

THINKBOX

A YEAR IN TV

ANNUAL REVIEW 2017-18





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Who we are

Who we are

Thinkbox's role is to help advertisers get the best out of today's TV by proving its supreme effectiveness and helping them navigate the developing technologies contributing to TV's exciting future.

Thinkbox is the marketing body for commercial TV in the UK. We are owned by Channel 4, ITV, Sky Media, UKTV and Turner, but are supported by all UK commercial broadcasters, representing over 99% of TV advertising.

We are also proud to have many Associate Members both in the UK and abroad. These are Discovery Networks Norway, Disney, TAM Ireland, Think TV (Australia), thinktv (Canada), TVN (Poland), TV Globo (Brazil), TV 2 (Norway), TV 2 (Denmark), DStv (South Africa) and Virgin Media. Discovery Networks UK & Ireland, and STV also give direct financial support.

TV and TV advertising shape popular culture. We are living in The Age of Television where the standard, variety and popularity of the shows that broadcasters invest in create an environment for brands that is second to none.

TV has more to offer advertisers than ever before. As viewers embrace new forms of TV, the targeting capabilities and data-richness of the online world are blending with the high-quality, highly trusted world of TV with its huge reach. TV now has the best of both worlds for advertisers. ■



01



02



03



05



04

- 01 Britain's Got Talent, ITV
- 02 Joshua vs Klitschko, Sky Sports Box Office
- 03 Murder on the Blackpool Express, Gold
- 04 Ben 10, Cartoon Network
- 05 The Handmaid's Tale, Channel 4

Welcome from Lindsey Clay

This is a brand-safe publication.
100% viewable and not a bot in sight.
You can trust the content you are
about to associate with.



LINDSEY CLAY
Chief Executive, Thinkbox

Where was I? In last year's 'A Year in TV' I ended my welcome like this:

"With the ugly revelations about Facebook's inflated video metrics and other murky misdoings online, marketers are demanding and deserve better."

Well that went well.

2017 was again something of an annus horribilis for parts of online advertising. More on that in a moment, but first let's focus on TV.

One consequence of the online omni-fiasco is that TV's strengths and unique assets have been thrown into even sharper relief. You can read all about these strengths in the coming pages, from the latest effectiveness research by Ebiquity and Gain Theory ('Profit Ability' on p. 26), to the immense variety and quality of the broadcasters' investment in programming (courtesy of Lisa Campbell on p. 42), to the latest examples of brands using TV in innovative and surprising ways (p. 36).

If TV in 2018 has a theme, it is collaboration. There is a renewed spirit of partnership among broadcasters both within countries and between countries. The TV industry is working together more than ever to tell its amazing story. At an international level, we've seen the formation of the Global TV Group to give TV a global, unified voice (see p. 52). In the UK, the main TV sales houses of Channel 4, ITV and Sky are publicly committed to exploring ways in which they can combine to make it easier for advertisers to get the most out of TV, be that joint research, joint events like The Big TV Festival, or joint technology initiatives.

And we have plenty of data in here to share with you. TV viewing is changing and we look at exactly how on page 12 with all the facts and figures you need to know. At 3 hours, 23 minutes a day, TV remains the bulk of our video diet and our latest video viewing analysis is on page 18, including a breakdown of how much video advertising people are seeing (spoiler alert: TV accounts for 95%).

TV advertising revenue in 2017 was dampened by the ongoing economic uncertainty, down 3.2% to £5.11 billion – its first year without growth for 8 years. However, the shoots of recovery are already in evidence and the pendulum is swinging back to TV advertising after a promising Q4 in which revenue was up year-on-year by approximately 2%. In 2018, TV is predicted to see a return to growth.

If you want clever opinion as well as well as cold, hard data then allow me to present the Advertising Association's Stephen Woodford on how advertising can grow beyond Brexit (p. 58) and John Plunkett looking at why TV remains such a fundamental part of younger viewers' lives (p. 46). We also have Abbott Mead Vickers BBDO's Rosie Arnold talking about how TV can make the world a better place (p. 50).

Talking of making the world a better place, briefly back to that annus horribilis. Surely we cannot continue to inhabit a world where online platforms claim to reach more people than exist, where ads appear next to inappropriate content, and advertisers are ripped off by non-human traffic. We need a policy and regulatory framework to ensure all online companies take proper responsibility and face consequences for misdemeanours. It works for TV and other media, so why not them?

Anyway, enough on that; this publication is about the positive and wonderful world of TV, so enjoy and I'll finish with a couple of grovelling yet genuine thank yous: to our amazing broadcaster shareholders who keep commercial TV at the top of its game, and to those equally amazing advertisers who invest in TV and show us how it's done – especially the 785 new or returning advertisers on TV in 2017. Thank you and have a great year. ■

- 01 This Morning, ITV
- 02 Big Little Lies, Sky Atlantic
- 03 First Dates Hotel, Channel 4
- 04 Dave Gorman: Modern Life is Goodish, Dave
- 05 Gold Rush, Discovery





If you read one bit, read this

We trust you. We have complete faith that you will read and absorb all the goodness herein contained and then discuss it at length with colleagues, friends and family. But, to help make those conversations even punchier, here are a few of the key points we'd really like you to know.

TV ADVERTISING DELIVERS LIKE NOTHING ELSE

'Profit Ability: the business case for advertising' by Ebiquity and Gain Theory found that TV outperforms all other media investments. They found that TV delivers 71% of total profit generated by advertising, at the greatest efficiency, and for the least risk (see p. 26).

TV ACCOUNTS FOR 95% OF VIDEO ADVERTISING SEEN

That's in full, with the sound (most likely) turned on and with unbeatable effectiveness. For 16 to 34-year-olds TV advertising accounts for 90%. In 2017, YouTube activity accounted for 0.9% of video advertising time for all individuals and 2.9% for 16-34s. Netflix and Amazon accounted for none (see p. 18).

TV ACCOUNTS FOR 71% OF ALL VIDEO VIEWING

In total, the average person in the UK watched 4 hours, 39 minutes a day of video in 2017 and TV accounted for almost three quarters of it, with viewers offered an unparalleled variety and quality of shows and advertisers offered a premium advertising environment (see p. 18).

THE PENDULUM IS SWINGING BACK TO TV

Although total TV advertising investment in 2017 was down due to the ongoing economic and political uncertainty, Q4 2017's performance is significant. It was the first year-on-year quarterly comparison since the impact of the Brexit referendum and it shows the shoots of regrowth, with TV spend up year-on-year by approximately 2%.

THERE WERE 785 NEW OR RETURNING ADVERTISERS ON TV IN 2017

This figure represents the number of brands who advertised on TV for the first time or returned to TV after a gap of at least five years and includes new to TV advertisers who used Sky AdSmart. Notable new or returning brands included Uber, Opodo and Sixt.

WE'RE IN THE AGE OF TELEVISION

We really are. We have more great TV than you can shake a stick at – and we include the likes of Netflix and Amazon here, which couldn't be more TV if they tried. Commercial TV in particular had another vintage year and the wonderful Lisa Campbell has a look at some of the highlights on p. 42. ■

ABOVE Love Island, ITV2



TV in numbers

TV viewing: the facts

Prepare for a tale of the standard industry definition of TV viewing and what it doesn't include. Steel yourself for the knowledge that people continue to watch tonnes of TV, especially commercial channels. React with almost no surprise when we tell you that younger audiences love TV in all its forms and that people prefer to watch TV on big screens. Yes, it's time for some up-to-date facts about TV viewing in the UK...

WE WATCH 3 HOURS, 23 MINUTES A DAY OF 'STANDARD' TV

When you see figures for TV viewing, they are usually based on the Broadcasters' Audience Research Board's (BARB) standard measurement: broadcaster programming on a TV set watched within seven days of the original broadcast either live, playback or on-demand.

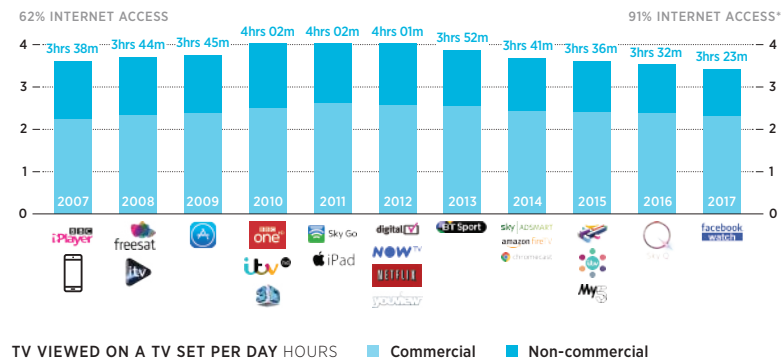
Standard TV is the bulk of TV viewing, but it only tells part of the TV viewing story, as an increasing amount is outside standard measurement. We'll give the full picture below, but for now we'll tell you that standard viewing accounted for 3 hours, 23 minutes a day (23 hours, 41 minutes a week) of the average viewer's TV consumption in 2017 - just 15 minutes a day less than 10 years ago.

TWO THIRDS IS COMMERCIAL TV VIEWING

67.5% of standard TV set viewing in 2017 was to commercial TV channels, up 0.6 percentage points on 2016. This means that the average person watched 2 hours, 17 minutes of commercial TV a day, just 5 minutes a day less than 2016 and up 1 minute on 2007.

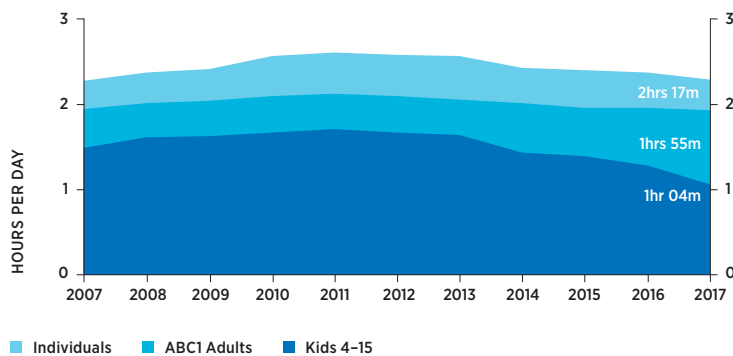
DESPITE A DECADE OF DISRUPTION, STANDARD VIEWING IS RESILIENT

Source: BARB, 2007-2017, individuals. TV set viewing within 7 days of broadcast. *Ipsos Tech tracker Q4 2017.



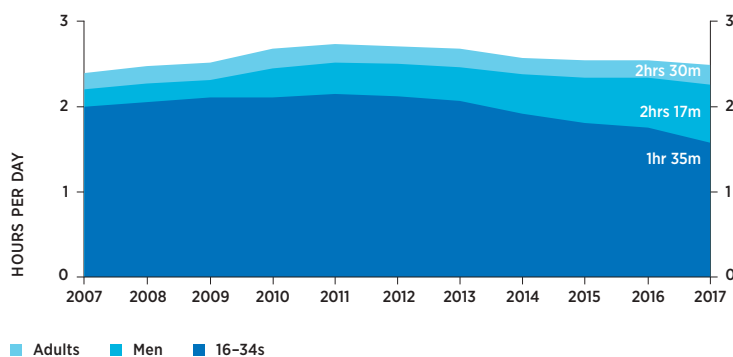
COMMERCIAL 'INDUSTRY STANDARD' TV SET VIEWING OVER TIME (INDV/ABC1 AD/KIDS)

Source: BARB, 2007-2017, industry standard commercial TV viewing in-home on a TV set.



COMMERCIAL 'INDUSTRY STANDARD' TV SET VIEWING OVER TIME (ADS/MEN/16-34)

Source: BARB, 2007-2017, industry standard commercial TV viewing in-home on a TV set.



WE WATCH 43 TV ADS A DAY

Commercial impacts have grown by 14% in the last decade. The average viewer watched 43 TV ads a day at normal speed (anything else is free to advertisers - bonus views). This is 3 ads more a day than 10 years ago and totals an average of 2.6 billion TV ads watched a day in 2017, or 942 billion across the year.

YOUNG PEOPLE LOVE TV IN ALL ITS FORMS

Younger audiences are the most enthusiastic watchers of new forms of TV and this has an impact on their TV consumption. That said, TV remains the biggest form of video in their lives, accounting for just under half of 16-34s' total video diet (see p. 18).

In 2017, 16-34s watched 2 hours, 3 minutes a day of TV on a TV set, down from 2 hours, 18 minutes in 2016; under-16s watched 1 hour, 26 minutes a day, down from 1 hour, 42 minutes. According to our analysis, 41% of 16-34s' video viewing is on devices, compared with 22% for all individuals.

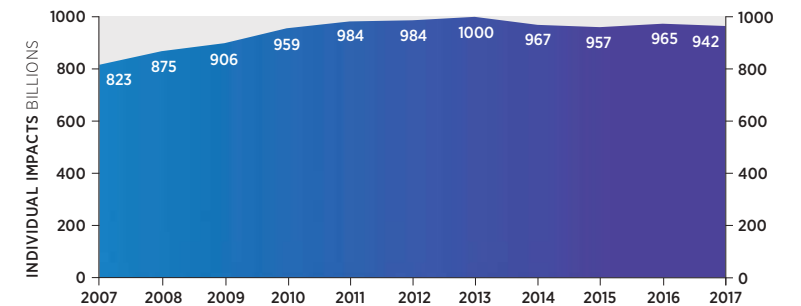
In 2018, BARB will begin to officially report on non-TV set viewing. This is a vital step as TV viewing evolves, especially younger people's viewing habits. We have been missing out on measuring the entirety of viewing. For example, if you look at the week from 3rd July to 9th July and the six episodes of ITV2's youth blockbuster Love Island that aired, an average of 2.8 million people watched live or within 7 days on a TV set. Not to be sniffed at. But this increased to 3.5 million when 'device viewing' was included, either live-streaming or on-demand.

COMMERCIAL TV REACHES 90% OF THE UK IN A WEEK

In 2007, it was 91.5%, so a story of stability. For younger audiences, it is lower, as it always has been, but the vast majority watch every week: in 2017, standard commercial TV reached 83.6% of 16-34s a week compared with 87.2% in 2007.

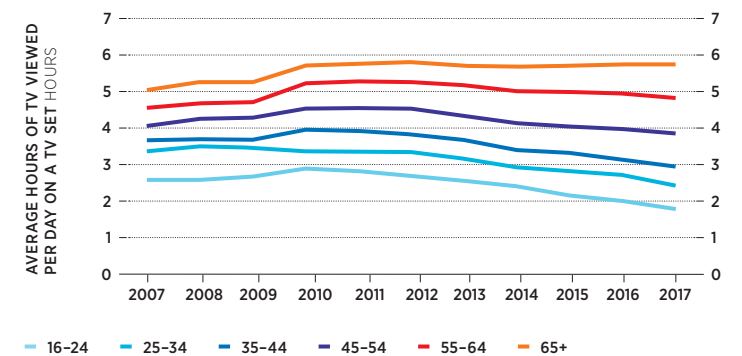
TOTAL INDIVIDUAL BROADCAST IMPACTS

Source: BARB, 2007-2017. Base: 30" reweighted impacts. An impact = one person viewing one TV ad in its entirety. Impacts only count when viewed at normal speed.



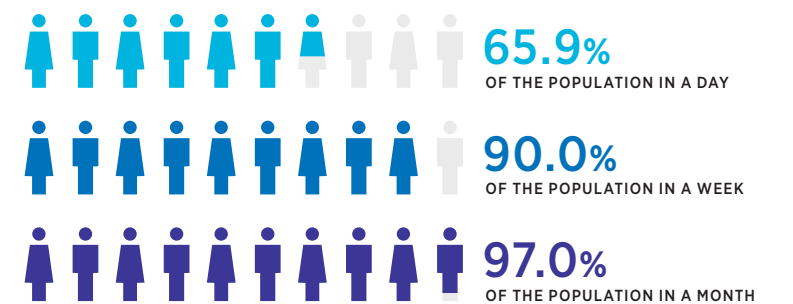
TV SET VIEWING OVER TIME BY AGE

Source: BARB, 2007-2017. TV set viewing within 7 days of broadcast.



COMMERCIAL TV HAS EXTREMELY HIGH DAILY, WEEKLY AND MONTHLY REACH

Source: BARB, 2017, individuals, reach 3 min+. TV set viewing within 7 days of broadcast.



TV viewing Continued...

LIVE TV REMAINS FUNDAMENTAL

86% of standard TV was watched live in 2017. This is the average figure for all UK households, but 39% of UK households don't have a television recorder. In those that do, 81% of TV on a TV set in 2017 was watched live, compared with 82% in 2016. If live TV didn't exist, we'd have to invent it – this is why people watch TV they have recorded so soon afterwards; they instinctively choose to stick close to the schedules.

AN ADDITIONAL 7% OF TV VIEWING FALLS OUTSIDE STANDARD MEASUREMENT

By including census level device and TV set stream data from the broadcasters together with the TV set viewing that occurs 8–28 days after broadcast (BARB reports it but doesn't include it in its standard measurement) we can estimate total time spent watching broadcaster TV content for the average viewer at 3 hours, 38 minutes, compared to the standard measurement of 3 hours, 23 minutes. This means some 7% of TV viewing currently falls outside the standard BARB measurement.

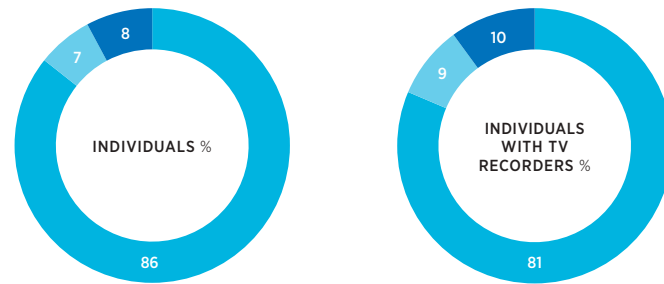
Among 16–34s the amount of additional viewing on top of standard measurement increases to 15% meaning their total TV consumption is in fact 2 hours, 21 minutes, compared to the standard measurement of 2 hours, 25 minutes.

