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CONSUMER EVALUATIONS OF TV AD CAMPAIGNS: A THIRTY-YEAR HISTORY

For many years, Bruzzone Research Company (BRC) has conducted consumer awareness studies of TV ad campaigns that are quite different from those done by standard copytesters. Instead of recruiting people to screen programs and then questioning them about the commercials contained therein, BRC contacts samples of consumers, shows them a storyboard-like replica of an ad along with a rough script and then asks whether they have seen that particular commercial before. This is followed by questions about the respondent's interest level in the ad and/or product message, their perceptions of the ad, their ability to correctly identify the advertised brand, its likability and related factors. By focusing on the ad rather than on a hyped one-time program screening, BRC believes that it obtains a more realistic picture of an ad campaign's total penetration into the marketplace—a view we happen to share.

And now to the findings. Thirty years ago, when BRC was conducting its surveys by mail ballots, approximately three out of five persons who returned their questionnaires claimed that they had seen the average TV commercial measured. Of these, 45% (or 73% of those who recalled seeing the ad) correctly named the brand and 11% (or 17% of those who recalled exposure) stated that they were very interested in the commercial and/or its message. As shown in the following table, BRC's new online questionnaire norms for 2004-09 reveal a dramatic loss of awareness for the typical commercial tested. Currently, only 29% of BRC's respondents claim to have seen the average commercial—a decline of more than 50% over the norms that applied two decades ago.

It should be noted that while the percentage of people who recall seeing the average TV ad campaign has fallen dramatically, among those who do claim recall, a slightly higher ratio claimed to be "very interested" in what the ads had to say. As a point of comparison, BRC's 1979 norms found 62% of respondents claimed recall of the typical commercial but, of those, only 18% rated themselves as very interested. BRC's 2009 norms show a 29% average recall rate, but 28% of them described themselves as "very interested."

The implications of these findings are fairly obvious. The general loss in ad awareness that has been noted over this 30-year interval is dramatic, and reflects the declining media values attained by the typical advertiser's current TV expenditures. In short, since ad spending has not kept pace with audience attrition, advertisers are generating less reach and frequency per dollar with their TV campaigns than before and commercial zapping has risen by 50%. So quite naturally ad awareness, particularly for specific commercial executions, has declined alarmingly. However, the fact that relatively higher proportions of current recallers claim interest in commercial messages have to say, suggests that, for those viewers who still pay attention to them, TV ads remain effective selling instruments.

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BRC AVERAGE TV COMMERCIAL RECOGNITION, CORRECT ID AND INTEREST LEVEL NORMS

	1979 NORMS[1]	2001 NORMS[1]	2009 NORMS[2]
Recognized Commercial	62%	34%	29%
Correctly Identified Brand	45	22	17
Interest In Commercial			
Very	11	6	8
Somewhat	30	17	15

Note: All data are for a number of years prior to the dates indicated, and are based on surveys from all respondents, whether or not they recognized the average commercial.

[1]*Mail surveys.*
[2]*Online surveys.*

Source: 2001 and 2009 data are from BRC; 1979 norms are from The Case For Testing Commercials By Mail, *Donald E. Bruzzone's presentation to the 25th Annual Conference of the Advertising Research Foundation, 10/23/79.*

How do people rate commercials? Over the years, BRC has developed normative findings using a number of positive and negative attributes. For example, in its current online studies, 43% of those who recall seeing a typical TV ad considered it "amusing" and 34% rated it as "clever." These levels are more than twice those prevailing for the same attributes 30 years earlier. On the other hand, today's commercials rate below their 1970s counterparts as "convincing" or "informative" messages. This suggests that the light, funny and breezy—some might say superficial—stylings of many recent commercials that have been adopted as a means of making them more appealing to a population with reduced attention spans are not necessarily more motivating than the somewhat more doctrinaire treatments of the past. A comparison of BRC's 1979, 2001 and 2009 norms for 11 positive and 6 negative attributes appears in the next table.

One of the most interesting findings in our analysis of BRC's data concerns the distinctions that are drawn between heavy and light viewers. According to the company's 2009 norms, persons who watch 3+ hours of TV daily are more likely to recall seeing an average commercial than those who watch fewer than three hours per day. This is hardly surprising. What is interesting however, is the strong tendency of heavy viewers to rate commercials more favorably than their lighter viewing counterparts. The last table in this report summarizes BRC's profile of commercial attributes raters by sex, age, education and heavy-light TV viewing segments. Taking the positive attributes, heavy viewers (last column) were 10% more likely than all respondents to rate commercials as "convincing," while light viewers were 10% less likely than all respondents to render such an opinion. As one scans down the last two columns in the table, it is evident that heavy viewers are consistently more inclined to rate commercials positively and less inclined to be critical of them (see final table).

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RATINGS OF VARIOUS COMMERCIAL ATTRIBUTES[1]

	1979 NORMS[2]	2001 NORMS[2]	2009 NORMS[2]
Pro			
Amusing	14%	36%	43%
Appealing	12	17	22
Clever	11	24	34
Convincing	14	5	8
Effective	18	17	22
Imaginative	8	21	28
Informative	19	8	13
Lively	7	8	13
Original	8	14	24
Well Done	13	15	24
Worth Remembering	12	10	14
Con			
Dull	10	7	6
Easy To Forget	9	11	9
Irritating	6	4	6
Phony	8	7	5
Pointless	5	9	8
Silly	9	13	17

Note: NA=data not available.

