

AD RECEPTIVITY: WHICH TV GENRES AND DAYPARTS DELIVER THE MOST AD-FRIENDLY VIEWERS?

One of the most obvious factors affecting advertising impact is consumers' mindsets regarding product/brand information sources such as TV ad campaigns. Often this ties into their feelings about a product or service they are using. At a given point in time, some consumers become dissatisfied with their current brand and are open to switching. Such users tend to be more vulnerable to ads as possible sources of information (e.g. a person whose car is breaking down too often, and is urgently in the market for a new car). On the other hand, many consumers are perfectly content with their current brand and not particularly receptive to the blandishments of rival labels. Over and above such obvious factors is the nature of the product or service (is it personally relevant and therefore more important to the consumer, or is it a household commodity that ranks much lower on the interest scale?) Also at play is the life cycle and general mindset of the consumer: is s/he just starting out after college and buying many products for the first time? Or is s/he an older, more experienced but jaded product user who looks at ads more skeptically? Finally, there is the consumer's personal history with the ads for a given category. Have such ads offered valuable information in the past or have they often proved false or misleading? Put all of these elements together and it is obvious that advertising receptivity varies from one product class to another and, within them, from one consumer to another.

Advertising receptivity, then, is a tricky thing to measure, for we are not merely talking about product users, but rather those attitudinal gradations (or segments of a category's total user base) who are more or less interested in ads and the information they may convey about the product, including ways to use it, brand extensions or innovations, prices, buying tips, etc. Also at issue is whether ad receptivity's application can significantly improve a TV advertiser's return-on-investment (ROI), were some way found to measure this phenomenon and correlate it with TV viewing preferences.

To explore this question, Next Generation Research, LLC. (NGR)—with the backing of various media companies—developed and conducted a study of 13,357 adults in March 2003. Each respondent returned a 28-page mailed questionnaire that inquired initially about their recent viewing of 225 nationally aired TV shows, then asked about the respondents' use and/or purchase of 189 product categories. When a respondent claimed to use or buy a product category, he was then asked how likely he was to be attentive to ads for that product category when they were encountered (in any medium). A four-point scale was provided, ranging from "very likely" to "very unlikely" as possible answers. "Very likely" was considered to represent those users/buyers who are the most ad receptive for a given category.

On average, only 22% of product users/buyers were found to be ad receptive in the measured product categories. As shown in the first table, ad receptivity in aggregate tended to be higher among women than men product users and skewed towards the lower income segments (findings were relatively flat by age). Taking the upper income group (respondents

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with household incomes of \$75,000+), such consumers were more likely than all adults to use/buy the products/services measured: while the typical product/service was used/bought by 35.8% of all adults, the corresponding figure for those with household incomes of \$75,000+ were 38.3% (or 7% above average). However, only 15% of upper income users/buyers of the average product/service were found to be ad receptive (“very likely to pay attention to ads” for that category), which is 32% below the all-adult norm. In contrast, adults in the lowest income group (<\$30,000) were 9% less likely to be product/category users than all adults, but 31% of them were ad receptive—40% above the all-adult norm. Finally, black product users were considerably more ad receptive than white product users—a finding corroborated by many more general investigations of advertising interest (see first table).

AVERAGE PRODUCT USER/BUYER PENETRATION AND AD RECEPTIVITY RATIO BY SELECT DEMOS FOR 189 PRODUCT/SERVICE CATEGORIES

	% WHO BUY/USE PRODUCT	% OF USERS WHO ARE AD RECEPTIVE
All Adults	35.8	22
Sex		
Men	31.4	19
Women	39.8	24
Occupation		
18–24	31.6	23
25–34	38.4	22
35–54	37.9	20
55+	33.1	23
H.H. Income		
\$75K+	38.3	15
\$50–74.9K	36.9	18
\$30–49.9K	35.2	23
<\$30K	32.7	31
Race		
White	35.5	18
Black	37.1	24

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

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Was advertising receptivity an across-the-board phenomenon? The answer is no; in fact, one of the most significant findings of the 2003 Advertising Receptivity Index was the tremendous variations among product classes. The second table shows some of the highest and lowest categories in terms of ad receptivity. For example, 47% of recent movie-goers stated that they were very likely to be attentive to movie ads, making this the most highly ranked category on the ad receptivity scale. Other high scoring product categories included enjoyable products/services such as cruise line vacations, theme park visits and pre-recorded music, along with products that were personally important to the consumer (home remodeling, smoking cessation products) or those with positive self-image connotations (luxury and sports cars). At the opposite extreme were more mundane products (chewing gum), those with negative auras (brokerage house ads) and ads that have relatively little to say (rum, beer).

