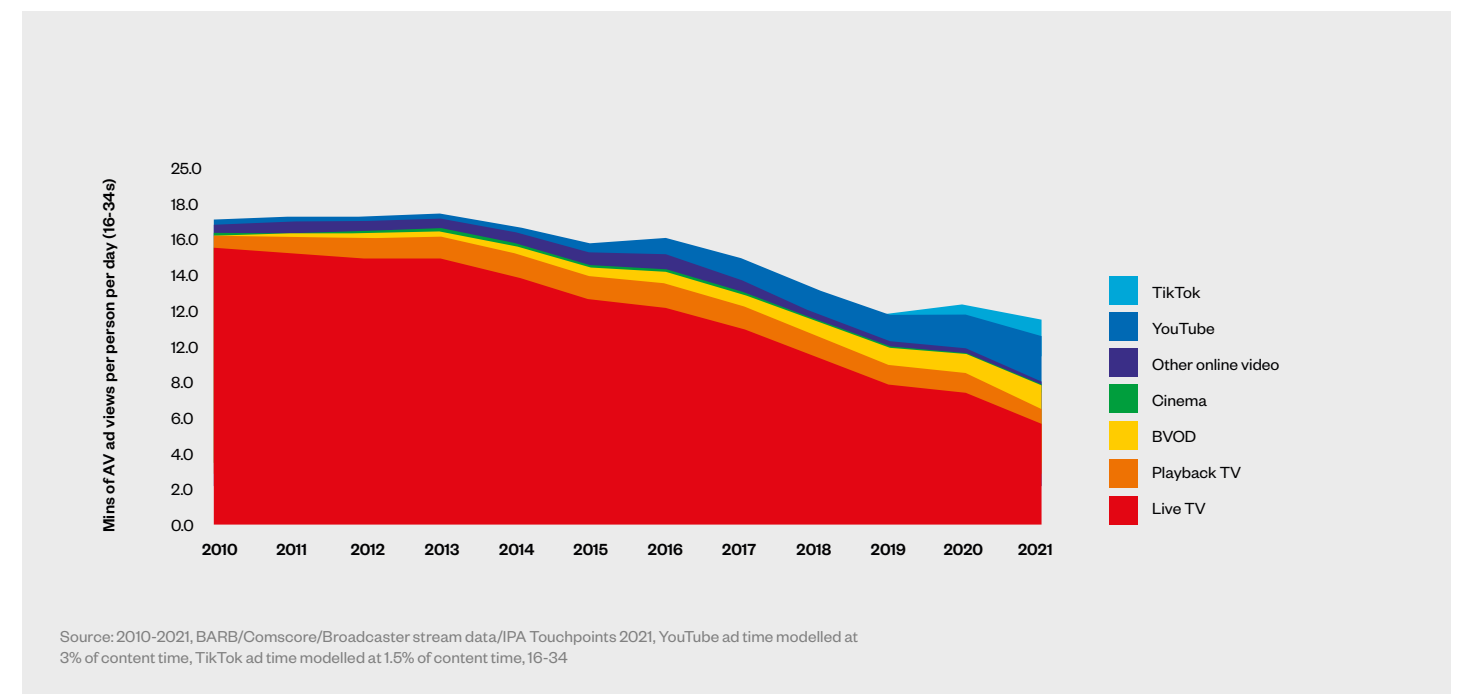
But, for 16-34s, the effect of shifting viewing behaviour is more severe and the case for cross video planning is clear.

Shortly, we'll look at what best practice in AV planning now looks like. But before that, we need to look at the issue of advertising price inflation.

### Video advertising time is being squeezed by SVOD...



### ... and even more so for younger audiences





# Inflation in context

We saw earlier that there are many positive factors driving TV advertising's return to growth, but price inflation will have played a part too. Inflation is a challenge but it is not a very useful measure in and of itself, and it is important to put it in context. So let's do that.

The chart below shows the changing average price of TV over time using constant prices for three of the main buying audiences: Adults, Adults ABC1, and 16-34s.

The impact of the pandemic is clear to see. Demand for TV advertising was hit in 2020, but supply (viewing) increased as people spent more time at home. So TV's price dropped.

In 2021, when demand came back and viewing returned to pre-pandemic patterns, the needle moved the other way and TV's price went back up. This increase has been compounded by some of the consequences of the reduction in advanced booking (AB) deadlines for advertising introduced by the broadcasters in 2020.

## Summary:

Huge increase in advertiser demand and a return to pre-pandemic viewing patterns saw TV's price increase

TV remains incredible value compared with other forms of video advertising

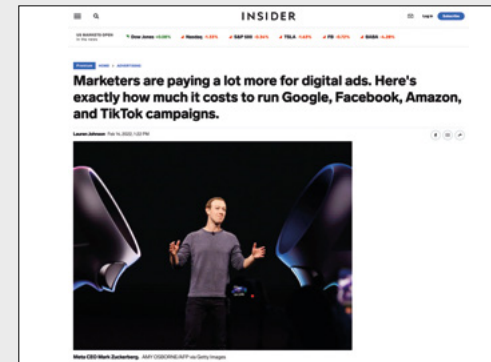
TV is a third less than the price of YouTube and less than a tenth the cost of other online video in terms of cost per 30 seconds

### How TV's price has changed



Source: BARB / WARC / AA - Constant prices based on RPI

### Inflation is not just a TV problem



AB deadlines were reduced, following pressure from the industry, to give advertisers more flexibility to cope with the uncertainty caused by the pandemic and the ability to get on TV at much shorter notice. However, those upsides had downsides - namely they made the market more difficult to predict, which meant pricing volatility. No one, for example, predicted the enormous surge in advertiser demand for TV in Q4 2021.

So pricing hasn't only increased, it has become harder to forecast, which makes for difficult conversations with finance departments.

That said, for broad audiences - Adults and Adults ABC1 - when going back to 2015, the price of TV hasn't dramatically changed. There's been a reversal of the trend in lowering prices, but TV is still cheaper in 2021 than it was in 2016.

For 16-34s, though, it's a different story. In 2021, there was a sharp and significant increase in the CPT for 16-34s. This is the audience most impacted by the transition of viewing from linear to on-demand viewing and so this is where linear pricing increases are most severely impacted.

With BVOD pricing sitting at around £25-30 for this audience, a price that has remained stable for a decade, BVOD has now become the starting point for cost-effectively reaching 16-34s.

The other context in which it is important to consider the changing price of TV, is that this is not a challenge unique to TV. There has been a well-reported surge in the cost of 'digital' advertising, due to a range of reasons, including increased demand and the impact of Apple's privacy and ad-targeting changes.

The transparency of how linear TV is measured means that it's easy to see how pricing has changed overtime. There is nowhere to hide, anyone can see what is happening if they want to. It's this transparency that has formed the basis of the auditor business model.

Online is different. The walled data gardens of platforms like Facebook are not so easy to scrutinise. Yet that doesn't mean that they're not also susceptible to fluctuations in price. A recent report by Insider found that advertising prices are soaring across Meta, Google, Amazon and TikTok, with Meta's CPM up 61% year-on-year, Google's programmatic display up 75%, and YouTube's CPMs up 53%, according to measurement firm Measured.

It is easy to appreciate the frustration and headaches that inflation causes media agencies and advertisers.

But inflation is not a very useful measure in and of itself. The more important thing to assess is the value of any given advertising channel and a starting point for this should be an apples-with-apples comparison on price.

The chart below shows the estimated average CPT for 30 seconds of AV advertising. TV is, as you can see, by far the lowest - two thirds the price of YouTube, which is pretty modestly priced.

But TV is less than a tenth the cost of other online video - like Facebook - because of online video's cost-per-start trading model and the ease with which users can avoid it.

So TV remains incredibly good value, and this is before we consider all the other environmental and quality factors that influence what matters most: effectiveness.

### TV remains very good value vs. online video

#### Average cost per 30 second (000s)



Source: 2021, Thinkbox estimates using AA/WARC, ComScore, BARB



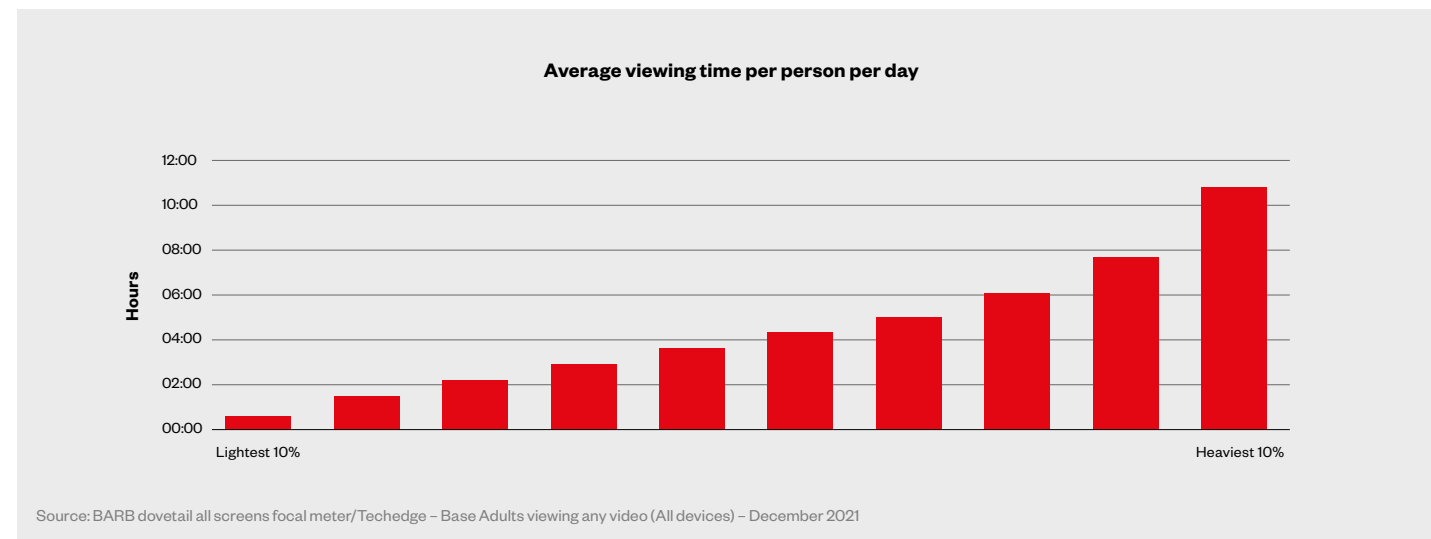
# Planning for today's TV

Changes in how people watch TV are making advertising in the video world ever more complex. The solution is excellent planning and the smart use of today's TV and its advanced toolkit. We need brilliant planners like never before – and it has never been a better time to be a planner, with so much to play with and explore. Here we look at some key points to consider.

### Time with video varies from person to person

Our total video analysis (see page 17) gives us a snapshot of the viewing behaviour of the entire population. That's very useful, but averages don't convey nuance, and nuance matters. There is a world of diverse viewing patterns across millions of people that needs to be understood to make the best planning decisions.

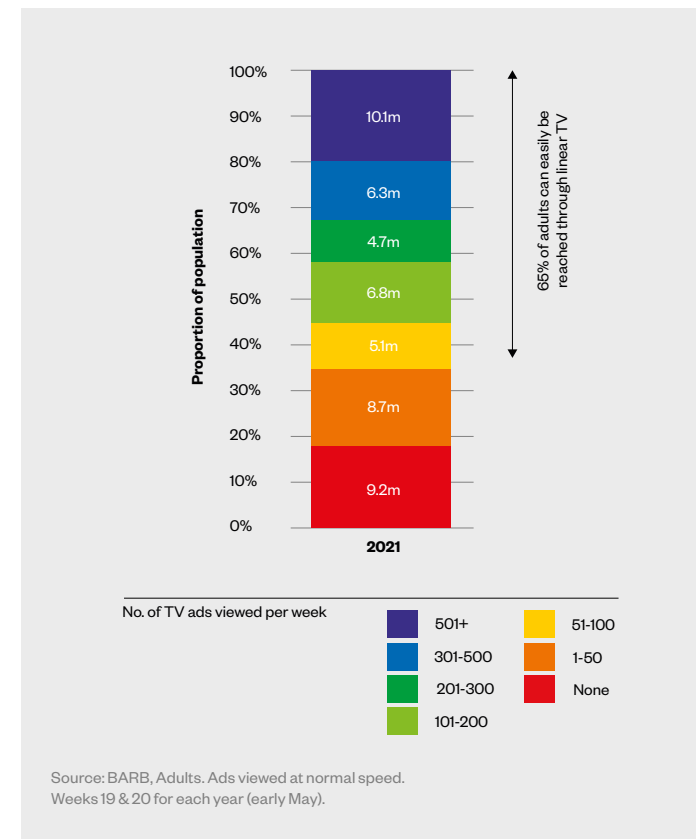
The new total video picture now available from BARB is here and we're starting to get a glimpse of some of the more granular detail on how viewing behaviour differs. The chart below, for example demonstrates how our total video consumption varies from the lightest-viewing 10% to heaviest-viewing 10%. The difference is enormous: 30 minutes of video a day for the lightest; 11 hours (yes hours) of video per day for the heaviest.



