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Annual Review

# A Year in TV 2014



thinkbox

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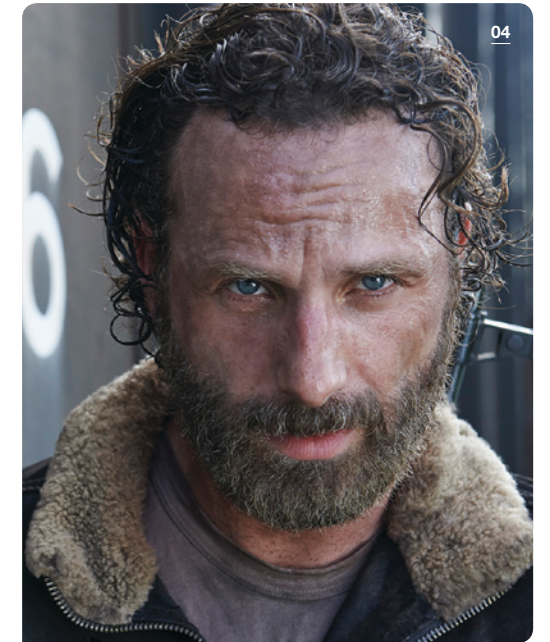


# Who we are

Thinkbox is the marketing body for commercial TV in the UK, in all its forms - broadcast, on-demand and interactive. We work with the marketing community with a single ambition: to help advertisers get the best out of today's TV.

Thinkbox's shareholders are Channel 4, ITV, Sky Media, Turner Media Innovations and UKTV, who together represent over 90% of commercial TV advertising revenue through their owned and partner TV channels. Associate Members are RTL Group, Virgin Media, London Live, Norway's SBS Discovery and Australia's ThinkTV. Discovery Channel UK, UTV and STV also give direct financial support.

TV today has more to offer advertisers than ever before, not least because this growing medium remains at the heart of popular culture and advertising effectiveness. From understanding how audiences engage with TV advertising, uncovering what the latest technological developments mean, explaining innovative and affordable solutions, and encouraging creativity to providing the rigorous proof of effectiveness that advertisers need, Thinkbox is here to help customers meet their marketing objectives.



Thinkbox.tv  
 @Thinkboxtv  
 thinkboxblog.brandrepublic.com

01 **Adventure Time with Finn and Jake** Cartoon Network

02 **Crisis Watch**

03 **The Undateables** Channel 4

04 **The Walking Dead** Fox

05 **The Great Fire** ITV

# Foreword

## by Lindsey Clay, Chief Executive

Record ad revenues, new effectiveness research, a new viewing eco-system emerging and a new Harvey the dog ad – TV had it all in 2014.

(I'm supposed to say 2014 was a year 'of' something aren't I? Can't say 'mobile', that's every year. Can't just say 'TV', I've used that before. How about 'change'? True, but too vague. 'The year TV's future arrived'? Yes, that works.)

2014 was the year TV's future arrived. After years of record growth for broadcast TV as on-demand began to flower, new viewing trends became more established in 2014 and there's a new eco-system emerging. The new world of TV reflects what people want from TV and it raises new opportunities for advertisers. But it is a royal pain in the arse for BARB to measure. However, we welcome it and Thinkbox is here to help advertisers get the best out of it. Have a look at page 08 for a guide to how viewing is changing and the reasons why.

What else happened in 2014? Many wonderful things as it turns out. Let's list some of them:

- TV advertising revenue in the UK hit a new record high of £4.91bn (see page 18)
- Ebiqity published 'Payback 4', revealing TV advertising's unrivalled and increasing effectiveness (see page 24)
- Our third 'Screen Life' study lifted the lid on how we're watching TV these days (see page 26)
- And, of course, Harvey the dog returned to TV ad breaks with the love of his life, a magnificently coiffured poodle named Harmony.

Some less wonderful things in 2014 were the revelations of rampant fraud in online display advertising. There seemed to be a new one every week. Google says over half of online ads aren't seen by humans – and other reports suggest that might be a conservative figure. This isn't a competitive moment of schadenfreude; an increasing amount of TV advertising is consumed online. This is a problem for everyone and I hope it can be stamped out pronto. One thing though: it puts BARB's brilliance into perspective.

01



02



“The new world of TV reflects what people want from TV and it raises new opportunities for advertisers.”



03

And talking of accurate measurement, 2015 is Thinkbox's 10th birthday! Time does fly when you're publishing econometric studies and training a dog to mow the lawn. We have travelled a long way since we began. To put it in perspective, the average viewer has spent over a year and a half of their life watching TV since we were set up in 2005.

Our birthday is a good reason to pause and think about what we have learned about TV in the last decade and what to hope for in the next. To this end we have assembled some clever and talented people who have all stopped being brilliant in their day jobs for a moment to share their thoughts. Turn to page 34, to see what Jen Smith, Nigel Walley, Craig Inglis and others think.

Though 2014 was a year of change, one thing that has been notably consistent over the last 10 years is the high-quality content from our broadcasters. The importance of TV content can never be overestimated because it creates the effective environment for advertisers. This area is something the Advertising Association has looked at recently in its 'Advertising Pays 3' study by Deloitte, which revealed the impact advertising has on bringing people the content they crave. On page 38 we have gathered together the programme chiefs from each of our shareholders to reflect on last year's successes and also tip us off about some gems viewers and advertisers can look forward to this year.

What can advertisers expect from TV in 2015? Well, alongside beautiful spot ads, Broadcaster VOD advertising will continue to blossom at the most trusted, premium end of the online video spectrum. It now has addressability on Channel 4 which is leading to brilliant work such as the recent personalised Coke campaign. And advertisers can invest in addressable advertising in linear TV via Sky AdSmart, which is attracting businesses that would never have considered TV before. Brands getting even closer to content in partnership with the broadcasters will gather pace, with sponsorships, advertiser-funded programming and product placement now well established. And the strengthening of the marriage between TV and mobile screens will continue as brands refine their understanding of how to harness the immediate effects of TV.

So lots on, and I hope the following pages fill you with the enthusiasm for, and confidence in, TV that we enjoy. We're not alone. As Enders Analysis put it in a recent report on the future of TV advertising, TV "will continue to be the core brand advertising medium in all market territories for the foreseeable future". I can't think of a more exciting moment for TV in the last 10 years than now. It does look like 2015 will be a year of TV. Again.



04



05



06

01 **The Last Leg** Channel 402 **Fortitude** Sky Atlantic03 **Rizzoli & Isles** alibi04 **Harvey and Harmony**  
The Red Brick Road05 **Regular Show** Cartoon Network06 **The French Open** ITV

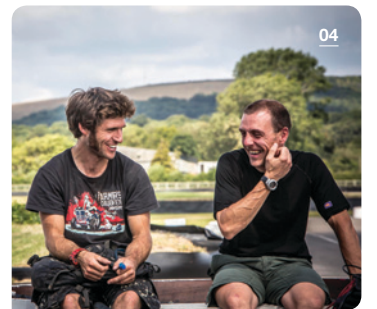
**LINDSEY CLAY**  
Chief Executive

# TV in numbers



# TV's future is here

This is a section to read carefully. 2014 was the year TV's future stopped knocking on the door and came in. After broadcast TV reached record levels as on-demand began to flourish, new patterns of viewing are emerging and there's a new TV landscape taking shape. It is nuanced, it raises new opportunities for advertisers, it reflects how modern viewers want to enjoy TV and it raises measurement challenges. But, it is here, it is the future and we should embrace it, understand it and help advertisers make the most of it. Here's how TV viewing looks...



## ALL TV IS VIDEO, NOT ALL VIDEO IS TV (ALTHOUGH MOST OF IT IS)

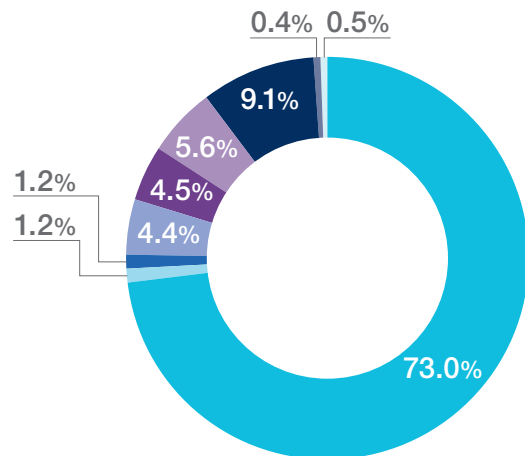
There are lots of different types of video, including linear TV, Broadcaster VOD, non-TV online video (YouTube and 'adult' video mainly), subscription VOD like Amazon Prime or Netflix, cinema, and screens on underground escalators. Obviously there is a huge variety in the quality of the content (and the advertising context).

In the absence of a single source we've tried to put TV into a broader video context by using a variety of recognised research studies. In total, the average person in the UK watches 4.5 hours a day of video in all its different forms (see chart adjacent). TV – watched on a TV set or other screens like tablets and smartphones – accounts for three quarters of the total.

So people watch a lot of TV. In fact, it accounts for just under half of all the time people choose to spend with any medium in the UK, according to the IPA Touchpoints study (see chart on opposite page).

### Total video time in the UK in 2014

2014 share of all video consumption – averages 4 hours 35 mins a day per person. Source: BARB, comScore, Route, IMDB, Rentrak, FAME, DCM, Broadcaster data, Thinkbox estimates, version as of February 2015, subject to change, average includes non users. Based on comScore video reporting on pc only, adjusted using Thinkbox estimates to account for mobile consumption.



- Industry standard TV (live/playback/on-demand on TV set within 7 days of broadcast)
- TV playback/on-demand on TV set within 8–28 days of broadcast
- Broadcaster VOD on other devices (e.g. tablets, smartphones)
- Extra TV content on the TV set (incl. DVD, Subscription VOD, +29 day TV playback/on-demand)
- Extra TV set activity (Gaming/Skype)
- 'Adult' online video
- Other non-TV online video (e.g. YouTube)
- Cinema
- Out of home video (e.g. screens on London Underground)
- Online buying/product info/banking
- Video clips/movies/music online
- Other non-TV online video (e.g. YouTube)
- Newspapers
- Magazines
- Cinema
- Radio

01 Foyle's War ITV  
 02 Barclays Premier League Sky Sports  
 03 Uncle Grandpa Cartoon Network  
 04 Speed with Guy Martin Channel 4

## DAILY TV VIEWING: THE TOPLINE NUMBERS

Based on BARB's standard measurement for TV set viewing and figures supplied by the UK broadcasters to Thinkbox for viewing on other screens, total average daily TV viewing in the UK during 2014 was 3 hours, 44 minutes, 30 seconds a day per person. This comprised:

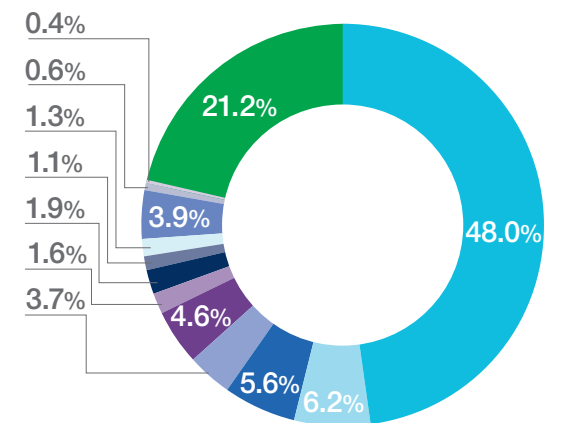
- 3 hours, 41 minutes of linear TV on a TV set (live/playback/on-demand within seven days of broadcast)
- 3 minutes, 30 seconds via devices such as tablets, smartphones and laptops (mostly on-demand but some live streams).

So, 98.4% of our viewing was on a TV set in 2014 and the other 1.6% was on other screens.

Overall, there was a decline in TV viewing of 10 minutes, 30 seconds a day compared to 2013, a fall of 4.5%. This was entirely down to a drop in TV set viewing, which decreased by 4.7%. Viewing on other screens grew year on year by 17%.

## TV accounts for nearly half of the media day

Adults 15+. TV, radio, newspaper & magazine share includes online/app consumption. Includes media which carries content only. Source: IPA Touchpoints 5 2014.



