

Gemba

SEPTEMBER 2024

THE POWER OF BROADCAST SPONSORSHIPS

Gemba's Trifecta for Maximum Impact

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Gemba has an extensive broadcast and creative effectiveness database

Gemba are the market leader in broadcast effectiveness measurement. We partner with Australia's leading broadcasters across free to air, BVOD and pay TV.

Over the past five years, we have measured:

- **80+ studies across entertainment and sport**
- **420+ brands**
- **800+ creative assets**

This report unpacks the power of broadcast sponsorship and Gemba's key ingredients to success.



Gemba's trifecta for maximum broadcast sponsorship impact

TV (broadcast + BVOD) still provides a broad reach to engage viewers. It is a key media channel that cannot be undervalued. Most importantly the inventory quality that TV provides is second to none.

Networks and sponsors can leverage different assets from TV ads to drive sponsorship recognition through to broadcast assets which are integrated in the context of the program.

Through our research over the years, Gemba has identified the 'broadcast effectiveness trifecta', three key ingredients that together maximise the effectiveness of broadcast sponsorship.

If achieved, this 'trifecta' helps brands see a greater tangible impact on metrics such as awareness, consideration, positive perception shifts, and purchase or usage intent.



- 01 A CONSISTENT APPROACH**
- 02 BRAND ALIGNMENT**
- 03 TAILORED & INTEGRATED**
- 04 WRAP-UP**

Contents

Whilst viewers are spoiled for choice today, the reach and popularity of free-to-air broadcasts provide brands with unparalleled exposure

THE REACH OF BROADCAST VIA FREE-TO-AIR TV (BROADCAST + BVOD)

20.1m

Total free-to-air TV (Broadcast + BVOD) reaches more than 20.1m Australians each week – but what is the most effective way to get noticed?

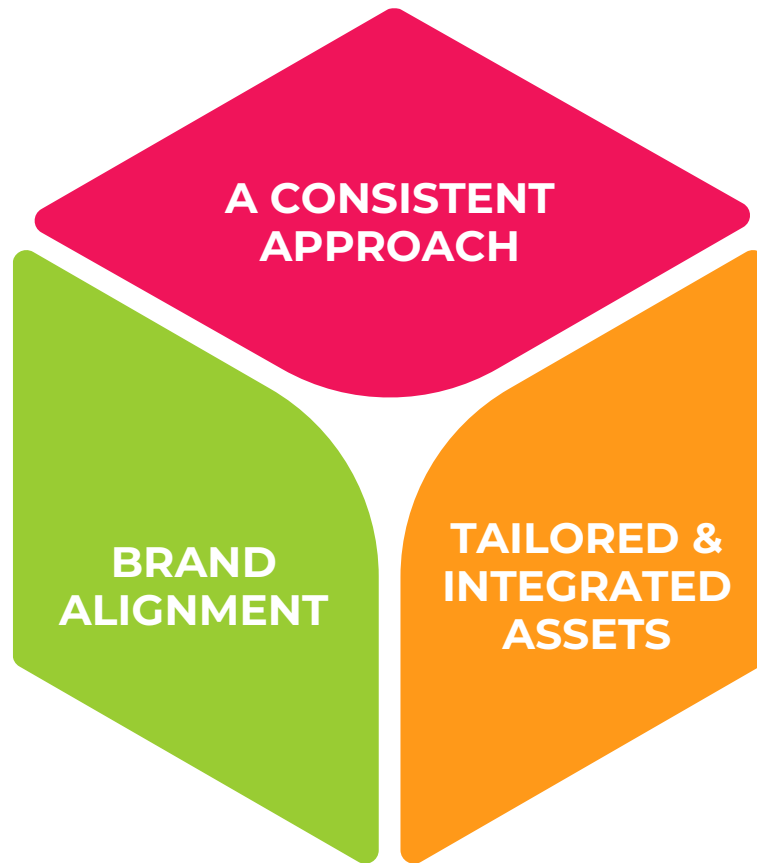
KEY INSIGHTS

- One of the key advantages of broadcast sponsorships is the extensive reach and exposure they provide.
- Whether it's a live sport or entertainment shows, sponsorships offer brands access to a large and diverse audience base.
- This broad exposure helps increase brand visibility and awareness, reaching consumers who may not have been previously familiar with the brand, or to further deepen brand knowledge and affinity among those who are aware of the brand.
- By sponsoring programs or events that reflect their values and interests, brands can foster a sense of affinity and connection with viewers and fans alike.

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Gemba believes three ingredients maximise broadcast impact

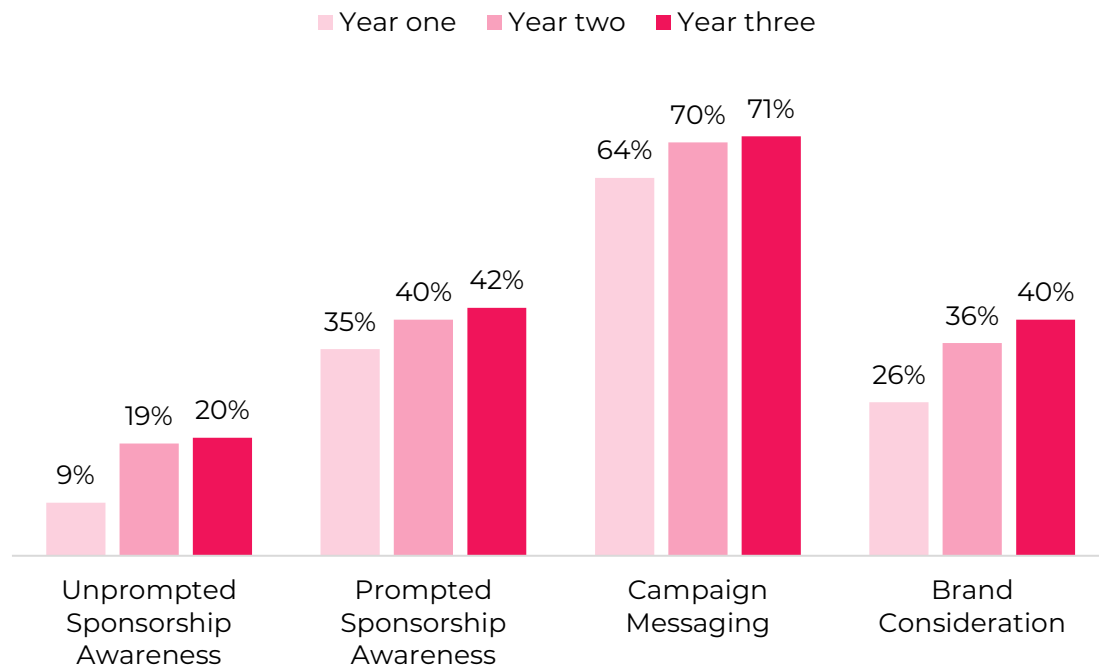
THE 'TRIFECTA' FOR MAXIMUM BROADCAST IMPACT





