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Author Samantha Paech, Erica Riebe and Byron Sharp

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WHAT DO PEOPLE DO IN THE ADVERTISEMENT BREAKS?

Samantha Paech, Erica Riebe and Byron Sharp
University of South Australia

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Abstract

The difference between television programme audience versus advertisement audience size and behaviour has, and continues to be, a matter of much controversy. Whilst media planners and advertisers readily accept that commercial audiences are smaller than programme audiences, no generalisable guideline exists to determine the size of the actual advertisement break viewing audience. At present, media planners and advertisers choose advertising space based upon programme ratings, which indicate the 'opportunity to see' an advertisement when placed within a particular programme. However viewers bring varying levels of attention and involvement to the television set, actively and passively diverting their attention away from both programming and advertising. In turn advertisers cannot be certain that their advertisement was in fact seen, nor the proportion of the audience actually viewing their advertisement. In examining the existing literature in this area we find that firstly actual programme viewing is less than 'opportunities to see' would indicate. Secondly, and of more interest to advertisers, the literature reveals that approximately one third of the 'opportunity to see' audience for a particular programme actively views the commercials breaks. This thereby provides an ad viewing benchmark (empirical generalisation) from which media planners and advertisers can more accurately measure actual rather than potential advertising exposure and the subsequent impact of their ad placement choices.

Introduction

Television is a substantial medium for advertisers. In 2000, television accounted for 39 percent of advertising spend, or US\$51 billion in the US, 32 percent or £3.9 billion in the UK (WARC, 2002) whilst in Australia television advertising spend is expected to exceed AUD\$2.8 billion in 2003 (Brook, 2003). However, whilst television advertising spend is significant, literature in the area reveals that less time is devoted to television viewing. Additionally, the advent of remote controls, fragmentation of TV channels and increase in the size and number of ad slots has resulted in viewers increasingly paying even less attention to the commercials (Beal 2002). Consequently, effective media placement decisions are becoming more important than ever before.

The goal for any advertiser is to get the best value for their advertising dollar by placing their advertisement in such a way as to effectively reach the maximum possible proportion of the potential viewing audience. Television advertisement placement decisions are based on programme audience viewing data (i.e. the ratings

as measured by the peplemeter¹), which provides the currency by which airtime is traded, and the method by which the value of different advertisement slots are compared. From this reach and frequency goals are set. In general, the higher the rating (i.e. the larger the number of viewers with an 'opportunity to see' a particular programme), the higher the cost of the advertisement space during that time (Lloyd and Clancy 1991). However the ratings only deliver vehicle exposure, i.e. a probability that an individual will look at a television programme containing a particular advertisement (McDonald 1996). An individual therefore has an 'opportunity to see' the commercial but it is still not possible to say with any certainty that the ad was actually seen. Yet, from an advertiser's point of view, it is the actual ad viewing which is important.

Whilst media planners and advertisers readily accept that commercial audiences are smaller than programme audiences, no generalisable guideline exists by which they can determine the size of the television audience actually viewing their commercials. In this paper we examine the behaviour of viewers both during programmes and advertisement breaks based on a literature review of the area, with the aim of differentiating between 'opportunities to see' and actual viewing to determine an advertisement viewing benchmark (empirical generalisation). We find that one third of the 'opportunity to see' audience for a particular programme actively views the commercial breaks. Such distinction is necessary to provide a more accurate measure of advertising exposure. In turn, a more accurate benchmark allows advertisers and media planners to set realistic objectives and make media placement decisions based on actual reach rather than simply 'opportunities to see'.

Methodology

We examined the research literature on topics such as TV viewing and non-viewing, ratings, and advertising avoidance to determine the proportion of the audience who could be classified as 'actively watching' or 'actively avoiding' the advertisements. The aim was to compare the actual level of viewing with the "opportunity to see" to gain a better idea of the actual size of the viewing audience.

Due to the aims of the study, the literature that was chosen for this analysis needed to provide an indication of the proportion of the researcher's sample who could be identified as having 'actively viewed' or 'actively avoided' the commercial. Therefore, studies that looked only at programme-level conclusions or merely presented aggregate level data were excluded from this analysis, as it was not possible to determine proportions of the audience who would actively watch or avoid the ads from this research.

¹ The peplemeter consists of a recording unit which sits on the TV set and a remote control handset with numbered buttons, each of which is allocated to a member of the household. Participants use these handsets to "login" each time they begin watching TV and "logout" whenever they leave the room. The unit also records any channel changes whilst people are logged in (McDonald 1996)

Findings from the literature

In spite of radically different methods, different sampling, time and countries, results show remarkable consistency (given the range of conditions).

