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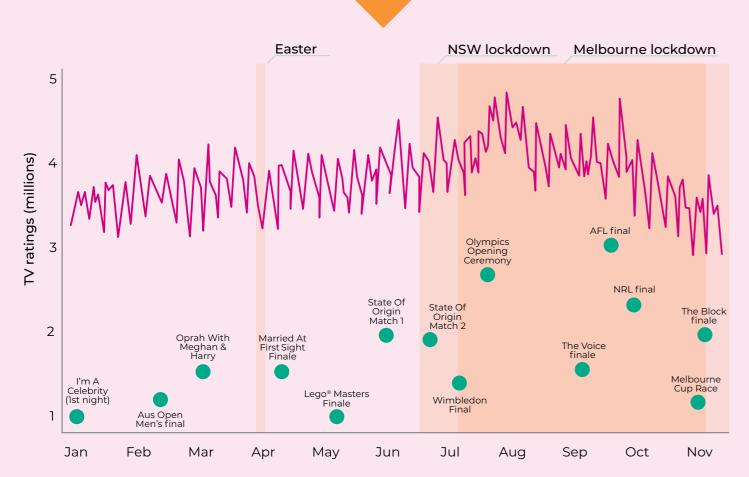




01 The Morning Show, Seven.

02 Find Me a Beach House, Foxtel.





Shows named (green dots) represent the highest rating programs on that day.

The pink line shows total ratings for that day.

TV Ratings by day: Total TV: 6pm to 11pm: 1 January to 13 November 2021

Source: OzTAM, 5 City Metro, TTL TV, 18:00:00 – 22:29:59, Total individuals, Consolidated 28 : 1st Jan-13th Nov 2021.

It's no secret that Australians absolutely love their tellie.

This year, many have evolved the way they watch as Broadcaster Video on Demand (BVOD) established a new baseline for viewership. Record-breaking minutes were viewed on Australia's fastest-growing media platform before, during and after the entertaining and aweinspiring Olympics.

But whether it's the big screen in the living room or the little one in their hand, Aussies' fondness for TV didn't falter in 2021.

As the country dipped in and out of lockdown, TV played more roles than the Hemsworth brothers.

From adviser to educator and entertainer, the great Aussie love affair with TV deepened as the relationship went from strength to strength over the last 365 days.

And for advertisers, it was a year to fall in love with TV all over again.

Any marketer worth their salt knows TV is a powerful medium for driving business objectives. But then along came 2021 – a year of unknowns and uncertainties. And marketers turned to TV in their droves with AdEx figures showing more than 952 new and 1,400 returning advertisers found TV to be the trusted, reliable partner it always had been, in the good times and the bad.

At the heart of all this are our Aussie broadcasters and the Australian stories they tell every day, whether we're talking MAFS, MasterChef Australia, Wentworth or The Voice.

Sharing these homegrown stories is what makes TV so important to Australians. These stories form a significant part of the fabric of our country. And, by giving voice to the stories of Australians, TV opens up a world of possibilities for brands to weave their way into this fabric.

It's fair to say there's been a whole lotta love for TV this year.

This little book is our way of celebrating those special moments as well as a chance to look ahead to what's fast shaping up to be a year full of new surprises. And I'm not just talking about when those celebrities whip off their heads on *The Masked Singer*. Although, how good is that?

Here's to another year of TV love.



Kim Portrate CEO, ThinkTV



Kim Portrate





We know what you're thinking: this is a big book chock-full of facts, stats and glorious insights about TV. Wondering where you will find the time to get through it all? Or maybe you've only got a minute or two? Fear not, we've got you.

VOZ is here and it's set to change the way you do TV

All-screen planning for Aussie TV has arrived – and it's been worth the wait. 2021 has been loaded with milestones for TV's shiny new metric which shows, for the first time, deduplicated reach for Total TV. Given so much has happened, you might not be up to speed on the velocity of VOZ and how it can help you. Turn to page 10 now and OzTAM's Doug Peiffer will fill you in.

Beyond the 30 second TVC

These days, there are so many different options for talking to customers. From branded onscreen BVOD pauses to ad breaks that let you choose which ad you see, the future is here for ad formats. But first, it pays to get clear on campaign goals and objectives. Head straight to page 12 where Dr Duane Varan has the scoop on the awesome ad formats worth adding to your next video campaign.

The wonderful world of video advertising

TV is no longer just about the big beautiful tellie in the living room, as much as a whole lot of viewing still happens there. It's an anywhere, everywhere experience. With so many options, how can you possibly know where, when and how to get the most out of TV? We've got a handy guide to get you fully updated. Turn to page 17 for the 21 things we learned about video advertising in 2021.

BVOD continues its growth trajectory

It has been quite the year for Australia's fastest-growing medium. We're talking Broadcaster Video on Demand of course! Massive increases in audiences, tick. Growth in advertising revenue, tick. A new benchmark for viewership, you betcha. Want to find out what's behind all these graphs and charts that impressively just keep on going up? Quick, get yourself over to page 31.

Optus and *The Voice* start with yes to drive consideration. Turn to page 26 to find out more.





WILDEST WATERCOOLER MOMENTS

Throughout 2021, Aussies have turned to TV for information, entertainment and relief. And while we couldn't always gather around the watercooler in the office, that didn't stop Aussie broadcasters from creating moments that got people talking. Here are some of the most memorable:

ARIARNE TITMUS THRILLER CAPTIVATES THE NATION

With much of the country stuck at home, the Tokyo Olympics provided hours of fun for the whole family. But if you had to pick a single moment that rallied the country, it would be swimmer Ariarne Titmus defeating US swimming legend Katie Ledecky in the 400m freestyle. Aussie Aussie Aussie, oi oi oi.



Oprah With Meghan and Harry, 10

A ROYAL RATINGS WINNER

When it aired in March, Oprah's interview with the Duke and Duchess of Sussex was the highest rating program of 2021 so far. The explosive chat brought to light a range of shocking allegations including the couple being cut off financially from their family and that the Duchess of Cambridge made Markle cry before the royal wedding. The drama!

WENTWORTH: THE FINAL SENTENCE

After nine years of incredible performances from some of Australia's most talented actors, this year saw the final instalment of Foxtel's award-winning drama *Wentworth*. Split into two parts, the last season had fans on the edge of their seats and watching their backs as they tuned in to find out how Vera Bennett reacted to Joan Ferguson regaining her memory and whether Allie Novak was coming for Judy Bryant despite the protection order in place.





THE BLOCK CHEATING SCANDAL

Ratings for 2021's season of *The Block* got a boost when contestants Tanya and Vito somehow got hold of the program's schedule at the start of the series before sharing it with former *Love Island* contestants, twins Luke and Josh. The cheating scandal was the gift that kept on giving, coming back to bite the contestants week after week, providing plenty of watercooler fodder for viewers at home as it remained unresolved until the finale.



WELCOME TO VOZ:

ALL-SCREEN PLANNING FOR AUSTRALIAN TV ARRIVES



Doug Peiffer is the CEO of TV audience measurement provider OzTAM.

