

INTERMEDIA COMPARISONS: DEALING WITH THE “APPLES VS. ORANGES” CONUNDRUM

As we have noted elsewhere in this edition, most media mix decisions are made arbitrarily. The client, with or without any help from the ad agency, simply determines that roughly 60% of his/her dollars will go to primetime TV, 15% to late night TV, 10% to magazines, and so on. Audience studies, CPMs, etc. rarely play a role in such deliberations. Far more important are traditional product and brand category practices, the perceived merchandising values of each medium to the “trade” (sales force, stores, dealers, etc.) and/or the financial analysts and, frankly, the inbred media preferences of the top marketing and agency executives who guide the advertisers’ ongoing “branding” efforts.

This does not mean that a more objective analysis of media audience, cost and ad impact factors should be ignored. Indeed, most advertisers are ill-informed about the potential benefits of alternative media mixes, particularly when relatively newer forms (cable and more recently site-based TV and the Internet) are emerging. In virtually all media plans, this “information gap” is compounded by the absence of any alternative plans to consider. Instead, the typical plan is in fact a collection of separate plans for each of the preferred components, generally without any real intermedia comparisons or an evaluation of synergistic effects. Competitive brand media plans also tend to be excluded in such analyses, except for occasional references to total ad budget levels (e.g. “We’re being outspent by Brand B by 200%, so we are using more cable to increase our frequency.”).

When an advertiser hires a new marketing director, this often inspires something of a shakeup and, in some cases, a brief return to “zero-based” thinking. Suddenly new questions are asked, like, “Why are we spending so much money in primetime TV?” or “What about the Internet?” Invariably, the brand managers and agency account execs can’t answer effectively. So it falls to the agency media planners to come up with satisfying explanations, which usually have to be manufactured, retroactively, since these issues were never raised by prior client marketing administrations or dealt with in their media plans.

At first glance, the media planner who is asked to make an objective review of all of an advertiser’s media options faces an imposing and intimidating task. While lots of data—particularly of the audience and cost efficiency variety—are available, the basic question has always been whether we are comparing apples and oranges when evaluating magazine “reading” vs. TV “viewing” or radio “listening” information. Compounding this are concerns about the audience definitions themselves, their relevance as indicators of ad exposure or impact and, more fundamentally, their inherent accuracy. Can we place equal confidence in the findings of meterized network TV “viewing” studies, radio PPM or diary recollections and magazine “total audience” research conducted via personal interviews based on claimed past week (for weeklies) or past month (for monthlies) reading or “looked into” claims that are not even issue-specific?

Since the starting point of most intermedia comparisons is audience measurement, let’s begin with an overview of the current state of affairs for each medium.

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Network TV

National network TV viewing (broadcast networks, syndication and cable) is measured by Nielsen’s peplemeter panel, which monitors set usage and channel selection on an ongoing basis whenever it occurs, for every receiver per household. Viewing data are provided by each individual via a peplemeter device. Whenever a set is turned on, those who claim to be “viewing” (itself a highly subjective assessment) indicate this status. The system assumes that said viewers continue to watch every moment while the set remains tuned into the same channel, unless they report otherwise. If the channel is changed, viewers are required to reaffirm their viewing status, and periodic prompts are used to stimulate such reaffirmations or to note cessations in viewing.

Although this is a well thought out system, it is obvious that many viewers do not comply, particularly when they leave the room while a show is in progress. And no distinctions are drawn between fully-attentive and less attentive viewing, the effects of distractions, etc. As a result, average minute audience levels are probably overstated by some unknown margin (perhaps 10%). The composition of the panel is also a factor. Are we to assume that people who accept having their sets wired up and agree to the peplemeter recording chore—which may involve thousands of hours of TV exposure across a 12–18 month period—are truly representative of the total population? Or are heavy viewers more likely to cooperate than light viewers, due to their interest in the medium? Here again, the possibility of overstatement is at play.

Spot TV

Unlike national or network TV, local market TV audience surveys are extremely primitive. Because the stations can’t or won’t support bigger respondent bases, most local market surveys utilize relatively miniscule samples. In addition, a variety of research techniques are employed (peplemeters in larger cities, household set meters plus diaries in midsized cities and diaries in smaller markets). There are many questions about sample selection, ethnic balancing and data reporting in these studies that remain unanswered.

Radio

For four decades the accepted audience measurement “currency” for radio was the telephone-placed, one-week personal diary used primarily by Arbitron, which has long been plagued by declining cooperation rates. More recently, Arbitron’s electronic Personal People Meter (PPM) indicated that diaries overstate radio listening by 25-30% due to the nature of their respondents (too many heavy listeners in the sample) and the way they fill out their diaries (too many end of week, general practice reports citing a few favorite stations, but omitting exposure to other outlets). The PPMs also revealed that diary-based reach and frequency projections are highly questionable. Typically the PPMs indicate much greater reach levels per station, but significantly reduced frequency of listening rates.