Gemba's data shows that the combination of a consistent approach, brand alignment and integrated assets can drive meaningful impact

BRAND CASE STUDY | THE 'TRIFECTA' IMPACT WHEN ALL THREE INGREDIENTS ARE PRESENT



CASE STUDY DETAILS & LEARNINGS

The case study looks at a well-known brand with universal brand awareness. All three ingredients were present during this broadcast sponsorship:

- 1. Consistent themes and messaging across the three-year sponsorship:** Allowed the brand to build meaningful sponsorship connection
- 2. An endemic brand sponsorship with an entertainment tentpole:** Fast-tracked connection and maximised performance
- 3. Integrated broadcast assets including TV commercials, brand segments and products within the show:** Meant the brand stood out and provided multiple avenues to communicate messaging and impact brand metrics

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A CONSISTENT APPROACH



01



KEY INGREDIENT #1: A CONSISTENT APPROACH

The most important metric for sponsors is connection.

However, the relationship between prompted sponsorship awareness and spontaneous awareness is not linear, so a consistent approach over time is needed to build connection.

IMPLICATION FOR BRANDS:

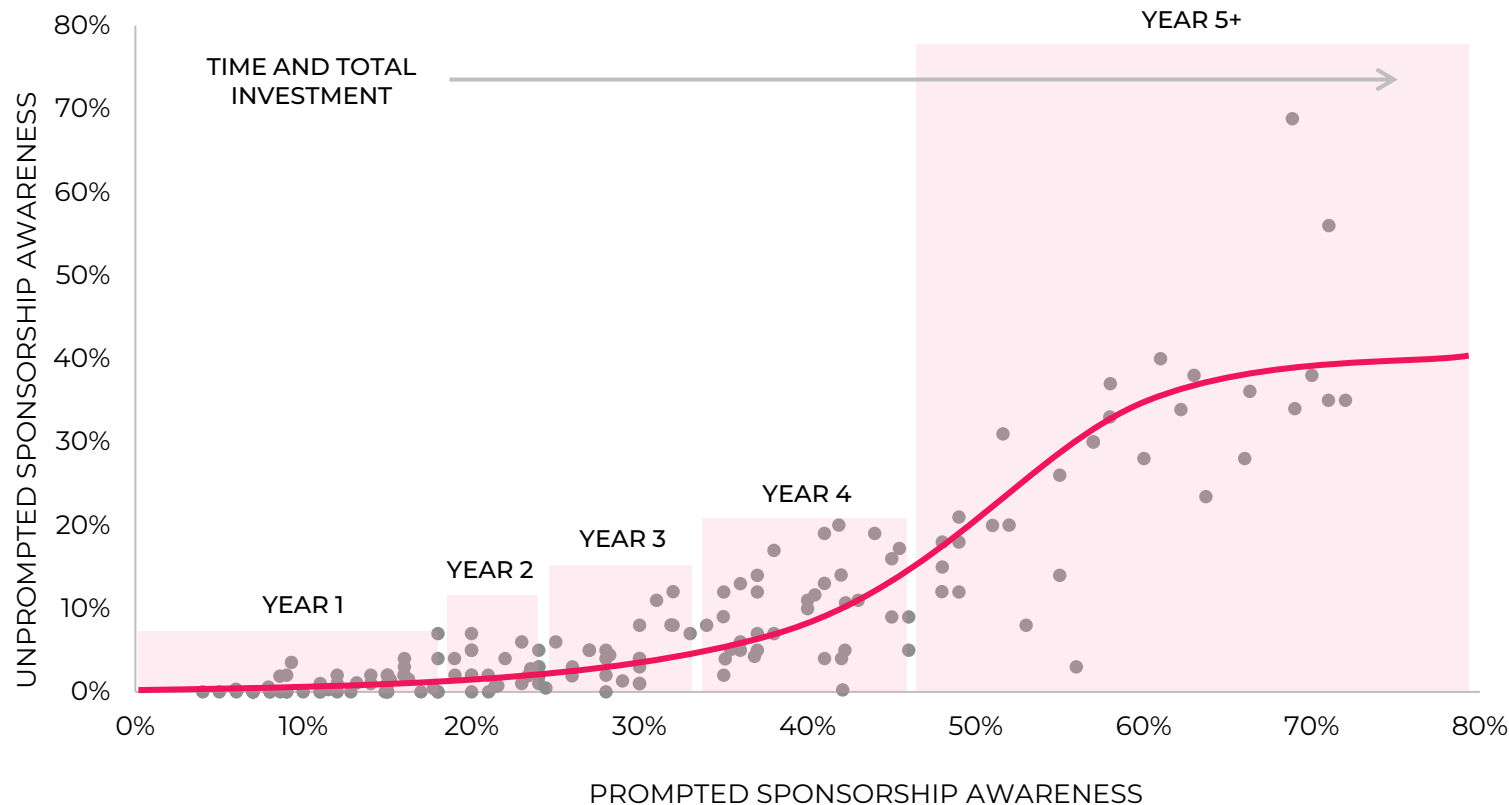
Without recognition, brands simply cannot connect with fans on the level required to impact deeper brand funnel metrics. Sponsorship connection takes time to build through consistent and meaningful exposure.





