

a research perspective

is media planning keeping up with the pace?

Andrew McIntosh



Are the opportunities of today's brave new television landscape being fully exploited by media planners? Television's recent changes bode well for the rehabilitation of drip advertising, but it needs an image overhaul (not to mention a new name) to take its rightful place amongst planners' preferred techniques

At first glance the planning of television advertising is based on logical processes: strategic rationale, commercial reasoning and economic imperatives. It is only when the quirks of the market are investigated that aspects are uncovered which cannot be explained by cold analysis alone and factors like personal relationships, history and emotions reveal their hidden influence. This is to be expected – people, not spreadsheets, create the market - but it makes things trickier when it comes to proposing that the industry re-evaluates something for logical reasons, which presupposes that logic was foremost in the first instance. I'd therefore like to start from an emotional perspective, and work backwards towards the utterly rational.

Drip advertising: if it had a better name it would be used so much more. Of which more later.

how advertising works in the new TV environment

Although this is a call to media planners, the underlying issue is even more fundamental than media planning: it's about how we think advertising works, or, more precisely, how advertising works in the new TV environment.

The phasing of television campaigns is the issue in contention. The classic view is to run periodic bursts of advertising. This 'burst' view dates from the 1960s and 1970s when the defining characteristic of TV was the

existence of one single, enormous commercial channel. Advertising was seen as very powerful. A campaign could move its target audience from indifference to positive action if you could just hit them enough times over a short period. But in a sense, advertising was weak as well. Brands needed – and received – the support of TVR levels three or four times greater than today's straitened norms. Brands had more heavily-advertised competition. Because of this and the need to engage the fallow minds of 'housewives' (nearly always the target back then), 'cut through' had to be achieved both against the target audience and relative to competing brands.¹

the 'science bit'

Today's best planning tools are single source: they collect sales data and media exposure data from the same people. In the late 1990s TNS ran TVSpan, placing TV set meters in the homes of Superpanel respondents. The proximity of exposure to TV ads and the subsequent sales of advertised brands could be monitored. Among TNS' major conclusions were that much short-term effect is achieved by exposures seen within three days of purchase, and concentrated exposure immediately prior to purchase produced significantly greater results on respondents' purchasing patterns. These findings are typical of those contributing to

a more recent orthodoxy. Alongside effective frequency and subsequent bursting, we now have 'recency'.

Today when analysts look at TVSpan – or Nielsen in the US – they conclude, like the advertising academic John Philip Jones, that "a single exposure in the seven days before purchase has far greater effect than what is added by further exposures".² All the good things happen dramatically and immediately after the first exposure, with diminishing returns setting in immediately. If advertising is more of a reminder to purchase than a bludgeon, then awareness of the advertising decays rapidly. In the US, I am told, the new mantra is to ensure as many possible target consumers are reminded in as many weeks, months or purchasing intervals as possible. I urge planners in the UK to reconsider the merits of this approach for their brands; the new TV environment is well suited to it.

the new multichannel consumer

The issue is about media planning and how advertising works. It's also about today's consumers and how they watch TV. The new media environment enables a far wider range of techniques than was ever possible before. For instance, active and aware consumers are happy to be reminded of available brands and products when they are in the market for them, but

change in practice is media planning keeping up with the pace?

they do not necessarily wish to be assailed by heavyweight campaigns. Such active consumers are more numerous in multichannel homes. To take a parochial but highly relevant example, six out of ten regular UKTV Food viewers like trying out new food brands, way above the average, while half of them buy new products because they've just seen them on TV (source: TNS MediaSpan).



burst vs drip

When the patterns used by TV advertisers are observed it quickly becomes apparent that bursts are overwhelmingly prevalent – in other words, a large proportion of advertising campaigns are broadcast over just a few weeks, interspersed with long stretches when the brands are not on-air. On the basis that most businesses operate around the clock throughout the year, one would expect a desire to be regularly communicating with the target audience to dominate and for drip advertising to be the

default, all things being equal. But whatever the internal debates – and however much the timing is interrogated – the outcome, more often than not, is a burst pattern.

