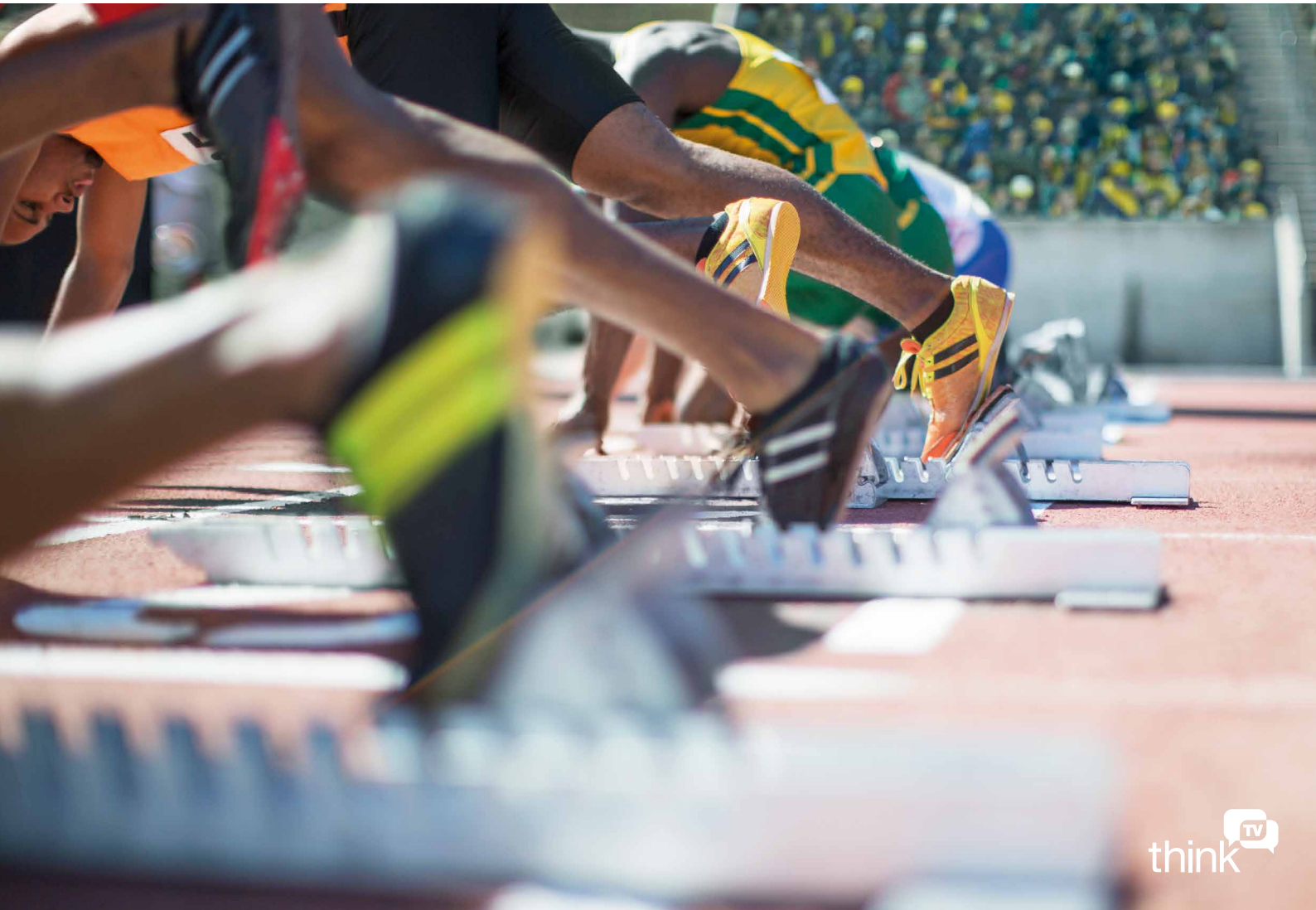


76 million reasons **to love TV**





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Why read this?

It's a fair question. You're undoubtedly busy and there is that unopened article on how AI is going to revolutionise advertising and steal all our jobs eyeing you from your inbox.

We think you'll find this digest to be useful because it tackles some of the most pressing topics in advertising today: things like attention, viewability, measurability, transparency and most importantly, effectiveness.

This booklet puts context around the hyperbole, busts some media myths, and contains a few facts that may surprise you (did you know that an average broadcast TV campaign of 400 TARPs gets 76 million views?).

While it's true that our world revolves around TV, we only ever present thorough, evidence-based facts. We understand that you need to make informed and effective decisions, and that is only possible when you have all the information at your fingertips.

Since we launched in July 2016, ThinkTV has commissioned a feast of independent research by globally-renowned marketing academics and media experts. The findings are rich with data and insights. This booklet aims to provide bite-sized and delicious morsels of all the key findings – plus some tasty bonus bits.

We hope you find it a useful digest – or at least a nice starter before you tuck into that scary report on AI.

- 01 Wentworth, Showcase.
- 02 The Bachelorette Australia, Network Ten.
- 03 My Kitchen Rules, Seven Network.
- 04 Australian Ninja Warrior, Nine.
- 05 Wanted, Seven Network.



If you read one bit, read this

We know you don't always have time to languish in the details.
So if you've only got a few minutes, read this.



TV IS AN EXPERIENCE – AVAILABLE ANYWHERE, ANYTIME

Watching your favourite show on a big screen from the comfy couch in the living room is still the preferred way to watch video, because it is heaven isn't it? But sometimes you're not at home, or someone else has bagged the Big Tellie, and if that happens there are more ways to watch TV than ever before. (See page 10 for more).

WE'VE ALL HEARD OF SVOD BUT DON'T FORGET BVOD

Aussie's viewing of Broadcaster Video-On-Demand (BVOD) content on other screens is growing like crazy. It's up 42% year on year with more than 325 million minutes viewed each week. That's the equivalent to the combined time that 29,000 Hipsters in Kombi vans spent looking for parking at the beach last summer. (See page 28 for more).

TV REACHES MORE PEOPLE FASTER THAN ANY OTHER MEDIUM

There was a time when broadcast TV and cinema were pretty much the only video advertising for brands. Now there are lots of new kids on the block, including new forms of TV. Yet TV remains the fastest way to reach a mass audience and make your brand famous in a way that cannot be matched by any other media. (See page 12 to find out more).

01 Home And Away, Seven Network.
02 True Story With Hamish And Andy, Nine.
03 MasterChef Australia, Network Ten.



TV MAKES MARKETERS MORE MONEY

Ask any CFO and they will tell you that return on investment (ROI) is all they want to know about advertising effectiveness. So we asked Ebiquity to get you some crib notes. Their Payback study showed that on average, \$1 invested in TV pays back \$4.13 in sales revenue across key advertisers from four of the economy's biggest sectors – Finance, FMCG, Automotive and E-Commerce. (See page 14 to find out more).

