



SIFO
RESEARCH INTERNATIONAL

ADVERTISING AVOIDANCE

The quiet consumer revolt





SIFO
RESEARCH INTERNATIONAL

We wanted to chart the extent to which individuals actively try to avoid advertising in some media, while they do not mind advertising in others. We quickly found that as many as 22% of Swedes avoid advertising in all traditional media.

But it also quickly became clear that there are many different types of advertising avoiders, and that the strategies for success in reaching them must vary.

Peter Callius, Research International Sweden

ADVERTISING AVOIDANCE

It is easy to remember the past in a rosy afterglow. In parallel, there is a long-lived and romantic idea that the work of marketers was easier in the past. There were fewer and larger media, consumers waited with excitement and looked forward to taking part of the marketers' new offerings, which not seldom brought with them the hope and promise of the future in a fairly grey post-war period.

I myself remember with nostalgia my childhood's tense anticipation before the approaching advertising feast in the cinema darkness, when colour and sound would flare up in the darkened cinema. And if we go back another generation, we find the first light and neon advertising signs, which became literal beams of light (as they lit up the city!) as appreciated meeting places and features of the townscape.

This tense and welcoming anticipation has today in many people been replaced by a tiredness and increasing irritation about advertising, which is becoming ever more intrusive. Advertising that is always seeking us out instead of waiting for us to seek it out; and that some-

times makes us feel mugged and in need of fighting it off.

However, here we must remember that our acceptance levels for what we experience as interference has varied very significantly over time, as have so many others of our values and interpretations.

Already in 1759, Samuel Johnson expressed the following:

“Advertisements are now so numerous that they are very negligently perused, and it is therefore become necessary to gain attention by magnificence of promises and by eloquence sometimes sublime and sometimes pathetic.”

It is easy to imagine how Samuel Johnson would have felt the pressure of advertising in today's society; being constantly bombarded by messages - commercial and others.

From broadcast to narrowcast

But what is it that has really happened; what is it that has changed? Accelerating technical development coupled with increasing individualization, diversification and an ever more heterogeneous and less static and predictable society, has led to ever more personalized products and media.

In other words, for a great number of years, we have been getting more and more, smaller and smaller and more niche and specialist media to choose from. At the same time, we have remained people with the same limited capacity and mental bandwidth for receiving, digesting and making decisions regarding all the new choices that society is providing us with.

The whole country no longer gathers in front of the, before, only talk show available on the TV on Saturday nights in order to have a common subject of conversation during the coffee break on Monday morning. The digital camp fire has been put out, and we have gone from broadcasting to what is now called narrowcasting. The fragmentation and niche development of media has been born of an increasing trend of individualization combined with galloping development of technology. This has produced technical and commercial opportunities for more and more media.

Over a fairly short period of time, we have gone from a society partly characterized by shortages and rationing, where most people followed the path that had already been staked out for them, to a society where the constantly increasing number of choices and alternatives give us a feeling that there is never enough time for all that we want to do - despite living longer and working shorter hours than perhaps ever before.

“... can anything actually be heard if everybody is shouting at the same time?”

Ever easier to reach out and ever more difficult to reach in

We regularly see reports describing how many commercial messages a consumer encounters each day. The number varies from country to country and from survey to survey, but one result appears to be crystal clear and irrefutable – the number just keeps on growing. The most common figure mentioned is that, each day, we are reached by 1,500 commercial messages.

We have moved into a new world, where the opportunities of marketers to reach out to consumers are greater than ever. Hot air balloon advertising, scent-enhanced cinema advertising, advertising on invoices and, unless I remember wrongly, the MD of a media company recently offered his shaven head as an advertising spot (talk of personalized marketing to a specific target group!).

But paradoxically, all these new opportunities to reach out have resulted in a world where it is more difficult than ever to actually force a way through and reach in. For even if the normal methods among advertisers have been to shout louder, consumers have increasingly closed their ears, and the question remains: can anything actually be heard if everybody is shouting at the same time?

A quiet consumer revolt

Even if the reflex reaction of marketers to raise their voices in order to be heard above the others and to force their way through the noise has not always achieved the result hoped for, it has still led to consequences among consumers.

We could call it a kind of advertising revolt, a consumer revolt on the quiet.