- TV
- Social networking/messaging
- Email
- Internet for work
- Online browsing/info seeking
- Online buying/product info/banking
- Video clips/movies/music online
- Online games
- Other online activity
- Newspapers
- Magazines
- Cinema
- Radio



Taking the long-term perspective though, TV set viewing is higher than it was 10 years ago. Nonetheless, the decline needs scrutiny.

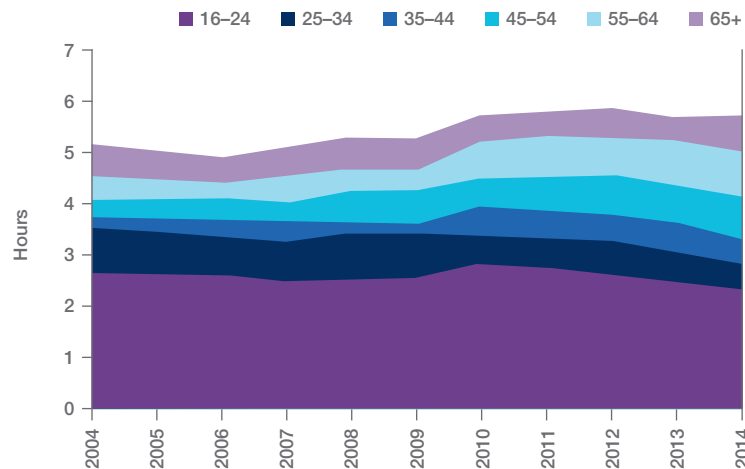
**WHY HAS LINEAR VIEWING DECLINED?**

TV viewing has always gone up and down for various reasons and for all age groups – for instance, there was a boom during the recent recession and the bad winter years and a boom during the digital switchover as more people had more channels to choose from. But the switchover effect has worn off and 2014's dip is not solely down to the improving weather or economy.

One reason is that, as TV embraces new times and places, more viewing is falling outside what BARB includes in its standard measurement (we'll go into this more below). Also the wider choice of on-demand content, from the broadcasters and other services, is shifting the balance of people's viewing. Plus a very significant factor is that...

**Average hours of linear TV viewed per day**

Source: BARB 2004–2014



**HEAVY TV VIEWERS ARE WATCHING LESS**

Remarkably, an analysis of BARB's panel data indicated that 95% of the dip in TV set viewing is accounted for by the heavy TV viewers – those who were watching on average over 4 hours a day – watching a bit less.\* The analysis showed that the number of these heavy viewers declined by 7.2% between 2013 and 2014.

This helps explain why TV's reach has stayed virtually the same (94.6% a week in 2013 vs. 94.2% in 2014). It isn't that some people have stopped watching linear TV; it is that those who were watching the most watched a bit less.

\*As BARB does not generate industry standard audiences based on weight of viewing, this analysis is generated through panel data using members who were active on the middle day of each year analysed (the middle day is the standard industry benchmark for reach analysis). This sample accounts for approximately 84% of all viewing.

**TV'S WEEKLY REACH REMAINS CONSISTENT**



**LIVE THRIVES, PLAYBACK SETTLES**

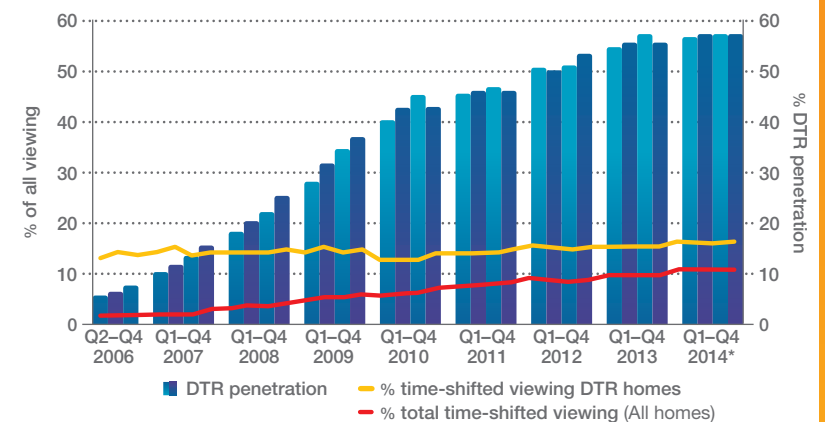
None of this has affected the pre-eminence of live TV. In 2014, 88% of TV set viewing was watched live compared to 89% in 2013. We don't yet have data to show what proportion of TV watched on other screens is live-streamed, however we do have the data for the BBC iPlayer, and that shows that the majority of viewing on other screens is on-demand (90%).

In the 58% of households that own a digital television recorder, 83% of TV on a TV set in 2014 was watched live compared to 84% in 2013. So the level of non-live viewing (i.e. playback and VOD within seven days on a TV set) seems to be settling around the 15–20% mark.

A key thing about playback is that 48% of all recorded viewing is seen within 24 hours of recording and 81% is watched within two days. This shows viewers' desire to stay close to the live schedules.

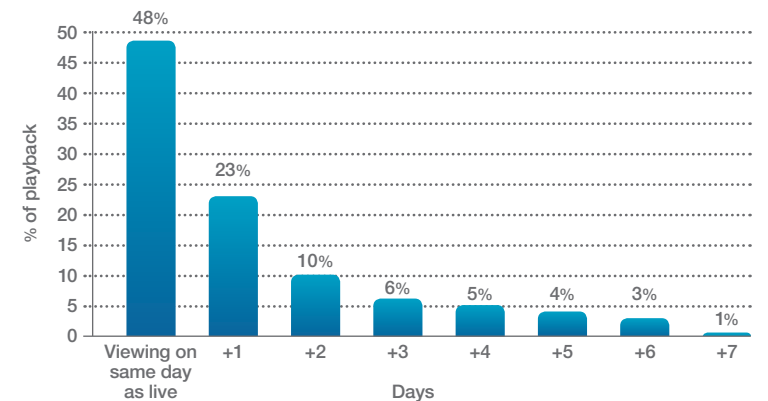
**Time-shifted viewing stable in (DTR) homes**

Source: Sky – 10 Years of Sky Plus (Q2 2006–Q3 2010), BARB Establishment Survey (Q4 2010 onwards), BARB viewing data 2006–2014, individuals. \*Thinkbox estimate DTR penetration Q4 2014.



**People playback promptly: 81% within 2 days**

Source: BARB Jan–Dec 2014 – All recorded viewing, individuals



01 David Attenborough's Natural Curiosities Watch

02 Vikings History

03 Made in Chelsea E4



01

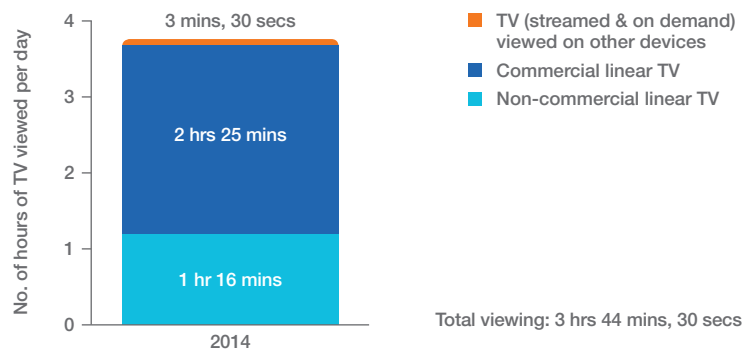
**TV SETS ARE OUR FAVOURITE SCREEN – LIVE OR ON-DEMAND**

You can watch TV wherever you want these days: bathrooms, buses, beaches, boardrooms... you name it. TV accompanies us throughout the day. However, even though viewing on TV sets has dropped a bit, they continue to be our screen of choice by some distance. In 2014, 98.4% of TV was watched on a TV set, with 86% on a TV set in the living room, according to BARB.

You'd expect this for live TV, but the same is true of on-demand. Ofcom's Communications Market Report 2014 found that the TV set is the most popular way to watch 'long form VOD', with an estimated 47% share of that viewing. Smartphones and tablets account for 29%, now more than PCs and laptops, which account for 24%.

**TV viewed on other devices is a small part of total viewing**

Source: BARB Jan–Dec 2014; UK broadcaster viewing on other devices data 2014, individuals



01 **Toast of London** Channel 4

02 **Through the Keyhole** ITV

03 **Alan Davies: As Yet Untitled** Dave

**UPDATE ON BARB'S 'PROJECT DOVETAIL'**

Project Dovetail is a hybrid measurement system that fuses BARB's panel data about TV set viewing with device-based data. It means that the advertising industry will eventually be able to get reliable data about new ways TV is being watched on other devices.

Project Dovetail is ambitious, which is another way of saying it is flipping complicated. Rightly, BARB is going as swiftly as it can without compromising the integrity of the measurement. So it is being delivered in a series of steps.

The latest news is that BARB is deploying software code that provides precise tracking of exactly what's been watched on other devices.

It has received industry ratification for an online audience metric that's comparable with its established average audience numbers, and an equivalent metric for commercials is set to follow soon.

If independent audits of the new software code prove it is working properly, BARB says we should see beta reports appearing in the coming months. For more info, visit [barb.co.uk](http://barb.co.uk).



02



03

**UK device penetration**

Sources: Ipsos Tech Tracker Q4 2014, tablet, laptop and smartphone penetration



**WHAT TV AREN'T WE MEASURING?**

BARB's standard industry measurement – on which TV advertising is traded – only includes in-home viewing on a TV set, live or playback, within seven days of broadcast. However, an increasing amount of TV viewing is happening outside these seven days and out of the home.

Recognising this, since July 2013 BARB has also been measuring time-shifted viewing 8–28 days after broadcast. Including this viewing changes the picture slightly and gives a more accurate representation of how TV is changing.

If we include 8–28 day viewing and compare Jul–Dec 2013 with the same period in 2014 (we can't yet do a full year comparison), then the decline in TV set viewing is actually 3.4%, not the 4.7% that is based on the standard seven-day measurement. And if you also include what BARB calls 'unmatched viewing' (things like non-BARB reported channels) then the decline was only 1.7%.

And, although we are able to tell you how much TV in total is being watched on tablets and smartphones etc. – thanks to data direct from the broadcasters – we can't go into it more than that to show how much different demographics are watching. BARB is hard at work on this.





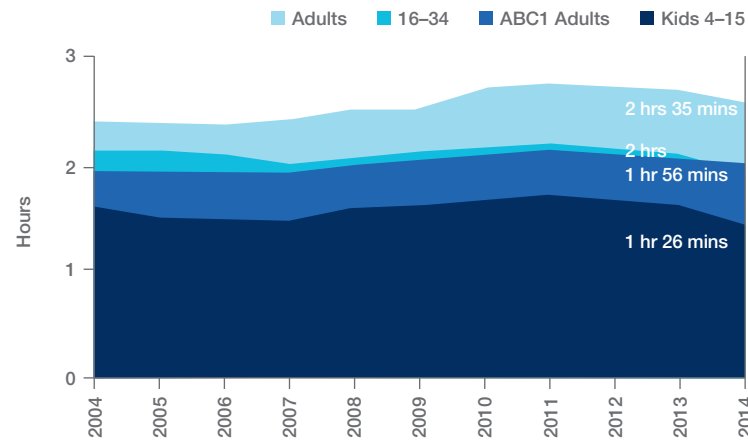
**COMMERCIAL TV DOMINATES VIEWING AND WE WATCHED 45 ADS A DAY**

65.8% of TV set viewing in 2014 was to commercial TV channels, meaning that the average person watched 2 hours 25 minutes of commercial TV a day. Commercial impacts during 2014 decreased by 3.3% compared with 2013 (see chart bottom right). Taking a broader perspective, they have grown by 27% over the last 10 years. The average viewer watched 45 ads a day – seven ads more a day than 10 years ago. Collectively the UK watched an average of 2.65 billion ads a day in 2014.

And, to put the size of commercial TV and TV as a whole into perspective, we've compared average time spent and reach for both with some well-known online media companies (see chart on opposite page).