NOT ALL VIDEO AD VIEWS ARE EQUAL

If your ad can't be seen then it won't have an impact, right? That may seem like a blinding flash of the obvious, but we commissioned a team of PhDs to do the research anyway. The results showed that for advertising, attention equals sales. TV commands more attention, which means a stronger sales result from TV advertising than all other video platforms. Why? Because TV ads are shown in all their glory and they take up 100% of the screen. It's a no brainer. (See page 16, 18 and 20 to find out more).

TV IS RELIABLE

Media channels are under the microscope – and rightly so. Tough questions are being asked about everything from brand safety to audience measurement. TV audiences have been independently measured and audited for 17 years and commercial broadcasters in Australia lean in to any and all scrutiny. TV is transparent and has strong brand safety controls: all programming and advertising content must meet broadcast guidelines set by the ACMA which are enforceable by law. (See page 30 for more).

TV is everywhere, premium quality, liked and trusted

All TV is video, but not all video is TV. TV is unique for its content, its huge appeal and its ability to bring people together.

TV BRINGS PEOPLE TOGETHER

Can you imagine what newspapers or social media would look like if TV didn’t exist? It’s easy to forget that almost 9 out of 10 people watch broadcast TV every week. TV enriches our lives with humour, cultural reference points and shared joys and sorrows. Some say the water cooler has been replaced by social media, but regardless of venue, imagine the colour our conversations would lack without TV? Not happy, Jan.

TV HAS UNBEATABLE REACH VELOCITY

There are lots of alternatives to TV and yet Australians watch 2 hours and 41 mins of live and playback TV on in-home TV sets each day, which is equivalent to 81 hours per month. A single spot in a tent-pole programme can reach more than a million people in under a minute, and an average TV campaign of 400 TARPs can reach almost 60% of the population in a fortnight. Nothing compares to the reach velocity of broadcast TV.

TV CONTENT PROVIDES THE HIGHEST QUALITY ENVIRONMENT FOR ADVERTISING

Our reputations are made and lost by the company we keep, and it’s no different

for brands. It is important to distinguish the different contexts within which video is consumed and what advertising it rubs shoulders with.

TV across all platforms swims in the trusted, high quality end of the video pool but there are wild variations in the context for other types of video advertising. Unlike some of the biggest online-only platforms – where user-generated content dominates – TV is not about videos of cats on skates, it’s premium quality content that is professionally produced and curated.

AUSTRALIANS LIKE AND TRUST TV ADVERTISING

The 2017 AdNation Study found that TV advertising is the most liked form of advertising: it’s also the most trusted, the most memorable, and the one most likely to generate an emotional response. TV is the most likely place to find advertising that draws attention to a brand, product or service you haven’t heard of.

AUSTRALIANS LOVE LOCAL CONTENT

TV provides fantastic context for advertising because of its high quality content and

the relationship viewers have with it. Commercial broadcasters invested \$2.4 billion creating local content in 2016, and all of the top 25 rated programmes in 2017 were produced locally. It is the creative fruits of that investment that produce a quality environment for advertising, and it’s the advertising revenue that enables the investment in content. It’s like a lovely virtuous circle.

EMOTIONAL CONNECTION EQUALS SALES IMPACT

TV advertisers have learned a thing or two about high quality content – it’s why they spend so much time crafting ads that resonate with their audiences.

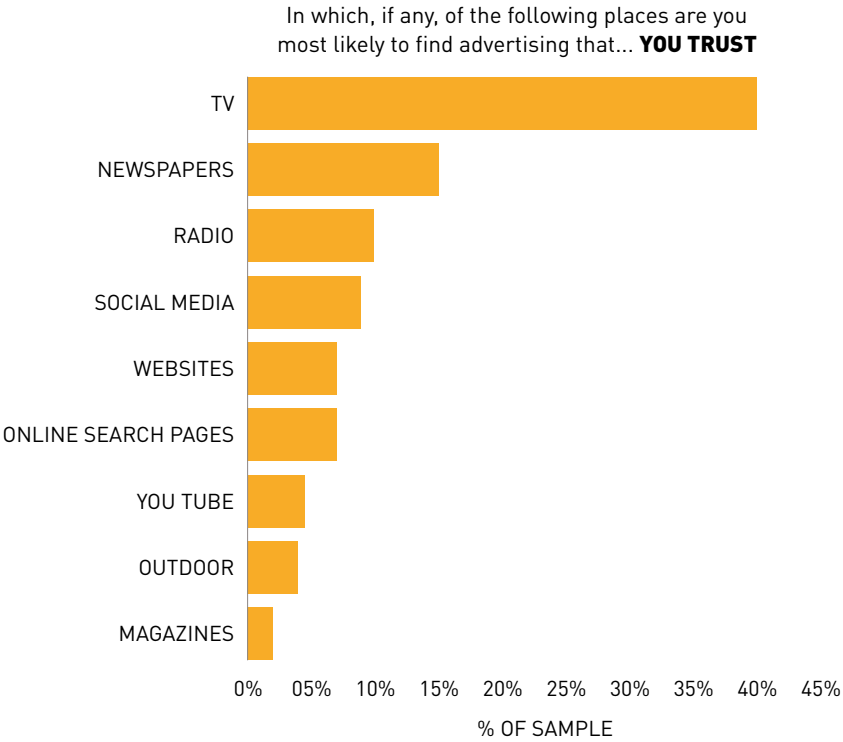
Research from The Benchmark Series shows that they are right on the money. TV ads that generate a strong emotional reaction – irrespective of whether or not the reaction is positive or negative – attract 16% more attention than ads which elicit weak reactions. And attention translates into sales: products with ads that generate a strong emotional response are 30% more likely to be chosen by consumers than ads that generate a weak response.

AVERAGE MONTHLY TIME SPENT IN FRONT OF THE TV SCREEN

TOTAL USE OF THE TV SET - Monthly average	0200-2600 (hh:mm)
Total TV Screen Use	113:03:00
Total Broadcast TV	81:25:00
Watching Live TV	72:21:00
Watching Playback to 7 days	7:25
Watching Playback 8-28 days	1:39
Other TV Screen Use	31:38:00

Source: OzTAM, Australian Video Viewing Report Quarter 2, 2017

AUSTRALIANS TRUST TV ADVERTISING THE MOST



Source: ThinkTV AdNation Study, April 2017

TV REACH CURVE

A 400 TARP campaign will generate around 60% reach



Source: TVmap

TARPs

How do we TV?

TV is having babies. There’s live-streaming, Broadcaster Video-On-Demand (BVOD) and other online, on-demand viewing – yet live broadcast TV is the mother of the TV experience as we know it and the beating heart of home entertainment. The future is a blend of both broadcast and its babies.

89% OF BROADCAST TV IN AUSTRALIA IS WATCHED LIVE

Nothing can alter the fact that humans like humanity. Despite the new choices technology brings, we generally prefer watching TV as it is broadcast, sitting on our sofas, in the company of others. Live TV fulfils a basic human need to belong. Social media and the increasing potential for spoilers only adds greater urgency to our love for live TV. But if you are out and about, don’t panic, you can live stream TV on virtually any device.