98% OF TV IS WATCHED ON... THE TV

Hope you were sitting down for that. Yes, other TV screens like tablets and smartphones are a brilliant and much appreciated way to watch TV, but they are most often a compromise; they're there when a big screen isn't. Quite understandably, people will always want to watch on the best screen available and 98% of the TV the average viewer watched in 2017 was on a TV set. ■

THE MAJORITY OF INDUSTRY STANDARD TV SET VIEWING IS LIVE

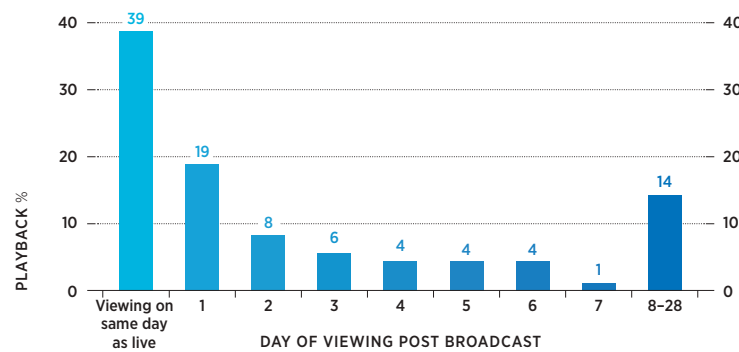
Source: BARB, 2017, individuals; individuals in TV recorder homes. TV set viewing within 7 days of broadcast.



■ Live ■ Viewed on the same day as live (VOSDAL) ■ Time-shifted viewing within 7 days

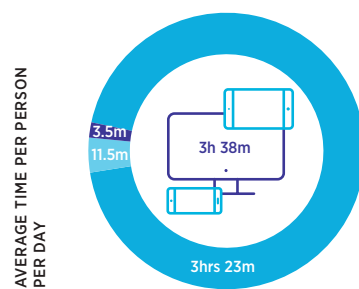
PEOPLE PLAYBACK PROMPTLY: 58% WITHIN TWO DAYS

Source: BARB, 2017. All playback on a TV set 0–28 days post broadcast, individuals.



THERE'S AN ADDITIONAL 7% OF TV VIEWING ON TOP OF 'INDUSTRY STANDARD'

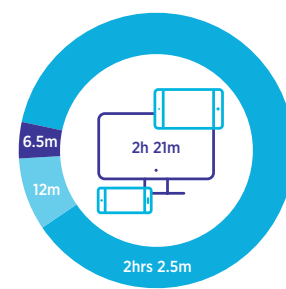
Source: BARB and UK broadcaster data, 2017, individuals.



■ Industry standard TV set viewing ■ Additional TV set viewing ■ Additional viewing on other devices

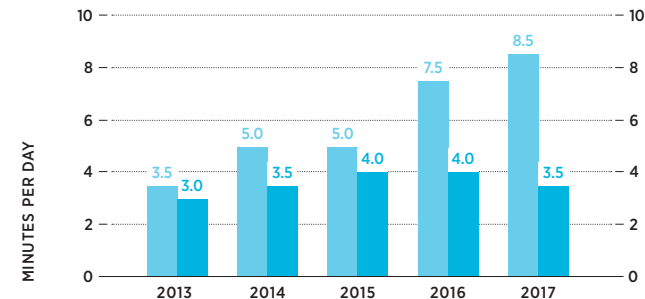
THERE'S AN ADDITIONAL 15% OF TV VIEWING ON TOP OF 'INDUSTRY STANDARD' FOR 16–34s

Source: BARB and UK broadcaster data, 2017, 16–34.



BROADCASTER VOD VIEWING IS SHIFTING FURTHER TO THE TV SET

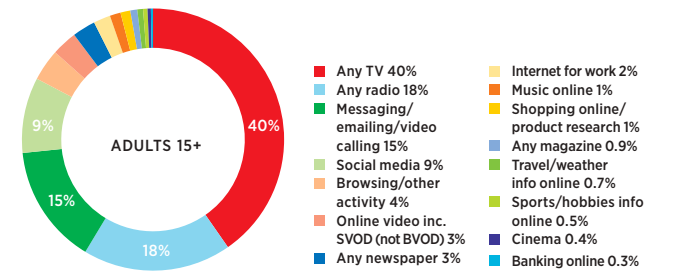
Source: UK broadcaster data, Individuals.



■ TV Set BVOD ■ Device BVOD

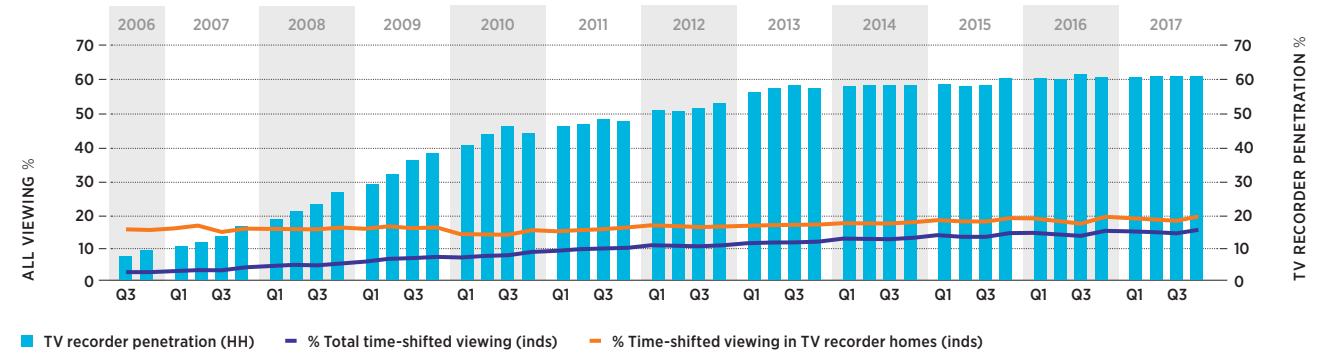
TV ACCOUNTS FOR 40% OF ADULTS' CHOSEN MEDIA DAY

Source: Touchpoints 2017, IPA. Base: Adults 15+. Includes only media which people choose to consume. TV, radio, newspaper and magazine figures include online/app consumption.



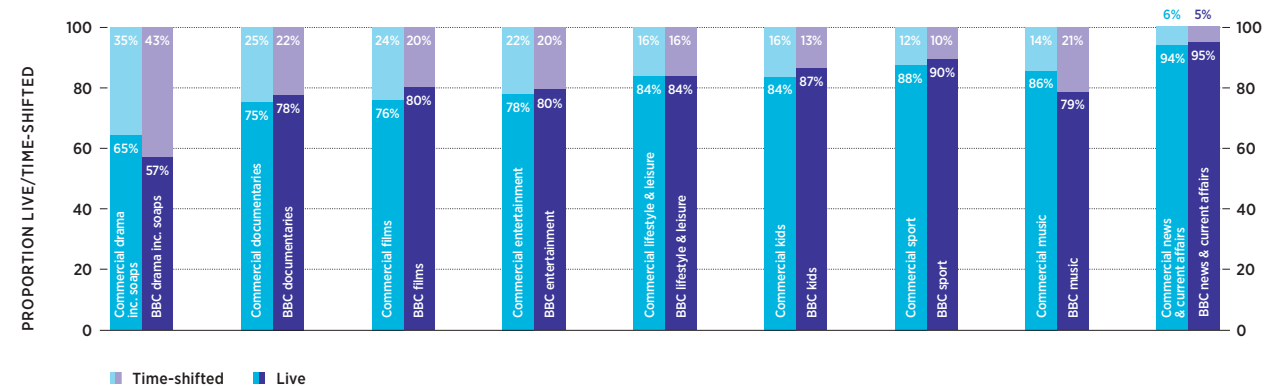
TIME-SHIFTED VIEWING STABLE IN TV RECORDER HOMES

Source: Sky – 10 Years of Sky Plus (Q3 2006–Q3 2010) and BARB Establishment Survey (Q4 2010 onwards). Q4 2017 TV recorder penetration Thinkbox estimate.



TIME-SHIFTING IS DRIVEN BY PROGRAMME GENRE NOT AD AVOIDANCE

Source: BARB, 2017, individuals in TV recorder homes, commercial TV vs BBC. TV set viewing within 7 days of broadcast.



How broadcaster VOD keeps TV reaching further

There is now industry standard proof that television's reach hasn't changed in the last 10 years – but, to make the most of it, marketers need to plan across both TV and broadcaster VOD, writes Thinkbox's Matt Hill.

Reach has always been one of TV advertising's trump cards. Broad reach creates fame and that builds brand desirability.

No-one can truly predict who might end up a customer and to succeed in marketing you can't simply speak to those who are in market; our emotions drive our decisions and, as a result, we need to be warm towards a brand for our activation media to work. If the first time you see a Mercedes ad is in your 50s, it's too late.

That's why the term 'wastage' is such a misnomer in TV. There is no waste in TV, just bonus views. In TV, advertisers only pay for the audience they buy – everything else is a windfall of extra viewers.

But those viewers you reach who are outside your bought audience are far from worthless; they are simply worth less.

So reach is crucial. You don't become a household name by avoiding most of the households. However, as people have embraced new ways to watch TV, their viewing has split across different times, places and devices and getting a proper picture of TV's reach has become harder.

Industry standard measurement (viewing within seven days of broadcast on a TV set) has not been able to keep pace with the changes in TV viewing.

For example, among 16–34s there's an extra 15% of TV viewing that is not included as part of the industry standard measurement, these being the most enthusiastic adopters of the new ways we have to watch TV (see p. 14).

“Among 16–34s there's an extra 15% of TV viewing that is not included as part of industry standard measurement.”

BELOW Fargo, Channel 4



Industry standard measurement only gives a partial picture of TV. A consequence of this is that it has looked as though TV's ability to drive cost-effective 1+ reach, especially among younger audiences, had declined.

This led to a question we at Thinkbox have been asked above all others: how can Broadcaster VOD be planned in conjunction with linear TV to maximise reach?

Many media agencies have developed their own systems to estimate the combined reach of TV and BVOD. But we've been in urgent need of an industry standard and I'm happy to say we now have one, and a very credible and revealing one it is too.

Step forward and receive thunderous applause IPA TouchPoints' new AV planning tool. It has a channel planner to find the optimal splits of TV and BVOD to maximise 1+ reach at the lowest budget for the key buying TV audiences.

Using data from the 5,000 strong IPA TouchPoints media diary and hub questionnaire, RSMB has made it possible to model the reach build for TV and BVOD together.

So, for example, a campaign today targeting 16–34s with a budget of £1 million planned only across 'industry standard' TV reaches 60% of 16–34s, when it would have been 70% back in 2007.

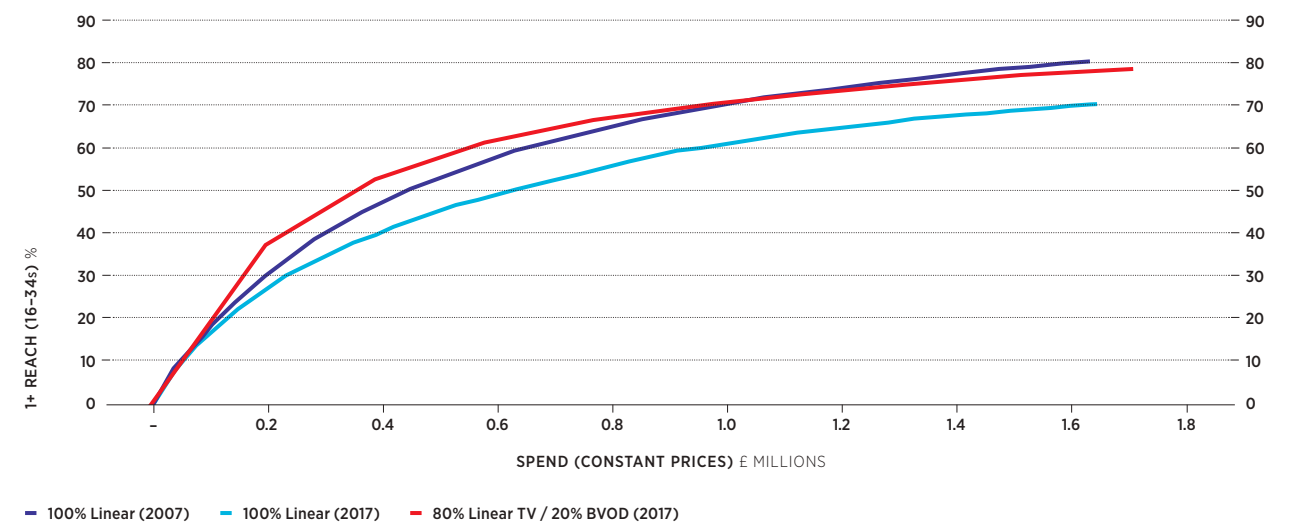
But, with the new TouchPoints planning tool we can see that by using an 80:20 mix of industry standard TV and Broadcaster VOD, this goes back up to 70%. TV's reach is undiminished.

This is an important new tool for the industry. It shows the modern marketer how to generate incredibly high and cost-effective reach using the premium, brand safest advertising environment, and the optimal budget splits between TV and BVOD to achieve this.

TV's immense reach is still easily within reach. ■

“As people have embraced new ways to watch TV, getting a proper picture of TV's reach has become harder.”

INCLUSIVE OF BVOD, TOTAL TV REACH IS UNCHANGED FOR 16–34S
Source: BARB / K2 / Touchpoints 2017 / Station average prices / Natural delivery.



TV advertising in the video world

From click farms and brand safety issues to the continuing issues in measurement and lingering questions of effectiveness, the video world didn't get any less complicated in 2017. What is increasingly clear is that not all forms of video are of equal value to advertisers. But, if you want to advertise next to high-quality shows in a high-quality, brand-safe context – at scale or more personally – TV is the answer.

TV ACCOUNTS FOR 95% OF VIDEO ADVERTISING SEEN

That's in full, with the sound (most likely) turned on and with unbeatable effectiveness (see p. 26). For 16-34s, TV advertising accounts for 90%. In 2017, YouTube accounted for 0.9% of video advertising time for all individuals and 2.9% for 16-34s. Netflix and Amazon accounted for none.

TV ACCOUNTS FOR 71% OF ALL VIDEO VIEWING

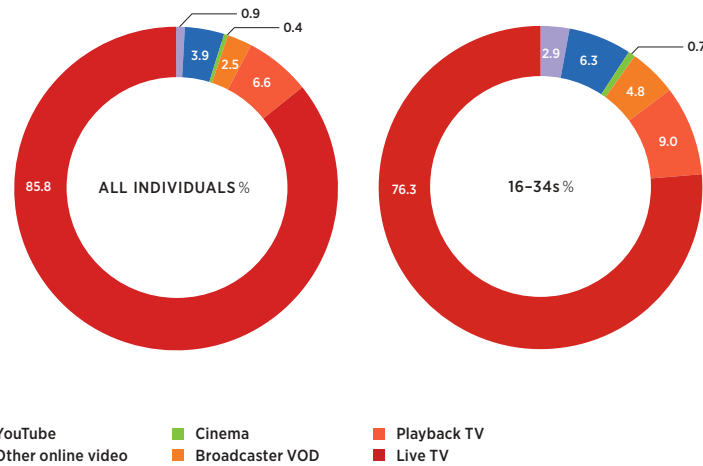
A caveat: we can confidently say 'viewing' when we talk about TV, cinema and SVOD, for example, but not all video activity is strictly speaking viewing (or by humans). For example, a significant chunk of YouTube activity is where the service is being used more like a jukebox.

Nonetheless, in total, the average person in the UK watched 4 hours, 39 minutes a day of video in 2017. TV's share of total video time in 2017 was slightly down from 2016, a total of 4% points fewer. The astonishing choice of video on offer has unsurprisingly taken a slice of time from watching TV – most likely the TV we watched more as a compromise than a choice.

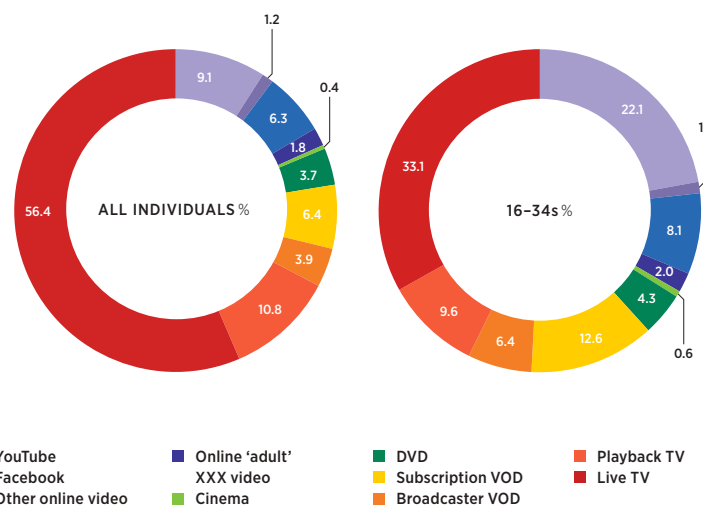
LIVE TV VIEWING CONTINUES TO DOMINATE

But it has moved from 60% of all video to 56%. The shares of the playback of recorded TV and broadcaster VOD are largely unchanged year-on-year.

TV ACCOUNTS FOR 95% OF ALL VIDEO ADVERTISING TIME
Source: 2017, BARB / comScore / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 2017 / Rentrak.



TV ACCOUNTS FOR 71% OF OUR VIDEO DAY
Source: 2017, BARB / comScore / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 2017 / Rentrak.



NEW COMSCORE DATA ALTERS THE PICTURE

In 2017, for the first time, there was a full year of data available from comScore's multiplatform Video Metrix analysis software. This has had an impact on the YouTube data. In the absence of mobile data, previous Thinkbox analyses of the video world have employed IPA Touchpoints data to estimate the proportion of YouTube activity on mobiles. The new comScore data – provided by YouTube – suggests that mobile accounts for a significantly higher proportion than the Touchpoints study found (39% for Touchpoints vs. 66% for comScore).

So, following comScore's change in methodology, YouTube has grown from 6.5% of all video in 2016 to 9.1% in 2017.

