

a research perspective

redressing the TV turn-off

Peter Bowman and Mike Smallwood



“Rapid market fragmentation, the new media explosion, and worsening advertising clutter is making it increasingly difficult for brands to communicate effectively with audiences”

Source: Jeremy Found, head of media, COI

Over the last decade or more commercial TV – multichannel TV especially – has been under fire for over-long breaks containing too many commercial and promotional messages. Specifically, several research studies pointed to a subsequent loss of advertisement recall among viewers to those breaks. In response to this we have introduced the UKTV Junctions Manifesto which will limit all junctions to a maximum of five minutes. Needless to say its development was underpinned by rigorous research.

rationale for change

UKTV is committed to delivering optimum value to both viewers and advertisers. We acknowledge that the complex multichannel environment has challenged advertisers' ability to communicate effectively with viewers – viewers whose presence needs to be retained through the breaks and whose engagement with the messages in the break needs to be enhanced. The Junctions Manifesto will benefit advertisers by improving ad recall. Our viewers will demonstrate improved trailer recall and deeper engagement with break contents. Their ability to navigate around the UKTV network, meanwhile, will be improved by UKTV's network communication reforms. It was UKTV's belief that these benefits would flow, so a research programme was designed to test the hypotheses.

we recognise that too many messages on multichannel TV both discourages audience retention and encourages negative perceptions of the whole output

past insight and received wisdom

UKTV wanted to build on a mass of evidence from previous initiatives. In 1993, ITV had found that viewers could be positive about some forms of break content – such as trailers and sponsorship – although steps were also taken to limit turn-offs, like lengthy end credits. In 1994, Channel 4 pointed to higher ad recall in breaks surrounded by enjoyable or attention-grabbing programmes. On the negative side, though, a lengthy series of studies by the Billett Consultancy over the last decade has highlighted that the number of messages in ad breaks diminished recall. Billett's research also maintained that this clutter was on the increase. More specifically, Mediaedge:CIA estimated that ad recall on basic pay channels was less than on commercial terrestrial channels, and blamed break structure and contents for the shortfall.

In the US meanwhile, advertisers have praised the Meredith Broadcasting Group

whose station in Atlanta, WGNX, dropped three minutes of ads from two hours of newscasts ... and saw ratings jump by 21%. Given the recent rapid growth of multichannel television closer to home, competition for advertising is more severe and the 'stickiness' of viewers has further diminished, so we must drive every possible enhancement of advertising effectiveness for our customers. Why not take a leaf out of WGNX's book?

research objectives

Our research programme was to be unique because we wanted to test the optimum break length and structure from several viewpoints – the viewers', the advertisers' and our own corporate objectives. Junction effectiveness was to be evaluated in terms of: recall of commercials; recall of promotions; audience attention and retention; viewer perceptions of UKTV; and enhanced potential for navigation around our network. We believe this programme gives UKTV access to an unparalleled overview of real viewer opinion.

research methodology

The research itself was as multi-faceted as the objectives, and involved an extensive range of activity with other parties. Our partners were The Billett Consultancy – via a quantitative project undertaken by BMRB – and the Blinc Partnership. We have also

	Billett/BMRB	Blinc	Carat
methodology	Pre/post recall. Telephone interviews	Realtime response/Hall test MTM technology Engagement/dial test Qual break outs	2 stage quals: 12 in-home depth interviews 12 focus groups + pre completed diary
sample size	665 respondents (weighted)	300 respondents	12 depths 12 focus groups
fieldwork	Sep-Oct 03	Sep 03	Aug 03
variants	Pre: 7.5 min break Post: 5.0 min break	Existing junction + 2 new junction variants	Qual. discussion of stimulus reels + viewer proposals

figure 1: methodology summary

had a degree of input and access to a Carat Insight project. Around 1,000 respondents were contacted in telephone interviews or hall tests. In addition there were 12 depth interviews and 12 focus groups (see figure 1).

Research stimulus material mirrored the variety of approaches. Three hundred Blinc respondents viewed a typical current junction and two shorter/re-versioned junctions. BMRB contacted respondents requested to watch UKTV Gold programmes on air as if pre- and post- our manifesto. Similar ads ran in identical programmes, firstly in breaks lasting 7.5 minutes and secondly in breaks lasting 4.5 minutes. Carat exposed respondents to stimulus reels including a current junction and a female-focused junction. The results of all this were telling.

viewers are adept in their management of breaks

Much has been said in recent years about the 'audience as editor'. A succession of innovations – remote controls, multi-set households, growing channel choice – have converted viewing from a passive to an active function. Perhaps more important than these has been a growing awareness of how to use their media, a quality well to the fore in these studies. Carat and Blinc show viewers in tune with the pattern and content of breaks and their length. Their inclination is to tune out, yet they know exactly when to return as the programme restarts.

