MDI ALERT

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HOW TV'S AD IMPACT HAS CHANGED

It has been a long time coming, but there finally seems to be a consensus within the media industry that TV "audience" surveys do not reflect the medium's ability to capture and hold viewers' attention. In light of this, we thought it would be interesting to compare the average ad exposure situation for TV as it existed in 1955, 1995 and today, with streaming now an important part of the picture.

EARLY DAYS OF HIGH AD EXPOSURE AND LITTLE AVOIDANCE

In 1955, the TV networks dominated the TV scene, and most homes had a single set WITH no remote to make dial switching easy and no way to record shows for later viewing. Back then a typical in-show break in a primetime program featured only a single 60-second commercial, often presented by the star of the show. While other dayparts had more messages, they still mostly featured :60s and station breaks with a 10- and 20-second ad message. So, typically, a program viewer who encountered a break—or "a word from our sponsor"—wasn't barraged with a long string of ad messages.

Commercial avoidance was fairly low under such advertiser-friendly circumstances. A large portion of the program audience watched all or part of a commercial, with only a few viewers leaving the room or engaging in distracting activities like chatting with another viewer or looking at a magazine. Ad recall studies conducted by telephone a day after exposure reported that 20% remembered seeing an average commercial without any prompting; aided recall boosted the total to about 45%, with many ad messages exceeding these norms. The early recall studies also measured viewer response and found intent-to-buy lifts of about 7-9%, meaning that those viewers seemed more favorably inclined towards the advertised brand immediately after seeing one of its commercials.

SHORTER AD LENGTHS DOUBLE COMMERCIAL CLUTTER

But this ad-friendly situation gradually changed.

Advertisers diminished the impact of their commercials when they switched their basic ad length to :30s in the middle- and late-1960s and later adopted :15s in the 1990s, in both cases to counter rising CPMs demanded by the TV networks. Because recall studies found that the shorter messages garnered about 65-70% of the recall of the longer ones at half the cost, the shorter units seemed to many TV advertisers like a cost efficient way to maximize ad exposures. It never occurred to them that they were doubling the commercial clutter in most of their ad breaks or that ad recall did not automatically equate with selling power. As a result, commercial attentiveness declined and unaided ad recall levels fell to nearly zero.

THE DECLINE OF TV'S AD IMPACT

Fast forward to today and it's clear that TV's ad impact has continued to decline. This is a natural result of the increased use of shorter ad units (more :15s), increased ad clutter, the use of DVRs to zap commercials, and more distractions while watching, like using smartphones. According to observational studies that actually monitor whether the program viewers are present in the room as well as whether they are watching the screen on a second-by-second basis, only half of those who were present just before a commercial break watches an average ad message for at least two seconds. And these commercial viewers have their eyes on-screen an average of only 10 seconds. Compare these stats to prior norms and it's evident that today's brands have much less time to tell a smaller portion of the program audience what they want to say about themselves.

Recent ad impact studies support this assessment. As noted, in the distant past, with much longer commercials and fewer competing messages sharing the break, between 7-9% of the program viewers became more interested in the advertised brand than was the case before seeing its ad message; this is often referred to as a "sales lift." From what we can determine, the corresponding stat today, if measured in the same manner, would be less than half as high.

REACHING CONSUMERS MEANS USING ALL MEDIA PLATFORMS

This does not mean that TV is no longer an effective advertising medium. All forms of advertising and media are affected by the changes in modes of communication and the ensuing fragmentation that is taking place. And the amount of ad clutter is rising in all media, not just TV, with similar effects on ad impact. Also, no brand relies on a single ad exposure in a single TV show to get its message across to a large number of targeted consumers. Instead, their ad campaigns involve many ad placements on many networks and media platforms that, over time, generate a fair degree of ad message reach and repeat frequency to sustain the promotional effort's momentum. The difference is that it takes a lot longer to garner the brand's desired message awareness levels and if you rely too heavily on a single platform—be it TV or some other medium—you can't attain the maximum reach levels that might be obtained with a different media mix.

The message for advertisers is clear: if TV remains your choice as the most effective way to get your message across, there are new ways to target consumer segments in TV that must be explored. Those who fail to consider these emerging new options do so at the peril of their TV ad campaigns.

The accompanying table presents the statistical comparisons we have referred to in this article.

HOW THE AVERAGE PRIMETIME TV COMMERCIAL'S AD EXPOSURE AND IMPACT CHANGED OVER TIME

	1955	1995	2025
No. Of Comml's. Per Break	1	4-6	7-9
Comm'ls. By Length			
:60	1	--	--
:30	--	4-5	4
:15	--	1-2	4
Average Comm'.l Length (Secs.)	60	28	22
% Viewer Attentiveness[1]			
Not In Room	10	15	25
In Room/Not Watching	25	30	25
In Room/Watch Comm'l.	65	55	50
Average Dwell Time (Secs.)	26	14	10
% Recall[2]			
Unaided	20	2	--
Aided	45	35	25
% Purchase Intent Lift	+7-9	+5-7	+3-5

[1]*View 2+ seconds.*
[2]*With some degree of content playback.*

Source: Media Dynamics, Inc.

Media Dynamics, Inc. (MDI) is a media publishing and consulting company that provides customers with weekly **Alert** reports of our expert take on new developments; ad impact; media research; planning, buying and selling; plus exclusive estimates on important subjects like the pros and cons of attentiveness measurements or what constitutes the ideal TV rating service.

We also provide in-depth annual reports on all aspects of TV, including its audience, ad and other revenues, cross platform comparisons, as well as consumer profiles, CPM trends, and upfront ad spend and CPMs.

On the consulting front, we aid media sellers in positioning their values to buyers and help advertisers in evaluating agency media performance. We also guide companies trying to enter the media measurement business.

If you would like to know more about how **MDI** can help you, contact us at 973-542-8188 or info@mediadynamicsinc.com.