88% OF YOUTUBE USE IS BY 20% OF ITS USERS

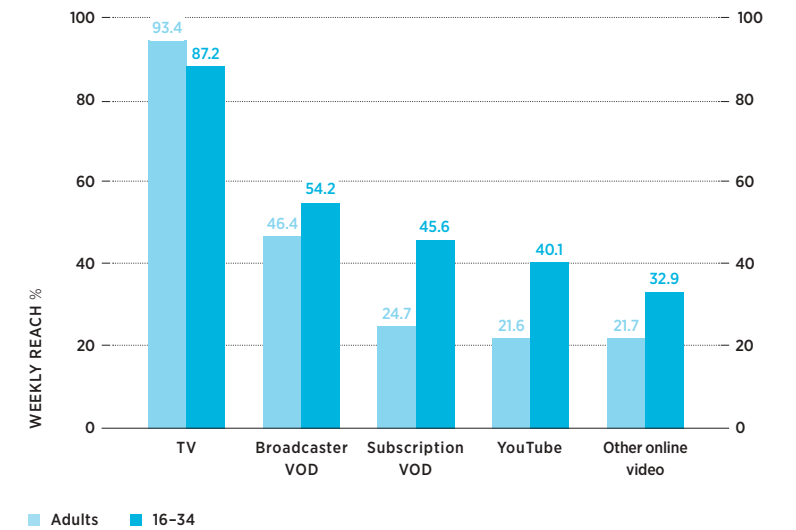
It's important to take into account the fact that, unlike BARB, comScore reports the activity of devices not humans. ComScore's data shows that 88% of YouTube activity is generated by only 20% of devices. There is a hardcore of YouTube super-users that affect the average (for TV 48% of viewing is accounted for by the heaviest 20%).

In addition, a portion of YouTube activity is using the service as a jukebox, so the service is being listened to as opposed to watched. This use of YouTube is on the increase. IPA Touchpoints data for 2017 shows that 71% of 16-34s use YouTube at least once a month for 'background music', up from 57% in 2016.

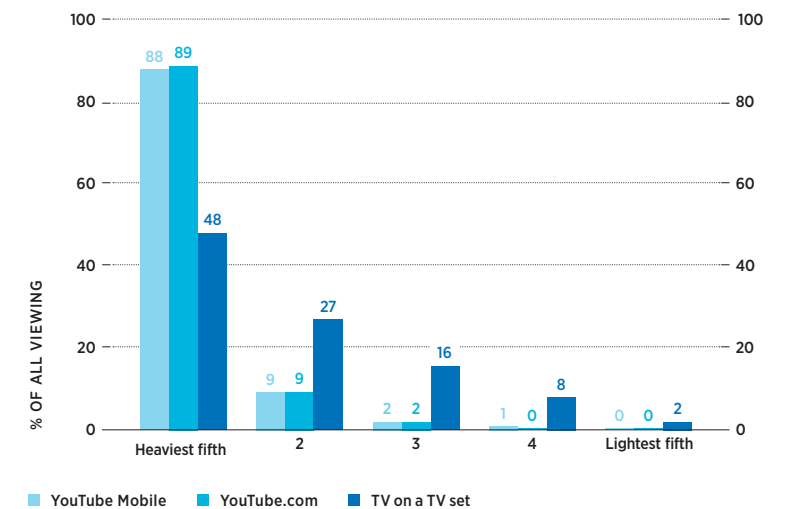
FACEBOOK NOW ACCOUNTS FOR 1.2% OF VIDEO TIME

This equates to 3 minutes a day per person, which echoes Facebook's own claims that 100 million hours of video are watched on Facebook a day. With 2 billion users globally, this averages out at 3 minutes a day per person. In 2016, Facebook accounted for 1.7% of video time, so a story of stability year-on-year.

WEEKLY REACH BY VIDEO TYPE
Source: Touchpoints 2017, IPA, Other online video inc, Facebook video.



THE MAJORITY OF YOUTUBE VIEWING IS GENERATED BY HEAVY VIEWERS
Source: comScore November 2017 / BARB November 2017.



TV advertising in the video world

Continued...

AMONGST 16-34S, TV ACCOUNTS FOR 49% OF ALL VIDEO VIEWING

This is down from 59% in 2016 following the impact of comScore's new methodology and the effect it has had on YouTube activity, which increased from 13% of all 16-34s' video in 2016 to 22% in 2017 (see previous page).

SVOD VIEWING HAS GROWN FROM 4.1% TO 6.4%

It is likely that this growth has been at broadcaster TV viewing's expense, which makes sense as SVOD is TV and more homes now have access to SVOD services. As of Q4 2017, 10.2 million homes in the UK (36%) subscribed to either Amazon Prime or Netflix, according to the BARB Establishment Survey, up 23% from 8.3 million in Q4 2016. Based on our viewing estimates, this means that in homes with access to Netflix or Amazon Prime, the average viewer spends 50 minutes watching SVOD per day.

For 16-34s, SVOD has grown from 9% to 13% of all video viewing. 54% of 16-34s have access to either Amazon Prime or Netflix according to the BARB Establishment Survey. In these homes we estimate that 16-34s spend on average 1 hour, 3 minutes watching SVOD per day (see previous page).

LIFE STAGE INFLUENCES VIDEO CONSUMPTION

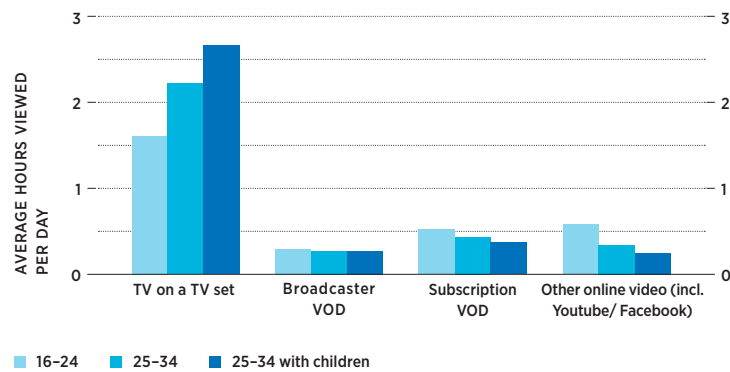
No one has a crystal ball, but we do have the IPA's Touchpoints study. It shows the impact that our life stage has on our viewing habits. Looking within the 'millennials' generation, it shows that as millennials get older they watch less YouTube and Netflix, and more TV. If they have kids, TV becomes even more popular. With 91% of the UK having internet access, 73% having VOD services on their TV and 81% carrying smartphones, it is reasonable to think that this may now be an established pattern of behaviour.

SCREEN PREFERENCE VARIES BY VIDEO

According to Touchpoints, BVOD and SVOD are most likely to be viewed on the TV set, while YouTube is most commonly viewed on a PC/laptop. Broadly speaking, 16-34s and adults have similar preferences when it comes to what form of video is watched on what screen, although 16-34s are more likely to watch video on PC/laptops, tablet or smartphone. ■

THE IMPACT OF LIFESTAGE ON TV VIEWING

Source: Touchpoints 2017, IPA. Base: 16-24, 25-34, 25-34 with children.



VIEWING PROPORTIONS BY DEVICE - ADULTS

Source: Touchpoints 2017, IPA. All adults. 'Other device' not shown.

	LIVE/STREAMED/RECORDED TV	BVOD CATCH UP	SVOD	YOUTUBE	ALL OTHER ONLINE VIDEO
% OF ALL VIDEO TIME 2017	67.2%	3.9%	6.4%	9.1%	9.3%
TV	99%	66%	66%	18%	39%
PC/Laptop	0.4%	15%	18%	41%	37%
Tablet	0.3%	11%	8%	14%	9%
Smartphone	0.1%	5%	5%	25%	12%

VIEWING PROPORTIONS BY DEVICE - 16-34S

Source: Touchpoints 2017, IPA. 16-34. 'Other device' not shown.

	LIVE/STREAMED/RECORDED TV	BVOD CATCH UP	SVOD	YOUTUBE	ALL OTHER ONLINE VIDEO
% OF ALL VIDEO TIME 2017	42.7%	6.4%	12.6%	22.1%	11.2%
TV	98%	59%	60%	13%	30%
PC/Laptop	1.0%	21%	22%	44%	48%
Tablet	0.4%	10%	9%	13%	7%
Smartphone	0.4%	7%	6%	27%	13%



TV advertising revenue: the pendulum is swinging back

Post-recession, TV advertising in the UK had seven consecutive years of growth. But TV hyper-reacts to the economy, good or bad, and recent uncertainty saw growth stall in 2017. However, this was temporary and there are signs that growth is returning.

TV ad revenue totalled £5.11 billion in 2017 (gross of agency commission), down 3.2% on 2016. This represents all the money invested by advertisers in commercial TV across all formats and on any screen: linear spot and sponsorship, product placement, broadcaster VOD, addressable and interactive.

Q4 2017 WAS UP 2% YEAR-ON-YEAR

Although total TV advertising investment in 2017 was down, Q4's performance is significant. It was the first proper year-on-year comparison since the impact of the Brexit referendum and it shows the shoots of regrowth with TV spend up year-on-year by approximately 2%.

ONLINE BRANDS REMAIN THE BIGGEST ADVERTISERS ON TV

Now more than ever, online brands need to be seen as trustworthy. Imbuing brands with trust is one of TV advertising's strengths and online businesses seeking to harness the brand-building power and confidence that TV advertising instils invested £682 million in TV in 2017, a decrease of only 0.3% on 2016.

785 NEW OR RETURNING ADVERTISERS ON TV

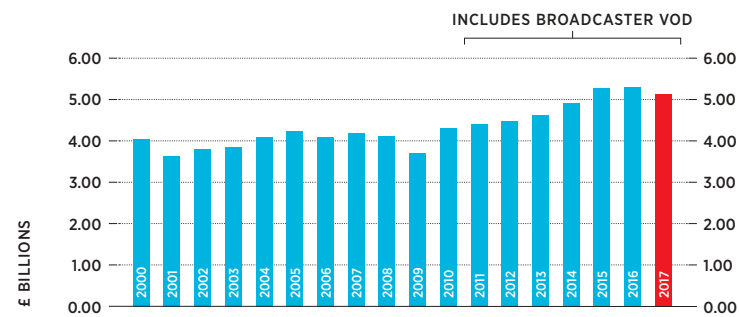
This figure represents the number of brands who advertised on TV for the first time or returned to TV after a gap of at least five years and includes new to TV advertisers who used Sky AdSmart. Notable new or returning brands included Uber, Opodo and Sixt.

TV FORECAST TO RETURN TO GROWTH

WARC estimates for the Advertising Association indicate that the total UK advertising market grew to £22.1 billion in 2017 (up 3.4%), with TV advertising representing 23.4% of it. The AA/WARC forecast that in 2018 the ad market will reach £22.7 billion (up 2.8%), with TV forecast to increase by 1.5%.

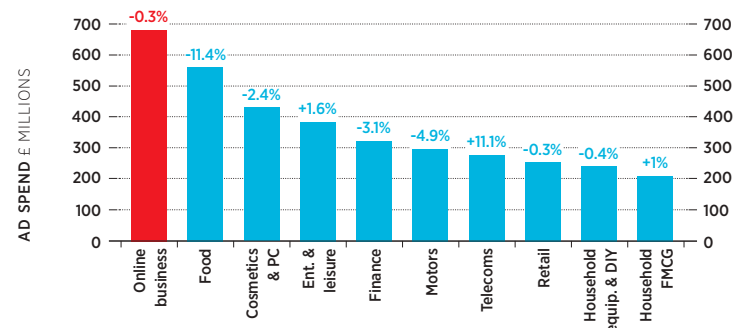
TOTAL TV REVENUE

Source: Advertising Association/WARC Expenditure Report 2000-2010. 2011-2017 data supplied by the UK broadcasters which includes VOD revenue. Note: Figures are at current prices and gross. Revenue includes linear TV spots and sponsorship, product placement, broadcaster VOD, addressable and interactive (broadcaster VOD from 2011).



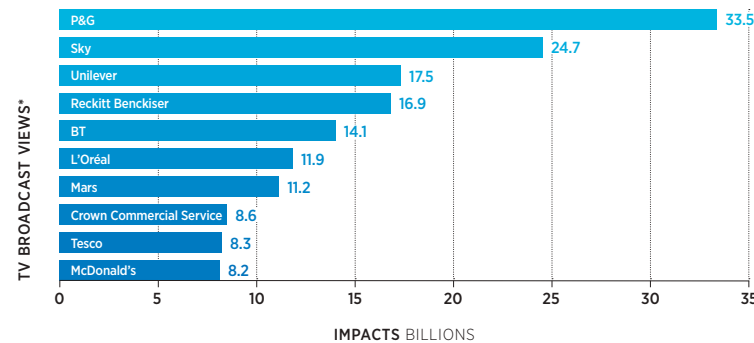
ONLINE BUSINESSES ARE THE BIGGEST INVESTORS IN TV

Source: Nielsen, 2016 vs. 2017. 'Online business' is a Thinkbox-created category which consists of all online-only brands and online services for bricks and mortar businesses.



MOST VIEWED ADVERTISERS / HOLDING COMPANIES IN 2017

Source: BARB, 2017, R/W commercial impacts according to BARB reporting.



*A TV ad 'view' relates to a single viewer watching a full TV ad at normal speed and with the sound likely to be on, as measured by The Broadcasters' Audience Research Board (BARB).

TV IS DELIVERING EXCELLENT VALUE

In 2017 the average adult cost per thousand for TV set ad views (100% viewable, played through from start to finish at normal speed) was £5.06, 4% less than 2016 and 28.6% cheaper in real terms than 10 years ago. This high value should be coupled with findings from Ebiquity and Gain Theory's 'Profit Ability' study (see p. 26) that showed TV advertising investment is often sub-optimal. This means there is a significant opportunity for brands to get even more business impact out of TV.

WHY DID TV ADVERTISING NOT GROW IN 2017?

In 2017, according to data from Nielsen, 216 advertisers in the UK increased their TV budgets by over £1 million year-on-year, a total of £546 million in additional investment. At the top end of this was the likes of Samsung, which increased TV spend by 33% from £34 million to £45 million, contributing to a very successful year for the company. However, there were 240 advertisers who invested over £1 million less in 2017 than in 2016 - a total loss of £663 million.

This pattern shows that, despite there being a decline in standard TV viewing (p. 12) and growth in some other forms of ad-funded video content, there is no structural cause of TV spend not growing in 2017. If there was, most or all brands would be cutting spend, but this is not happening. Instead, there are other topical factors that had a disproportionate impact on TV.

THE FMCG SECTOR IS UNDER HUGE PRESSURE

The success of an FMCG campaign relies heavily on reach and the recruitment of lighter consumers to boost the return on investment, both areas in which TV excels. But FMCG brands are under huge pressure. The post-Brexit drop in the value of the pound, wage inflation falling behind RPI, and the rise of discounters like Lidl and Aldi have all hit FMCG profits and led to short-term cost cutting. With TV such a fundamental medium for this category, it is understandable that this has been a key factor in the overall TV spend levels.

The impact of FMCG can be clearly seen when you look at where the biggest cuts in TV came from. Of the 10 advertisers who saw the biggest cuts in TV spend in 2017 compared with 2016, seven are FMCG advertisers, including Mars Confectionery which more than halved its TV budget (-£23 million) and Premier Foods which cut its TV budget by 74% (-£11 million). In total, these seven FMCG advertisers account for a £103 million decline in TV revenue year-on-year.

SIGNS OF IMPROVEMENT

Going forward, it is sensible to remain cautious, but things are looking up. For FMCG advertisers, the year-on-year Brexit effect on the value of the pound has come to pass and in Q4 2017, FMCG investment in TV advertising grew by 8% year-on-year, according to Nielsen. ■

“The first proper year-on-year comparison since the impact of the Brexit referendum shows the shoots of regrowth with TV spend up year-on-year.”

BELOW Cold Feet, ITV





Research & trends

Profit Ability: the business case for advertising

This study, for the first time, quantified the total profit generated by different forms of advertising to show what they deliver to the bottom line. It set out to examine and benchmark all media's profit-generating performance, with a particular emphasis on uncovering TV advertising's effects.

The study was commissioned by Thinkbox from Ebiquity and Gain Theory, who independently evaluate advertising performance and effectiveness for hundreds of brands. Using their databanks of existing, client-funded data, they analysed over 2,000 advertising campaigns across 11 categories to uncover the impact that different forms of advertising have on short-term profit (within 3-6 months of a campaign finishing), and then combined these learnings with results for profit generated over the longer term (up to 3 years on) to determine total profit return. Clearly, advertising also has an even longer-term impact beyond 3 years, but that is beyond the scope of this study. The key findings were...

58% OF ADVERTISING'S PROFIT RETURN IS OVERLOOKED WHEN IGNORING THE LONG-TERM

Less than half of advertising's profit impact happens in the short term. Businesses optimising their advertising investment based solely on these more easily visible short-term returns are hugely undervaluing the total profitability driven by advertising. They are not maximising the growth and value of the company.

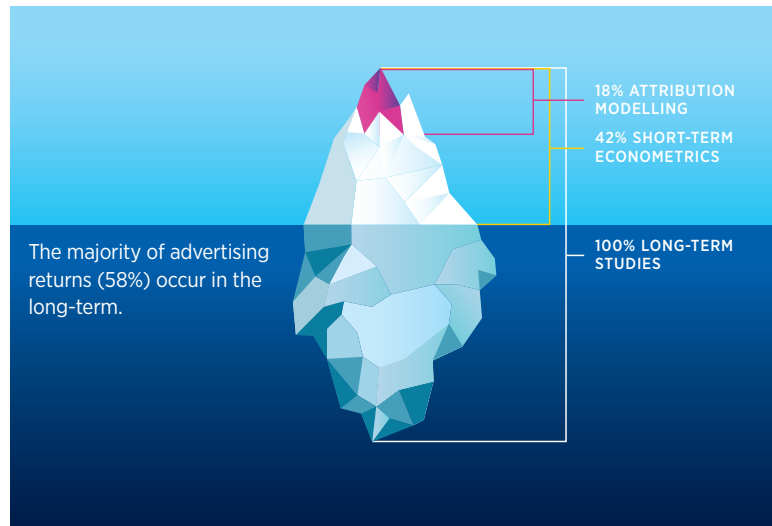
ADVERTISING IS A POWERFUL BUSINESS INVESTMENT

Looking at total profit return on investment (ROI) over 3 years, the average campaign delivers a profit ROI of £3.24 per pound spent. This varies by channel, but all forms of advertising, except Online Display, deliver profitable returns when you look at their long-term impact.

