



# How much advertising do we see?

And does clutter really matter? Asks **Andrew Green**

**A**MERICAN CONSUMERS see a lot of advertising. Most TV stations broadcast almost 16 minutes of 'non-programming material' every hour in primetime and over 20 minutes in daytime. On top of this are hundreds of product placements.

This equates to a daily dose of more than an hour. The UK equivalent is about 20 minutes - or 45 messages daily.

Radio stations run just under 10 minutes of commercials every hour in the US; they are restricted to an average of 9 minutes in the UK - although this doesn't stop them running as much as 14 in the peak breakfast-time segment.

In short, viewers and listeners are bombarded with more and more advertising messages from all sides.

## The issue

In markets like the US, with no regulatory ceiling on the volume of advertising, marketers take the view that, although they work in an increasingly cluttered environment, the alternative - paying to be in a less cluttered environment - is not worth the added effectiveness.

Print media, out-of-home and, to a large extent, the internet allow users to exercise a high degree of control over the marketing messages they see. Pages can be turned, eyes averted and mice clicked to avoid seeing advertising in these media.

But, on TV and radio, advertising interrupts programmes and forces viewers and listeners to sit through it. This intrusiveness is cited as a key strength for TV. But it may become a weakness, as choice and technology improve.

Viewers enjoy a greater choice of what to watch than ever. Many households own DVD players, multiple TV sets and remote controls, all of which offer them the ability to control their viewing environment.

The latest gizmo - the personal video recorder (PVR) - allows them to pause, fast-forward and re-schedule programmes at their own convenience, rather than the stations'. At the end of 2006, 15% of US and 7% of UK households owned one.

## Approaches

People's dissatisfaction with advertising has been growing as its volume increases.

In 1959, Gallup reported that US people enjoyed advertising, finding it informative and preferring advertised products. Various studies have shown this attitude to have been replaced by increasingly negative attitudes, as its volume has grown.

By 2004, Knowledge Networks found that half of all viewers of primetime TV switched stations rather than sit through a mass of commercials. Many more doubtless leave the room, talk to other people or simply shift their attention.

A UK survey in 2000 found that most people were neutral about advertising. But 17% actively disliked TV commercials, while 12% felt the same way about print ads.

## Declining ad recall

People are also finding it harder to remember individual ads. Studies by the US Newspaper Advertising Bureau between the 1960s and 1990s traced a decline in people's ability to recall commercials they had only just been exposed to: where 20% could correctly recall a message in 1965, only 6% could do so by 1990.

A 1997 study found that *perceptions of ad clutter* influenced the likelihood that people would actively avoid ads (for example, by switching).

It concluded that it was people's perception of clutter, rather than its absolute level, that was important.

TV is perceived more negatively than other media, because viewers cannot usually control the advertising broadcast to them. Marketers have sought to combat avoidance by pushing advertising even more into viewers' faces - for example (in some countries) by moving breaks from before programmes to just inside them. This may, of course, annoy.

Control is the key issue. Internet users were driven crazy some years ago by an onslaught of pop-ups and other intrusive messages, which clogged up PCs and prevented people getting to the information they were seeking.

But with faster connection speeds,

improved anti-spamming software and a move from banner advertising to search all subsequently improved the internet advertising experience.

The question for TV is whether the new controls offered to viewers via PVRs, broadband internet and massively increased channel choice will be used to actively avoid advertising.

When viewers watch in time-shift mode via PVRs, they are in full control of what is in front of them. US research commissioned by ESPN found that about 40% of viewing on PVR-equipped sets took place in time-shift mode.

Starcom in the UK found that playback represented 38% of all household viewing, although two viewing panels (BARB and Skyview) have reported it as only 13-15%.

Once in playback mode, Lifetime Television in the US reported that 99% of PVR users 'skipped advertising where possible'. Starcom found 77% of commercials were avoided in the UK; Skyview's figure was 61%.

At present, most homes do not have PVRs and even those that do still mostly watch television live. But their future behaviour will surely be influenced by how advertisers act today.

## Summary

The link between growing clutter, consumer attitudes and their inattention to marketers' messages seems clear.

Radio stations like those of Clear Channel in the US and Capital Radio in the UK have chosen to reduce their advertising content in the belief that the advertising that does air will get a better hearing when it is relatively uncluttered.

They are undoubtedly right. But the economics of giving up a significant proportion of advertising time in the hope that marketers will pay a premium for the time that remains have yet to be proven. There is a need for more research on the 'less is more' phenomenon. •

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