

YOUNG CONSUMERS AND MEDIA

by Gale Metzger

Putting today's headlines in perspective is essential to making smart decisions in marketing to any generation

Have young men given up on media as we know it? Will today's teens relate to anything but videogames and Google when they grow up? And can anyone really get a brand message through to these important consumers via conventional means?

If you've been watching the headlines, as I have, you may have doubts about the answers to all three of those questions. Sometimes it seems that the air is full of dire warnings about the effectiveness and long-term viability of today's advertising model. You might think that all the young TV viewers in the U.S. own a TiVo and have pretty much stopped watching ads over the past year or so.

The truth behind this groundswell of concern is that such "sun flares" can happen at any time, with any important media

audience—and that the hubbub is often the result of less-than-rigorous thought as to what's going on with media. Consistent study and attention from marketers is necessary to identify trends as they evolve. Then, advertising plans can be adapted proactively.

"CORRECTIONS" ARE USUALLY OVERSTATED

The media world is in the midst of extraordinary change—but change is the norm for this and all other business models. I would suggest that it is not the *change* that has happened overnight. Rather it is a reckoning with trends that have been taking shape for years, if not decades. And, as with most "corrections," the *perception* of sudden, dramatic transformation is exaggerated. Let us use some exclusive Knowledge



Networks/SRI findings to help us put things in perspective—and arrive at some prescriptions for making sensible messaging plans in this emerging media world.

It turns out that the biggest growth in videogame use—among all homes and those with kids and teens—occurred before 2000, with big increases between 1990 and 2000 (see *Chart 1*); it has actually leveled off a bit in our latest surveys. Internet access in these households had its most dramatic surge between 1995 and 2000, with a decided leveling of growth in the years since.

Second, young, old, and in-between are all voracious consumers of media. *Chart 2* shows, for example, that the Internet has not taken time away from television, even among the controversial 18 to 34s, although the two media were thought to be mutually exclusive in the not-too-distant past. Instead, total time with media has

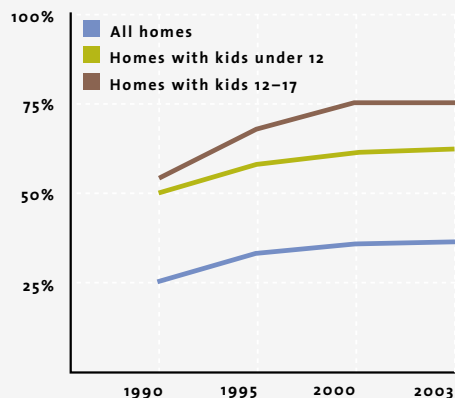
grown over the past three years—including a dramatic increase in TV use among those 35 and older.

The fact is that TV still dominates media use across generations (*Chart 3*). On a total-day basis, more people spend more time with TV than all other media combined.

But experience has taught media planners that relying heavily on television can have downsides. As the price of TV ad time has continued to climb steeply, planners and buyers have tried to find efficiencies by working with a range of media. As it turns out, this approach also pays benefits with consumers, who are more likely to remember a message if they are exposed to it in several media—combinations of radio, TV, Internet, magazine, and newspaper ads that reinforce the same message. The question then becomes, How can I combine media with greatest efficiency to reach my target consumers?

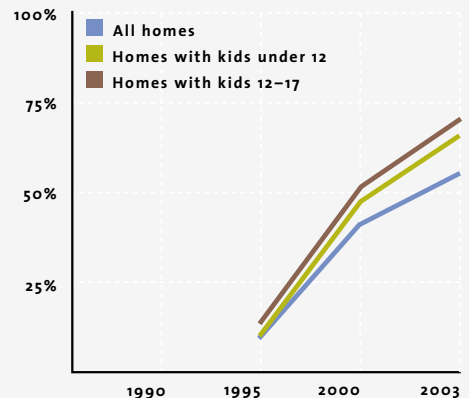
CHART 1: TRENDS IN ACCESS TO NONTRADITIONAL MEDIA

U.S. homes having a videogame console.

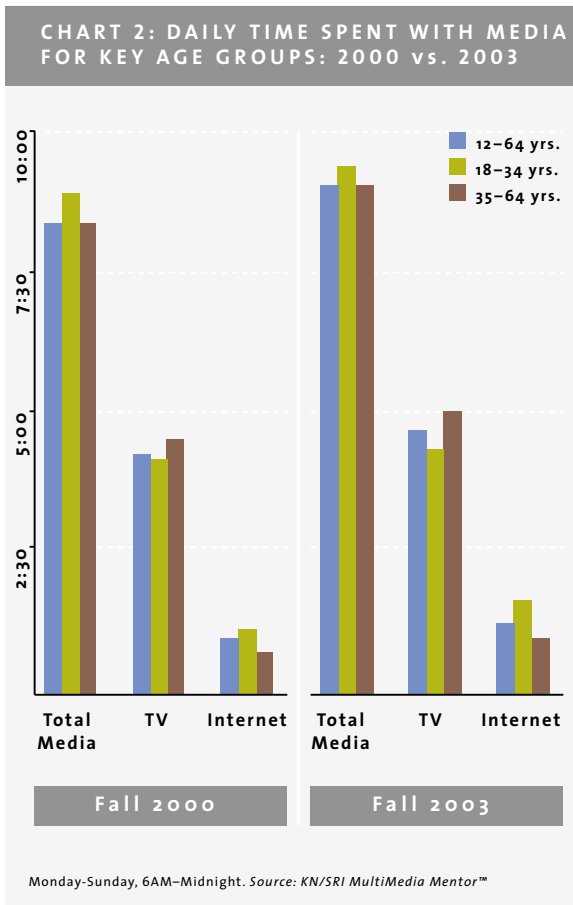


Source: Knowledge Networks/SRI, The Home Technology Monitor™

U.S. homes having online access.