**Summary:**

- Effective reach planning sits at the heart of a successful campaign
- Linear TV remains central to reaching broad audiences
- For lighter viewers, think about different dayparts, content that spikes and dedicated programming
- 16-34 planning should be weighted to BVOD

Demographics will explain a lot of this – for example, it's likely that older viewers with more free time will make up a large proportion of the heavier viewers – but not all of it. And this data matters because, most of the time, effectiveness is all about reach. So effective reach planning sits at the heart of a successful campaign.



### Linear TV is central to reaching broad audiences

65% of Adults watch over 50 linear TV ads a week, so they can be pretty easily reached with linear TV.

Just over 8.7 million people watch between 1-50 linear TV ads in a typical week. These viewers can also be reached, but it's harder to find the spots where they can be found. This is what the art of TV planning has always really been: finding the right laydown of spots to have the best chance of reaching the lighter viewers.

### Where are lighter viewers found?

The chart below shows a TV daypart heatmap of the times when lighter viewers are most likely to account for a higher proportion of the audience. It clearly shows how vital peak-time viewing is. But late night/early morning does well too, as does early peak time at the weekends.

As well as understanding different dayparts, it is important to recognise the specific sorts of TV shows that are particularly good at reaching lighter viewers. For example, shows that create audience spikes, like major sporting events; one-offs like Friends: The Reunion or the Meghan and Harry interview; and headline-grabbing shows that bring the nation together, like The Great British Bake Off and the Euros.

TV shows that skew younger are also an obvious place to reach hard-to-find younger audiences who are typically lighter TV viewers. And then there are the dedicated ethnic TV channels that can help drive reach for audiences less likely to be found watching mainstream channels, such as Zee TV and Vox.

**Light linear viewer index by daypart (lightest is the lowest 25%)**

	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12pm	1am	2am	3am	4am	5am
Mon	109	79	73	64	59	61	57	68	61	47	47	59	73	95	121	174	153	94	86	86	142	128	136	103
Tues	91	78	64	55	51	52	60	57	50	44	46	54	62	84	170	173	121	108	93	81	107	90	82	76
Wed	101	89	65	60	52	53	60	63	53	43	43	55	71	95	147	178	137	92	82	86	128	84	91	85
Thurs	98	86	97	77	51	63	66	70	59	49	47	58	70	93	113	193	128	109	94	101	148	107	95	95
Fri	83	83	77	67	62	66	64	64	48	42	46	61	72	91	123	182	149	119	97	93	118	110	79	81
Sat	80	89	88	74	74	75	81	85	84	78	78	94	106	113	119	124	112	113	89	80	98	83	85	86
Sun	82	75	76	78	62	59	69	69	73	78	81	92	102	109	130	147	116	100	77	76	146	130	103	77

**Content that spikes**

**Content that skews younger**

**Dedicated Ethnic channels**

Source: BARB: 2021 – Light linear viewer = Adults lightest 25% of viewers (Commercial)

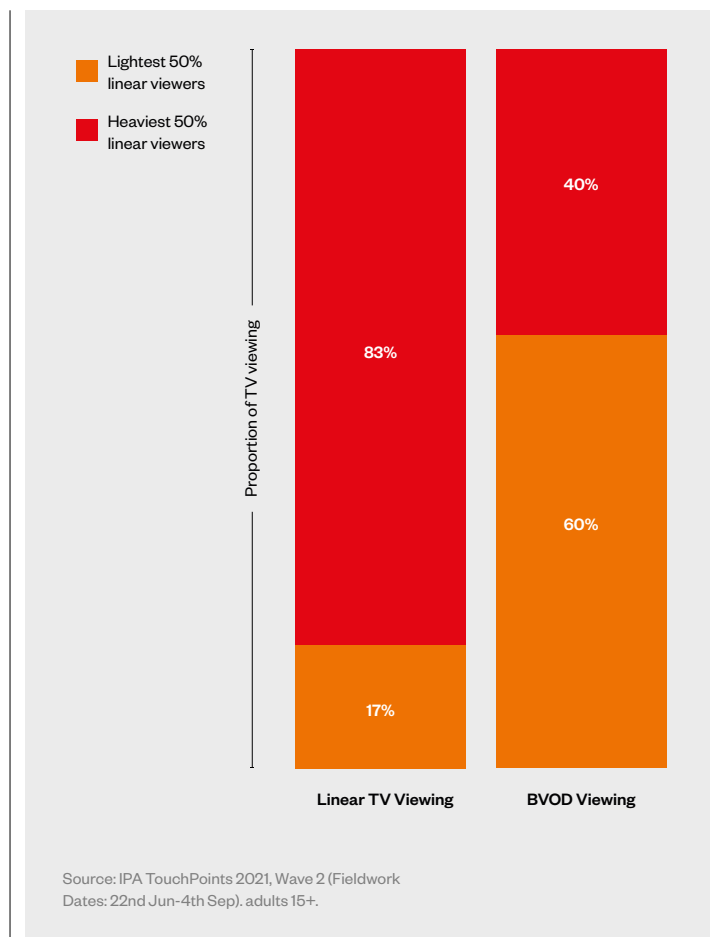


**Lightest linear viewers watch the majority of BVOD**

Moving away from linear TV, we know that viewers of Broadcaster VOD are more likely to be lighter viewers of linear. They are complementary on the media plan.

**16-34s planning should be weighted to BVOD**

As we saw earlier (page 20), BVOD is the most cost-effective way to reach 16-34s, and plans focusing on this audience should lean towards BVOD, even though the most cost-effective plan will involve both linear and BVOD.

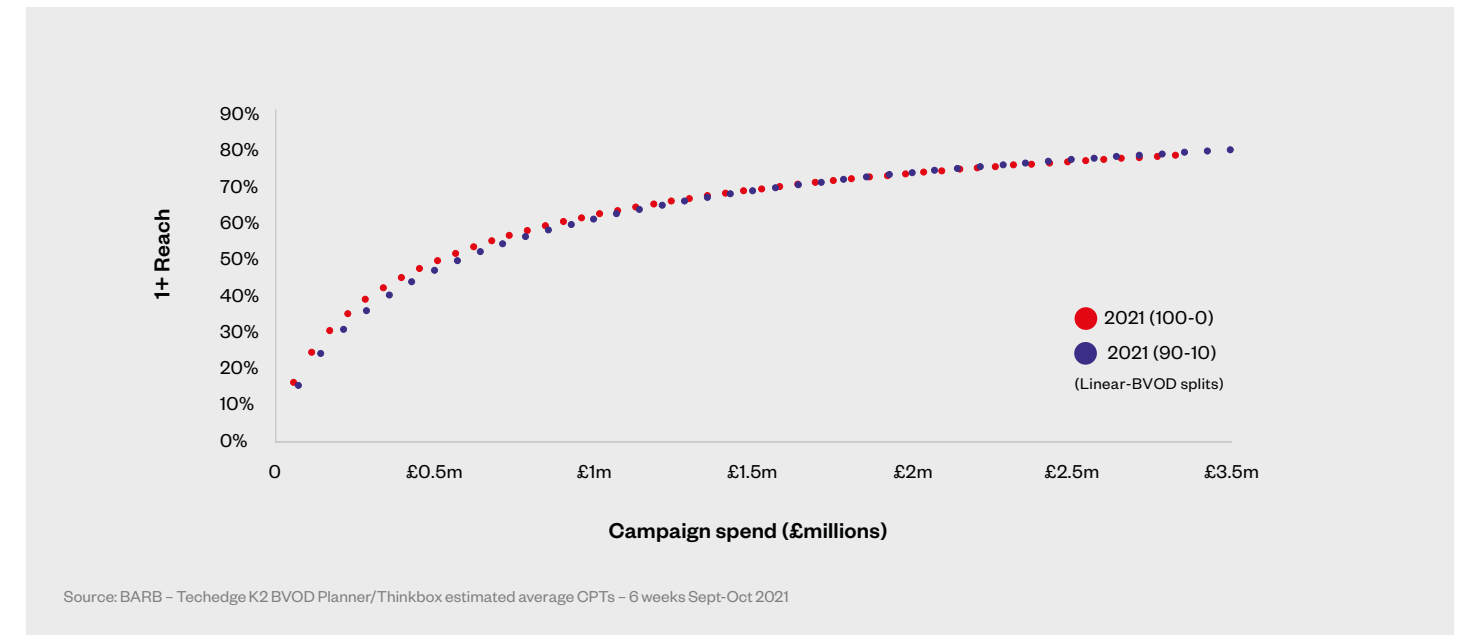


**Does BVOD add value to a campaign targeting all-Adults?**

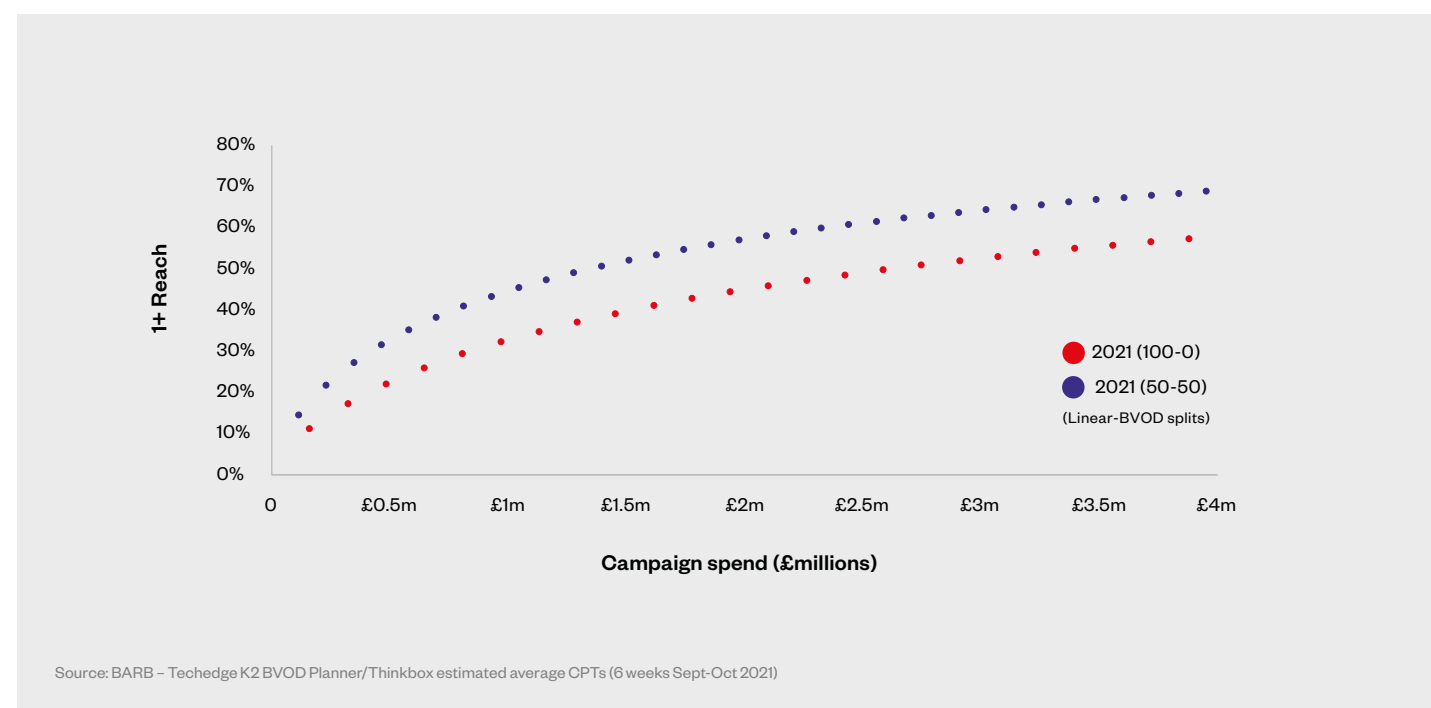
Interestingly, for an all-Adults audience, because of the price differential between linear TV and BVOD, at first glance there doesn't appear to be a clear cut case for investing across both linear and BVOD (see chart below). The curves look pretty identical.

But this is because an all-Adults reach curve doesn't detail the profile of those reached. If you look at this profile, then adding roughly 10% BVOD to the media plan will ensure a healthier mix of reach across age groups.