A consistent approach enables brands to build connection, with exponential growth not typically occurring until year 4+

THE IMPACT OF CONSISTENCY ON BROADCAST SPONSORSHIP AWARENESS



KEY INSIGHTS

- Key ingredient #1 is a consistent approach which allows brands to build connection and lays the foundation for success.
- The most universal metric to measure a broadcast sponsorship is by its level of prompted and unprompted awareness, as it can be compared to other sponsors and properties.
- Through Gemba’s research, we developed a line of best fit for sponsorship awareness, which provides a benchmark for sponsorship performance.
- As per the chart on the left the performance of a broadcast sponsorship is not linear and evolves through a range of phases.

Source: Gemba Brand Impact Studies (Sport and Entertainment)
 n=163 brands
 Note – This timeline has been developed using a broad range of sponsorships and is to be used as a guide

A CONSISTENT APPROACH



A consistent approach drives viewers along the conversion funnel improving brand metrics that one-hit wonders cannot achieve

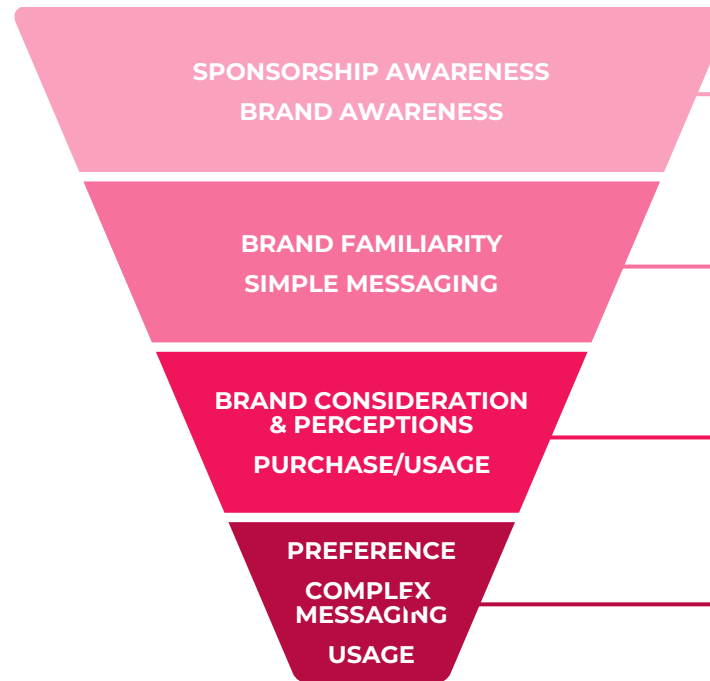
CONSISTENCY AND THE SPONSORSHIP BRAND FUNNEL

Advertising, at its core, aims to build memory structures, a long-term goal. Broadcast sponsorships follow this principle, with data from Gemba indicating they can significantly influence brand metrics over time.

Brands at various stages of their sponsorship journey see different outcomes. Early on, sponsorships tend to boost top-of-funnel metrics like brand and sponsorship awareness.

As the sponsorship continues, it becomes more effective at influencing deeper funnel metrics such as brand consideration and messaging.

SPONSORSHIP/ BRAND FUNNEL



THE ROLE OF BROADCAST SPONSORSHIP

INITIAL YEARS

Building initial sponsorship awareness between the brand and the asset.

MID YEARS

Reinforcing brand awareness from initial years and generating a meaningful connection between the brand and asset.

MID TO LATER YEARS

Leveraging the sponsorship to amplify brand campaigns, by now consumers intuitively know the link. Not yet top of mind with viewers.

LATER YEARS

The brand is intrinsic with the asset, it plays a key role in the broadcast/event. These brands come to mind easily when asked.



Westpac's NRL broadcast sponsorship shows how a consistent approach can fast-track results

BEST IN CLASS EXAMPLE | LEARNINGS FROM WESTPAC'S NRL APPROACH

01 DISRUPT THE CATEGORY

- Build a link between brand and sponsorship
- Use humour to bring brand front of mind among viewers and fans

BRINGING FANS THE FOOTY 2023



02 DOUBLE DOWN

- Continue theme to build connection and memorability through campaign continuity
- Increase brand presence and messaging through tailored content

BRINGING FANS THE FOOTY 2024



03 INTEGRATE ACROSS ECOSYSTEM

- Maintain humour for consistency across tailored assets
- Showcase brand to aide connection and normalise presence among fans

CATCH AND KEEP TAILORED CONTENT





Google's AFL broadcast sponsorship shows how a consistent approach can move viewers down the funnel

BEST IN CLASS EXAMPLE | LEARNINGS FROM GOOGLE'S AFL APPROACH

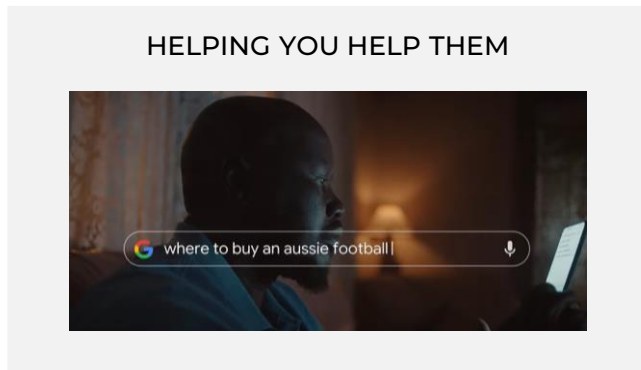
01 DISRUPT THE CATEGORY

- Build a link between brand and sponsorship
- Bring brand front of mind among viewers and fans



