

Engagement:

Understanding Consumers' Relationships with Media

emotional response

enjoyment

consumer control

involvement

multitasking

relevance

trust

Engagement:

Understanding Consumers' Relationships with Media

“Why is engagement so important? In a world with so much consumer choice and with all the challenges they face, marketers need to make sure their advertising works....The issue is how advertisers can connect with people. It is now about engagement.”

— Wenda Harris Millard, Chief Revenue Officer, Yahoo!

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The era when consumers welcomed advertising into their lives has passed. The number of media that carry advertising and the number of messages within each medium have increased dramatically. In addition, advertising is appearing in ways that did not exist before, such as in branded entertainment or PDA and cell phone downloads. Advertising has become an increasingly pervasive aspect to everyday life and so has “ad clutter.”

Why focus on engagement?

As media choices have proliferated, consumer expectations have changed. Consumers increasingly insist on being able to consume media when and where they want, on any platform or device, and in any context—and the technology and media industries are obliging them. Consumers have a newfound control over their media experiences.

How are these newly empowered consumers responding to the escalation in advertising messages? By using technology and other means to keep out advertising that does not connect with them.

In other words, consumers are rejecting or ignoring advertising that does not engage them.

Consequently, advertisers are eager to increase the engagement of their advertising. Why? Because advertisers are increasingly demanding accountability for the money they spend on their marketing, and they see a link between increasing consumers’ connection with advertising and producing positive bottom-line results.

Advertisers believe that engagement ultimately holds the key to increasing ROI.

In response, the Association of National Advertisers (ANA), the American Association of Advertising Agencies (4As) and the Advertising Research Foundation (ARF) have partnered to find out how to define and ultimately measure engagement across media in a project called “Measurement Initiative: Advertisers, Agencies, Media and Researchers” or “MI4.”

Until MI4’s findings are released, studies that have been conducted across media already provide some revealing insights into dimensions of consumer engagement. This guide gathers together some of the most recent engagement research on major media and their advertising and provides an overview of what is known thus far about:

- **What elements comprise engagement**
- **How these elements are being measured**
- **How engagement varies among different demographic, product category and brand segments**

Media Landscape Time Comparison

	1980s	2004/5
Number of Commercial TV Stations	700	1,345
Average Number of TV Sets per Home	1.8	2.6
Average Number of Channels Available per TV Household	11	103
Three-Network Primetime Household Share	75%	36%
Cable Penetration (+ADS)	40%	92%
VCR Penetration	1%	87%
Remote Control Penetration	50%	*95%+
Number of Radio Stations	8,748	13,838
Home Computer Penetration	5%	66%
Number of Consumer Magazines	1,500	*5,340
Number of Place-Based Media Options	—	Infinite

*2003 data. Source: “Are You Experienced? The Development of an Engagement-Based Planning Approach in Print,” Fielding and Bahary, Starcom, 2005

- **The relationship between the media environment and the advertising message**
- **The link between engagement and accountability**
- **The future of engagement research**

What is engagement?

Defining engagement can be a slippery endeavor. Is engagement what the consumer feels when he or she sees an ad? Is it degree of interest? Does it predict how a consumer will respond to advertising? Some would say that engagement is all of the above, plus many other qualities as well. A host of definitions for engagement exist already, and many more are emerging. Terms often associated with engagement include:

- Involvement
- Connection
- Resonance
- Stickiness
- Experience
- Wantedness
- Relationship

As with accountability, the creation of a “one size fits all,” universal definition of engagement is unlikely, particularly across media. However, much can be learned by looking at the focus of recent engagement research and how it has been conducted. The following sections will look at:

- Methods that have been used to measure engagement
- What recent studies have revealed about the various dimensions of engagement—from an “exposure”-based standpoint (i.e., time spent with a medium and attentiveness) to qualitative aspects, such as emotional response, relevance and consumer experiences with media
- The impact of engagement on advertising results

In addition, some working hypotheses about engagement will be investigated, including how:

- Engagement is dependent on both consumers’ opportunities to see advertising and their connection with the advertising itself
- Engagement with a medium does not necessarily mean engagement with advertising in the medium
- Multiple factors affect conclusions about engagement, including:
 - Engagement may be more about the fit among the advertising message, consumers and the media environment than one single comprehensive ranking of engagement
 - What affects engagement may differ by market segment, medium or genres within a medium or ad category

Measures of engagement

Though still nascent, the study of engagement is being approached from various directions, using methods that range from in-depth survey techniques to observing consumers in their homes to measuring consumers' physical responses to advertising. Each technique provides important—and diverse—insights into helping to define and eventually provide clearer measures of engagement.

No matter what name it goes by, measuring engagement is complex because it attempts to quantify the qualitative. Research has shown that a number of factors affect engagement, including those related to:

- Message, i.e., the quality of advertising creative
- Media environment—the attributes of the medium that affect advertising receptivity
- Consumer—the mindset and physical situations that affect receptivity

Surveys

Survey methods vary and can affect the outcome of research, even when no influence is intended. The three basic forms of questionnaires, each of which has variants, are:

Paper: Administered in-person (face-to-face) by an interviewer or self-completed by a respondent (including diaries)—via the mail or at a specific location

Telephone: Administered by an interviewer either from a paper questionnaire or a computer-assisted questionnaire (CATI) using an automated system typically known as IVR (interactive voice response)

Computer: Administered in a variety of ways, including via:

- An e-mailed invitation with an embedded dynamic link to a secure survey or a website
- An intercept (pop-up) questionnaire at a website
- A computer-assisted personal interview (CAPI) via Internet, kiosk, cell phone, PDA or a similar hand-held device

Computer-based surveys are typically self-administered.

Interpreting survey findings must take into account variables that can affect the results, such as:

- Method of asking and phrasing of the question
- What time of day the question is asked
- The time of year (season) the question is asked
- How much time has elapsed from the time the respondent experienced the ad and the question is asked
- Where the question is asked
- The vehicle—Internet, paper, phone, etc.—through which the survey is administered

“In a media-saturated environment where consumers are using more than one medium at a time, understanding which medium they pay most attention to is as important as knowing which media reach them.”

— James Geoghegan, President, Media Head

“Neuroscience promises to measure... gut feel. It makes it easier for us to sell what we believe is right.”

— Jonathan Harries, Foote, Cone & Belding, *Adweek*, January 16, 2006

Observation

In this technique, researchers shadow study participants to observe and record their activities and behaviors over a specified period of time (generally for as much of the day as possible). Though the most labor-intensive technique, observation allows researchers to gather firsthand qualitative data. The observation method is often considered the most accurate form of research, but it has a potential bias because the person being observed may alter his/her behavior due to being watched.

Physiological Data

A number of data gathering methods are being used to track participants' physiological responses to advertising, shedding light on how advertising affects consumers at a very basic level. Researchers believe that physical responses don't “lie”—if a consumer is affected by advertising, it will show up with increased heart rate or a change in brain waves or in other ways. Among the physiological methods being used are:

- Pulse and sweat meters
- MRIs to measure brain waves
- Face muscle observations
- Heart rate and skin conduction

As with observation, potential bias needs to be accounted for when collecting physiological data—response may be affected by the presence of assessment tools.

Dimensions of engagement

Given the complexity of assessing how consumers interact with advertising, various dimensions of engagement have been studied from both exposure-based and qualitative standpoints. Dimensions of engagement are not necessarily separate from one another—they sometimes overlap.

Exposure-based dimensions of engagement include:

- Time spent with a medium and its advertising
- Attentiveness, which may be driven by qualitative factors, environmental factors (such as the presence of others or ambient noise) or behaviors such as multitasking. Multitasking may be defined by:
 - Use of media while engaging in life activities
 - Use of media simultaneously (concurrent media usage)

Qualitative dimensions of engagement include factors that relate to a consumer's relationship with media and the advertising in it, such as:

“We need to deconstruct traditional measurements and create a new vernacular that includes engagement.”

— Paul Woolmington, Founding Partner, Naked Communications

- Emotions
- Trust
- Enjoyment and likeability of a medium and its advertising
- Negative feelings toward a medium and/or its advertising
- Consumer experiences and values
- Relevance
- Advertising clutter/advertising avoidance
- Quality of media content and/or the advertising creative

Exposure-based dimensions of engagement

When examining exposure-based dimensions of engagement—time spent and attentiveness—a general pattern begins to emerge:

- How, when, and where time is spent with a medium varies by medium
- Looking at time spent as a factor on its own does not show what is happening during that time, i.e., it does not take into account the effects of multitasking and concurrent media usage on consumer engagement
- Even within multitasking and concurrent media usage, foreground (primary focus) and background (secondary focus) attention must be considered

Time Spent with a Medium—When and Where

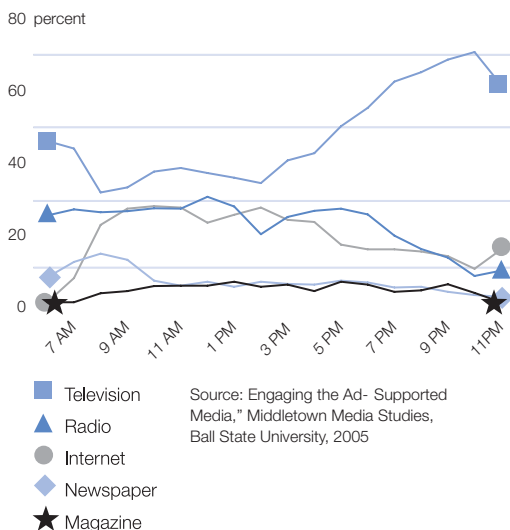
Measuring time spent with a medium is a fundamental component of looking at engagement—a consumer must spend time with a medium in order to experience its advertising. Ball State University’s Middletown Media Study, conducted in the summer of 2005 in two cities in Indiana, examined when (both by hour of the day and by day of the week), where and how consumers spend time with media. While this study represented just two cities for a specific period of time, its use of observational research supplied insights beyond those available in surveys.