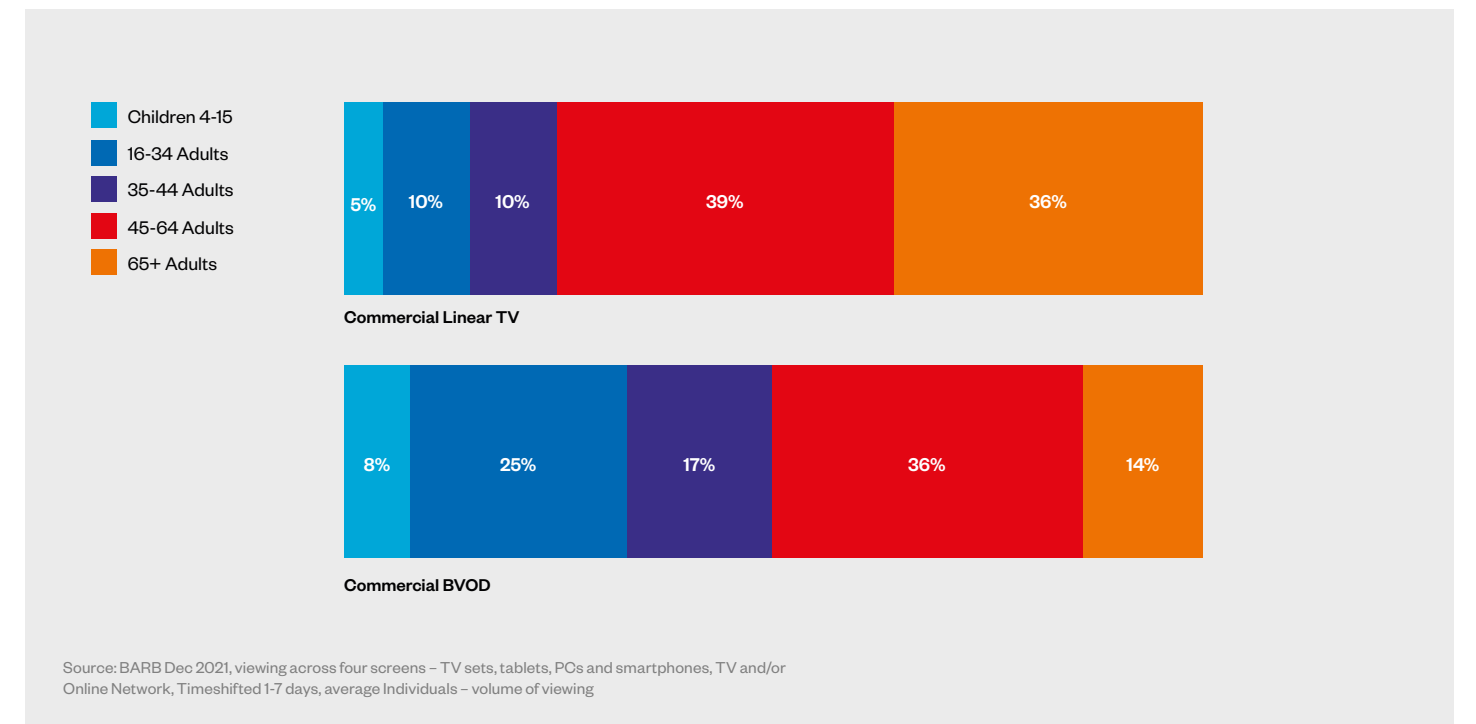
**At face value, BVOD doesn't add cost-effective reach for all Adults**



**TV planning for 16-34s should be weighted to BVOD**



**BVOD will help advertisers targeting all Adults reach a younger profile of viewers**







# The smartest planning



# Thinkbox TV Planning Awards 2021



With a record-breaking number of entries this year, the TV Planning Awards once again highlighted the amazing talents of TV planners. For the first time, we crowned a TV Planning Agency of the Year, and our Young TV Planner of the Year category returned, showcasing the next generation of media planning talent.

A huge thank you to our brilliant judges, who had tough decisions to make when crowning the winners.

**108** We received a record-breaking **108 entries**

## Judges

**Phil Bastable**  
Head of Marketing  
NHS England

**Clare Chapman**  
CEO  
Carat UK

**Lindsey Clay**  
Chair of Judges  
& CEO Thinkbox

**Sophie Devonshire**  
CEO  
The Marketing Society

**Ewan Douglas**  
Head of Agency  
& Client Sales  
Channel 4

**Laura Fenton**  
CEO  
OMD UK

**Colin Gillespie**  
Chief Strategy Officer  
All Response Media

**Zoe Harkness**  
Head of Training  
Thinkbox

**Toby Horry**  
Group Brand and  
Content Director  
TUI

**Paul Hutchison**  
CEO  
Wavemaker UK

**Sarah Jones**  
Director of Planning  
Sky Media

**Charlotte Knope**  
Associate Director  
(Broadcast)  
Running Total

**Stephanie Marks**  
Managing Director  
Havas Media UK

**Andrew Perkins**  
Group Head of Planning  
VCCP

**Rupen Shah**  
Head of Client Services  
Thinkbox

**Jen Smith**  
Co-founder  
Craft Media

**Richard Warren**  
Marketing Communications  
Director  
Lloyds Banking Group

**Nadine Young**  
CEO  
Starcom

## 2021 Winners

**Grand Prix & Best ongoing use of TV**  
Wavemaker for Nationwide

**Highly Commended:** OMD UK for NFU Mutual

**Best use of sponsorship**  
OMD UK for Walkers

**Best use of content**  
Tesco with MediaCom UK, BBH,  
Thames TV & ITV for Tesco

**Best small budget use of TV**  
december19 & Weave for People's Energy

**Highly Commended:** Love or Fear & Running Total Media for Elder

**Best integrated campaign**  
MediaCom UK for Direct Line

**Highly Commended:** Republic of Media with ITV,  
Propaganda & Souter PR for Roberts Bakery

**Best newcomer to TV**  
UM Birmingham for Dexcom

**Young TV Planner of the Year**  
Becky France - OMD UK

**TV Planning Agency of the Year**  
OMD UK

## Special Prizes

**Best use of TV in a crisis**  
MediaCom UK for Tesco

**TV for good**  
PHD for British Heart Foundation







**Grand Prix & Best ongoing use of TV Voices**

Wavemaker UK for Nationwide

Nationwide is different from the banks it competes with. It's a building society, owned by and run for the benefit of members, not shareholders.

Setting itself the bold challenge in 2015 to "tell the greatest brand story ever told", Nationwide has used TV to transform it from challenger brand to the nation's most considered and trusted financial services provider.

Since VCCP's creative platform 'Voices' launched in 2016, every TV ad has been a thread in the story that shows how Nationwide is different.

Wavemaker have used every trick in the book to maximise the power of this campaign, from mass moments of togetherness to data-driven targeting for niche audiences and outstanding partnerships with broadcasters, such as the award-winning 'Together Against Hate'.

By blending distinctive creative and a smart TV-first strategy, Nationwide has seen sustained business growth, with econometric modelling proving TV's outstanding contribution to delivering both short- and long-term health. Nationwide has found its voice.

**HIGHLY COMMENDED**  
 OMD UK for NFU Mutual

**SHORTLIST**  
 MediaCom UK for Lloyds Bank



**TV Planning Agency of the Year OMD**

For the first time, the Thinkbox TV Planning Awards crowned a TV Planning Agency of the Year.

This award is to recognise the agency that has demonstrated a commitment to innovative TV planning and to exploring and exploiting the world of opportunities that TV in all its forms now offers. OMD's pioneering approaches to TV planning achieved impressive results for their clients. From helping brands on to TV for the first time to developing sophisticated AV planning systems, from clever uses of advanced TV to creative collaborations with broadcasters, this agency has consistently got the best out of today's TV.

“ OMD's pioneering approaches to TV planning achieved impressive results for their clients.”



**Best use of content Tesco & Supermarket Sweep**

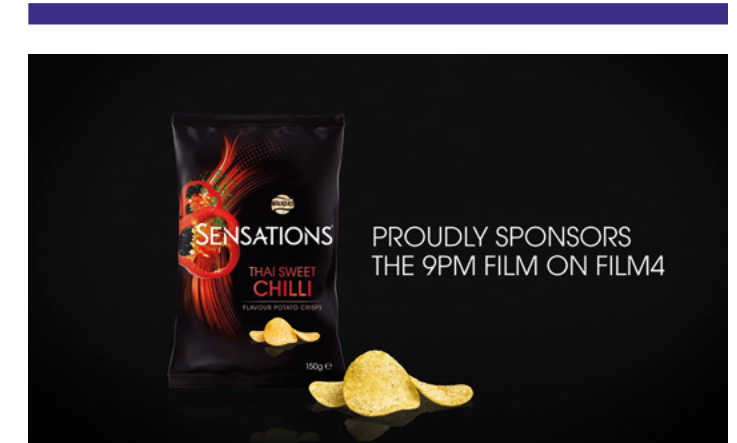
Tesco with MediaCom UK, BBH, Thames TV & ITV for Tesco

Great value has always been at Tesco's heart, but a combination of economic uncertainties meant there'd been a decline in value perceptions.

As part of Tesco's 100th birthday celebrations, their creative route was centred around 'prices that take you back'. They brought back iconic '90s game show, Supermarket Sweep, first on ITV2 and then on ITV. The 20 episodes, hosted by Rylan Clark-Neal, ran every weekday at 3pm and there were six additional celebrity specials.

The AFP was a great success. Value perceptions for people who watched the show were 26% higher than for those who didn't, all brand perception scores increased, and the partnership drove a profitable ROI in the short and long term.

**SHORTLIST**  
 Manning Gottlieb OMD for Age UK  
 PHD for The British Heart Foundation  
 Wavemaker UK for Paramount  
 Sonic the Hedgehog



**Best use of sponsorship Walkers Sensations**

OMD UK for Walkers

OMD sought to align Sensations with the 'relaxing night in' moment, in a memorable and distinctive way that appealed to their target audience of young adults.

The solution was a year-long sponsorship of The 9pm Film on Film4. A partnership with this prestigious property provided the perfect enjoy-and-indulge moment that appealed to their young target audience, but with the necessary reach and scale to make an impact.

It cemented Sensations as the perfect accompaniment to film. Significant uplifts were achieved in brand consideration and spontaneous awareness, and they moved to first place in association with a relaxing night in.

**SHORTLIST**  
 Total Media for Freshpet  
 UM Manchester for Aldi





**Best small budget use of TV**  
**Harnessing the power of DRTV**  
 december19 & Weave  
 for People's Energy

A new community-focused entrant to the home energy market, People's Energy had ambitious growth plans. december19 were tasked with raising brand awareness and growing the customer base, and TV was quickly identified as the lead channel. But, with dominant competitors fighting for the same channels, months, and dayparts, they had to be inventive.

With less well-off consumers being ignored by the big players, Weave took a fully DRTV approach with a new brand ad featuring rugby legend Gareth Thomas. It successfully reached this untapped audience and avoided the competition whilst being on air during the same crucial switching period.

The campaign led to a massive 41% rise in customer growth, a 69% increase in prompted brand awareness, and helped People's Energy on its mission to end fuel poverty.

**HIGHLY COMMENDED**  
 Love or Fear & Running  
 Total Media for Elder

**SHORTLIST**  
 Manning Gottlieb OMD  
 for NHS Blood and  
 Transplant (HM Gov)  
 The Barber Shop  
 Blonde & SixteenByNine  
 for Parkinson's UK



**Best integrated campaign**  
**We're On It**  
 MediaCom UK for Direct Line

With an ambition to become the UK's insurance superbrand and a new creative platform to launch, Direct Line needed to grab disproportionate attention and defy category norms.

In a world first, MediaCom's launch of 'We're On It' saw broadcasters curate bespoke channel intros for the superhero-beating executions, along with a major channel roadblock featuring all the superheroes in a single break.

This approach was mirrored across BVOD and was supported by high impact out-of-home and partnerships with Metro and the Daily Mail.

They also developed an advanced methodology to navigate video spend in real time, calculating a cost per completed viewable rating in TV, BVOD and YouTube to deliver incremental reach efficiently without bombarding.

The superhero ads delivered an ROI 81% better than sales-focused ads, with CPAs that beat Winston Wolf. Direct Line overtook Aviva to become first in insurers rankings for brand preference and communications awareness, and are now well on track for superbrand status.

**HIGHLY COMMENDED**  
 Republic of Media with  
 ITV, Propaganda & Souter  
 PR for Roberts Bakery

**SHORTLIST**  
 MediaCom UK for Tesco  
 the7stars for On the Beach



**Best TV newcomer**  
**Putting diabetes warriors**  
**in the spotlight**  
 UM Birmingham for Dexcom

The Dexcom G6 Continuous Glucosamine Monitoring technology allows Type 1 Diabetics to monitor blood sugar levels on their smartphone without the inconvenience and pain of finger-pricks.