LIFE’S RHYTHM, NOT ALGORITHMS

There’s a reason that tech companies like Facebook and Twitter are turning towards live video. On-demand – awesome and convenient though it is – can’t replace live TV because it can’t replicate what TV does for people; it can’t understand our viewing needs. The broadcasters are expert at understanding what programmes we want to watch even if we don’t necessarily know ourselves.

AUSTRALIANS LOVE LIVE SPORT ON TV

Aussies have a bit of a thing for live sport; what other country stops and

gathers around the nearest screen for a horse-race at 3pm on the first Tuesday of November? In 2017 almost half of the top 25 rated programmes were live sporting events. Live sport can generate an almost five-fold increase on the monthly average of 2.5 million devices used to watch BVOD or live-streaming.

AUSTRALIANS ALL EXPERIENCE TV IN THEIR OWN WAY

When live viewing isn’t possible there’s always playback. Many of us save our favourite shows on PVRs and watch them on playback when it suits us. This is particularly true for drama, where overnight audiences increase 22% when playback is added.

AUSSIIES LOVE THE FLEXIBILITY OF BVOD

BVOD services such as Foxtel Now, 9Now, 7plus and tenplay mean no Australian need ever miss their favourite show because of ill-timed soccer practice. BVOD offers more than catchup content, with archived shows and BVOD originals too, all available anytime, on any device. Small wonder BVOD viewing soared 42% in 2017,

to an average of more than 325 million minutes a week.

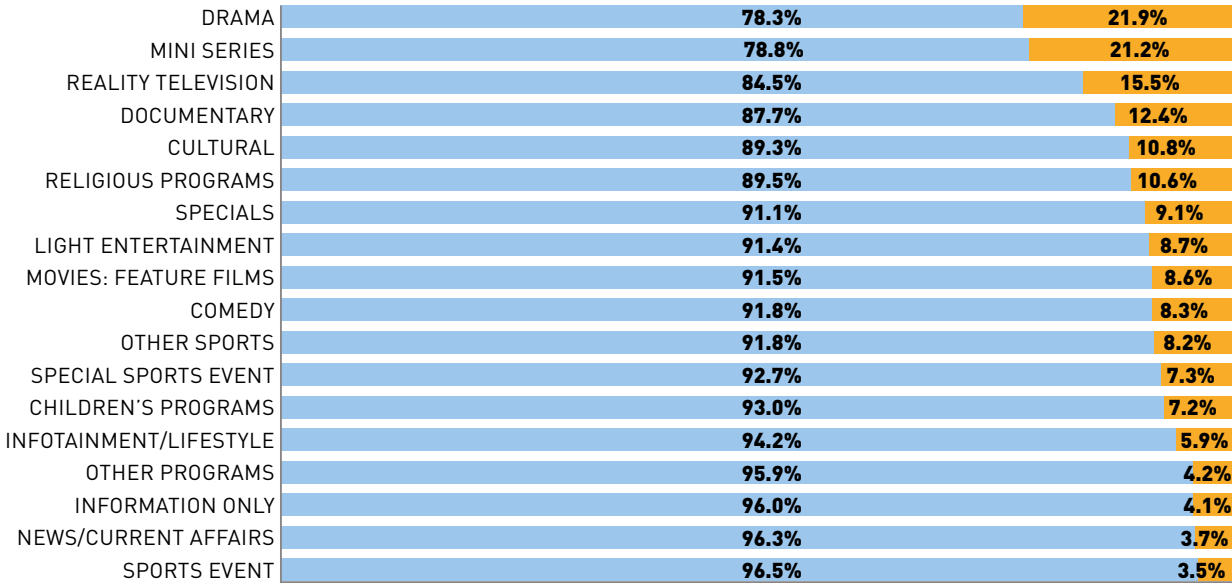
ON-DEMAND IS A BOX OF CHOCOLATES

The myriad of on-demand options means today’s TV has almost limitless menus of programmes to consume. But everyone has a different diet, depending on their age, gender, and appetite for genres. Younger audiences are the most enthusiastic fans of watching on-demand, older viewers still watch a lot more live. But in general, live TV is still our daily food and on-demand is a box of chocolates. Together they fulfil our every TV need.

THE JOY OF MULTI-SCREENING

There is an urban myth that because everyone is multi-screening, no one sees the ads on TV anymore. While two-thirds of Aussies admit to having multi-screened while watching TV, 90% of them say they can still engage with TV while multi-screening. And that makes sense, watching TV with a connected device in hand has simply made our relationship with TV deeper and more immediate, enabling us to chat about what we’re watching or go online and buy that product we saw advertised, all in real time.

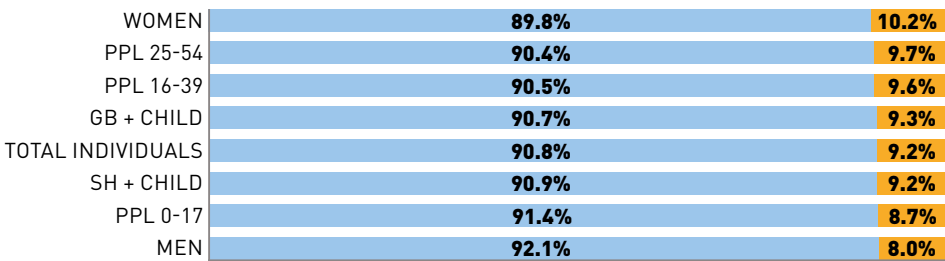
LIVE AND PLAYBACK VIEWING BY GENRE



Source: OzTAM Metro, Total TV. 0200-2600. Jan 2017 to Dec 2017 – FTA Networks only

Live Playback

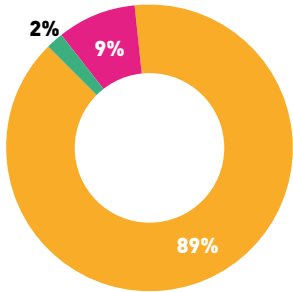
LIVE AND PLAYBACK VIEWING BY DEMOGRAPHIC



Source: OzTAM Metro, Total TV. 0200-2600. Jan 2017 to Dec 2017 – FTA Networks only

Live Playback

TOTAL BROADCAST TV VIEWING ON TV SETS, PER PERSON, PER MONTH



Watching Live TV
Watching Playback to 7
Watching Playback 8-28

Source: OzTAM, Australian Video Viewing Report Quarter 2, 2017

Aim wide

Targeting is an important element of marketing, but every serious piece of research about advertising effectiveness shows that broad reach is essential to make brands grow.

TV REACHES FAR, WIDE, NEAR AND NARROW

With connected TV sets, BVOD and addressable advertising, different TV commercials can be sent to different households and individuals. Advertisers have always bought against specific TV audiences, but targeting, with the advent of new technology, has gone to the next level, making TV accessible to niche, emerging and never-been-on-TV-before brands.