EXAMPLES OF PRODUCTS/SERVICES WITH HIGHEST & LOWEST AD RECEPTIVITY¹

HIGHEST		LOWEST	
Movies	47%	Credit Card	12%
Cruiseline Trips	45	Watch	12
Import Sports Cars	42	Rum	14
Rx Arthritis Medications	42	Imported Beer	14
Theme Park	41	Brokerage House	14
Import Luxury Car	41	VCR	15
Smoke Cessation Products	39	Shaving Cream/Gel	15
Rx Asthma Medications	37	CD Player	16
Yeast Infection Remedy	35	Corn/Tortilla Chips	16
Pre-recorded Music	34	Wine	16
Children's Clothes Stores	34	Life Insurance	17
Women's Designer Clothes	34	Disposable Razor	17
Vacation Car Rental	32	Chewing Gum	17
Hair Coloring	31	Canned/Jarred Soup	17
Home Remodeling	29	Bottled Water	18

¹Base: Adult product users.

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

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In order to delineate the importance of ad receptives, the final section in the 2003 Advertising Receptivity Index questionnaire presented a list of 550 brands, organized by product category. Respondents were asked whether they had seen or heard any ads for that brand in the past 30 days (the answer options were “yes,” “no” and “not sure”). The following table shows the critical ad receptivity-to-ad awareness relationship developed by this study. The average all-adult ad awareness level was 33.8% for all brands measured, while among non-product users it fell to 27.5% (19% lower). However, among product users who did not claim they were “very likely to pay attention to ads,” the average ad awareness was 38.6%. Here’s the clincher: among ad receptives (typically 22% of an average category’s user/buyer base), the average brand scored a stunning 54.5% ad awareness—61% above the all-adult norm. This finding validated both the advertising receptivity concept itself and the method used to define it in Next Generation Research, LLC.’s 2003 Advertising Receptivity Index.

AVERAGE BRAND AD AWARENESS AMONG PRODUCT USERS BY AD RECEPTIVITY

(550 Brand Average)

	% AWARE OF BRAND AD	INDEX
All Adults ¹	33.8	100
Non-product Users	27.5	81
Product Users Who Are Not Ad Receptive ²	38.6	114
Ad Receptive Product Users	54.5	161

¹Including non-users.

²Did not claim to be very likely to be attentive to category ads.

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

The 2003 Advertising Receptivity Index also queried respondents about their media usage. How did the various TV network types and program genres perform in targeting ad receptive product users, as opposed to all product users? Before we answer this question, it is important to note how the broadcast networks, syndicators and cable

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services preformed demographically, since this obviously has a bearing on advertising receptivity. As shown in the fourth table, taken in broad dayparts, there were relatively few distinctions between viewers. Blacks were heavily represented in all dayparts, but especially in the daytime hours. Syndication tended to draw higher proportions of women viewers—due primarily to the large number of daytime shows measured. The broadcast networks and cable generated somewhat higher concentrations of upscale viewers with household incomes of \$75,000+ (see fourth table).

DEMOGRAPHIC PROFILE OF AVERAGE TC ADULT VIEWERS BY NETWORK TYPE AND DAYPART

	SEX		AGE		H.H. INCOME		RACE	
	MEN	WOMEN	18-34	55+	<\$30K	\$75K+	WHITE	BLACK
Broadcast Networks								
Early AM News (3)	41%	59%	24%	37%	30%	28%	79%	15%
Daytime (12)	29	71	31	31	45	16	70	26
Early News (3)	47	53	21	41	30	28	80	14
Primetime (113)	45	55	33	28	32	25	78	17
Late Night (9)	56	44	43	20	30	26	78	15
Sun. Political Talk Shows (3)	50	50	17	47	27	33	80	16
All Shows (143)	46	54	31	29	32	26	78	17
Syndication								
Daytime (13)	37	63	31	32	42	17	66	29
Prime Access ¹ (8)	43	57	26	39	36	22	76	19
Weekend Drama (6)	54	46	34	22	41	16	68	24
All Shows (27)	41	59	31	32	39	19	69	25
Cable								
All Show Avg. (55)	47	53	35	25	30	27	78	17
U.S. Pop.	48	52	32	28	27	29	83	12

() Number of shows.

