



Relevance and Resonance

Achieving it in the Emerging Media
Ecosystem

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Chaos Theory Meets the Media

Compounded By...



The Curse of the Silos

- It's how we do research and it's how we do communications (planning and ROI)
 - It does not reflect consumers' lives or their relationships with media or brands
- Organizational structures, legacy systems and skill-sets mitigate against addressing new challenges
 - Represents opportunity for new players and threat to incumbents
 - We need to change work and business practices, not just research practices
- Media owners probably moving fastest to meet the challenge
 - But still questions about how to value / sell cross-platform inventory



Addressing the Challenges

- There will be no one solution
 - Challenges are too many, too multi-faceted and too costly
- Digital technology provides many measurement solutions, but also leads to accelerated fragmentation and proliferation of audience and media
 - Interactivity and on-demand
 - No measurement = no sustained activity



Addressing the Challenges, continued...

- It won't be cheap or easy
 - Quick, cheap and high quality don't go together in any kind of sustainable way in any other industry and its no different for research and communications planning
 - Those that subscribe to bargain basement prices will get bargain basement solutions – and erode their market position
- Skill-sets and familiarity with the emerging platforms?
 - Are we training people correctly? Do we understand the emerging media well enough?
 - We will need hybrid marketers to design methods and programs that reflect what we are researching



Teenagers = Screenagers

“A Day in the Media Life”

Timelines for 15 subjects - all screen-based media during a school day



7:00pm-
midnight

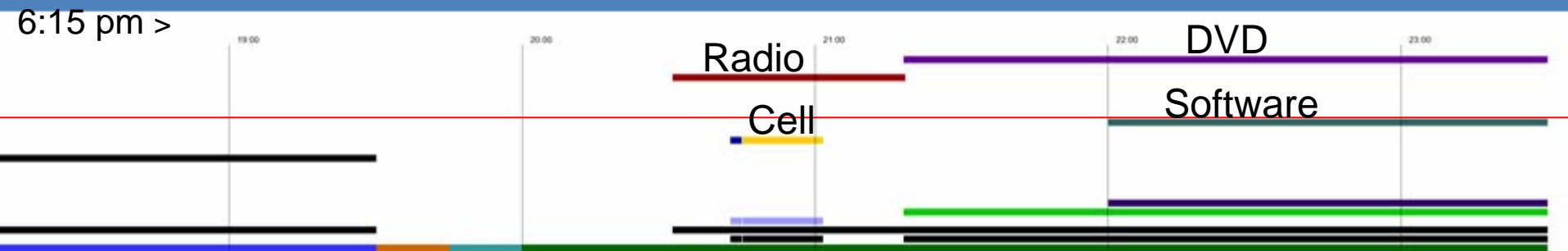
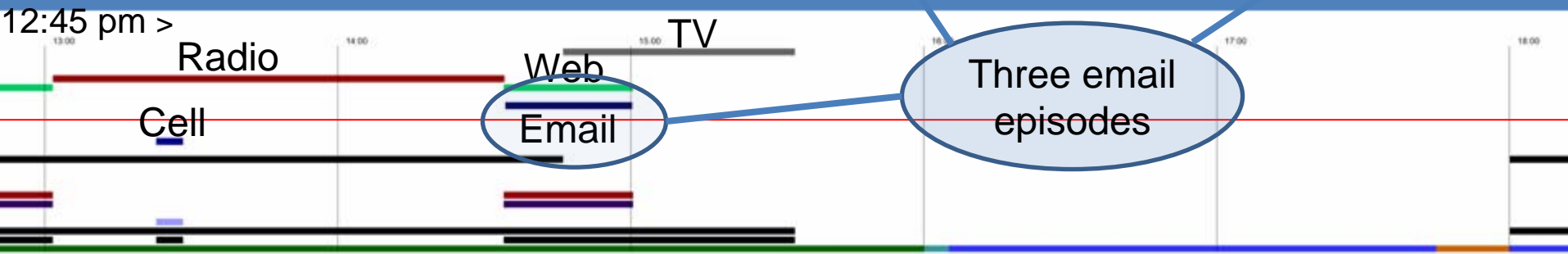
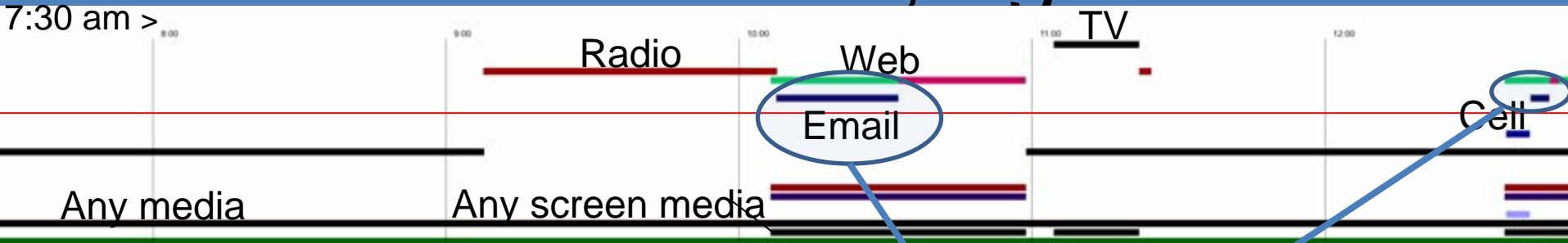
6:30-
11:00am

