

a creative perspective

breaking free from the ad break

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Despite three very tough years advertising creativity is alive and well - amongst the UK's leading advertisers and agencies, at least. Yet the basic product format of TV advertising – spots in breaks – has remained virtually unchanged for decades. So what's the alternative?

Recently I was queuing at the checkout of a BP Connect, waiting to pay for a can of baked beans and a bottle of wine, when I couldn't help being tempted by a prominent display of Quality Street Big Purple Ones. Hang on a minute, I thought, is that really the same Quality Street brand I remember from my childhood? The wrapped chocolates in the big old-fashioned metal tin that only ever seemed to appear at Christmas? The ones "made for sharing"? What an elegantly simple idea – identifying everyone's favourite, producing it in a not-made-for-sharing size, giving it a delightfully obvious name that wouldn't have taken months of brand consultancy to come up with (well, let's hope) and then making it easy for us to buy in places where we might just fancy one.

My encounter with The Big Purple One is an example of just how much change has happened in everyday markets like grocery in recent years. To state the blindingly obvious, we're all living through a period of enormous change and this is having dramatic effects on just about every industry and every market.



Yet given these changes, it is notable that there has been relatively little innovation in

the ways in which advertisers use TV to promote their brands.

I'm not referring to the quality of creative thinking within the confines of traditional commercial breaks. Despite three very tough years in the industry there is ample evidence on TV every day that creativity is alive and well amongst the UK's best advertisers and agencies. However, the basic product format of TV advertising – spots in breaks – has remained virtually unchanged since my first job in an agency back in the mid-80s.

the importance of product innovation

It would be unfair to draw comparisons with dynamic sectors like telecommunications or consumer electronics, but even in grocery markets – the bedrock of commercial television since Gibbs SR toothpaste first appeared in an ice block on ITV in 1955 – the rampant product innovation of recent years leaves TV advertising looking unimaginative and pedestrian by comparison.

One of the first things I learned as a junior account man in advertising was to master the art of the storecheck. Working predominantly on grocery brands I spent many a happy hour cruising the aisles of Tesco, discreetly jotting down details of on-pack promotions, new flavour variants and

own label prices. A storecheck today reveals that huge changes have happened in grocery markets over the past ten years or so. For a start, a lot of the information I used to scribble on the back of fake shopping lists can now be obtained from the comfort of my own PC - on tesco.com or other home shopping sites. In the bricks and mortar world I could choose between a Tesco superstore, a Tesco Metro, a Tesco Express and a Tesco Extra. Or alternative retail formats like Sainsbury's Local, M&S Simply Food or, for quick drive time diversions to buy beans and wine, BP Connect.

Similar trends are happening in other retail markets. The UK's retail structure is rapidly becoming more format-driven. A single retail brand can offer itself to us in different configurations depending on our location, our working patterns, our life stage or even our shopping mood. This retail innovation has been accompanied by high levels of new product activity, amongst food brands in particular.

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Look down the league table of the UK's biggest grocery brands and you'll see all the familiar names that would have been there five or ten years ago: Coca-Cola; Walkers; Nescafe; Andrex; Persil; Hovis; and so on. All brands that have traditionally invested heavily in TV advertising. However, brands like these have not stayed big simply by maintaining high adspends. In every aisle of your local supermarket you'll find evidence not just of more traditional new product development (new flavour, new improved formula, lower fat, now even healthier, and so on) but genuinely new product formats. From Maltesers ice cream to DairyLea Dunkers, from Walkers Sensations to The Big Purple One, manufacturers have mirrored retailers in finding new ways to deliver their brands to give them differentiated appeal in our rapidly changing lives. FMCG markets have been further invigorated by the appearance and rapid growth of completely new names like Innocent, Red Bull and Bacardi Breezer – not just new brands but whole new categories that have sprung up since my early storechecking days.

product innovation on TV

To quote AC Nielsen, the grand master of retail analysis: "innovation keeps a market healthy. It inspires choice and, importantly for the manufacturer, it delivers a point of difference and builds value into a category. Without innovation, all that is left is price". So if grocery markets have been characterised in recent years by extensive product innovation, what has happened on our side of the TV screen?

Is innovation keeping our market healthy? How are we creating value for our consumers? Have we seen the emergence

of genuinely new and fresh formats in TV programming and TV advertising?