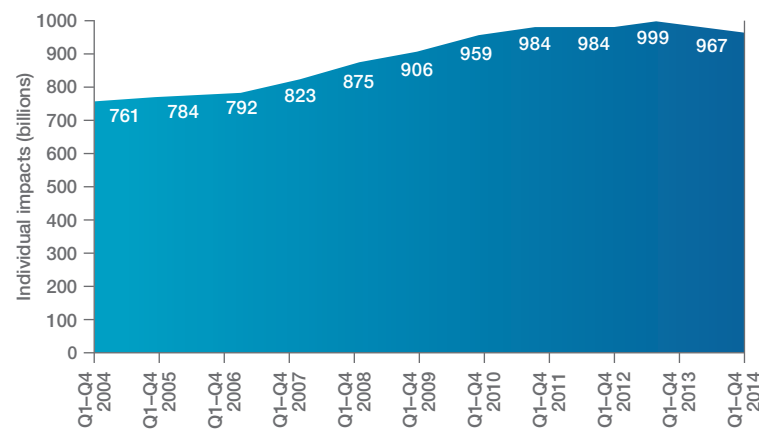
**Commercial TV viewing over time by demographics**

Average hours of commercial TV viewed per day. Source: BARB 2004–2014



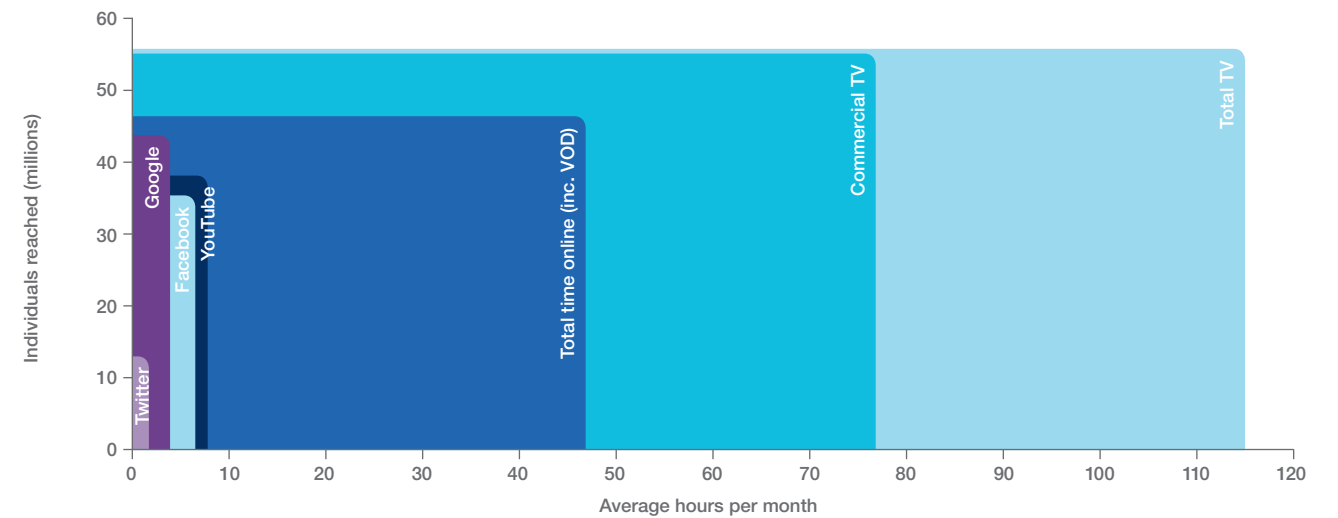
**Total broadcast impacts**

Source: BARB/DDS Jan-Dec 2004–2014 Base: 30" reweighted impacts



**Average monthly reach and time spent**

Note on BARB data: includes in-home linear TV only with all other activity estimated to add an extra 1.6% on viewing for individuals. Note on comScore data: in Oct 2014, MMX MP for total internet included: Audience reach for PC browsing, PC video streams, mobile browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps. Duration for PC browsing, PC video streams, mobile browsing, tablet browsing & apps for tagged sites & apps only. Google, YouTube, Facebook and Twitter are not tagged for their mobile or tablet sites or apps.



- 01 **The Tom and Jerry Show** Boomerang
- 02 **The Jump** Channel 4
- 03 **True Detective** Sky Atlantic
- 04 **Katherine Mills: Mind Games** Watch
- 05 **Britain's Got Talent** ITV



**YOUNGER PEOPLE WATCHED LESS TV, BUT TV REMAINS THE DOMINANT YOUTH MEDIUM**

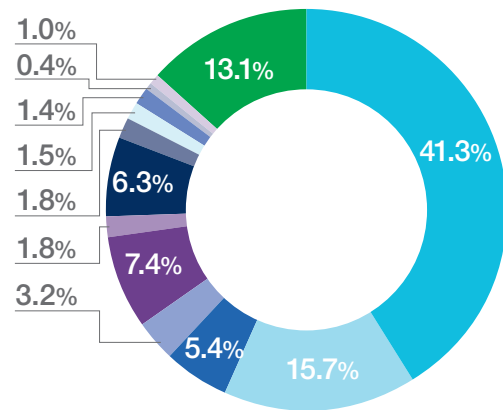
As usual, commercial TV proved especially popular with younger audiences, accounting for 74.8% of 16-34s' viewing. Young people are watching less TV, but it needs to be seen in a grown-up context. 16-34s watched 7.1% less TV on TV sets in 2014 compared to 2013. But they are the fastest adopters of viewing TV via other screens. There are no official BARB figures for that yet but our educated guess would place it at about an extra 4-5% of TV viewing for them, which compares with the extra 1.6% for the average population.

But from other respected sources like IPA Touchpoints it's clear that TV remains the most popular medium for young people (41% of their chosen media time) with its reach and cultural influence undiminished. You just need to look at what young people are commenting about on social media to see the role TV plays in their lives.



**For 15-24s TV accounts for 41% of their media day**

TV, radio, newspaper & magazine share includes consumption via internet/apps. Includes media which carries content only. Source: IPA Touchpoints 5 2014. Base: adults 15-24.



- TV
- Social networking/messaging
- Email
- Internet for work
- Online browsing/info seeking
- Online buying/product info/banking
- Video clips/movies/music online
- Online games
- Other online activity
- Newspapers
- Magazines
- Cinema
- Radio

**THE RISE OF BROADCASTER VOD**

In total – regardless of the screen it was watched on – Broadcaster VOD accounted for 3.8% of total TV viewing in 2014. This breaks down as:

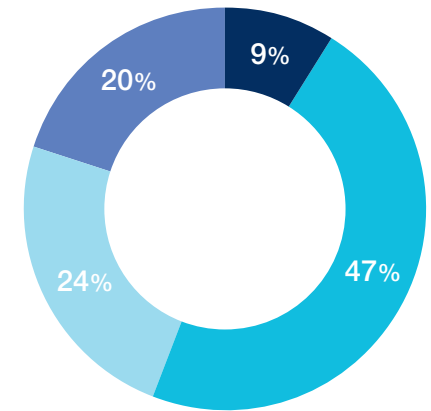
- 5 minutes a day on a TV set (data from UK broadcasters)
- 3 minutes, 30 seconds a day watched on other screens, like tablets and smartphones (data from UK broadcasters).

And, although this may sound small, it is increasing. Ofcom, in its Communications Market Report 2014, found that unique programming requests for 'long-form VOD' had increased by 38% between the second half of 2012 and the second half of 2013, which is the most recent data available.

The chart on the right shows Ofcom's most recent estimated share of long-form VOD viewing by device. We would expect when Ofcom publishes its next Communications Market Report that long-form VOD viewing on the TV set will have increased as a proportion of the total as on-demand becomes even easier to access on TV sets.

**Estimated share of long-form VOD viewing by device**

Source: Ofcom CMR 2014



- TV set
- PC/laptop
- Tablet
- Smartphone



**IN SUMMARY**

In a nutshell, these are the key things to know about TV viewing:

- The structure of TV viewing is changing as the linear/on-demand relationship rebalances
- Average TV set viewing declined a bit in 2014, largely due to the heavy viewers watching a bit less
- Put in context, viewing has returned to the level of 10 years ago – and TV's reach has not changed
- TV viewing on other screens is increasing, for younger people in particular
- All this raises issues for how total TV is measured going forward, which BARB is looking at.

01 **Ninjago** Cartoon Network

02 **Educating the East End** Channel 4

03 **Game of Thrones** Sky Atlantic

# A(nother) record year for TV ad revenue

Look back at the last few Thinkbox annual reviews and the sections on TV ad revenue might give you a sense of déjà vu. This is because TV advertising revenue keeps breaking records, and 2014 was no different.

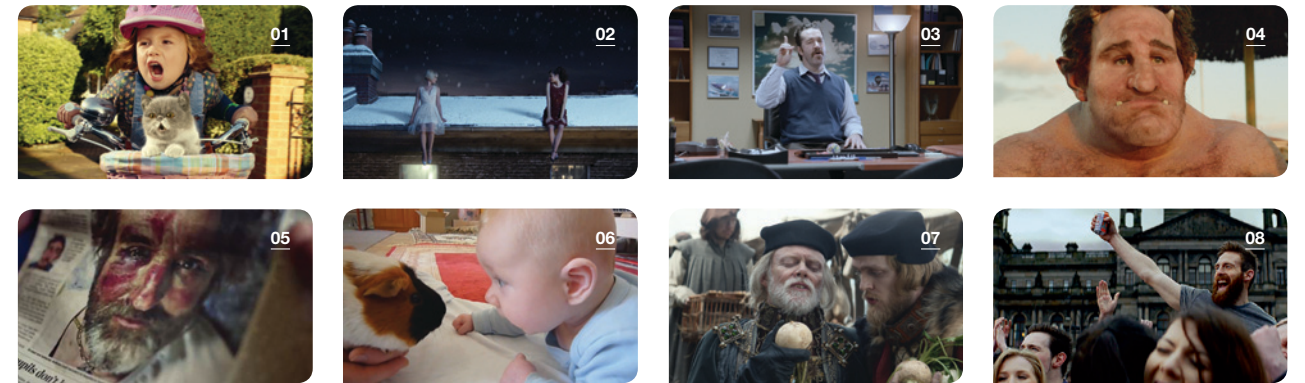
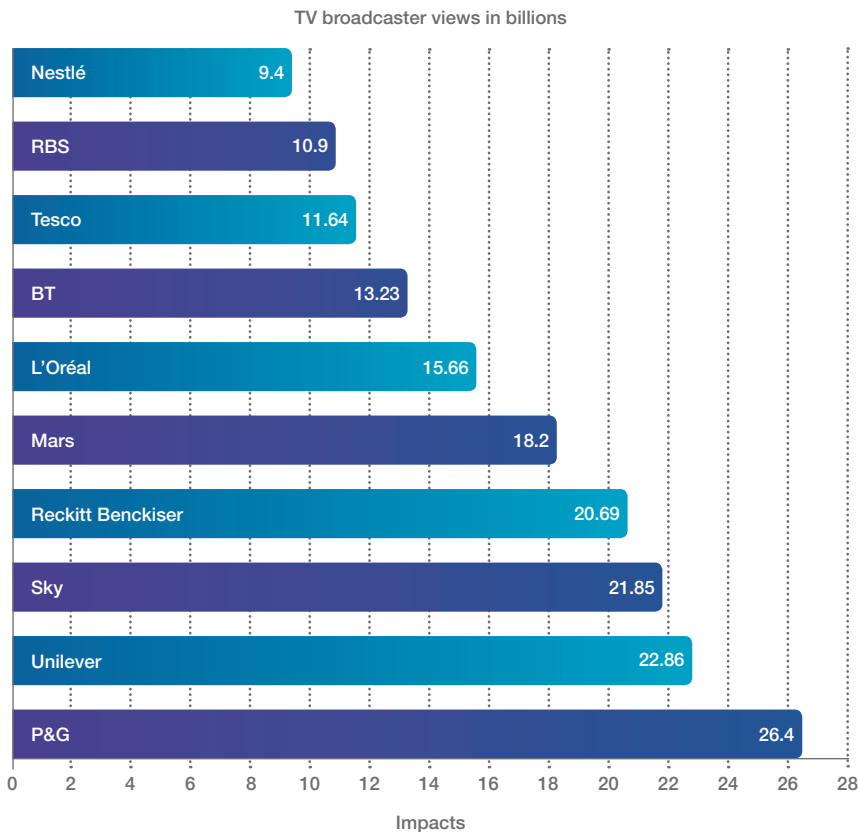
As forecast by Warc for the Advertising Association, TV ad revenue continued to grow in 2014. Revenue totalled £4.91bn (gross of agency commission), up 6% on 2013. This record figure represents all the money invested by advertisers in commercial TV: linear spot and sponsorship, Broadcaster VOD, and product placement.