Many of the challenges outlined so far are the consequence of viewers being virtually programmed to take action as a break arrives. Central to the Blinc project is the recording of reaction 'moment to moment' via a hand-held dial. The 'engagement line' reveals viewers immediately considering

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their options as the break begins. They have a hierarchy of interest topped by favourite shows. They can tolerate and be involved with trailers and ads, but in the midst of enjoyable viewing, they want more information on what they can watch next/in the near future, and the tendency is to tune out of what doesn't fit with that.

awareness increases significantly in shorter junctions

Both Billett/BMRB and Blinc reveal significant awareness bonuses after breaks have been to an extent de-cluttered. A major part of the Blinc process was to decrease the number of commercials – from nine to seven. As a result, the proportion of ads recalled rose from 55% to 75%. BMRB showed greatest increases in the spontaneous recall of three or more ads (of the six ads common to both waves). Also, the awareness gains were happily skewed towards key groups for UKTV – the mean number of ads recalled increased 30% among under-35s and 37% among women. Progress appeared to be made in retention through the break, as spontaneous recall for any of the latter three ads in the break rose 18%, twice the level for the whole break.

quality and relevance are key

So content has beneficial effects – and so does context. Each of the studies

highlighted the benefits of both relevance and quality in the programmes, the advertising in the breaks, and the content of the promotions. The BMRB study recruited respondents who viewed at home real life breaks (measured by BARB) in normally scheduled programmes, including Only Fools and Horses and Gimme, Gimme, Gimme. Their appreciation/enjoyment of those programmes was probed. The number of ads spontaneously recalled was much higher among those rating the host programme above seven on a ten-point enjoyment scale. Viewers had praise for appropriate break activity, but were swift to criticise inappropriate, irritating or repetitive executions. Blinc highlighted the difference between an apparently strong, and a weaker junction. The built-in feel for the duration of breaks comes into play. Blinc shows trailers at the end of centre breaks and at the beginning of end breaks seem to be moments of greatest engagement.

De-cluttering is a vital part of this process, but entertainment in the breaks is also key. Junctions should not offer information without context. The de-cluttered breaks in the Blinc research appeared to boost ease of navigation between the various UKTV channels, and marginally reinforced the perception of the choice of viewing offered by those channels. Carat revealed that ads as such are generally accepted, and can be engaging or entertaining. But a range of factors influences that acceptance. Break retention is hindered by, for instance, a sense of fatigue and over-exposure brought on by formulaic or tacky approaches.

promotions are valued and used

The work with Carat corroborated the ITV findings of a decade ago in that

programme trailers are not regarded as 'clutter' by viewers. When helpful, they give a reason to stay through a break, removing the need to search through channels or refer to paper guides. By being relevant (for example, 'if you're watching this, you

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might like this'), they represent the channel giving something back to its viewers, and their content tends to be 'inoffensive', lacking a hard sell. Turn-offs were over-promotion of sister channels, over-statement and too much or too little notice. Blinc showed how viewers preferred menus and 'now and next' devices for navigation. Blinc also revealed how recall of trailers seemed to decline in the

uncluttered breaks, in which fewer ads led to higher ad recall (see Figure 4). Does this suggest that viewers do differentiate between ad content and promo content?

Overall, the core message was that broadcasters must maintain the appropriate balance between all the elements within the junction.

non-programme minutage in multichannel near saturation

Earlier we mentioned 'active' and 'passive' viewers. Viewers do have strong views on the levels and quality of non-programme minutage, as clearly shown in the Carat study. Viewers differentiate between channels on the basis of the content they expect in breaks. If, on the one hand, it is a given that the BBC will air quality promos for and between quality programmes, on non-terrestrial channels 'daytime' breaks are seen as the norm, characterised by less high quality/strong brand advertising. Indeed, breaks on non-terrestrial channels



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can have a negative impact on the whole channel brand image. Non-terrestrial channels are known to run longer breaks. Any combination of lengthy breaks, repetitive contents and 'poor' advertising can be deterrents to audience retention through the breaks.

viewers will (cautiously) welcome our plans

Carat asked viewers to identify the requirements of a valuable or ideal junction. These viewers tended to question familiar or repetitive formats. More unique approaches like inter-weaving trailers between ads were mooted to retain interest. The respondents'/viewers' focus was on variety of break content. Regulations could prevent what viewers propose. To this frustration, is added a certain cynicism revealed in the Blinc focus groups. Reducing clutter? Fine, they'll find a way of putting more ads in: 'they will make us suffer in some other way'.

So, the programme of research was thorough and multi-faceted. The conclusions have implications concerning viewers and advertisers. Everything, really, is based on viewer behaviour. Our viewers are revealed as adept at navigating through breaks, and if they feel it necessary, avoiding inappropriate content. If our channels have shorter breaks, the advertiser benefits. Blinc demonstrated

major gains in recall when the number of commercials in a break was reduced from nine to seven. The Billett/BMRB study demonstrates significant ad recall gain among key audiences and those involved in our programming.

While duration and number of messages are key factors, the structure of breaks and their content are barely less so. Viewers respond well to variety and challenging formats. Promotional and advertising elements are perceived separately by viewers. The media auditors' word 'clutter' has no currency amongst viewers – relevant and appropriate break contents, whether ads or programme trailers, are appreciated by viewers. We recognise that too many messages on multichannel TV both discourages audience retention and encourages negative perceptions of the whole output, so we are confident that viewers will welcome UKTV's junction initiatives.

The implication of these findings is that our Junctions Manifesto will limit all breaks to a maximum of five minutes. In those breaks, commercial minutage will not exceed 3.5 minutes, promotional minutage will not exceed 1.5 minutes, and promotional executions will be limited to a maximum of 3 in any break. Meanwhile, UKTV will seek to develop an enhanced fit between editorial and commercial output. ■

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