DON'T LOOK AT ROI IN A VACUUM

This study is unique because it moves on from only looking at ROI to position it within the context of the volume of investment and scalability of different media. It found that, in the short term, TV is responsible for 62% of all advertising-generated profit at an ROI of £1.73 for every pound spent, the highest of any media. In the longer term, TV advertising creates 71% of total advertising-generated profit at an ROI over 3 years of £4.20 for every pound spent, also the highest of any media.

THE PROPORTION OF TOTAL PROFIT REVEALED BY ATTRIBUTION MODELLING AND ECONOMETRICS
Source: 'Profit Ability: the business case for advertising', Nov 2017 Gain Theory long-term ROI study.



PROFIT ABILITY KEY FINDINGS

Source: 'Profit Ability: the business case for advertising', Nov 2017 | Ebiquity & Gain Theory.

	TOTAL AD-GENERATED PROFIT (WITHIN 3 YEARS)				SHORT-TERM AD-GENERATED PROFIT (WITHIN 3-6 MONTHS)				NO. OF CAMPAIGNS
	% OF BUDGET	% OF PROFIT	AVERAGE PROFIT ROI	PROFIT LIKELIHOOD	% OF PROFIT	AVERAGE PROFIT ROI	PROFIT LIKELIHOOD		
TV	54%	71%	£4.20	86%	62%	£1.73	70%	1,280	
PRINT	23%	18%	£2.43	78%	22%	£1.44	61%	980	
OUT OF HOME	8%	3%	£1.15	48%	3%	£0.57	19%	580	
ONLINE VIDEO	6%	4%	£2.35	67%	5%	£1.21	52%	158	
RADIO	5%	3%	£2.09	75%	5%	£1.61	62%	540	
ONLINE DISPLAY	4%	1%	£0.84	40%	2%	£0.82	37%	330	
ALL MEDIA	100%	100%	£3.24	72%	100%	£1.51	58%	1,954	

Note: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

TV DELIVERS SCALE OF RETURN

TV drives the most profit because its scale and popularity enable it to deliver efficient profit return at high volumes of spend. Businesses can increase investment in TV to a higher level than other media and it will continue to generate a profitable return before diminishing returns kick in.

ADVERTISING-GENERATED PROFIT VARIES BY CATEGORY

As well as looking at overall advertising performance, the study also shows how different forms of advertising perform for different categories - Retail, FMCG, Financial Services and Travel - and how factoring in the long term is crucial to understanding the impact advertising has on different categories.

ADVERTISING CAN BE RISK ASSESSED

In the long-term, 72% of advertising campaigns create profit. Advertising is a safe business investment. TV is the 'safest' medium as it is most likely to create advertising-generated profit, both in the short and long-term. In the short term, 70% of TV advertising campaigns delivered a profitable return. During the 3 years after ad campaigns finished, this increases to 86% of TV advertising campaigns delivering a profitable return.

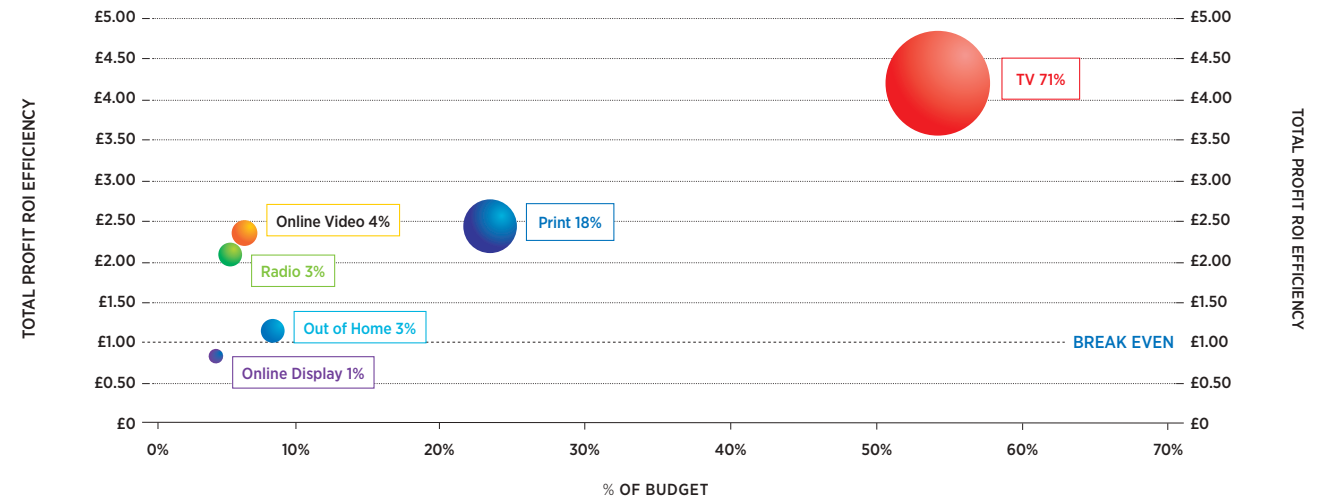
IT'S TIME TO REASSESS THE RETURN THAT ADVERTISING CAN GENERATE

Businesses can now reassess the potential return that can be generated by different forms of advertising. For example, the study concludes that advertisers may be missing out on maximising advertising-generated profit by under-investing in TV. Currently, TV accounts for 54% of advertising spend among Ebiquity's database, yet it is responsible for 71% of total advertising-generated profit.

"TV delivers 71% of total profit generated by advertising, at the greatest efficiency, and for the least risk."

PROPORTION OF ADVERTISING-GENERATED PROFIT BY MEDIUM

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



Note: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

Bubble size represents % of total profit
Total profit = all return (short + long-term) generated over 3 years

Profit Ability Continued...

THE DATASET

The findings are representative of the average performance of larger, better-known advertiser brands whose media is bought by the major media agencies and is professionally audited by Ebiquity and/or Gain Theory.

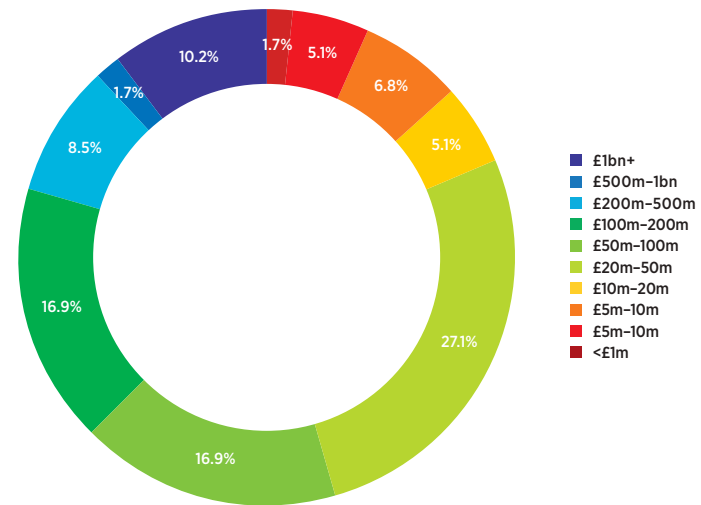
Ebiquity's client base was used to determine the short-term ROIs and ad-generated profit volumes, which Gain Theory then built on to determine long-term impact. The annual revenue distribution of Ebiquity's client base can be seen to the right:

So, all sizes of advertisers are accounted for, with a skew towards bigger companies. This is not surprising if we are realistic and pragmatic. To produce a study like this we are reliant on aggregating the data from advertisers who commission econometric analyses of their campaigns. As a result, the research sample necessarily only includes brands who are dedicated to effectiveness enough that they invest in this type of analysis. Their dedication to proving effectiveness suggests they are companies who are good at marketing.

Want to know more? Visit thinkbox.tv/profitability for detailed sector analyses and to download the full report and slide deck. ■

DISTRIBUTION OF EBIQUITY CLIENT BASE (ANNUAL TURNOVER)

Source: 'Profit Ability: the business case for advertising', November 2017. Ebiquity ROI campaign database.



BELOW Gogglebox, Channel 4



The X Factor ITV

Get with the Programmes

What brands can expect from TV sponsorship

Would you like the evidence and benchmarks to measure the positive impact TV sponsorship will have on your business? A major study by House 51 and YouGov provides just that. Here we look at the key findings from 'Get with the Programmes'.

MATCHMAKING VIEWERS WITH BRANDS

People love their favourite TV shows, and brands that sponsor them can share in that love and borrow from the show's personality. This 'brand rub' effect makes viewers feel the sponsoring brand is more for them. On average, the personality fit between a viewer of a sponsored TV show and the sponsoring brand is 53% higher than the fit between the sponsoring brand and a non-viewer.

MAGNIFYING BRAND STATURE

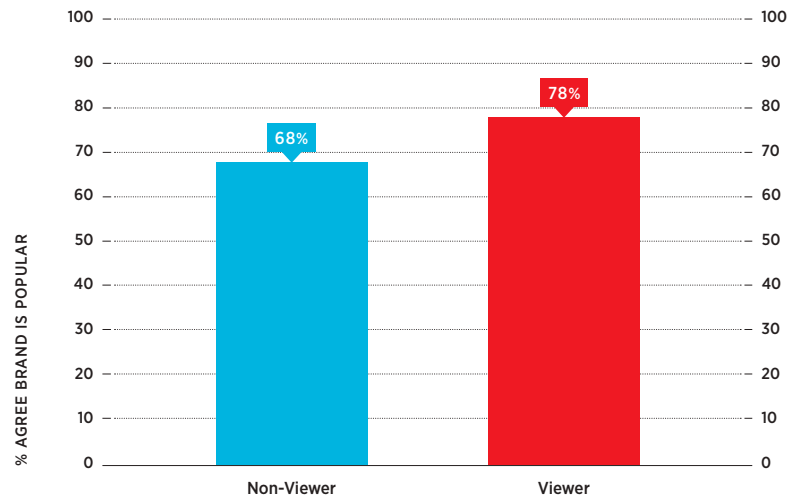
Partnering with TV shows takes advantage of 'costly signalling' - TV sponsorship is perceived to be costly, so it signals success. Viewers of a sponsored TV show are more likely to believe the sponsoring brand is popular than non-viewers.

BOOSTING MENTAL AVAILABILITY

Using a timed response test, House 51 found that viewers were twice as fast as non-viewers to agree they would recommend the sponsoring brand.

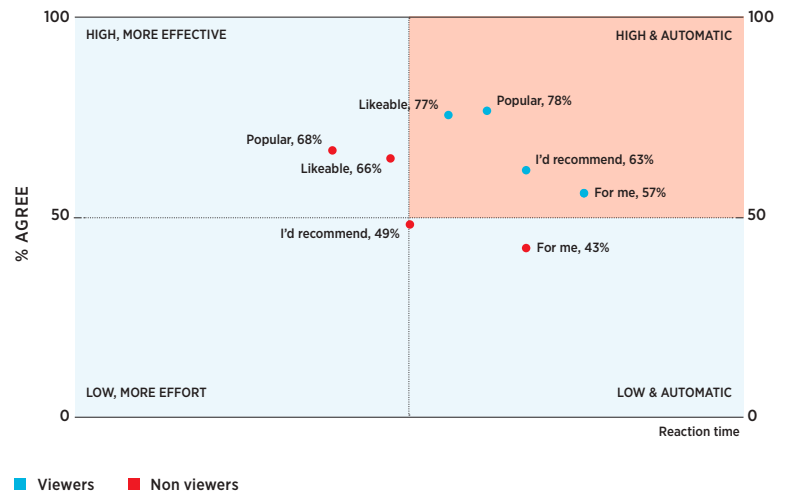
SPONSORSHIP MAGNIFIES BRAND STATURE

Source: 'Get with the Programmes', 2017, Thinkbox/House 51. Base: 8 sponsorships (1,199 viewers; 1,202 non-viewers).



MENTAL AVAILABILITY IS AMPLIFIED FOR VIEWERS

Source: 'Get with the Programmes', 2017, Thinkbox/House 51. Perception of sponsorship brand. Base: 8 sponsorships (1,199 viewers; 1,202 non-viewers).



TURBO-CHARGING AWARENESS ESPECIALLY FOR LESSER-KNOWN BRANDS

The reach and frequency that comes from sponsoring a TV show raises brand awareness for all brands. For lesser-known brands this effect is even greater, underlining the impact TV sponsorship offers new brands.

For less well-known brands, both their brand and advertising awareness scores were substantially higher for viewers of the TV shows they sponsored. Brand awareness was 17.2 percentage points higher than for non-viewers (it was 1.1 percentage points higher for well-known brands).

CREATIVE FIT IS KEY

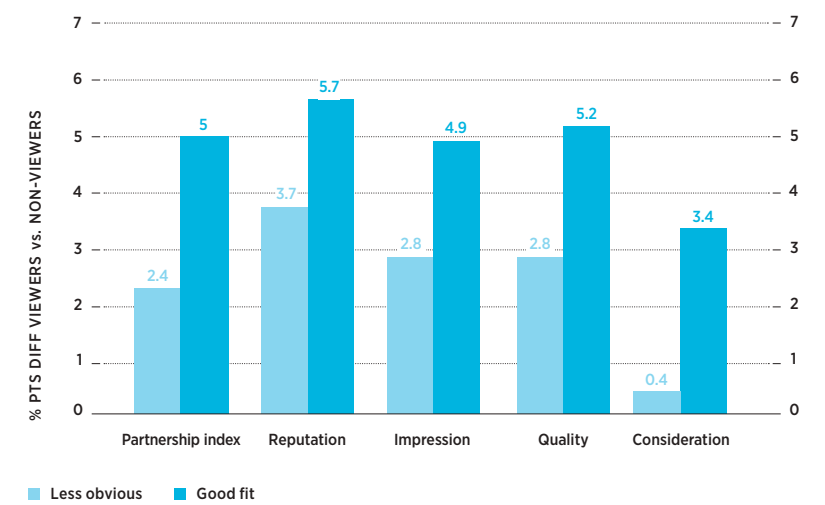
When a TV sponsorship creative was a good fit with a TV show, key brand health metrics for viewers of the sponsored show were 5 percentage points higher than for non-viewers. When the fit was less obvious they were 2.4 percentage points higher.

FULLY INTEGRATED PARTNERSHIPS WORK MUCH HARDER

Fully integrated sponsorships - those that include additional activity such as bespoke spot advertising, microsites, product placement, programme talent or licensing - increased brand health metrics by 8.9 percentage points above non-viewers compared with a 'badging-only' sponsorship approach which delivered a 2.8 percentage point increase.

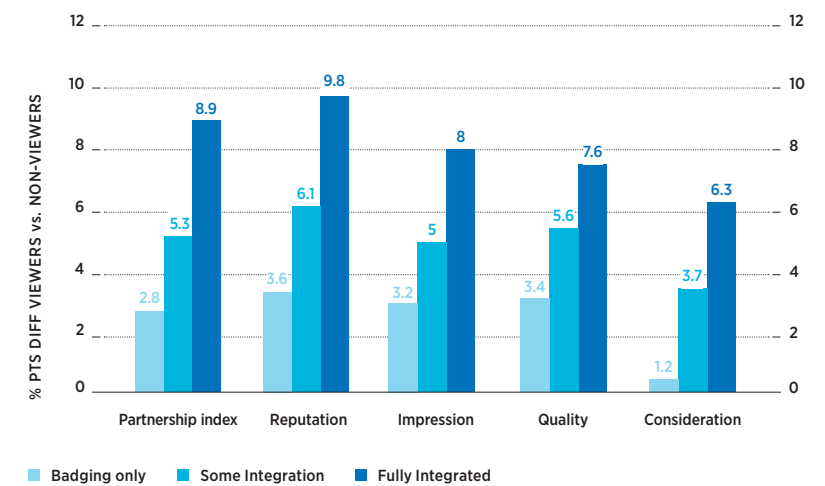
GOOD CREATIVE FIT DRIVES HIGHER BRAND HEALTH

Source: 'Get with the Programmes', 2017, Thinkbox/YouGov. Base: 26 'good fit' sponsorships, six 'less obvious' sponsorships. 'Partnership Index' is a composite average of reputation, impression, quality and consideration.



EXTENT OF CAMPAIGN INTEGRATION IS REFLECTED IN BRAND HEALTH

Source: 'Get with the Programmes', 2017, Thinkbox/YouGov. Base: 22 badging only, nine some integration, four fully integrated. 'Partnership Index' is a composite average of reputation, impression, quality and consideration.



Get with the Programmes Continued...

PLAY THE LONG GAME

Longer-running campaigns (three+ years) drove increases in all brand health metrics above younger campaigns (up to one year).

TV SPONSORSHIP EFFECTS LIVE ON

In the six months following the end of a TV sponsorship, whilst ad awareness fell as you'd expect, brand health metrics fell at a far slower rate. Six months after sponsorships had ended, 81% of the brand health advantage gained with viewers of the sponsored TV show was still active.

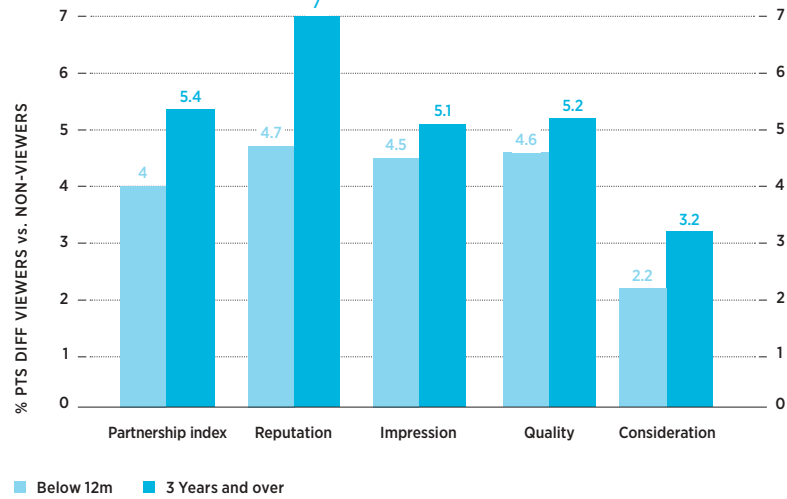
NOTE: METHODOLOGY

House 51 used a blend of mobile self-ethnographies, filmed in-depth interviews, and a quantitative survey across eight TV sponsorships, each time interviewing 300 viewers/non-viewers, to understand the mechanics of how TV sponsorship drives brand affinity.