If you want reasons why TV ad revenue is so strong, look at the evidence from Payback 4 on page 24; its strength reflects TV's unrivalled ability to create business profit and sales. Not to mention the numerous other positive effects it has.

- 01 **Wieden & Kennedy**
- 02 **M&S RCKRY&R**
- 03 **Cadbury Dairy Milk Fallon**
- 04 **Thomson BMB**
- 05 **The Times ad break**  
Grey London
- 06 **Pets at Home**  
Krow Communications
- 07 **Royal London VCCP**
- 08 **Irn Bru Leith**

## The most-viewed TV advertisers by holding companies in 2014

Source: TechEdge – R/W commercial impacts according to BARB reporting Jan–Dec 2014



These effects were enjoyed by the 800 new or returning advertisers to TV last year (returning after no TV advertising for at least five years). Notable newcomers were Ryanair, Swinton Insurance and Booking.com. They may have been attracted by the fact that TV advertising prices in 2014 were some 40.7% cheaper in real terms than 20 years ago.

According to estimates from Warc for the Advertising Association, the total UK advertising market grew to £18.1bn in 2014 (up 5.7%). TV's share of the total market is therefore 27.1%. The AA/Warc forecast that in 2015 the ad market will reach £19.1bn (up 5.6%), with TV growth forecast at 5.5%.

**THERE WERE 800 NEW OR RETURNING ADVERTISERS TO TV IN 2014**

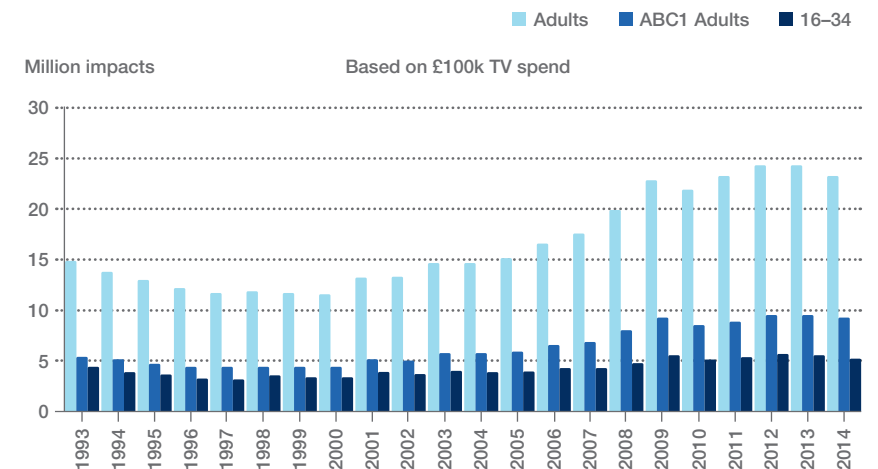
## Growth in total TV revenue

Source: Advertising Association Expenditure Report 2000–2010; 2011–2014 data supplied by the UK broadcasters. Note: Figures are at current prices and gross. Revenue includes TV spots, sponsorship and product placement (Broadcaster VOD from 2011)



## The story of TV's continued value

Source: Advertising Association Expenditure Report 2000–2010; 2011–2014 data supplied by the UK broadcasters. Constant 2014 prices.





# Research, trends & innovation

# Some key TV moments of 2014:

A year's worth of TV innovation and success crammed on to two pages.

## SKY ADSMART LAUNCHES IN LINEAR TV

Brands on board include: Tesco, Royal Bank of Scotland, Littlewoods, American Airlines and Audi.

## SUPER BOWL 2014 DRAWS RECORD AUDIENCE

111.5 million people in the US tuned in.



01

## ITV LAUNCHES ITV ENCORE

New pay-TV drama channel available on Sky.



03

## TURNER LAUNCHES TRUTV

Broadcaster's first free-to-air channel in the UK.

## ITV UNVEILS AD SHOW

New online advertising format that doesn't require video.



05

## CARTOON NETWORK WINS CHANNEL OF YEAR AT 2014 CHILDREN'S BAFTAS

Adventure Time also wins BAFTA for Best International Show.

## CHANNEL 4 LAUNCHES MOBILE INTERACTIVE VIDEO ADS

iVOD ads made available on iOS mobiles and tablets.



06

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

## COMMERCIAL TV IS KING AT THE NATIONAL TELEVISION AWARDS

Wins for commercial treasures including Coronation Street, Educating Yorkshire, and Ant & Dec.

## THE BAFTAS GO TO...

Broadchurch, Gogglebox, A League Of Their Own, The IT Crowd and many more.

## MARMITE 'RESCUE' WINS BEST TV COMMERCIAL OF THE YEAR

At the British Arrows.

## SKY LAUNCHES BUY & KEEP

Enables people to buy and watch movies via Sky Store.

## EBIQUITY'S 'PAYBACK 4' LAUNCHED

TV is found to be most effective ad medium with £1.79 return for every £1 invested.

## THE THINKBOX TV PLANNING AWARDS

Grand Prix goes to Manning Gottlieb OMD for PlayStation.

## TOUR DE FRANCE BIG SUCCESS FOR ITV4

A 33% rise in viewing figures year-on-year.

## THE GUARDIAN EDINBURGH INTERNATIONAL TV FESTIVAL

Channel 4 wins Channel of the Year.

## CHANNEL 4 ANNOUNCES LAUNCH OF ALL 4

4oD will become All 4, a new online home for Channel 4's linear channels, digital content and services in one place, for the first time.

## VIRGIN MEDIA ADDS 15 NEW CHANNELS TO MOBILE TV SERVICE

News, entertainment, music and gaming channels made available on Virgin TV Anywhere.

## THE TIMES FINDS THE PERFECT HOMELAND

Ad break takeover married perfect content and context.

## BT TV EXPANDS SPORTS LINE-UP ON YOUVIEW

Sky Sports 1 and Sky Sports 2 added to existing offering.

## UKTV'S YESTERDAY AND REALLY LAUNCH SERVICES ON YOUVIEW

Viewers can access content through YouView's seven-day scroll-back programme guide.

## GROUND-BREAKING LEGO AD BREAK ON ITV

Coronation Street ad break features well-known TV ads brilliantly recreated in Lego.

## SKY UPDATES ITS EPG

To focus on Sky+ on-demand services.

## TV MANUFACTURERS CAN'T STOP INNOVATING

First LG 4k OLED TV goes on sale in UK.

## CHANNEL 4 BROADCASTS LIVE TV AD

Entire ad break devoted to live performance by Sam Smith to promote Google Play.

## UKTV LAUNCHES UKTV PLAY

New video on demand app service to catch up with Dave, Yesterday and Really.

## FIFA WORLD CUP

ITV attracts highs of 20.3m viewers for England's defeat by Uruguay.

## SKY MEDIA CELEBRATES 24 FINALE WITH STUNT BREAK

First use of licensing from a show integrated into a commercial break.

04



# Payback 4: pathways to profit

Advertisers know that TV advertising works because they see the effect it has on sales and profit - both in the short and long term. But it is essential we continue to prove it and explain why TV is such an effective investment.

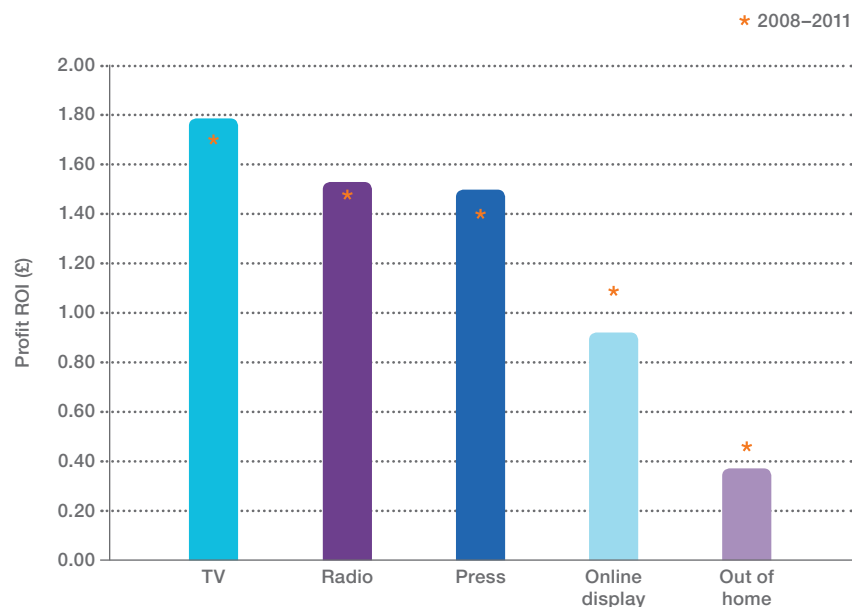
'Payback 4: pathways to profit' from Ebiquity was an econometric analysis of over 4,500 ad campaigns across 10 advertising sectors between 2008 and 2014. It compared, on a like-for-like basis, the sales and profit impact of five forms of advertising: TV (linear spot and sponsorship), radio, press, online display (excluding video on demand) and outdoor. The study updated Ebiquity's 2011 study for Thinkbox, Payback 3. These are the key findings:

### TV IS THE MOST EFFECTIVE FORM OF ADVERTISING

TV advertising delivers more profit than any other medium pound for pound: an average return of £1.79 for every £1 invested during 2011-14 (see right). This echoes recent econometric research by the Radio Advertising Bureau.

### TV advertising generates the most profit

Source: Payback 4 - Ebiquity database 2008-2011 & 2011-2014



“TV has consistently demonstrated the highest ROI over a seven-year period, during a period of unprecedented economic and technological upheaval and change. TV is continuing to demonstrate its value as we see the first real signs of economic growth.”

Andrew Challier  
Effectiveness Practice Leader at Ebiquity

### PRESS AND RADIO ARE NEXT BEST AT GENERATING SALES

TV is on average twice as effective per equivalent exposure at generating sales as the next best-performing medium. Press advertising delivers 52% of the sales uplift TV creates, radio 27%, online display (excluding VOD) 13%, and outdoor 11%.

### TV SHOULD RECEIVE THE LION'S SHARE OF BUDGETS

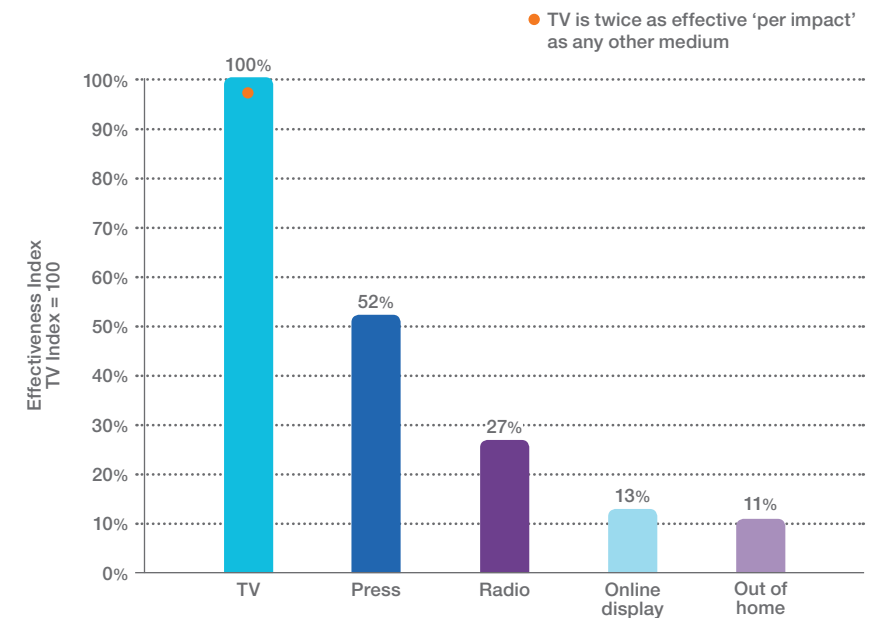
Ebiquity identified the optimum share of advertising budgets that should be spent on TV. For Finance and Retail brands, 60% of the ad budget should ideally go on TV. For FMCG, it should be significantly more than this with Ebiquity identifying a major opportunity for them to increase investment in TV.