July 7, 2021 was a milestone in the multi-phase rollout of Virtual Australia (VOZ), Australia's new Total TV database. It marked the commencement of daily data flow to subscribing media agencies.

Now, they could begin to onboard the VOZ database, embed it in their systems and workflows, handle actual VOZ data and provide OzTAM with feedback. All-screen planning for Australian broadcast television was here.

This was both a huge technical achievement and significant step forward for Australia's media industry, creating the opportunity to treat TV – in all its forms – as a whole.

Measurement services around the world have grappled to meld people-based data from representative in-home panels with connected device-based data – a task that has become increasingly complex as viewers shift their habits and consume video content on multiple screens.

Counting the volume of minutes viewed across devices is one thing; determining who is watching, and crucially, the unique audience viewing linear TV and BVOD, is vastly more challenging. After three-plus years in development, VOZ, for the first time, makes it possible to plan and report de-duplicated TV consumption nationally, across devices.

That means advertisers and media agencies can create and post-evaluate media plans for TV inventory across all broadcast channels and devices, and manage their multi-screen campaigns, including de-duplicated audience reach goals on an individual market and national basis. They can also analyse historical linear TV and BVOD viewing patterns across broadcasters, and determine BVOD incremental reach, to aid in future planning and forecasting.

OzTAM offers powerful, interactive tools to access all of this incredible VOZ data.

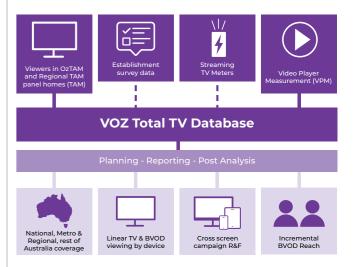
REACH & FREQUENCY (R&F) PORTAL

Media agencies and broadcasters are actively accessing and using this web portal which enables the upload of linear TV spots and BVOD impressions to evaluate campaign R&F results.

What is VOZ?

Virtual Australia, or 'VOZ' is the foundation of Australia's new 'Total TV' reporting standard. It brings together broadcaster viewing on TV sets and connected devices (connected TVs, desktop and laptop computers, tablets and smartphones) to provide all-screen, crossplatform planning and reporting for Australia's television industry.

For more information on how VOZ can help you navigate today's TV, visit <u>virtualoz.com.au</u>



VOZ DASHBOARD

Based on weekly Consolidated 7 'What Watched' viewing data for linear TV and BVOD nationally and by market, subscribers can use the VOZ dashboard to generate reports including program rankings (average audience, cumulative audience, cumulative reach); proportion of audience by screen type; average time spent viewing (ATS) by program; and program audience profiles and indexes.

It's exciting to see how clients are embracing VOZ, along with the responsiveness of third-party software suppliers who are bringing the database to life.

Reflecting OzTAM's commitment to measurement excellence, VOZ provides an objective, independent, transparent and standard metric by which to evaluate the performance of TV content across all screens and platforms. It is consistent with the established TAM (for linear) and VPM (for BVOD).

As viewers continue to embrace television on their own terms, VOZ will bring the insights needed to plan and post-analyse confidently with a true national picture of Total TV performance

THE FUTURE

OF VIDEO AD FORMATS HAS ARRIVED

BVOD and connected TV are opening up a world of innovative ad format options for advertisers. So how can you make the most of them? Dr Duane Varan explains.



Dr Duane Varan is the CEO of audience measurement firm MediaScience, an award-winning media professor and an international authority on all things advertising.

We once lived in a world where TV advertisers had a one trick pony: the 30-second commercial.

There's a lot of great things you can do with those 30 seconds. Ultimately, though, the time constraint brings with it some limitations. And you have to squeeze your objectives within those confines.

However, with the rise of Broadcaster Video on Demand (BVOD) and connected TV, video advertising has entered the digital realm where anything is possible.

Marketers now face a different challenge. They must stop and think, "What is it that I want an ad to do?"

There's already a range of exciting new ad format opportunities. So, in many ways, advertisers are now spoilt for choice.

One of the most mature "new" formats was popularised by Hulu in the United States – the ad choice format that lets you choose which ad you see. We first studied the effects of this ad format back in 2000. What's amazing is that the choice boosts the ad's impact.

It does this by significantly increasing the ad's likeability. You become much more receptive to the ad when you choose to see it. The reason for this is the psychological principle of cognitive dissonance. Because you made a choice, you're now invested in that being the right choice. You're helping the ad work better. The dissonance boosts the likeability and, as a consequence, the memorability of the ad.

We did a study where we added another option which was "surprise me" to the choice mix. What was remarkable about "surprise me" was that it hurt the impact. The reason is that it doesn't matter what you do, it's never good enough. The first thought is always, "You could have given me a better ad."



Another great example of ad innovation is the pause ad. The BVOD pause allows you to run static or dynamic branding which is as powerful as a brand integration. And if you have an ad that occurs at another point in the program, physiologically, that ad will be experienced differently as a result of having seen the pause. It provides a salience to the brand, capitalising on the priming the pause delivers.

Another option is telescopic ads where a short ad allows you to click and see a longer version of the ad. That can be particularly powerful where the initial ad is a teaser to take you into a longer experience. That longer experience might tell you more about the product or it might be a longer version of the narrative. But the added screen real estate enables much deeper opportunities for persuasion.

In the future, we will increasingly see interactive ads that offer game-like experiences. We've tested several incredibly powerful models including one for a toothpaste brand. For this, we created a guessing game around a celebrity's smile which doubled purchase intention, something we rarely see.

Interactivity is particularly powerful because it can be harnessed to the specific needs of an advertiser. But it requires an entirely new skill set to those currently in market – it's a new beast entirely, different to other interactive platforms.

All of these formats deliver value in very different ways. In some cases, you're getting a memory boost or an increase in the product or category salience. Each has its own unique DNA specific to the mechanics of the format and its effects.

To make the most of these opportunities, brands must get specific about the format best suited to their needs and communication objectives.

Fasten your seat belts because we're going to see more and more innovation in this space ■



Every stat tells a story: how TV helped reinforce the importance of the Census

A bespoke campaign of mini-documentaries delivered across multiple platforms drove positive perceptions towards the Census, resulting in enhanced participation.

THE CHALLENGE

With the Census date set for August 2021, the Australian Bureau of Statistics (ABS) wanted to increase awareness by highlighting the value of participation reminding Australians about the direct impact the Census has on them and others.

THE EXECUTION

The ABS partnered with Foxtel Media to create a series of mini-episodes to drive positive sentiment towards the Census.

The series explored the stories behind the statistics such as Melrose Football Club which used Census data to identify refugee communities for the team to support. The content was amplified through native advertising across News Corp and within Sky News editorial.

THE RESULTS

The campaign reinforced the importance of taking part in the Census leading to a 14 per cent increase in familiarity with the Census and a 23 per cent increase among under 40s.

