



How Should You Take TV Advertising Clutter Into Account?

The level of TV advertising clutter varies greatly by country, and the amount of clutter affects the ability of ads to cut through. The natural response to clutter is to increase the spend behind your ad, but that money might be wasted if thought is not given to how the spend is phased.

Despite the explosion in multimedia activity, TV is still the main brand-building medium for big advertisers in most markets. But the amount of TV advertising in different markets varies dramatically. Ad clutter is twice as high in the Philippines as it is in Hong Kong, and twice as high in Hong Kong as in Ireland.

Reduced ad impact

Advertising clutter – the sheer volume of advertising that consumers encounter every day – makes it hard for any individual ad to achieve its most fundamental goal, which is to be noticed.

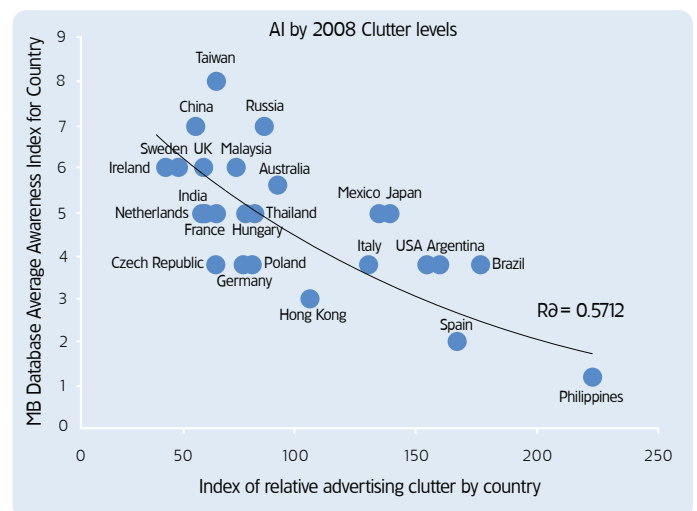
Research by Millward Brown and others has highlighted the importance of achieving and maintaining a share of voice within your category that is at least equal to your market share. But the total amount of advertising within a country – the overall level of clutter – must also be considered.

The more ads there are vying for a viewer's attention, the harder it is for each advertisement to get its message across. This is apparent from the relationship we've observed between ad clutter and the Awareness Index (AI). The AI is our measure of "ad impact," and it describes the increase in advertising awareness per hundred GRPs, after accounting for effects due to media weight, diminishing returns, and advertising history. For each of the markets where we had

both ad clutter information (from Eurodata, Zenith Market and Media Facts) and reliable audience measurement data, we conducted an analysis of the average response per Gross Rating Point (GRP) in terms of advertising impact. Based on the scores across a range of different advertisers, an average for each country was calculated. To aid comparison, the level of clutter was then indexed back to the average of all these countries.

The finding is clear; more ads on air means reduced ad impact. This is probably due to a combination of factors. For example, consumers may leave the room during long ad breaks, or engage in other activity that makes them less likely to see or remember the ads.

The more TV Clutter, the harder it is to cut through

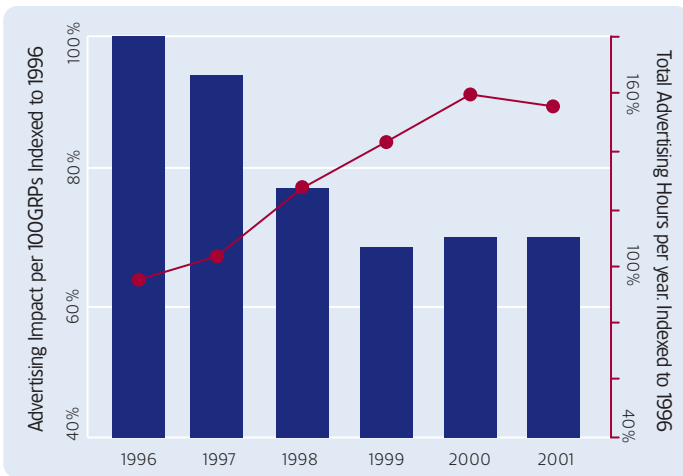


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Spain – an example

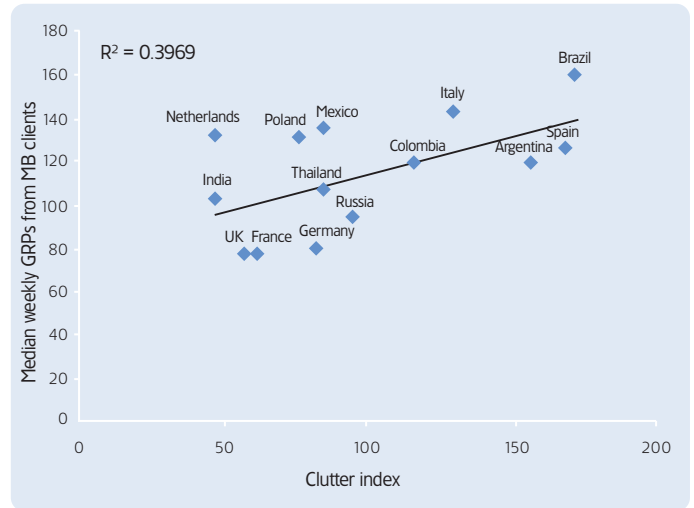
Spain provides a compelling illustration of this finding. In that country, the TV environment changed dramatically between 1996 and 2001; there was a massive growth in the number of new channels, and the volume of advertising shown per year increased tenfold. Over that period, the rise in volume of ad clutter was mirrored by a 30 percent decline in the average level of advertising impact.