When—Media Usage by Time of Day

Ball State University’s findings detailed how media access and exposure changed over the day. They reported that:

- Magazines were not an early morning medium, but maintained a low and steady incidence of exposure (approximately 5% of participants per hour) throughout the day
- Newspapers had greater incidence of exposure in the morning but then maintained a profile similar to magazines for the rest of the day
- Television was a source for morning news, as reflected in relatively high incidence in the early morning. Its incidence fell as newspaper

Incidence of Media Exposure
(by hour of the day)



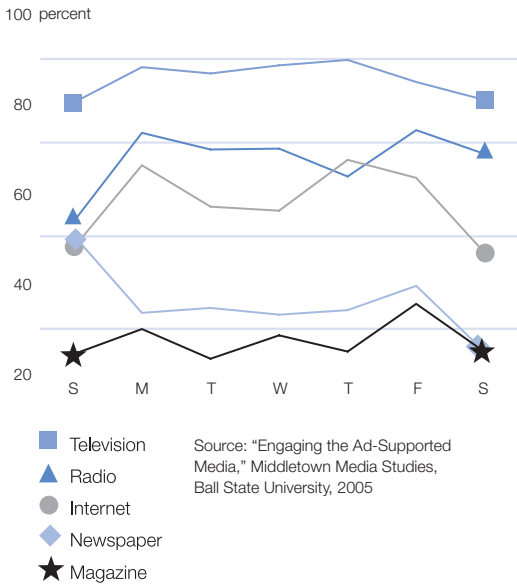
Source: Engaging the Ad- Supported Media,” Middletown Media Studies, Ball State University, 2005

reading increased from 8:00 a.m. to 9:00 a.m. Television's exposure incidence remained around 35% through mid-afternoon, then rose to a high of 70% in evening television viewing

- Radio maintained a relatively steady incidence of exposure through the day and declined in the evening

- The web exposure profile reflected high incidence of exposure in the morning

Incidence of Media Exposure
(by day of the week)



When—Media Usage by Day of the Week

Ball State University also looked at time spent with media across days of the week. Given the typical American work week with weekends reserved for personal activities, it is not surprising that some of the most apparent patterns of time spent with media reflected weekday versus weekend lifestyle differences.

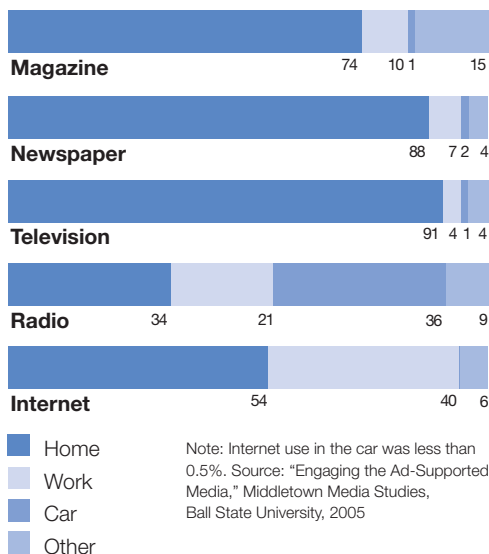
- Magazines had their highest incidence of exposure on Monday (29%) and Friday (35%)

- Newspapers peaked on Sunday (given the relative popularity of the Sunday edition), had steady incidence through the week (around 33%) and their lowest incidence of exposure on Saturday (24%)

- Television was also fairly steady through the week, with its lowest (80%) incidence of exposure on weekends

- As work-associated media, radio and web had their highest incidence during the week

Distribution of Time of Media Exposure by Location (percentage of exposure)



Where Consumers Use Media

Where one spends time with media also sheds light on engagement. Ball State University's work showed the distribution of total time of media exposure across locations.

- Magazines, newspapers and television were predominantly home-based media

- Magazines were the medium with the largest proportion of time of exposure spent in "other" locations

- Work was a key location for time spent with the Internet and, to a lesser extent, radio

Multitasking Media with Other Activities/Simultaneous Use of Media

Consumers are more time-pressed than ever. A national survey commissioned by MTV Networks found that Americans reported doing 5.8 more hours of activities than there are hours in the day.

Consequently, fewer activities—and media—receive the undivided attention of consumers.

“With so much choice and clutter, mere exposure to commercial messages is no longer enough unless we also engage the consumers at the point of exposure.”

— Richard Fielding and Judy Bahary, Starcom Worldwide

Evaluating media involvement must go beyond time spent with various media. It is critical to consider multitasking and concurrent media usage, factoring for background and foreground focus.

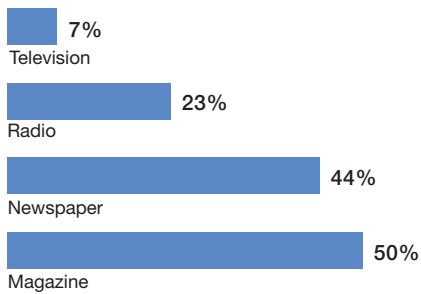
Multitasking and concurrent media use are complicated because media use and activities are not compartmentalized—consumer attention flows continuously from one to the other and back again. At any given moment, one activity will have more of a consumer’s attention than another.

A number of studies reveal information about how consumers use media, looking at:

- Media use while engaging in other activities, i.e., listening to the radio while preparing a meal
- Simultaneous/concurrent use of media, i.e., surfing the Internet while watching TV

Though the various studies approached multitasking using a range of methods, they came to similar conclusions.

Percentage engaging in no other activity while using medium



Source: MindShare MORe Panel, Adults 18+, October 2001 and February 2002

Multitasking: Media Use While Engaging in Other Activities

MindShare, BIGresearch and Ball State University have all studied media use that occurred simultaneously with any other activity. Despite different approaches, all support the contention that considering time spent by itself does not present the full story of engagement. All three found that multitasking rates varied greatly by medium. All showed that print media—magazines and newspapers—were much more likely to be the sole focus of consumers as compared to radio, TV and the Internet.

MindShare found that magazines and newspapers tended to be the least multitasked media. Half of consumers did not participate in any other activity when reading magazines. On the other hand, consumers multitasked during broadcast broadcast media—TV and radio—considerably more.

BIGresearch’s research on multitasking found that about two-thirds of consumers said they engaged in other activities while using TV (68%), online (69%) or radio (69%). Print media, specifically magazines and newspapers, on the other hand, were multitasked considerably less, as only four in ten consumers reported multitasking while reading magazines (40%) or newspapers (41%).

Percent who say they multitask media use and life activities

Online	69.3%
Radio	69.0
TV	68.1
Newspaper	40.9
Magazine	40.2

Base: U.S. Age 18+. Source: BIGresearch SIMM VI, 2005

Ball State University's observations provided an in-depth look at consumers' day-to-day life activities and media use. Their findings included:

■ Print media were multitasked the least with life activities. Thirty-two percent of newspaper minutes and about 40% of magazine minutes occurred during the same time as day-to-day life activities. About 10% of the time consumers were eating a meal while reading newspapers and magazines, making it the life activity most likely to coincide with using print media

■ Consumers were involved in life activities nearly half the time while watching TV (46% of minutes observed). For TV, the top three activities—eating meals, housework and work—were relatively equal, together occupying about 19% of the minutes when the TV set was on

■ Radio held its reputation as a classic background medium. Listening to the radio as an exclusive activity occurred only 24% of the time

■ Approximately 41% of time with the Internet was “media only.” Work was the predominant activity during Internet use

Distribution of Average Minutes of Media Exposure Across Life Activities (percent)

	Media Only	Work	Housework	Child Care	Services and Shopping	Meal Preparation	Meal Eating	Social Activities	Other	Average Total Exposure (in Minutes)
Newspaper	68%	5%	3%	2%	1%	1%	11%	3%	2%	12.2
Magazine	60	7	4	4	4	3	10	3	4	7.3
Television	54	6	6	3	1	5	7	6	6	240.9
Internet	41	40	2	2	0	1	3	3	4	67.4
Radio	24	26	5	3	5	2	4	8	5	80.0

Percentages may not sum to 100% due to “unknown” activity data. Source: “Engaging the Ad-Supported Media,” Middletown Media Studies, Ball State University, 2005

Simultaneous/Concurrent Use of Media

BIGresearch and Ball State University have both studied simultaneous/concurrent media use. BIGresearch found that online largely shared its time with other media, e.g., 38% of the time with TV. Magazine readers tended to use other media simultaneously less than users of other media.

Regular* Simultaneous Media Usage (percent of respondents)

Question: “When you (column), do you simultaneously ... regularly ... (row)?”

	Listen to radio	Watch television	Read magazine	Read newspaper	Go online
Listen to radio	NA%	3.8%	13.1%	14.3%	21.0%
Watch television	8.2	NA	18.9	23.6	37.7
Read magazine	8.8	9.6	NA	NA	6.8
Read newspaper	12.4	16.9	NA	NA	9.3
Go online	19.4	28.6	6.7	8.3	NA

*Regularly: Routinely, as a set pattern or 75% of one's time. Note: NA = Not applicable. Base: U.S. Age 18+. Source: BIGresearch SIMM VI, 2005

	Percent of Minutes of Concurrent Media Exposure	Percent of Minutes of Primary Exposure
Internet	79.9%	35.3%
Magazines	71.2	78.8
Newspaper	69.7	58.8
Radio	29.8	17.2
TV	28.5	14.6

Source: "Engaging the Ad-Supported Media," Middletown Media Studies, Ball State University, 2005

Ball State University's observation showed that media exposure may range from fully engaged attention (i.e., intent engrossment in a magazine article) to incidental exposure to a largely unnoticed medium (i.e., background presence of radio music while shopping at a retail store). When multiple media were used, print media were more likely to get primary focus. For example, while magazines ranked second in percent of time in which multiple media were used (behind the Internet), nearly 79% of the time they received primary attention. In contrast, TV, which had the least amount of time consumed along with other media, ranked last in percent of minutes of primary exposure during concurrent media use—less than 15%.