MASS MARKETING, MASSIVE RESULTS

But never lose sight of the mass power and reach of TV advertising. TV can be laser-targeted and do amazing things in the short term as well as being a gift that keeps on giving over time. TV has unique value that comes from mass reach over the long term. It creates the kind of fame and word of mouth that builds the biggest brands. In ‘Advertising Effectiveness: the Long and Short of it’, Les Binet and Peter Field – “The Godfathers of Effectiveness” – showed that reaching a mass audience is the most effective strategy: targeting the whole market achieves double the profit effects achieved by focusing on existing customers.

STAY SHARP AND AIM WIDE

Acclaimed marketing scientist Professor Byron Sharp has shown that brands need

to target the whole market if they want to grow, and that mass media is critical for marketing success. Sharp argues that focusing on loyal customers is *not* the best way to grow a brand. We can’t detail it all here (as much as we’d like to). But if you want to know more, Sharpe’s *How Brands Grow* is widely considered to be the modern marketer’s handbook.

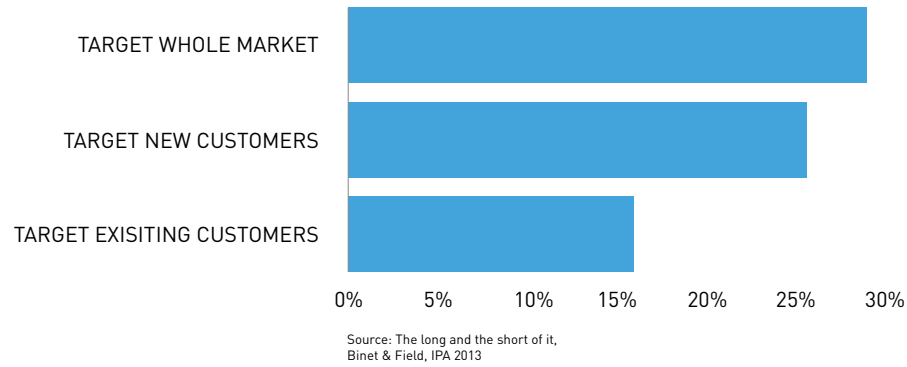
‘WASTAGE’ IS A MISNOMER

‘Wastage’ sounds bad when actually it should be highly valued by advertisers. An ad may be relevant to someone who is outside

your target market but is a light or potential buyer. Where would automotive brands be if they only reached people who could buy their cars right now and not those who aspire to in the future? TV’s reach and efficiency helps make TV advertising even more effective by reaching future potential customers, generating fame and word of mouth and setting up brands for future growth.

- 01 Today, Nine.
- 02 A Place To Call Home, Showcase.
- 03 The Living Room, Network Ten.

PROFIT EFFECT



The true value of TV

When it comes to buying media, there’s a big difference between focusing on cost and effectiveness. Too often the conversation about TV advertising begins and ends with the cost of buying airtime. TV’s true value lies in what the investment pays back versus other media.

MANY HAPPY RETURNS

The best measure of marketing success, which can be overlooked, is the return on investment a brand actually makes from its media spend. We know this can be tricky and time-consuming to work out, so ThinkTV commissioned Ebiquity, an independent marketing and media consultancy, to do the maths. Ebiquity asked 21 advertisers with a collective spend of over \$500 million in 2016 to provide three years’ worth of raw sales and campaign data to be analysed using econometric modelling. We called the research Payback Australia. Here’s what it showed.

THE RAW TRUTH

TV is the most efficient media channel when indexed across advertisers drawn from four of the economy’s biggest sectors: Fast Moving Consumer Goods (FMCG), Automotive, Finance, and E-Commerce. TV is almost twice as efficient as the next

most efficient channel, Search, which indexes to 57% of TV’s efficiency. TV returns average sales of \$1.70 for every dollar invested within the FMCG category, \$8.90 for Automotive, \$0.60 for E-Commerce and \$5.30 for every dollar invested in media within the Finance category.

THE RECKONING

Ebiquity found that TV delivers almost twice the sales uplift from media spend compared to Search and Radio, and circa five times more ROI than Out-of-Home, Online Video and Online Display media. TV also has the longest retention rate – the lingering effect advertising has on consumer purchasing behaviour – of all the media. Because TV advertising keeps working for weeks after the spot airs.

TV TURBOCHARGES OTHER MEDIA

Before we get too cocky, we should acknowledge that the E-Commerce

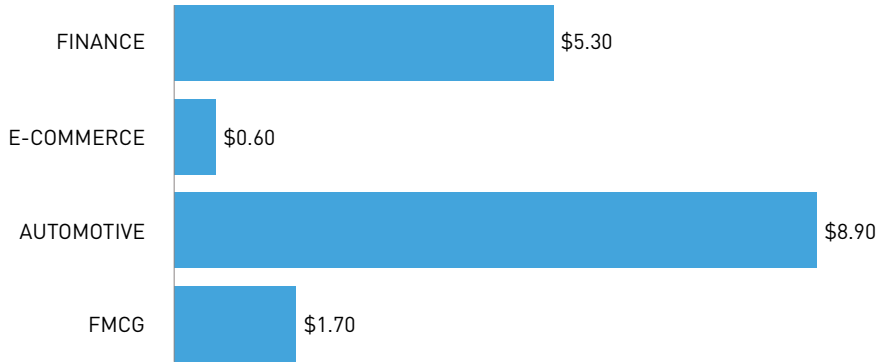
category worked differently. TV was third after Search and Radio when it came to ROI in this category. Perhaps not that surprising given the businesses modelled were online-only.

But before you write off TV in this category, Ebiquity models showed TV played a big role in driving Search traffic for those businesses. “As a major business you cannot live on Search alone and TV is the most effective media to support Search,” was the summary from Richard Basil-Jones, Managing Director of Ebiquity - Asia Pacific.

HOW TO GROW

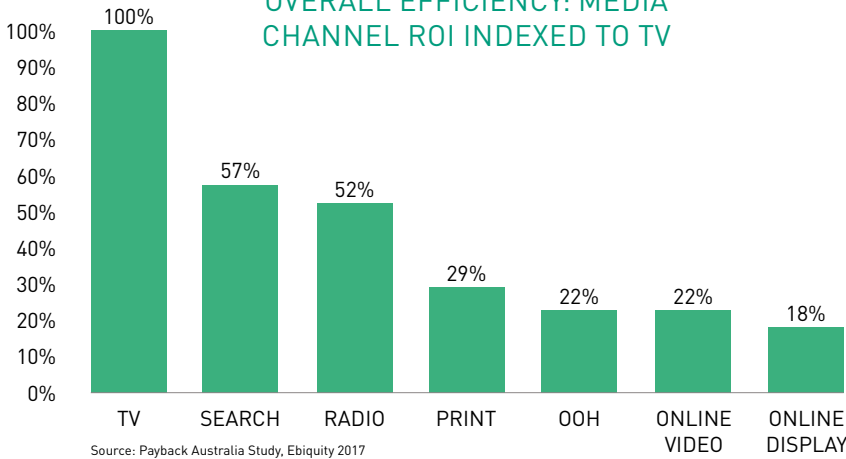
So by all means get the calculator out and seek cost efficient spend on your media but don’t neglect to examine how that spend is actually growing your business. Time and time again, in studies around the globe, TV comes up trumps as the best medium to drive brand growth.