Direct observation (Allen, 1965; Steiner, 1966; Moriarty and Everett, 1994; Krugman, Cameron and White 1995; Bechtel, Achelpohl and Akins 1972; Zwaga 1992; Brennan and Syn 2001 and Ritson 2003), self reported viewing behaviour (Nutall 1965); Rich, Owens and Ellenbogen 1978; Lynch 1999; Esselmont and McLeay 1993 and Hallward 2000) and ratings data (Ehrenberg and Twyman 1967; Danaher 1995 and Van Merus 1998) have all been used by researchers to determine what viewers do during programmes and commercial breaks.

Firstly, studies have shown that a significant proportion of people are absent from the room whilst the television set is switched on. Allen (1965) used time lapse cameras which unobtrusively recorded viewing behaviour by the minute in 95 homes (or 358 residents) to find that, for an average of 19% of the 'set in use time', advertisements had no viewers in the room. Similarly, Ehrenberg and Twyman (1967) summarised five years of British television ratings data to find that between 15% and 20% of programme viewers are not present when the television is on. Some 30 years later, Brennan and Syn (2001) used in-home video recordings of 18 households in New Zealand, over a period of 8 days to similarly find approximately 15% of viewers absent whilst the TV set is on.

Even when present, viewers bring varying levels of attention and involvement to the set, and viewing often takes place in the company of other activities. Lynch (1999) reported a telephone study conducted for a leading television network in Germany with a sample of 1,014 respondents in which 80% of viewers claimed they did other activities whilst watching television. In a study conducted by Statistical Research Inc in the US, viewers described only 42% of their viewing occasions as paying full attention to the TV (Swallen 2000). Krugman, Cameron and White (1995) examined 64 subjects' 'eyes-on-screen' time using in-home observers for a period of one hour to conclude that viewers were "visually orientated to programming" only 62% of the time, a finding closely aligned with Allen (1965) (who indicated this percentage to be 60%) and Bechtel, Achelpohl and Akins (1972) (who found that 65 % of the 96 subjects' videotaped in their home, were actually watching the advertisements when they were played).

From the literature, it would seem that ratings measures fail to take account of people absent from the viewing room and/or not actively watching the programme thereby overestimating the size of the actual programme viewing audience. However, more importantly for advertisers, the literature also reveals that ratings data excludes the impact of viewers not viewing the advertisements.

Several studies have shown that more often than not, television ad breaks act as a trigger for viewers to conduct a spectrum of other activities. These activities range from what can be described as complementary activities, such as eating, drinking, conversations about the programme or commercial, to competing activities which include, for example, talking, reading or household chores (Krugman et al 1995). Participating in such activities, particularly those that compete for a viewers'

attention, lowers visual attention to both programmes and commercials alike. But to what extent do television audiences watch or avoid commercials?

Reconciling the methods and results

1/3rd of the 'opportunity to see' audience is 'actively watching' the commercials.

Studies conducted in the 1960s and early 1970s, reported that approximately half of the total viewing audience attentively watched commercials. Allen (1965) and Bechtel et al (1972) found that subjects watched commercials approximately 50% of the time. Steiner (1966) employed the use of college students to observe a family member's viewing behaviour (183 valid observations) followed by a post exposure interview to find that 47% of the total audience watched *all or almost all* of the commercial break. However, in comparison to these studies, Ehrenberg and Twyman (1967) revealed that on average only between 30-40% of the audience *engaged in no other activity* other than viewing the television set.

More recent work has concluded that the proportion 'actively watching' commercials is closer to 30%, in line with Ehrenberg and Twyman's 1967 study. Krugman, et al (1995) found that commercials were only watched 33% of the time. This finding correlates closely with the results of a day after telephone study conducted by Lynch (1999) who found that 35% of viewers reportedly *watched and paid attention* to the advertisements within the programme.

The decline in the proportion of viewers 'actively watching' commercials may be related to considerable change in the viewing environment over the past thirty years. For example, the introduction of the remote control and VCR to allow for "zapping" of the commercial breaks. In addition, fragmentation of the television industry has given viewers more control over what they watch and has increased choice in the type and number of channels and programmes available (Heeter and Greenberg 1985; Yorke and Kitchen 1985 and Hallward, 2000). This combination of technological advances has given rise to a relatively new phenomenon in viewing behaviour, "channel grazing" whereby viewers watch several programmes during any one time period, and commercial breaks provide the perfect opportunity for such viewers to switch between channels (Lloyd and Clancy 1991). Television has also become less of a novelty and social change has led to people spending less time to view television let alone the commercials. For these reasons, we suggest that a more realistic estimate is that 30% of those with an 'opportunity to see' actually 'actively watch' the advertisement in today's television environment.

1/3rd of the 'opportunity to see' audience is 'actively avoiding' the commercials.