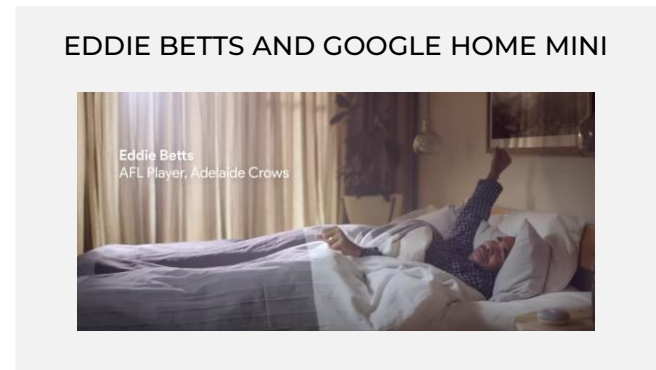
02 BUILD CONNECTION AND FAMILIARITY

- Showcase how Google products are used through the lens of sport
- Build brand love for Google
- Increase perceptions of community and relevance



03 SHIFT FOCUS TO PRODUCTS

- Leverage talent to promote products
- Encourage brand consideration and purchasing behaviour



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BRAND ALIGNMENT

02





KEY INGREDIENT #2: BRAND ALIGNMENT

Brands that are naturally aligned to the category can fast track sponsorship connection through intuitive brand fit and stand out among the clutter.

As the sponsorship market becomes tighter, finding natural brand alignment becomes increasingly hard. A lack of fit can equal a lack of favourability.

IMPLICATION FOR BRANDS:

Natural brand alignment, or misalignment, has a significant impact on broadcast sponsorship performance, therefore brands should look for opportunities that make intuitive sense to viewers as this will deliver stronger results.

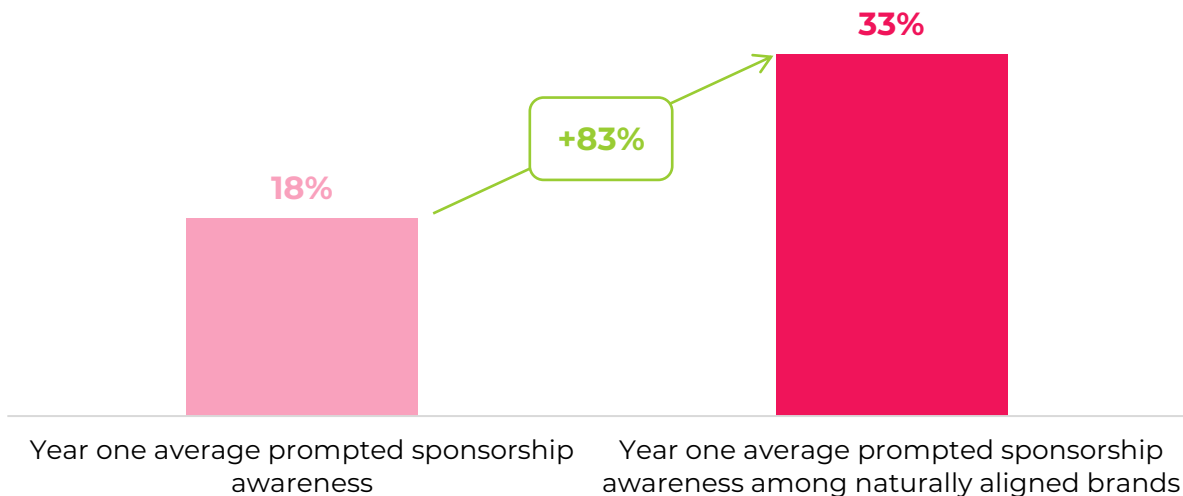




Brands that are aligned to a sponsorship can leverage broadcast assets to move quicker through the sponsorship lifecycle

CASE STUDY | YEAR ONE SPONSORSHIP AWARENESS AMONG NATURALLY ALIGNED BRANDS

AVERAGE PROMPTED BROADCAST SPONSORSHIP AWARENESS | YEAR ONE



EXAMPLES OF INTUITIVE BRAND ALIGNMENT

- Natural brand fit is increasingly difficult, but brands that can find intuitive alignment with their sponsorships can build connection quicker.
- Examples of good brand fit includes:
 - Auto-brands and racing
 - Supermarkets and cooking shows
 - Real estate/ hardware stores and home renovation shows
 - Sports brands and sport shows
 - Music/ audio brands and singing shows

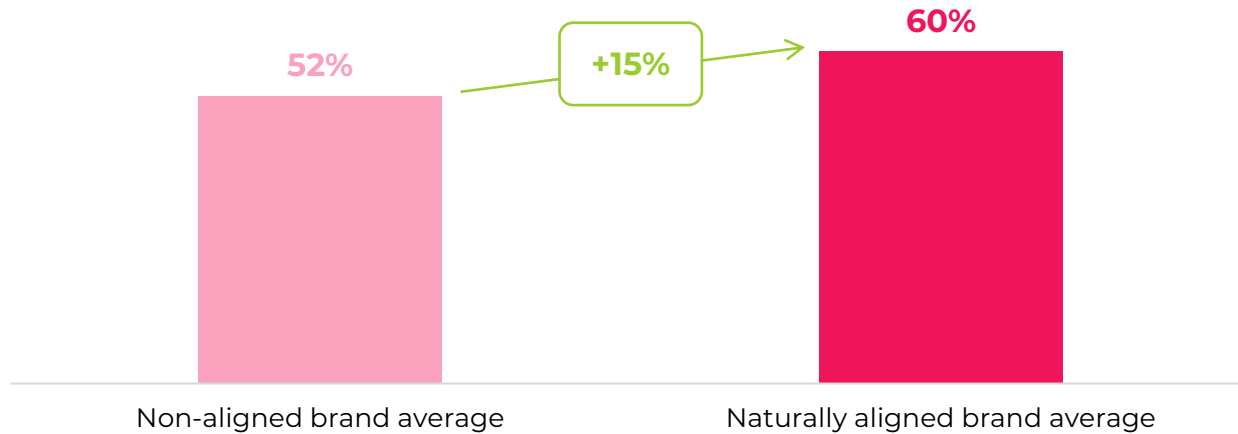
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BRAND IMPACT

NON-ALIGNED VERSUS NATURALLY ALIGNED BRANDS

A natural brand alignment also produces stronger brand affinity as viewers understand the clear connection between brand and sponsorship.