It was an important result since prior to the campaign, young Aussies were less aware of the importance and impact of the Census.

Additionally, the content drove a 6 per cent increase in positive participation, up 12 per cent among the key under 40 demographic.

And people who saw the bespoke content were 1.2 times more likely to believe their participation would make a real difference compared to those who only saw the TVC.

"Foxtel allowed UM to bring to life storytelling at scale, supporting the wider campaign through high dwell formats and trusted community voices.

"The partnership helped the ABS to showcase the intrinsic benefits the Census offers, encouraging people to think more deeply about it and increasing their likelihood to actively participate."

Alice Davidson, Integrated Planning Director, UM





WHY 2021 WAS THE YEAR **ADVERTISERS' ATTENTION** TO ATTENTION

SKYROCKETED

Attention measurement is like that overnight hit song that took five years to write.

It took years of research and foundation work to test and generalise not just whether attention is a valuable metric, but how it can be valuable to the existing advertising ecosystem.

There was no single event that made the industry sit up and take notice, rather a collective understanding that legacy metrics and an impressions currency was failing.

Although I am surprised each time I am asked to explain it, it should not be surprising at all - if there is no human attention paid to an ad, there can be no human impact.



Professor Karen Nelson-Field is the Founder & CEO at Amplified Intelligence and a globally acclaimed researcher in media science.

THE NEED BECAME EVIDENT

There was a definite line drawn in the sand when I guest edited the WARC Guide to Planning with Attention in 2020. I called in experts to discuss three key structural factors for an industry on the precipice of change and the enthusiasm with which they responded showed a real appetite for change.

VALIDATION ON THE TABLE

Leading up to 2021, the validation of attention also became more robust. Across different countries and platforms, we could see generalised evidence confirming what we knew to be the case: attention is a better predictor of sales outcome than viewability.

This is not surprising. Attention is what marketers have always wanted to understand but couldn't due to the lack of capable and scalable outward facing technology. So marketers have settled for second best measures that tell us little about whether a human has viewed the ad or engaged with the brand. Viewability shows us that an ad has been served, but not whether a human viewed it.



HUMAN MEASUREMENT AT SCALE

Viewability technology did its job for a time. It introduced some standards to an otherwise unregulated digital ecosystem, but with advancements in technology we can now actually tell if an ad has been seen, not simply whether it was served.

We can't underestimate what a newly developed capacity for human measurement at scale will do for ours and many other industries.

SOLUTIONS BECAME EASIER

It's one thing to have a big set of data and some deep academic knowledge, but unless it can be applied by industry, nothing will change.

We listened to what brands, publishers and agencies were telling us and we knew that attention solutions would need to add value and be easy to use. In late 2021, we built attentionTRACE, our first media planning product, which has been used in 22 countries. By 2021, it gained traction and three application verticals started to shape the ecosystem - planning, buying and measurement.

This is really the tipping point for any innovation when the early majority trust a product enough to use it with their own business and clients.

THE FUTURE OF ATTENTION

If 2021 was when advertisers started to take attention seriously, then 2022 will be when they (and publishers) start to use it seriously.

The attention economy is here, and every agency holding group, most publishers and many large brands are actively investigating or integrating attention data into their 2022 plans. The early adopters will now be astute users helping the industry discern between the good and bad vendors that will flood the market.

Ultimately, more investment will flow which is great for the advancement of attention technology and uptake across the market. Hold onto your hats

TO ESOV COULD EXTRA SHARE OF BEYOND

VOICE BE THE GROWTH ENGINE YOUR BRAND NEEDS?

ROBERT BRITTAIN POSES THE QUESTION.



Robert Brittain is an advertising effectiveness consultant who has worked with some of the world's leading FMCG and financial services brands across Asia-Pacific.

For many firms, growth is there for the taking.

Whether the brand is B2C, B2B, a pure online play or has a mix of online and physical retail distribution, building mental availability is crucial for the holy grail of brand growth.

When a situation arises where the brand is relevant, the likelihood of it coming to mind is determined by how strongly it competes with everything else that may also fit the role.

Brands that have higher mental availability have higher market share. However, mental availability (as with market share) is a competitive metric - as brands rise others must fall.

Advertising plays a critical role in growing mental availability, however, the intensity with which a brand competes for memory is determined by three driving forces: budget, media channels and creative strength.

A middle-of-the-road ad with a big budget can strongly build mental availability. Similarly, a great ad with a middle-of-the-road budget can build mental availability. Budgets of any size can be made to work even harder with the right media choices. Smart advertisers will deploy all.

A simple, empirically proven approach to planning advertising budgets is share of voice (SOV) - the brand's share of total category media spend. Market share growth is more likely among brands whose SOV is higher than their market share i.e. they have "extra share of voice" (ESOV).

Previous analyses of the impact of ESOV have focused solely on its impact on market share.

In the first analysis of its kind, the Advertising Council Australia effectiveness database shows that ESOV is

There are some inherent threats to this powerful methodology that require us to move forwards:

SOV is getting more difficult to measure.

The media marketplace has become increasingly dysfunctional.

Share of search is valuable, but not a replacement for SOV.

strongly linked to mental availability gains and a raft of long-term success metrics, and therefore is an important metric for all. Not only for budget setting but also for the interpretation of results.

The founding principle of share of voice remains critical in planning the investment levels required to build and maintain the mental availability of brands.

However, share of voice needs to evolve and, more accurately, correct for the impact of media channel selection and creative strength which moderates the levels of attention even more strongly and often quite unpredictably.

We typically address these two elements separately. However, it is the combination that ultimately determines the scale with which a campaign can connect with its audience and grab their attention. Therefore a more holistic approach that accommodates these variables is needed







21 THINGS

WE LEARNED ABOUT VIDEO ADS IN 2021

The past year gave us more learnings about video advertising than there were meltdowns on *Married at First Sight*. And if the relentless Blursdays of 2021 messed up your memory banks, we've got you covered. Here's a handy dandy summary of the year's top 21 video advertising discoveries. There's a bit to cover so grab the popcorn and settle in.

01

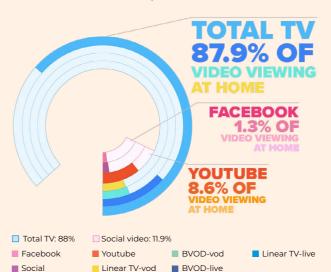
TV remains the king of at-home viewing

There's a sea of choice for viewers hungry for video; from BVOD to Binge, TikTok to Stan and everything in between. But when it comes to video advertising, it's a much more straightforward decision. It seems obvious to say it but it's worth a little reminder: brands can only advertise on video platforms supported by advertising.

To understand viewing patterns across ad-supported platforms, we got OzTAM to blend data from the TV audience measurement panel, along with the national streaming meter panel. And, for the first time ever, we have a snapshot of ad-supported video viewing, at-home and on any device. And what we see is that Total TV commands a thumping great big 87.9 per cent of at home viewing.