Let's start with the programmes themselves. It's interesting to look at the most-watched shows over the past year compared with five years ago. The league tables look quite similar. As we would expect, the top ten is dominated by the major soaps and familiar names have been enduringly popular: Heartbeat; The Bill; Only Fools and Horses; Casualty. Familiar genres have also had lasting appeal: for Birds of a Feather five years ago read My Family today; for It'll Be Alright On The Night read Outtake TV; for Morse read Frost.

hardy perennials and hybrid formats

If programmes and genres like these are the equivalents of hardy perennial brands like Ariel, Whiskas and Pampers they have been accompanied in recent years by the emergence of genuinely new 'genre-busting' programme formats. Innovative shows like I'm A Celebrity...; Popstars; Test The Nation; and, of course, Big Brother have achieved hit status, regularly drawing audiences of 9 million plus for the major terrestrial channels. On a smaller scale, Trouble's Cruel Summer gave its teenage audience ultimate control over the show's contestants; BBC Three viewers could buy and sell 'shares' in celebrities by registering with Celebdaq; and UKTV Gold's Battle of the Monstrous Bosses culminated in a live public vote to decide who was the most monstrous: Brent or Fawty.

There are many other examples like these springing up across the EPG, all giving us new ways to engage with and participate in

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television. We can now feel we have a stake in the narrative and outcomes of some of our favourite shows. We can vote people in or out, we can text our comments to live updates, we can personalise the experience by pressing the red button, and we can feel our own influence on the twists and turns of public opinion as we follow developments over several weeks. In many ways these new programme formats offer us much richer forms of involvement and entertainment than simply following the latest plot developments in *Albert Square* or *the Rovers Return*.

But the big question is this; if innovative programme formats have helped to generate new interest in television as a medium and maintain healthy audiences for advertisers, has the TV advertising market been stimulated by equally creative new formats? The answer, with a handful of honourable exceptions, is a resounding: no.

the traditional ad spot: an enduring presence

For all the recent talk and hype about advertiser funded programming (AFP) an extremely high percentage of airtime carrying brand messages is still served up in the form of traditional spots in commercial breaks. For example, analysis of commercial airtime shows that nearly half of the time is bought in the form of 30-

second spots, 25% in 20s, 20% in 10s, and 8% in 40s. A tiny percentage of commercial airtime is currently delivered in less conventional time lengths like 5s, 90s or 120s, let alone sponsorship idents or any form of advertiser-funded content.

My point is simply that evidence of many advertisers using innovative promotional formats is not easy to find. It's true that a handful of brands have broken free from the confines of commercial breaks with the production of new forms of branded content. Toyota and Gillette were early innovators with their *Worlds of Wildlife* and *Sport* respectively. The *Pepsi Chart Show* ran for four years on five. More recently *Carling's Homecoming*; *Johnnie Walker's Keep Walking*; *Oracle's The Players*; *Kotex's Girl's Talk*; and *Heinz's Dinner Doctors* all prove that imaginative branded programming can work for advertisers and broadcasters alike. The latest wave of branded programmes has included *Nokia's Fashion House* and *Smirnoff's The Joy of Decks*, but these are still relatively isolated, off-peak outbreaks of "new product development" in a market in which the vast majority of advertisers and their agencies still appear reluctant to venture far from the comfort zone of traditional spots in breaks.

An argument I hear frequently is that traditional spot advertising is still a £3 billion market and major advertisers like Unilever and P&G still have faith in it, so surely they can't all be wrong. What's more, the enduring and convincing influence of the IPA Advertising Effectiveness Awards serves as an emphatic endorsement of the power of TV advertising to make a measurable business contribution.

Well, I half-agree. There's no doubt that great TV advertising is still extremely powerful. However, even the most distinctive and memorable creative work still tends to be served up in a traditional product format – in other words, spots of familiar (short) time lengths to run in rented space in a commercial break. No matter how creative the execution, commercials like these are TV advertising's equivalent of 'new improved formula', 'great new taste', or 'this season's colour'. Evidence of genuinely new TV advertising and promotional formats is thin on the ground.

So does this really matter? To maintain the health of television as a medium, isn't it enough to continue to seek new hit programmes that will get talked about and attract audiences? Or develop expertly-targeted niche channels that attract like-minded groups of viewers in meaningful quantities? All with the aim of delivering valuable audiences for advertisers to reach during the few minutes each hour designated as commercial break time?

the worst case scenario

Well, perhaps it doesn't matter so long as we continue to believe that despite the hit-or-miss nature of breaks there will always be significant numbers of people willing to pay some form of attention and to take in at least some form of messaging during the breaks. But Living Room Labs – unique research commissioned by BBC Broadcast (see Chapter 4) – suggests that this could be a dangerous assumption. Since the very first remote controls and VCRs with fast-forward buttons entered our homes, there have been prophets of doom forecasting the demise of commercial breaks. Advertising would be zapped away by viewers and commercial television

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would collapse.