Ball State University's research pointed out that the amount and patterns of concurrent media exposure likely resulted from a number of factors, including:

- **Motivations and goals of the media user.** Consumers may choose to combine two or more media to gratify a particular need or accomplish a task (e.g., typing in a web address from a magazine to get more information about a product; browsing a newspaper in a dentist's office while the radio plays in the background)
- **Involuntary media exposure.** Consumers choose some, but not all, of their media exposure; in particular, they may be subjected to "environmental" media content in public places (restaurants and bars, retail settings, medical offices, etc.)
- **Frequency of a medium's use.** If a medium is used frequently throughout the day, even in short episodes, it is more likely to be paired with other media
- **Overall amount of use for various media.** The finite length of the day means that, as time spent with a medium increases, the more likely it is that a medium's use will overlap with use of other media
- **Space and time.** Media use, and consequently concurrent media exposure, varies by location and time of day
- **Personal and social characteristics of the consumer.** Age and gender, for example, play a role in overall patterns of media use; they are likely to influence patterns of concurrent media exposure as well
- **Complementary effect of media.** Potential media combinations vary in how well the sensory and cognitive demands of their content and channels harmonize (consider the contrast between reading a magazine and listening to the radio versus reading a magazine and playing a video game)

Qualitative dimensions of engagement

Qualitative dimensions have gained increasing attention in engagement research. Researchers have examined factors such as the role of emotions, consumers' media experiences and the relationship between the medium and the advertising in it to better understand how advertisers can potentially strengthen consumer response to advertising.

Emotions

Though difficult to quantify, emotions play a key part in consumer engagement. Traditionally, advertisers believed that consumers reacted to advertising in a fairly linear, logical manner.

Rational Model: How Consumers Process Advertising Messages

First Consumer absorbs the message

Second Consumer considers the information

Third Consumer takes action

Recent theory addresses the more complicated role that emotion plays in a consumer's processing of advertising. It recognizes both rational and emotional factors in how a consumer processes advertising messages. The March 2005 issue of *Journal of Advertising Research* reported, "Cognitive psychologists suggest that advertising information is acquired continuously from multiple sources, stored often subconsciously in the brain, and then assessed and assembled on demand by the individual."

Emotional Model: How Consumers Process Advertising Messages

First Advertising activates relevant frame of mind in the consumer

Second Advertising creates emotional response

Third Advertising fosters the creation of personally relevant stories and enriches the brand's messaging

Fourth Advertising interacts with prior experience in the mind and is enhanced by the surrounding context

Fifth Emotional response adds enrichment to brand meaning

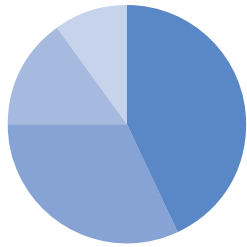
Source: "Measuring Emotional Response to Advertising," ARF/AAAA M14 Initiative, 2005

If emotional response is so complex, can it be succinctly defined? The 4As/ARF Emotional Response to Advertising Study defined emotion as "a positive or negative reaction to stimulus that causes a subjective response." This definition supports the idea that emotional engagement requires consumers to experience a subjective feeling in response to advertising.

"Seventy percent of the consideration/purchase/loyalty decision is emotionally based."

— Robert Passikoff, President, Brand Keys

Consumers usually trust and believe advertising in:



43% Magazines
32% Network TV
15% Cable TV
10% Internet

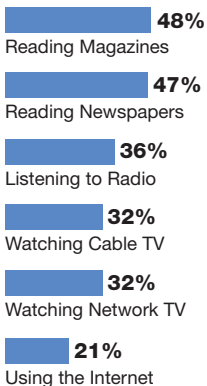
Source: Media Choices, 2000, Adults 18+

Teens and Advertising Trust by Medium

Magazine Advertising	29%
Radio Advertising	22
TV Advertising	22
Internet Advertising	18

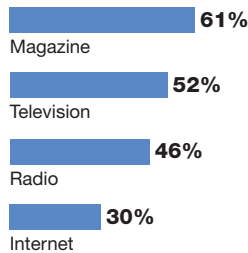
Source: Neopets Youth Study, 2004

Advertising adds to the enjoyment of the following:



Source: Roper Public Affairs, 2005

Very/somewhat positive attitude toward advertising:



Source: Dynamic Logic AdReaction 4, 2005

Trust

A general pattern emerges when it comes to consumers and the media they trust. As shown with both the Media Choices Study and the Neopets Youth Study, magazines are generally found to be the medium in which advertising is trusted the most. Internet advertising is trusted the least, with broadcast media trust levels falling between magazines and the Internet. Hearst Magazines’ Engagement Factor Study echoed this pattern.

Percent of Adults Age 18 to 54 Who Trust Ads in Medium

Magazine Advertising	21%
TV Commercials	12%
Internet/Online Advertising	7%

Source: Hearst Magazines’ Engagement Factor Study, 2005

Trust also emerged as an aspect of engagement when Northwestern University identified and ranked consumer experiences that motivate or inhibit media use. The research showed that trust ranked among the top ten experiences driving consumer use of magazines and the Internet. (See pages 16 to 20 for more on experiences.)

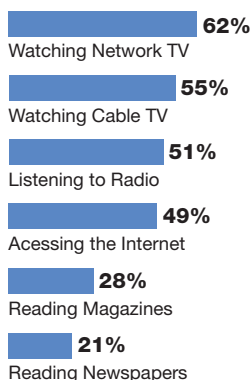
Enjoyment and Likeability of a Medium and Its Advertising

The Yankelovich MONITOR Omniplus Survey Marketing Receptivity Survey found that 55% of consumers indicated that they “enjoy advertising.” Surveys from Roper Public Affairs and Dynamic Logic showed that consumers’ positive feelings about advertising vary from medium to medium. In both, print advertising received the highest positive scores, while Internet advertising received the lowest.

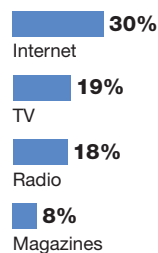
Condé Nast Publications’ recently released Point of Passion Study shed light on the differences among media and the role interruption plays in enjoyment. The study compared how magazines and television advertisements were perceived and processed by their audiences. The researchers used the Zaltman Metaphor Elicitation Technique (ZMET) methodology, which is grounded in the neuroscience of brain functions. ZMET uncovers the metaphors—or cognitive constructs—that guide consumer choices and behaviors through an innovative use of imagery and verbal response.

The researchers found that for magazine readers, advertising was part of the pleasure of the experience. However, the more avidly involved television viewers were in a TV program, the more likely they were to be annoyed by the commercial interruptions in the program and thus more likely to respond by turning to other activities such as channel zapping, multitasking, leaving the room or by simply not paying attention.

For which of the following would you say advertising gets in the way of your enjoying...?



Very/somewhat negative attitude toward advertising:



Source: Dynamic Logic AdReaction 4, 2005

Source: Roper Public Affairs, 2005

Not all findings regarding TV viewing and commercial avoidance have been consistent, i.e., some studies have found that greater involvement in TV leads to greater advertising exposure; others have indicated the opposite. However, overall research to date suggests that consumers feel most positive about and most enjoy advertising in media where advertising interrupts the least and consumers feel in control.

Annoyance and Negative Feelings

In addition to the Condé Nast Point of Passion Study, other research has shown that engagement is affected by negative emotions, such as annoyance or irritation. Surveys from Roper Public Affairs and Dynamic Logic recently showed that negative attitudes toward advertising varied by medium, with print advertising experiencing the least negativity.

Yankelovich MONITOR Omniplus Study's 2004 Marketing Resistance Survey found that consumers' negative opinions about marketing and advertising are growing.

- 60% agreed that their opinion of marketing and advertising has become much more negative than it was just a few years ago
- 61% felt that the amount of marketing and advertising has gotten out of control
- 70% said they tune out advertising more than they did just a few years ago

The study found that marketing and advertising affects the quality of life negatively for a significant number of consumers.

- 45% said that the amount of marketing and advertising they are exposed to detracted from their experience of everyday life
- 36% said that their shopping experiences were less enjoyable because of all the pressure to buy

Consumer Experiences and Values

Measuring consumer experiences, defined by Northwestern University as "what people think and feel when they use media," provides another way to assess engagement. The statements that consumers use to describe their experiences with media indicate the benefits (or motivators) and the detractors (or inhibitors) that affect their media usage. Findings across a variety of studies reveal that each medium elicits unique experiences, while there are experiences that are common among media.