11:00am-
3:00pm

3:00-
7:00pm

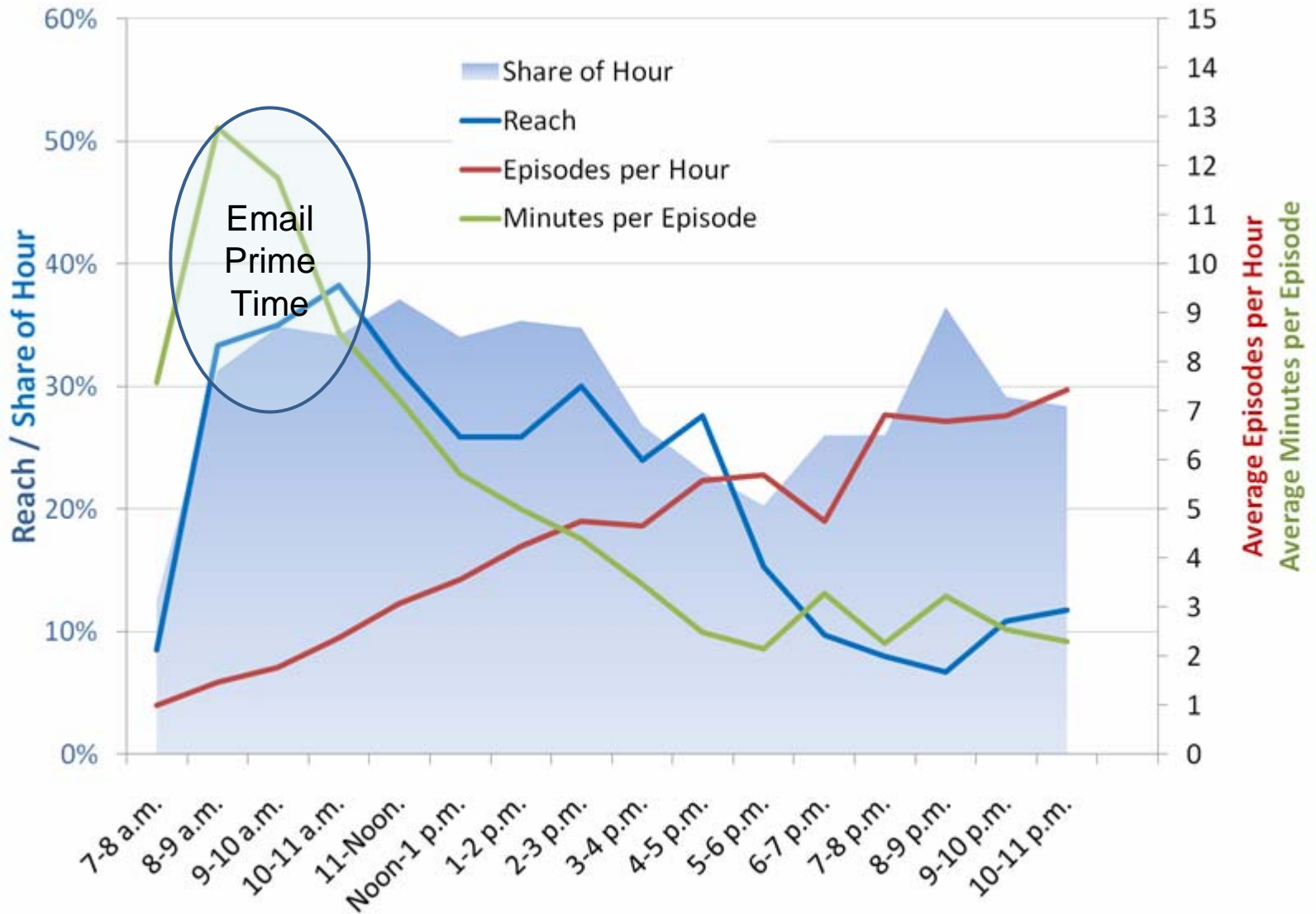


Male, age 32



11:30 p.m.