The new revolutionaries are, however, not equipped with paving stones or torches; they are not breaking down shop windows or setting fire to advertising hoardings. The barricades and the barriers built are not physical, but mental. They shut off, close down and vote with their feet. They put up “No advertising please” signs on their letterboxes, sign up to the telephone preference service to avoid annoying telephone salesmen, activate spam filters and buy digital hard disk recorders to enable them to choose not to watch advertising.

Different types of media create different types of avoidance behaviour

There are many different approaches to studying advertising avoidance and, irrespective of the approach chosen, it is clear from the start that it is not as simple as determining that advertising in some media or aimed at certain groups in society no longer works. Understanding the different forms of advertising avoidance and the different types of advertising avoiders is much more complex than this, but for that reason a necessary and important issue for all marketers.

As a consequence of the increasing discussions concerning advertising avoidance, we started studying the phenomenon in 2005, using what consumers thought about advertising in various media as the starting point.

We wanted to chart the extent to which individuals actively try to avoid advertising in some media, while they do not mind advertising in others, or even consciously looked for advertising using other channels. On the basis of the research results, we quickly discovered that there were two main types of media, which everybody familiar with the terms “lean forward media” and “lean backward media” will immediately recognize.

The **lean forward media** – characterized by us consuming them actively and mentally leaning forward, of us ourselves reaching out for them and searching out the information we are looking for – exhibit considerably lower levels of advertising avoidance. This leads us to the conclusion that consumers, when consuming these media, not just have control over the advertising, but also over the time and circumstances in which it is present, which is why the advertising is reasonably felt to be more well-aimed and less intrusive – in short, more relevant.

We can choose ourselves to put the non-relevant DM mailings straight in the recycling box and save the relevant ones to read when we ourselves choose to, and feel we have time – this scarce modern commodity. The same applies to a newspaper or magazine: if an advertisement does not interest us, we just turn the page, or, conversely, if we are interested in advertisements for something in particular, we choose ourselves to turn to that page or section.

When we consume these media, we are also helped by

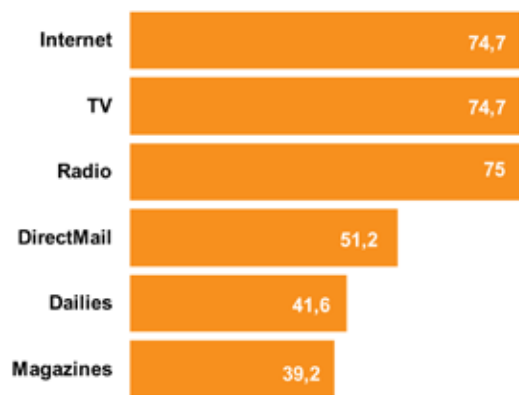
our mental firewall, in the form of “selective perception”, which helps us to filter off, unconsciously, all that we do not find relevant or interesting, that does not speak to us, or appeal to us and that which perhaps is relevant, but which reaches us at the wrong time.

If we look at the classic **lean backward media**, here represented by radio and television, we see a clear tendency where active advertising avoidance is reaching ever higher levels. Here, too, the explanation is logical and conspicuously obvious. These media are characterized by consumers mentally leaning backward and allow the media experience to wash over them, by letting themselves be searched out instead of actively searching out, and being selected as a group of listeners, a target group, instead of searching out what we want to take part in. In total, this gives us considerably less control over the advertising experience, over the messages that reach us, as well as the circumstances and point in time.

As far as the Internet is concerned, this medium holds a bi-polar position. On the one hand, it is by definition a “lean forward” medium, at the same time as large parts of the advertising is of a “lean backward” character. We are searching for the thing to read or do, while the advertising is searching us out. Reports from the USA show that a positive side effect of the current recession is that advertising noise has reduced on the Internet, with positive consequences for the effect of Internet advertising. It is worth pointing out that it is in all probability not search marketing, but display advertising that consumers are referring to in the survey.



Advertising avoidance in different media



The importance of relevance

When we most recently asked 15,500 Swedes about the media in which they avoid advertising, we found the disheartening result above.