Experience Research by Medium

The Scripps Network Viewer Engagement Study asked consumers aged 25 to 54 to indicate which attributes best described the broadcast and cable channels they watch. Overall, the study found that the attributes

Top Cable and Broadcast TV Attributes

Ranked by Percent Very/Somewhat Descriptive Adults 25-54; Average of 50 Networks

This channel is fun to watch	81%
This channel has shows you can't find anywhere else	79
This channel is appropriate for the whole family	75
This channel is one of your favorites	63
This channel provides information you can use	59
This channel is a trusted source of information	56
You'd hate to give this channel up	54
When you watch this channel you want other people in the room to be quiet	54
You always learn something new and different when you watch this channel	54
You make a special effort to set aside time to watch certain shows on this channel	47

Source: Scripps Network Viewer Engagement Study, 2005

Myers Emotional Connection Study Engagement Factors

Viewer Attitudes Toward Family Viewing Qualities	Top 3 Box Agreement Scores*
I am comfortable viewing this network with family and friends	66%
Viewer Engagement with TV Network Content	
I consider this network to be like a trusted friend that I rely on	38
This network is relevant to me and reflects my viewing habits	38
Once I tune into this network, I stay tuned without changing channels frequently	36
I am more likely to view this network/program frequently	34
Viewer Attentiveness to Advertising on Emerging and Midsized TV Networks	
This network has commercials that are interesting to me and I pay attention to them	22
When I see advertising on this network, I consider it a recommendation and am more likely to purchase the product or service being offered	20

*Box 5-7 on a seven-point scale. Base: 50 midsized, emerging networks. Source: Myers Emotional Connection Study, 2005

could be grouped to define four distinct ways in which viewers relate to the TV networks they watch:

- **Advertising receptivity**, which relates to the role that advertising plays in their viewing experience
- **Life enhancing**, which speaks to the role of personal relevance, aspiration and empowerment in TV viewing
- **Trusted source**, or credibility of the networks
- **“Near and dear” TV**, or attributes such as uniqueness or desirability that relate to the likelihood that a consumer will choose to view a network

Attributes centered around trust, life enhancing and “near and dear” figured most strongly for consumers, as evidenced by the top 10 attributes in the chart to the left.

The Myers Emotional Connection Study also measured TV’s engagement attributes, or consumer experiences. This study, which was initiated in 1999, now includes 50 midsized and emerging TV networks and measures seven attributes.

Although they looked at different age groups, the Scripps Network Viewer Engagement Study (adults 25 to 54) and the Myers Emotional Connection Study (adults 18+) both found that watching TV with family was one of the most important attributes for consumers. Loyalty and trust also figured among the highest ranked qualities in the Myers Emotional Connection Study.

The Newspaper Experience Study, Magazine Reader Experience Study and Online User Engagement Study from Northwestern University quantified what consumers experienced when they used these media and how those experiences drove or inhibited media usage. For magazines and online, Northwestern University also studied the effect of media experiences on advertising impact.

Northwestern University used a consumer-centric approach in these studies, conducting personal, in-depth interviews to establish distinct experiences for each medium in the consumers’ own language. Consumers used different language to talk about their experiences in each medium, so that similar experiences across the media were described in different ways. The qualitative experiences were then quantified by asking consumers to indicate their level of agreement with each attribute for a specific media vehicle used.

Usage was based on a statistical analysis of questions on time spent with the specific vehicle, frequency of exposure, etc., that were asked independently of the experience-related questions. The correlation of experiences to usage revealed a richness and depth of emotion about what motivated consumers’ media use.

Certain characteristics, such as learning and routine, were common across all three media. However, Northwestern University also found variance among the top motivating experiences across newspapers, magazines and the Internet.

Top 10 Experiences That Motivated Media Usage

Newspaper	Magazine	Online
Enjoy reading	I get value for my time and money	Entertains and absorbs me
Looks out for my civic and personal interests	It makes me smarter	Looks out for people like me
Makes me smarter	It's my personal time-out	Regular part of my day
Regular part of my day	I often reflect on it	My personal time-out
People I know	The stories absorb me	A credible, safe place
Something to talk about	I learn things first here	Connects me with others
Touches and inspires me	It's part of my routine	Touches me and expands my views
I connect with writers	I find the magazine high quality and sophisticated	Makes me smarter
High-quality content	I trust it	Turned on by the ads
Good service	I feel good when I read it	Easy to use

Source: Northwestern University Readership Institute Experience Study, 2003

Source: Northwestern University Media Management Center Reader Experience Study, 2003

Source: Northwestern University User Engagement Study, 2005

The Northwestern University Reader Experience Study compared the top 10 experiences that drove magazine reading and the top 10 experiences that drove magazine advertising impact. Only two of the top 10 motivating experiences differed for advertising impact—"I like some ads a lot" and "It improves me and helps me try new things"—which suggests that positive effects from reader experiences may carry over to advertising impact.

Top 10 Drivers of Magazine Advertising Impact

1 The stories absorb me	6 I trust it
2 I like some ads a lot	7 I learn things here first
3 I find magazine high quality and sophisticated	8 It improves me and helps me try new things
4 I often reflect on it	9 I feel good when I read it
5 It makes me smarter	10 It's my personal time-out

Source: Northwestern University's Reader Experience Study, 2003

Cross-Media Experience Research

A Dutch study presented at the 2005 Worldwide Readership Research Symposium entitled "Media Experience and Advertising Experience: Application of a Multimedia Research Tool" looked at experiences across media. The researchers isolated and ranked eight distinct experiences, as defined in the Definitions of Media Experiences chart (see next page). Many of the experiences measured across media were similar to those used in the studies on individual media noted previously.

Definitions of Media Experiences

Identification

- I recognized myself in it
- I felt involved in it
- I empathized with it
- Showed me how I could approach problems

Information

- Offered me something new
- Gave me useful information
- Gave me credible information
- Taught me about what is going on in the world
- Enabled me to gain knowledge of the opinions of others
- Helped me in forming an opinion

Transformation

- Gave me enjoyment
- Made me cheerful
- Gave me a pleasant feeling
- Gave me a satisfied feeling
- Made me forget everything for a moment
- Was relaxing
- Was suitable for a moment by myself

Emotion

- Irritated me
- Was rather unclear
- Disturbed me
- Made me sad

Pastime

- Filled an empty moment

Stimulation

- Excited me
- Made me curious
- Made me enthusiastic
- Fascinated me
- Was original and unique

Social Relationships

- Provided subjects of conversation

Practical Use

- Provided me with useful ideas
- Motivated me to cut something out/phone/visit a shop

Source: "Media Experience and Advertising Experience: Application of a Multimedia Research Tool," Bronner, van Velthoven, and Kuijpers, 2005

The Media Experience and Advertising Experience Study showed that:

- Television's highest rankings were in identification, social relationships and emotion, while it received relatively low rankings for information and practical use

- Transformation was highest for radio; radio received more "4s" and "5s" than any other medium

- Newspapers ranked highest for information, emotion and social relationships and lowest for transformation

- Magazines ranked high for identification, pastime, and stimulation and was the only medium with no "4s" or "5s"

- The Internet ranked highest for practical use and lowest for emotion and pastime

Rank Positions of Paid Media on Experience Factors

	Magazines	Newspapers	TV	Radio	Internet
Identification	1	3	2	5	4
Information	2	1	4	5	3
Transformation	2	5	3	1	4
Emotion	3	1	2	3	5
Pastime	1	2	3	3	5
Stimulation	1	4	3	5	2
Social Relationships	3	1	2	5	4
Practical Use	2	3	5	4	1

Source: "Media Experience and Advertising Experience: Application of a Multimedia Research Tool," Bronner, van Velthoven, and Kuijpers, 2005

Mediamark Research Inc. (MRI) has also asked about the role media play in consumers' lives. Their data showed that magazines, TV, newspapers and the Internet were valued for their ability to provide knowledge-oriented experiences, although they played different roles in doing so. TV and radio ranked highest as sources of enjoyment. A relatively small percentage of consumers turned to newspapers and the Internet for good mood and relaxation (see next page for chart).

MRI data also showed that when consumers were asked about engagement with advertising as compared to engagement with a medium, a different picture emerged. Positive and negative drivers in advertising varied from one medium to another. For example:

- Magazines, newspapers and TV scored high for a number of positive drivers for advertising, especially for providing information about new products and services

Consumer Experiences Across Media

Knowledge	Magazines	TV	Radio	Newspapers	Internet
A good source of learning	56.9	64.9	34.1	66.2	62.5
Gives me good ideas	64.1	53.5	24.2	33.9	44.5
Keeps me informed/up to date	31.2	72.0	51.1	70.0	39.0
Keeps me up to date with latest styles and trends	69.2	61.6	15.0	27.4	25.6
Makes me think	47.2	50.5	32.2	63.8	40.1

Enjoyment

A good escape	38.9	71.7	38.2	12.4	34.4
Pure entertainment	30.4	84.7	50.5	10.9	22.2
Puts me in a good mood	25.4	54.0	63.0	8.2	16.4
Relaxes me	32.2	63.5	55.4	14.3	16.9

Base: US age 18+. Source: 2005 MRI Spring Weighted by: Population. Copyright © 2005 MRI All rights reserved.

■ TV ads ranked relatively high for “amusing” and “funny,” while newspapers’ strength lay in providing information about bargains

■ Consumers found attributes of advertising “clutter” in TV, radio and Internet particularly negative, as shown by the high percentage that found ads repeated too often and at inconvenient moments in these media. When looking at negative drivers for advertising, print media fared better

Consumer Experiences with Advertising

Positive Drivers	Magazines	TV	Radio	Newspapers	Internet
Ads provide information about product use of other consumers	39.1	39.6	30.8	41.9	20.3
Ads provide useful information about new products/services	50.6	56.2	39.9	52.3	24.9
Ads provide useful information about bargains	41.2	47.0	40.1	67.4	23.0
Ads are amusing	19.6	46.3	29.8	14.8	15.4
Advertising is funny	17.4	45.2	29.1	13.7	14.1

Negative Drivers

Ads appear at inconvenient moments	16.8	52.9	35.2	13.0	49.2
Ads are repeated too often	24.7	63.5	46.7	17.5	47.4
Ads are too loud	11.6	49.5	30.9	9.8	28.7
Ads have no credibility	14.4	29.9	21.4	12.5	33.6
All ads are alike	20.4	28.3	26.0	18.5	32.1

Base: US age 18+. Source: 2005 MRI Spring Weighted by: Population. Copyright © 2005 MRI All rights reserved.