AVERAGE BRAND FAVOURABILITY



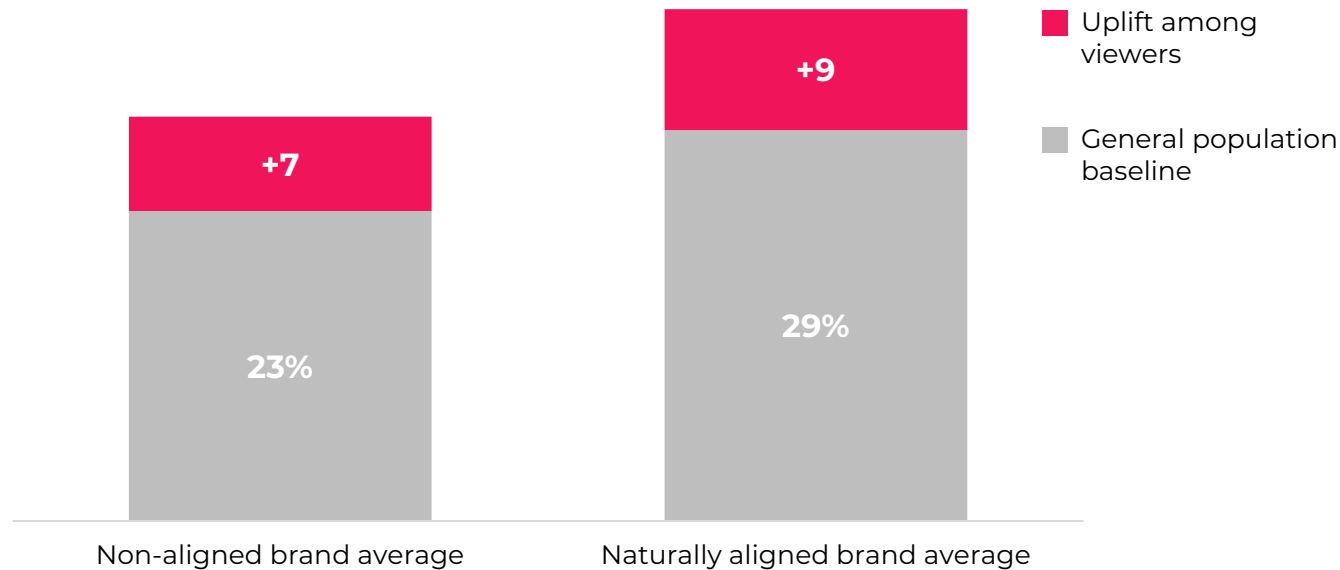
Q. Thinking about [BRAND] sponsoring [BROADCAST], how strongly do you agree with the following statements:
Makes me feel more favourable towards [BRAND].
Source: Gemba's Broadcast Effectiveness Database



Entertainment tentpoles provide a diverse range of brand fit opportunities and can meaningfully impact brand consideration

BRAND CONSIDERATION UPLIFT FROM PRE-WAVE | NON-ALIGNED VERSUS NATURALLY ALIGNED BRANDS

BRAND CONSIDERATION UPLIFT | ENTERTAINMENT TENTPOLES



DIFFERENCES ACROSS INDUSTRIES

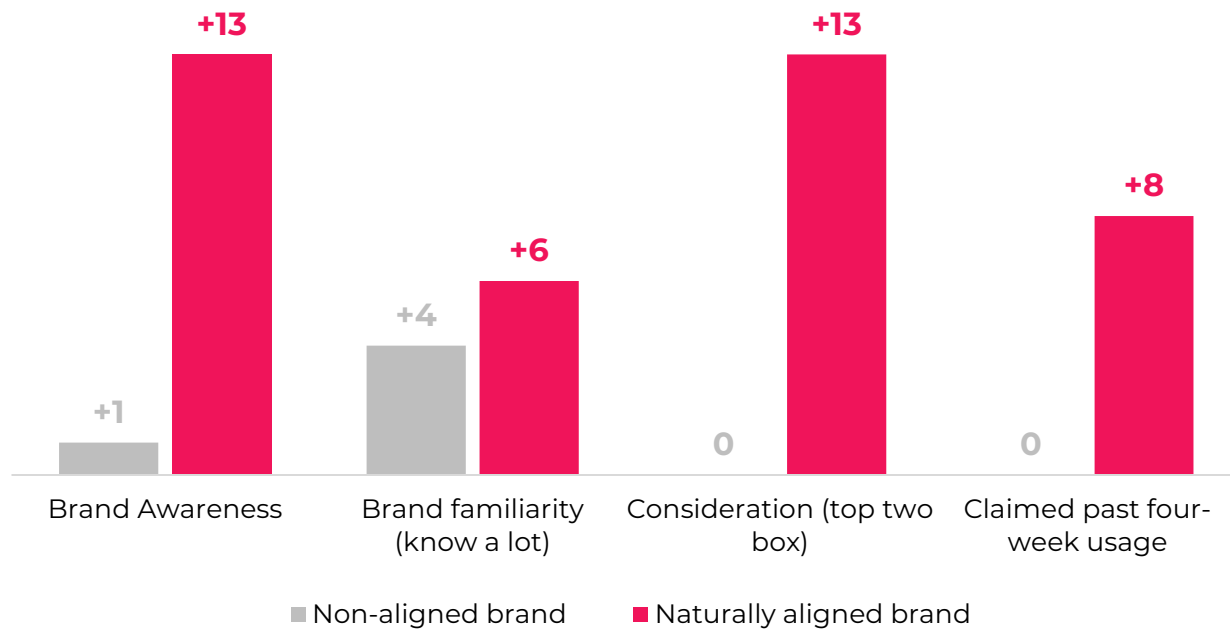
- It is important to note that uplifts across industries vary due to type of product or service.
- Endemic uplifts across industry type (minimum three brands tested):
 - Retail: +12
 - FMCG: +11
 - QSR: +9
 - Auto: +7
 - Hardware/ DIY: +7
 - Technology: +6
 - Real estate: +5
 - Vitamins/ Health: +2



Gemba's data shows that a natural brand alignment significantly impacts broadcast sponsorship performance

BRAND CASE STUDY | THE BRAND ALIGNMENT ADVANTAGE

CASE STUDY | UPLIFT AMONG VIEWERS COMPARED TO TOTAL POPULATION BASELINE



CASE STUDY DETAILS AND LEARNINGS

- The case study compares two brand TV show broadcast sponsorships.
- In one case, the brand alignment was natural and intuitive to viewers, but the other brand was not naturally aligned to the show.
- The brand impact results were significantly better in the scenario where the brand was naturally aligned to the show, exceeding Gemba's benchmarks on all metrics.
- While some impact was seen for the non-aligned brand, the results were limited.
- The case study is an example of how natural brand alignment can positively impact sponsorship performance by fast tracking connection and resonating with target audience.