AVAILABLE AUDIENCE

Ad supported video viewing: at-home viewing on any device

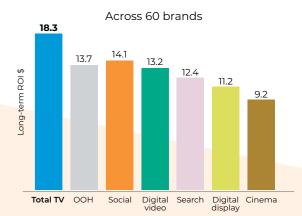


02

TV is great in the long term

Sometimes you run a campaign because you need the impact right away, other times you're in it for the long haul. Lucky Total TV has you covered for both. In 2021, ThinkTV welcomed a new edition of The Payback Series and it found for every dollar invested in campaigns that run for more than three months, brands get \$18.30 back, on average. That's \$4.20 more than the next best channel.

AVERAGE LONG-TERM ROI

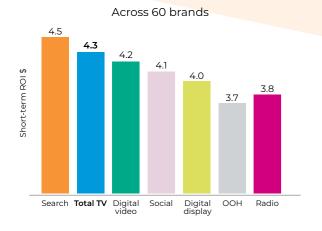




TV delivers in the short term

In addition to its mad long-term skills, Total TV also does a cracking job in the short term. Using a you-beaut econometric model, Payback looked at 60 Australian brands, nine media channels and more than 850 ROI observations to deliver a comprehensive comparison of media platforms. And it found when brands invest \$1 in TV advertising, they get \$4.30 back in just three months.

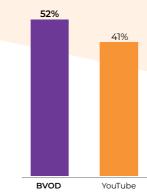
AVERAGE SHORT-TERM ROI



Advertising on BVOD is remembered better than YouTube

It was a big year for new research and in 2021, we ran the Benchmark Series, an epic cross-media advertising effectiveness study that included more than 5,350 participants. And what did Benchmark find? Glad you asked! Benchmark told us that BVOD has stronger memory recall than YouTube video advertising – of any length.

UNPROMPTED RECALL



When MAFS met Specsavers THE EXECUTION

Specsavers combined elements of Nine's Married at First Sight with its own famous 'should have gone to Specsavers' TVC format to develop an engaging and appealing integrated campaign.

THE CHALLENGE

Specsavers stores had been closed during the pandemic. To reaffirm its market-leading position, the brand needed to go big on, well, brand.

Married at First Sight provided the perfect platform to deliver scale, reach and engage Specsavers' target audience via the brand's trademark humour.



Powered Studios created a bespoke integrated TVC that leveraged MAFS IP to align closely with Specsavers famous "Should have gone to Specsavers" advertising format. The 30 second TV ad buy was paired with a tier one sponsorship to ensure maximum frequency of the TVC. By latching onto the "should have" messaging, Nine created context through bespoke creative.

THE RESULTS

Awareness of Specsavers' free eye test increased 14 percentage points from 56 per cent to 70 per cent while consideration increased 4 percentage points for die-hard MAFS fans and 7 percentage points for non-viewers. Perceptions of quality and trust also increased, up 9 percentage points and 5 percentage points, respectively.

Source: Gemba Brand Health Study of MAFS 2021

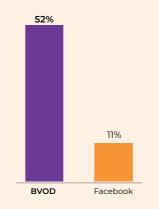
"Nine was really easy to work with alongside AJF. They got there super quick to nail the creative direction, and allowed us to enter into production super-fast. The end result saw website traffic increase 7 per cent, an upside in organic search, and a really strong result from top-line sales across 400 plus stores in Australia and New Zealand."

Shaun Briggs Head of Media, Specsavers

Advertising on BVOD is better remembered than Facebook as well

Benchmark also found ads in BVOD generate 3.7 times better unprompted recall than Facebook video ads.

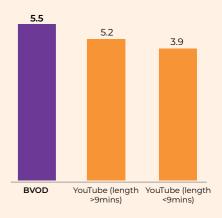
UNPROMPTED RECALL



Ads on BVOD are more likeable than ads on YouTube

Everybody wants to be liked and Benchmark found BVOD ads are more popular than the winning dish on MasterChef Australia. Those loveable BVOD ads generate a 5.7 per cent improvement in likeability over YouTube short-form. They're also more likeable than Facebook ads and video ads on run-of-the-internet sites.

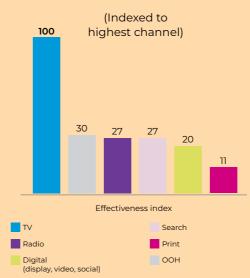
LIKEABILITY



TV's your go-to sales sustainer

It's true that search generates decent short-term ROI but there's something TV has going for it that search doesn't: sales contribution. TV campaigns bring new customers through the funnel generating huge sales volumes. In fact, TV drives three times greater sales volume than any other media.

SALES VOLUME CONTRIBUTION INDEX



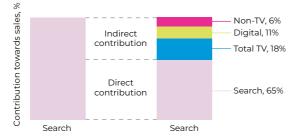


TV has the power to impact search

Paid search can be effective for brands but depending on the category, it can be pricey. And even when it does work, there's only so much you can scale it up since you're talking to customers already in the funnel.

If you want to cut the cost of paid search, and make your search budget work harder, you need to ensure future customers are searching for your brand specifically. When it comes to embedding your brand name in people's heads, TV is the way to go. The Payback research found TV is the number one driver, outside of search itself, contributing 18 per cent towards sales impact. In a nutshell, TV can make your brand famous. And when it does, you can save your search bucks for other stuff. Like more TV.





09

TV supercharges other media in your advertising mix

Just like foreman Keith on *The Block*, TV is also great at making others work harder. In multi-channel campaigns, Payback tells us that TV increases the effectiveness of search by 7 per cent, social by 6 per cent, and video by 4.5 per cent.

CROSS-CHANNEL SYNERGY EFFECT

	Total TV	Search	Social	Non-TV*	Display	Video
Total TV		7.13%	6.02%	5.31%	5.28%	4.67%
Search	7.13%		1.46%	1.30%	1.29%	0.98%
Social	6.02%	1.46%		1.01%	1.15%	0.99%
Non-TV*	5.31%	1.30%	1.01%		0.82%	0.59%
Display	5.28%	1.29%	1.15%	0.82%		0.73%
Video	4.67%	0.98%	0.99%	0.59%	0.73%	

Hungry Survivors drive web traffic for KFC

To drive downloads of its new app, KFC turned to the hungriest people on TV.

THE CHALLENGE

The KFC app puts special offers, app-only menu items, ordering and delivery in the palm of your hand. The QSR needed people downloading the app so they called in the big guns: Jonathan LaPaglia.

THE EXECUTION

In the latest season of *Australian Survivor*, hungry contestants were given the chance to win the ultimate prize to improve their game – a KFC feast! In a partnership that would deliver scale and reach while demonstrating that KFC can elevate any celebration, *Australian Survivor* provided an authentic integration opportunity.

There's no one more appreciative of KFC than a hungry *Survivor* contestant fresh off a challenge.

The KFC reward episode put the brand front and centre with multiple product shots, verbal mentions from host Jonathan LaPaglia and enthusiastic name checks from the constants as they feasted on finger lickin' good chicken.