It must be pointed out that this does not mean that three quarters of all television or Internet advertising is a waste of time or meaningless, but rather that we as marketers must accept that consumers have activated their mental firewalls and thus become more difficult – yet not impossible – to reach. They have not made themselves unaddressable, but sensitivity and a more well-adapted form of address is needed to make them listen.

“... marketers must accept that consumers have activated their mental firewalls and thus become more difficult – yet not impossible – to reach.”

I therefore think it is reasonable to say that the increasing number of choices in society, coupled with the consumers' experienced lack of time and the ever more deafening media noise means that greater demands than ever are placed on advertising and media agencies.

The advertising must have both “stopping power”, the ability, like Dirty Harry's gun, to halt consumers in their tracks, and also considerable “staying power”, the ability to glue themselves on and, like a sticky chewing gum under the shoe, remain put sufficiently long to make people remember and whistle in happy recognition of a suitable jingle.

But this must be coupled with relevance and timing, must be a message that supports and diverts, rather

than interrupts and destroys. Advertising that is relevant and well-timed is for me, by definition, always welcome. The ability to communicate can, of course, always be destroyed through poor creative design or unsuitable media selection. In the same way, poor timing, an unsuitable time chosen, can make me turn a deaf ear, despite being more than receptive if a better time had been selected.

“In other words, relevance, relevance, relevance are more important than ever.”

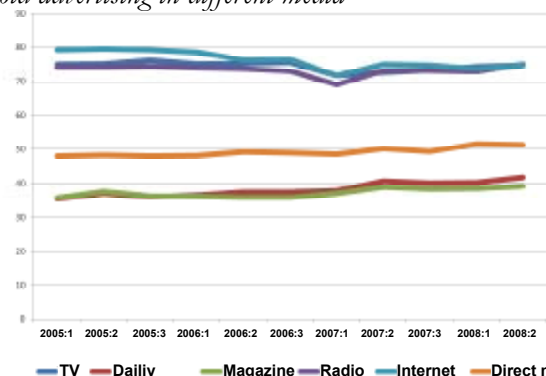
In other words, relevance, relevance, relevance are more important than ever. Target group relevance - the right message to the right target group; content relevance – the right message to the right target group via the right channel; and time relevance – the right message to the right target group in the right medium and at the right time.

Rise and fall of advertising avoidance

When we scrutinize the different media categories and study how advertising avoidance in these has developed over a number of years, we see an interesting development. This is because it soon becomes apparent that advertising avoidance in the lean backward media is falling somewhat over time, while avoidance is increasing in the lean forward media.

Normally, a related conclusion would be that the relationship should be the opposite; that with growing advertising noise, we are increasingly distancing ourselves from advertising we cannot control. Yet this relatively short time series shows the opposite movement, which brings forth the thought that what is happening is that we are developing as media consumers and are learning to handle and navigate through the stream of advertising.

Avoid advertising in different media



Perhaps the apparent contradiction is actually two sides of the same coin? With increased habit and knowledge of control, we are moving more securely also through

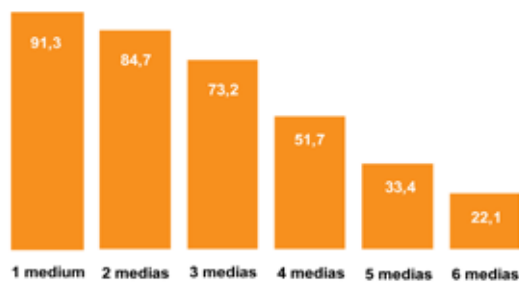
the streaming media and learn more or less automatically how to dodge or filter out that which does not interest us, at the same time as we get more time to stop and listen when we are reached by something that actually hits the target. Once again, it is all about relevance and timing.

However, in total this shows how difficult it is to find simple explanation models, and we must therefore analyze advertising avoidance much more thoroughly in order to understand what is happening.

“Everyone” avoids something and 22% avoid everything

When we study the distribution of avoiders within the various media categories, we can see that as many as 22% state that they actively avoid advertising in all six media channels.

Avoid advertising in number of media



This means that every individual has his/her own set of channels that he/she prefers or does not prefer, that he/she listens carefully to or that he/she fends off directly. Most people can be reached, but not via all channels. This is, of course, a weighty argument for making strong brands visible in more media channels, which must therefore be planned in parallel by the media agency.