So given that, one third of the audience is 'actively watching' the commercials, what are the remaining two thirds of the audience doing? There is a literature devoted to studying active avoidance of advertising. This avoidance can be divided into two major areas: channel switching (i.e. zapping) and leaving the room. Studies by Allen (1965) and Anderson (1985) who both videotaped home viewing behaviour, found that around 40% of viewers of the programme actually left the room when the commercials were being aired inevitably missing some, if not all the commercial

breaks during a particular programme. A later study by Van Merus (1998) of 5 network stations over a 4 month period in the Netherlands revealed that around 29% 'actively avoid' commercials by either leaving the room or channel switching. Likewise Lynch (1999) found that 16% of all programme viewers in the study left the room during commercial breaks whilst 14% switched to other channels accounting for a total of 30% of the commercial break audience actively avoiding the advertisements.

In a review of previous research, Abernethy (1991) summarised several leading studies of viewing behaviour to derive an average television commercial avoidance rate of 32% composed of 22% leaving the room and another 10% to channel switching. The studies reviewed in this paper support the findings of Abernethy with approximately 30% of the audience "actively avoiding" commercials.

1/3rd of the 'opportunity to see' audience is 'passively viewing' or 'passively avoiding' the commercials.

While some authors show that a significant proportion of 'opportunities to see' are actually people actively avoiding the commercials, what Abernethy (and other researchers in this area) fail to comment on, is those people who do not 'actively watch' or 'actively avoid'. That is, if one third of the audience is 'actively watching' and one third is 'actively avoiding' the commercials, one third of the television commercial audience is still unaccounted for.

This remaining third may be paying varying amounts of attention to television programmes and commercials. These factors of momentary absence or presence of attention are clearly important in assessing the audience actually reached by advertisements. Research has suggested that approximately 37% of programme viewers paid only partial attention to the ads (Steiner 1966). Other studies have shown that a large proportion of the potential viewer base are conducting a range of competing activities such as reading, talking or household chores (Lynch 1999; Ehrenberg and Twyman 1967 and Ritson 2003). Lynch (1999) found that up to 20% of the audience turned their attention away from the screen to talk with others in the room, whilst a recent controversial study by Ritson (2003), in which the viewing behaviour of 6 households was recorded with a video camera, found that viewers conducted a range of activities not always conducive to watching television, even if they were in the room when the set was on and did not change the channel.

Krugman (2000), Krugman, et al (1995) and McDonald (1996) have suggested that viewers who may not be 'actively watching' the commercial, may still be exposed to the advertisement and/or paying some attention to the content of advertisements. Whether or not the advertisement gains something from viewers who are not attentive is still an empirical question, however, this paper has shown that at least two thirds of the commercial viewing audience is not 'actively watching' advertisements. This has a dramatic impact upon the size of the viewing audience if that audience is presumed to be the same size as the audience with an 'opportunity to see'.

Conclusions

In this paper, it has been proposed that people with an ‘opportunity to see’ actually differ in their level of watching advertisement breaks with one third of programme viewers actively viewing the commercials. Television programme and commercial viewing can be placed on an active-passive continuum whereby viewers tune in and out of programming and the commercials within those programmes. Whilst our results support Abernethy’s (1990) conclusions regarding a 32% advertising avoidance norm, the conclusions from this paper suggest that approximately half of the remaining viewing audience (68%) exposed to commercials, i.e. 34%, do not actively view the commercials. So whilst television viewers actively and passively *watch* programmes we suggest that they actively and passively *avoid* the advertisements. In turn, media planners and advertisers need to measure the effectiveness of their advertisement placement by capturing the size of the actual viewing audience, rather than the ‘opportunity to see’ audience, which, given the findings of research discussed in this paper, will naturally be far larger.

Future Research

Whilst beyond the scope of this paper a suggested area for future research would be to determine the number of airings needed to guarantee a certain percentage of the potential audience actually seeing the advertisement. For example, if we suppose that there is a one third probability that any one ad is actually seen then the probability that an ad is avoided (either actively or passively) is two thirds. The probability that all of k ads are avoided is $(2/3)^k$. Therefore, in order for someone to have a 90% chance of seeing the ad, we have $(2/3)^k < 1-0.9$, which gives a k of 5.7. Hence even though any single airing of an advertisement may only be actively viewed by one third of the available audience, as the number of repetitions increases so too does the probability that everyone in the viewing audience is reached at least once.

We should also ask ourselves how these varying levels of attention affect the effectiveness of the placement of advertisements within the television medium. For example, does this pattern of 1/3rd actively watching, 1/3rd actively avoiding, 1/3rd passively watching/avoiding generalise to different channels, different types of programs or programs with different ratings? With the advent of pay to view television, there may be less channel surfing because of the lack of commercials. On the other hand, there may be more switching because other viewing options are available. It may be that programs with better ratings have more ‘active watching’ of advertisements than other programs because people do not want to switch channel for fear of missing the program.

These are all empirical questions that should be the focus of future research in this field to gain an accurate measure of the size of the viewing audience for advertisements and to gauge the effectiveness of advertisement placement decisions.

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