OVERALL RETURN BY CATEGORY - TV ROI



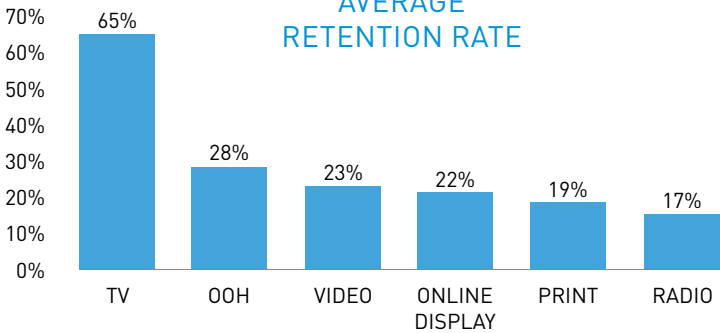
Source: Payback Australia Study, Ebiquity 2017

OVERALL EFFICIENCY: MEDIA CHANNEL ROI INDEXED TO TV



Source: Payback Australia Study, Ebiquity 2017

AVERAGE RETENTION RATE



Source: Payback Australia Study FMCG, Ebiquity 2017

The 3 rules of effective advertising?

Attention. Attention. Attention.

We have seen that platforms such as YouTube and Facebook have attracted more of our time in recent years. That certainly suggests increasing popularity, but does that mean these are always the best place for your ads? To find out, we commissioned Dr Karen Nelson-Field, a Professor of Media Innovation at The University of Adelaide, to undertake The Benchmark Series study.



Benchmark is an independent, large-scale, in-home study that measures how Australians really engage with video advertising across different platforms and devices, enabling comparisons to be drawn between TV, Facebook and YouTube on TV sets, computers, tablets and mobiles.

So let’s cut to the chase: the results showed that TV, on a TV set, commands almost 1.3 times the attention of YouTube watched on a computer and almost three times that of Facebook on a computer. All platforms showed increased attention when

delivered on mobile, with TV (BVOD) still king; commanding 1.2 times the attention of Facebook and 1.4 times that of YouTube.

Which is all fine and good, but what impact does the level of attention have on sales?

Well, once participants had viewed the platforms and their attention had been captured using eye-tracking they visited an online supermarket to choose products they wanted to purchase. The team not only found that participants were more likely to choose the products that they had seen

advertised (so we proved that advertising works – hooray!) but that the more attention paid to the ad for a product the greater the sales impact in the online supermarket.

In the world of marketing, attention is king, and as it becomes increasingly difficult to capture, attention becomes king-ier than ever. Yet capture it we must, as it’s attention that delivers sales.

01 KITKAT TV Advertisement.
02 Scholl TV Advertisement.
03 Finish TV Advertisement.



IN AN AVERAGE AD SECOND, MOBILE DEVICES COMMAND ATTENTION ON ANY PLATFORM

ATTENTION				
	TV SCREEN	PC	MOBILE	TABLET
TV	58	39	63	43
FACEBOOK	-	20	54	-
YOUTUBE	-	45	44	-

SALES IMPACT				
	TV SCREEN	PC	MOBILE	TABLET
TV	144	153	161	174
FACEBOOK	-	118	121	-
YOUTUBE	-	116	137	-

Source: The Benchmark Series, 2017

How to be a prize-winning attention seeker

So we know that advertising’s ability to capture attention is critical if it is to generate a sale. But what can advertisers do to give their video advertisements the best chance of success?



BRANDING SHOULD BE LARGE, OFTEN AND EARLY

It turns out that the size, frequency and timing of your brand’s appearance in an ad correlates to attention and sales impact.

Ads that produce greater sales impact:

- 1. Show the brand at twice the size of poorly-performing ads,
- 2. Show the brand almost twice as often and
- 3. Are 25% more likely to display the brand within the first two seconds.

SO THAT’S THE CREATIVE LESSON BUT WHAT ABOUT MEDIA CHOICE?

Simples. Ask the following:

- How much of the ad can the consumer see on the screen?
- How long is the ad seen by the consumer? [Actual viewing time, no bots, no scroll].
- What proportion of the screen does the ad cover?

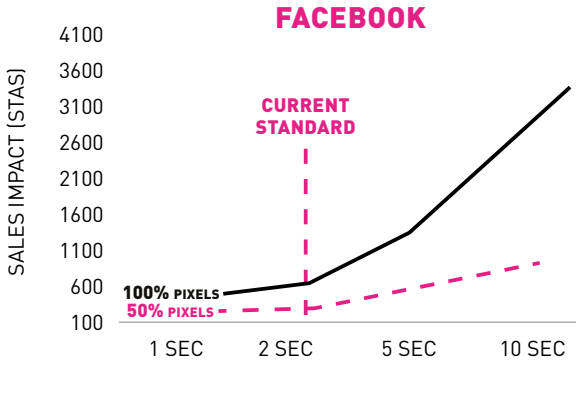
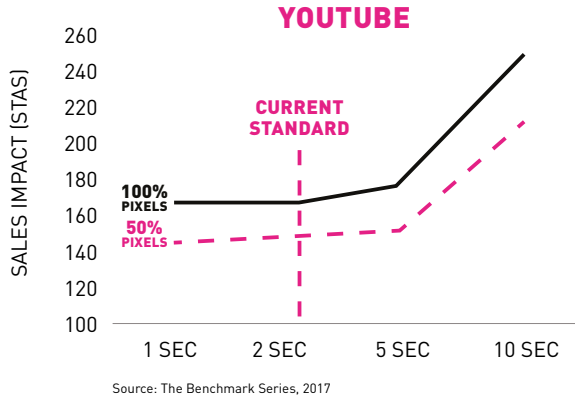
The big lesson from the Benchmark Series? Aim for 100% of your ad playing on 100%

of the screen. Because if you can’t see the ad, it won’t generate a sale – we know, we know, amazing right?

Professor Nelson-Field hit the nail on the head at ReThinkTV 2017: “Coverage is always maxed on TV across almost all devices, and until other platforms take that position, TV is the top of the tree in terms of attention, cut-through and sales.”

01 Kona TV Advertisement.

ADS THAT ARE FULLY RENDERED (100% OF PIXELS) GENERATE TWICE THE SALES IMPACT OF THE CURRENT STANDARD (50% OF PIXELS)



PROPORTION OF INVENTORY DELIVERED AT DEFINED VIEWING LENGTHS AND PIXEL LOADS

		FACEBOOK	YOUTUBE	TV
ONLINE VIDEO STANDARD	50% PIXELS & 2 SECS	56%	78%	100%
10 SEC STANDARD	50% PIXELS & 10 SECS	30%	59%	100%
100% PIXEL STANDARD	100% PIXELS & 10 SECS	21%	48%	100%
10 SEC & 100% STANDARD	100% PIXELS & 10 SECS	4%	30%	100%
TV STANDARD	100% PIXELS & 30 SECS	0%	6%	100%

Source: The Benchmark Series, 2017

Get with the programmes

From sponsorship to contextual advertising, the opportunities for brands to get closer to TV content have never been greater. Whether it's aligning your brand with the perfect programme, integrating your product into the action of a show, or signing TV talent to act as your brand ambassador, the prospects are delicious.