Relevance

Relevance can be defined as the “fit” between:

- Advertising message and the consumer
- Advertising and the media environment

Overall, relevance speaks to the importance of targeting as a factor of engagement.

Percent agree that “Most of the ads are geared toward the audience involved with the medium”

Magazine Advertising	60%
TV Commercials	38
Internet/Online Advertising	28

Source: Hearst Magazines’ Engagement Factor Study, 2005

“Engagement is all about making it relevant to the consumer.”

— James Speros, Chief Marketing Officer, Ernst & Young

Relevance Between Message and the Consumer

The 2004 Yankelovich MONITOR OmniPlus study on marketing resistance found that 59% of consumers say that most marketing and advertising has very little relevance to them. Hearst Magazines’ Engagement Factor Study, which looked at adults aged 18 to 54, found that relevance of magazine advertising was more than double that of the Internet and more than 50% that of TV.

Media analyst Erwin Ephron of Ephron, Papazian & Ephron recently documented relevance for consumers in TV and magazines, by looking at the composition of product users within the audience of each medium.

Ephron analyzed MRI data, examining five heavily advertised TV brands for each of six product categories. Each brand also used magazines. The analysis was based on a month of TV and a month of magazine advertising activity for each brand. He compared each medium’s product user index for the product category as shown by MRI. (MRI was used for both TV and magazines because Nielsen ratings do not measure products.)

In examining the likelihood that the audience of each medium used a product, Ephron noted, “Even for these predominantly TV brands, their print schedules are more relevant to readers than their TV schedules are to viewers. The magazine advantage ranges from +17% for a major SUV brand to +49% for a heavily advertised MP3 player.” Ephron concluded that “magazines give the reader control, which makes the advertising more welcome. And magazines target readers, which makes the advertising more relevant.”

Comparison of TV and Magazine Product Users by Brand

Brand*	TV Product User Index	Magazine Product User index	Percent Difference
SUV	118	138	+17
Coffee	101	123	+23
Tampons	134	186	+39
Financial	140	165	+18
Men’s Razor	114	142	+24
MP3 Player	133	198	+49

*Single brand used within category. Source: MRI and TNS/Media Intelligence, 2004

Percent agree that “Most of the ads are related to the content of the medium”

Magazine Advertising	43%
Internet/Online Advertising	22
TV Commercials	14

Source: Hearst Magazines’ Engagement Factor Study, 2005

“Clutter is the only area in which every single study agrees. Clutter is a bad thing. As an advertiser I don’t want to do something that hurts my commercial impact.”

— Debbie Solomon, Senior Partner and Research Director, Mindshare

Relevance Between Message and Media Environment

Studies that assess the fit between the advertising message and the media environment also find differences among media. When consumers aged 18 to 54 were asked which medium’s advertising was most related to its content in the Hearst Magazines’ Engagement Factor Study, magazine advertising’s relevance was two times that of the Internet and three times that of TV.

Hearst Magazines’ Engagement Factor Study reinforced Starcom’s earlier work about the relevance of magazine advertising. Starcom asked participants to pull out 10 pages of a magazine that represented its “essence.” One third of the pages chosen were advertisements, indicating that the advertising in magazines was considered relevant and a valued part of magazine content.

Findings from Affinity—though limited to one category within one medium—demonstrated the importance of targeting and relevance by looking at advertising recall, brand association and action-taking.

Affinity compared the recall of a number of ads tailored specifically for golf magazines with the recall for broader creative for the same campaigns. The examples of Mastercard and Rolex demonstrated the incremental effectiveness of ads when their creative design and messaging platforms were customized for the target audience.

Relationship of Targeting Advertising Recall

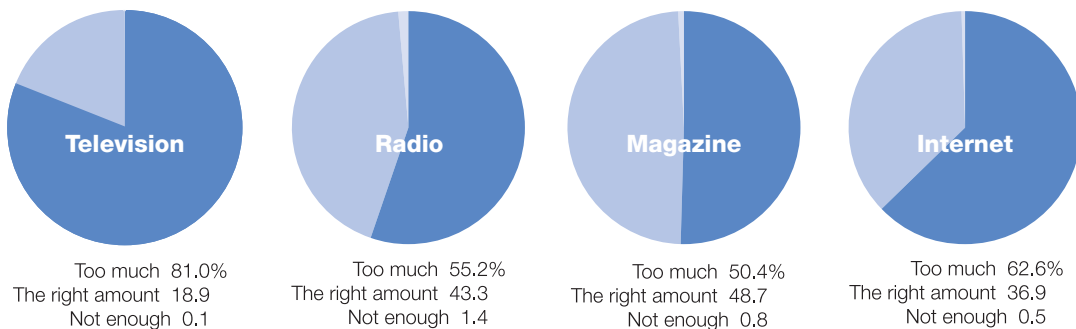
	Mastercard		Rolex	
	Average Recall	Index vs. Category	Average Recall	Index vs. Category
Category Norm	*42%	100	**53%	100
Broader Creative	45%	107	43%	81
Golf Genre Creative	67%	160	65%	127

*Finance and Insurance. **Fine Jewelry. Source: Affinity, Fine Print First Quarter, 2005

Advertising Clutter/Advertising Avoidance

Ad clutter can increase negative response to advertising. Consumers reported finding too much advertising, particularly in TV and the Internet, according to data from Mindshare Online Research (MORE).

Consumers Perceptions About the Amount of Advertisings in Different Media



Source: MindShare Online Research (MORE), U.S. Adult Wave 6, 2004

Yankelovich MONITOR Omniplus Study's Marketing Receptivity Survey revealed that more than half of all consumers actively try to avoid advertising.

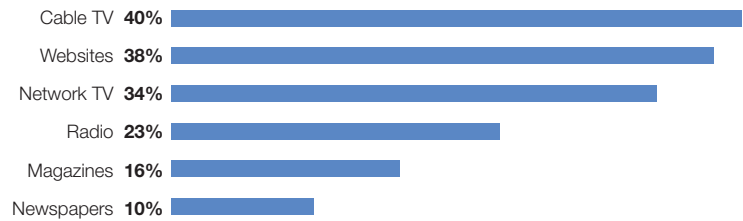
- 54% of consumers agreed that they try to resist being exposed to or even paying attention to marketing and advertising
- 69% said that they are interested in products that enable them to block, skip or opt out of being exposed to marketing and advertising
- 56% said that they avoid buying products that overwhelm them with marketing and advertising

Hearst Magazines' Engagement Factor Study and Yankelovich have looked across media at consumers' advertising avoidance. Their studies found that the media with the most clutter as noted in the Mindshare survey (TV and the Internet) were also the media in which consumers were most likely to avoid advertising and support eliminating ads.

	Percent likely to avoid ads in medium	Percent that support eliminating ads in medium
Internet/Online	65%	47%
TV	49	30
Magazine	38	19

Source: Hearst Magazines' Engagement Factor Study, 2005

Places you would be in support of eliminating advertising



Source: Yankelovich Omniplus, 2004

Exploring segmentation within engagement

A growing body of research has examined how engagement factors vary across segments, including:

- Demographics—ethnicity, age, gender and household income
- Product categories
- Properties within each medium

Although more segmentation research has been published about magazines than any other medium thus far, all data suggest that engagement varies among many segments measured.

Demographic Segmentation

Segmentation by Gender

Northwestern University's Reader Experience Study revealed that top reader experiences that drove or inhibited magazine use differed for men and women. While several experiences appeared among the top 10 usage drivers for both groups, the rank order for the common experiences varied, and other experiences in the top 10 were unique to each gender.

Top 10 Experiences That Drove Magazine Use

Males	Females
I get value for my time and money	I get value for my time and money
It makes me smarter	It makes me smarter
The stories absorb me	It's my personal time-out
I learn things first here	I feel good when I read it
I often reflect on it	The stories absorb me
It's my personal time-out	It's part of my routine
It's relevant and useful to me	I often reflect on it
I trust it	I learn things first here
I build relationships by talking about and sharing it	I find the magazine high quality and sophisticated
It's part of my routine	I build relationships by talking about and sharing it

Note: Experiences unique for each gender in the top 10 are bolded.

Source: Northwestern University Media Management Center Reader Experience Study, 2003

MRI data also revealed that while there were many similarities between men in women in their views toward advertising, there were also some differences between the two genders.

Men and women's similar views toward advertising included:

- A high proportion found that TV and Internet advertising appeared at inconvenient moments and were repeated too often
- A relatively low proportion of both genders found advertising in magazines or newspapers intrusive

Comparison of Views Toward Advertising by Gender

Positive Drivers	Magazines		TV		Radio		Newspapers		Internet	
	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women
Ads provide information about product use of other consumers	36%	42%	38%	41%	30%	31%	40%	43%	19%	21%
Ads provide useful information about new products/services	47	54	55	58	39	41	49	55	24	25
Ads provide useful information about bargains	38	44	44	50	39	41	63	71	23	23
Advertising is funny	17	18	45	45	29	29	13	14	14	14
Ads are amusing	19	20	46	46	30	30	14	15	15	16
Negative Drivers										
Ads appear at inconvenient moments	16	17	53	53	35	35	13	13	49	50
Ads are repeated too often	23	26	61	66	46	48	17	18	47	47
Ads are too loud	11	12	49	50	31	31	10	10	29	29
Ads have no credibility	14	15	30	30	21	22	13	13	34	34
All ads are alike	20	21	28	29	25	27	18	19	32	32

Note: Bold indicate 5 or more point difference. Base: U.S. Age 18+. Source: 2005 MRI Spring Weighted by: Population. Copyright © 2005 MRI All rights reserved.