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Magazines

When syndicated total audience surveys were initiated for magazines in the early-1960s, all measurements were for specific issues and respondents were shown actual (or trimmed down) copies, minus ads or recurring features, to remind them of their exposure. Because such “through-the-book” studies were expensive and could not accommodate more than 75 or so publications per interview, cheaper methodologies evolved that could measure hundreds of publications. These took two forms. In the “recent reading” method, a personal interviewer asks the respondent whether or not s/he has read or looked into any issues of 300+ publications in the past six months, and then asks questions about the magazines s/he claims to have read by issue cycle groupings. For weeklies, the question is usually along the lines of, “Have you read or looked into any issue of Magazine X in the past week?” For bi-weeklies, the time frame is lengthened to two weeks, for monthlies to the past month, etc. The assumption (never validated) is that claimed past week any-issue readers of a weekly are the equivalent of its average issue audience, with the same concept applied to past two weeks and past month reading claims for bi-weeklies and monthlies.

The other method uses reading frequency claims to produce its findings and is usually executed via a questionnaire filled out by the respondent. The respondent is provided with a list of publications, often arranged by issue cycle, and a two-step process ensues. First the respondent notes whether s/he read or looked into any copy of the publication in the past six months. If the answer is yes, the second step asks the respondent how many of the past four issues of the publication were read. The results are weighted to produce an average audience projection. Those who claim to have seen all four of the past four issues get a weight of 1.00, those claiming three out of four are counted at .75, etc. Publishers love the recent reading and frequency of reading methods for two reasons: first, many smaller circulation, selectively targeted books can be measured and second, the resulting average issue audience estimates are 40–100% higher than those produced by the old issue-specific, through-the-book research.

But are these findings valid? And more to the point, can a readership estimate for an entire issue—not any individual section or page—be compared with an *average minute* network TV viewing report or an *average quarter-hour* radio listener tally? Is “reading/looking into” a magazine the equivalent of “viewing” a TV show or “listening” to a radio station?

Newspapers

Newspaper audience researchers have traditionally asked samples of respondents whether or not they read particular newspapers “yesterday,” with the assumption that this always referred to yesterday’s issue. While this practice continues, there is the suspicion that some of yesterday’s readers may in fact be referring to older issues, or perhaps may be indirectly counting Internet exposures on the paper’s website. Also, as with magazines, few studies provide section-by-section readership claims, let alone page traffic data.

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The Internet

In theory, websites or portals keep track of user traffic electronically, offering a nearly perfect “rating” measurement. However, most sites measure PCs’ visits to their sites and are unable to distinguish unique from repeat visits by individual users. Thus “discrepancies” frequently occur between site traffic data and the results produced by independent Internet “rating” companies which obtain data from panels of cooperating respondents. All of this raises questions concerning the accuracy of Internet audience measurement and, more fundamentally, its significance in intermedia comparisons. Is a page visit, which may last a few seconds or perhaps a minute or two, the equivalent of a one-minute “viewing” occasion for TV, a quarter-hour of radio “listening” and an average issue “reading/looking” occasion for magazines?

As our discussion of audience measurement issues reveals, proponents of the “apples versus oranges” argument against intermedia comparisons have a strong case. Moreover, the ad agencies have largely relinquished their traditional role as validation watchdogs, enabling the media—who are the primary funders of the audience studies—to pressure the research firms to present them in the most favorable light. This has led to bigger audience numbers and greater data availability (more magazines measured, more cable channels included, more marketing information), rather than “nitpicky” considerations about overburdened survey respondents, representative samples and fair editing rules. At best, the syndicated studies may be valid *intramedia* buying tools, but in their “raw” form they certainly are *not* comparable across media, particularly where advertising impact is concerned.

So what does the media planner do about this? Our suggestion is to explore the numerous *qualitative* indicators that *are* available, and make reasonable adjustments to the data so intermedia comparisons *can* be made on a more valid basis.

To begin with, let’s take the critical distinction between program or editorial content and ad exposure. None of the media-driven syndicated audience surveys provides anything approaching a pure indicator of ad exposure, but there are clues that can be mined to get a handle on this issue.

When Nielsen reports that a given network one-hour TV telecast reaches so many adults per minute, it is now possible to segregate program content sequences from those involving commercials. Typically, commercial ratings are lower due to viewer “avoidance” via dial switching, tune-out or delayed DVR viewers who fast forward through ads. Not surprisingly, there are significant variations in audience loss during commercials depending on program genres, dayparts, demographics and network type. Dial switching avoidance can be as low as 1–2% or as high as 25–30%, depending on which of these variables (or combinations thereof) is at play.