TURBO CHARGE ATTENTION AND SALES THROUGH BRAND INTEGRATION

AdLand has always known that integrating brand messages into appropriate TV content, and sponsoring shows, provides a brand with long-term, sustained equity impacts. And yet so often advertisers overlook integration in the media mix in favour of “spots and dots” because they carry a lower cost per thousand (CPM). The Benchmark Series found that brands enjoyed a sales uplift when they integrated their brands into TV’s fabulous content. It’s like the icing on the cake isn’t it?

Be it sponsorship, advertiser-funded programming, advertorials, interactive content, competitions and promotions, televised branded events, product placement, or licensing, there are many

bright colours on the palette of content partnerships for advertisers.

I GET SO EMOTIONAL, EVERY TIME I WATCH TV

We know that TV is the complete story-telling medium, capturing viewers’ hearts and minds and bringing them back week after week. TV affords brands the time and space to create a beginning, middle and end, build tension and resolution, triumph or loss – and the ads are shown against premium quality content. Combine the power of story-telling with mass reach and you have the perfect context for your brand to build valuable equity and grow.

TV advertisers have learned a thing or two about high quality content too – it’s why they spend so much time crafting ads that

resonate with their audiences. And research from the Benchmark Series shows that they are right on the money. TV ads that generate a strong emotional reaction – irrespective of whether or not the reaction is positive or negative – attract 16% more attention than ads which elicit weak reactions.

When your ad sits within highly engaging content your audience’s emotions will be heightened, creating greater attention. And if we know one thing from Benchmark, we know that attention translates into sales: ads that generate a strong emotional response get a 30% greater sales impact than ads that generate a weak response.

01 A2 Milk Company TV Advertisement.
02 Aldi TV Advertisement.

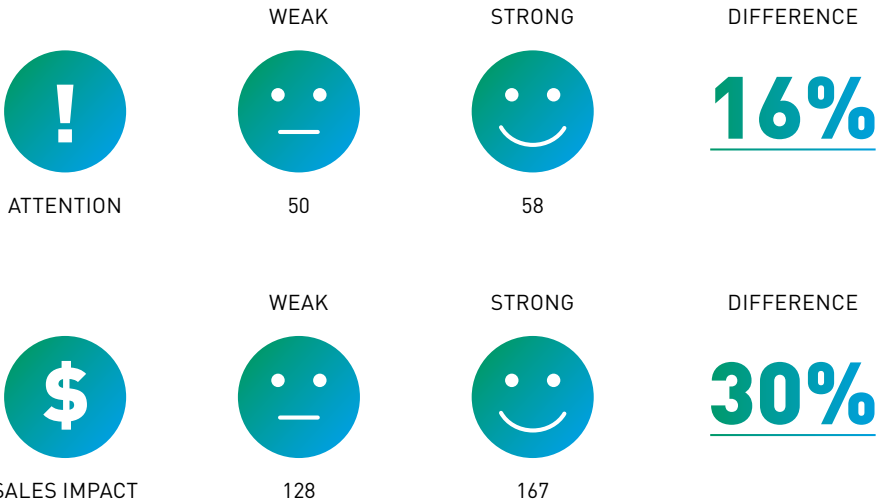
ADS THAT PRODUCED GREATER SALES IMPACT...

	% UPLIFT (GOOD VS POOR)
Showed brand at twice the size (brand prominence)	100%
Showed the brand almost twice as often (brand frequency)	96%
Showed the brand within the first 2 seconds (brand entry timing)	25%

Source: The Benchmark Series, 2017

EMOTIONAL REACTIONS TO ADVERTISING

Ads that generate high emotion response have greater sale impact



Source: The Benchmark Series, 2017

Case study: How a digital property app used TV to drive performance

It was a case of delivering *real* results when Australia’s best property app partnered with Australia’s leading real estate reality format.

Domain has had huge success in partnering with The Block since 2015, and 2017 was no different.

In 2017 Domain was focussed on driving their credibility as an expert in order to increase app downloads and memberships, core business metrics for the brand.

BRINGING REAL ESTATE EXPERTISE TO RENOVATIONS

As with any good TV format, The Block is about great characters; the ones that we love, hate, laugh at and learn from. In 2017, we worked with Domain to bring their own character to our screens, week in, week out; a true expert that would demonstrate that when it comes to Real Estate, Domain knows best.

Throughout the series we integrated Alice Stolz, Domain National Managing Editor, seamlessly into The Block. She featured with Scotty Cam and Shelley Craft as they

checked the progress of each renovation, judging the rooms based on the key selling criterion; did the room cater to the needs of the Elsternwick buyer.

Additional Domain experts were also integrated at relevant moments in the series. ‘Domain Doctors’, Data Scientist, Dr Nicola Powell and Economist, Dr Andrew Wilson armed the Blockheads with insights about the Melbourne property market, specifically Elsternwick, to prepare them for the mammoth task ahead, and attended the open for inspections to help the contestants get the highest reserve for their properties.

OUTSTANDING RESULTS

With The Block reaching 15.75M Australians across the series, Domain was able to promote their expert suburb knowledge to Australians across the country. As a result they saw a +43% increase in new app users and +20,000 new members to Domain while The Block was on air.

“At Domain, we track and measure everything we do and what makes The Block such a strong channel for us is that the activity within the show translated directly to business outcomes.

The show integration delivered spikes in new app users every time The Block was on.”

Melina Cruickshank
Chief Editorial and Marketing Officer, Domain



Case study: Heinz, the one for Footy

Heinz showed footy fans how they're the perfect match on and off the field with key integration pieces into AFL narrated by world-class presenters.

TOMATO SAUCE OR KETCHUP?

Do you know the difference? Over 70% of Aussies did not know if there was a product difference between the two. Ketchup is packed full of tomatoes that make it thick and we all know thicker is tastier. So Heinz needed to clear up any confusion and encourage Aussies to upgrade to Heinz; by showing them that "Thicker is Tastier". Spark Foundry, knowing there's nothing more Australian than Footy; and only one ketchup that can complement footy foods, found Heinz the perfect and most contextually relevant match with integration into AFL broadcast.

UPGRADING LOCAL FOOTY

Heinz surprised local footy clubs by upgrading their ranks with AFL legends and Channel 7 presenters Cameron Ling, Katie Brennan, Nick Riewolt and Brian Taylor making a special appearance for match day to give their advice, support and motivation. This helped grab the attention of fans from the grassroots up. Heinz provided the fuel to these integration pieces as everyone involved came together to enjoy a post-match snack.