Source: Knowledge Networks/SRI, The Home Technology Monitor™



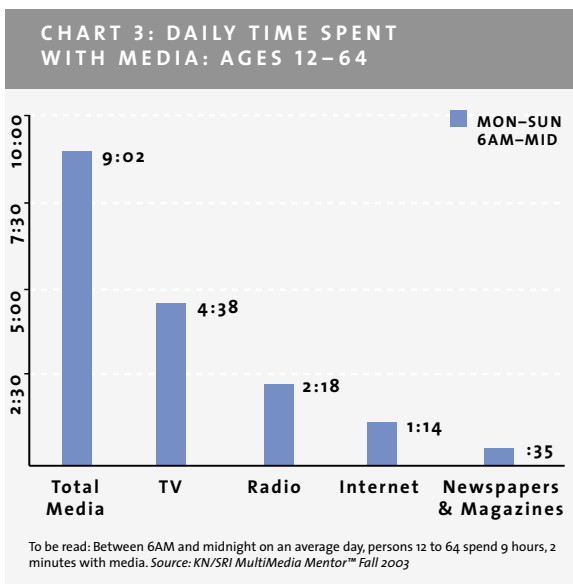
APPLES-TO-APPLES INSIGHTS ESSENTIAL

There is both science and art in the creation of effective media allocations. We know that media use varies consistently by person type: young behave differently and access media differently than old. The presence of a child in a home changes usage patterns. Different people use media in different ways, and that means that a real data-based comparison among media audiences is all the more important. The commonly used approaches for making these all-important allocations are hardly up to the task of subtlety.

Most cross-media allocations are based on single-media measures—TV data from one source, radio from another, and so on. If apples-to-apples is the ideal comparison, then these more often fall into the range of apples-to-pears (if not cantaloupes). A better approach is to ask the same consumers about their recent use of a range of media, creating a “single-source” measurement. This technique is employed by Knowledge Networks/SRI’s *MultiMedia Mentor*™, which covers TV, radio, the Internet, magazines, newspapers, videogames, cinema advertising, and the Yellow Pages.

You saw some *MultiMedia Mentor* data to the left; here are some other insights that may challenge your view of media:

- **Internet:** We recently saw more than 70 percent of both males and females 12–64 report that they have used the Internet in the past month—a first. Women’s time with the Internet is growing faster than men’s; in younger age groups, women already spend more time online.



- **Videogames:** In the 18–34 age group, 25 percent of men report that they play videogames in a typical day, and more than 50 percent own a videogame system.
- **Television:** Sports fandom can be a predictor of media use: men over 21 who are “very interested” in sports spend 12 percent more time with TV than is typical for their sex/age group.
- **Product/service use and media:** We have found that men 25–54 who spend more than \$1,000 a year in home improvement stores are also hyperactive with media, with particular emphasis on radio. There are a host of similar product/service-related scenarios for media use.

In this era of multitasking, the idea of classifying people as binary creatures—either in or out of an audience—defies reality. Think about TV viewing—does anyone ever sit and watch the programming and commercials with essentially undivided attention? Isn't

INVOLVEMENT AS A MEDIA COMMODITY WILL GROW IN IMPORTANCE AS ATTENTION FRAGMENTS THROUGH LIFESTYLE CHANGES AND TECHNOLOGY INNOVATIONS.

it true that—depending on where, when, how—attention to the screen varies widely? For television, we know that a woman viewing a drama alone in her bedroom late at night is more attentive to the program content than the same woman watching a quiz show with kids in the kitchen in the afternoon.

INVOLVEMENT: A KEY ELEMENT OF EFFECTIVENESS

Involvement as a media commodity will grow as attention fragments through lifestyle changes and use of remote controls, TiVos, and the like. The presumption is that consumers who are more involved are more likely to see and be influenced by commercials than those exposed in less-engrossing situations. Persons who are more involved do say that they are more likely to see and respond to commercials.

Here are some thoughts on being a smart user of 21st-century media for messaging:

Take a step back—Don't let the headlines inform planning decisions.

Look at the whole picture—To make best use of cross-media advertising, it must be planned in a coordinated, methodical fashion.

Remember quality—If you are using insights from multiple sources to create a cross-media plan, a bit of healthy skepticism is in order.

TV is not the only answer—Television remains the powerhouse medium for mass audiences, but extraordinary reach can also be achieved with high efficiency through other media.

Involvement counts—Knowing the times when your targets are most likely to be *attentive* to media is a key component of effective messaging.

Media audiences are no mystery—but understanding them is complicated, requiring sophisticated tools and thoughtful



media researchers. Sources are available that document the many faces of media audiences. Measurement has always been a challenge, and today's media fragmentation and resistance to survey cooperation have amplified the difficulties. Any less-than-holistic view of media use and effectiveness—whether based on headlines or ratings systems—is bound to be somewhat skewed.

As in every business situation, making the right moves means seeing the whole picture and working with the right tools. This is

the only sure way to optimize the efficiency of media spending and get the news about products to customers and prospects.

Gale D. Metzger was cofounder and President of Statistical Research—now Knowledge Networks/SRI; he is currently Senior Consultant to Knowledge Networks. He can be reached at gmetzger@knowledgenetworks.com.