### MULTI-SCREENING VIEWERS BOOST BRANDED SEARCH

TV advertising makes other elements of campaigns work harder. TV's effects are felt by all accompanying media, but one of the most significant effects is on branded search. Ebiquity found that the number of branded searches created by TV advertising on search engines such as Google had increased by 33% per rating point during 2011-14 compared with 2008-11.

### TV is the lead effectiveness medium

Source: Payback 4 - Ebiquity database 2011-2014



### TV'S 'HALO EFFECT' ON A BRAND'S PORTFOLIO

37% of TV advertising's effect is achieved on products not directly advertised. So, if a finance brand advertises a current account on TV, the campaign is likely to boost sales of its other products, such as mortgages or insurance.

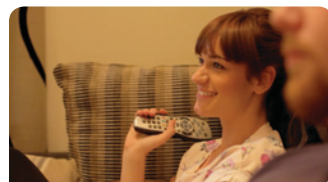
**37%**  
OF TV ADVERTISING'S EFFECT IS ACHIEVED ON OTHER PRODUCTS IN A BRAND PORTFOLIO WHICH ARE NOT BEING DIRECTLY ADVERTISED

# Screen Life: TV advertising everywhere

How are people watching TV now and what does this mean to advertisers? Thinkbox's third Screen Life study broke out the EyeCams and other innovative research techniques to find out.

Screen Life is our ongoing series of research studies looking at emerging TV technologies and behaviours. The latest – 'Screen Life: TV advertising everywhere' – was carried out by Craft Strategy. It brought together video ethnography, in and out of the home using both fixed cameras

and EyeCams worn by participants; mobile viewing diaries; and respondent participation workshops. This was supported by a nationally representative online survey of 2,023 people in the UK. This all came together to reveal the following...



Images: Screen Life 3, commissioned by Thinkbox from Craft

## VIEWING OCCASIONS SHOW THE VITAL ROLE TV PLAYS IN UNIFYING HOUSEHOLDS



**Partnership:** when you and your partner specifically watch the TV that you both enjoy together.



**Personal:** that moment you cherish when it's just you and the TV you have chosen to watch.



**Clan:** when family/friends come together around specific TV that everyone wants to watch.



**Sacrifice:** those times when you put-up with a loved one's TV choices, perhaps because you want to spend time with them.



**Session:** you might have a hangover, maybe it's raining, or you've set aside the afternoon to catch up on a load of TV viewing.



**Multi-task:** you are dipping in and out of what's on TV, but you're mainly busy doing something else like washing dishes, surfing the internet or chatting.



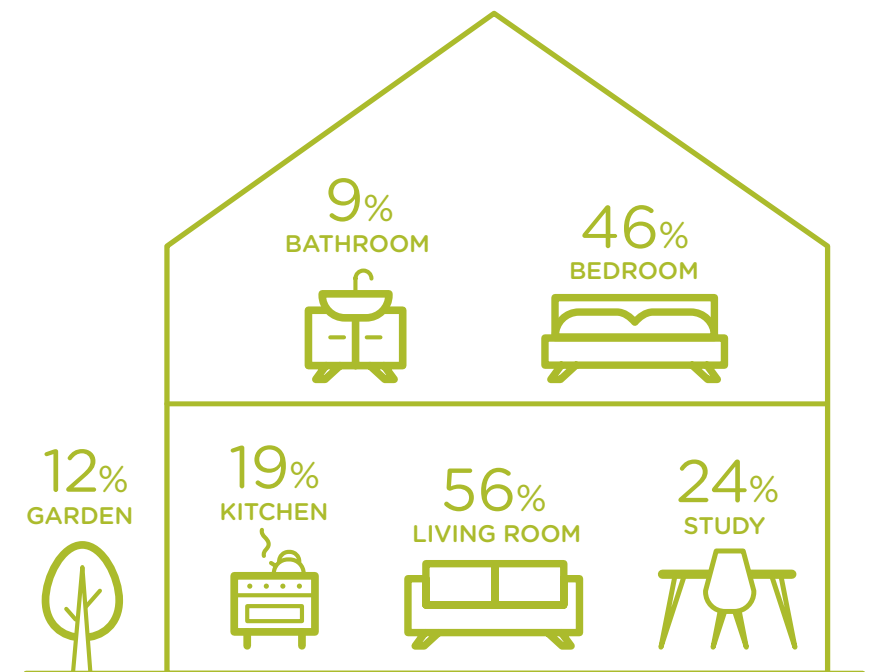
**Feet-up:** maybe you've had a tough day, or you're knackered – whatever the reason, you want to sit, watch TV and relax for a bit, alone or with others.

## TV PLAYS A PROFOUND ROLE IN OUR HOMES

98.4% of TV viewing in the UK takes place on a TV set, with 86% on a TV set in the living room, according to BARB. The study found that two-thirds of the UK (63%) thinks TV is central to making the living room a special place in the home.

## NEW SCREENS HAVE HELPED TV COLONISE THE HOME

Although the living room is the centre of people's viewing, TV is everywhere. The study looked at where around the home people watch TV on mobile screens such as tablets, smartphones and laptops, from the bedroom to the bathroom to the garden (see right).



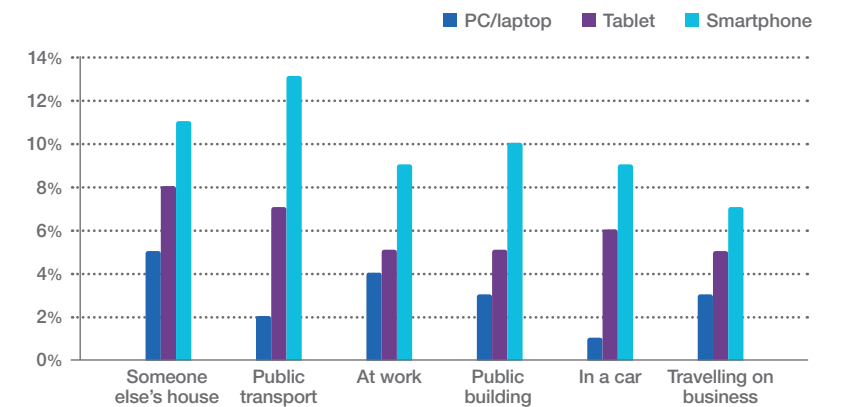
Percentages of people who have watched TV on screens other than the TV set in and around the home.

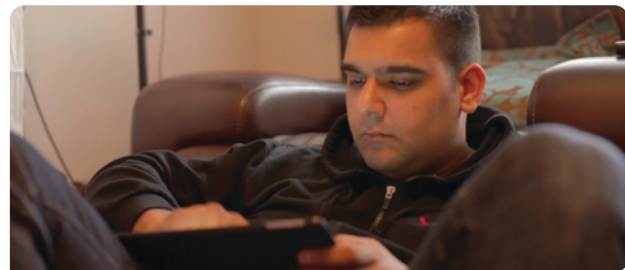
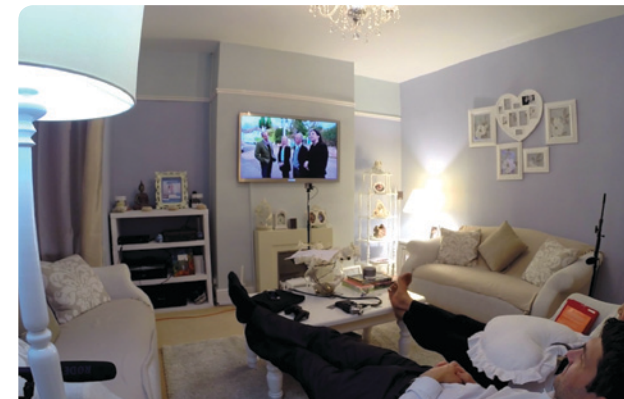
## TV IS NOW EVERYWHERE

As well as all corners of the home, TV now comes with us wherever we go. There's no excuse to miss your favourite show no matter where you are (see right).

## New screens have liberated TV beyond the home

Usage of device to watch TV OOH – location. Source: Craft, Screen Life 3, Nat Rep Study, August 2014





Images: Screen Life 3, commissioned by Thinkbox from Craft

**AD BREAK MULTI-SCREENING DIFFERS BY GENRE**

Ad break multi-screening is most likely to occur around comedy shows (82% picked up another device), entertainment (81%), soaps (77%) and documentaries (76%).

**MULTI-SCREENING DURING AD BREAKS IS COMMON**

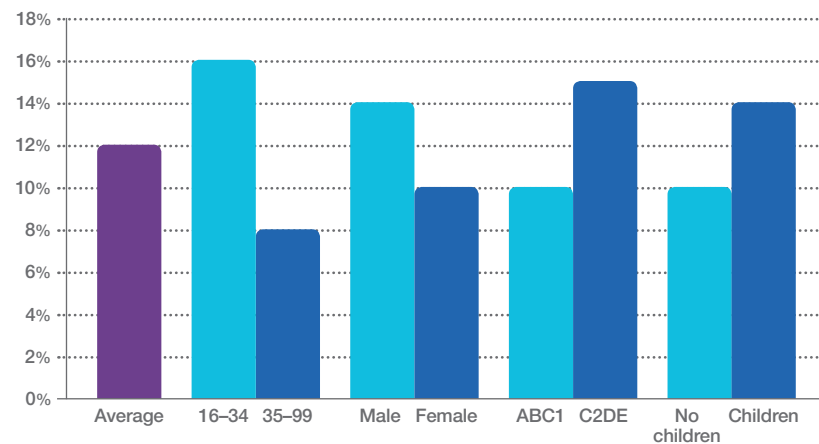
During peaktime viewing, 74% of the study's mobile diary sample claimed to have picked up another device during TV ad breaks. And there was very little difference between age groups, social demographics or gender.

**MULTI-SCREENING NOT CONFINED TO LIVE VIEWING**

79% of the sample claimed to have multi-screened during ads around on-demand TV content at some point and 72% claimed to have done so during the ads featured around recorded TV content.

**TV ads get people talking – younger viewers especially**

% who talked about a television advert during an ad break in the last 15 minutes/demographics. Source: Craft, Screen Life 3, Mobile Field Test (7pm–11pm), August 2014



**12%**  
OF RESPONDENTS  
TALKED ABOUT TV  
ADS PER 15 MINUTES  
OF VIEWING

**MULTI-SCREENING DOES NOT AFFECT AD RECALL**

People who multi-screened during TV ad breaks were able to explicitly recall the same number of TV ads as the average viewer. Multi-screener could recall two ads from the previous 15 minutes of viewing (1.9 was the average).

**WATCHING FOR LONGER INCREASES AD RECALL**

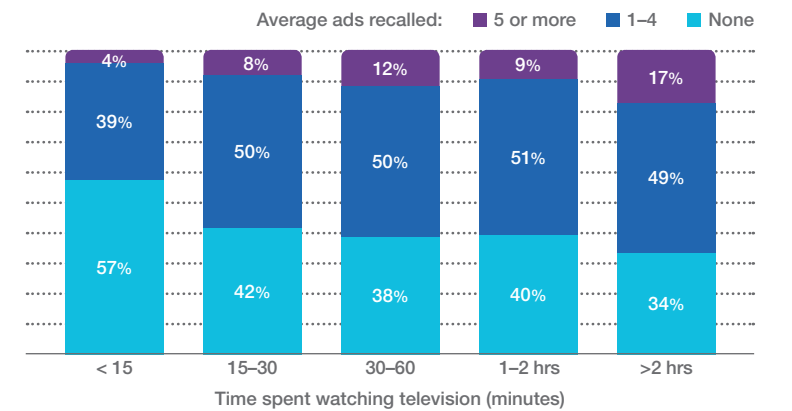
The longer people in the sample watched TV, the more likely they were to explicitly recall a TV ad from the last 15 minutes (see right).