How to respond to clutter?

On top of existing considerations about the size of the market and relative costs per thousand, advertisers should think about the effect of clutter when it comes to planning international campaigns. Rules of thumb about media exposure levels or GRP levels do not work across borders. The optimal level of media exposure in a cluttered market will not be the same as that in a low clutter environment. Clearly this is an important factor to consider when deciding how to divide up the media budget across both markets, and across channels within those markets. Increasingly international advertisers often set weights based on clutter guidelines, and we typically see our clients spending more per week in countries with the heaviest clutter.

Brands respond to clutter with heavier weight



What are the implications of increased weight?

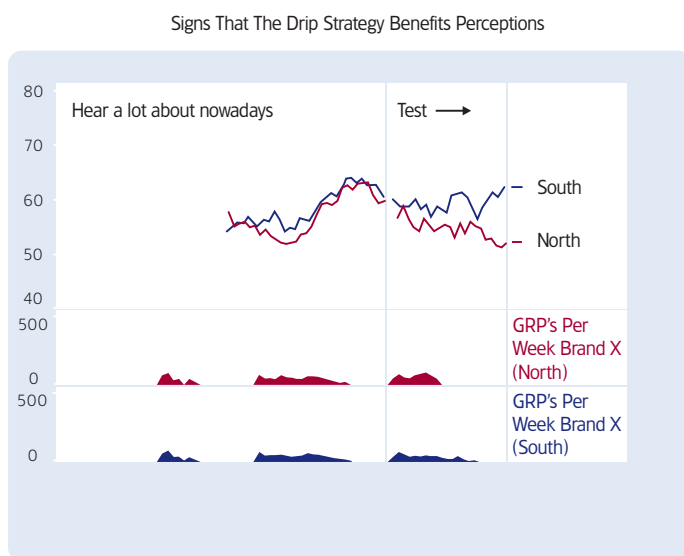
When faced with markets with heavy clutter, advertisers can choose from a number of strategies. The first is to recognize that it is crucial that your creative cuts through, engages viewers, and is memorably branded.

You should also try to maximize media multiplier effects. (See our Knowledge Point “How to make the most of multimedia advertising.”)

While increasing the weight of advertising is a natural reaction to clutter (particularly in a category context), there is the potential for the extra spend to be wasted. For example, we often see that TV is over-invested in the short term. Generally we find ads work from the first exposure; the second and subsequent exposures contribute less, in a diminishing returns pattern. The saturation point varies from campaign to campaign, but, for short term goals, saturation does occur. Nonetheless, continued spending generally contributes to longer-term brand building.



There is, then, a conflict, that becomes most apparent in the countries with heaviest clutter. To overcome the clutter, the tendency is to increase spend. But there is a danger that the increased spend may be wasted. Fortunately, there is evidence that spreading the spend out gives better returns. In one experiment, a brand moved to a drip strategy in the south of the country, while maintaining its burst strategy in the north. The drip strategy was more effective.



Recency planning – the spreading of GRPs to cover as many purchase cycles as possible – has been pursued globally for many years. Examples such as this support such planning. So our recommendation in regard to clutter is often not so much about reduction in spend, as extension over time. This helps Share of Voice in the longer term and helps other media work better for longer.

Nonetheless, there are several arguments in favor of a heavier spend at the start of a campaign. There will be times, such as a launch, when you need to spend heavily to make a big noise. A lot of other activity can be clustered around this “big bang”, including a campaign to increase shelf space.

Even outside of launches, it is important not to lose sight of the value of absolute reach, especially in multimedia campaigns where TV plays an important “pre-cooking” role. So a new TV campaign may benefit from a big “kick off” in the first two weeks. Subsequent weeks can then focus on cost-efficient repetition at lower GRP weights until returns are exhausted.

However, there are two important caveats.

The first is that a low level of weekly GRPs should not all be clustered into cheap, low-reach day parts. While buying cheap GRPs looks cost effective and can, (according to models), generate cost-effective sales, to blindly pursue such a strategy puts a brand’s long-term health at risk. You cannot influence people you don’t reach, so if you are only talking to the proportion of your audience watching daytime TV, you will slowly diminish the brand.

The other important point to note is that it is much harder to demonstrate the value of advertising when a continuous drip strategy is used, since sales and tracking metrics are more likely to show smooth rather than marked changes. This may make it harder for the marketing team to justify their budget down the line.

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