In additional to in-program mentions, KFC amplified the message via a 10 play BVOD package including pre-roll, display, Premium Pause as well as a branded content carousel curating *Survivor* content. *Australian Survivor* digital companion program *Talking Tribal* also got the KFC treatment with graphic openers and integrated moments.

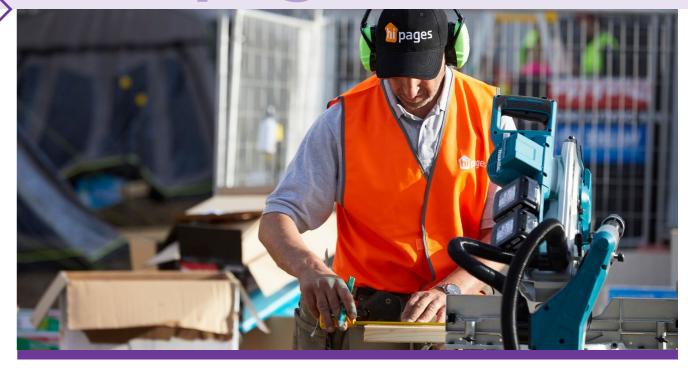
THE RESULTS

The partnership delivered incredible results for KFC with an 80 per cent uplift of new visitors to the brand's website versus average website traffic with a peak uplift of 300 per cent during the episode of the integration.



Click here to see more

TV powers branded search for hipages



Homeowners need tradies and it turns out tradies need TV. Well, the tradesperson marketplace hipages does at the very least.

THE CHALLENGE

To help understand the impact TV was having for the hipages business, ThinkTV commissioned KPMG Australia to undertake marketing mix modelling. The statistical analysis used marketing data to evaluate the past and potential future impact of various marketing tactics.

In went comprehensive business data such as app downloads, job postings and tradie signups. Out came the findings: while search delivered the highest conversion rate, TV delivered the second-highest contributing 11 per cent of hipages' job volume from just a 10 per cent share of total media investment.

But the real eye opener was TV's impact on branded search. Branded search is the difference between searching for hipages or looking up "online tradie marketplaces".

The impact of customers searching for you directly is obvious – it's a gamechanger.

THE RESULTS

The model found TV drove more branded search clicks than any other broadcast media channel and delivered a 39 per cent increase in branded search clicks relative to radio.

What that meant was hipages could dial back its investment in paid search, freeing up budget to do more fun stuff – like installing the hipages lever in the houses on *The Block*.



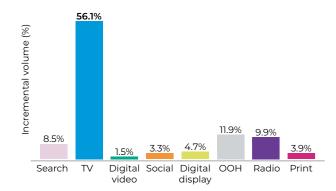


There's a difference between efficient versus effective ROI

While most media channels deliver positive ROI, some are more scalable and can keep generating the same dollar-for-dollar returns at higher levels of investment. That makes the ROI even more valuable. We wanted to find out which camp the most commonly used channels were pitching a tent in so we commissioned another round of the Payback series. And the results were eye-opening with cinema and social video down the small end of the campground with TV glamping it up at the big end of town.

MEDIA DRIVEN INCREMENTAL SALES VOLUME

(% contribution within first 6 months)



11

Video is the least risky investment

When it comes to media, unlike share portfolios, it never pays to bet on a higher risk mix. Why? Because when you risk the media mix, there is only downside. You won't necessarily deliver better efficiencies or growth. So what are the risky bets? Cinema is the most risky, followed by social. On the flipside, digital video and TV bring the most reliable returns time after time. This is because you need consistently high-quality content and audiences to deliver returns and sales uplift. And whether it's live linear or BVOD, TV brings that by the bucket full.

THE VARIABILITY OF RETURNS BY MEDIA CHANNEL 25% Digital Total TV Digital Radio Search OOH Print Social

How Samsung powered Australian Open coverage from every angle

Samsung utilised Nine's Australian Open (AO) coverage to showcase the new Galaxy S21 and its features by aligning with epic moments in play and bringing viewers closer to the action.

THE CHALLENGE

Samsung launched its Galaxy 21 Series embedding it into Australian culture, while creatively showcasing how the device sets the bar in smartphone photographic capability.

THE EXECUTION

Nine's TV coverage of the Australian Open provided the ideal canvas for Samsung to creatively showcase its new product features.

Samsung-enabled epic replays brought viewers closer to the action aligning the brand and the Galaxy S21 with memorable moments in play.

Additional product features such as superior clarity and the ability to capture stills from video footage were demonstrated on *Nine's Wide World of Sports* Fly Cam, which captured footage of the AO precinct, city skyline and outer courts.

The high-value video capabilities of the Galaxy S21 were shown through the shooting of two commercials using the smartphone camera, sending it into the skies of Melbourne via a drone. Meanwhile, the commercials showcased the incredible production values of the Galaxy S21 camera by capturing city sights, Melbourne's famous alleyways, and other cultural scenes to add a local vibe and complement Samsung's global creative.

THE RESULTS

The partnership boosted multiple brand metrics with a 15 per cent increase in people who agreed Samsung Galaxy smart phones have the best quality camera. Plus, there was a 16 per cent increase in perception of expertise and a 13 per cent uptick in the sense of quality.

Source: Gemba Brand Effectiveness Study 2021

"Samsung's shift in consideration was directly attributable to the Australian Open property. We saw a marked increase in website visitations as well as e-commerce and people migrating over to explore and take a look at our products."

Mike Deane, Chief Media Officer, CHE Proximity



Click here to see more

Video commands a solid share in the optimal media mix

Nailing the optimal media mix is right up there on every CMO's list of marketing's most mind-bending missions alongside automation, attribution and all things adtech. But thanks to the Payback series, you can unbend your mind, because we've got a cheat sheet for you. By slicing and dicing three years' worth of real campaign data, Payback has the definitive answer on how to split the pie. Mmmm. Pie.

SHARE OF MEDIA SPEND, %

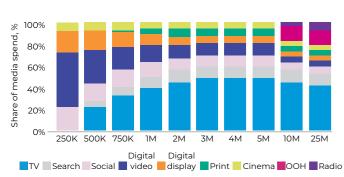


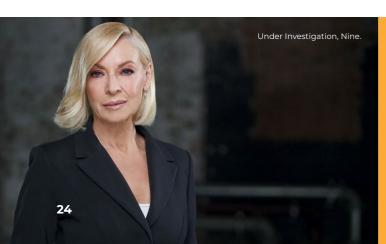
13

The size of your budget may change but the percentage of video shouldn't

Some things go up and some things go down but when you analyse scores of campaigns like Payback did, when it comes to the media mix, the percentage of TV remains consistent.