The emotional reason why drip advertising is not the default is presumably because a drip is such a pathetic-sounding choice. Who in their right mind when faced with the broad alternatives of a big, explosive burst or a puny inconsequential drip is going to choose the latter? Very few, it transpires. Drips are undesirable, weak and indecisive. Drips need mending, like a dripping tap. Drips are administered to the unwell. Listening to a drip is only one remove from Chinese water torture. Drips run down your ice-cream cone and onto your shorts, form at the end of your nose in cold weather, and need to be wiped up from clean surfaces.

Bursts, on the other hand, are fantastic. Full of energy, exciting and explosive, if something bursts you're going to know about it – whether it's a balloon, a dam or even your appendix. Burst is such a pleasing and positive word that brands contain it as part of their name, like Fruit Burst and Starburst. Bursting with happiness, bursting to tell you something and bursting into laughter are all very positive conditions to be in. In a decisive

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change in practice is media planning keeping up with the pace?

industry where much of the terminology is action-orientated, 'drip' just doesn't cut it alongside energetic terms such as 'campaign' and 'strike rate'. I propose that the term 'sustained' be used forevermore as an alternative to the wet lettuce that is 'dripping'.

advertising: passing fad or constant food source?

Semantics aside, it seems odd that TV airtime is so frequently scheduled in bursts rather than laid down over longer periods as a year-round boost to business. Surely the default position from which one would shift only under duress is for advertising to be a constant food source equivalent to a continual supply of oxygenated blood to a brand's muscles?

To test this hypothesis to your own satisfaction, ask yourself a seemingly ridiculous question. If your brand alone could advertise for free whilst all others still had to pay (in other words, if current conditions for your competitors were preserved) what would your media plans be? There are an infinite number of answers but you would presumably seek frequent contact with your brand's actual and potential customers throughout the year. The flip side of the coin is that given the freedom, to choose advertising in short bursts only two or three times a year would seem unduly reticent.

Whole books exist on the subject of when it is best to advertise. The conventional premise is that advertising is a scarce and expensive option that therefore requires a timing decision, and few marketers are deemed likely to have the financial ability to advertise throughout the year. Yet such assumptions are being rapidly undermined

by changes in the TV market.

A more subtle influence underpinning burst advertising is academic and consultative work. Learned people earnestly try to find absolute truths regarding the ideal number of times someone should see a TV ad – within a burst – in order for it to affect their behaviour, shift their perceptions or simply to buy the product in question. It is a comparative rarity amongst those engaged in the quest for optimal frequency to look at the effect of sustained advertising.

multichannel TV: challenging established thinking

The reason for highlighting sustained advertising as a candidate for rehabilitation is that the TV market has changed in a way that greatly favours using it. TV is a much more flexible medium now that there are many more channels. Directly relevant programmes and channels exist for many advertisers and brands. Television buying audiences have been teased apart by multichannel TV stations and can therefore now be reached cost-effectively. Desirable sub-demographics, notably ABC1s and the under-44s, are disproportionately represented in multichannel homes. Core target audiences – for example, heavy product users and big spending consumers – are also highly likely to be

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over-represented in multichannel homes. Smaller spots allow greater control. Commercial opportunities on satellite and cable channels are more varied and more flexible than ever.

obstacles to change

It is inconceivable that media strategists, planners and buyers collectively could have overlooked how much TV has changed. Therefore, other factors must have caused media planning experts to retain timeworn practices, and the reasons why these remain dominant are worth exploring.