Three degrees of advertising avoidance

To clarify further whether there are any underlying patterns in advertising avoidance, a statistical analysis was carried out. This analysis found that there are three main types of consumers.

Typologies



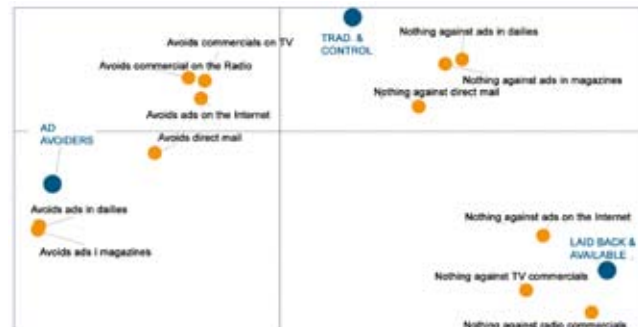
1. 38.6% of Swedes were found to be genuine Ad Avoiders. They avoid advertising in most media.
2. 40.6% of Sweden could be found in a group we cho-

se to name Tradition & Control. Tradition because they are partial to advertising in traditional “lean forward” media (print, DM), and control because the reason for this is that it appears to be important to them to have control over the medium.

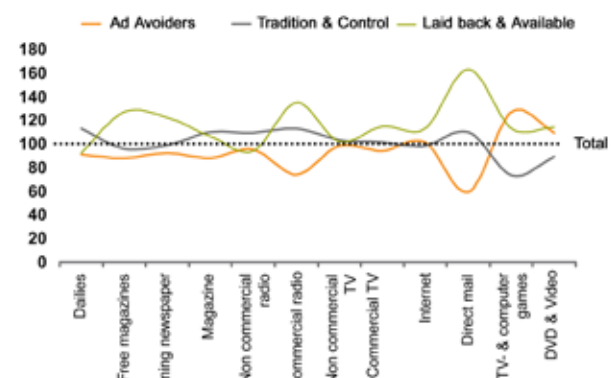
3. 17.8% of Swedes show a completely different behaviour – they are on the whole very positive to advertising in all media, but are most positive to advertising in “lean backward” media - Laid back & Available.

In order to further study the relationships of the three groups to advertising in different media, we created a correspondence analysis chart, in which we show what the attitudes of the different groups to different media are and how they differ. The closer a group and a statement are to each other, the stronger the link between them.

Correspondence analysis



In order to study how the different groups consume media in general, in this image we have indexed the main media consumption. Levels above 100 mean that the group consumes the medium to a greater extent than the average Swede.



We found that the Ad Avoiders in general consume media to a lesser extent. It may thus be the case that one consequence of wishing to avoid advertising is that they choose not to consume the medium at all. We might also consider that the avoidance of both advertising and the medium is a manifestation of a general tired

ness of messages; that the number of incoming messages is reduced by sifting the senders, in order to get more time left over for and enabling concentration on the messages that are actually received. Tradition & Control consume more print (except free papers and evening papers, which are as for Swedes in general) and radio. It is interesting that this group actually appears to listen relatively much to the radio, at the same

time as they actively seek to avoid the advertising in the same.

The Laid back & Available are generally big media consumers and it is only the government owned TV and radio and the paid daily papers that doesn't come to their liking. Maybe it's just because these are the ones that demand that they leave their laid back position, lean forward and actively seek these medias. Maybe this

also says something about how they want to be spoken to? That they are not attracted to the daily press and the non commercial radios relatively academic way of speaking.

To summer this up, we can see that it doesn't exist a clear connection between the liking of advertising and the media that are being consumed in a higher extent - in some cases this relation can even be the oposite.

Three types of ad avoiders

We have studied the different typologies of ad avoiders to understand how they act generally:

1. Ad Avoiders are very traditional and little inclined to change.

They do not distinguish themselves in any respect in terms of socio-demographic differences. The fact is that one could have suspected that this is an ageing group, while in actual fact it includes as large a proportion of young people as the population average.

This is an image as good as any of an ever more diversified and heterogeneous society, where several different "age behaviours" can be found within the same generation and vice versa.