Ways in which the genders differed in their views toward advertising in various media included:

- A larger proportion of women found TV, magazine and newspaper advertising a useful source for information on bargains than men
- A larger proportion of women found that magazine and newspaper advertising provide useful information

Segmentation by Age

Both exposure and qualitative factors of engagement vary by age. For exposure, teens appeared to be the age group most likely to multitask, while older respondents tended to focus on one medium more than others, according to Media Head's analysis of BIGresearch data.

Multitasking by Age Group	Teens	18-24	25-34	35-44
To one medium more than the other(s)	57%	68%	71%	71%
Equally to each medium	43	32	29	29

Source: Reaching Teens: Simultaneous Media Usage Increases the Challenge, Media Head, 2005, BIGresearch

A compilation of individual magazine data from Monroe Mendelsohn Research, Inc.'s 2004 Publication Readership Satisfaction Survey (PReSS), offered insights into how different age groups rated various attributes, including:

- Younger readers tended to rate their magazines more highly than older readers
- Readers aged 55+ were more likely to rate a magazine they read as "differs from other publications of the same type"

Relative Likelihood of Magazine Readers to Strongly Agree with Various Descriptions/Evaluations of Individual Publication by Age (Index)

	18-24	25-34	35-44	45-54	55-64	65+
Overall rated excellent	112	109	100	100	97	81
Differs from other publications of the same type	101	93	97	97	106	110
Look forward to every issue	101	111	91	94	101	106
Enjoyable to read	120	108	101	93	92	90
Has eye-catching covers	111	119	92	105	96	75
Entertaining	122	103	105	96	99	75
Cutting-edge	112	115	101	98	97	77
Informative	115	111	91	101	104	82
Authoritative	119	102	113	102	101	97
Quality photos and illustrations	119	114	99	97	101	73
Has useful ads	123	114	97	93	94	87
Has attention-getting ads	119	129	91	90	92	84
Contains ads I trust	124	106	108	96	94	75

Note: Base is adult readers of 199 publications. This table reads as follows: on average (all 199 publications studied), adult readers aged 18-24 were 12% more likely than all adult readers to rate the publication "excellent" (112 index). Source: Magazine Dimensions 2006. Media Dynamics, Inc. estimates of Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2004

Segmentation by Household Income

Levels of income also seem to be a factor in engagement. MRI data showed that there were many similarities between affluent and lower income consumers in advertising drivers by medium. However, some differences between the two income segments came to light as well.

Similarities in how the affluent and lower income consumers viewed advertising included:

- A significant proportion perceived advertising in magazines, television and newspapers as sources of useful information about new products and services
- A relatively high proportion viewed advertising in television, radio and Internet as having one or more negative drivers (such as inconvenient, too often, too loud, no credibility, and/or all alike)
- A relatively low proportion found these same negative drivers in magazine or newspaper advertising

However, there were differences between the affluent and low income consumers in advertising drivers by medium, such as:

- Overall, the affluent were less inclined than lower income consumers to consider TV and Internet advertising as providers of information about other consumers' product usage
- The affluent were less inclined to perceive television ads as providing useful information about bargains (42% of affluent versus 50% of lower income)
- An affluent consumer was much more likely than a lower income consumer to find Internet advertising to be negative (e.g., 61% of the affluent found that Internet ads appeared at inconvenient moments compared to 42% of lower income consumers)

Comparison of Views Toward Advertising by Household Income

Positive Drivers	Magazines		TV		Radio		Newspapers		Internet	
	<\$50k	\$100k+	<\$50k	\$100k+	<\$50k	\$100k+	<\$50k	\$100k+	<\$50k	\$100k+
Ads provide information about product use of other consumers	40%	38%	43%	35%	33%	29%	43%	40%	22%	17%
Ads provide useful information about new products/services	50	51	57	55	40	40	52	51	26	22
Ads provide useful information about bargains	43	38	50	42	41	39	66	68	24	22
Advertising is funny	20	15	46	44	31	27	17	10	16	12
Ads are amusing	22	17	48	46	31	29	18	11	18	13
Negative Drivers										
Ads appear at inconvenient moments	19	15	52	55	34	38	16	11	42	61
Ads are repeated too often	25	24	63	66	45	50	19	17	42	57
Ads are too loud	13	10	48	53	30	33	11	8	25	35
Ads have no credibility	16	13	31	29	21	23	14	11	29	41
All ads are alike	21	20	29	28	26	28	20	18	29	40

Note: Bold indicate 5 or more point difference. Base: U.S. Age 18+. Source: 2005 MRI Spring Weighted by: Population. Copyright © 2005 MRI All rights reserved.

The PReSS survey revealed differences among various reader segments by household income on how they rated magazine attributes. Readers with the highest household incomes were far more likely to positively rate the publications they read across nearly every attribute than readers with the lowest household incomes.

Relative Likelihood of Magazine Readers to Strongly Agree with Various Descriptions/Evaluations of the Publication by Household Income (Index)

	<\$25K	\$25–49.9K	\$50–74.9K	\$75–99.9K	\$100–149.9K	\$150K+
Overall rated excellent	81	104	99	106	103	139
Differs from other publications of the same type	105	125	108	70	71	84
Look forward to every issue	97	113	97	92	92	109
Enjoyable to read	88	104	103	105	92	121
Has eye-catching covers	85	96	100	103	108	144
Entertaining	81	101	92	119	105	133
Cutting-edge	81	108	89	118	95	141
Informative	78	100	96	114	113	136
Authoritative	80	101	101	107	112	126
Quality photos and illustrations	82	108	92	105	102	140
Has useful ads	96	106	100	95	95	114
Has attention-getting ads	99	101	88	111	92	130
Contains ads I trust	83	100	107	119	98	106

Note: Base is adult readers of 199 publications. This table reads as follows: on average (all 199 publications studied), adult readers with household incomes of \$150,000+ were 44% more likely than all adult readers to strongly agree that the publication has eye catching covers (144 index). Source: Magazine Dimensions 2006. Media Dynamics, Inc. estimates of Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2004

Segmentation by Ethnicity

Specific demographic segments respond differently to advertising. For example, the Simmons NCS/NHCS Spring 2005 Unified Study revealed that Hispanic adults are 20% more likely than the general market to be receptive to advertising.

Advertising Receptivity



Base: U.S. Adults Age 18+
Source: Simmons NCS/NHCS Spring Unified Study, 2005

When Northwestern University's Reader Experience Study looked at the experiences that drove magazine use, they found that African-American and Hispanic top-ranked experiences varied from those of the general population.

Top 10 Experiences That Drove Magazine Use

All Adults	African-American Adults	Hispanic Adults
I get value for my time and money	It makes me smarter	It makes me smarter
It makes me smarter	I get value for my time and money	I get value for my time and money
It's my personal time-out	The stories absorb me	The stories absorb me
I often reflect on it	I build relationships by talking about and sharing it	I feel good when I read it
The stories absorb me	I'm touched	I learn things first here
I learn things first here	It grabs me visually	It improves me and helps me try new things
It's part of my routine	It's relevant and useful to me	I think others in the household would enjoy the magazine
I find the magazine high quality and sophisticated	I get a sense of place	It's relevant and useful to me
I trust it	I think others in the household would enjoy the magazine	I often reflect on it
I feel good when I read it	I find unique and surprising things	I find the magazine high quality and sophisticated

Note: The bolded experiences were unique to that segments top 10 listing. Source: Northwestern University Media Management Center Reader Experience Study, 2003

Segmentation by Product Categories

The media that influence purchase behavior vary by product category, according to advertising agency Media Head's analysis of BIGresearch data. When they examined media influence across age groups for different

Specific Media That Influence Purchase by Age Segment by Category

Electronics Purchases

Top Five Choices	% of Teens	% of Age 18-24	% of Age 25-34
Magazines	45%	Word of Mouth 46%	Word of Mouth 47%
TV/Broadcast	42	Magazines 40	Read Article 39
Internet Advertising	41	Read Article 39	Magazines 34
Word of Mouth	40	Internet Advertising 37	TV/Broadcast 31
Cable TV	31	TV/Broadcast 37	Internet Advertising 29

Bottom Five Choices	% of Teens	% of Age 18-24	% of Age 25-34
Newspaper Inserts	19%	Instant Messaging 13%	Outdoor Billboards 6%
Outdoor Billboards	19	Outdoor Billboards 12	Blogging 6
Blogging	13	Blogging 10	Instant Messaging 6
Picture Phone	13	Yellow Pages 8	Yellow Pages 5
Yellow Pages	11	Picture Phone 7	Picture Phone 3

Source: BIGresearch, "Reaching Teens, Simultaneous Media Usage Increases the Challenge," Media Head, 2005 (More research on product category differentiation can be found on page 33 in "Linking Engagement to Accountability.")

Specific Media That Influence Purchase by Age Segment by Category

Apparel/Clothing Purchases

Top Five Choices	% of Teens	% of Age 18–24	% of Age 25–34
Magazines	34%	Word of Mouth 37%	Word of Mouth 33%
Word of Mouth	28	Magazines 31	Magazines 26
TV/Billboard	25	TV/Billboard 26	In-store Promotion 25
Cable TV	17	In-store Promotion 24	TV/Billboard 24
Internet Advertising	17	Coupons 18	Cable TV 14

Bottom Five Choices	% of Teens	% of Age 18–24	% of Age 25–34
E-mail Advertising	11%	Radio 10%	Radio 6%
Newspaper	11	Instant Messaging 6	Blogging 3
Blogging	7	Blogging 6	Instant Messaging 2
Yellow Pages	6	Yellow Pages 5	Yellow Pages 2
Picture Phone	5	Picture Phone 5	Picture Phone 2

Source: BIGresearch, "Reaching Teens, Simultaneous Media Usage Increases the Challenge," Media Head, 2005 (More research on product category differentiation can be found on page 30 in "Linking Engagement to Accountability.")

product categories and by age group within each category, variations in influence were seen, such as:

■ While cable TV was among the top five most commonly cited media that influence apparel purchases among adults age 25 to 34, it failed to make the top five among this same age group for purchases in the electronics category.