RECORD RESULTS

These integration pieces achieved mass reach with Seven's AFL broadcast reaching over 7.5m Australians. Supported by shared sponsor billboards and airtime, before being propelled further afield as they were extended to Seven social and all Heinz digital assets. The campaign kicked some major goals exceeding overall sales expectations for Heinz ketchup by 23% – clearly the audience understood that Heinz Ketchup is better, thicker & tastier.

GRAND FINAL DAY

Seeing what AFL integration could do for ketchup; Heinz took their baked beans into Grand Final day with the ultimate integration piece; helping power Seven's commentary team to get them through a long day. With it being Brian Taylor's first Grand Final match call, we saw him nervously practice for the big event, bringing comedy to the kitchen where Hamish McLachlan struggled to make his morning jaffle with Heinz baked beans and Lingy proving he had it all in hand!

"The "Upgrade to Heinz" campaign was a major milestone for the Heinz brand. The task was clear: achieve impact, reach and resonance. Working closely with 7Sport, we married iconic Seven presenters with an iconic household brand creating content that kicked major goals."

Mughees Abid

Marketing Director Heinz
The Kraft Heinz Company



Case study: Rexona – helping you thrive under pressure

Rexona wanted to re-connect with their male target audience after a four year break from sports advertising and reaffirm its long-time positioning: “It won’t let you down”.



REINVIGORATE THE MALE SPORTING AUDIENCE

After tapping into a core passion point, sport, Rexona needed a reinvigorated message to drive the male sporting audience to purchase.

Brand insights demonstrated Rexona’s association with sport was about elite athlete’s performance. This resulted in ‘pressure’ within sport becoming the centre of the brief. Rexona showed how athletes are able to thrive under pressure, to reach the target audience during LIVE sport.

CROSS-CODE CONTENT

A cross-code talent campaign was created

with ten athletes, including Johnathan Thurston, Patrick Dangerfield and Scott McLaughlin. 18 x 60” content pieces and three x 30” TVC’s were produced, with insights into each athlete and how they perform under pressure.

The content was played during LIVE broadcast, and saw high impact and targeted placements across major FOX SPORTS digital and social channels.

HIGH PRESSURE MOMENTS

FOX SPORTS was able to place Rexona messaging at precise moments when pressure was building in LIVE sport broadcast, (using reactive VIZ pull-

throughs), connecting Rexona with the LIVE audience in real time.

Great reach was delivered for Rexona placing the brand at the heart of the LIVE sporting conversation. This was MCN’s largest ever cross-channel, cross-platform content series that saw 7.59m fans exposed to the Rexona Pressure Series.

THE RESULTS

- Rexona Sport is now the number one selling deodorant in Australia (MAT 26/2/2017)
- Rexona regained baseline sales growth during the campaign (Qtr 9/10/16 - 8/1/17)
- 14m views on FOX SPORTS digital assets.



Case study: Holden and Australian Survivor partner for success

In 2017, Holden returned as a key partner of Australian Survivor, leveraging the power of television to drive awareness and sales for the Holden Trailblazer.

The 12 week partnership extended across multiple platforms, including broadcast, online, social media and dealership events.

FIRST LOOK BILLBOARDS

In the lead up to the series launch, Holden received a number of 'First Look' billboards, where viewers were given a sneak-peek look at the new season, with thanks to Holden.

OUTSTANDING INTEGRATION

The highlight of the Holden partnership was when a brand new Trailblazer was shipped from Australia to Samoa to become the most exciting integrated reward of season 2. The integration was featured on Network Ten's Gogglebox and The Project.

TAILORED COMMERCIAL CONTENT

Network Ten created a series of 30" TVCs for Holden, amplifying key features of the vehicle and featuring series 1 Australian Survivor runner-up, Lee Carseldine.

TENPLAY EXTENSION

Sponsorship included homepage takeovers and display media, as well as integration of the Trailblazer within Australian Survivor's online content series, Jury Villa – one of Network Ten's most successful online

content series – achieving 554,000 views in 2017.

CONSUMER PROMOTION

Australian Survivor viewers had the chance to win the Holden Trailblazer by collecting code words featured in episodes and entering via tenplay.

RESULTS

Following season 2 of Australian Survivor, Network Ten conducted a research study to determine the results of the sponsorship.

Holden was correctly identified as the car brand sponsoring Australian Survivor by 38% of viewers, and 44% of Australian Survivor enthusiasts, those who watched regularly or never missed an episode.

When asked what brands they consider when looking to purchase or recommend a mid-sized SUV, 35% of Australian Survivor enthusiasts selected a Holden Trailblazer.

The research results were supported by Holden's record sales of the Trailblazer and the significant increase in brand engagement overall, including a 636% increase in website traffic and 411% increase in website engagement.

"Australian Survivor was a perfect catalyst to drive awareness of the Holden Trailblazer by utilising partnership IP and talent in a contextually relevant environment. It also allowed us to connect with the audience via a dedicated CRM program which helped drive the partnership ROI and effectiveness."

Nancy Del Monaco
Senior Marketing Manager -
Media, Brand and Partnerships,
GM Holden



What makes BVOD so special?

Broadcaster Video-On-Demand (BVOD) gives us greater choice. It provides a suite of advanced advertising solutions spanning interactivity, personalisation, targeting and programmatic opportunities.



01



02

BVOD IS PROFESSIONALLY-PRODUCED CONTENT

Not all video is equal, different types of video appear along a quality spectrum and knowing what content your ad is placed next to is crucial for both effectiveness and brand safety. Right at the high quality, trusted end of the spectrum are the Broadcaster VOD (BVOD) services. And that is great news for advertisers.

BVOD IS THE MOST BRAND-SAFE FORM OF VOD

Your brand won't be rubbing shoulders with inappropriate content in the world of BVOD; nor will you be accidentally funding activities you wouldn't want your brand to fund. And in BVOD, people are choosing to watch a TV programme, so they are relaxed

and have the time to watch your ads – and indeed expect to see them.

BVOD IS ALMOST ALWAYS PLAYED FULL-SCREEN

All BVOD players default to full-screen on tablets, mobiles, TVs and on over-the-top players such as Apple TV as soon as the play button is pressed – collectively that accounts for over 80% of BVOD viewing. On computer-based browsers, which account for less than 20% of viewing, BVOD players default to a large proportion of the screen and many viewers make one click to trigger the player to play full-screen.

HIGHLY ENGAGED VIEWERS, HIGHLY ADVANCED AD SOLUTIONS

BVOD is an indulgent treat, a box of

chocolates. It has highly engaged viewers catching up on their favourite shows and watching premium box sets and movies.

The different BVOD offerings provide a suite of advanced advertising solutions spanning interactivity, personalisation, audience, genre and interest group targeting, as well as programmatic opportunities. The rise of live streaming and the rapid growth of connected TVs are both factors that are helping to make addressable TV a reality.

- 01 Picnic At Hanging Rock, Showcase.
- 02 Suits, Universal.
- 03 Nine News Melbourne, Nine.
- 04 Shark Tank, Network Ten.
- 05 House Rules, Seven Network.