Finding a natural brand alignment is becoming increasingly harder, but alignment can be earned with consistency and integration

BRAND ALIGNMENT EXAMPLES | THE THREE SCENARIOS

01 INSTANT ALIGNMENT

- Intuitive connection between brand and broadcast
- Brand benefits from fast-tracked results and front of mind association at the expense of competitors



02 NON-ALIGNED BUT EARNED

- Brand alignment not natural but earned through long-term investment in additional activity
- Brand amplifies connection on broadcast through earned activity



03 NON-ALIGNED AND NOT EARNED

- Non-alignment between brand and broadcast with no investment to earn connection
- Short term sponsorship with no consistency to build brand alignment



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TAILORED & INTEGRATED

03



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KEY INGREDIENT #3: TAILORED & INTEGRATED

The market is cluttered and the need to cut through is more crucial than ever. Tailored content and integration across the broadcast sponsorship (e.g. segments, in-show features, and integrations) are key to standing out.

Gemba's Creative Power Score (CPS) is a weighted single-number score that assesses creative effectiveness. In a broadcast sponsorship setting, Gemba's results highlight that content that is tailored to the audience outperform generic content. We also see that tailored content elicits an emotional response which aids connection and increases memorability.

IMPLICATION FOR BRANDS:

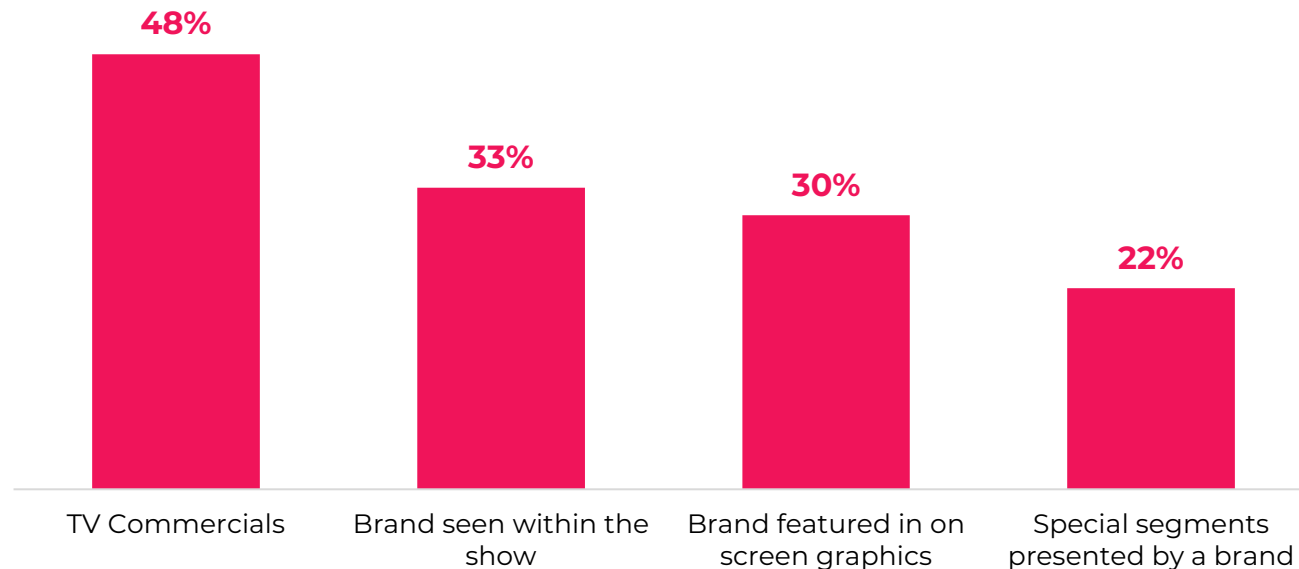
Brands therefore should look to create tailored content and integrate this across the entire broadcast sponsorship ecosystem where possible to maximise impact and ultimately business performance





A fully integrated sponsorship package will produce the best outcomes, TVCs drive recall, and so brands must stand out to fit in