**AUDIO IN ADS IS KEY FOR GRABBING ATTENTION**

Audio within TV advertising proved again to be a powerful way of grabbing people's attention. The video ethnography found that audio was responsible for more attention upshifts (where viewers who had looked away from the TV screen were drawn back to watch) than any other factor. Music or other sounds during ads were responsible for 44% of the attention uplifts identified.

**The longer people watch TV, the better their ad recall**

Source: Craft, Screen Life 3, Mobile Field Test (7pm–11pm), August 2014. Living room viewers only.





# Live for the moment: TV nation

As on-demand video services like Netflix and Amazon Prime compete to attract subscriptions and the broadcasters' on-demand services thrive, live TV continues to dominate. Why? What is it about live TV that we find so compelling? In 'TV Nation' Ipsos MediaCT found out...

2014's 'TV Nation' research was the third year that Ipsos MediaCT had tracked recent trends in how the UK watches TV. Based on 1,000 face-to-face interviews in the UK, it explained how TV is changing but also, how the fundamentals remain the same.

### PEOPLE UNDERESTIMATE HOW MUCH LIVE TV THEY WATCH

Asked what proportion of their TV viewing they thought was live, on average people claimed 57% – considerably lower than the actual UK average of 88%.

### GROUP WATCHING AND EVENT TV ON THE RISE

The study also found that live TV viewing as an event or as part of a group is becoming more popular. In 2013, 13% of people watched live because they felt it was more of an event; this has risen to 19% in 2014. Likewise, in 2013 12% claimed to watch live so they can do with other people; this has increased to 17% in 2014.

### TOP REASONS FOR WATCHING TV LIVE IN 2014

88% of TV in the UK is watched live, as it is broadcast (see page 11) and people love live TV for a variety of reasons.

**28%**  
TO WATCH LIVE ACTION AS IT HAPPENS

**23%**  
JUST COME ACROSS PROGRAMMES AND DECIDE TO WATCH THEM

**19%**  
IT FEELS LIKE MORE OF AN EVENT

**17%**  
TO WATCH THINGS I LOOK FORWARD TO AS SOON AS POSSIBLE

**17%**  
SO I CAN WATCH WITH FRIENDS OR FAMILY

Source: TV Nation: 2014 Ipsos MediaCT/Thinkbox – all adults who watch TV. % any agree.

### WHY WE WATCH TV ON OTHER SCREENS

People are relishing watching TV in new ways, on-demand and on new devices, usually as an additional activity not as a substitute. 1.6% of total TV viewing in the UK is non-TV set viewing (see page 9) and TV Nation uncovered the main reasons for watching on other screens. It is a testament to the attraction of live TV that the main reason to watch TV on other screens is to catch up with a missed show.

### Top reasons for watching TV on another device in 2014

Source: TV Nation: 2014 Ipsos Media CT/Thinkbox – all who watch TV on a TV set and at least one other device. % any agree.

**41%** CATCHING UP WITH MISSED PROGRAMMES

**31%** TO WATCH WHAT I WANT EVEN IF OTHERS IN ROOM WATCHING SOMETHING ELSE

**25%** WATCH IN ROOMS WHERE THERE'S NO TV SET

**23%** WATCH SHOWS I DON'T HAVE ACCESS TO ON MY TV SET

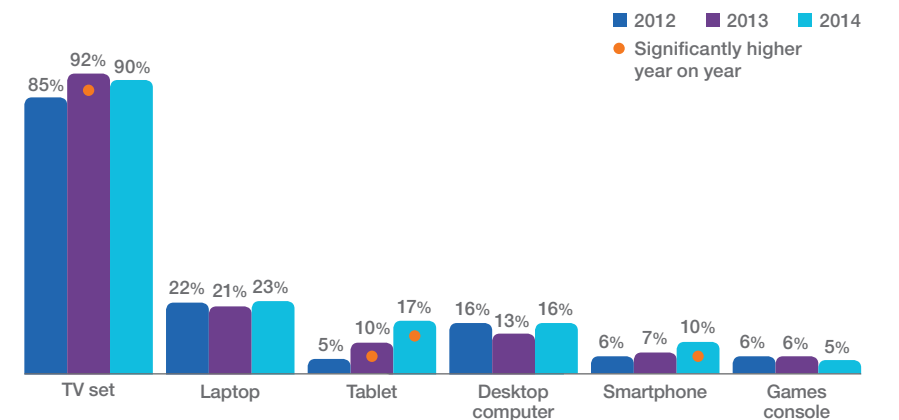
**21%** FOR ENTERTAINMENT WHEN TRAVELLING

### TABLETS SET TO OVERTAKE LAPTOPS AS FAVOURITE SECOND SCREEN

In 'TV Nation' 2012, only 5% of the UK claimed to watch on tablets and 22% on laptops. In 2014, tablet viewing has shot up, with 17% claiming they watch on tablets and 23% on laptops. This suggests tablets may soon overtake laptops as the preferred second screen for TV viewing.

### Tablets may soon overtake laptops as most common second screen

Source: TV Nation: 2012–2014 Ipsos MediaCT/Thinkbox – all adults 15+. Question: In which, if any, of the following ways do you ever watch TV programmes?

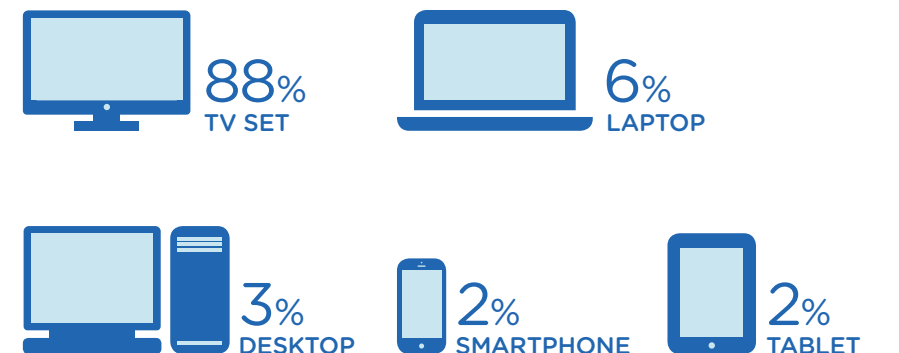


### TV SETS CONTINUE TO DOMINATE

55% of the UK claimed only ever to watch TV on a TV set, despite the prevalence of new screens such as tablets. This figure has been very stable in recent years and is just 1% less than in 2012. The higher quality of the TV set experience helps to explain this.

### The TV set provides an unrivalled viewing experience

Source: TV Nation: 2014 Ipsos MediaCT/Thinkbox – all who watch TV on more than one device. Question: And which of these do you think gives you the best viewing experience, for watching your favourite TV programmes?



# Televisionaries



# Starters for 10

Thinkbox is 10 this year and that is a suitably arbitrary excuse to ask some of the best minds in the ad business their thoughts on the last 10 years in TV, a period that has seen amazing content, record ad viewing, increased ad effectiveness, the birth of on-demand TV, the rise of multi-screening and bucketloads of other TV innovations.



## JEN SMITH

Head of Planning, Maxus

### What is the one thing you have learned about TV in the last decade?

The one thing I have learnt is how so much has changed, and yet so much has stayed the same.

In 2005 I spent Friday night glued to Big Brother (admittedly this was possibly the year it started to get really weird), and in 2015 Gogglebox is my TV of choice. It seems consistently that truth is stranger and more entertaining than fiction.

In terms of advertising it appears real life stands up as strong as fantasy when delivered in beautiful execution. In 2005 we were mesmerised by Sony Bravia bouncing balls down the San Francisco landscape, all the way through to Sainsbury's in 2013 who had us transfixed by how the nation celebrates Christmas in different ways – and desperate to create our own Christmas spreadsheet so our timing was absolutely perfect too.

And then there is technology. In 2006 Sky+ launched. Imagine... being able to pause the TV, fast-forward and also save all your favourite shows in advance. Now, with more TV viewed via non-PSB channels, pausing, skimming and on-demand consumption of your TV favourite is par for the course.

### What do you hope for from TV advertising in the next 10 years?

It is in TV advertising that creativity has always been in full force. Media, and its ability to be creative, has possibly taken a backward step, but with the rise of brilliant media and communications planning integrated into the TV brief I would hope to see more great integrated work like Honda's live TV ad, the Territorial Army live from Afghanistan, Mercedes' You Drive and The Lego ad break.

### Favourite TV ad of the last decade and why?

Being a total softie, one of my favourite advertisers over the last 10 years has been John Lewis and for me the greatest of their tear-jerking, making me question why I can't get EVERYTHING at John Lewis – including plumbers and bricklayers – ads was from the beginning with 'Always a Woman'.



## CRAIG INGLIS

Marketing Director, John Lewis

### What one thing have you learned about TV in the last decade?

When harnessed in an authentic way, TV can quite simply supercharge a brand's momentum. Great TV advertising generates an intensity of engagement with the viewer that is second to none, which creates a platform for immersion across all other marketing channels.

### What do you hope for from TV advertising in the next 10 years?

I hope that the channels will create content that is so brilliantly original and compelling, it will ensure that big audiences remain highly engaged and

that TV remains relevant for many decades to come – on whatever device people choose to watch it.

### Favourite TV ad of the last decade and why?

To be consistent, it's got to be Stella Artois' 'Ice Skating Priests' (I believe it just makes it in to the last decade?!). For its originality, its beauty, the quality of the performances and the enduring humour.



## VICKI MAGUIRE

Deputy Executive Creative Director, Grey London

### What is the one thing you have learned about TV in the last decade?

That TV just won't die. Remember reading that thanks to Nu-media/social/mobile/digital that the box in the corner would become redundant, people would become their own channels, films would become readily available on CD (bless!), people would edit out ads, we'd all be out of a job? Er, hello? We're still here with more channels at our disposal than ever before but we still watch Corrie on our phones on the way home from work.

### What do you hope for from TV advertising in the next 10 years?

I hope we hold on to our balls. I hope we have the chops to stand up and stand out.

I hope we don't pass off piss-poor ideas as 'content'.

I hope Wes Anderson directs ads.

### Favourite TV ad of the last decade and why?

'Meet The Superhumans'. No whiff of charity. No black and white shots. No condescending voice-over. No pity. No sympathy. Just a balls out, in-your-face education in the human spirit. Sticking two fingers to the Games that had gone before. "You think running on two legs deserves a medal. Try it on blades". Fuck, I wish I'd done that.

01 Sony Bravia Fallon

02 John Lewis adam&eveDDB

03 Stella Artois Lowe London

04 Coronation Street ITV

05 Meet the Superhumans Channel 4

06 Skoda Fallon

07 Heineken TBWA

08 The Guardian BBH



### TIM PEARSON

Executive Director, Head of Retail and Agency Development at Manning Gottlieb OMD

#### What is the one thing you have learned about TV in the last decade?

I entered the media agency world in 1999 as a junior TV buyer and I can remember my boss at the time telling me that there was a new box about to launch called TiVo that would result in the death of TV advertising within a few years. Not the most cheerful start to my career but thankfully he was wrong. I subsequently learned that new technology wasn't the thing to end TV; it was the catalyst for a new and exciting era that is still in its infancy. Our current ability to connect and interact with viewers is way beyond anything we could have imagined back then. The innovation that TV has seen in the last ten years has been immense and it will not slow down; it will grow exponentially making the next ten years exciting and completely unpredictable.

#### What do you hope for from TV advertising in the next 10 years?

I hope that advertisers will be able to adapt quickly enough to take advantage of the new innovations that will undoubtedly enter the market. Technology moves faster than most marketing departments, which means that slow moving or habitual behaviour will result in missed opportunities to engage with viewers who have an increasing appetite for new ideas. I also hope that our industry makes it easier for advertisers to sign up to the latest innovations that TV has to offer. Lower entry costs (media and creative) and more effective collaboration between agencies, media owners and technology providers will lead to more effective and more exciting TV advertising.

#### Favourite ad of the last decade and why?

I have two. The first is 'The Baking of Fabia' from Skoda because in 60 seconds it completely changed my view of the brand. And the second is John Lewis' 'Always a Woman' because it was one of the most emotional 90 seconds of film I have seen and it was at the start of a new and exciting journey for the brand.