Apart from avoiding advertising, they do have one other characteristic in common: it is obvious that they are low spenders within practically all measured categories. This poses an interesting question:

Do they avoid advertising as they are not interested in spending, or are they not interested in spending, as they do not find any advertising that speaks to them (sufficiently for them not to avoid it)?

2. Tradition & Control on the other hand often try things early, despite the name. They are active news seekers, are at the cutting edge and think that design, shopping and brands are important and urgent issues. In general, they appear to be well read, up-to-date and have a forward leaning perspective on life. They are more highly educated in general terms and live in big cities to a slightly greater extent.

They are, in principle, high or medium spenders within all traditional areas of purchasing. The exception is computer games, DVD films and computer equipment, where they are often medium to low spenders. If one scrutinizes what they use Internet for, the emphasis is on functional use. They book, check up, search and compare – in other words, keep tabs on things and exercise control. As mentioned, they prefer to be searching out, rather than being searched out, finding the information they want, when they want it, rather than having it served up without asking.

Quite logically too, Tradition & Control are also over-represented when it comes to signing up to the telephone preference register so as not to be disturbed by telephone salesmen, once again entirely in line with their emphasis on control ("I choose when I want to be contacted") and tradition ("one should not disturb people at home").

3. Laid back & Available

The individuals in this group are also active and try innovations early. They appear to have a slightly more shallow and materialistic view, where fashion, beauty and shopping are coupled with a relatively traditional view of the world. It is obvious that culture, art and spirituality are not among the interests of this group, a hands-on perspective that is also reflected in the group's demographic composition. This is because it is the least educated segment linked with slightly smaller cities.

From a spending perspective, this is the absolutely least predictable group. They mix and match all the way; in some areas they are high spenders, and in some others no or low spenders.

When it comes to Internet use, the focus is on a more social attitude to the net. People chat, socialize, download and share, participating on the terms of the net instead of trying to direct it and use it to control something else.

The power of words and the might of consumers

Word of mouth – virally extending and deepening the communication of the brand using word of mouth ambassadors – is becoming increasingly important when advertising avoidance is as noticeable as is now the case, and is also a way of getting under the radar and passing through the filter aimed at stopping massive campaigns, not confidential words said in passing.

Another reason why it is becoming increasingly important is what we usually call the consumer's freedom of choice paradox, which arises in today's society where we have the theoretical opportunity of almost unlimited consumer power by always being able to get a superior information advantage.

In this way, we are getting more and more choices, at the same time as it is also increasingly easy for us to be well-informed and accomplished purchasers. However, the dilemma is that with the increased number of choices to consider and the growing amount of information to digest, we are getting ever less time to make these enlightened choices.

This dilemma is underlined by current research, which shows that the more opportunities we have to exercise our information advantage and make enlightened or informed choices, the less propensity we have to spend the time required to really make a rational choice. We are, so to speak, so overwhelmed by the opportunities to choose we are faced with that we choose to refrain from choosing. And it is perhaps no coincidence that rating and comparison sites are popping up all over the place; the most recent one being about food prices in different shops.

For this reason, we as consumers need something we can trust, someone who can hold our hand, guide us through the ever widening landscape and help us to choose.

Within the brand world, we call such a brand a “trusted brand”. But a trusted brand does not really have to be a traditional brand – it can be a medium, a blog or a friend we trust and have confidence in.

Instead of making a rational and time-consuming choice, we instead make the rational but time-saving choice of turning to someone around us, who has already chosen (for us) and in whom we trust.

Olika grupper olika användbara som ”word of mouth”-apostlar

When we study the different advertising avoiding groups from this perspective, we do so using three different parameters.

We study the individuals' **felt knowledge** within a product category. We also study the individuals' felt **“contact network”** – that is the number of individuals they talk with about the product category. Finally, we study the individuals' **felt ability to affect other people** on issues that relate to the product category in question.

A rough analysis indicates that it appears very difficult to get the Ad Avoiders to act as “word of mouth” ambassadors - they have very little interest in most product categories, at the same time as they feel their contact network and ability to influence others to be extremely limited.