AVERAGE SHARE OF ASSET RECALL | AMONG VIEWERS AWARE OF THE BROADCAST SPONSORSHIP



KEY LEARNINGS

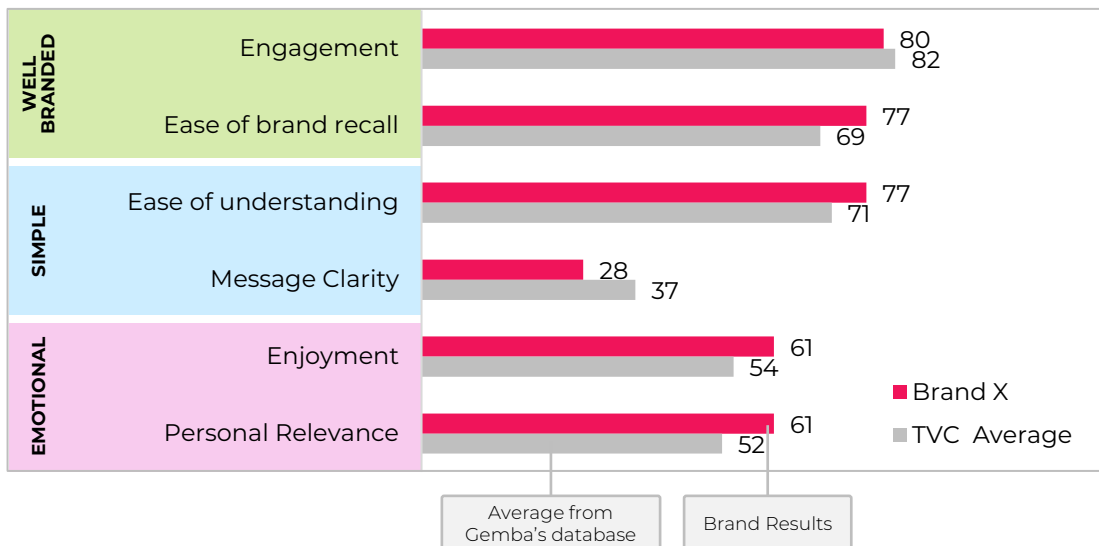
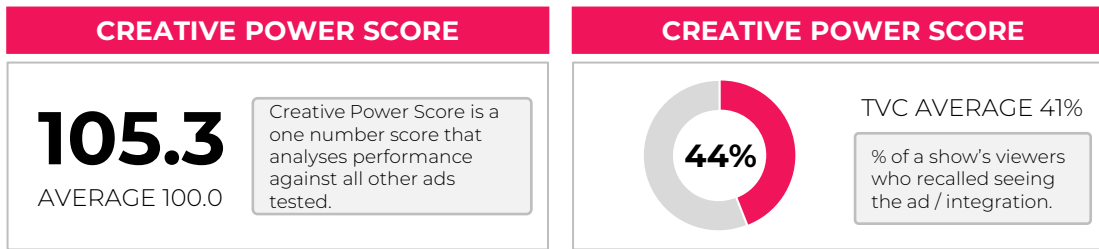
- Broadcast sponsorships are most effective when brands are fully integrated across the show.
- TV Commercials are the cornerstone to driving brand connection but shouldn't be relied upon to do it all.
- Tailored TV Commercials will resonate more with viewers by speaking to them within a sponsorship context that reflects their values and beliefs.
- Other assets can then be leveraged to tell a brand story and ultimately shift brand perceptions and behaviours.

Source: Gemba's Broadcast Effectiveness Database
Npte: Due to the reach and frequency, TVC recall is higher than other assets



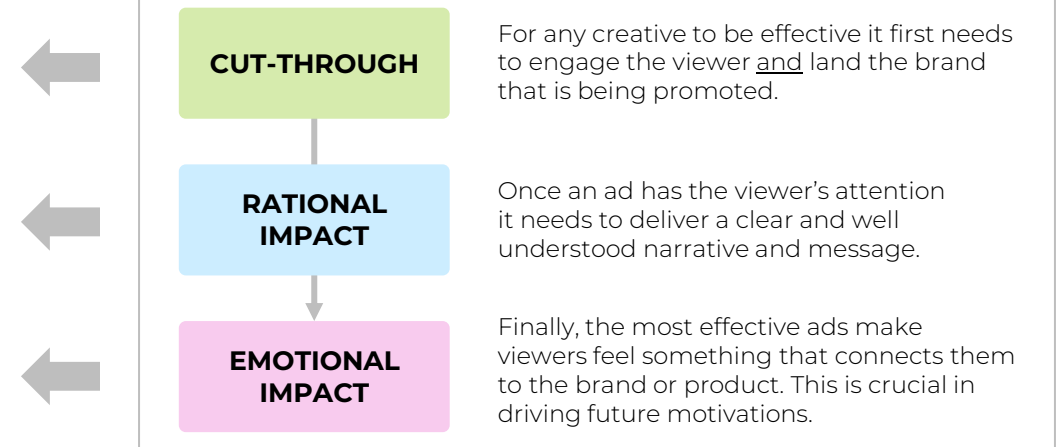
We have developed a Creative Power Score (CPS) to easily assess creative content

INTERPRETING GEMBA'S CONTENT EVALUATION RESULTS | CREATIVE POWER SCORE



ANALYSING CREATIVE PERFORMANCE

The performance of a piece of creative can be highly subjective, however by using an evaluation framework we can evaluate different aspects of its performance.