### NIGEL WALLEY

Managing Director, Decipher

#### What is the one thing you have learned about TV in the last decade?

My major outtake from the last decade is, to paraphrase Mark Twain, that reports of the death of broadcast have been exaggerated. This is not to suggest that there hasn't been a revolution in viewing patterns but the world seems to be settling onto a 'broadcast plus' model that is still dominated by the TV companies.

#### What do you hope for from TV advertising in the next 10 years?

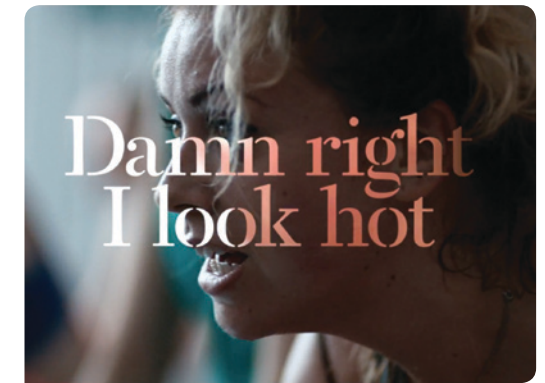
I am looking for a continued shift to quality in TV advertising in the next 10 years. Our recent research continues to show that TV viewers like TV advertising when it is well targeted and entertaining. The advent of ad-avoiding technologies can be thwarted by making ads that people want to watch.

#### Favourite TV ad of the last decade and why

My favourite ad of the last decade is still the Heineken shoe/beer cupboard ad. It was spot on for reinforcing the brand qualities we have grown to love, while being a great bit of content in its own right. This meant that it drove hundreds of thousands of views on YouTube after the broadcast spots showing that viewers will seek out great ads.



Match.com Mother



Sport England FCB Inferno



### RACHEL BARNES

Editor, Marketing

#### What is the one thing you have learned about TV in the last decade?

With investment in high-quality, original formats, TV can easily match the theatrical power of the cinema. In the past decade, Broadchurch, Sherlock, The Wire, House of Cards (I could go on) have proven that the small screen is where we see the most creative, engrossing, entertaining and addictive storylines.

In 2005, an audience of almost 15 million tuned in to see Dirty Den meet his end and 13 million to see Ken and Deirdre tie the knot (the same week that 7 million watched Prince Charles marry Camilla). Fast-forward to today and it is still the good old British soaps and mini-series that dominate the big TV moments of the year.

The fact that the biggest shows can still, on occasion, command a 10 million plus audience in today's ever-demanding, fragmented media landscape is evidence of just how important – and a part of our lives – TV continues to be. I believe we have entered a new era of quality programming, but the face-off between VOD eat-all-you-can streaming and linear TV can be misleading. What we are seeing is incredible shows made for the small screen. The best advertising we see comes from those brands who know how to tell a story with equal power and conviction, whether creatively constrained by their 30-second spot or a 30-minute YouTube film.

#### What do you hope for from TV advertising in the next 10 years?

I hope that humour and theatre will continue to dominate the UK TV ad scene, with that filmic quality we've seen in recent years raising the bar for all brands. As tech disrupts our lives and inventions we didn't even know we wanted pour forth, in 10 years' time the TV experience will be incredible. A sensual assault from 4D TV is likely not far off, but how about drones strategically lingering in airspace ready to deliver the hottest items mere moments after you see the TV ad and swipe the hologram in front of you to make the purchase?

But the big creative idea will remain paramount. Tomorrow's drone deliveries could be today's contrived on-screen hashtags – just a crude method to try to blur real life with the virtual world.

#### Favourite ad of the last decade and why?

Match.com's singing musical youths, the talking horse in the Weetabix Steeplechase ad and the Guardian's 'Three Little Pigs' are all among my favourite ads of the past decade. And, while 'This Girl Can' is new this year, I think it will go down as an all-time favourite. The message is so strong – and to think it's from a government body, Sport England, makes it all the more impressive. Superb campaign.

As predictable as it may be, however, John Lewis' 'The Long Wait' is my winner. Creatively it is beautiful and the casting of the little boy is so perfect for the narrative and the surprise at the end. You can watch this ad again and again and it stands the test of time as a great piece of entertainment. Simply put, in my opinion it is the very best example of storytelling. A very close second is 'Always a Woman'. Predictable, but never timeworn.

# Showtime

TV is only as good as the shows on screen. They are what advertisers want to rub shoulders with. Let's hear from the programme chiefs on their favourite TV from 2014, and what to look forward to in 2015.



**EMMA TENNANT**  
Controller of UKTV

**Home favourite:**

Monty Python Live (Mostly). Tickets to see the last-ever Monty Python shows were like gold dust and the final night was a national event. We were thrilled to have Gold as the TV home for this amazing show and to be able to add to the experience with the wrap-around show hosted by Dara O Briain. It was an incredible night that really resonated with the channel's audience. The main issue was just how were we going to play the Penis Song out at 7:45 in the evening!

**Away favourite:**

True Detective on Sky Atlantic. I was hooked from the beginning; it completely merged the film and television world with Matthew McConaughey and Woody Harrelson at front and centre. Every episode was a cinematic experience and kept you on the edge of your seat throughout. The story arcs were detailed but the way it flashed from past to present day made it easy to follow and enjoy.

**Looking forward to:**

Hoff the Record on Dave. David Hasselhoff plays a heightened version of himself in this half-improvised, half-scripted comedy show. David, as The Hoff, will take us on a surreal journey based on his already surreal life which promises to be one of the highlights of the Dave schedule. Coming to the UK to resurrect his career we follow him as he re-launches The Hoff, but where does David end and the Hoff begin?!





### SEAN GORMAN

Director, Kids Channels, UK at Turner Broadcasting

#### Home favourite:

I love Clarence on Cartoon Network! It's a really funny show that follows the life of a very optimistic kid, Clarence, and his two best friends. We see the world through his eyes. The show celebrates the pitfalls and triumphs of childhood with Clarence always finding the fun in everything – it's a great life lesson and inspiring for kids both big and small!

#### Away favourite:

I loved Gogglebox. It's like watching a live Twitter stream, a simple idea but very funny and compulsive viewing. I'm not at all surprised it's caught on so much. It feels so much part of our culture now and I love how TV can do that.

#### Looking forward to:

I'm really looking forward to the premiere of a new comedy, We Bare Bears. It's an original production from the CN studios. From what I've seen so far, it's going to be hilarious! It's got all the usual qualities of CN comedy – and has a distinct feel that both adults and kids will find funny.



### STUART MURPHY

Director, Entertainment Channels at Sky

#### Home favourite

If you haven't seen The Legacy on Sky Arts yet, give it a go. From the creators of Borgen and The Killing, it tells the story of a family torn apart by a disputed inheritance. It's beautiful, haunting, intense and absolutely gripping – the type of programme that makes me very proud of working at Sky and very relieved I don't work in family inheritance.

#### Away favourite:

The Graham Norton Show. I think he is fantastic. It doesn't matter how A-list the guests are, it's just like watching a group of mates having a drink, a laugh and a muck about. I love his nervous energy – he seems to put his all into every single show. Love it.

#### Looking forward to:

Apocalypse Slough. 2015 will be Sky Entertainment's biggest year ever so it's hard to just pick one show, but Apocalypse Slough should be a real highlight. It's a comedy drama about the end of the world starring Rob Lowe, Jenna Fischer from The US Office, Mathew Baynton, Megan Mullally from Will and Grace, and Pauline Quirke. A huge show for us.



### JAY HUNT

Chief Creative Officer at Channel 4

#### Home favourite:

I absolutely love 24 Hours in Police Custody. It takes a world we think we know and shows us a side of modern policing that feels fresh and insightful.

#### Away favourite:

Modern Family on Sky 1 remains one of the best comedies of the past 10 years.

#### Looking forward to:

I can't wait to see how the women cope on The Island. This year will play as a real social experiment where two contrasting islands provide a glimpse into how the sexes cope differently with being marooned with nothing.



### PETER FINCHAM

Director of Television, ITV

#### Home favourite:

Cilla. A stunning central performance from Sheridan Smith, a hit with audiences and critics alike, and already beginning to pick up awards, Cilla was my programming highlight of 2014.

#### Away favourite:

Gogglebox. It wasn't new in 2014, but it's an original format that deserves all the praise it receives. A fantastic idea, and in our line of work, an interesting watch!

#### Looking forward to:

Jekyll and Hyde. A step in an exciting direction for us. Jekyll and Hyde is a new action adventure drama from Charlie Higson, inspired by the Robert Louis Stevenson novel and its brilliant characters, brought to life for a new generation.

01 Clarence Cartoon Network

02 The Legacy Sky Arts

03 The Island Channel 4

04 Cilla ITV

# Awarding TV excellence



# IPA Effectiveness Awards

Advertising can be judged in many ways – popularity, creative awards, tweets, views and shares – but if it didn't actually work then you have to question the point. That's why these awards are special.

Thinkbox has proudly sponsored these prestigious gongs every year since we were set up. Supporting them was one of the first things we did.

The IPA Effectiveness Awards recognise advertising campaigns that actually work; they celebrate what we are supposed to do: change behaviour, build and maintain strong brands and strong businesses. These are the awards to win because they get to the heart of what advertising is all about.

So enormous congratulations to the winners. We have been huge fans of adam&eveDDB and Foster's Grand Prix-scooping 'Good Call' campaign since the beginning. It ticks every box: a strong brand idea led by powerful, emotional TV, which is then brilliantly integrated across platforms. It has reinforced the learning from Les Binet and Peter Field's work on the IPA databank that the most accurate predictor of effectiveness is likeability. So we shouldn't be surprised it is supremely effective. And Grey London should also take a particularly enormous bow for winning the Effectiveness Agency of the Year award. A brilliant effort.

## SPECIAL PRIZES

**Grand Prix:**  
Foster's Heineken UK  
adam&eveDDB

**Effectiveness Network of the Year:**  
OMD

**Effectiveness Company of the Year:**  
Grey London

**Best Dedication to Effectiveness:**  
Sainsbury's

**Best Multi-Market:**  
Only Bestseller  
Grey London and UncleGrey (Denmark)

**Best Small Budget:**  
Pancreatic Cancer Action  
Team Darwin

**Best International:**  
National Depression Initiative (NDI)  
Health Promotion Agency  
FCB New Zealand

**The Channon Prize for Best New Learning:**  
London 2012 (Travel Demand Management)  
Olympic Delivery Authority/  
Transport for London  
M&C Saatchi



Foster's



Aldi



Pancreatic Cancer Action



National Depression Initiative



Mercedes



First Direct



British Heart Foundation



Specsavers



Only



Transport for London



Dacia

## GOLD WINNERS

**British Heart Foundation**  
Grey London

**Dacia**  
Renault UK  
Publicis London and  
Manning Gottlieb OMD

**Foster's**  
Heineken UK  
adam&eveDDB

**London 2012**  
Olympic Delivery Authority/  
Transport for London  
M&C Saatchi

**Mercedes**  
Mercedes-Benz  
AMV BBDO

**National Depression Initiative (NDI)**  
Health Promotion Agency  
FCB New Zealand

**Only**  
Bestseller  
Grey London and UncleGrey (Denmark)

**Pancreatic Cancer Action**  
Team Darwin

**Specsavers**  
Specsavers Optical Group  
Manning Gottlieb OMD

## SILVER WINNERS

**Aldi**  
McCann Manchester

**Be Clear on Cancer**  
Public Health England  
M&C Saatchi

**Cuprinol**  
AkzoNobel  
18 Feet & Rising

**easyJet**  
VCCP and OMD

**Everest**  
MBA and MediaCom

**Fire Safety**  
Department for Communities  
and Local Government  
RKCR/Y&R

**Group of Humanitarian Attention to the Demobilised**  
Colombian Ministry of Defense  
Lowe and Partners (Colombia)

**ITV**  
ITV

**Mobile Internet**  
Deutsche Telekom  
DDB Tribal Group (Germany)

**Premier Inn**  
Whitbread  
RKCR/Y&R

**Ready Baked Jackets**  
McCain  
PHD Media

**Sainsbury's**  
AMV BBDO, Blue Rubicon,  
PHD Media and Sainsbury's

**The Salvation Army**  
Mike Colling & Co and  
WPN Chameleon

## BRONZE WINNERS

**Aviva**  
AMV BBDO

**EDF Energy**  
AMV BBDO and  
Havas Media

**Expedia**  
Ogilvy & Mather London  
and Expedia

**Fairy**  
Procter & Gamble  
Grey London

**first direct**  
JWT

**Garnier UltraLift**  
L'Oréal  
Publicis London

**Kärcher UK**  
Kärcher UK

**Lux**  
Unilever  
JWT Tokyo and Unilever (Japan)

**Make Health Last**  
Heart and Stroke Foundation  
of Canada  
Lowe Roche (Canada)

**Mattessons/Fridge Raiders**  
Kerry Foods  
Saatchi & Saatchi

**McDonald's**  
McDonald's Denmark  
OMD Denmark and DDB  
Copenhagen (Denmark)

**MILO**  
Nestlé Malaysia  
Ogilvy & Mather (Malaysia)

**Sensodyne Pronamel**  
GlaxoSmithKline  
Grey London



# Innovation and ingenuity:

## the TV Planning Awards 2014

The Thinkbox TV Planning Awards celebrate effective TV planning in all its guises and this year we were overwhelmed with inventive entries which showcased TV in all its glory. Campaigns big and small, classic and groundbreaking, we saw some of the very best TV thinking.