[1]By people who recall seeing an average TV commercial.
[2]All data are for a number of years prior to the dates indicated.

Source: 2001 and 2009 data are from BRC; 1979 norms are from The Case For Testing Commercials By Mail, *Donald E. Bruzzone's presentation to the 25th Annual Conference of the Advertising Research Foundation, 10/23/79.*

While some of BRC's findings may be related to demographics (i.e. heavy viewers tend to be older and less educated than light viewers), we suspect that something else is afoot in the statistical comparisons. As Marshall McLuhan put it in the 1960s, "the medium is the message," and this may be why heavy viewers respond so positively to TV commercials. Putting it in the simplest terms, they prefer this form of communication; accordingly, heavy viewers find commercials more palatable (or less objectionable) than more discriminating light viewers.

Advertisers traditionally make a conscious effort to redirect "redundant" media weight away from the heavy viewer segments to garner more exposure among lighter viewers. Thus far we have seen little evidence that this strategy, even if successful (and cost effective), produces meaningful results. Bruzzone Research Company's data suggest—and that's all we're making of it at this point—that heavy viewers may be more desirable advertising targets for TV ad campaigns than is commonly recognized.

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RELATIVE INDICES OF POSITIVE OR NEGATIVE ATTRIBUTE RATINGS[1,2]

	SEX		AGE		EDUCATION		TV VIEWING FREQUENCY	
	MEN	WOMEN	< 35	35 +	COLL. GRAD.	NOT COLL. GRAD.	<3 HRS. DAILY	3+ HRS. DAILY
Positive Evaluations								
Amusing	101	99	105	97	99	101	99	100
Appealing	98	103	114	92	94	103	96	104
Believable	95	105	98	101	88	107	91	111
Clever	101	99	101	99	103	99	99	101
Convincing	99	103	107	95	85	109	90	110
Effective	102	99	101	99	95	103	97	103
Fast Moving	103	96	101	99	98	100	97	104
Imaginative	100	98	99	101	101	100	98	103
Informative	98	102	95	103	95	104	92	109
Lively	96	104	116	91	98	101	97	103
Original	100	99	104	97	100	100	99	102
True To Life	89	110	102	99	88	109	93	107
Warm	94	108	89	106	100	100	97	103
Well Done	101	98	99	100	94	104	94	107
Worth Remembering	93	105	113	93	86	109	93	108
Negative Evaluations								
Confusing	104	96	90	104	108	94	100	98
Dull	116	81	107	97	97	102	102	98
Easy To Forget	113	84	92	104	101	100	101	99
Irritating	105	95	93	104	116	90	105	97
Phony	116	82	84	110	104	96	104	98
Pointless	114	86	86	108	107	94	105	95
Seen A Lot	97	104	109	96	91	105	94	106
Silly	101	99	111	93	96	103	97	103
Worn Out	119	81	112	95	104	96	102	98

[1]*By adults who recognized an average TV commercial.*
[2]*Norms based on Bruzzone database for 2004-2009.*

Source: Bruzzone Research Company.

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TV COMMERCIAL AWARENESS AND ATTRIBUTE RATINGS VARIATIONS BY PRODUCT CLASS

Most research companies that measure the impact of TV commercials or ad campaigns aggregate their data in various ways to provide clients with normative data. One of the most common of these is product category norms, which are often very revealing. A case in point is the latest norms (2004-09) from Bruzzone Research Company's (BRC) ongoing online studies of TV commercial awareness and the subsequent evaluations provided by each respondent who claims to have seen an ad, describing his reactions to it.

Although many factors are involved in commercial awareness—including the level of media weight behind the campaign, as well as the ad's communicative effectiveness and attention-getting prowess—distinctions by product class are noteworthy. The first table indicates the percent of respondents who recognize (have seen) the average TV commercial when a replica is presented to them online in a storyboard (plus script) form. As indicated in the first column of the top row, on average only 29% of BRC's respondents claimed awareness of the typical commercial studied. The second column indicates the percent of all respondents who both recalled seeing the ad and were able to name the advertised brand (brand names are not revealed on the storyboard or in the script). Finally, the third column shows the percent of respondents who recognized the ad, correctly named the brand and also indicated that they liked the commercial.

The breakdowns reveal that certain classes of advertisers are far more successful in registering their claims than others. For example, food commercials continue to rate at the top of the list in commercial awareness, brand ID and likability. In contrast, the performance of apparel, household durables and automobile commercials fell well below par (see first table).