¹Magazine and game shows.

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

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Looked at in the same across-the-board manner, the advertising receptivity findings reveal relatively minor distinctions (with the exception of daytime programs) both on the broadcast networks and in syndication. As shown in the fifth table, these audiences indexed only a few points above the all-population norm in targeting users/buyers of the average product studied, but they were 33% more likely to be ad receptive product users, compared to the all-program averages.

RELATIVE TARGETING INDICES FOR 189 PRODUCTS/ SERVICES BY NETWORK TYPE AND DAYPARTS¹

	NO. OF SHOWS	RELATIVE TARGETING INDEX	
		PRODUCT USERS	AD RECEPTIVE PROD. USERS
Broadcast Networks			
Early AM News/Info.	3	100	92
Daytime	12	102	133
Early News	3	98	92
Primetime	113	99	96
Late Night	9	100	97
Sun. Political Talk Shows	3	100	99
Total Broadcast	143	99	97
Syndication			
Daytime	13	102	132
All Other	14	99	111
Total	27	100	120
Cable			
All Dayparts	55	102	102

This table reads as follows: The average telecast adult daytime audience of the broadcast networks was 33% more likely than all TV viewers across all network types and dayparts to be an "ad receptive product user." In contrast, the same viewers were only 2% more likely to be a product user for the 189 categories surveyed.

¹Base is average TC adult viewers.

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

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Finally, the sixth table compares a number of program genres across all three network types. Here we see greater disparities than were reached by the all-daypart, all-show averages. For example, while the average broadcast network sitcom fell 6% below the overall TV norm in delivering ad receptive adult viewers, cable sitcoms scored 10% above par in this regard. As can be seen, cable dramas also held a strong edge over broadcast network dramas, and syndication's prime access newsmagazines and weekend action/adventure dramas were superior to the broadcast network dramas (see sixth table).

**RELATIVE TARGETING INDICES FOR 189
PRODUCTS/SERVICES BY NETWORK
TYPE AND PROGRAM GENRES¹**

	BROADCAST NETS.	SYNDICATION	CABLE
Product Users			
Sitcoms	99	NM	103
Newsmags.	100	107	—
Dramas	99	100	102
Reality Shows	94	—	107
Newscasts	98	—	100
Ad Receptive Product Users			
Sitcoms	94	NM	110
Newsmags.	101	117	—
Dramas	94	116	108
Reality Shows	102	—	100
Newscasts	92	—	86

NM—Not measured.

¹*Base is average TC adult viewers.*

Source: Next Generation Research, LLC., 2003 Advertising Receptivity Index.

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If one digs deeper into the data and looks at the relative showing of specific networks and finer gradations of program genres, it is evident that advertisers who rely exclusively on network-style “buyergraphics” (chiefly the umbrella 18-49 or 25-54 definitions) aren’t singling out those product users who are more likely to pay attention to their ads. To illustrate this point, the WB network’s primetime fare (at the time of this study) drew little better than the all-TV norm in targeting an average product category’s user/buyer base (101 index); however, the WB’s viewers were 12% more likely than all viewers to be ad receptive product users. In contrast, NBC’s primetime programs were, on average, just as likely to attract product users (100 index) but were 12% less likely than all viewers to be ad receptive. In other words, taking all of the products in aggregate, the WB network’s audience was only of equal value with NBC’s in terms of product usage, but WB viewers were almost 25% better in terms of advertising receptivity.

Did this make a difference? One way to answer this question was afforded by the brand campaign ad awareness phase of NGR’s study. As noted earlier, at the end of the questionnaire, each respondent was quizzed concerning his/her recall of past month exposure to the ad campaigns of 500+ national brands. In view of its edge in ad receptivity, the WB network unsurprisingly delivered 9% higher ad awareness levels than NBC across all brands studied.

We have no illusions about the willingness of the TV networks and agency time buyers to depart from their traditional *modus operandi*, which hinges on audience data and hopelessly broad demographics. Certainly newfangled “qualitative” refinements such as ad receptivity would be regarded as unwelcome complications for what is still a well-oiled and smoothly functioning system. Still, one wonders whether advertisers who expound so eloquently about “accountability” and ROI at industry gabfests will one day band together to demand the development and use of more ad-relevant measures of “audience delivery.” If this miracle ever occurs, ad receptivity is certainly one area they should explore.