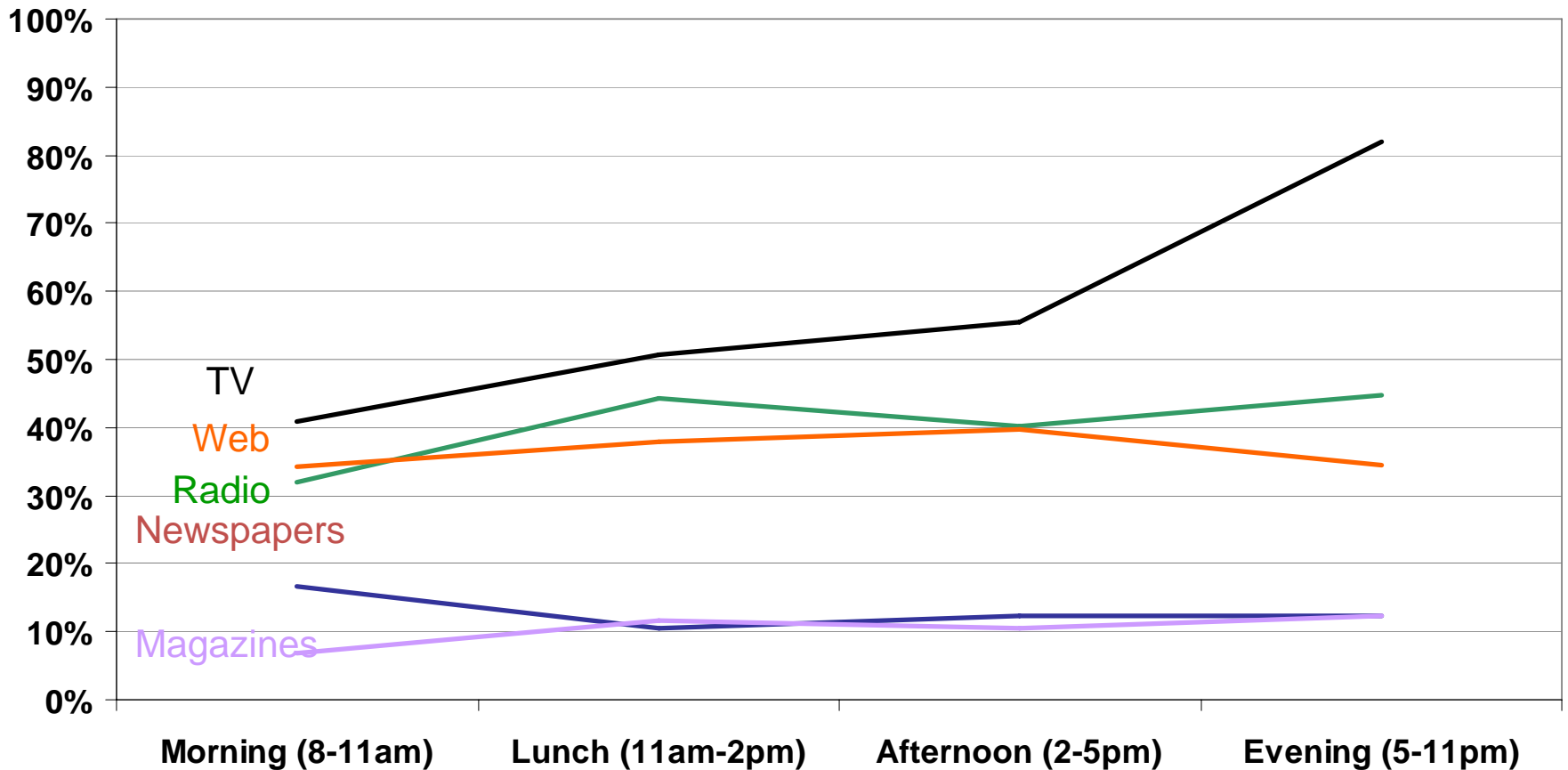
Email Reach and Episode Structure Vary Over the Day