This argument is not intended to question all buying in bursts, rather it questions the orthodoxy and automatic assumptions behind burst buying. There are patently many good reasons to buy in bursts. These include supporting predicted sales surges or requiring them for cash flow; seasonality; promotional support; or aiming to 'cut through' - such as at a launch. Then there are more pragmatic but

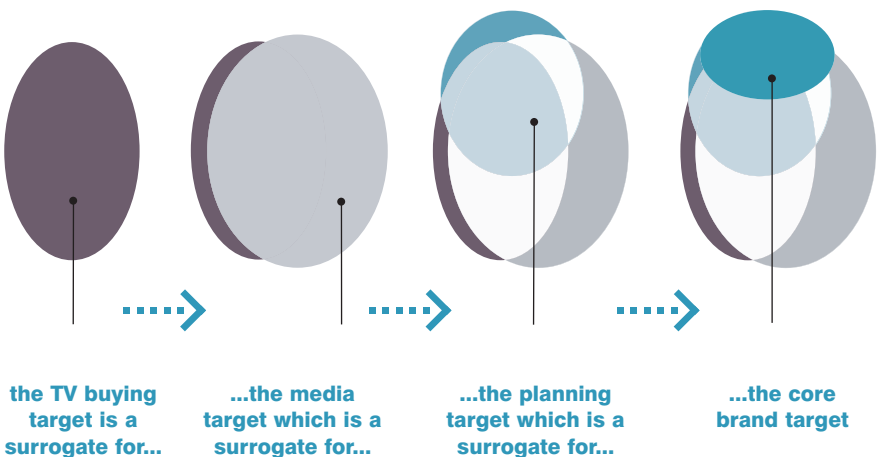
not-so-good reasons like a need to spend a budget before it is cut. Usually there are internal demands for accountability, so most marketers find that there is a need to jolt measures upwards - such as brand or advertising awareness - to prove that their advertising has worked. And, not least, there are emotional reasons too: it is natural to be impatient to reap rewards.

But can it really be the case that the reasons to buy bursts are so prevalent and compelling that they invariably over-ride the logic of sustained advertising? Seemingly so, which has prompted me to look at the merits of sustained campaigns and how changes to the television environment have affected them.

the changing nature of 'sustained advertising'

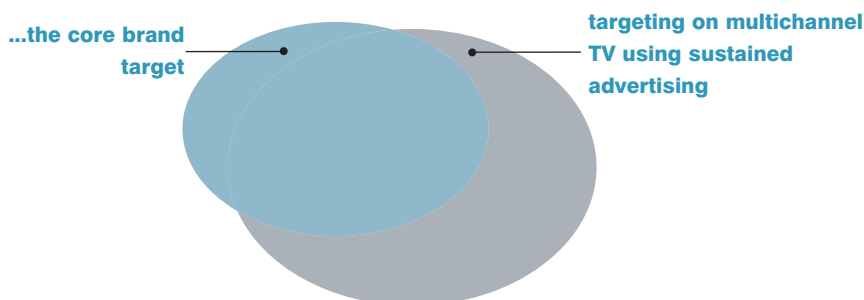
The key distinction between a sustained campaign now compared to several years ago is the degree to which the heaviest consumers - or best prospects - can now be accurately addressed. The same is

figure 1: how targeted is the targeting in a burst?



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figure 2: staying close to the core target



true when comparing sustained patterns with burst patterns. There are some disconnects along the media planning process which, as a rule, are exaggerated in burst buying, but these can be minimised by sustained advertising.

Typically, a burst is planned to maximise exposure of an advertisement to the TV buying target as a surrogate for the media target which, in turn, is a surrogate for the planning target which is a surrogate for the core brand target (see Figure 1). Despite the extent to which the targeting is known to be 'aiming off', the benchmarks favoured by media auditors and consultants are applied to the TV buying target, not the core brand target.

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Sustained advertising on multichannel TV can redress the balance. It is relatively simple to keep the core brand target in mind on multichannel TV with the help of tools such as TGI, TGRs and MediaSpan, and to plan and buy channels and programmes accordingly. (See figure 2).