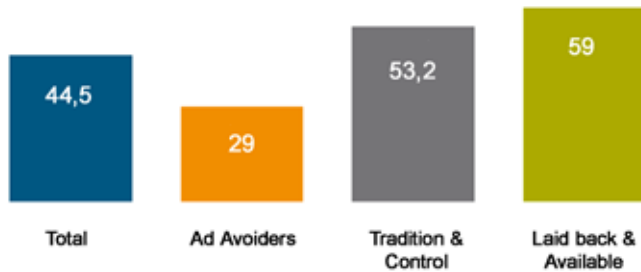
If we study the other groups instead, we find that there are great opportunities to convert their considerable commitment into viral marketing.

This applies in general, across lots of product categories. Of course we recommend everybody to study this in more detail themselves in their unique target groups. An obvious insight is, of course, that it should be possible to use Tradition & Control and Laid back & Available as viral carriers of the commercial messages in order to reach and get through to the Ad Avoiders, who in this way may get both the information they need to be able to consume, and are spared the advertising they avoid as they feel it to be too intrusive. Furthermore, the latter group should not be underestimated, even if it is small, as their social acting on the Internet reasonably gives them contact channels also into the other groups (one person in this group reaching several in the other groups).

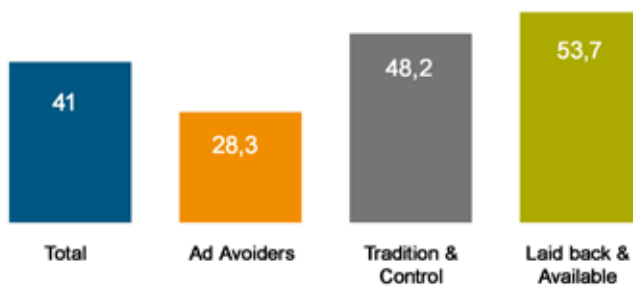
Advertising avoidance can, of course, be studied in lots of different ways, and it is never as easy as individuals liking or not liking advertising, but as we have seen it also has to do with their attitude to advertising in the different media.

When we study a number of advertising statements, we clearly see that these correlate clearly with advertising avoidance in the different media. Of course, it may also be the case that an individual who is basically positive towards advertising can be negative to advertising in particular environments or at particular times.

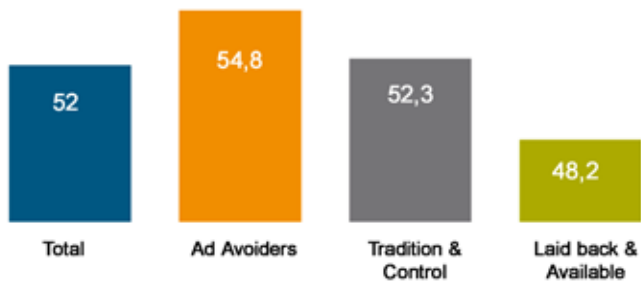
Commercials comfortably gives me information about products



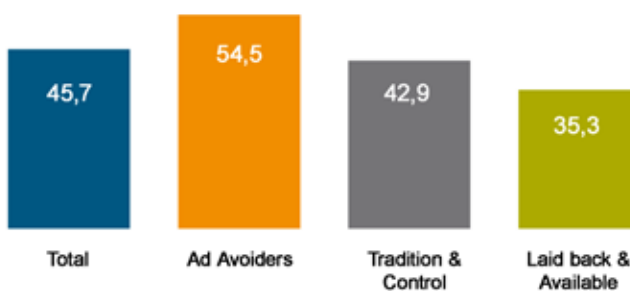
Commercials helps me to choose products



Buy unnecessary things because of commercials



Commercials misleads the public



Positive and negative Ad Avoiders

In order to further understand the complex advertising avoidance, a further statistical model was created. In this, we use statistical analysis to create two groups based on their basic views on advertising, and get an interesting matrix when the analysis is cross-referenced against advertising avoidance in the different media.

	Ad positive	Ad negative
Ad Avoiders	21,8	16,8
Tradition & Control	30,8	9,8
Laid back & Available	15,1	2,6

The different positions can be described in many ways and this might be a reasonable starting point for further discussion about the issue. The yellow segments are “available” via traditional channels, but then vary in openness towards advertising, depending on their basic attitude.

The blue segments try to keep away from advertising in traditional media, but do not necessarily have to be negative to advertising in itself.