OPTIMIZED MEDIA DEVELOPMENT BY BUDGET SIZE



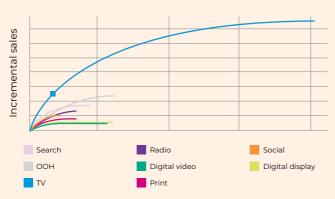


14

TV's rate of return diminishes more slowly than other channels

Your investment in some media channels can go hard early, but quickly flattens off once the channel hits the peak of its reach. So while the ROI might look good initially, every dollar you spend after that sees a slow worsening of ROI. Like a newbie to the marathon, they are fast out of the blocks but quickly fall behind the pack. But not TV. TV continues to drive sales longer and stronger than other channels. The reason for this is diminishing returns. You can invest more in TV and generate nearly three times the growth opportunity from incremental sales compared to the next best channel.

ANNUAL MEDIA SPEND



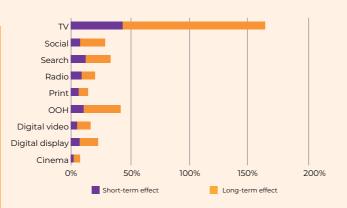
15

TV stands alone in its ability to drive sales

Some things stand head and shoulders above the peers in their field. Like Michael Jordan, Serena Williams and Cristiano Ronaldo. It's fair to say that different media channels differ in their ability to drive sales. It's also fair to say that TV is in a league of its own. When TV is in play, the opposition doesn't stand a chance.

AVERAGE PROPORTION OF MEDIA DRIVEN SALES

(Indexed to proportion of short-term sales)



NRL heavy-hitters help DoorDash punch above its weight

A premium sports partnership drove brand awareness and conversion for DoorDash.

THE CHALLENGE

Entering the Australian market in 2019, DoorDash wanted to build brand awareness and let Australia know it had arrived.

In a category with two strong competitors, DoorDash needed to create a sense of scale to avoid being perceived as just another food-delivery service.

THE EXECUTION

DoorDash partnered with the NRL to position itself as NRL's convenience "On-Demand Delivery Partner" and drive awareness of its point of difference, a delivery service that delivers 'restaurants and more to your door'.

Foxtel Media connected DoorDash with millions of Australians through a targeted, integrated partnership across its key sports platforms, Fox Sports, Fox Sports Digital and Kayo. This was the perfect partnership for DoorDash to grow awareness and stand out in a clutter-free, premium environment.



THE RESULTS

Over the course of the sponsorship DoorDash effectively drove measures of awareness, familiarity, perception and share of last five orders.



Among Foxtel NRL fans who use delivery companies, the partnership led to a 23 per cent increase in



spontaneous brand awareness, a 12 per cent uplift in consideration of using DoorDash and a 78 per cent increase in DoorDash's share of last five orders versus other delivery companies.

"Our Fox League partnership helped solidify DoorDash as an official partner of the NRL, reaching fans across all touchpoints within the Fox network. It's been instrumental in driving both brand and activation."

DoorDash marketing team

MasterChef Australia sends Coles cauliflower into the stratosphere

A bespoke Mystery Box MasterChef challenge was designed for Coles to highlight a priority seasonal ingredient: purple cauliflower.

THE CHALLENGE

In season 13 of MasterChef Australia, contestants opened their mystery boxes to find the unsung hero of the vegetable patch, purple cauliflower, before being tasked to turn it into something amazing.

Click here to see more

THE EXECUTION

The challenge was an extension of Coles' existing MasterChef Australia sponsorship with every element of the campaign strategically aligned to ensure brand messages made an impact with viewers at home and at the checkout. An integrated playout highlighted Coles' priority brand messaging, including strategic placement of a TVC alongside key moments of the challenge. Off screen extensions across digital and social as well as an integrated program ID and sponsorship billboard rounded out the activation.

THE RESULTS

The partnership delivered some impressive results for Coles with purple cauliflower sales up an astounding 430 per cent after the mystery box challenge aired.

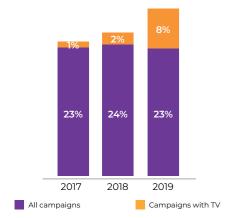


Campaigns including video are becoming more effective

Through analysis of Australia's most effective campaigns, as judged by the rigorous Effie Awards, one medium stands out from the crowd when it comes to building effective campaigns. Want to guess which one? Yep, it's TV.

From 2017 to 2019, 65 per cent of Australia's most effective campaigns had TV at their heart. What's more, between 2018 and 2019, campaigns that included TV experienced a step-change increase in effectiveness. And in 2019 – remember 2019? Back before QR codes came into their own – TV-led campaigns also saw a significant increase in brand profit growth.

% OF CAMPAIGN STATING V. LARGE EFFECT



Optus and The Voice start with yes to drive consideration



Click here to see more

Optus effectively strengthened its brand recall and consideration by using powerful stories from *The Voice* that started with "yes".

THE CHALLENGE

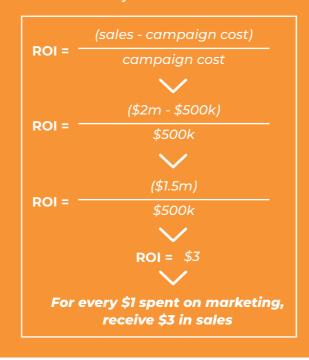
Following a strong Olympics and Paralympics campaign, Optus was looking to keep strengthening its brand platform, 'It starts with yes'. *The Voice* was identified as a core program to reach the target audience of 25-to-54-year-olds with children living at home.

Leading directly off the Olympics, *The Voice* was the perfect vehicle to maintain the brand's momentum also offering integration into moments rich in optimism and a platform that celebrates how Australia is geared to make great things happen.

After all, every journey on *The Voice* starts with "yes".

Encyclomedia:What's the story with ROI?

ROI (or ROMI) is a great way to compare the effectiveness of campaigns but you've gotta be careful how you interpret the results. To give you an example, let's say every \$1 in campaign spend generates \$3 in sales. But the return is not linear, and sales generated diminish as spend increases. The rate of diminishing returns varies by channel and is limited by the reach of the channel.



THE EXECUTION

Using program footage, 7RED created integrated TVCs, play offs and 7plus digital assets that turned the powerful moments of 'yes' within *The Voice* into commercial content for Optus. Using brand collaboration, program IP was taken to a whole new level. Integrated TVC assets were delivered in record time, testament to the great fit of the incredible stories on *The Voice* and the Optus brand.

THE RESULTS

Leveraging the key moments within *The Voice* enabled Optus to bring its iconic "it starts with yes" campaign to life in a new way with powerful results. The integrated TVC that ran within the program delivered a 20-point increase on recall versus a standard brand TVC.

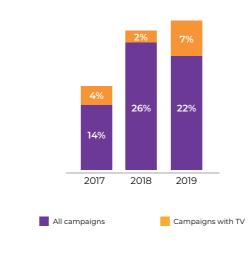
And using the real stories of artists significantly shifted consideration among core audience segments with a 12-point increase on mobile consideration, which shot up to 18 points for family viewers and 21 points for cross platform viewers. Meanwhile, broadband consideration jumped 15 points, increasing to 23 points for family viewers and 33 points across platforms.