UM Birmingham turned to TV with a plan to reach all potential prospects in a trusted environment and drive lead generation in demand-harvesting channels.

Key was identifying contextually targeted 'moments' and optimising day of week, time of day and programming to maximise performance.

Results were astounding – TV had an ROI of £2.40 for every £1 spent and awareness grew 15%. TV has proven to be a key pillar of the marketing mix.

**SHORTLIST**  
 Havas UK for Royal Mail  
 Pintarget & Isobel for Jet UK  
 Republic of Media for Jura  
 Whisky (Whyte & Mackay)



**Young TV Planner of the Year**  
**Becky France**  
 OMD UK

Being a TV planner carries enormous responsibility for a brand's success, demanding creativity, curiosity and collaboration, in addition to the rigorous craft skills that TV planning has always required.

Open to media agency planners aged 30 years and under, this award recognises planners who are on track to become the next industry leaders. They are advocates for TV and able to demonstrate a proven track record of making an impact for their agency and clients through exceptional media planning with TV at the heart.

A self-confessed TV lover, Becky stood out to the judges for her depth of industry knowledge, fantastic client work and support for the next generation of TV Planners.

**You can hear more from Becky on page 42.**

**SHORTLIST**  
 Chris Lucas, Mostly Media  
 (now McCann Bristol)  
 Sean Taylor, Essence  
 Jasmin Weston-Smith,  
 Mindshare UK





**Special award: Best use of TV in a crisis**  
**Tesco during the COVID pandemic**  
 MediaCom UK for Tesco

Coronavirus changed Tesco's priorities from selling to serving the nation and they were first-in-sector to air a COVID-related campaign – planned and executed in just 72 hours.

Their approach was resolutely TV led – to reach and reassure the nation fast – with press and radio driving frequency, and out-of-home supporting key workers.

Agencies and media had to work closer than ever, moving from campaign planning to real-time planning: a colossal and complex undertaking.

As the nation established new routines, food and cooking from home became an emotional connector as well as a practical necessity. By adapting its Food Love Stories, Tesco had a great way to reflect this and bring something lovely and emotive to the country.

Tesco's focus and agility saw them labelled No.1 brand "doing the right thing during lockdown"; quality scores rose; 366,000 new shoppers came through the doors; and colleague pride increased by 27%.



**Special award: TV for good**  
**24 Hours in A&E: Heart Special**  
 PHD for British Heart Foundation

PHD were tasked with finding a new, compelling way to communicate the link between the British Heart Foundation's pioneering research and the life-saving treatments people receive every day.

They harnessed the storytelling power of TV to deliver a one-off, 60-minute, primetime special of 24 Hours in A&E on Channel 4. The programme told the stories of three people with serious heart and circulatory conditions.

The show was watched by 2 million viewers, who were also targeted in the show's ad breaks with bespoke donation ads featuring the families in the show. As a result, in a single night the British Heart Foundation received 62% more text donations than they typically receive in a month.



Ant & Dec's Saturday Night Takeaway, ITV



# Planning for the World Cup

FIFA World Cup Qatar 2022 is advertising's biggest 'set-piece' opportunity. Brands should start planning for FIFA's first winter World Cup.

## Richard Kirk

Chief Strategy Officer, Zenith UK



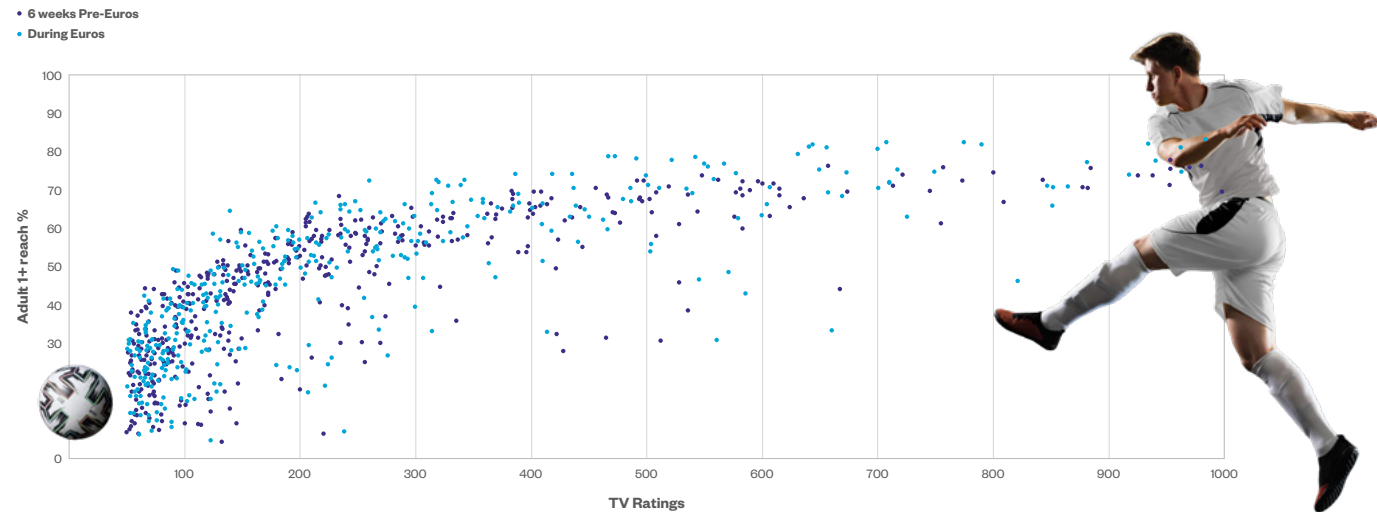
World Cup 2022 in Qatar is now only a matter of months away. It's the first time a major football tournament has landed in the middle of the UK's peak advertising season. I for one, am very excited – as a Sheffield United fan, the World Cup represents a very infrequent opportunity to support a team that might win something! But the media planner in me is also fired up. Let's not underestimate this: we're talking about the biggest set-piece opportunity for advertising of the decade. Advertisers that get Q4 2022 right will likely deliver unprecedented levels of effectiveness. That's why recently we brought over 100 clients and planners together to

get our eyes on the prize. New data from Thinkbox, based on the Euros 2020 (or was it 2021?!) shows that tournament football offers incredibly cost-effective reach and an unparalleled ability to reach younger, wealthier consumers at scale. Couple that with an audience geared up to spend, and Gareth's boys looking good for a tilt at the title, and the lure of Qatar for advertisers becomes clear. Campaigns with 300-400 ratings can easily attain the same level of 1+ reach as campaigns with 900 ratings outside of the tournament.

“Let's not underestimate this: we're talking about the biggest set-piece opportunity for advertising of the decade.”



## Campaigns in tournament can achieve same reach as campaigns 3x larger outside of tournaments



Source: BARB, All 50+ rating campaigns 6 weeks pre and 6 weeks during the Euros

The footy also brings together these valuable audiences in groups (below). Given Christmas is not just about gift giving, but also when couples and families make major decisions about big-ticket items, it may be that we see some big Boxing Day/January spenders pull campaigns forward into December.

Whilst its fair to say next Christmas isn't brilliant for those advertisers chasing efficiency, it is set to be a bonanza for those firms who wish to drive growth, and build lasting brand perceptions.

But to seize this opportunity, planners (especially in media) must be cogniscent of several unique challenges that are coming together at once for the first time:

- Whilst Christmas decision-makers and buyers tend to be female, tournament audiences skew male.
- Media pricing has been volatile in recent months, and an unprecedented World Cup Christmas makes it likely cost could remain hard to predict.
- There will be a rush of advertisers pursuing a limited amount of premium inventory; you will have Q4 seasonal advertisers, brands that traditionally spend in sporting tournaments, brands upping the ante after two COVID Christmases, and potentially some brands looking to make a big bang before HFSS regulations arrive in January 2023. Standing out will be harder than ever.
- The World Cup is taking place in Qatar – a nation with a problematic stance on equality and human rights. Marketers will need to have contingency plans in place for their campaigns should internal or external stakeholders raise concerns, both in the planning and activation phases.

For once, advertisers and agencies really ought to practise the 'long-term thinking' we preach about.

Now is the time for senior marketers to be making the case for a strategic investment in communications during Q4 2022, and the proposed measures of success.

With alignment in the business before the end of January on the opportunity of a World Cup Christmas, a brand can then engage key media owners like ITV and Twitter early to secure the best inventory – which may be available to option as soon as the play-offs finish.

## Tournament audiences are highly valuable and look very different to standard linear viewing

Audience	Game profile				TV Average
	Low	Mid	High	Eng	
Men	147	143	138	128	46%
Adults 16-44	140	155	167	179	20%
Adults ABC1	101	109	116	118	48%
Shared Viewings (2+)	120	129	136	136	38%
Shared Viewings (3+)	117	142	181	251	8%

Source: BARB

ITV's World Cup timeline as it stands is below. And whilst they were accepting ads into the England vs Denmark game at the Euros up until 24 hours ahead of time, the smart money is on flagging your interest early to secure the best packages and slots.

So media planners, start your engines. Whilst the football doesn't kick off for a good few months, maybe now is the time to be convening senior marketers on both sides of the agency/client relationship to begin plotting how you will bring about World Cup glory.



## ITV's current timeline to Qatar 22

Timings	Event
Q1 2022	Broadcast sponsorship to open market – scalable options
Q1 2022	Cultural and Creative World Cup presentations to agencies and clients
April 1st	Finals Draw – ITV and BBC begin to select matches and announce fixtures
From May	Commercial World Cup presentations to agencies and clients
May	Conversations on packages and contextual opportunities can begin
June	Play-offs completed – all finalists confirmed
Sept 6th	November AB – Approve campaigns group schedules are laid down
Oct 4th	December AB – Approve campaigns group schedules are laid down
Nov 21st	Tournament starts – on a Monday!
Nov 25th	Black Friday – four matches on day and previous day

This article originally appeared in Campaign magazine, December 2021



# Video planning in today's world

## Becky France

Business Director, OMD UK and Thinkbox  
Young TV Planner of the Year 2021



The ever-evolving TV landscape makes it a very exciting time for planners. But, with so many new opportunities in market, we need to think holistically about video planning and ensure it complements the great foundation that TV provides. With this in mind, there are some key considerations for video planning in 2022:

### Effective reach

- The evolving AV landscape means there are numerous opportunities offering smart ways to extend the reach of your TV campaign. But simply increasing reach is not enough; we need to be effective.
- Not all views are created equal – starting with quality environments and content is a must. There is certainly a role for social video, UGC and skippable formats on a plan, but we must understand how these solutions work alongside broadcast to drive reach effectively.

### Holistic AV Measurement

- With so many new offerings in market comes new measurement solutions. Getting measurement right is paramount, and we are on the cusp of holistic video measurement. With Thinkbox, brands, agencies and suppliers collaborating on Project Origin and CFlight, I'm excited for what 2022 has in store.

### Environment & context

- TV's dual ability to offer both personal moments in which to resonate, and shared moments to celebrate, means empathy is key to an effective TV plan. With the 2022 World Cup on the horizon, TV's ability to bring people together in such huge cultural moments will be more important than ever.

### Capitalising on your audience's attention

- Attention is this year's buzzword, but it's been a focus of our planning at OMD for years – our research illustrates the link between ad attention and business growth, so we have developed tools to account for this. Omni's Multi-Screen Optimiser accounts for viewability and effectiveness inputs, ensuring our AV plans are optimised towards attention metrics.
- Screen size is another important driver of attention. With BVOD viewing increasingly taking place on a TV set, the channel is becoming even more important in driving attention for advertisers. At OMD we optimise towards this, doubling down on this trend to deliver enhanced business growth for our clients.

### Developing audience-targeting capabilities

- Linear TV continues to drive huge scale, but there is an increasing role for addressable. With developing data and tech capabilities, broadcasters are now able to offer addressable solutions to match that of digital counterparts.
- Our understanding of audiences and the wider AV landscape has greatly increased thanks to BARB's Focal Meter. Knowing when elusive subscription VOD viewers or heavy gamers come to TV is crucial to planning, allowing us to continue to speak to these audiences in broadcast environments and drive overall reach of our campaigns. As we move through 2022 and the pool of Focal Meter data grows, our insight and audience understanding will only increase.

Ultimately, as TV planners we need to be clear on the role of video and to continue to celebrate it in all its forms.