A warning sign for advertisers concerned with the eroding impact of TV commercials due to heightened ad clutter and increased "avoidance" is revealed by a comparison of BRC's 2009 and 2001 norms in the second table. BRC's 2001 norms—which cover a period extending well back into the 1990s—showed that 46% of those who recalled seeing an average ad also identified the brand name correctly and claimed that they liked the ad. The corresponding ratio for BRC's 2009 norms was only 39%. With the exception of the apparel category, similar declines were also noted for all of the product classes, reflecting an across-the-board erosion of communications effectiveness. In short, not only are fewer people able to recall their exposure to specific commercials, but their ability to correctly link the brand and its message and their affinity towards the commercial are in decline as well.

When respondents who are aware of commercials are asked to rate them on a variety of positive and negative attributes, the BRC results suggest that entertainment values are a key determinant of commercial liking, which, in turn, has been shown to be predictive of ad impact and/or motivating power. But not always. In the third table, we see that beer/wine (we assume mostly beer) commercials rate well above average on the amusing, clever and imaginative scales but, at the same time, they are poor performers in terms of believability or convincing power. On the other hand, household non-durables (soaps, detergents, etc.) that are very big on making solid efficacy or efficiency claims fare well on the "informative" evaluation.

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AVERAGE TV COMMERCIAL RECOGNITION AND BRAND ID AND LIKING SCORES BY PRODUCT CLASS

	RECOGNIZED COMM'L.	RECOGNIZED COMM'L. & ID THE BRAND	RECOGNIZED COMM'L., ID & LIKED COMM'L.
All Commercial Average	**29.2%**	**17.0%**	**11.5%**
Product Category			
Food	34.4	26.5	17.0
Soft Drinks/Beverages	33.5	23.1	15.6
Movies	32.5	25.0	18.0
Beer/Wine	33.4	21.1	16.2
Apparel	22.2	16.2	9.8
Household Durables	30.6	11.7	7.5
Household Non-durables	27.4	16.5	8.9
Autos	27.1	12.1	7.7

Source: Bruzzone Research Company, 2009 norms for the period 2004-2009.

The third table summarizes BRC's huge variations in positive and negative rating indices for the major product classes included in the company's 2009 norms. For example, movie commercials are most likely to earn positive "fast moving" evaluations (280 index) but, at the same time, they nearly top the negative "worn out" evaluation (120 index). Similarly, beer/wine commercials get a high score in the "amusing" category (138 index), but were also strongly rated as "silly" (160 index).

Obviously BRC, like other advertising awareness/impact researchers, provides more specific product class norms within the broader categories shown in our tables. A diet soft drink marketer may compare her commercial's performance with those for other diet colas or soft drinks, while a detergent marketer's results will probably be compared to those for other detergent brands, etc. Regardless of how narrowly these comparisons are focused, most ad campaigns succeed or fail within the context of an overall product class halo effect, governed by prior consumer experiences with the product, exposure to old ad campaigns and the resulting cynicism or receptivity that builds up. Let's face it, some products or services are more interesting and personally relevant than others. Moreover, prior ad campaigns for some products are considered to be notoriously phony or misleading, while those for other categories are seen as helpful or informative by most consumers. Even if a detergent, car or beer commercial garners awareness and registers its claim, this may not result in significant numbers of consumers changing their minds about buying the brand.

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PROPORTION OF THOSE WHO RECALL EXPOSURE, I.D. BRAND CORRECTLY AND LIKE THE COMMERCIAL

	2001 NORMS[1]	2009 NORMS[2]	% CHANGE
All Commercials	**46%**	**39%**	**-15**
Product Category			
Food	65	49	-25
Soft Drinks/Beverages	65	47	-28
Movies	65	55	-15
Beer/Wine	64	49	-23
Apparel	43	44	2
Household Durables	43	25	-42
Automobiles	38	28	-27
Household Non-durables	34	33	-3

[1]*Covers most of the 1990s, as well as 2000-01.*
[2]*2004-2009.*

Source: Bruzzone Research Company.

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RELATIVE INDICES OF TV COMMERCIAL VIEWER EVALUATIONS BY SELECTED PRODUCT CLASSES

2004-2009

	FOOD	SOFT DRINKS/ OTHER BEVS.	MOVIES	BEER/ WINE	APPAREL	H.H. DURABLES	AUTOS	H.H. NON-DURABLES
Positive Evaluations								
Amusing	110	128	77	138	92	101	83	82
Believable	85	44	66	58	68	88	73	98
Clever	92	113	68	124	88	102	95	80
Convincing	89	55	108	61	84	106	94	106
Fast Moving	78	116	280	85	126	115	130	64
Imaginative	92	118	92	124	95	98	101	79
Informative	82	42	77	47	47	104	99	115
True To Life	71	43	60	67	71	71	56	88
Well Done	90	102	106	117	91	94	94	70
Worth Remembering	96	107	138	127	94	94	85	74
Negative Evaluations								
Confusing	82	98	92	72	162	128	136	132
Dull	116	95	73	91	114	116	134	161
Easy To Forget	102	94	92	92	109	116	132	145
Irritating	115	110	83	108	131	105	107	149
Phony	123	108	71	102	137	100	133	119
Pointless	113	124	73	125	161	111	142	134
Silly	131	143	85	160	95	108	92	101
Worn Out	127	89	120	107	102	86	109	118

Source: Bruzzone Research Company, 2009 norms for the period 2004-2009.

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