This bleak scenario hasn't materialised but has this led to a touch of complacency amongst all those with vested interests in the future health of TV advertising – broadcasters, sales teams, planners, buyers, creative agencies and advertisers alike? Our research underlined just how much of a challenge it is these days to attract and maintain viewer attention to the bits between the programmes on commercial TV. It's difficult enough to keep them watching the programmes themselves.

'viewing' with a 'third eye'

Viewers these days are 'hardwired' to understand the TV landscape. They navigate their way round it skilfully and intuitively, with a sophisticated appreciation

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of the grammar of TV. What this means in practice is that many viewers can quite happily watch more than one programme at the same time and follow the narrative thread of each, they can sample what's on offer from their EPG the moment they sense a commercial break approaching and they can watch with a 'third eye' – which means they can absorb huge amounts of content and information while apparently not watching.



third eye

To illustrate this last point, one woman in our research was observed by our moderator with her back turned to the TV for the full duration of a promotional trailer yet still commented on how good looking "that Nigel Havers" was and still claimed to have watched the trailer in her end-of-evening diary. It wasn't an empty claim – she had watched with her third eye. At the sharp end of this advanced TV viewing behaviour are the Super Surfers. Our Living Room Labs research suggested that one in four viewers fit this description, but amongst under-24s it's more like three in four. Teenagers and twentysomethings have grown up without inheriting the terrestrial mental map and have become 'TV tarts' with little channel loyalty and low attention spans.

For young Super Surfers, TV is a place to browse and cruise on the lookout for bite-size treats. They would rather surf and sample than sit and be sold to in breaks. After all, it's estimated that we're exposed to around 3,000 commercial messages a day. Young people in particular have grown up with the ability to filter them out or process them at a very low level of involvement, unless they offer rewarding moments of interest, novelty or entertainment. PHD's recent Audience Safari research drew similar conclusions, describing young viewers as 'children of chaos' and emphasizing the need for all TV content – not just the programmes but the junctions between them – to have what they called 'dip-ability'.

These rapidly-changing patterns of viewing behaviour are happening today in millions of living rooms even without the widespread availability and use of personal video recorders (PVRs), but as anyone who has ever used Sky+ or TiVo will be only too keen to tell you PVRs have a dramatic effect on a viewer's relationship with commercial breaks. In fact, they tend to eliminate that relationship completely: 88% of PVR users skip ads, according to TiVo's research into early adopters a few years ago. This may not be of too much concern

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for advertisers as long as PVR penetration remains at its current low level, but what will happen when the next generations of TVs with built-in hard drives become as familiar as VCRs and DVDs, or when Microsoft's Media Center PC (which, at the time of writing, is being promoted aggressively in the US) makes real inroads in the UK market?

so who's to blame?

Some would argue that we will soon reach an inflection point in the history of TV advertising beyond which the whole structure of the commercial TV business model will be forced to change beyond recognition. Without getting drawn into long-term predictions, it is reasonable to ask why, in the face of such far-reaching changes in audience behaviour, all those with vested interests in the traditional spots-in-breaks model have demonstrated little urgency in exploring alternative, innovative promotional formats? It would be convenient for them to lay the responsibility firmly at the door of the Independent Television Commission (now Ofcom). The regulations surrounding TV advertising and sponsorship have been undeniably prohibitive, standing in the way of some of the more overt forms of brand programming and product placement that, for example, US regulators would find acceptable. However, all markets are constrained by various forms of regulation. Lateral ideas and fresh thinking are needed to keep markets dynamic without flouting the rules.

A more insightful set of reasons why our industry still clings to conventional structures was suggested by Louise Jones of PHD at last year's Bath TV United conference. Media planners, media

buyers, advertising sellers and broadcasters are all, according to Jones, holding the medium back: planners because they are guilty of over-segmenting the audience and disappearing into an "ambient oblivion"; buyers because they are driven by media auditors and are more concerned with the price of TV than its value; sellers because they persist with outdated trading mechanisms and broadcasters because they are spoiling TV for viewers by increasing the length of ad breaks and generally transmitting more clutter.

obstacles to change

To the last point it is worth adding that amongst broadcasters there tends to be a lack of alignment and communication between the people responsible for the commercial side of the business and the people commissioning programmes.

Faced with an audience including numerous senior marketing clients, Jones was perhaps too polite to include the marketing community in her list of culprits. Yet the most fundamental reason why traditional commercial breaks still rule the roost lies in the basic theory and practice of marketing which is lived out routinely by most marketing people and their advertising agencies and has remained largely unchanged for two or three decades. Conventional marketing experience leads many marketing people to accept that their role is primarily about control, for example control of pricing, control of distribution, control of brand architecture and control of NPD strategies.