■ While Internet advertising managed to make the top five media among teens in the influence of both apparel and electronics purchases, a much higher proportion of teens were influenced by Internet advertising for their electronics purchases (41%) than for their apparel purchases (17%).

Segmentation Within Each Medium

Consumers also rate vehicles and genres within a medium differently, based on studies for magazines and TV.

The PReSS Survey showed that for each attribute examined, there was a range of response among the 199 publications studied. For example, "Is enjoyable to read" ratings went from a low of 72% agreement to a high of 100% agreement, with a median of 94. The median shows that the vast majority found magazines enjoyable, while the range of 72 to 100 indicates the variation between the highest and lowest ranking publications.

As with the PReSS survey, the Myers Emotional Connections Study also showed a range of feelings toward cable TV when they measured seven key attributes of 50 midsized and emerging cable networks. (See next page for chart.)

Percent of Readers Agreeing with Publications' Attributes

	Median Rating	Highest Rating	Lowest Rating
	Agree Strongly/Somewhat		
Uniqueness/Engagement Attributes			
Differs from other publications of the same type	81%	98%	48%
I look forward to reading every issue	78	96	39
Is enjoyable to read	94	100	72
Editorial Attributes			
Is entertaining	93	100	68
Is cutting-edge	83	98	51
Is informative	95	100	66
Is authoritative	88	99	49
Visual Attributes			
Has eye-catching covers	92	99	46
Has quality photos/illustrations	94	100	45
Advertising Attributes			
Contains useful ads	86	99	45
Contains attention-getting ads	85	97	44
Contains ads that I trust	85	100	44

Base: Adult readers of 199 publications. Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2004

Percent of Viewers Agreeing with Networks' Attributes

	Median Rating	Highest Rating	Lowest Rating
Agree Strongly/Somewhat			
Viewer Emotional Commitment			
I am comfortable viewing this network/program with family and friends	66%	81%	43%
Viewer Engagement with Network or Program			
I consider this network/program to be like a trusted friend that I rely on	39	65	23
This network/program is relevant to me and reflects my viewing habits	39	61	24
Once I tune into this network/program, I stay tuned without changing channels frequently	36	57	15
I view this network frequently	35	48	20
Viewer Attentiveness to Advertising on Emerging and Midsized TV Networks			
This network/program has commercials that are interesting to me and I pay attention to them	22	41	12
When I see advertising on this network/program, I consider it a recommendation and am more likely to purchase the product or service being offered	20	44	11

Base: 4,000 adults rating 50 midsized and emerging cable/satellite networks in the top 3 box (5-7) on a seven-point scale. Source: Jack Myers Media Business Report Emotional Connections Study, 2005

Linking engagement to accountability

Engagement research is moving beyond ranking attributes of various media to showing how engagement links to results. Researchers are examining factors that led to results, such as:

- How mindset affects ad awareness
- The role of brand and media equity
- The relationship between attention to advertising and inclination to purchase
- The effects of creative on advertising recall

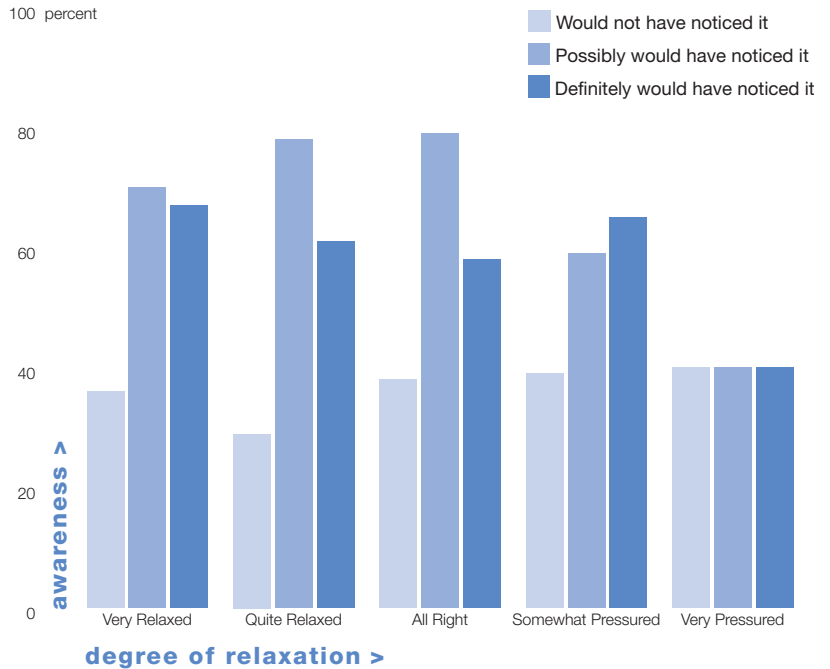
In general, the research showed that higher engagement produced stronger results and that results were driven by multiple factors.

The Effect of Mindset on Advertising Awareness

MindShare in the United Kingdom found that that consumer mindset correlates to advertising awareness. Their research showed that:

- Higher relaxation tended to result in higher awareness
- More pressured consumers tended to have lower levels of ad awareness

Mood vs. Awareness (all media average)

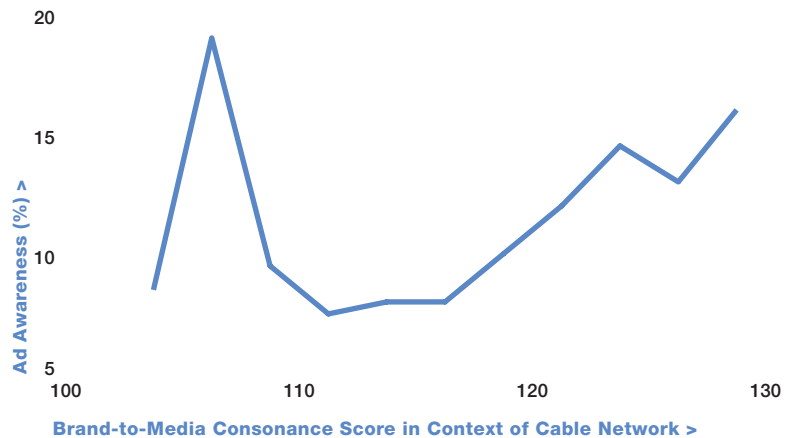


Note: MindShare looked at individual media but exact results remain proprietary. Data are approximations.
Source: MindShare MindSet Global Database, "Planning Print in a Multichannel World," 2005

Brand Equity and Media Equity: Predicting Advertising Awareness

Research firm Brand Keys looked at the "fit" between media brands' and product brands' equities to relate engagement to awareness for cable TV. Based on proprietary criteria, the results showed that—while there were exceptions—marketers could generally predict advertising awareness by relating brand equity values with media equity values. In this case, the exception was driven by a specific show—"Oprah"—that was aired on a cable network.

Brand Equity Score in Context of Cable Networks vs. Ad Awareness

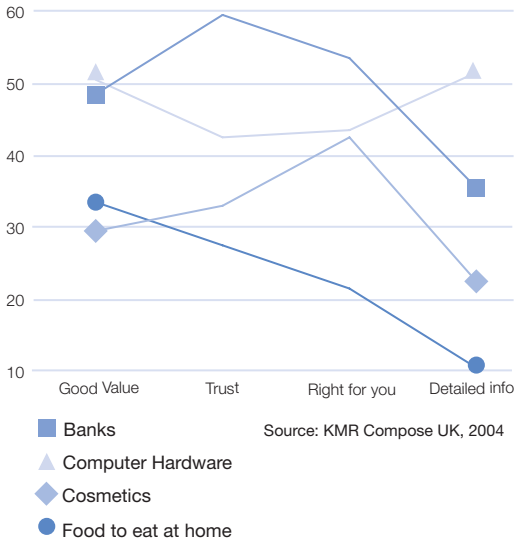


Source: Brand Keys, 2005

Brand or Medium Equity: The degree to which a brand or medium meets or exceeds a consumer's expectations for a category in which it competes.