In general, cable channels feature more dial switching during commercials than the broadcast networks, while syndicated shows seem the least effected by this phenomenon. Demographically, young adults, especially males and teens, are more inclined than older audiences to dial switch during ads. Finally, daytime programs display greater holding power ratios than primetime entries (for more on all of these distinctions, see our annual **TV Dimensions**).

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Over and above electronic zapping actions, the largest detriment to TV commercial exposures occurs when viewers who stay tuned to the program during a break leave the room or lapse into total or partial inattention. The best estimates, based on numerous recall and behavioral research (camera or secret “spy” observational studies) indicate that, on average, only 30–35% of the reported audience is actually present and fully attentive during a typical TV commercial, while another 25–30% is present and at least partially attentive. The remainder consists of those who tuned out or to a different channel, zapped the ad via fast forwarding or editing out avoidance, left the room or became totally distracted. Our estimate is that commercial exposure rates—in the sense that a viewer actually notes an ad message and absorbs some or all of its content—probably amounts to only 50–60% of the reported program “audience,” just prior to a break.

Unfortunately there is much less information on this subject for print media, radio or the Internet, but the gap can be filled to some extent with a variety of attentiveness, page exposure and ad recall studies. In the case of radio, Arbitron’s electronic PPM measurements tell us that dial switching avoidance during radio commercials is about one-third higher than the TV norm, which is consistent with the medium’s generally lower fully-attentive exposure ratio (about 50-60% for a typical TV show vs. 25–30% for radio). One can therefore conclude that an average radio commercial is probably noted by a lower percentage of the program audience than is the case with television.

Newspapers provide relatively little information about page traffic and ad recall but the conventional wisdom is that newspaper ads, while less likely to stand out in cluttered page formats than their magazine counterparts, cater to smaller bases of consumers who are already convinced to buy and are looking for actionable information. In contrast, magazine readers are probably the most ad receptive of all media audiences; ad recall studies consistently show that about 50% of an issue’s claimed readers will contend that they noted a typical page four-color ad.

What does all of this tell us? Are intermedia comparisons possible? If so, are they valid? Our answer is yes, but only if ad exposure factors are considered, and the basic limitations of the audience surveys—including their inflationary tendencies—are kept in mind.

All too often, media planners focus on calculating CPMs when evaluating alternative options, but the most fundamental issues in media selection far transcend such one dimensional criteria. Depending on the specific nature of the ad or promotional campaign, the planner must develop goals (such as creating certain levels of ad awareness or associating the client’s brand with “environmentally compatible” media) to produce a synergistic, image-enhancing effect that rubs off positively on its behalf. Often, consumers aren’t the only targets; of equal, or at least significant importance are the reactions of the advertiser’s distribution organization, the retail outlets, chains or franchises that sell his/her product to the public, the “trade” in general, and the views of other players such as Wall Street analysts or government regulators/legislators who will be exposed to the ads. Such considerations may dictate a significant ad presence in broadcast network TV newscasts, political talk shows or major sporting events, no matter what the CPMs are. Similarly, certain magazines may get schedules primarily because of their standing among the trade and other non-consumer constituencies, rather than the kinds of readers they attract and the attendant cost efficiencies.

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In all cases, the planner's deliberations should be made in the context of advertising impact. For example, if an ad message is attention-getting and motivating, and the product is one with strong personal relevance for consumers (a car or a fashion product, as opposed to much less interesting commodities like toilet bowl cleaners or detergents), this may lead to certain decisions about continuity or flighted scheduling, the types of media or media environments that are more suitable image-wise and so on. On the other hand, if the ad message is a fairly technical proposition with a number of facts or some degree of learning involved, an entirely different media mix may be appropriate, and repetitive "impact" scheduling, perhaps in flights, may be preferable to an ongoing "continuity" campaign.

No matter what marketing or communications aspects are involved, the critical need is to be able to view any medium, or subset thereof, as an integrated component of the total advertising/promotion plan. With this in mind, each medium is given certain primary and secondary tasks to perform and often these are laid out in a sequential pattern. For example, the classic job of a network TV and/or magazine ad campaign is to introduce a new product to the public in a big way, while other media offer selective targeting, supporting detail/information and, in the case of the Internet, a convenient and instantaneous direct response function for motivated consumers homing in on (or actually making) a purchase.

Like many of the white papers we publish, our purpose is to stimulate our readers' thought processes, not to present hard and fast rules and rigid statistical formulations. Elsewhere in this volume, readers will find many data tables regarding CPMs, demographics, ad exposure, ad recall, timing and other factors, but all of this information must be considered in a client-specific marketing context. The answers to all media mix or intermedia questions rest in the way they interact or complement each other. Also key is the planner's ability to mix and match media in accordance with the consumer's needs and response mechanisms. Once we understand the consumer's decision-making process and appreciate the positive response a proposed ad campaign can elicit, the best media mix often becomes obvious, without detailed statistical machinations or hand wringing over "apples versus oranges" issues.