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Measuring video

Advertisers need independent, objective and accountable data to meaningfully understand viewer behaviour and evaluate media performance. In a world where trust and transparency are increasingly rare, Australian TV has for almost two decades enjoyed a world class audience measurement system. OzTAM – Australia’s official source of TV ratings for the five mainland metro markets and nationally for subscription television – offers gold standard measurement methodology and third-party verification.

THE TV PANEL SAMPLE IS REPRESENTATIVE OF THE POPULATION

OzTAM panel homes are recruited via a continual establishment survey involving tens of thousands of interviews each year. Every residential household in OzTAM’s coverage area has a chance to be chosen for interview. Recruitment is managed to ensure the panel reflects the overall population and the panel’s characteristics are continually monitored against external benchmarks such as Australian Bureau of Statistics. Panel homes are anonymous and household members are left alone as much as possible, so as not to influence their viewing activity.

AUSTRALIA IS THE WORLD’S LARGEST PER CAPITA PEOPLE-METERED MARKET

OzTAM and its regional counterpart, Regional TAM, comprise nearly 8,500 panel homes and together capture the actual viewing of more than 15,000 people daily. In terms of panel size relative to the overall

population, that makes Australia the world’s largest per capita people-metered market.

VIEWING IS ONLY COUNTED WHEN THE TV SOUND IS ON AND PLAYED AT NORMAL SPEED

OzTAM uses sophisticated audio matching technologies (think ‘Shazam’ on steroids) to accurately register viewing by all household members and guests to all broadcast channels in each of OzTAM’s coverage areas. If the sound is off those minutes are not counted in the ratings data as a view.

TV MEASUREMENT IS TRANSPARENT, ACCOUNTABLE AND AUDITED

OzTAM retains an independent technical auditor and broadcast ratings data is independently collected and produced by external research supplier, Nielsen, on OzTAM’s behalf. The ABC, SBS, Media Federation of Australia (MFA), Australian Association of National Advertisers (AANA) and Australian Subscription Television &

Radio Association (ASTRA) have observer status at OzTAM board meetings.

TV MEASUREMENT IS CONSTANTLY IMPROVING

The number of homes in OzTAM’s panel has progressively expanded and in 2016 OzTAM introduced Australia’s first official figures for viewing of internet-delivered TV content in its Video Player Measurement (VPM) Report. VPM is capable of reporting on any online video service, including subscription video-on-demand and free streaming services. Unlike broadcast TV ratings, which rely on audio matching, VPM relies on technical implementation by each video provider. As their implementation progress and data is validated by OzTAM, more online viewing data will be released to the market.

- 01 Love It Or List It, Lifestyle.
- 02 Family Food Fight, Nine.
- 03 Better Homes And Gardens, Seven Network.



TV advertisers can have it all



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THE CONNECTED TV IS THE ENTERTAINMENT HEART OF TODAY'S HOME

In addition to watching TV, Australians use their TV sets to play games, watch BVOD, browse the web, access social media and SVOD services. The rise and rise of connected TVs – about 50% of us will have them by Christmas 2018 – means advertisers have even more ways to reach consumers.

TV GIVES ADVERTISERS THE BEST OF BOTH WORLDS

On page 12, we talked about TV's ability to reach far, wide, near and narrow. While one of TV's strengths is its ability to reach vast numbers of people faster than any other medium, TV is also investing heavily in technology and data that makes it easier to find the audience you want.

BROADCASTERS ARE INVESTING IN THE FUTURE

MCN, Nine, Seven and Ten now provide suites of advanced advertising solutions.

From inventive content partnerships and new creative formats to the new use of TV technology and data-led solutions, advertisers have a host of opportunities available to them.

All of ThinkTV's shareholders have been busy on this one, and there is much more to come, but here's a snapshot of what's happened so far.

- Multi Channel Network (MCN) is developing the data management solution SIA with the world's largest privately held software company, SAS. SIA will ultimately provide advertisers with a single consumer view across linear TV and all digital platforms, enabling advertisers and marketers to intelligently connect a brand's ad to the right consumers, on the right screen.

- Nine has launched 9Galaxy, offering marketers and agencies far greater certainty on their TV campaigns by automating buying and selling of TV

and BVOD, with a 100% audience delivery guarantee.

- Seven has begun the scaled launch of live "Addressable TV" in Australia, allowing advertising partners to dynamically insert targeted video commercials on its live streaming and video-on-demand content.
- Network Ten's data and sales partnership with MCN provides opportunities in advanced audience targeting, automation and trading delivered through Landmark, and the new SIA data management solution.

Much more is planned for technology, data and systems automation across the whole TV landscape in 2018. Stay Tuned.

- 01 The Voice, Nine.
- 02 Slime Cup, Nickelodeon.
- 03 800 Words, Seven Network.
- 04 Studio 10, Network Ten.
- 05 Married At First Sight, Nine.



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Talk to us

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Hopefully you are now brimming with facts, figures and a burning fire in your belly to find out more about how TV can grow your brand and your business. If any of the stats in this booklet have sparked your interest, tickled your fancy or got you wondering, you can call us on 02 8016 9360, email us on contact@thinktv.com.au, or visit our website at thinktv.com.au.

The ThinkTV website is a treasure trove of useful resources and killer charts you can pinch at your leisure for that urgent presentation. And it has much more on the nuts and bolts of the Benchmark Series and Payback Australia studies.

And we're always happy to come along and talk to advertiser and agency teams. After all, ThinkTV is here to help you get the best out of today's TV experience, which includes providing the latest facts about TV's effectiveness and examples of brands that have reaped the rewards of investing in TV. We can present on anything TV related; from attention to viewability, which is almost A to Z isn't it?

ACKNOWLEDGEMENTS

We are indebted to our research partners and friends who provide the industry with a plethora of insights and are dedicated to proving what works in advertising.

We also want to acknowledge Thinkbox for inspiration and a little bit of copying as we have re-purposed some content from their booklet entitled "234 million views".

We also wish to thank our shareholders Multi Channel Network (MCN)/Foxtel, Nine, Seven Network and Network Ten.

01 Sunrise, Seven Network.

02 Blind Date, Network Ten.

03 Gogglebox Australia, Lifestyle and Network Ten.



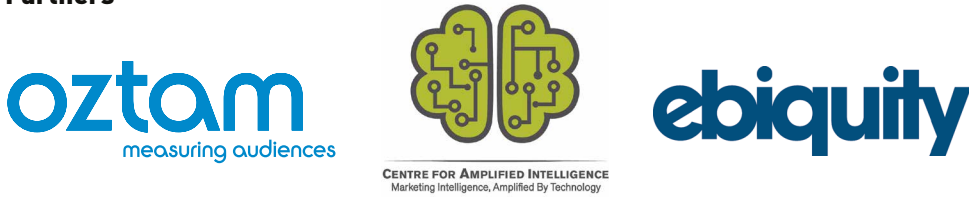
03

With thanks to:

ThinkTV Shareholders



Partners



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