- Unapologetic, Channel 4
- The Ipress File, ITV
- Mel Giedroyc: Unforgivable, Dave







# Views on viewing





1 It's a Sin, Channel 4  
2 Awkwafina is Nora from Queens, BBC

# What did the industry watch in 2021?

## Jerry Daykin

Head of Global Media, Beam Suntory



### What was your TV moment of the year?

It's a Sin was a fantastic and provocative piece of film-making – emotional and wonderful telly with an important educational and representational role. A great 'follow up' 20 years after Queer as Folk.

### Describe your viewing habits in 3 words?

Binge, Watching, Catchup.

### Best discovery in 2021 (new or old classic)?

I've loved rewatching The Golden Girls.

### What's your TV guilty pleasure?

Death in Paradise – so glad it is back on.

### Which two TV characters would you invite over for dinner?

Clark Kent and Captain Picard, they'd both have some amazing stories to tell.

### What TV can't you wait for in 2022?

I love the Eurovision Song Contest every year, and the several new Star Trek series.



## Laura Jordan Bambach

President & CCO, Grey



### What was your TV moment of the year?

It's a Sin. "La!"

### Describe your viewing habits in 3 words?

Darker the better.

### Best discovery in 2021 (new or old classic)?

I went down some amazing rabbit-holes on VOD with things like Walter Presents but as per my first answer, it's got to be It's a Sin. And I still LOVE Pose. Both speak to very different sides of the queer experience around the time and around the world, at around the same time as I was stepping into adulthood in the very early '90s. And although really different, there was a lot to take from them both. Oh the tears and the joy and the raw feeling of it all. Dopesick was also incredible.

### What's your TV guilty pleasure?

Having a police procedural on in the background is what I use when I write – I'm no good with silence but equally no good with something so engrossing that I lose focus.

### Which two TV characters would you invite over for dinner?

Nadya Vulvokov from Russian Doll and Awkwafina/Nora from Awkwafina is Nora from Queens.

### What TV can't you wait for in 2022?

Hopefully some great Australian drama and comedy that makes it across this side of the world.

## Richard Morris

CEO, UK & Ireland, Mediabrands



### What was your TV moment of the year?

Emma Raducanu's majestic ace to win the US Open. Thank you, Channel 4.

### Describe your viewing habits in 3 words?

Sporadic but intense.

### Best discovery in 2021 (new or old classic)?

The White Lotus. Incredible yet despicable characterisation.

### What's your TV guilty pleasure?

Shetland. Slow moving and strangely comforting for a crime drama.

### Which two TV characters would you invite over for dinner?

Larry David and Armond from The White Lotus. I wouldn't know what to cook but it would surely be a memorable evening.

### What TV can't you wait for in 2022?

The FIFA World Cup. England has unfinished business.

1 The White Lotus, Sky Atlantic

2 Succession, Sky Atlantic

3 The Great British Bake Off, Channel 4

4 2022 FIFA World Cup Qualifiers, ITV



## Sarah Jenkins

Managing Director, Saatchi & Saatchi London



### What was your TV moment of the year?

18th Oct 2021 – Succession season 3, episode 1 on Sky Atlantic. When that opening soundtrack kicked in, I was literally giddy.

### Describe your viewing habits in 3 words?

Too much dual-screening.

### Best discovery in 2021 (new or old classic)?

It's a Sin was brilliant, powerful and beautiful TV.

### What's your TV guilty pleasure?

Australian renovation reality TV series The Block. Am irrationally obsessed.

### Which two TV characters would you invite over for dinner?

Shiv Roy and Roman Roy, of course.

### What TV can't you wait for in 2022?

The Great British Bake Off will continue to be the TV hug we all need.



**Aidan McClure**

Founder and COO, Wonderhood Studios



**What was your TV moment of the year?**

Seeing every episode of Wonderhood's groundbreaking three-part documentary series about foetal surgery, Baby Surgeons, trend on Twitter and then being watched/reviewed on Gogglebox. (Shameless plug over.)

**Describe your viewing habits in 3 words?**

High, low, gutter.

**Best discovery in 2021 (new or old classic)?**

This is by no means a discovery being 18 series in, but the new Gogglebox is surprisingly good. Still funny and fresh and good for discovering more telly.

**What's your TV guilty pleasure?**

So many: Below Deck, Selling Sunset, Love at First Sight, Ben Fogle's New Lives in the Wild with a chaser of Cruising with Jane McDonald. The list goes on and on!

**Which two TV characters would you invite over for dinner?**

Armond the Manager from The White Lotus and Nikita from Love at First Sight UK. It'd be carnage.

**What TV can't you wait for in 2022?**

The Devil's Advocate on Sky: a beautifully shot docufilm about Giovanni Di Stefano, the lawyer who fooled the world.



- 1 Baby Surgeons, Channel 4
- 2 Ben Fogle's New Lives in the Wild, Channel 5
- 3 Ted Lasso, AppleTV
- 4 Unforgotten, ITV

**Sue Frogley**

CEO, Publicis



**What was your TV moment of the year?**

Easy – the moment that Emma Raducanu won The US Open women's final!

**Describe your viewing habits in 3 words?**

JOMO TV Night (in).

**Best discovery in 2021 (new or old classic)?**

Motherland was hysterical, but It's a Sin was brilliant – it was moving, joyful and gut-wrenching, all at the same time.

**What's your TV guilty pleasure?**

Unforgotten (a great show, only guilty as my husband can't stand Nicola Walker).

**Which two TV characters would you invite over for dinner?**

I'd invite Ted Lasso, and Elizabeth Harmon from The Queen's Gambit.

**What TV can't you wait for in 2022?**

Looking forward to the hilarious yet very real insight into a junior NHS doctor's experience, This Is Going To Hurt. My son's girlfriend is a junior A&E doctor and I am in awe of her daily.

**Pippa Glucklich**

CEO, Electric Glue



**What was your TV moment of the year?**

As an avid Chelsea fan, it has to be the Champions League Final on 30 May. Best night ever.

**Describe your viewing habits in 3 words?**

Eclectic, late-night, indulgent.

**Best discovery in 2021 (new or old classic)?**

It's a Sin. Tragic and joyous in equal measures – just brilliant on every level.

**What's your TV guilty pleasure?**

A Place in the Sun. I live vicariously through it.

**Which two TV characters would you invite over for dinner?**

Villanelle (Killing Eve), in her finest designer apparel and Roman Roy (Succession), all five-foot-six of him. A psychotic assassin and a chaos goblin, both of whom will say and do... anything. What could possibly go wrong?

**What TV can't you wait for in 2022?**

Love Island, always. The next series of Bridgerton. Although I can't help thinking it won't have quite the same appeal now the Duke of Hastings won't be back... And of course, Series 4 of Succession. Gutted to hear that it could be its last.

- 1 Love Island, ITV
- 2 Killing Eve, BBC
- 3 Champions League Final, BT Sport

**Shazia Ginai**

CEO, NeuroInsight



**What was your TV moment of the year?**

It has to be Phil McCann being sent to report on the fuel shortage crisis we faced this year. It made us all chuckle.

**Describe your viewing habits in 3 words?**

Lazy, comforting, necessary!

**Best discovery in 2021 (new or old classic)?**

The best discovery for me was We Are Lady Parts. As a Muslim, south Asian, British woman, this show was hilarious and somewhat terrifyingly accurate.

**What's your TV guilty pleasure?**

Celebs Go Dating. I want to say it's primarily because as a researcher I enjoy anything that involves a social experiment, but I'd be lying. I watch it because I think Paul C Brunson talks about love in a prophetic way and for Rob Beckett's crass commentary.

**Which two TV characters would you invite over for dinner?**

I would invite Graham Norton for his ability to keep conversation flowing, for all the laughs and of course to hear his many stories of the lives of so many he has interviewed. I would also invite Elizabeth Moss. I would endlessly quiz her about how playing the main character in The Handmaid's Tale has impacted her life and career.

**What TV can't you wait for in 2022?**

The next season of Killing Eve, each season has blown my mind.





# Making a connection: how broadcasters are reaching younger viewers in the new video world

Journalist **John Plunkett** picks the enormous brains of TV commissioners at the broadcasters to find out how they are adapting their shows to meet the needs and tastes of younger audiences.



The intense competition for the attention of younger viewers is seeing broadcasters develop new strategies to connect with this hardest to reach of audiences.

It's not just rival streaming services such as Netflix and Disney+ that clamour for young people's time, it's the whole gamut of social and mobile media from YouTube and Spotify to Facebook and Instagram. And that's before we've even mentioned gaming.

In response, broadcasters are evolving a new relationship with the 16 to 34-year-old demographic, with common themes emerging from the approaches being taken by ITV, Channel 4, Sky and UKTV.

'We have got to consider who our young audiences are now, what they are interested in and what their beliefs are,' says Paul Mortimer, Content Director, On Demand and Acquisitions at ITV.

“We have got to consider who our young audiences are now, what they are interested in and what their beliefs are.”

**Paul Mortimer**  
Content Director,  
On Demand and  
Acquisitions, ITV



'We touch base with them often because we need to know what they're thinking – they are much more responsible and concerned about issues such as climate change and, more personally, about mental health and well-being. This isn't just lip service they are paying to it, they really understand these issues that [older generations] didn't need to contemplate.'

These changing concerns are reflected in a broadening of ITV2's output, including its first original drama in 10 years, Mark O'Sullivan's semi-autobiographical teen drama Tell Me Everything.

Exploring what it's like to be a teenager growing up in the social media age, the funny and provocative series set in Welwyn Garden City

tackles issues such as addiction, bereavement, prejudice and body image.

Alongside scripted commissions both in drama and comedy, Mortimer highlights documentaries as another key area going forward, including Getting Filthy Rich led by former Love Island star Olivia Attwood.

The series will investigate the phenomenon of people making huge amounts of money by selling sex online, on places like Cam Girls and OnlyFans, and explore all the issues around empowerment and exploitation that result.



→ The Rising, Sky

→ Tell Me Everything, ITV2





Karl Warner, Head of Youth and Digital at Channel 4, uses the acronym 'FAST' to highlight all the attributes he is looking for in a new commission – Funny, Authentic, Subversive, Timely.

**“You’re looking for broad subjects that this audience cares about – body image, money, relationships, whether that’s romantic or family based – and to find fresh ways to tackle that and say new things about it.”**

**Karl Warner**  
Head of Youth and Digital, Channel 4



‘Our best shows contain all of those ingredients,’ says Warner, highlighting E4 series such as Don’t Tell The Bride, Teen First Dates and Married at First Sight.

‘You’re looking for broad subjects that this audience cares about – body image, money, relationships, whether that’s romantic or family-based – and to find fresh ways to tackle that and say new things about it.’

Audiences want the same authenticity and immediacy that they have grown accustomed to on social media, says Warner.

‘We are talking to the audience all the time and they crave things that are real. Married At First Sight is our biggest-ever unscripted series on E4 and although it is heavily constructed in some ways, the emotional rollercoaster is absolutely true. They are not making it up.’

New E4 series include Queens of Clean in which a glam gang of cleaning enthusiasts help young people put their house in order, and celebrity dance show The Real Dirty Dancing, presented by Keith Lemon and Pussycat Doll Ashley Roberts.

E4 is also bringing back Embarrassing Bodies, the Bafta-winning series that ran for eight series

until 2015 and will be rebooted and recast.

**“We are always looking to stay just ahead of where our audiences are, trying to catch talent just before they take off...”**

**Mark Iddon**  
Commissioning Editor at UKTV



‘It’s really tricky with the younger demos because it’s very easy to see where they are right now and what they like right now,’ says Mark Iddon, Commissioning Editor, Comedy Entertainment, at Dave parent UKTV.

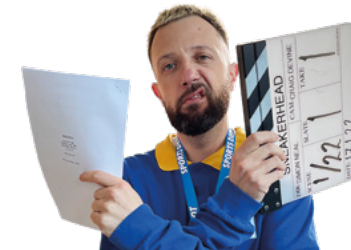
But the game is to know what they might like tomorrow [because] they are so platform agnostic and fluid. We are always

looking to stay just ahead of where our audiences are, trying to catch talent just before they take off and start a relationship so that we can be a part of it and build that talent for Dave.’

New shows coming up on Dave include The Island, a panel show hosted by Tom Allen, in which four comedians compete to make their own dream personal island the best one.

People Just Do Nothing’s Hugo Chegwin and one of Dave’s breakout stars Big Zuu star in Sneakerhead, a sitcom set in a sports shop shining a light on young working life in Britain.

- The Island, Dave
- The Real Dirty Dancing, E4
- The Lazarus Project, Sky
- Then You Run, Sky
- Sneakerheads, Dave



Joe Thomas leads an ensemble cast in We Are Not Alone, a feature length scripted comedy set six weeks after an alien invasion, written by and starring Ghosts’ Laurence Rickard and Ben Willbond.