Source: Brand Keys, 2005

Respondents evaluating selected traits as “very important” (%)



MindShare in the United Kingdom also looked at brand and media equity in creating channel-neutral plans that related the attributes that consumers gave to various product categories to those given to different media. They found that the marketing traits that were important to consumers varied by product category. For example:

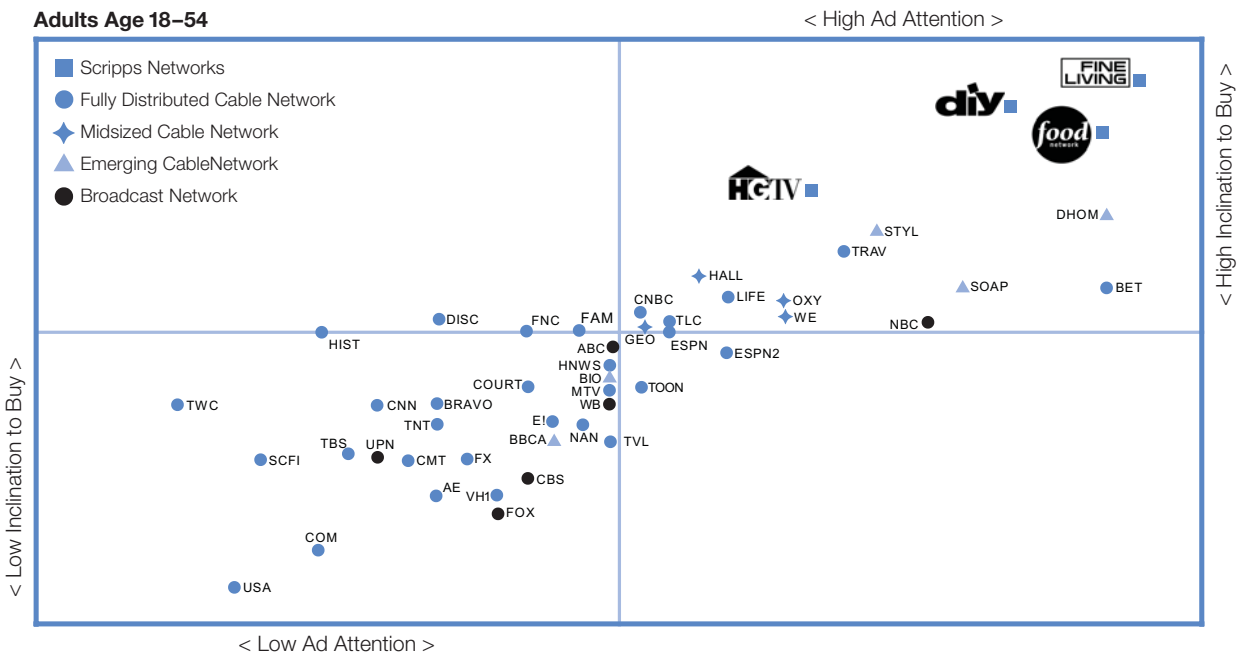
- Consumers responded that “trust” was more important than “good value,” “right for you” or “detailed info” when it came to making purchasing decisions about banks
- “Good value” was the most important trait for food brands
- Computer brands, on the other hand, were valued for their “good value” and “detailed info”

Once traits were established for various product categories, MindShare went on to assess each medium’s relative strength along various attributes using syndicated research. Then, using a process similar to that of Brand Keys, they selected media for each brand based on the “fit” between traits for the brand category and those for each medium.

Relationship Between Attention to Advertising and Purchase Inclination

The Scripps Network Viewer Engagement Study found that engagement affects purchase intent. Their research showed that lower attention levels were more likely to result in a lower inclination to buy and higher advertising attention levels were more likely to result in a higher inclination to buy.

Pay Attention to Advertising vs. Inclined to Buy Products Advertised



Source: 2005 Scripps Networks Viewer Engagement Study, Simmons Market Research phone survey of 1,740 Adults Age 18-54, Fall 2004 National Consumer Survey participants, conducted 12/13/04–1/23/05. Responses represent weekly or more viewers of specific network. Scatter plots are a graphical illustration represented by indices cross-tab attribute pairings from viewer engagement output fields.

“To sensibly include engagement in planning we have to combine media research, which measures the size and nature of the audience, with creative research, which measures response to specific brand advertising.”

— Erwin Ephron, Ephron, Papazian and Ephron

Meredith Corporation/Knowledge Networks/FCB Study Definitions

Involvement

- Any actions taken
- Page exposure >0.74
- Read away from home only
- Obtained from newsstand
- Number of reading days
- Amount of reading time (in minutes)
- Magazine likeability rating (top box)
- Read x issues out of 4 > 2 years

Category Participation

- Purchased/used product category within the last six months
- Intend to purchase or use

Magazine Exposure Frequency

- Ad exposure frequency

Other Magazine Characteristics

- Positioning in the last quarter of magazine
- Adjacent to copy-heavy edit
- 50%+ ad (versus edit)
- Adjacent to compatible editorial

Ad Quality

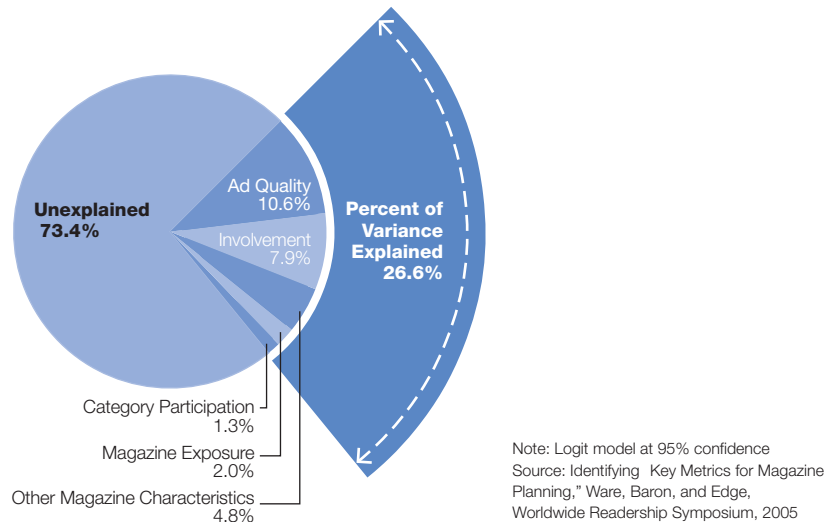
- Attention and appeal
- Communication, believability, persuasion

Source: "Identifying Key Metrics for Magazine Planning," Ware, Baron, and Edge, Worldwide Readership Symposium, 2005

Quality of Media Content and/or the Advertising in It

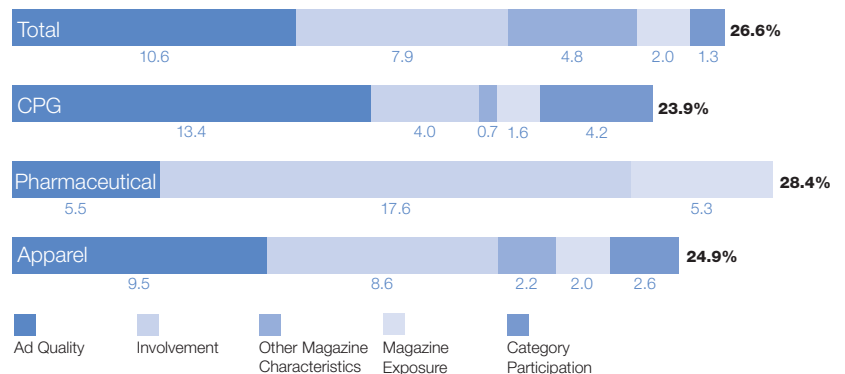
Other research has examined how the relationship between advertising, creative and the media environment affects results. An FCB/Meredith Corporation/Knowledge Networks study set out to identify drivers of magazine advertising effectiveness using advertising recall scores. They found that advertising quality (creative) was the strongest known predictor of advertising effectiveness overall. Involvement was the next strongest predictor.

Percent of Variance in Ad Recall Explained—Total Model



The study also revealed the factors that accounted for advertising effectiveness varied by product category. Quality creative was particularly important for consumer packaged goods (CPG) and apparel. It did not figure as strongly for pharmaceuticals, perhaps due to regulations that affect creative for that category. Instead, involvement accounted for more than half of pharmaceutical's explained advertising recall.

Percent of Variance in Advertising Recall Explained Total vs. Product Category Models



Source: "Identifying Key Metrics for Magazine Planning," Ware, Baron, and Edge, Worldwide Readership Symposium, 2005

“The development of new marketing concepts and better research tools are crucial to increasing understanding of engagement with brand ideas and their interaction with the context that surrounds them. Continuing to just focus on quantifying the opportunity to see, hear or experience is not enough to succeed. Going forward, we need to be able to harness the synergistic power of the many aspects of engagement to improve advertising effectiveness.”

— Dr. Joseph Plummer, Chief Research Officer, Advertising Research Foundation

Engagement going forward

As interest in engagement continues to grow, new research and in-market experience will increase the understanding of engagement's role in improving advertising results. Findings in engagement research can already be used to change the way that advertisers think about the relationship among consumers, the advertising message and the advertising environment. Overarching findings to date include:

- A variety of exposure and relationship factors affect engagement; therefore, simple rankings may be misleading
- Engagement with a medium often differs from engagement with its advertising
- Targeting and relevance are important: the “fit” among the consumer, the advertising message and brand and media equities affect engagement
- Engagement factors vary by demographic and product category segment, by medium and by genres within media
- Higher engagement levels seem to correlate with stronger results

Practices will continue to evolve in the wake of new research that attempts to deal with the complexity of engagement. The focus of further study will likely:

- Look more deeply at how engagement varies by demographic, product category and media vehicle/genre segments
- Investigate ways to use engagement findings to improve consumers' interaction with creative
- Go beyond studying consumer engagement with individual media and examine the synergies among media
- Expand to other marketing vehicles such as event and direct marketing
- Explore how creative placed in various advertising environments differs, perhaps resulting in the development of different creative messages for each medium or genre
- Correlate engagement to actionable results, leading to the development of new tools and systems that will evaluate various media against user-defined objectives
- Study how the synergies among media and brand equities affect advertising results

As advertisers' knowledge about engaging consumers continues to grow, advertisers' ability to reach consumers with targeted, engaging messages will lead to better communication, and ultimately, better advertising results.

“In the '50s and '60s, copy testing was mainly about recall—and then in the '70s and '80s, they were talking about persuasion, and in the '90s it was about liking—getting the consumer to like the advertisement. Now it's got to be about engagement.”

— Mike Hess, Director of Global Research and Communication Insights, OMD

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For more information on the engagement research presented here, please contact Wayne Eadie, Senior Vice President and Director of Research, Magazine Publishers of America. For additional copies of this guide or other MPA resources, please contact MPA at promotion@magazine.org or go to our website: www.magazine.org.

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Engagement: Understanding Consumers'

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