17

Campaigns with TV at their heart acquire more customers...

Who doesn't want more customers? We know you do! The Effie's analysis found TV-fuelled campaigns are best to get an uptick in customer acquisition. #winning

% OF CAMPAIGN STATING V. LARGE EFFECT

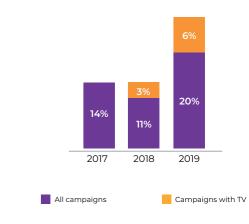


18

...and increase market share

The trifecta of increased brand profit, customer acquisition and long-term market share growth is hard to beat and the Effie's analysis found campaigns with TV at their core saw an increase in long-term market share growth. Sales growth, profit growth and growth in market share? You won the trifecta.

% OF CAMPAIGN STATING V. LARGE EFFECT



Putting Australia back into a great Australian brew

Together, the Summer of Cricket and Bundaberg dominated the Aussie summer.

THE CHALLENGE

Bundaberg Brewed Drinks wanted to become Australia's number one non-alcoholic beverage owning the Australian spirit and the occasion of the great Aussie summer.

THE EXECUTION

Partnering with Seven's Summer of Cricket was the only way to truly celebrate Bundaberg's iconic Australian story – a brand steeped in generations of tradition.

A multipronged partnership integration put Bundaberg in the presence of other Aussie legends as cricket greats chatted about the game while standing beside the Bundaberg Barrel.

Helping to recognise Big Bash League legends, the Bundaberg Best and Fairest drove commentator and audience engagement. And the Bundaberg Squeeze aligned to putting Bundaberg at the heart of thrilling, live, in-match moments.

By immersing Bundaberg within Australia's national sport, the brand was able to maximise reach, visibility and its distinctive Australian-ness.

THE RESULTS

The partnership helped Bundaberg achieve four key goals: the brand grew three times faster than the category, up 18 per cent year-on-year. Secondly, Bundaberg built awareness with an 11 per cent uplift. The brand increased purchase consideration by 26 per cent, now sitting at a monumental 85 per cent. Finally, Bundaberg took its rightful position as Australia's number one soft drink.



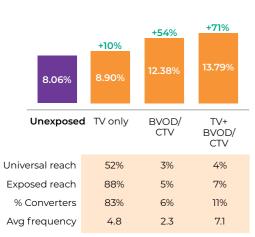


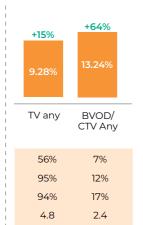
The gap in effectiveness is widening

Ultimately, analysis of Effie award winning campaigns found the gap in effectiveness between campaigns that include TV versus all campaigns is widening. Australia's most effective campaigns can't be wrong.



BROADCAST CONVERSION RATE





20

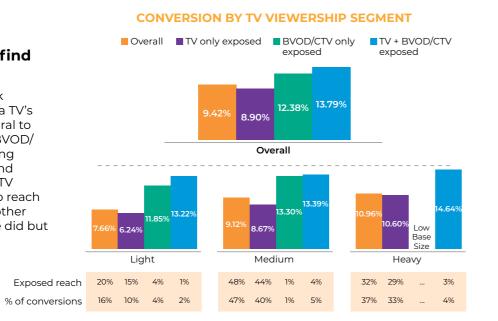
TV and BVOD together make a stellar team

This year, thanks to Samba TV, we learned TV is great at driving website visits. Samba TV worked alongside insurer NIB to understand the impact ad exposure has on visits to the NIB website. And what they found was exposure to a combination of TV and BVOD/Connected TV (CTV) resulted in the highest lift in website visits.

2

BVOD is a great place to find light TV viewers

On top of getting people to click through to NIB's website, Samba TV's research found BVOD was integral to reaching light TV viewers with BVOD/CTV-only households contributing the largest incremental reach and conversions among those light TV peeps. Turns out the best way to reach light viewers to the TV set is another form of TV. Who knew? Well, we did but it's nice that others do too.









BREAKING DOWN THE GROWTH OF BVOD

In 2021, BVOD experienced a growth trajectory that left other media platforms in its wake. So what is it about BVOD?

Broadcaster Video on Demand, aka BVOD, has hit critical mass.

It's grown from a smaller sibling into a fully-fledged video powerhouse. From Foxtel Go, Foxtel Now and Kayo to 9Now, 7plus and 10 Play, the ad supported streamers of Australia's broadcasters continue to go from strength to strength. They're the new powerhouse on the video block.

With impressive reach and the ability to target logged in viewers with tailored advertising based on geo-targeting and demographics, it's really little wonder media buyers call BVOD Australia's fastest-growing media channel. Because, well, it is.

VIEWERSHIP ESTABLISHES A **NEW BASELINE**

Off the back of a dramatic increase in consumption during the first Covid lockdowns, BVOD established a new baseline for viewership. More than 25 million hours of BVOD content are being consumed every week as more and more Australians embrace the platform. You'd have to stay awake for 2,853 years straight to watch all of that content!

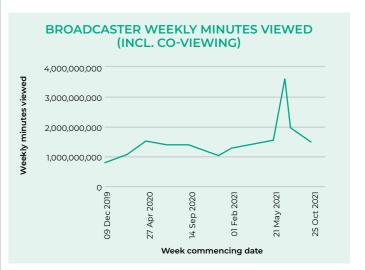
In 2020, BVOD was already experiencing a growth trajectory but in 2021, it got a massive shot in the arm from the Olympics. That's the big spike on the chart to the right which saw millions of people trying out BVOD for the first time - clearly, they liked what they saw since after the event, viewing has remained above the 1.5 billion minutes per week mark. That's a whole lotta Love Island right there.

♦ BVOD REVENUE SKYROCKETS

And viewership isn't the only thing that's on the up and up. As more and more advertisers discover the benefits of BVOD, ad spend on the platform is skyrocketing.

For the six months to 30 June 2021, revenue was up 74.8 per cent to \$145 million while the total financial year brought in \$278 million, an increase of 63.4 per cent year-on-year.

The reason for this increase? Every day, more marketers are catching on to BVOD being an effective advertising channel and are coming to join the BVOD party. It's a fun crowd, all the movers and shakers are there, moving and shaking.



EFFECTIVE AND EFFICIENT BVOD

And once those advertisers dip their toe in the BVOD waters, they tend to dive in. The reason? Adding BVOD's like adding a little turbo-charge to any campaign.

The Benchmark Series research tells us that the combination of TV and BVOD generates twice the sales impact of TV paired with social video. Benchmark also tells us that ads on BVOD have stronger memory recall than any form of YouTube video advertising delivering 1.3 times greater unprompted recall. They're also great at driving conversions with a Samba TV study finding ads on the platform are super successful at getting people to take action.

If you like the idea of adding a bit of nitro to your media mix, then take another look at BVOD



BUILDING A FOUNDATION FOR TOTAL TV

Proudly supported by ThinkTV, the MFA Television Foundations Certification has been developed with the help of all Media Federation of Australia agency members.