‘We often say at UKTV we are all about TV with personality,’ says Dave Channel Director Cherie Cunningham. ‘We are a brand that is all about bringing a bit of levity to quite a complex, messy, awkward life that we all live... bringing a fresh fix of funny every day. It helps set us out from the crowd.’

**“We often say at UKTV we are all about TV with personality”**

**Cherie Cunningham**  
Channel Director, Dave



Jamie Morris, Director of Programmes, Sky UK and Ireland, says younger viewers are more selective but also more engaged in the programmes that they watch.

**“It’s not lean-back television to this audience. TV is actually a really important part [of their lives]. They watch less but when they do watch, it’s more valuable time.”**

**Jamie Morris**

Director of Programmes, Sky UK and Ireland



‘They are really discerning and very sure of what they like but when they find that piece of content that they love, they are very highly engaged with it,’ says Morris. ‘It’s not lean-back television to this audience. TV is actually a really important part [of their lives]. They watch less but when they do watch, it’s more valuable time.’

Upcoming Sky shows include The Rising, the first series produced entirely in-house by Sky Studios, a supernatural drama starring Clara Rugaard as a woman who discovers that she is dead and embarks on a journey to find her killer.

Pappa Essiedu stars in The Lazarus Project, an action thriller about a secret team of agents who prevent global catastrophe by resetting time.



Another new drama, And Then You Run, based on Zoran Drvenkar’s novel You, follows a group of rebellious London teenagers on a summer break in Rotterdam who unwittingly find themselves with five kilos of heroin and a gun in their luggage fleeing some of the most dangerous people in Europe.

‘We need to ensure we are representing the younger audience on screen,’ says Morris. ‘It’s about getting those high-quality shows in front of audiences in the right way, making sure they are available to stream and always available so people can watch on their own terms.’







# Celebrating creativity



# The Thinkboxes 2021

## And the winners were...

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.

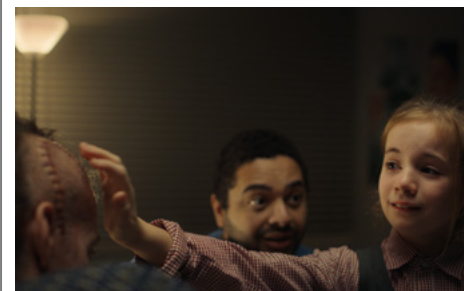


We can bang on about reach curves, shifting viewing behaviours, spending trends and measurement as much as we like (and we will, trust us). But, in the end, nothing matters more than creativity. Take that out of advertising and we may as well give up. Thankfully, the UK continues to boast the greatest advertising creativity on the planet, and The Thinkboxes exist to honour both it and those ultimately responsible for putting it on our screens – the clients who invest in TV creativity. The winners are chosen by our Academy of award-winning creatives, and they had plenty to choose from in the last year...

### January/February 'Whatever It Takes' Macmillan Cancer Support

**Client:** Jo Juber  
**Agency:** AMV BBDO  
**Director:** Jonathan Alric  
**Creative Team:** Andy Clough, Rich McGrann, Benjamin Polkinghorne, Scott Kelly  
**Production Company:** Iconoclast

The task was set for Macmillan Cancer Support and AMV BBDO to change the perception of the charity's professionals. In addition to them being well known as compassionate, they also wanted to be seen as ferocious. Following its TV debut, with almost immediate success, the charity received an increase in donations as well as positive reception from people living with cancer and Macmillan's cancer support professionals.



"The ultimate thumbs up is how positively the campaign has been received by people living with cancer and our incredible network of cancer support professionals. None of this would have been possible without their stories."

**Jo Juber,**  
Former Head of Brand  
Macmillan Cancer Support



"At a time when people living with cancer could feel out-of, and donations were negatively impacted by cancer becoming the 'forgotten c', we needed to reach as many people as possible through the type of emotional storytelling that is best achieved with TV."

**Tom White,**  
Chief Strategy Officer,  
AMV BBDO



### March/April 'It's ON: Hula' Lucozade Energy

**Client:** Zoe Trimble  
**Agency:** adam&eveDDB  
**Director:** Max Weiland  
**Creative Team:** Selma Ahmed, Genevieve Gransden  
**Production Company:** Somesuch

Swaggering its way onto our screens as he's walking through his neighbourhood to Ini Kamoze's iconic track Here Comes The Hotstepper, the cool hula-hooping guy is ultra-relaxed and powered by the bottle he has just consumed, not missing a beat – or dropping his hoop – and showcasing that positive energy of Lucozade. The message: when you're on, it's on.



"We needed a creative route that brought [the idea] to life for our consumers and there's no better place to do that than on TV. Not only does it help us to drive reach, but TV also encourages conversation and engagement online, helping us to spread the positive energy we're trying to convey even further."

**Zoe Trimble**  
Head of Marketing  
– Lucozade Energy,  
Suntory Beverage  
& Food GB&I



"We wanted to create something that made people feel good and made them smile. A simple way to bring to life Lucozade's positive energy and show what it feels like to be at your best."

**Genevieve Gransden,**  
**Selma Ahmed,**  
Creative Director,  
adam&eveDDB



### May/June 'Welcome back' Guinness

**Client:** Neil Shah  
**Agency:** AMV BBDO  
**Director:** Chris Balmond  
**Creative Team:** Jack Watts & James Cambridge; Nicholas Hulley & Nadja Lossgott  
**Production Company:** Outsider

Stoking anticipation with a cheeky, creative nod to the Guinness pint's recognisable silhouette in everyday situations, the ad unleashed the emotions of people missing a pint of the black stuff, a celebration of the re-opening of hospitality and a return to the pubs for a pint of Guinness with friends.



"After the first lockdown in the UK, what we discovered from social listening and speaking to our customers is that Guinness was the most anticipated pint when lockdowns ended."

**Nicholas Hulley**  
Chief Creative  
Officer, AMV BBDO



"TV is a critical part of our broader media mix, helping us drive reach, frequency and impact. Plus, Guinness has a real legacy of TV advertising with people genuinely looking forward to our spots."

**Neil Shah**  
Head of Guinness  
GB, Diageo



**July/August**  
**'Super. Human.'**  
**Channel 4**

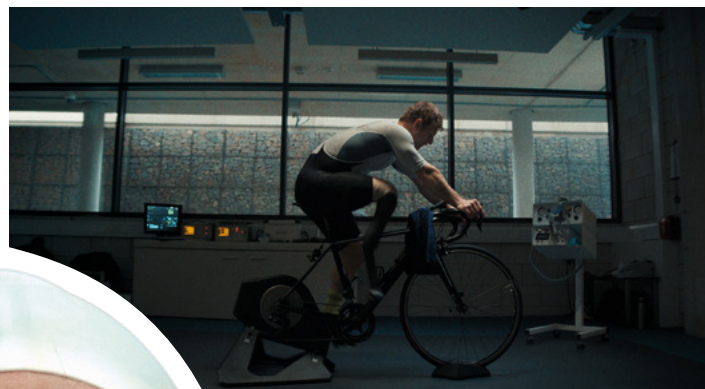
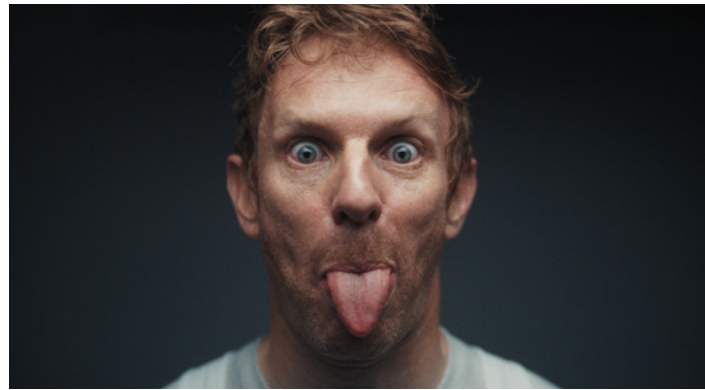
**Client:** Channel 4  
**Agency:** 4Creative  
**Director:** Bradford Young  
**Creative Team:** Lynsey Atkin, Eoin McLaughlin, Andy Shrubsole and Scott Taylor  
**Production Company:** Somesuch

With the bar set incredibly high from the legacy of two previous successful ads in the 'superhuman' strategy, this iteration to promote the 2020 Tokyo Paralympics on Channel 4 focused on the 'human' part of the 'Super. Human.'



"Across the board disability is under-represented on our screens. So even if we can shift the perception of disability a small amount, then TV is doing an important job."

**Scott Taylor**  
Creative, 4Creative



**September/October**  
**'Every home should be a haven' IKEA**

**Client:** Kemi Anthony  
**Agency:** Mother London  
**Director:** Tom Noakes  
**Creative Team:** Mother London  
**Production Company:** Prettybird

The brief was to set out IKEA's "democratic mission: to make every home a haven". It's predicated on the belief that, no matter where you live, home should be a place where you feel safe, happy and protected, free from the distractions of everyday life. Whether that's work trying to take over your downtime or the stresses you bring home from your day.



"After a sombre year of being stuck inside, we wanted to show an alternative side to life at home. And I often think nothing cuts through that quicker than playing poker with a gang of 3ft high, super ripped, super sexy teddy bears."

**Nick Hallbery**  
Creative Director, Mother



**November/December**  
**'An Unlikely Friendship'**  
**Amazon Prime Video**

**Client:** Helen Cowley  
**Agency:** CYW  
**Director:** Chris Balmond  
**Creative team:** Carmelo Rodríguez and Willy Lomana; Lucas Siewert, Marta Horcajo, Eva Fernández; Xuan Pham (Prime Video)  
**Production Company:** Blur

Amazon Prime Video's cinematic ad created a TV hit with "An Unlikely Friendship" which is the tale of an unexpected bond, forged through a shared love for entertainment, between two misfits: Hattie, a bullied hyena who can't smile, and Carl, a grumpy zookeeper who can't find any reasons to smile.



"TV is still a very relevant medium, even more around Christmas time as it traditionally brings families together. Our approach for this campaign was to make a short film, highly crafted and cinematic. There was no doubt for us that big TV screens would provide the right viewing experience for more enjoyment."

**Xuan Pham**  
Senior Creative Director Europe, Amazon Prime Video





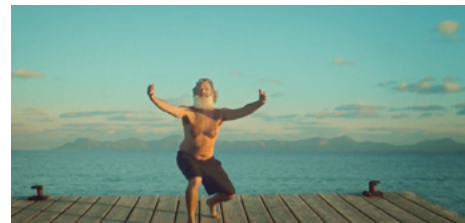
# More TV brilliance from **The Thinkboxes**

While the winners scooped the awards, we shouldn't forget the brilliant shortlists they came from. Take a look at the wonderful work that was judged by our Thinkbox Academy. Here are all our silver medal winners...

## January/February



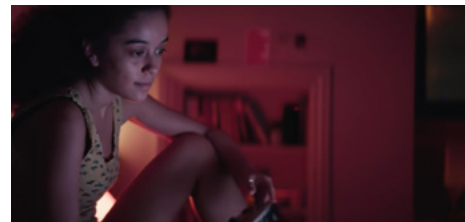
**Halifax 'It's a People Thing'**  
New Commercial Arts Agency



**On The Beach 'Someday'**  
Uncommon

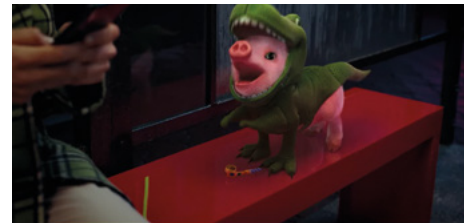


**Quickbooks 'We Mean Business for Your Business'**  
Wieden+Kennedy



**Virgin Media, 'Faster Brings Us Closer'**  
adam&eveDDB

## March/April



**Moonpig 'It Must Be A Moonpig'**  
Creature



**Rightmove 'The Renter'**  
Fold7



**Taylor of Harrogate 'What If Everything Was This Simple?'**  
Lucky Generals

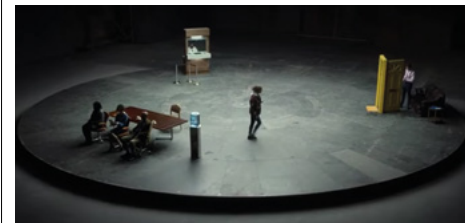


**Tesco Mobile 'Supermarket Mobile'**  
BBH

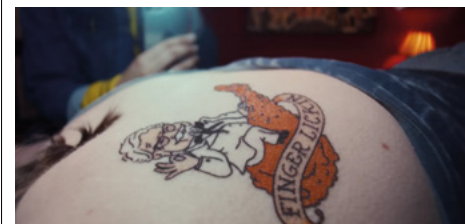
## May/June



**EA Sports FIFA21 'Inspiring the next generation of footballers'**  
adam&eveDDB



**HSBC UK 'Vicious Circle'**  
Wunderman Thompson

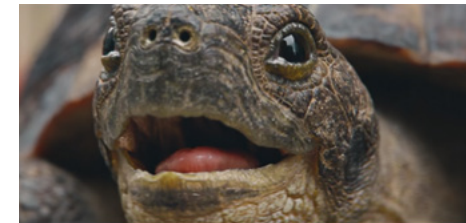


**KFC 'Love You Too'**  
Mother



**Ladbrokes 'Drummers'**  
Neverland

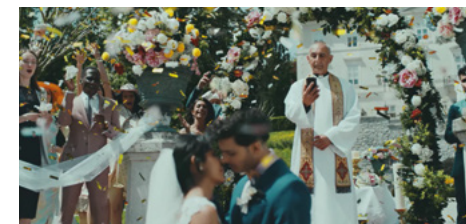
## July/August



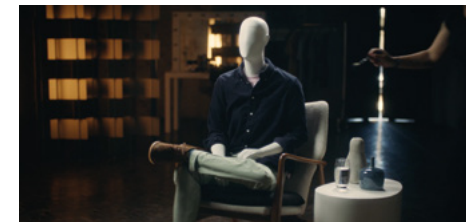
**Avanti West Coast 'Feel Good Travel'**  
adam&eveDDB