Innovation and ingenuity stood out in the 2014 awards, demonstrating how much more flexible TV has become and how powerful it can be, even on a limited budget. Campaigns were bold and brave and used the latest TV formats and diverse applications. Once again the awards reminded us how creative planning brilliance can be.

The star of 2014 was undoubtedly Manning Gottlieb OMD which won five awards including the coveted Grand Prix for Sony PlayStation. The campaign's premise was based on gamifying ads for the launch of the new PS4, teaming up with Channel 4 to build the launch around a key weekend with teaser blipverts, idents and on-air competitions. And it came with impressive results; the PS4 was the fastest selling console of all time.

### THE WINNERS

**Grand Prix winner, Best use of TV innovation:**  
**Manning Gottlieb OMD**  
 Sony PlayStation  
 'Putting the play back into PlayStation'

**Best use of TV in an integrated campaign:**  
**Manning Gottlieb OMD**  
 John Lewis  
 'How The Bear & Hare made Christmas'

**Best ongoing use of TV:**  
**Havas Media**  
 Just Eat  
 'From minnow to mainstream'

**Best newcomer to TV:**  
**Manning Gottlieb OMD**  
 John Lewis Insurance  
 'Finding their home on TV'

**Best use of sponsorship or content:**  
**the7stars**  
 Ministry of Sound  
 'The only way is Marbs'

**Bravest use of TV**  
**Havas Media**  
 East Coast Trains  
 'The Sky's the limit for East Coast Trains'

**Best low-budget use of TV**  
**Manning Gottlieb OMD**  
 Prostate Cancer UK  
 'Father's Day'

**Highly commended**  
**Starcom MediaVest Group**  
 Tetley  
 'Pause for a cuppa?'



Just Eat



Sony PlayStation



John Lewis Insurance



Ministry of Sound



Sony PlayStation



John Lewis

### THE JUDGES

**Alistair MacCallum**  
 Managing director, M2M

**Hamish Pringle**  
 Strategic advisor, 23red

**Leila Travis**  
 Head of planning, Thinkbox

**Rik Moore**  
 Head of communications strategy, Havas Media

**Andy Sloan**  
 Chief executive, All Response Media

**Jason Dormieux**  
 Joint chief executive, MEC

**Leo Rayman**  
 Head of planning, Grey London

**Tess Alps**  
 Chair, Thinkbox; Chair of judges

**Arif Durrani**  
 Head of media, Campaign; editor, Media Week

**Jenny Biggam**  
 Founder, the7stars

**Nick Radmore**  
 Head of social marketing and brand, British Heart Foundation

“There was no shortage of creativity and innovation this year. TV was used in so many different ways with increasing flexibility and true collaboration from the broadcasters. Cleverness and invention delivered great results.”

**David Grainger**  
 Head of strategy, Initiative

**Julia Jordan**  
 Ex Executive director, business and operations, UKTV

**Pippa Glucklich**  
 Co-chief executive, Starcom MediaVest Group

**Tess Alps**  
 Thinkbox Chair and Chair of judges

**Elizabeth Fagan**  
 Marketing director for health and beauty, international and brands, Alliance Boots

**Kelly Williams**  
 Commercial director, ITV

**Richard Morris**  
 Managing director, Vizeum UK

# Creative wizardry: The Thinkboxes

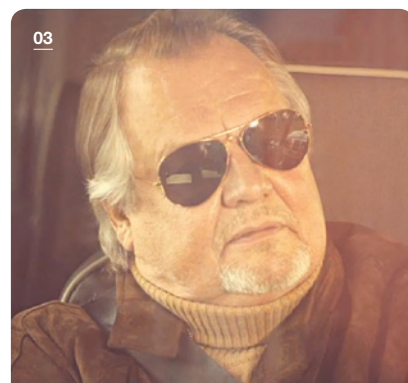
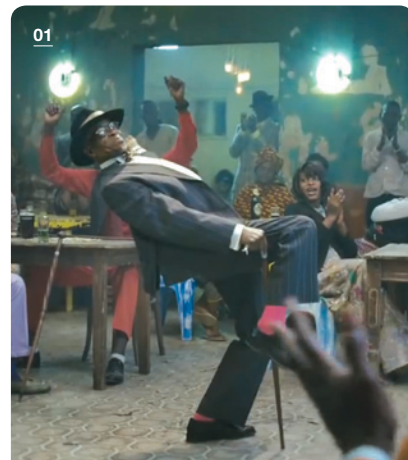
Brilliant TV ads stir the emotions, generate fame and have an unrivalled impact on profit. So it's only natural that Thinkbox celebrates the UK's world-beating TV advertising, and the people behind it, with the Thinkboxes, our bi-monthly awards scheme.

"Creativity is intelligence having fun," said Einstein and our 2014 Thinkboxes winners exemplify intelligence and fun in abundance.

Now in its seventh year, The Thinkboxes are run in association with Haymarket Brand Media. The winners are selected by a vote from the 250-strong Thinkbox Creative Academy, made up of senior individuals from the advertising industry, all of whom have previously won awards for their TV advertising work. The shortlist is announced in Campaign, and the winners and runners-up are celebrated in Marketing magazine.

Craig Inglis, Marketing Director of John Lewis, and Nick Gill, Executive Creative Director of BBH, are the joint Academy Presidents and this joint presidency symbolises the partnership between advertiser and creative teams required to bring about the best in creativity.

2014 was a heroic year for creative ambition. Our winning spots all entertained and charmed, gave us something fresh, warmed our hearts and at times, achieved the unthinkable.



## AND THE GONGS WENT TO...

**January/February** Guinness  
Ad Sapeurs  
Client Stephen O'Kelly  
Agency Abbott Mead Vickers BBDO  
Director Nicholai Fuglsig

**March/April** Lurpak  
Ad Adventure Awaits  
Client Laurence Fischer  
Agency Wieden & Kennedy  
Director Dougal Wilson

**Shortlist**  
Cadbury Dairy Milk Office  
Land Rover Grey and pleasant  
Thomson Simon the Ogre  
Three The ride

**May/June** National Express  
Ad Silver Lady  
Client Susanna Holdsworth  
Agency Isobel  
Director Olly Williams

**Shortlist**  
Anchor Cheddar  
The glorious nothing days  
Cravendale Barry the Biscuit Boy  
Vodafone The call  
Waitrose When you own something,  
you care a little more

**July/August** IKEA  
Ad Beds  
Client Peter Wright  
Agency Mother  
Director Juan Cabral

**Shortlist**  
McDonald's Hunter gatherer  
Pets at Home My pet moments  
Royal London Ye olde pensions  
Wilko Keeping up with the Rogers

**September/October** Volkswagen  
Ad Compromises  
Client Sally Mawson  
Agency Adam&Eve/DDB  
Director James Rouse

**Shortlist**  
Avis Unlock the world  
Irn-Bru Irn in our blood  
Three Feel at home  
Transport for London  
Share the road

**November/December** Sainsbury's  
Ad Christmas is for sharing  
Client Mark Given  
Agency Abbott Mead Vickers BBDO  
Director Ringan Ledwidge

**Shortlist**  
John Lewis Partnership  
Monty the penguin  
Boots Homecoming  
McVitie's Victoria Christmas Choir  
Co-operative Food Marzipan

01 Guinness Abbott Mead Vickers BBDO

02 Lurpak Wieden & Kennedy

03 National Express Isobel

04 IKEA Mother

05 Volkswagen Adam&Eve/DDB

06 Sainsbury's Abbott Mead Vickers BBDO

# How can we help?



# Help! I need some (trade) body

The Thinkbox team only gets out of bed if it can help you. No other motivation works. Except maybe to write unbearably weak puns on song lyrics. But, other than that, we stay bed-bound. So please rouse us by helping us to help you...

## THE EMAIL OF THE SPECIES

Sorry. We promise no more puns. But our emails are a special species. We will keep you up to date with all things TV, from the latest news, case studies, blogs to upcoming events and research you need to know about. We promise not to bombard you. You can register to receive these perfectly timed dollops of TV joy via our website.

## IT'S TRAINING MEN (AND WOMEN)

We lied. One more pun. Training is one of Thinkbox's top priorities. We offer training workshops throughout the year and all are free to people working at a UK advertiser, a media or advertising agency, or for one of Thinkbox's associates, shareholders, or their partner companies. To attend a workshop, simply fill out the registration form in the Events and Training section of our website. And, if you want bespoke training, just ask.

01



02



## HELP(DESK)!

Those who can't find what they're looking for on **Thinkbox.tv** can contact our Planning Helpdesk. Either email [info@thinkbox.tv](mailto:info@thinkbox.tv) or call on 020 7630 2320 and we will do our best to answer any question you have and provide you with the latest information.

## PRESENTATION'S ALL YOU NEED

As Roy Castle spins in his grave, we'd like to tell you that in 2014 we did nearly 250 presentations to agencies and advertisers around the UK and abroad. Our team of TV nuts is here to help you get to grips with how TV works, why it works and how it is changing.

As much as is feasible within a small team, we always aim to present face to face and give you a chance to ask questions. Give us a brief and we'll do our best to deliver – all for free. To arrange a presentation contact Catherine: [catherine.bunting@thinkbox.tv](mailto:catherine.bunting@thinkbox.tv)

## HEY, BIG EVENTERS!

Couldn't resist – and it is harder than you'd think to pun the word 'event'. Anyway, we host an enviable programme of inspirational events focused on the things that matter to advertisers and featuring intimidatingly wise industry gurus. And you don't need to be a big spender as they are all free. You can either come along in person or lean back and watch the live web stream from your desk if you'd prefer. Visit the Events and Training section on the website to see what's coming up in 2015 and to view past events on film.

## SHINY 'APPY PEOPLE

The Thinkbox app offers you all the essential facts, figures and thinking in TV advertising, and is designed for anyone involved in or interested in TV advertising – from advertisers, media planners and buyers, to creative agencies, auditors and journalists. It includes BARB's latest TV viewing data, inspiring case studies, TV ad galleries, and the best research into how and why TV advertising is so effective. Download for free via the Apple App store.

## LOVE AT FIRST WEBSITE

**Thinkbox.tv** brings together every aspect of the world of TV advertising and is home to a wide variety of brilliant content, designed to inspire and inform agencies and advertisers. Visit our website for more details, obvvs.

## UNDER PRESS-URE

Moving swiftly on, journalists: this glossy thing in your hands is designed to be a handy reference guide full of TV facts. But if what you're looking for isn't here, it's sure to be on our website. Better yet, get in touch with our Head of Communications, Simon Tunstill ([simon.tunstill@thinkbox.tv](mailto:simon.tunstill@thinkbox.tv)), and he'll furnish you with whatever you need to help ensure your articles are accurate as well as insightful.

01 **Scandal** Sky Living02 **Vera** ITV03 **Royal Marines Commando School** Channel 4

If you'd like to discuss any of our work further, then please do contact us.

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