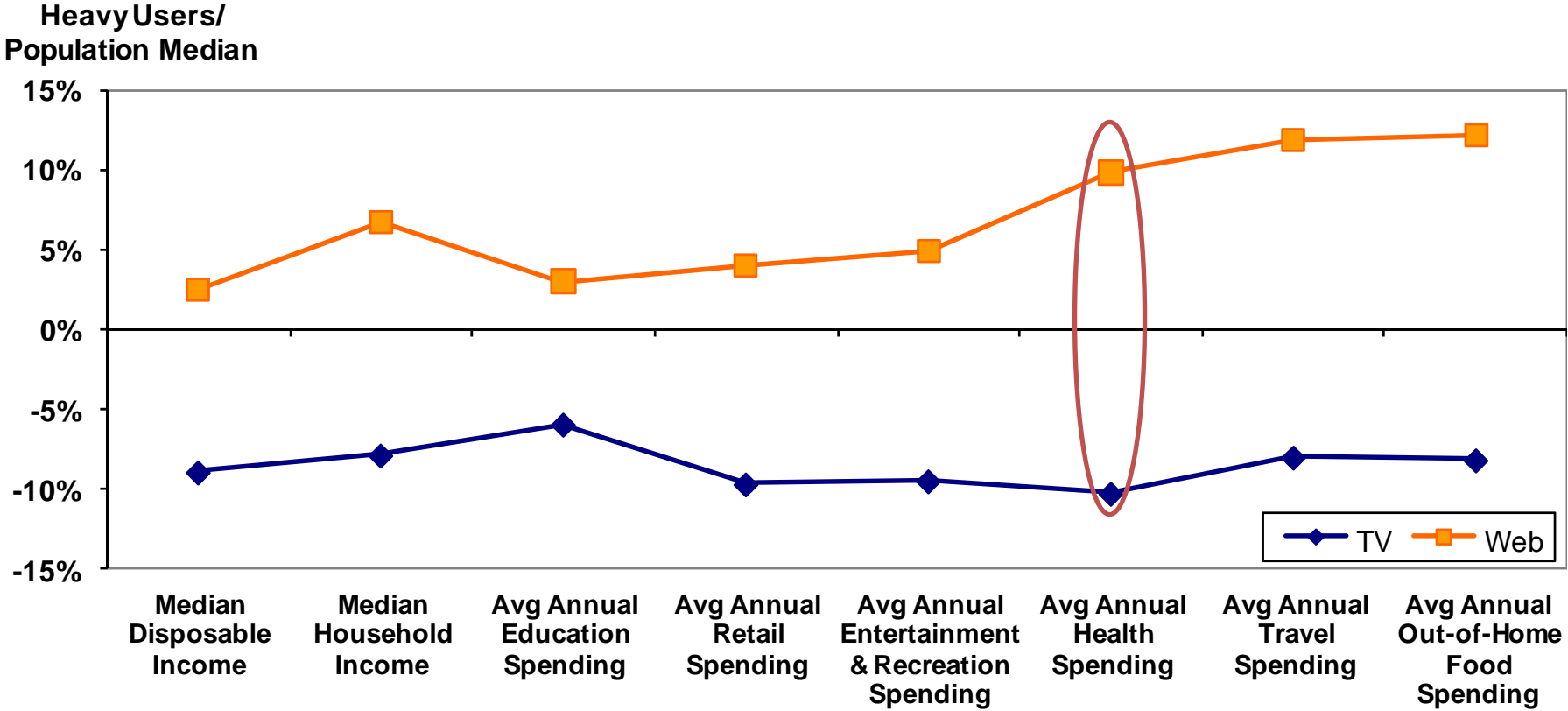
TV, radio and Web showed significant reach in all major day-parts

Incidence of Use

5 Ad Supported Media Reach by Dayparts



GIS analysis: Heavy Web Users Tend to Spend Consistently Over the Population Median



The Video Consumer Mapping Study

- Commissioned by the Council for Research Excellence – funded by Nielsen
 - \$3.5m
- 2 waves of research (Spring & Fall)
 - Core sample – 5 DMAs (350 participants)
 - Acceleration Sample – 1 DMA (100 participants)
- Status – wrapping up second wave
- Results – from Q1 09



But...it's not just about reach and frequency

- Marketing to the mindset
 - End users are conditioned by the increased control they have over their media experiences
 - The world is now open source and personalized
 - “My” media is less passive each year
 - Social networks, email, web2.0, DVRs, mobility etc.
 - Feeds a long-standing but un-satisfied set of wants



Web 2.0 and Me

- I'm Epileptic – where could I look?
 - Facebook (over 500 results on “epilepsy” – mostly groups)
 - Patients Like Me (apparently no epilepsy subgroup, but you know what it could do)
 - YouTube (whatever I want – about 4,250 videos)
 - Novartis Fluflix
 - Wikipedia (caution when editing!)
 - ~~– But how many epileptics actually engage?~~



The consistent themes

- You are in this environment whether you choose to be or not
 - Others talk about you – if you are relevant, liked, disliked etc.
- You have next to no control
 - Embrace that fact and feed on it
- Conventional “push-based” / advertising philosophies will meet with limited success at best (it’s not neutral territory)
 - Exercise: what would you do without advertising?
- The right to a sustained presence has to be earned
 - It’s not about you or the condition – it’s about the individuals
- ~~They know you have an agenda – acknowledge it and~~





Thank You
Questions /
Abuse
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