**International Paralympic Committee '#WeThe15'**  
adam&eveDDB



**LiveScore 'More than a score'**  
Wonderhood Studios

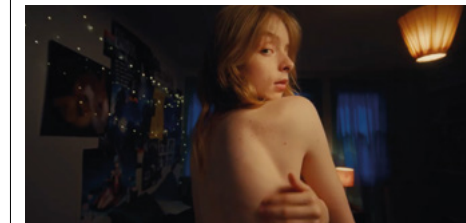


**Spoke 'Jack the not so standard mannequin'**  
Mother

## September/October



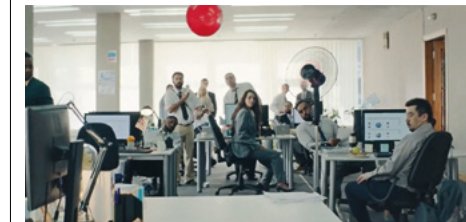
**Bisto 'Sticking Together'**  
McCann



**CoppaFeel! 'Know Yourself'**  
Fold7



**Dunelm 'Dun Your Way'**  
Creature

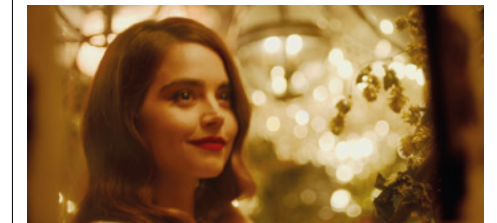


**Ladbrokes 'Balloon'**  
Neverland

## November/December



**Aldi 'A Christmas Carrot'**  
McCann



**Boots: 'Bags of Joy'**  
VMLY&R



**John Lewis & Partners 'Unexpected Guest'**  
adam&eveDDB



**Lidl 'Big on a Christmas you can ALWAYS believe in'**  
Karmarama



# Bring on the technicolour!

Creative Salon's **Claire Beale** with a clarion call for the most important thing in advertising: creativity.



There's a scene in Kenneth Branagh's Oscar-winning Belfast where the film's young hero, Buddy, is taken to the cinema to see the 1968 musical fantasy Chitty Chitty Bang Bang. Branagh's movie is beautifully, brutally monochrome but the CCBB clip appears in its original glorious technicolour, flooding the screen with warmth and transporting the Belfast audience – and the audience watching Belfast – to a happier, sunnier place.

“It's 2022 and hell, it's time to bring on the technicolour. And all bets are on creativity to help take us all to a happier, sunnier, more colourful place.”

Well it's 2022 and hell, it's time to bring on the technicolour. And all bets are on creativity to help take us all to a happier, sunnier, more colourful place.

Let's be clear: commercial creativity hasn't taken a holiday for the last two years. In fact, considering the production constraints, the challenges of remote working, a talent shortage and the unprecedented shift in consumer behaviour, creativity has absolutely thrived.

I was a judge at this year's British Arrows awards and watched two years' worth of the best audio visual efforts of the British

ad industry. So much of the work was phenomenal. And it immediately made me want to grab the industry by the collars and demand more kick-ass confidence, more pride in the standard of work here, more premium price tags for such transformative creative firepower.

British commercial creativity has triumphed amidst COVID adversity, with work that has sensitively reflected the national mood, helped brands adapt swiftly to the sudden wholesale shift in spending patterns online, and underpinned marketers' purpose agendas.

But after a couple of monochrome years of loss and isolation, we are ready for a return to humour, joy and warm human connections. And for marketers seeking long-term brand-building solutions, that means permission to use creativity to be more expansive and playful with audiences.

In his new book Look Out, Orlando Wood makes the case for a new era of creativity that celebrates human interactions, that fuels positivity and brings joy. “In a world full of fear, anxiety and detachment, now more than ever we need advertising with wit and charm, with human vitality, advertising that entertains,” Wood says. “We need to 'look out' because audiences turn away from advertising that looks inwards, we need to create a spectacle that opens the eyes and warms the heart of those we wish to persuade.”

“In a world full of fear, anxiety and detachment, now more than ever we need advertising with wit and charm, with human vitality, advertising that entertains.”

**Orlando Wood**  
Chief Innovation Officer,  
System1 and author of Look Out

Even before the pandemic hit, Wood argues we were already withdrawing, turning inwards, as personalised screens began to disrupt the public sphere on an industrial scale. Over the past decade or so we've become increasingly detached from the world around us and as we hyper focus on our phones we have lost something of culture's vitality.

And personalised, activation-orientated advertising has surged as a result.

This trend has not been particularly creatively fruitful. Direct, highly targeted, personalised advertising – fuelled by data and science – doesn't often hit the creative highs that touch emotions, drive long-term effectiveness and build customer loyalty across the years.

Instead it is creativity that takes a broader focus, appealing more to our right-brain emotional receptors, that can achieve lasting business effects. Research suggests that the most effective brand-building advertising will be the work that delights and entertains, that helps lift us out of the gloom and makes the world seem a more connected, friendly place. This is the advertising that will drive profits, share gains, salience, fame, trust and esteem for a brand.

I hate the idea that there's any sort of formula for creative excellence; creativity is a magical, alchemical, rule-breaking process that often defies logic... and pre-testing. But Wood makes some sound observations about the ingredients of what he calls “broad-beam” brand building work. It involves “creating advertising with an appreciation of human uniqueness, human movement, connection, with character, incident, place, with humour, with music, warmth and colour,” he says.

And it's why TV offers advertisers such a rich creative canvas. Chaka Sobhani, the Global Chief Creative Officer of Leo Burnett and a Former Creative Director at ITV, is a passionate fan of television and of the populist advertising that thrives on the medium. “Creativity, in all its forms, has always been about the pursuit of reaching and connecting with as many people as possible,” she says. “Whether a musician,

“Creativity, in all its forms, has always been about the pursuit of reaching and connecting with as many people as possible.”

**Chaka Sobhani**  
Global Chief Creative  
Officer, Leo Burnett



an artist or an advertiser we are all driven by moving people en masse, to feel something collectively and individually. TV still enables us to do this in both incredibly creative and effective ways.”

Moving people en masse to feel something is the essence of TV's power to fuel brand growth. As Harjot Singh, the Global Strategy Director of McCann, put it: “We are constantly being advertised to. But not all of it gets our attention always. When it does, it is because we have found something so compelling that it has drawn us in; an attraction too irresistible to ignore, a distraction too thrilling to dismiss. A reward for your attention; it lingers. Television has the capacity to create that magic on many levels.”

For Singh, TV still offers advertisers a transformational creative canvas exactly because of its ability to connect people and to connect us with the culture around us: exactly what Orlando Wood's research has identified

as so vital. “It's not just that the duration of the impact of TV advertising is proven to be longer,” Singh says. “Or because TV still makes up the majority of the average person's day in video content. Or because it promises scale and immediacy at once. But it's because TV allows us to be visually romanced and persuaded in a very primal way. TV is a shared experience instantly. It's a bit like looking at the moon. One is never alone in doing so. There are millions of other people seeing the same advertising as you and possibly at that very same time, allowing brands to effectively land in culture by drawing from culture.”

“TV allows us to be visually romanced and persuaded in a very primal way.”

**Harjot Singh**  
Global Strategy  
Director of McCann



I really love that idea that the shared experience of TV advertising is like looking at the moon. But please can we see it in technicolour this year?

Amazon Prime Video







# Inspiring insights



# The TV playbook for online business

As more and more online businesses look to TV to take them to the next level of growth, this pioneering study by Magic Numbers of 10 online brands with proven TV success offered guidance on when and why to use TV – and what to expect

**Why this was needed**

In 2021, online-born businesses invested £1.12 billion in TV advertising in the UK. They're now the biggest category of advertiser on TV (see page 12).

To better understand the boom in online brands on TV, Thinkbox commissioned a new econometric analysis of 10 online businesses that are proven to have used TV advertising to drive their growth (the brands involved in the study are anonymised).

We also drew on the wisdom of some brilliant marketers who have used TV advertising to drive the growth of online brands.

Here's an overview of the findings, principles and insights we discovered...



Hotels.com, Siege

## 3 signs it's time for TV

- 1. When a brand needs to scale first and fast**

For example, the study features a second-hand online car dealership that reached 500,000 visits per week in five months after scaling up its TV spend.
- 2. When understanding a brand's proposition makes people more likely to buy**

A home gym equipment business with a brand-new proposition used TV to reach 200,000 visits per week at a cost per visit 300 times lower than their hero product's cost.
- 3. When a brand runs out of efficient online buys**

A dieting brand had a peak weekly web traffic of 111,000 visitors and an average of 23,300 prior to trialling TV. Following their TV launch, the peak rose to 378,000 visitors and the average increased to 99,000 visitors.

“Unless you land two or three points that explain your product, you're not really going to get people to come to the website with the right level of intent in the first place. And it's hard to deliver those three messages outside of TV.”

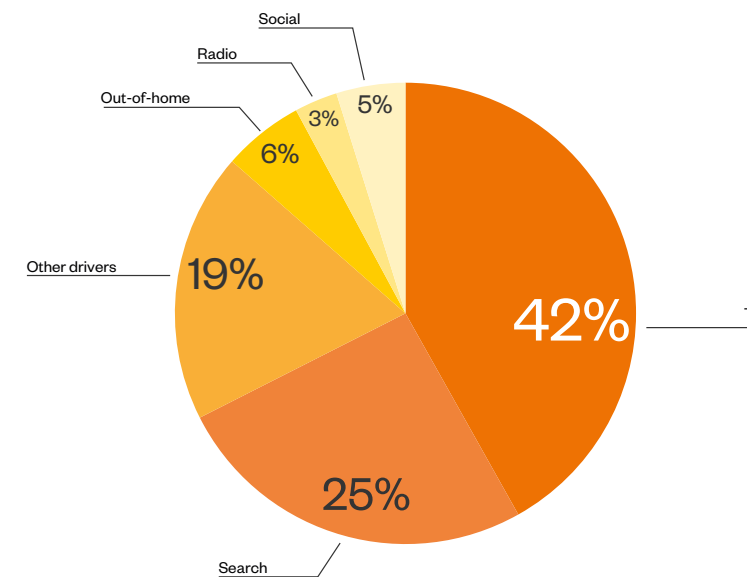


**Lucas Bergmans**  
Group Brand Director, Cazoo

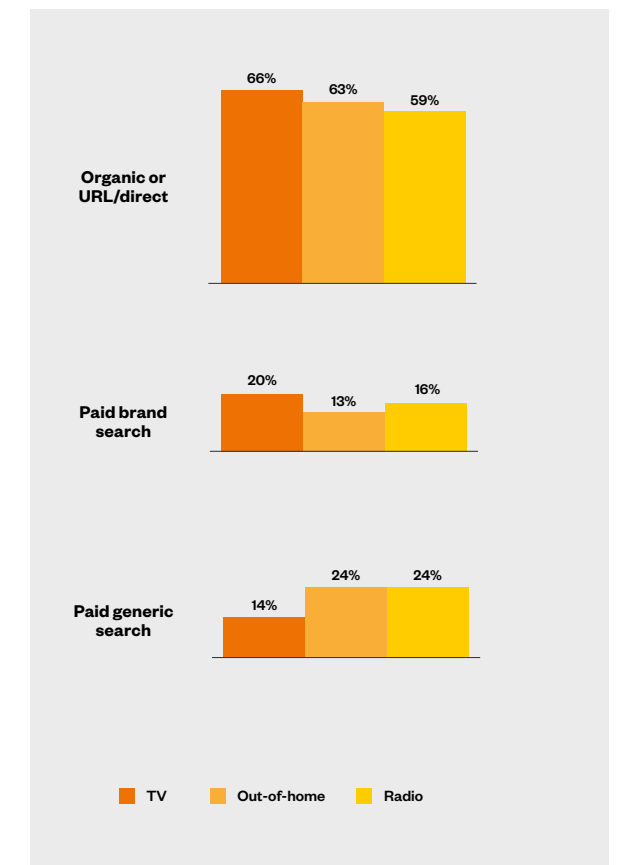
## 86% of online journeys prompted by TV involve the brand name

TV makes search work harder. The study found that TV advertising drives cheaper online journeys because it prompts people to go to the brand website directly (which carries no additional cost to the advertiser) or to search for the brand specifically rather than just the category, which costs less.