YouGov combined their Brand Index database with their TV programme database (both of which survey the attitudes of 4,000 people every day) to look for evidence of the impact TV sponsorships deliver for brand health and to uncover the key drivers of increased effectiveness. ■

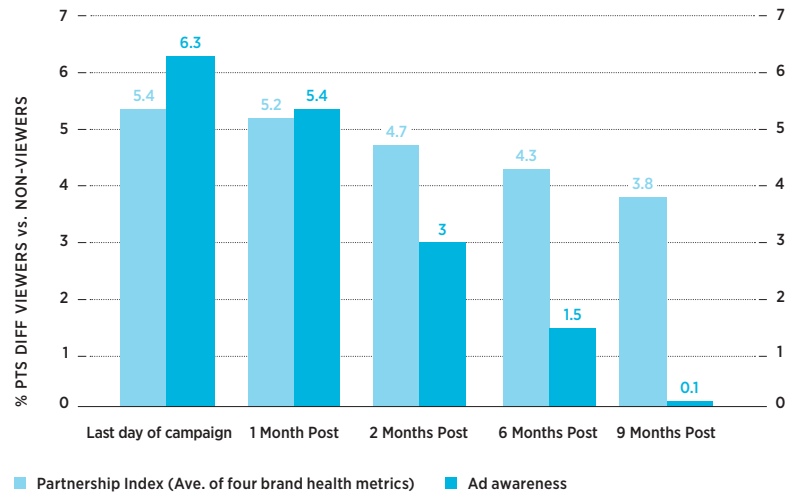
LONG-TERM PARTNERSHIPS DELIVER BETTER BRAND RESULTS

Source: 'Get with the Programmes', 2017, Thinkbox/YouGov. Base: 15 below 12 months, seven at three years and over. 'Partnership Index' is a composite average of reputation, impression, quality and consideration.



BRAND HEALTH DECAYS SLOWLY WHEN SPONSORSHIPS END

Source: 'Get with the Programmes', 2017, Thinkbox/YouGov. Base: 16 completed campaigns. 'Partnership Index' is a composite average of reputation, impression, quality and consideration.



TV in 2017 at a glance

Perhaps 'TV at a glimpse' is a better title given the impossibility of fitting everything from the last year on a double-page spread. But, this gives you a taste of what happened...

CANCER RESEARCH UK LIVE AD FIRST

Channel 4 airs the first live ad shot from inside the human body

THE NATIONAL TELEVISION AWARDS GO TO...

Emmerdale, I'm A Celebrity, Gogglebox, This Morning and Ant & Dec's Saturday Night Takeaway take the honours for commercial TV

LEGO BATMAN TAKES OVER CHANNEL 4 CONTINUITY

Warner Brothers brings Lego Batman to life as a continuity announcer

CHANNEL 4 TAKEOVER FOR INTERNATIONAL WOMEN'S DAY

Broadcaster hands control of its airwaves to 18 guest announcers for its biggest-ever continuity takeover

TV ACCOUNTS FOR 94% OF VIDEO ADVERTISING

New analysis by Thinkbox of 2016 video consumption in the UK shows breakdown of video advertising viewing

ITV & CHANNEL 4 PARTNER UP FOR ALZHEIMER'S SOCIETY

Broadcasters team up to simultaneously launch 'United Against Dementia' campaign

SKY Q HITS 1 MILLION HOMES

JOSHUA vs KLITSCHKO FIGHT IS A KNOCKOUT

Sky Sports broadcast is one of the biggest boxing matches in recent history

THE HANDMAID'S TALE PREMIERES ON CHANNEL 4

Award-winning series scores an average audience of 2.3 million per episode

SUPERHUMANS TRIUMPHS AT BRITISH ARROWS

Channel 4's campaign for the Paralympics wins Commercial of the Year

JANUARY

THE VOICE LAUNCHES ON ITV

The show's debut on commercial TV captures 5.6 million viewers, including 1 million 16-34s

FEBRUARY

ONLINE BRANDS FUEL GROWTH FOR TV ADVERTISING

Amazon, Facebook, Google and friends now the biggest spenders on TV with 8% increase in spend

ITV HUB LAUNCHES ON XBOX

MARCH

DISCOVERY LAUNCHES QUEST RED

New free-to-air channel with focus on true-life stories

APRIL

CHANNEL 4 SHOWCASES PERSONALISED AUDIO ADVERTISING

20th Century Fox's campaign for 'Alien: Covenant' uses new BVOD ad format that addresses viewers by their name

MAY

JAMESTOWN DEBUTS

New Sky One series is the channel's biggest launch in a year

JUNE

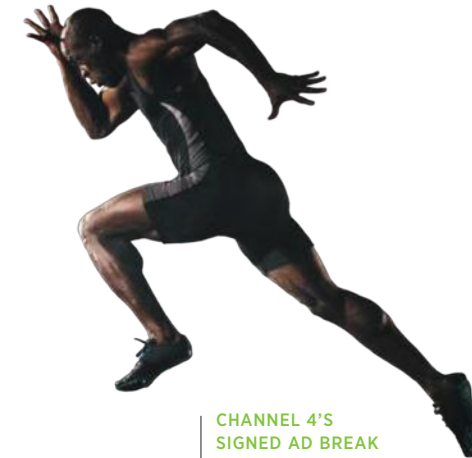
SKY AND VIRGIN MEDIA ANNOUNCE STRATEGIC PARTNERSHIP

Enables brands to reach more than 30 million viewers with brand-safe targetable advertising

RIVIERA IS A SKY RECORD BREAKER

Sun-drenched crime thriller becomes the broadcaster's most successful original commission

03



GET WITH THE PROGRAMMES

New study commissioned by Thinkbox reveals the value that TV sponsorships deliver for brands

DFS AND MEDIACOM WIN GRAND PRIX

At the Thinkbox TV Planning Awards for ongoing TV ad innovation that sold £1bn worth of sofas

LIONESSES SMASH RECORD

England's crunch Euro 2017 semi-final against Holland draws the biggest-ever UK TV audience for a women's football match with a peak of 4 million

CHANNEL 4'S SIGNED AD BREAK

Brands including Nationwide, Samsung and Maltesers team up with Channel 4 to create the first ad break fully accessible to deaf and hard-of-hearing viewers

JUST EAT SPONSORS THE X FACTOR

The online food delivery brand creates adverts featuring singing chefs

DAVE BECOMES 'RUPERT' FOR SNICKERS

UKTV channel morphs into a posh and pretentious character for 'You're not you when you're hungry' campaign

JULY

LOVE ISLAND IS A SMASH HIT ON ITV2

The number of 16-34s watching increased by 86% year-on-year

GAME OF THRONES FINALE REACHES 5.2M

The final episode of season 7 is Sky's largest-ever audience

AUGUST

SKY & HBO ANNOUNCE FIRST CO-PRODUCTION DEAL INVESTMENT

Investing in British production company Bad Wolf as part of \$250m deal

JOHN SNOW TACKLES FACEBOOK

Veteran newsreader calls on digital platform to pay more for TV news content in the Edinburgh TV Festival's McTaggart Lecture

SEPTEMBER

CORONATION STREET ADDS AN EPISODE

The record-breaking soap moves to six shows a week

AND THE EMMY GOES TO...

Sky Atlantic's Big Little Lies and Channel 4's The Handmaid's Tale are the big winners

TASKMASTER RETURNS TO DAVE

Bafta-nominated UKTV Originals show back for series 5

OCTOBER

SKY LAUNCHES DIVERSITY COMPETITION

Aims to encourage brands to be braver when targeting ethnic minority groups

CHANNEL 4, ITV AND SKY MEDIA UNITE

Broadcasters and Thinkbox team up to launch The Big TV Festival, an event for media planners and marketers to showcase the power of TV advertising

CHANNEL 4 JOINS EUROPEAN BROADCASTER EXCHANGE

Ad alliance will see Channel 4 run pan-European campaigns across its VOD services alongside other EBX partners

PROFITABILITY

New research from Ebiquity and Gain Theory - commissioned by Thinkbox - reveals that TV advertising outperforms all other media investments, in both the long and short term

CO-OP FESTIVE CHOIR AD LAUNCHES ON CHANNEL 4

Groups sing the theme tunes of The Crystal Maze, Gogglebox and Countdown in the break immediately preceding the shows

AUDI IS AD OF THE YEAR

Thinkboxes winner 'Clowns' by BBH is chosen as top film ad of 2017 by Campaign magazine

NOVEMBER

WORLD TV DAY

Global TV Group launch 'The Global TV Deck', pulling together data from 19 countries to underline the power of TV advertising

RECORD RATINGS FOR GOLD'S MURDER ON THE BLACKPOOL EXPRESS

Becomes the highest-ever rated show on Gold

THE GREAT BRITISH BAKE OFF RISES TO THE TOP

Channel 4 wins its biggest audience in 32 years and second-biggest ever

SKY ADSMART HITS 10K CAMPAIGN MILESTONE

Landmark campaign is for Clydesdale Bank

ITV LAUNCHES LINEAR ADDRESSABLE ADVERTISING

Partnership with Sorenson Media will see dynamically personalised ads on ITV's channels

DECEMBER

CHANNEL 5 ENJOYS GREAT 2017

Delivered highest ever share of 16-34 UK views in 2017 and strongest overall performance for 13 years

TWO LEGENDARY STREETS TEAM UP FOR CHRISTMAS ON ITV

Coronation Street and Quality Street partner to offer families a festive celebration on the hallowed cobbles



01 Jamestown
02 UEFA Women's EURO 2017
03 Profit Ability
04 Coronation Street

02



04



Ad fab: new approaches to TV advertising

Imagine the most yogic, yoga guru you can think of. Someone who wakes up to discover they slipped effortlessly into the 'King Pigeon Pose' whilst sleeping. Someone who inserted the 'Pose Dedicated to the Sage Koundinya' into the first dance at their wedding. Someone, in short, who is incredibly flexible (though not necessarily short).

Well, that's a bit like TV advertising, but with less spandex and chakras. TV has never been more flexible, more agile, more versatile. There have never been more ways to tap into its commercial magic and tread untrodden paths on the road to televisual enlightenment. Here we showcase some of the clever ways brands are using today's TV, from creating brilliant new shows to creatively disrupting ad breaks.



DAVE BECOMES RUPERT



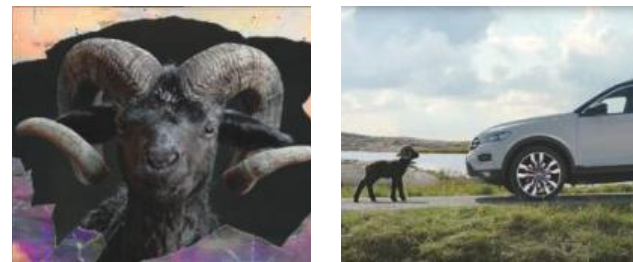
- UKTV's channel Dave was given a temporary identity as part of a partnership with Snickers
- Built around Snickers' "You're not you when you're hungry" tagline, Dave became the posh and pretentious 'Rupert' each day for a week at 3.28pm, the "hungriest time of day"
- The channel replaced its usual blokey comedy with programmes such as a chess tournament, a French film noir and an arts appreciation programme
- The switch saw Dave's name change across social media and on billboards. Even the receptionist answered the phone as 'Rupert'
- Dave sprang back to life at the end of each segment with the accompanying Snickers tagline
- A brilliant example of broadcasters' ability and willingness to bring to life ambitious ideas and deliver them across every platform

WORLD'S FIRST AUDIO PERSONALISED BROADCAST AD FOR 'ALIEN: COVENANT'



- 20th Century Fox used pioneering audio technology on All4 to promote 'Alien: Covenant' in a terrifying way: addressing viewers directly with their name
- This was attention-grabbing, technologically-pioneering, world-first, data-driven TV
- All4 viewers were treated to a horrifying trailer for the new film, ending with the voiceover addressing the viewer by name and telling them to "RUN!"
- Created individual voiceovers for 200 names, covering 7.5 million of the All4 registered userbase
- Generated press coverage with an estimated value of £500k, more than 10 times the campaign budget – including the entire ad played on BBC News
- Audio campaign showed +54% uplift in engagement compared with the standard benchmark

BAM THE RAM SMASHES THROUGH FOR VOLKSWAGEN



- This campaign for the Volkswagen T-Roc SUV saw the TV ad's "Born confident" Bam the Ram interrupt other brands' advertising in launch spots with Sky Media
- Cracks appeared on screen during ad breaks for brands like Admiral Insurance and Virgin Atlantic. Bam then eventually broke through for the Volkswagen T-Roc ad to play in full
- The idea was extended into other media, including national press and digital out-of-home
- An innovative way to drive cut through and continue an ad's narrative throughout the break

VISITSCOTLAND'S INTERACTIVE CAMPAIGN FIRST FOR E4



- Viewers were invited to both star in and commission a selection of ads for a week in an aspirational campaign targeting younger viewers
- Six young travellers were chosen from a pre-campaign casting call on E4. They experienced a range of activities across Scotland every day for a week and their escapades were shown each evening in a 60-second spot
- After each ad viewers voted on Twitter using the hashtag #ScotE4 to determine the activity the six would undertake the following day
- The Twitter poll remained live for an hour after the ads aired with the production crew ready to quickly move to the chosen location for the following day's shoot
- Activities were chosen to position Scotland as "the ultimate playground for the young and adventurous" and included mountain biking, sea kayaking and sled dog safaris
- This was an exciting, highly engaging, and surprising approach for the brand

SUPERDRUG SUPERCHARGED BY LOVE ISLAND



- Superdrug's strategy was all about fun in the sun so sponsoring ITV's Love Island was a great fit
- They wanted to bring the partnership to life across as many platforms as possible and utilise the growing success of the show
- They created exclusive content including Q&As with the cast discussing Superdrug products, a bespoke blog, a consumer newsletter, heavy social activity as well as a tie-up with Heat magazine
- Fans were given access and insights into the islanders' hair, skincare and beauty tips
- A great example of a brand making the most of a programme partnership

CARLING OWNS FRIDAY NIGHT FOOTBALL



- To reconnect with its key male 18-34 audience and celebrate football, Carling created 'Carling In Off The Bar' with Sky
- This live, three-part, cross-media show – from a pub – was hosted by Soccer AM presenters and featured sporting chat, games and songs with fans, ex-footballers, comedians and social influencers
- It turned Friday night football into an ownable event that Carling could host, with a pre-match live broadcast on Sky Sports from a Carling pub in the home team's city; a 15-minute half-time analysis live-streamed on social media; and a post-match analysis live on Sky Sports and social media
- Episodes were made available on-demand on Sky Go, and cut-downs available to distribute via Carling social channels to extend reach and viewing opportunities beyond Friday night ■



Televisionaries

The year in commercial TV

There's only one thing better than watching TV and that's reading about TV. Here, Lisa Campbell casts her expert eye over another year in commercial TV packed with drama (entertainment, comedy, factual and every other genre).



LISA CAMPBELL

Director of the Edinburgh International Television Festival

RETURN OF THE NEW

When it comes to world events, 2017 is a year many would rather forget. Real life was at times so surreal it surpassed even David Lynch for unadulterated weirdness.

Lynch's eagerly-awaited *Twin Peaks* on Sky offered the perfect trippy escape from a world gone mad: "This is the water, and this is the well. Drink full and descend. The horse is the white of the eyes, and dark within." It's what we were all thinking.

The series was one of a raft of returns, remakes and spin-offs that characterised 2017, series such as *The Crystal Maze*, *Streetmate*, *Wife Swap: Brexit Special*, *Coach Trip: Road to...* and *The Price is Right* on Channel 4; *Blind Date* and more recently *Will and Grace* on Channel 5; and *The Voice Kids* and *Harry Hill's Alien Fun Capsule* on ITV - familiar formats and familiar faces providing comfort and security in an uncertain world.

Among the most successful reinventions of a format is ITV's *Love Island*. The third season aired in the summer on ITV2 with an average of 2.5 million viewers, up 1 million on the previous year. And with one episode capturing 1.8 million of 16-34s, it was a hit show for this key demographic in 2017.

Another noisy reinvention was *The Great British Bake Off* which moved to Channel 4 but kept the successful ingredients of puns and buns, with bread week providing the most scope for the show to out-innuendo itself thanks to 'tight balls', 'wonky balls' and a bread snail that prompted schoolgirl-like giggles.

More bizarre than even Noel Fielding were the Ofcom complaints - not about said sauciness, but at the offence caused when the comedian and host clambered into a fridge. Well things did need to cool down a bit...

FABULOUS FACTUAL

From phallic loaves to the real thing now, with ITV's *The Real Full Monty*. The broadcaster cleared the night for the feature-length factual show which gathered eight male stars to bare all. It attracted a not entirely unsurprising 5.4 million viewers, with the one-off marking the 20th anniversary of the iconic film, but also raising awareness of men's cancers.

Elsewhere in factual, access documentaries continued to prove popular. From UKTV's *Inside the Ambulance* which places cameras on paramedics to take viewers closer than ever to the work of frontline lifesavers; ITV's *Inside the London Fire Brigade* which used special fire cameras to show the range of emergencies they tackled, to Channel 4's *Confessions of a Junior Doctor* and *Extremely British Muslims*, the team behind the latter gaining privileged access to Birmingham Central Mosque for over a year, ensuring valuable insights beyond the usual headlines.

Crime documentaries continue to be ratings winners, and in 2017, ITV launched a new Crime and Punishment strand. Among the highlights were the Sir Trevor McDonald-fronted *An Hour To Catch a Killer* charting 'The Golden Hour' - the initial period of an investigation when every decision made by the senior officer can be the difference between whether or not the murderer is caught and convicted - and *Gordon on Cocaine*, with Gordon Ramsey meeting everyone from anti-narcotics officers to assassins to highlight the trail of criminality, cruelty and death driving its global trade.

Factual highlights for Channel 5 meanwhile included *Rich House*, *Poor House* while one-off documentaries including *The Accused* and *Raped: My Story* received critical acclaim. Channel 5 is continuing its strategy of investing in originations over acquisitions, which has helped it achieve its highest annual ratings share in 13 years and attract new and young upmarket viewers.