There is no financial sense in the phenomenally expensive pursuit of 75%, 80%, 85% or 90% cover of the TV buying audience when those at the margins may have no interest in the product. There is more to be gained from the forensic targeting of the heaviest purchasers - the most profitable group - on multichannel TV. Instead of intense focus on cover and frequency per burst as now, measures such as average cover per week, month or purchase cycle deserve more serious consideration. Instead of crafting beautiful strike rates over six weeks and leaving the rest of the year blank, reaching a different 5% of the core target week in and week out could be the ideal, for example.

misconceptions of 'burst thinking'

The evaluation of sustained advertising challenges the conventional views of media planners. 'Cover is good but

'cover is good but expensive; frequency is cheap but to be avoided' summarises prevailing attitudes which are grounded entirely in 'burst thinking'

expensive; frequency is cheap but to be avoided' summarises prevailing attitudes which are grounded entirely in 'burst thinking'. Sustained advertising subverts the traditional tenets of media buying by effectively converting frequency into cover. Twin advantages are immediately apparent: excessive frequency becomes almost impossible to buy, and the cost of pursuing cover at a lower level than an all-out burst is significantly less which, in turn, affords a longer campaign.

Cost is a key factor in explaining the preference for bursts over sustained advertising. Television has traditionally been expensive due to the effective monopoly of ITV, and a tendency to treat TV as an all-or-nothing medium with national campaigns from major brands requiring large budgets due to their scale, rather than TV's price relative to other media. Television has had the equivalent of small ads but only on a regional basis rather than by demograph, product or size of campaign.

Old habits die hard, especially when they've been around so long that the measurement parameters have been embedded in the arrangements between advertisers and their agencies. Media auditors are well placed to suggest alternative planning approaches but they are institutionally orientated towards policing the prices and metrics of the

status quo – for example, price by sales point – rather than leading change. It takes a courageous marketing director to question prevailing wisdom and demand better solutions from his or her agency. Going against convention does not appeal to many, but economic conditions are not so luxurious that TV advertisers can continue paying an exorbitant premium to reach the far-flung margins of TV buying audiences for scant reward.

It could be the case, of course, that media planners are very aware of the unexploited opportunities available and are eager to change airtime schedules but are restricted by the deals negotiated by their broadcast colleagues. Some deals, notably with ITV, have history and precedents weighing heavily upon them. The creation of the new ITV sales monopoly should provide an impetus for planners and agency negotiators to encourage their clients' advertising to catch up with high-spending viewers, who have reduced their viewing of terrestrial channels in favour of satellite channels. However, Ofcom's 'Contract Rights Renewal' mechanism adds confusion and inhibits the motivation to do so.

Other obstacles prevent sustained advertising being looked upon favourably, however. Television is the only medium subjected to the expectation of precisely simultaneous advertising exposure. A few larger spots rather than reams of smaller ones appeals more to tidy-minded aesthetes than those in the know, but they offer little else to justify the premiums payable. Those who demand large spots argue that their ability to reach light viewers is irreplaceable. This is often true, but the imperative to reach light viewers is invariably to increase cover of a TV buying

change in practice is media planning keeping up with the pace?

audience, rather than a reflection of their value as consumers. The target viewer sees the ad, and is entirely unaffected by whether one other person has seen it in the same second or ten million others. There is no cost per spot to worry about because one only pays for the audience reached, and schedule booking is largely automated.

using the right tools

Sustained advertising will generally fail when measured against tools designed for bursts. For example, it will not obviously cause upward blips in spontaneous recall or advertising awareness. Is that a failure

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of the communication method, or the measurement of it? Sustained advertising can be expected to drive slow and steady growth in commonly-used metrics – not necessarily exciting to achieve, but it does bode well for cash flow. Few businesses prefer volatility to predictability. Sudden surges in demand and equally abrupt quiet patches are not known recipes for business success.

The new medium of television is far removed from the television of old. It is a wall-mounted plasma widescreen TV with surround sound, compared to a bulging square black and white set on spindly legs. The fact that it is still 'television' has hidden the true extent of its transformation, as have industry metrics and traditional

practices which have caused conservatism amongst advertisers using TV. I'd like to put the 'R.I.P.' in drip, emphasise the 'sussed' in sustained, and may the enlightened prosper. ■

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¹ The author wishes to thank Peter Bowman of UKTV for his technical and historical contributions to this article.

² 'Media planning: Recency Planning': Erwin Ephron, Admap, February 1997.