Breakdown of web visits by driver



The journeys initiated by ATL channel



Source: Magic Numbers, The TV playbook for online businesses (2021)



# TV drove 42% of all visits

That's 50 million in total across the 10 brands modelled. TV creates an immediate, visible response and many of the marketers interviewed for the study described enjoying watching the impact on Google Analytics as their TV spots aired.

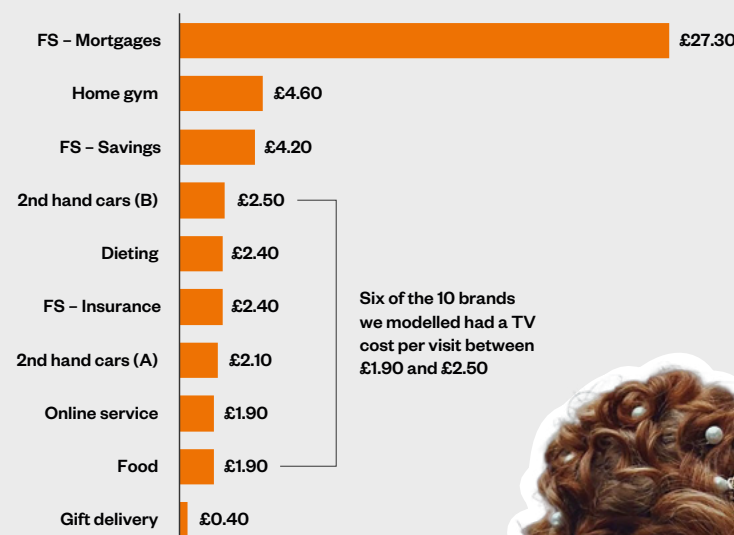


# Cost per visit was £1.90-£2.50 for 6 of our 10 brands

**This is a pretty good benchmark to use in planning**

Across the 10 brands analysed, TV drove 50 million visits at an average cost per visit of £2.11 – a cost comparable with search. Six of the 10 brands the study modelled had a TV cost per visit between £1.90 and £2.50. Generic search costs are hugely variable but a typical cost per visit in, for example, gift delivery is £1-£3, and in financial services is £5-£11.

TV cost per visit by brand in the modelling



**£1.90-£2.50 is a good benchmark, but there is variation. For example:**

- Complex financial product
- Simple D2C highly optimised

**Compares favourably to generic search cost**

- e.g. gift delivery £1-3
- e.g. financial services £5-11

Source: Magic Numbers, The TV playbook for online businesses (2021), Google Ads, FS - Financial Services

- eve, #wakeupdancing
- Gusto, Give It Some
- TikTok, Entertainment through the ages



# 50% of sales in 14 weeks

TV creates a layer of base sales to rely on and a brand that's a saleable asset. Brand-focused TV advertising – alongside OOH – was found to have the longest-lasting sales effects with 50% of sales seen in the first 14 weeks following activity and 50% seen in the remaining two years afterwards.



## Marketers involved in the study

**Tom Beardmore**  
Founder, Chamber

**Lucas Bergmans**  
Group Brand Director, Cazoo

**Cheryl Calverley**  
CEO, eve sleep

**Xabi Izaguirre**  
Former Head of Marketing, Parcel Monkey

**Abba Newbery**  
CMO, Habito

**Chris Seigal**  
Senior Director, Direct to Consumer, Harry's

**Simon Wilden**  
Partner, Goodstuff

“

The only way we're going to get out of this trap of having to keep pushing money in, of 60% of our sales being driven by marketing, is by generating underlying brand awareness, underlying brand strength. The long-term strategic play is that base sales layer to fall back on.”



**Cheryl Calverley**  
CEO, eve sleep

## Methodology

**Econometric analysis across three years of 10 online businesses that have successfully used TV to drive growth**

- Over 120m website visits
- £106m of spending on TV
- 30 years of advertising experience

“

Even though many online-born businesses are now big, most aren't yet fully comfortable with big-brand marketing strategies like TV. This study provides the blueprint for success.”



**Dr Grace Kite**  
Founder of Magic Numbers



# CFlight is ready for take off

## Andrew McIntosh

**CFlight Project Manager & Independent Media Consultant**



There are many inspiring future-gazing quotes. “Wouldn’t it be great to combine linear TV impacts and video on demand impressions into one over-arching, de-duplicated campaign coverage metric?” is a cracker that will eventually be ascribed to Oscar Wilde or Rory Sutherland presumably, but the sentiment has a lot of media agency support behind it.

CFlight, the UK’s new metric matching that description, has gone from academic concept to post-pandemic construct in two years. Thinkbox has played its part, helping 11 organisations and 50+ people to collaborate on the post-campaign evaluation tool which is rolling out across UK agencies from mid-March.

### A world first

To our knowledge, CFlight is the first linear TV and BVOD measurement system in the world of this sophistication and scale, building on the original concept launched by NBCU in the US in 2018. The UK version, brought here and shared by Sky, includes virtually all of the nation’s broadcasters, platforms, channels, players and devices. It combines BARB-measured impacts with ad-served VOD impressions to show TV and AV buyers what the overall reach and frequency figures are for the campaigns they’ve bought.

The launch version is a free-to-use, base-level tool giving unique insights into total TV campaign cover. It reports on the All Adult audience, and eligible users (i.e. those who have recently bought linear or VOD airtime from Sky Media, ITV Media, 4 Sales or STV) can select multiple brands and clock numbers if they wish to combine them. Access requests can be made via [CFlight.co.uk](http://CFlight.co.uk) or [Thinkbox.tv](http://Thinkbox.tv).

### Rigorous testing

Representatives from agencies that participate in the IPA’s Television Research Advisory Group have undertaken user testing. Their feedback has informed current and future aspects of the portal including its design, functionality and reports. Final checks and validations have been conducted by the architects, RSMB, and processors, TechEdge, in the run-up to full market roll-out.

### Early results show promise

The data, so far, reveals a tantalising part of a bigger picture. Many test campaigns have

been run, with most showing a low single-figure uplift in Adult audience reach by using VOD as well as linear activity. However, we know that those campaigns weren’t necessarily targeting broad Adults, not least because on demand viewing is disproportionately popular with ABC1 and younger audiences. With this in mind, in Q4 this year CFlight will unveil its most eagerly anticipated functionality, and expand measurement to all of the main TV trading audiences.

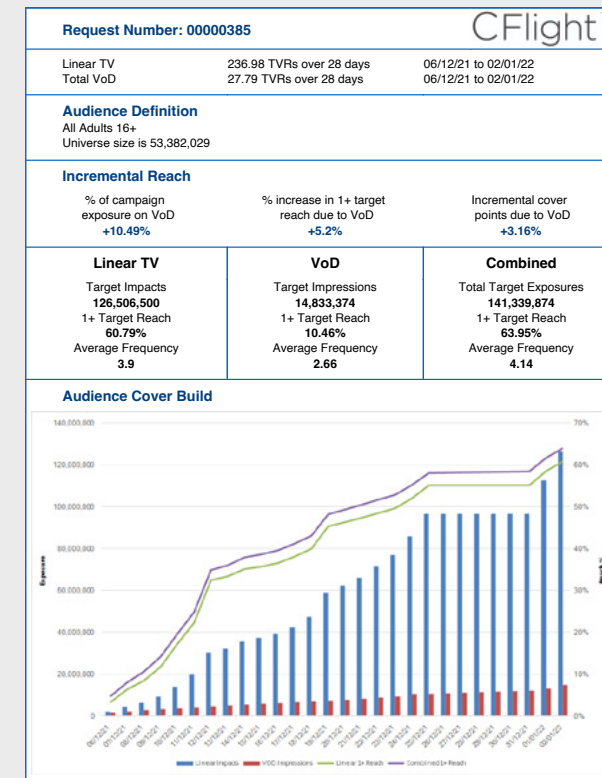
### Next phase of registrations

Prior to roll-out, Thinkbox will be in touch with the largest agencies to arrange buyers’ access to CFlight, so that registration volumes are manageable in the launch phase. Thereafter, access will be granted on a request basis subject to eligibility. Agencies can see their own campaigns but not others, so there is no critical competitive imperative to have immediate access on Day 1, but you’ll want to see how your linear and BVOD campaigns performed sooner rather than later, of course, and roll-out will occur as fast as it can be enabled.

Thinkbox and the broadcaster teams will keep you posted on progress throughout 2022 as CFlight produces new insights and unveils useful upgrades along the way.

“Indisputably, CFlight is a considerable and much-needed leap forward for the entire industry. Maybe this makes me a nerd, but I have found it really exciting to be involved in the testing stage!”

**Amy Tocock**  
Head of AV Strategy, PHD



“To be able to see the total delivered reach of AV campaigns gives us further proof points about the efficacy of holistic TV and BVOD planning, and will help to demonstrate the importance of considering the total TV landscape when we plan and buy campaigns.”

**Emily Smith**  
Media Director, AV, Wavemaker



“CFlight is the answer to what has been the perennial AV industry question; what exactly does BVOD add to a linear TV campaign? Whereas previously we had to use predictive planning tools modelled on claimed behaviour, we now have a statistically robust, post-campaign data source that has the backing of the broadcasters as well as BARB to shore up its validity. Although in its early stages, it heralds a new dawn in cross-media measurement and bodes well for the future.”

**Jon Manning**  
AV Strategy Director, Starcom Worldwide



## CFlight reports

Select a campaign duration of up to 63 days (9 weeks/2 months)

Select campaigns since 1st October 2021

Include up to 20 clock codes

Combine multiple brands from one advertiser

Reports run overnight and are returned in pdf or Excel format

### Want to try CFlight for yourself?

Access requests can be made via [CFlight.co.uk](http://CFlight.co.uk) or [Thinkbox.tv](http://Thinkbox.tv)

To be eligible to use the tool you must have recently bought linear or VOD airtime from Sky Media, ITV Media, 4 Sales or STV.



# Mastering TV

Over **10,000** people are now TV experts after experiencing TV Masters, the world's first training course in TV advertising.

An understanding of TV helps marketers at every level deliver more for their brands, get more from their media investments, and ask the right questions of their agencies or clients. Whatever the marketing discipline, TV Masters boosts critical skills and knowledge for use across the industry.

Whether you're new to TV, a marketing all-rounder, or a media expert looking for a refresher, TV Masters is essential, accessible learning. It's designed to be as useful and practical for new starters with everything to learn as it is for more experienced marketers looking to refresh their knowledge and skills.

The course is also well suited to business leaders who want to broaden their horizons and be able to ask their marketing teams and agencies some tricky questions.



- It's free
- Winter, summer & autumn courses
- 9 on-demand video modules
- Tests to help you learn
- Downloadable charts & additional reading
- Presented by TV experts
- Learn at your own pace
- Up to 10 weeks to complete
- Optional final exam to earn distinction
- CPD certified and IPA CPD hours eligible

## Graduate feedback

“Comprehensive and engaging”

TUI Group Brand and Content Director

“An excellent learning experience”

Publicis AV Investment Manager

“Already put my learnings into practice”

Unilever Senior Brand Manager

95%

would recommend it to a colleague

“Incredibly thorough content that covers all aspects of TV advertising, and there's some great slides you can steal too!”

Wavemaker Planning Director

97%

rated it good or excellent

### Get involved

The team at Thinkbox is on hand to help you and your team at every step along the way.

Get in touch if you have any questions about the course before starting your TV Masters journey and becoming a TV advertising expert in just 10 weeks.



Drop an email to the TV Masters team at Thinkbox on [tvmasters@thinkbox.tv](mailto:tvmasters@thinkbox.tv) or enrol for TV Masters directly at [tvmasters.thinkbox.tv](https://tvmasters.thinkbox.tv)

### Our 2022 courses

**Summer 2022**  
Monday 23rd May to Monday 1st August

**Autumn 2022**  
Monday 12th September to Monday 21st November