Channel 4's *The Trial: A Murder in the Family*, was a groundbreaking hybrid of drama and documentary, stripped across one week; while A+E Networks launched one of the most successful and innovative crime series in 2017 with *Live PD*. The series pulls in 30 live feeds from six cities across America, giving an "unfettered and unfiltered" look into a typical Friday night for the men and women in blue. The feeds are transmitted via 4G technology to a New York-based studio where ABC News's chief legal analyst Dan Abrams, alongside detectives, provides insight and analysis.

BLOCKBUSTER DRAMAS

Crime drama, while perhaps not as prevalent as previous years, included some standout series including Sky Atlantic's *Tin Star*. The stylish, Tim Roth-fronted thriller set in the Canadian Rockies saw an average of 1.74 million viewers tune into each blood-splattered, alcohol-soaked episode. Equally cinematic but infinitely more glamorous was Sky's *Riviera*, a crime story set among the superyachts and vast villas of the South of France.

One of the most-talked about and subsequently most-awarded dramas aired on Sky was the gripping *Big Little Lies* from HBO. However, Sky's biggest-ever audience came courtesy of global juggernaut *Game of Thrones* with 5.2 million cumulative viewers tuning into the series 7 finale and yet more breathtaking battle scenes.

Another drama blockbuster was ITV's *Broadchurch* which saw some 10.7 million tune into the third and final series. Thanks in large part to powerful performances from David Tennant and Olivia Colman, it was an emotional farewell for many fans who took to Twitter in their droves to mourn its loss.

Liar was another enormous success for ITV. A compelling, psychological thriller starring Joanne Froggatt and Ioan Gruffudd, it ended with a dramatic finale which left some 9.1 million emotionally wrung-out viewers in its wake, not unlike *Little Boy Blue*. Written by Bafta-winning Jeff Pope, it centred on the devastating impact on a city of the murder of 11-year-old Rhys Jones in Liverpool in 2007, amid a wave of gang violence. Based on such a tragic true story, it delivered blistering blows.

LASHINGS OF LAUGHTER

Some much-needed humour was duly provided by Sky's *Bounty Hunters*, the channel's biggest sitcom launch since 2011; Channel 4's *Catastrophe* starring Sharon Horgan and Rob Delaney and E4's *Chewing Gum* with inimitable star-of-the-moment Michaela Coel; alongside the more recent *Roast Battle UK* which played over five nights on Comedy Central in January, achieving the channel's best-ever rating for a UK commission.

UKTV's strategy of upping original commissions is also continuing to reap rewards with notable series including *Red Dwarf*, Emmy-nominee *Taskmaster* and *Murder on the Blackpool Express*. Starring Johnny Vegas and Sian Gibson, the comedy drama has been watched by over 1.8 million viewers, helping to drive Gold's biggest growth in 13 years.

“More bizarre than even Noel Fielding were the Ofcom complaints – at the offence caused when the host clambered into a fridge.”



These popular series have also helped UKTV Play become the broadcaster's fastest-growing brand with a 75% increase in views year-on-year, buoyed also by the likes of *Taskmaster: Champion of Champions*, *Dave Gorman: Modern Life is Goodish*, *Dara O Briain's Go 8 Bit* and *Hayemaker Ringstar Fight Night*.

In June, UKTV signed a three-year TV rights deal for Dave with *Hayemaker Ringstar*, which will see five fight nights broadcast free of charge per year.

And we can also expect plenty of laughs from Cartoon Network, which is marking its 25th anniversary in the UK in 2018 with a range of activity including a new season of the BAFTA award-winning *The Amazing World of Gumball*, alongside some new Cartoon Network Originals, including: *Apple & Onion* and *Summer Camp Island*, based on the original short created by British animator and illustrator, Julia Pott. Turner is also building on its strategy of creating a full 360 experience around programming, from games to apps.

COMING UP...

2018 is a major sporting year for other commercial channels with Sky Sports and BT Sport bringing us all the action from key events spanning rugby, football, cricket, tennis, darts and more – as well as Discovery's *Eurosport*, with a lot more to come from there now it has the Olympics from 2022. And we can be assured of more drama and emotion courtesy of ITV as we watch the World Cup, no doubt angst-ridden, live from Russia.

Global events like football aside, there's a growing trend for more localised content as British broadcasters respond to the growth of international SVODs such as Amazon and Netflix. Among Sky's 50 original productions for 2018 is a focus on top British talent, with major new dramas including Benedict Cumberbatch in *Patrick Melrose*, and Suranne Jones and Lennie James in *Save Me*. Meanwhile David Morrissey and Zoe Wanamaker star in *Britannia* – described by one critic as "Thrones meets the most debauched year you ever had at Glastonbury" – which launched to more than 1.6 million viewers.

Channel 5 is also focusing on homegrown programming such as *Wild Britain* and *Yorkshire Housing*, alongside high-profile US acquisitions *Will and Grace* and *The X-Files*, while ITV continues to showcase the nation's best performers in Britain's *Got Talent*, *The X Factor* and *The Voice*, but is also telling uniquely British stories in continuing dramas such as *Vera*, *Unforgotten* and *Victoria*. There's also upcoming comedy drama *Action Time*, which follows a team of special agents working for the British government. Meanwhile new Channel 4 chief Alex Mahon said the broadcaster would be investing in content reflecting a "gritty, urban" nation to better reflect all views in Brexit Britain. If that all sounds a bit serious, it's also offering uniquely British comedies including the brilliant *Derry Girls* and the upcoming *Lee & Dean* about two cockney builders. A sitcom based in Stevenage and full of cheap lager and bad poetry? It doesn't get more British than that. ■

“It was an emotional farewell for many Broadchurch fans, who took to Twitter in droves to mourn its loss.”

OPPOSITE *Extremely British Muslims*, Channel 4
ABOVE *Tin Star*, Sky Atlantic

Forever young: how TV keeps young audiences tuned in

Younger people watch loads of TV. If that sounds weird, it shouldn't – have a look at the facts on p. 12. Here, John Plunkett takes a look at some of the youth hits in 2017 and what made them so popular.



JOHN PLUNKETT
Journalist and
Thinkbox columnist

On the surface ITV2's *Love Island* and *The Great British Bake Off* on Channel 4 may not appear to have too much in common.

And yet both shows capture the powerful and enduring appeal of television for young people, capturing record audiences for their respective channels with millions of 16 to 34-year-olds tuning in.

In a digital era which has seen an explosion of choice in terms of devices, channels and platforms, they were a robust statement of the power of must-watch, appointment-to-view linear TV.

Love Island's biggest episode was watched by 3.8 million viewers across all platforms, and 58% of its viewers were 16 to 34-year-olds.

Its ITV stablemate *I'm A Celebrity...Get Me Out of Here!* launched with 12.7 million viewers, the channel's biggest audience of the year, including 3.7 million 16 to 34-year-olds.

But perhaps we should not be surprised. Young people spend more time with TV than any other medium and are the most enthusiastic adopters of new forms of TV.

Live TV is the single most popular form of video for 16 to 34-year-olds, accounting for 33% of their viewing time (rising to 49% when playback and broadcaster VOD is included).

"Young people are still watching TV, they are just watching it differently," says Richard Cowles, creative director, entertainment, at ITV Studios and executive producer of *Love Island*.

"Around half of our viewers watched *Love Island* via the ITV Hub (ITV's online video-on-demand service) because they don't have control of the remote and they are watching via their phones and their computers."





“There is definitely an appetite for television, we have just got to evolve as quickly as that audience is evolving. There is always going to be an appetite for great content.”

The Great British Bake Off ended its first Channel 4 series since moving from BBC1 with more than 11 million viewers, the channel’s biggest audience for more than 30 years.

Just as significantly, perhaps, the series averaged 2.6 million 16 to 34-year-olds per episode across the course of its run.

“The main source of video for 16 to 24-year-olds or 16 to 34-year-olds remains live TV and a point I try to get across is to stop thinking of young people as a completely separate species or a divorced, separate animal,” says Ben Marsden, head of audience research and insight at Channel 4.

“Most of them have very mainstream tastes and you’ll find the most-watched programmes among 16 to 34s are the big shows that we all know – Bake Off, I’m A Celebrity, Britain’s Got Talent.

“Young people like the same entertainment and drama as the rest of the audience, and if you are trying to reach a large number of young people you do that by making big, brilliant shows.”

Shows like Love Island and Celebrity Big Brother on Channel 5 are different in that they attract smaller audiences but with a much higher percentage of younger viewers.

Celebrity Big Brother was Channel 5’s number one show for young adults last year, hitting a peak market share of 35% of 16 to 34s.

Doug Wood, director of research and insight at Celebrity Big Brother producer Endemol Shine Group, says: “We are very conscious that habits are changing and the way we watch TV is changing, but young adults are still watching content, just in different places.”

MTV’s Geordie Shore was the third most popular show for 16 to 34-year-olds in cable and satellite homes last year, behind Love Island and Sky Atlantic’s Game of Thrones.

Key to reaching younger viewers is knowing your target audience inside out, says Kelly Bradshaw, vice president, brand lead, of MTV UK, Northern and Eastern Europe.

“We really do make it our business to know our audience better than anyone else,” says Bradshaw.

“If you are trying to reach a large number of young people, you do that by making big, brilliant TV shows.”

“We do a lot of research both locally and on a global level, to inform the tone and the content of what we do. We are always looking for those universal truths that we can tap into. Tone is important and authenticity is really key, it’s about reflecting people’s lives.”

Social media is at the heart of shows like Geordie Shore and Love Island. The ITV2 show closely examines viewers’ conversations on Twitter to inform the narrative of the series, picking up on what people are saying and what they would like to see happen next.

Commercial TV reached 87.3% of 16 to 34s every week in the first half of 2017, and 88.5% of under-16s.

Sarah Goldman, director of advertising at UKTV, says: “At UKTV, we are seeing 16 to 34-year-olds watching and enjoying our programmes in large numbers and we will increase the number of hours we commission by a third this year.”

Some of UKTV’s top shows for 16 to 34-year-olds include Taskmaster, with Greg Davies and Alex Horne, Dara O Briain’s celebrity gaming show Go 8 Bit and Dave Gorman: Modern Life is Goodish.

Indeed, current measurement systems may actually underestimate the amount of time younger viewers spend watching TV, a challenge that will be addressed this year when BARB looks to measure TV viewing across all screens and devices.

“TV plays a powerful and substantial role in the lives of our audience,” says Vanessa Brookman, VP, content and creative, at Turner Northern Europe. The broadcaster’s top-rating children’s shows in the UK include The Amazing World of Gumball, Ben 10 and We Bare Bears on Cartoon Network, and Boomerang’s Wacky Races and Dorothy and the Wizard of Oz.

“Kids spend more time watching linear TV than any other media and recent research shows that it reaches around 90% of our target audience in the UK every week,” she adds. “No other platform can aid discovery or grow franchises in quite the same way as TV.” ■

“Young people are still watching TV, they are just watching it differently.”

ABOVE We Bare Bears, Cartoon Network
OPPOSITE Dara O Briain’s Go 8 Bit, Dave

Let's use TV to change minds, attitudes... even society

Rosie Arnold, the Thinkbox Academy president, lays out her agenda for society-changing films that harness the power of TV.



ROSIE ARNOLD
Head of Art, Abbott Mead Vickers BBDO

It's 1972. It's break time at junior school. My friends and I are in the playground, imitating a cartoon polar bear we've seen on TV. But this bear isn't in a TV programme, he's in an ad – "It's frothy, man!" – for a soft drink called Cresta, written by the great John Webster (although, being only 10 at the time, I have no idea who Webster is).

In those days, ads were inescapable. Well-loved. Ad breaks were something you looked forward to. Is that still the case in 2017? Nobody watches TV any more, right?

BUILT ON TRUST

A 2016 survey revealed that people in advertising assume the public watches only 1 hour, 15 minutes of TV a day. But the real figure is 3 hours, 23 minutes. It's telling that TV remains the most effective medium. And people trust it much more than any other.

That's not all I believe. Throughout my career, I have constantly encouraged more women into the creative department – and I hope that by being president of the Thinkbox Academy, I will continue to help that cause.

It's not just women; I want to encourage people with different backgrounds and ethnicities, too. Being a creative is a wonderful career; it should not be an exclusively male, white, middle-class domain.

But I am more ambitious still. I believe that we all have the power to change attitudes, affect social norms and redress the balance in the world – and that we have a responsibility to do that.

Lofty words, I know.

We think we understand the reach of TV, but clearly don't. Last year, for example, more people around the world saw a Unilever ad than saw the Disney film *Frozen*.

We know film can change people's attitudes – that's why companies invest so much in it. This means that, while shaping brands, we can also change prejudices.

Many companies are already championing this thinking. There seem to be two approaches: either an ad champions change, or it subtly tries to shift perceptions of role models and activities associated with gender, race or social class.



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02



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The incredible "#ShareTheLoad" Ariel detergent ad that encouraged more men to do the laundry – all the more extraordinary because it came from India. Or the Amazon Christmas ad that brought together an imam and a priest. Already, this power is being recognised and acted upon around the world.

Alternatively, the message can be embedded in the work. At Christmas, did you register that there was a British Asian family in a Currys ad or, indeed, a mixed race family in the John Lewis ad?

CHECK OURSELVES

Every time I see or write a script, I challenge my own stereotypes. Does it have to be a woman putting the food on the table? Does it have to be a heterosexual couple, does everyone have to be white? Does it have to be a boy who becomes a scientist? Do the elderly people all have to be doddering grandparents? We all need to check ourselves when judging ideas and casting.

When I entered the business, people would always remark that "the ads are better than the telly". I don't hear that any more.

There are, of course, a few campaigns that capture the public's imagination – look at the phenomenon which is Christmas advertising – but we cannot effect real change and influence if we are not entertaining.

So, let's all be brave and optimistic and recognise the opportunities such a great tool as TV can give us. Go forth and make great society-changing films that make this article redundant. ■

"We all have the power to change attitudes, affect social norms and redress the balance in the world."

01 John Lewis, adam&eveDDB
02 Amazon, Joint
03 Currys PC World, Abbott Mead Vickers BBDO

Bringing the TV world together: the Global TV Group

At a time when brand safety, measurement, effectiveness and transparency are all centre stage in the world of advertising, there is one world medium standing the test of time. Guess which one?



KATTY ROBERFROID
Director-General, egta

Yes, it's TV. Don't pretend you're surprised. The endurance of TV across countries, continents and generations is a unifying story – and a measurable reality, as shown by research done by The Global TV Group, the informal grouping of broadcasters' and sales houses' trade bodies in Europe, the USA, Canada, Australia and Latin America.

Studies on TV's advertising effectiveness abound all over the world, from the acclaimed Benchmark series by Dr Karen Nelson-Field in Australia, to Ebiqity and Gain Theory's 'Profit Ability' study commissioned by Thinkbox in the UK (see p. 26), or the great work by the Video Advertising Bureau in the US, all show the power of TV advertising is unmatched anywhere in the world. The resilience of television is not only a local truth and there is much that multinational brands can learn by looking at the common elements across cultures.

The Global TV Group's goal is to promote TV and in 2017 we launched the Global TV Deck to remind advertisers, journalists, tech gurus, agencies and industry peers about the effectiveness and popularity of TV and to prove that TV and online make a powerful combination. There are a lot of myths out there that still need to be corrected.

The Global TV Deck is an invaluable databank of collected insights featuring data from an initial 19 countries and covering topics such as TV's reach, popularity, resilience, trust, impact and effectiveness. The deck will be updated annually with the latest data. The highly trusted sources for the assorted figures include BARB 2016, RTL's TV Key Facts 2017, Eurodata TV Worldwide, Médiamétrie, Kantar Ibope Media, and more. The deck provides the hard evidence marketers need to understand the health of TV. Facts such as...

OVER THE PAST DECADE, TV HAS PROVEN REMARKABLY RESILIENT

Despite the emergence of new SVOD services such as Netflix, HBO or Amazon Prime and the arrival of online video platforms such as YouTube, TV consumption has remained steadfast around the globe. Life stage also continues to be a significant driver of TV viewing, with young people's viewing increasing as they get older and have kids.

TV IN ALL ITS FORMS IS THE WORLD'S FAVOURITE VIDEO

The compiled data shows that linear TV is the leader in terms of daily consumption, with viewing times ranging from 4 hours, 26 minutes in Croatia to 2 hours, 29 minutes in Sweden.

TV REACHES APPROXIMATELY 70% OF A COUNTRY'S POPULATION A DAY, 90% IN A WEEK AND NEARLY EVERYONE IN A MONTH

It is the unique combination of this reach together with the huge volume of time spent watching TV that makes it such a powerful form of advertising. The effectiveness of cross-media campaigns is also clear: the combination of TV and online media drives the highest return on investment.