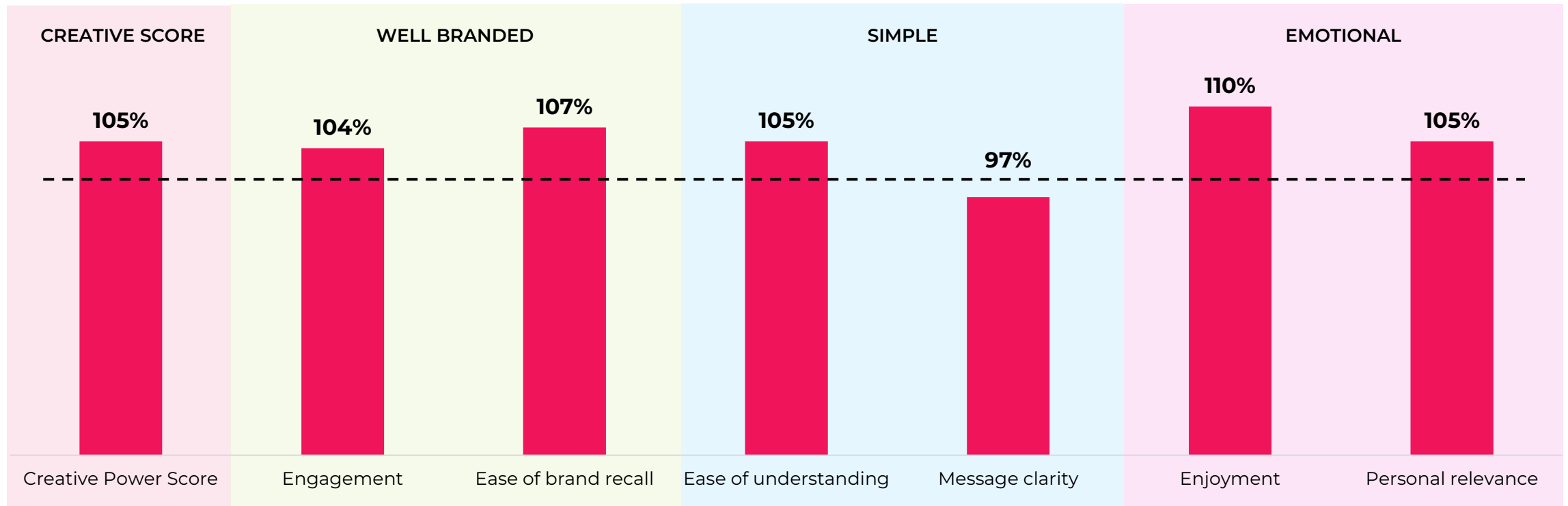


▲ ▼ Significant difference at 95% confidence interval



Tailoring content in a sponsorship setting allows brands to connect with fans and stand out in a crowded sponsorship market

THE IMPACT OF TAILORED TVCS



--- UNTAILORED TVC AVERAGE = 100%

Source: Gemba's Creative Effectiveness Database
n=91 tailored TVCs, n=178 non-tailored TVCs

TAILORED & INTEGRATED



McDonald's have implemented consistent and integrated sponsorship campaigns, via tailored TV ads and integrations

BEST IN CLASS EXAMPLE | LEARNINGS FROM MCDONALD'S AFL APPROACH

McDonald's average CPS score = **106.8**
(The average CPS score is 100, n=23 assets tested)

01 INTEGRATED BROADCAST ASSETS

- Owned ball asset across every game + press conferences
- Broadcast integrations relevant to the game – Friday Night Feed with Campbell Brown + Macca's Half Time

FRIDAY NIGHT FEED



02 TAILORED CONTENT TO STRENGTHEN CONNECTION

- Contextually relevant ads utilising AFL talent. Ads evolve over time to generate repetition
- Effectively leverage talent and IP to address their audience

MACCA MACCA'S AD



03 MOVE TO IN-STORE FEATURES

- Consistent integrated and tailored assets build connection and generate brand alignment
- McDonald's ads have now transitioned to in-store settings which generates consideration and purchasing

WHERE THE GAME GOES AD



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WRAP-UP

04

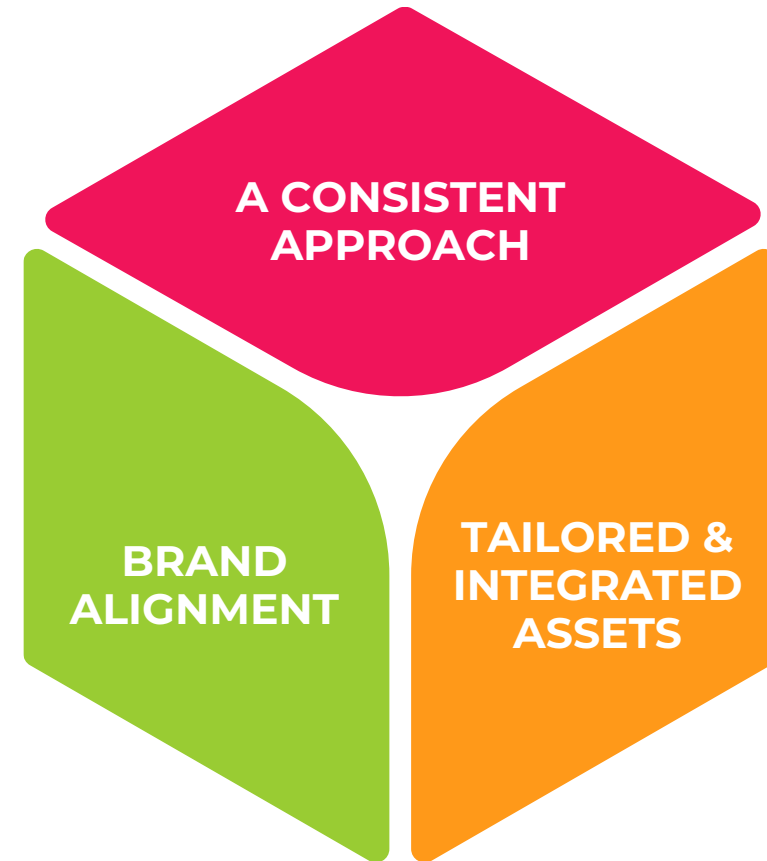
Gemba believes three ingredients maximise broadcast impact

THE 'TRIFECTA' TO MAXIMUM BROADCAST IMPACT

Achieving all three ingredients in Gemba's 'trifecta for maximum impact' may not always be possible for brands. However, our research shows that when these key ingredients work together, they significantly enhance the effectiveness of broadcast sponsorships.

- **CONSISTENCY** enables brands to build meaningful sponsorship connection
- **BRAND ALIGNMENT** can fast-track connection and maximise performance
- **INTEGRATED AND TAILORED ASSETS** creates cut-through and provides multiple avenues to communicate messaging and impact brand metrics

In an increasingly cluttered sponsorship space, brands may be searching for new and creative ways to stand out. However, focusing on Gemba's trifecta can set the foundation for successful broadcast sponsorships.



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Gemba specialises in delivering insights to inform strategies for broadcasters, brands and rightsholders

GEMBA'S CORE INSIGHTS OFFER FOR RIGHTS HOLDERS, BRANDS AND BROADCASTERS

01

SPORT AND ENTERTAINMENT FAN INSIGHTS

Understanding how Australians participate and engage in sport & entertainment.

02

BROADCAST & SPONSORSHIP EFFECTIVENESS

Measurement of broadcast and sponsorship effectiveness for rightsholders and brands.

03

CUSTOMER EXPERIENCE

Experiential and customer experience research to inform strategies and improve services .

04

SEGMENTATION AND JOURNEY MAPPING

Research to identify targeted consumer groups and their behaviour journey

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SPORT. ENTERTAINMENT.

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