Now, more than ever, media buyers are having to navigate a fast-paced and evolving industry. To expedite the learning process, more than 30 experts from broadcasters and agencies have developed the MFA Television Foundations Certification.

The course runs across a 10-week semester in autumn and again in spring, setting a benchmark for television proficiency. Designed for everyone and anyone at any level, the program has a special focus on bringing TV buyers with less than two years' experience up to speed.

To date, 840 TV buyers have completed the course representing more than 20 per cent of the TV buying community.

These grads are now equipped to get the most out of Total TV campaigns and to understand changes in the TV landscape, from the consumption of content on multiple devices to the array of trading options and data sets.

The course aligns the industry on the all-important lingo of Total TV with key learning outcomes including:

- Gaining an understanding of the Total TV landscape
- Deciphering key terminology and calculations
- The TV planning process and different buying/trading models
- Factors influencing cost and value that drive successful TV campaigns
- Evaluation and measurement of Total TV
- What's coming for the future of TV
- A thorough understanding of Broadcast Video on Demand (BVOD)



And in 2022, Television Foundations is expanding! Get ready for a companion program focused on 'How to Buy TV' that gives TV buyers the chance to apply the knowledge gained from TV Foundations.

To find out more, contact ThinkTV today.

The Today Show, Nine



WHAT'S ON THE BOX IN 2022



SEVEN

There will be sequins, saucepans and lycra on offer at Seven with the network programming a jaw-dropping list of tentpole shows in 2022. After its triumphant return to Seven and 7plus in 2021, the global sensation *Dancing with the Stars: All Stars* will burn up the dance floor in 2022.

The Voice is also back. Aussies fell in love with the contestants and the superstar coaches, with the addition of UK pop icon Rita Ora proving a hit. For *The Voice* fans, look out for the global-first, **The Voice: Generations.**

One of the most loved shows on Aussie TV, *My Kitchen Rules,* returns and the home renovation genre will be taken to a whole new level with *Apartment Rules,* a program that will – in an Aussie first – be entirely shoppable.

If it's lycra you're after then Seven won't disappoint with an action-packed year full of massive sporting events beginning with the *Olympic Winter Games Beijing 2022* taking place in February as well as the *XXII Commonwealth Games* just five months later.



NINE

Over at Nine, a slew of new and returning programs kick off with the much-watched series *Underbelly*. In 2022, the crime drama turns to the bizarre disappearance of Melissa Caddick in *Underbelly: Vanishing Act.* Staying with drama, the new gripping series *After The Verdict* tells the story of four very different Australians who have just finished jury duty on a high-profile murder trial.

Crime remains in the spotlight for *Australia Behind Bars*, presented by Melissa Doyle. The eightpart series offers unprecedented access to three maximum security prisons. Meanwhile *Missing Persons Investigation* goes behind-the-scenes





to find missing loved ones and bring them home. And *Million Dollar Murders* investigates the toughest crimes to crack.

On a lighter note, or maybe not given the red-hot property market right now, Nine will enter the luxury real estate market of Byron Bay in new series **Buying Byron**.

And *The Block* is set for a "tree change" in 2022 when it heads to the bush to transform a set of country houses.

The feelgood, family-friendly format of *Lego® Masters* returns in 2022 alongside *Celebrity Apprentice Australia* featuring one of Australia's most inspirational women, author and athlete, Turia Pitt alongside comedy radio duo Will and Woody.

Also back on Nine in 2022, *Australian Ninja Warrior* and *Beauty and the Geek.* And, of course, Australia's biggest guilty pleasure, *Married at First Sight*, returns for its ninth season.



10

Australia can't get enough of Lady Julia Morris and Dr Chris Brown. The duo return to the Aussie jungle for their eighth season of *I'm A Celebrity... Get Me Out Of Here!* while *Australian Survivor: Blood v Water* will see players competing in pairs, bound by blood. And if that's not enough adventure, then grab your backpack, lace up your runners and don't forget to pack your passport because *The Amazing Race Australia* is back, racing around the world in 2022.

MasterChef Australia: Fans & Favourites sees 12 fresh-faced foodies face off against a dozen of the best chefs ever seen in the MasterChef kitchen. Love guru Osher Günsberg is back at the helm for all the romance, drama, roses and twinkling fairy lights of The Bachelor and The Bachelorette Australia.

Boasting the biggest local and international stars *The Masked Singer Australia* returns for a new series of spectacle and speculation while *Hunted Australia* is set to be appointment viewing. This radical social experiment sees ordinary Australians go on the run, attempting to avoid a crack team of expert hunters.

No less nerve-racking – but a lot more heart-warming – *First Dates Australia* will help singles from all over the country find a very special someone.

And calling all human lie detectors! **Would I Lie To You?** Australia – based on the hilarious hit UK format
– is making its way to 10 in 2022. Host Chrissie Swan
directs two teams as they navigate the far-fetched to
the perfectly plausible.

For even more LOLs, *Have You Been Paying Attention?* is back for its 10th season while *The Cheap Seats* will continue to whack on Tuesday night's funny bone.

And there's good news for animal lovers as the quest to find lonely dogs their fur-ever home continues in *The Dog House Australia.*



01 Australian Ninja Warrior, Nine **02** The Block, Nine.

03 Lego® Masters. Nine.

FOXTEL

Headlining Foxtel's local LifeStyle offering is **Selling** Houses Australia spin-off series Selling in the City, hosted by interior designer Rosie Morley and landscape expert Paddy Milne. The millennialskewed program will feature clever solutions for small spaces.



Also new to Foxtel in 2022 is *The Repair Shop* Australia. Based on the popular UK format, host Dean Ipaviz leads a team of skilled craftspeople who come to the rescue of treasured possessions.

And if drama is more your scene, then 2022 will bring the long-awaited *Game of Thrones* preguel, House of the Dragon, and more exclusive dramas with *The Cleaning Lady*, DC superhero series *The* **Peacemaker** and dystopian miniseries **DMZ.** Also coming in 2022, *Shining Vale* starring Courtney Cox, and **Somebody Somewhere,** a new comedy series starring Bridget Everett.

Award-winning comedy-drama series *Upright* will return for a second season. Also coming is *The* Twelve, a gripping courtroom drama that tells the story of 12 ordinary Australians selected for jury duty in a murder trial.

Returning international favourites include Ridley Scott's **Raised by Wolves, Euphoria** and new seasons of Righteous Gemstones, Young Rock, A Discovery of Witches, and Outlander.

Returning Foxtel Originals include *The Great* Australian Bake Off as well as LifeStyle's most loved franchise Selling Houses Australia which returns for a refreshed 14th season.

Grand Designs Australia is also back alongside Deborah Hutton's Find Your Dream Home, Gogglebox Australia and Celebrity Gogglebox Australia.

For the sports fans there's cricket, NBL, WNBL, Super Netball Season, Supercars and Formula 1, Boxing, Golf, AFLW, NFL, Surfing and more.



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