The problem is that traditional advertising approaches attempt to apply the same degree of certainty to the way in which

brand messages are delivered to and received by consumers. The researcher Wendy Gordon has pointed out the flaws in the military language that tends to be used – the language of control that defines people as a ‘target market’ to which messages can be ‘aimed’ via ‘bursts’ - or even ‘flights’ - of advertising.

out of control

By continuing to use this kind of language and perpetuating our outdated trading rituals and currency (As and Bs and C1s and so forth) most people involved in

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commissioning, creating, planning, buying and selling TV advertising cling on to the illusion that they’re still in control. But (pause for dramatic effect): we’re not in control any more. As Living Room Labs served to emphasise, control has passed to our viewers. Interrupting their viewing with targeted hits of commercial messaging may no longer be possible or acceptable. In the words of the advertising planner and author John Grant, what he calls ‘new marketing’ is “voluntary and participative”. It’s about ideas and content that the audience chooses to engage with and, in their own way, contribute to rather than ideas simply beamed at them in the middle of a commercial break (which they have possibly chosen not to watch anyway).

When more advertisers and agencies face up to this reality they will be more inclined to embrace new ways of reaching people with rewarding entertainment that forges new relationships between the brand and its audience. To quote Steve Heyer, chief operating officer of Coca-Cola, in an influential speech last year: “We’re headed to ideas ... ideas that bring entertainment value to our brands and ideas that integrate our brands into entertainment”.

a new model for a new TV environment

The key word here is value. The best TV programmes have always offered value for the viewer in a variety of ways, from laughter to excitement, from knowledge to sheer escapism. When advertisers start thinking harder about how to create value for their audiences, new opportunities present themselves involving new collaborations between commissioners, sales houses, media agencies, creative agencies, production companies and advertisers. The brands that benefit most will be those with the best content ideas: best in terms of brand relevance, best in terms of fit with a channel’s editorial voice

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and, ultimately, best in terms of audience appeal. If these new forms of branded content run in programming time, as distinct from commercial or advertorial time, advertisers will need to be prepared to relinquish a degree of control but in return they will have the chance to create valuable and 'ownable' properties which can be exploited in numerous ways beyond the TV screen.

As an illustration of this thinking, BBC Broadcast recently created and produced a series of programmes to coincide with the relaunch of the Renault Scenic. Sixteen short films were produced, each featuring locations around the UK that offer viewers great days out. The programmes were funded by Renault and ran on UKTV channels. For example, UKTV Gold viewers could learn about locations used in famous movies, like Alnwick Castle (aka Hogwarts). UKTV Style featured some of the UK's most stunning period houses and gardens, like Mount Stewart, with UKTV

History running programmes about places of historical interest, like Culloden, Powis Castle and Chartwell Manor.

UKTV scheduled these Scenic Days Out films in programming time (listed in the schedule), not commercial airtime, offering their viewers relevant and rewarding bite-size treats. Renault's brand association was limited to sponsorship credits and strip ads pointing to scheduled times in listings guides, but in Scenic Days Out they had a property that could engage their audience beyond TV, with a 36 page magazine distributed as an insert in the Radio Times and other BBC magazines and longer versions of the programmes available for dealerships or other promotional purposes. Scenic Days Out did not replace traditional spot advertising: the programmes ran alongside a new TV campaign encouraging people to go out more. The cross-media sponsorship project was designed to complement the advertising and offer people valuable



content, of particular relevance during the October schools half-term break.

brands as content providers

A new venture like this could only be realised with close collaboration between an advertiser, a media agency, a broadcaster, a sales house, a publisher and a creative/production company (in this case, Renault, Carat, UKTV, **ids**, BBC Magazines and BBC Broadcast). The degree of difficulty for all parties is higher than it is in producing traditional advertising. New relationships have to be forged and comfort zones have to be left behind. In this new model, brands become providers of content in their own right. Just as The Big Purple One and other grocery brands offer themselves to us in new formats, brands can offer us TV content that breaks out of commercial breaks. These new forms of content need to stand on their own merits, not just reflecting the brand's values and proposition but also capable of keeping a remote control-happy audience watching.

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content, advertisers have a lot to gain by finding new ways to deliver value to their consumers and breaking free from the ad break. ■

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It is difficult to predict how fast the traditional interruption model of TV advertising will evolve over the next few years but our Living Room Labs research has underlined the challenges it faces. What is certain is that as 2004 unfolds, with the TV advertising market regrouping after the Carlton/Granada merger and Ofcom widely expected to adopt a more relaxed approach to responsible branded