TV IS ALSO THE MOST TRUSTED FORM OF ADVERTISING AROUND THE WORLD

And remains most likely to make consumers laugh, move them to tears or trigger emotions. With these key insights and more, The Global TV Group is telling TV's new story and helping to meet the needs of advertisers eager for transparent, reliable data and fresh insights. ■

egta is the European trade association for marketers of advertising solutions across TV and radio. Access the Global TV Deck at www.globaltvgroup.com and www.thinkbox.tv



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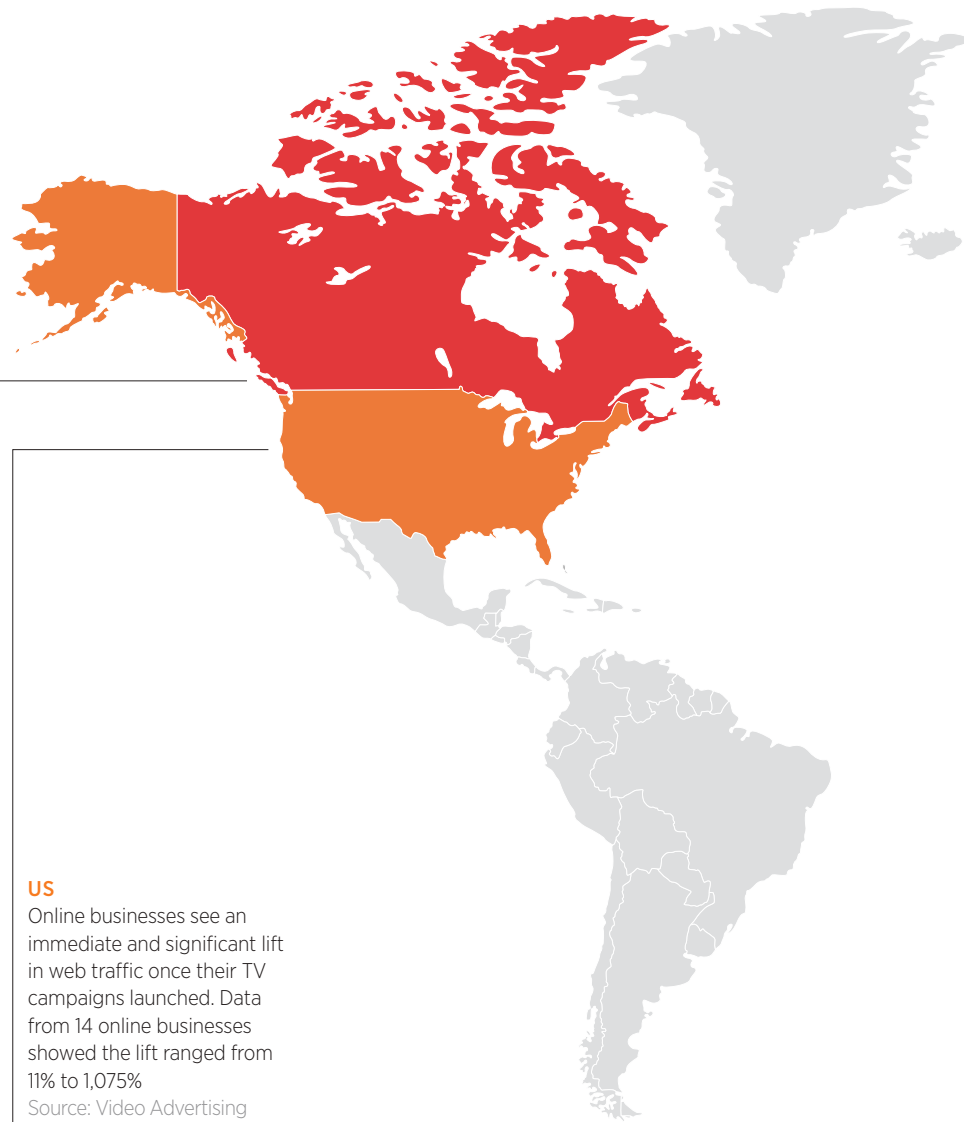


03

01 Dorothy and the Wizard of Oz, Boomerang
02 Fortitude, Sky Atlantic
03 Premier League, Sky Sports

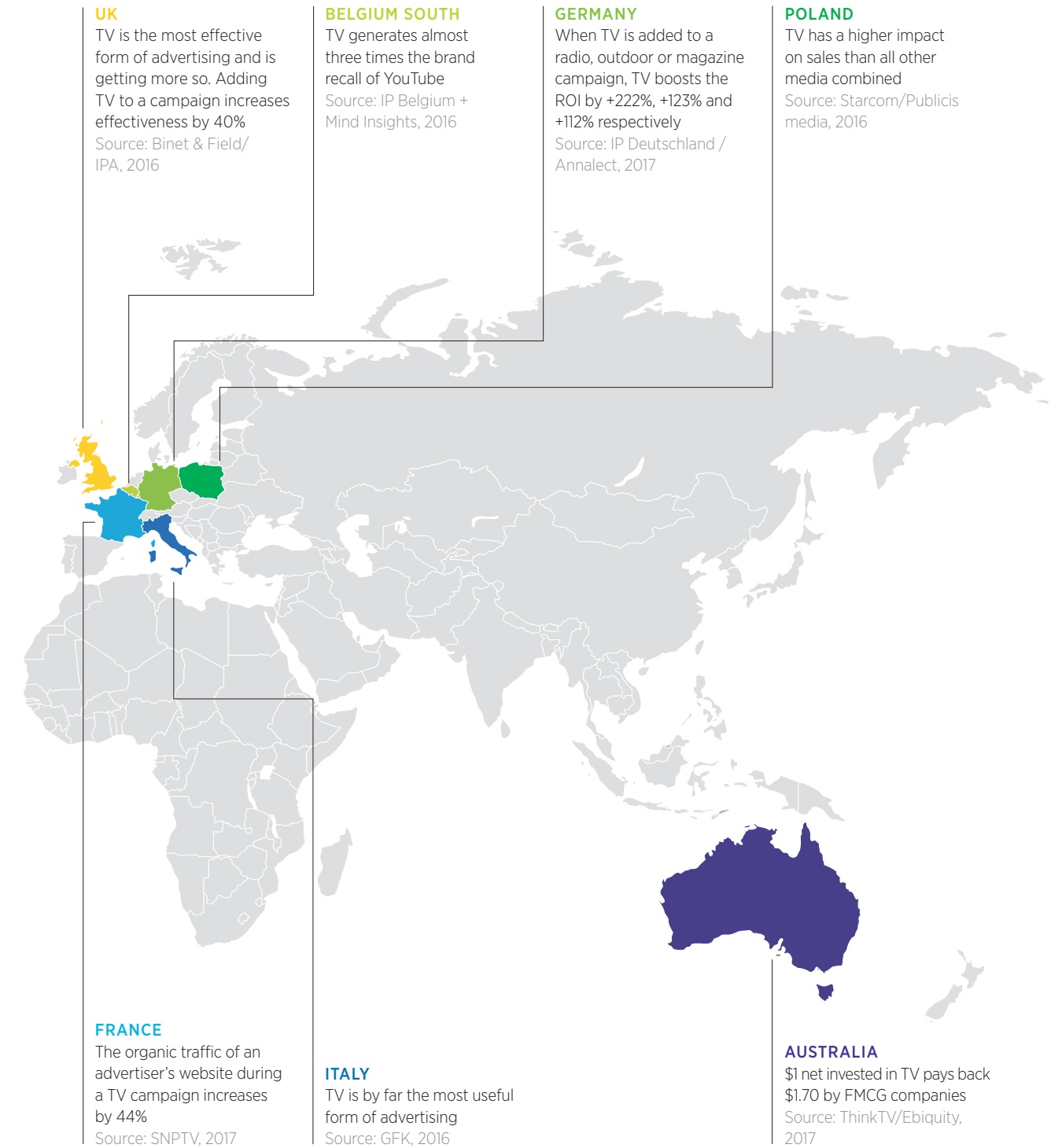
World map of TV research

Studies demonstrating the power of TV and TV advertising are blossoming around the world. Here's a snapshot of some recent ones...



CANADA
TV is by far the most trusted form of advertising. 36% of adults named TV the most trustworthy advertising compared to 10% for internet advertising
Source: nlogic, OmniVu, 2017

US
Online businesses see an immediate and significant lift in web traffic once their TV campaigns launched. Data from 14 online businesses showed the lift ranged from 11% to 1,075%
Source: Video Advertising Bureau / comScore / Nielsen, 2017



UK
TV is the most effective form of advertising and is getting more so. Adding TV to a campaign increases effectiveness by 40%
Source: Binet & Field/ IPA, 2016

BELGIUM SOUTH
TV generates almost three times the brand recall of YouTube
Source: IP Belgium + Mind Insights, 2016

GERMANY
When TV is added to a radio, outdoor or magazine campaign, TV boosts the ROI by +222%, +123% and +112% respectively
Source: IP Deutschland / Annalect, 2017

POLAND
TV has a higher impact on sales than all other media combined
Source: Starcom/Publicis media, 2016

FRANCE
The organic traffic of an advertiser's website during a TV campaign increases by 44%
Source: SNPTV, 2017

ITALY
TV is by far the most useful form of advertising
Source: GFK, 2016

AUSTRALIA
\$1 net invested in TV pays back \$1.70 by FMCG companies
Source: ThinkTV/Ebiquity, 2017

System One: the behavioural science revolution

You wait decades for a marketing revolution
and then two come along at once...



ORLANDO WOOD
Chief Innovation Officer,
System1 Group

While advertisers have been wrestling with the changes in media and data, the 21st century has brought another fundamental shift with huge implications for TV: a revolution in our understanding of human decision-making, rooted in the findings of behavioural science.

The key ideas have been explained in a series of bestsellers, like Daniel Kahneman's *Thinking, Fast And Slow*, Dan Ariely's *Predictably Irrational* or Gerd Gigerenzer's *Gut Feelings*. Humans have two modes of thinking: 'System 1' is fast, instinctive, emotionally-driven, and we're often barely conscious of it; 'System 2' meanwhile is slow, considered, more logical, and effortful.

What the new generation of behavioural science thinkers have done is illuminate just how much more powerful System 1 is. System 1 is our primary decision-making system, with System 2 usually just a rubber stamp for its choices. Where possible, humans prefer to make "fast and frugal" System 1 choices, with results usually good enough for the job in hand. We hate using System 2 and avoid it when we can. In a nutshell: we think much less than we think we think.

Marketers have devoured the science of Systems 1 and 2. But nobody had written a book setting out in simple terms the practical implications for marketing. So we did. 'System1: Unlocking Profitable Growth' answers a crucial question: if human beings are fast and frugal decision-makers, how do you design your marketing for System 1 decision-making?

What we realised is quite how much conventional marketing wisdom relies on the misguided assumption that people think hard about their purchases. Take innovation, for instance. Brands often pin their hopes for new launches on novelty, new benefits, or disruptive technology. But behavioural science tells us that humans have a "gut liking for the familiar". The key to designing innovation for System 1 is to make the new feel comfortably familiar – something we call 'Fluent Innovation': your innovation should feel 80% familiar and just 20% new to make it quick and easy to process and get it accepted.

In the book we also discuss the implications for brand building and shopper marketing. But perhaps the most important implications of the behavioural science revolution – and certainly the most relevant to TV advertisers – are reserved for advertising.



01

Advertising continues to be used as a vehicle for rational product messages, seeking to persuade people with information that, it is believed, will influence their purchases. But this chain of causation assumes we rely on System 2 much more than we really do. In the real world, where System 1 calls the shots, it's the lasting emotional impressions an ad makes that matter most and that lead to long-term market share gain.

This is because an ad that leaves a positive emotional impression – a "somatic marker" as Damasio calls it – tilts System 1 in the direction of a brand when it's time to make a decision. Fluency also plays an important role. Fluent Devices – oft-repeated characters or scenarios, like Compare The Market's iconic Meerkats – also help to build market share over time, as our historical analysis of the IPA's DataBank, presented at Effectiveness Week 2017, demonstrated.

The book explains many of the patterns that Les Binet and Peter Field are seeing in their analysis of the IPA's DataBank. It also explains why long-term emotional campaigns, like John Lewis' 'Thoughtful Gifting' Christmas ads, are so successful in building market share.

If you want to predict effectiveness over the long-term, measure emotional response to your advertising.

The good news for UK TV advertisers is that video is the best way to create an emotional impact, and that TV is uniquely placed with its high-quality content and broad reach. The bad news is that many brands are not yet making the most of this emotional opportunity. We know this, because in 2017 we tested every single FMCG, Financial Services, Automotive, Health and Wellbeing and Charity ad that aired on British TV. TV is the medium to reach and touch people, yet too many ads do not seek to entertain. An opportunity missed, we think. ■

"It's the lasting emotional impressions an ad makes that matter most and that lead to long-term market share gain."

01 Compare The Market, VCCP

Advertising Can Power Growth Beyond Brexit

and TV will play a crucial role

As the Brexit future unfolds, Stephen Woodford, CEO of the Advertising Association, explains his organisation's role in ensuring the UK advertising industry remains world class.



STEPHEN WOODFORD
Chief Executive,
Advertising Association

Growth beyond Brexit is a key focus for the Advertising Association this year as government continues the process of negotiating the UK's departure from the EU and it was the central theme of LEAD 2018, where we heard from leaders including Channel 4's Alex Mahon. Our future depends on creating the best possible environment for advertising and all of us have a role to play in ensuring our success. A success which is critical to the UK's future outside the EU as it embarks on a new relationship with the wider world after 40 years as part of the European economic and political project.

But firstly let's take a look at why advertising – and particularly TV advertising – matters so much to the wider UK economy and why our voice is vital in these Brexit talks. Our latest Advertising Association/WARC Expenditure Report results saw a record third quarter of 2017 with spending rising 3.5% year-on-year to reach £5.4 billion – the 17th consecutive quarter of market growth. These data underpin preliminary figures which show 2017 spending grew to £22.1 billion – representing the eighth consecutive year of market growth. Spend on advertising is showing strong resilience, at a time of real uncertainty for UK business.

Credos, advertising's think-tank, has shown that for every £1 spent on advertising, the economy benefits by £6 as a whole. Annually, this contributes over £120 billion to total UK GDP and supports almost one million UK jobs. And investment in TV advertising plays a vital role in this economic power.

As the recent 'Profit Ability' study by Ebiquity and Gain Theory shows (see p. 26), TV remains a hugely effective force for advertising and, by extension, the wider UK economy.

I'm hugely proud to be part of an industry that matters like this but, even better, let's remember we are world class and much of that work is showcased on TV, here in the UK and around the world. In the past 15 years, we have won over 1,500 Cannes Lions, more than any other European country and more per head than any other country worldwide.

If we want to remain world class, we need to ensure frictionless access to global markets, which will be vital for service industries, as well as for manufacturing. Yet, we must remind government at every turn that the UK's advertising prowess is also dependent on us being open to the world's best talent. The vital importance of freedom of movement for advertising talent in our industry lies at the heart of our recent initiative – the 'Advertising Pays 6: World Class Talent, World Class Advertising' report and associated 'Great Advert for Britain' advertising campaign. Data from our project partner, LinkedIn, showed 57% of advertising's talent, including UK-based international colleagues, works outside of London, proving we are an industry represented across the whole of the UK. Continuing the campaign, our team recently hit the road interviewing industry creative talent from a range of media, including ITV and STV, for a new film. We wanted to bring to life just how the nations, regions and cities across the UK are developing their own specialist identities.



The film is a record of the incredible advertising talent we have across the country and which is a vital part of how we can generate economic and social growth across the UK. This talent – all of it – is fundamental to our future success.

Another strategic focus for us in 2018 is to drive the uptake of advertising services by SMEs across the UK. This drive to attract new SME advertisers followed recent analysis by advertising's think-tank Credos, which shows SMEs only account for around 18% of total advertising spend, despite contributing nearly 40% of UK turnover.

The initiative aims to encourage more advertising among SMEs with a targeted plan to launch new industry knowledge hubs, offering advice and information about advertising to SMEs. We will be running two pilots in Scotland and the West Midlands later this year and will be talking to local authorities, LEPs and other bodies about how they can help. Television has an important role to play in this strategy and we are keen to help SMEs understand how they can grow through advertising on media including TV.

However, beyond the economic factors underpinning the importance of advertising in a post-Brexit UK, our industry also has a significant social role to play. As participants in an advertising eco-system that embraces people of all genders, races, sexualities and identities equally, we must ensure our behaviour reflects the expectations of society, and therefore preserve our right to self-regulate properly and effectively.

This social responsibility extends into areas for consideration surrounding gambling advertising, as well as HFSS food & drink, where we must take account of what the public and regulators wish to see from the advertising industry. As one of the most visible forums for advertising and one with near universal penetration, we know TV will play its part in being a ready and willing corporate citizen.

Ultimately, as professionals within the industry we all have a role to play in ensuring our products – advertisements – are trusted, valued and have a real economic and social impact. For over 90 years, the Advertising Association has been the voice of the sector and we are determined to continue promoting the role, rights and responsibilities of advertising at this pivotal time for our industry and the UK as a whole. ■

“Our future depends on creating the best possible environment for advertising and all of us have a role to play in ensuring our success.”

ABOVE
MoneySuperMarket, Mother



Cream of the crop: 2017's award winners

Cracking creativity

The Thinkboxes 2017

A decade of The Thinkboxes? That's right. Count 'em. Ten years of breathtaking, eyebrow-raising, motivating, tear-jerking, occasional ass-twerking creative excellence. And the 10th year has been as high quality as the previous nine with lashings more TV advertising brilliance to celebrate.

The awards are judged by the 200 talented people that make up the Thinkbox Academy. These are all senior individuals from the advertising industry who have previously won awards for their TV advertising work. And The Thinkboxes not only champion the UK's world-beating TV ad creativity in all its forms; crucially they also celebrate the fundamental role of the client in the creative partnership. We are privileged to give all the minds behind great TV advertising the recognition they richly deserve.



JANUARY/FEBRUARY

The Winner Sport England
The Ad 'Phenomenal women'
Client Kate Dale
Agency FCB Inferno
Creative Team Al Young, Ben Edwards, Martin McAlister
Production Company Somesuch
Director Kim Gehrig

"We've stayed true to our original formula, showing real women and girls playing sport and getting active. Our ambition is still about overcoming judgement, but we feature new messages to empower women – with a range of new and returning faces."

Kate Dale
 Head of Campaign Strategy, Sport England

RUNNERS-UP

Finish 'Combinations' Wieden + Kennedy London
 IKEA 'Win at Sleeping' Mother
 McCafe 'Madness' Leo Burnett London
 Sainsbury's 'Food Dancing' Wieden + Kennedy London



MARCH/APRIL

The Winner giffgaff
The Ad 'The Big Swim'
Client Tom Rainsford
Agency Who Wot Why
Creative Team Sean Thompson, Matt Gooden, Ben Walker
Production Company Dark Energy
Director Sean Thompson

"This brings to life an important message for us in the most epic way possible. We have always been a disruptive and market-challenging brand. We consistently challenge ourselves with our approach, and foster a creative team of exceptional talent which has produced this latest defining work. Our campaigns continue to punch above their weight, showing there is a better way to do mobile in a noisy market full of Goliath brands."

Tom Rainsford
 Brand Director, giffgaff

RUNNERS-UP

Moneysupermarket.com 'Epic Skeletor' Mother
 Carlsberg 'The Danish Way' Fold7
 Lucozade Sport 'Anthony Joshua - made to move'
 Valenstein & Fatt
 Virgin Media 'This is Fibre' BBH London



MAY/JUNE

The Winner TK Maxx
The Ad 'Why Would Anyone Shop at TK Maxx?'
Client Deborah Dolce
Agency Wieden + Kennedy London
Creative Team Hollie Walker, Freddy Powell, Mark Shanley, Paddy Treacy, Tony Davidson, Iain Tait
Production Company Bold
Director Adam & Dave

"'Why would anyone shop at TK Maxx?' is a conversation that happens at pubs and dinner tables around the country which we are delighted to bring to life."