If we were to try to describe each segment using only one sentence, the sentences would sound something like this:

■ Ad Avoiders/Positive to advertising

“I actually quite like advertising, but it feels as though there is a bit too much now.”

■ Tradition & Control/Positive to advertising

“I like the fact that advertising can help me, but I would like to have control over when, where and how I am exposed to it.”

■ Laid back & Available/Positive to advertising

“Just pile it on, the more the better – advertising is useful and fun and there is no reason not to enjoy and partake of it.”

■ Ad Avoiders/Negative to advertising

“Don’t want to see – don’t want to be influenced – keep the nuisance away from me.”

■ Tradition & Control/Negative to advertising

“It’s not the case that I like most things, but as long as I’m directing the experience myself it might be OK.”

■ Laid back & Available/Negative to advertising

“Well, it’s not that I like it, but I don’t mind partaking of the advertising.”

Once again, this indicates the complexity and need for a more in-depth analysis of each target group. In order to understand the preconditions we have of succeeding and creating communication that can reach out and reach in, we must understand and behave better in relation to the complex reality in which consumers live.

Summary:

- Advertising avoidance is a fact, which naturally complicates the work of marketers.
- Advertising avoidance is complex and must be analyzed on the basis of the interplay between media-specific avoidance and general attitude towards advertising. In order to reach out and reach in, we must increase our understanding of people and their behaviour and get better and deeper insight into our target group and its motives.
- Advertising avoidance does not mean that advertising does not work, but it places greater demands on the marketer and the marketing. Those who have much to choose from, and always someone talking to them, will also become more selective in terms of who and what they will listen to and trust.
- Message strategy – Relevance and timing are the key words – The right message to the right target group places demands on consumer insight and deeper understanding of the target group. We simply cannot afford not to keep tabs on these any more.
- Communication strategy – Advertising must have stopping and staying power, be adapted to the target group and the unique medium. It is really quite astonishing that there are not more often several unique versions of each campaign, adapted to the target group and the medium.
- Media strategy – Multi-media adapted campaigns is one way of creating the pre-conditions for reaching in. In this way, there are also good pre-conditions for a large proportion of the advertising we send out ending up in more relevant environments (time or content relevance). Today, only a tiny proportion of all advertising is placed in relevant environments, which is waste on a large scale - both of marketing resources and the patience of consumers: the more mis-aimed or irrelevant the advertising, the greater the scepticism against advertising.
- Ad Avoiders can be reached, for example via viral marketing, which is based on advertising aimed at other segments, and which then seeps along to the avoiders via word-of-mouth ambassadors.
- Marketers have a joint responsibility not to contribute to advertising fatigue simply by shouting louder. Sometimes a whisper is enough: if you whisper the right thing at the right time, this is often even the most effective way of reaching in if everybody else is shouting. But in order to do this, we must re-learn to understand people better. By understanding people, we will also understand when, how and where we can and shall communicate.
- Each media plan should include an analysis of advertising avoidance and thoughts about how to solve the issue in the unique case.

For more information please contact:

Peter Callius, Senior Associate Director , p.callius@research-int.com
p.callius@research-int.com

©Research International Sweden AB
December 2008

SIFO RESEARCH INTERNATIONAL
114 78 STOCKHOLM, VISITORS: VASAGATAN 11
TEL: 08 - 507 420 00 FAX: 08 - 507 420 01

ORVESTO® KONSUMENT

The information about advertising avoidance is gathered from and analyzed by ORVESTO® Konsument, SIFO Research International's big media and target group survey. This measures the reach of a large number of media, including newspapers and magazines, ether media, cinema, outdoor advertising, etc. In addition to media information, the databases include thousands of variables of target group character. There is both general information about individuals, such as demography, interests and habits, and "commercially" interesting parameters, such as spending, as well as matters relating to bank and insurance, Internet use and visits to shops.



SIFO
RESEARCH INTERNATIONAL
INSIGHT. INSPIRATION. INNOVATION.

SIFO RESEARCH INTERNATIONAL
114 78 STOCKHOLM, VISITORS: VASAGATAN 11
TEL: +46 (0)8 507 420 00 FAX: +46 (0)8 507 420 01