Deborah Dolce
 Group Brand & Marketing Director, TK Maxx

RUNNERS-UP
 Finish 'I Love Doing Dishes' Wieden + Kennedy London
 Marks and Spencer 'Spend it Well' Valenstein & Fatt
 Pride in London 'The Apology' WCRS
 Uber 'Effortless Night' BBH London

JULY/AUGUST

The Winner Volkswagen
The Ad 'The Button'
Client Glyn Butterworth
Agency adam&eveDDB
Creative Team Ben Priest, Richard Brim, Ben Tollet, Richard Gayton, Darren Beresford
Production Company Independent Films
Director Gary Freedman

"'The Button' is our light-hearted way of addressing a serious point: namely that today's updated Golf GTE is the antithesis of the 'worthy-but-dull' hybrid car image."

Glyn Butterworth
 National Communications Manager, Volkswagen

RUNNERS-UP
 BT Sport 'Being Dele' Abbott Mead Vickers BBDO
 McCain 'We Are Family' adam&eveDDB
 Nike 'Smile' Wieden + Kennedy London
 Kwiff 'Caught Glass' Droga5

SEPTEMBER/OCTOBER

The Winner Audi
The Ad 'Clowns'
Client Benjamin Braun
Agency BBH London
Creative Team Ian Heartfield, Dough Fridlund, Mikael Alcock
Production Company Rattling Stick
Director Ringan Ledwidge

"We wanted to convey a serious message about Audi's cutting-edge road-safety technologies in a bright, witty and engaging way... It was the latest in a series of themed campaigns, which pressed home the message that our cars are not just beautiful - they have amazing brains, too."

Benjamin Braun
 Marketing Director, Audi UK

RUNNERS-UP
 MoneySuperMarket.com 'Epic Lift' Mother
 Warburtons 'Pride and Breadjudice' WCRS
 Marmite 'Gene Project' adam&eveDDB
 Sainsbury's 'What's For Dinner?' Wieden + Kennedy London

NOVEMBER/DECEMBER

The Winner Marks and Spencer
The Ad 'Paddington and the Christmas Visitor'
Client Rob Weston
Agency Grey
Creative Team Vicki Maguire, Henrik Ridderheim, Jonathan Marlow, Sam Daly, Rob Greaves
Production Company Rattling Stick
Director Daniel Kleinman

"The 'Spend it Well' strategy we launched earlier in the year is all about making the most of every moment with the people we love. Paddington is not only one of the nation's most loved characters, but an embodiment of the spirit our customers are looking to see and experience during the festive season."

Rob Weston
 Brand & Marketing Director, Marks and Spencer

RUNNERS-UP
 Amazon 'Give a Little Bit' Lucky Generals
 John Lewis 'Moz the Monster' adam&eveDDB
 McDonalds 'Reindeer Ready' Leo Burnett
 Sainsbury's 'Every bit of Christmas' Wieden + Kennedy London ■

The Thinkbox TV Planning Awards 2017

Versatility, agility, flexibility, adaptability... these qualities of TV advertising and more were exploited by the impressive planning ability on show at the Thinkbox TV Planning Awards 2017. Judges couldn't move for great thinking and strategic excellence. Pity them their near impossible task of choosing the best from the best. But choose they did and we finished with the six category winners plus two highly commended campaigns and two special prizes awarded – and, of course, the Grand Prix. Read on to learn from the best...

thinkbox
tv planning
awards
2017

grand prix
MediaCom

DFS
How 6 years of TV advertising sold £1bn worth of sofas

campaign



BEST ONGOING USE OF TV / GRAND PRIX

The Winner How six years of TV advertising sold £1 billion worth of sofas

Agency MediaCom

Brand DFS

TV has always been at the heart of DFS media plans and a major factor in their fame and success. The challenge to MediaCom in 2011 was simple: move DFS from well-known to well-known AND well-loved without dropping a sale.

MediaCom met this challenge with an ever-evolving approach, employing rigorous audience analysis and time-length evolution to take advantage of everything TV has to offer.

They used Sunday evening drama on ITV; created an interactive microsite on All4; fused DFS customer data with Sky IQ panel viewing data to improve conversion; and, in a media first, they partnered with ITV's Text Santa to be a part of their knitted ad break.

They also embraced product placement to give DFS a starring role in the ITV This Morning studio and partnered with Channel 5 to co-brand their channel idents in the run-up to the Boxing Day sales.

DFS sales have grown consistently every year and show no sign of slowing, whilst "brand love" has seen a 32% increase. Over the last six years, TV alone has generated £1 billion worth of DFS sofa sales. The brand is sitting very comfortably.

HIGHLY COMMENDED
Arena Media, Domino's Pizza

ALSO SHORTLISTED
UM Birmingham, Yorkshire Building Society



BEST USE OF TV INNOVATION

The Winner On Demand Advertising
Agency Manning Gottlieb OMD and adam&eveDDB
Brand John Lewis

John Lewis advertising is synonymous with Christmas. Every year they look to evolve the hotly anticipated launch.

For 2016, Manning Gottlieb OMD treated their advertising like premium programming.

They partnered with Sky to create the first-ever on-demand launch, where content simultaneously went live on the Sky EPG, alongside social, Sky+, Sky Q and Sky Go. The ad took the hero spot on the 'Top Picks' gallery for four days, with additional content available on catch-up.

To support the launch day, they implemented a 130-second linear TV roadblock, along with 120-second VOD placements, ensuring they owned all devices, no matter the user's preference.

The results were outstanding. They saw a 23% increase in ad views on launch day and became Sky's biggest-ever download. Christmas sales rose 4.9% to £998 million, led by their most effective, innovative launch yet.

ALSO SHORTLISTED
 MEC and Anomaly, Freeview
 Goodstuff and The Outfit, Taylors of Harrogate



BEST NEWCOMER TO TV

The Winner Just Nutmeg It
Agency PHD and Abbott Mead Vickers BBDO
Brand Nutmeg

Nutmeg is on a mission to make investment services available to everyone. It had started well as a business but wanted to take it to the next level.

With great creative, courtesy of Abbott Mead Vickers BBDO, PHD chose TV as the main vehicle, because it delivers awareness, education, credibility and trust: and, by embracing the true media of the masses, they would normalise investment and bring it into everyday conversation. Moreover, no other brand in the category was using TV.

With a limited budget, they focused on London (the largest market), running a campaign with 67% peak airtime, supported by VOD, to reach those working during the day.

Out-of-home was used to connect with busy commuting urbanites; news press – away from the financial pages – to further democratise their message; social – to put a human face to the investment team; and synchronised PPC – to harvest interest generated by TV.

The campaign saw brand awareness rise by 300%; a 78% year-on-year increase in branded search; and new customers growing by 54% on the previous year. Nutmeg's story is a great example of how TV generates brand fame and trust in a sector surrounded by jargon and negativity.

ALSO SHORTLISTED
 the7stars and adam&eveDDB, Bulldog
 MediaCom, Pinterest



BEST USE OF TV AND...

The Winner Power of One X Power of Many = Ending Loneliness
Agency Manning Gottlieb OMD and Drum
Brand Age UK

Age UK wanted volunteers to its 'Call In Time' service, where people befriend a lonely elderly person and call them for half an hour every week.

Manning Gottlieb OMD worked with Drum to create a film which brought to life the story of one person's loneliness: Roy, masterfully portrayed by James Bolam.

With less money than other charities but with incredibly powerful content, they decided to focus on one key moment.

ITV's Good Morning Britain provided the perfect platform. The ad launched in a 3-minute ad break takeover during a show dedicated to loneliness. The moment was extended with 60-second cut downs in shows that juxtaposed with Roy's story.

Using Age UK's data, Manning Gottlieb OMD created a loneliness map of the UK, identifying areas needing the most support. This became the foundation for activity that drove local relevance, using outdoor, mobile, digital, Facebook, Spotify and Age UK's owned channels.

Going big on one moment paid off: one in four exposed to the TV activity took action; fundraising increased 4%; and 12 years' worth of volunteer enquiries were generated in just four weeks. The campaign ended 2 million hours of lonely silence for older people in 2017.

HIGHLY COMMENDED
 MediaCom, Tesco

ALSO SHORTLISTED
 MediaCom, Churchill
 Mindshare and Y&R, Marks and Spencer



BEST USE OF TV SPONSORSHIP

The Winner #SuzukiSaturdays
Agency the7stars
Brand Suzuki

The7stars were tasked with delivering sales of the Vitara – a family SUV. Years of consumer research led them to the key insight that Suzuki cars are fun to drive, so they wanted to generate fame and show the brand's fun personality.

They created an extensive partnership with Ant & Dec's Saturday Night Takeaway on ITV that included a licensing and talent deal. As well as sponsoring the show, with entertaining idents created by Red Brick Road, they created special content featuring Ant & Dec and two Suzuki Vitaras in comedy skits and pranks that ran on TV, across branded mobile, social channels and in dealerships nationwide.

As a result, positive opinion of Suzuki rose by 56%, and they posted record UK car sales for the year of over 38,000 units – completely selling out.

ALSO SHORTLISTED
 MEC, Colgate
 MediaCom, Allianz



BEST USE OF CONTENT

The Winner Giving Sainsbury's food a taste of fame
Agency PHD and Abbott Mead Vickers BBDO
Brand Sainsbury's

For the critical Christmas period in 2016, PHD opted for a new approach that would make Sainsbury's Christmas food famous as well as driving purchase.

Once audiences had become familiarised with the new TV ad, the Sainsbury's food range was then integrated into the campaign through a first-of-its-kind content partnership with Googlebox. With a specially created 3-minute version of the programme, the Gogglebox cast were transformed into stop-motion versions of themselves as they talked about the delicious Sainsbury's food on show in the ad.

The engagement score for the break peaked at 79 out of 100 – 23% higher than the control break. Twenty-five per cent of people who watched it said they visited Sainsbury's as a result of seeing the break and 46% of these went on to buy one of the products featured.

ALSO SHORTLISTED

MediaCom, Thomson
 Vizeum and The Story Lab, very.co.uk



BEYOND THE BRIEF – SPECIAL PRIZE

The Winner Awkward Elves
Agency the7stars and adam&eveDDB
Brand Bulldog Skincare for Men

Bulldog Skincare for Men was planning to run their first media campaign to drive Christmas sales with some brilliant creative from adam&eveDDB.

The initial plan was for an online video but with such strong creative the7stars knew there was an opportunity to leverage the emotion and fame of TV, get some real cut-through and drive sales.

With a limited budget, smart and skilful planning was required. The7stars decided to buck the trend of ads targeting men in football shows and target dual viewing programmes to stimulate conversation and reach female buyers. Comedy was a key focus too, marrying a great creative with quality programming.

The campaign had dramatic results with sales up by 25% year-on-year and Bulldog achieving its highest-ever market share at 16.5%.



BEST LOW-BUDGET USE OF TV – SPECIAL PRIZE

The Winner Britain's Next Top Model
Agency MEC
Brand Colgate Max White

The challenge for Colgate was how to launch an innovative new teeth-whitening product with a high price-point into a tough competitive market.

MEC's strategy was to position the Max White toothbrush plus whitening pen as a premium beauty product rather than an oral care brand. Central to this was an integrated partnership with Britain's Next Top Model, which showcased the product as a beauty accessory.

The product was seamlessly and naturally woven into the show, including an episode in which the models created a TV commercial for Max White.

In addition to the product placement and the sponsorship idents, there was a Colgate-branded launch party, co-branded TV spots and additional content for use online and across social media.

80% of viewers were aware of the sponsorship and Colgate grew their category value share by 23%. ■

The judges

Tess Alps
 Chair of Judges and Thinkbox Chair

Zoe Clapp
 Chief Marketing and Communications Officer, UKTV

Lindsey Clay
 Chief Executive, Thinkbox

Zoe Harkness
 Head of Industry Programmes, Thinkbox

Giles Hedger
 Chief Executive, M&C Saatchi

Marianne Hewitt
 Former Head of Brand Marketing, Age UK

Rick Hirst
 Chief Executive, Carat

Mark Howley
 Chief Executive, ZenithOptimedia

Maisie McCabe
 Deputy Editor, Campaign

Michelle McEttrick
 Group Brand Director, Tesco

Andrew Mortimer
 Director of Media, Sky

Dino Myers-Lamprey
 UK Managing Director, MullenLowe MediaHub

Lynne Robinson
 Research Director, IPA

Richard Shotton
 Deputy Head of Evidence, Manning Gottlieb OMD

Mick Style
 Chief Executive, Wavemaker Manchester

Sue Unerman
 Chief Transformation Officer, MediaCom

Sally Weavers
 Founder, Craft Media London

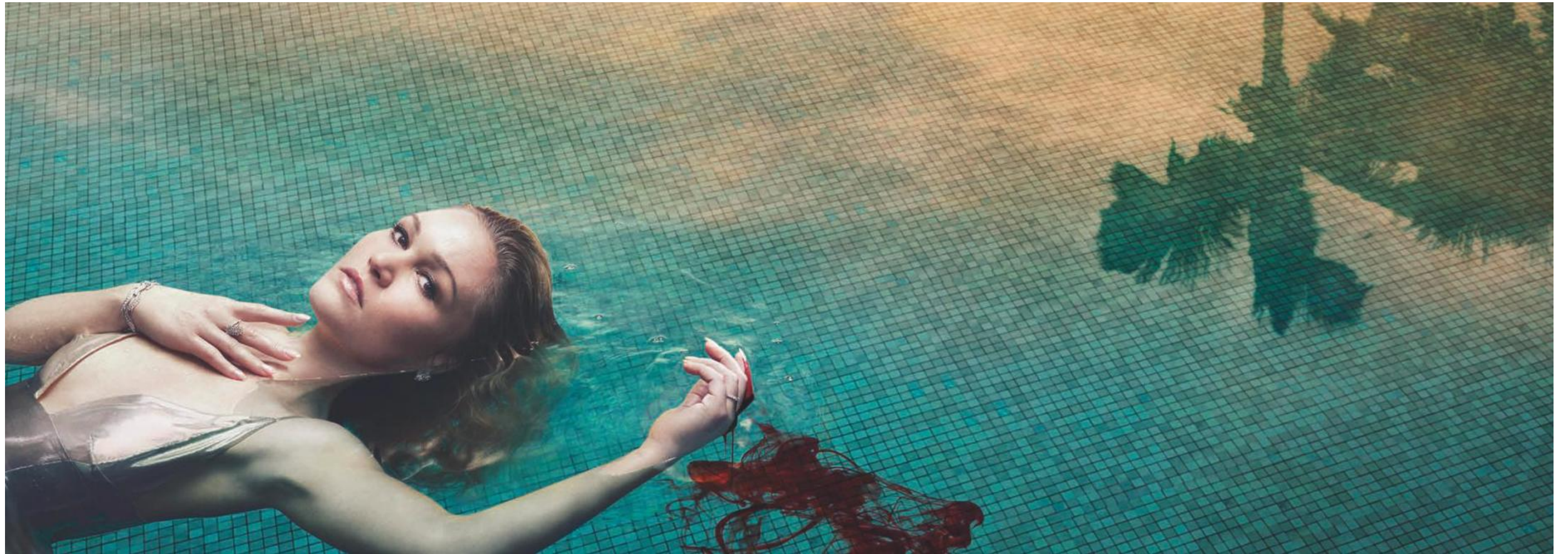
Tom White
 Strategy Partner, Abbott Mead Vickers BBDO

David Wilding
 Director of Planning, Twitter



How can
we help?

WEST MIDLANDS
AMBULANCE SERVICE
A.L.S



Allow us You're here, but should you have come?

Heavens yes, for in this most penultimate of sections we will douse you with help and answer those burning questions you hadn't even thought of asking.

WHAT PAGE WAS 'PROFIT ABILITY' ON AGAIN? THAT BUSINESS-CHANGING GOLD BEARS REPEAT READING

Page 26. Econometrics is catnip to the smart marketing professional.

IT SO IS. WHERE CAN I GET MORE PREMIUM QUALITY RESEARCH?

You could do worse than having a look at the Research section on www.thinkbox.tv

A WEBSITE EH? FANCYPANTS

Yes. And not just any website. This is the ultimate TV advertising website. Inspiring case studies? Check. Awesome ad galleries? Check. Guides on using TV? Check. Petr Čech? No, he's Czech.

TELL ME ABOUT YOUR NEWSLETTER

Thought you'd never ask. We have a newsletter. It's great. It's fortnightly. You can sign up via our website, but only if you need the latest insight and inspiration from the world of TV. Otherwise it will be wasted on you.

IS IT AS GOOD AS THEY SAY IT IS? Better.

HOW ABOUT YOUR TRAINING?
If it was food, it would have a Michelin star. In fact, it is food; **MARKETING MIND FOOD.**

GET ON WITH IT

Our training workshops are free to anyone working at a UK advertiser, a media or advertising agency, or for one of Thinkbox's associates, shareholders, or their partner companies. Details on upcoming workshops are on our website, or get in touch if you want something tailored to your needs.

WHAT DO YOU LOOK LIKE?

Clean, professional, well lit. If you'd like a closer look, we'd be happy to come and present the latest on TV face-to-face. In 2017, we did 282 presentations to agencies and advertisers around the UK and abroad. Or, if you have an event that needs some TV expertise on stage, we're here for you. Just contact kate.allinson@thinkbox.tv.

I ENJOY BRILLIANT SPEAKERS GIVING INSIGHTS ON FASCINATING TOPICS. ANY ADVICE?

You would like our events. They are themed around the latest research and the big themes the industry is tackling. The speakers are always top drawer. Our newsletter will keep you posted on what's coming up.

ARE THERE PASTRIES?

Industrial amounts.

I'VE NEVER ADVERTISED ON TV BEFORE, WHAT SHALL I DO?

Are you advertising yourself or do you have a product or service? If the former, try Tindr. If the latter – or for any other questions about TV advertising – either email planning@thinkbox.tv or call on 020 7630 2320. There's never been a better time to get on TV. ■

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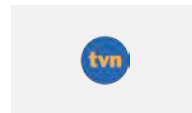
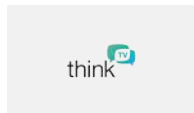
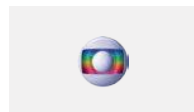
ABOVE Riviera, Sky Atlantic

With thanks to...

SHAREHOLDERS



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