



**“Simultaneous Media Usage”:  
A Critical Consumer Orientation to Media Planning**

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## Abstract

This research study is the third in a series of surveys exploring the incidence of simultaneous media usage among a national sample of U.S. consumers. The research is based on 12,320 respondents who were sampled via an online network. The findings show that simultaneous media usage, i.e., multiple exposures to various media forms at a single point in time for the same media consumer, occurs in and among a substantial portion of the U.S. media population. The existence of simultaneous media exposures, created by multi-tasking consumers, is a fact in today's media marketplace. The existence of simultaneous media exposures undermines most current media measurement systems as they are defined as isolated environments. Thus, the challenge of this paper is for media management to re-think how media evaluations should be re-thought for the 21<sup>st</sup> century.

**Key Words: simultaneous, media, planning**

## Introduction:

In this paper, the findings of initial research into the development and occurrence of simultaneous media exposure are described and detailed. We define simultaneous media exposure as individual consumers being exposed to more than one media system or approach at a single point in time. In short, it describes the increasingly prevalent consumer activity of multi-tasking, e.g., being on line and watching television at the same time or reading the newspaper while listening to the radio or reading the mail while talking on the telephone.

In this paper, we describe a research survey conducted in March 2003. This was the third in a series of studies that have been conducted over the past two years. It is based on an initial BIGresearch online pilot study of 1,883 participants conducted during May 2002. That was followed by a fully executed investigation into simultaneous media usage and its effects on 7,800 respondents conducted in August 2002. Thus, this paper provides a summary of what has been learned in the three studies about this increasingly important media phenomenon.

### I. Rationale:

Today's fragmented media environment is characterized by an exploding number of media alternatives vying for people's time. Unfortunately, people still have only 24 hours in a day. This has forced them to multi-task or simultaneously use various media forms at the same point in time, simply to keep pace with events around them.

We all know that people often talk on the phone or face to face while listening to the radio or viewing TV. So, simultaneous media usage is not new to the consumer, and indeed, has been commented on by researchers in the past – as Robinson and Godbey (1997) noted, radio listening used to be an absorbing experience, which people would often engage in to the exclusion of other activities, whereas “*today, radio is almost exclusively a secondary activity, something we*

*listen to while doing something else. Television is beginning to go the same route...*” But media researchers and planners are still a long way from coming to terms with this phenomenon.

The growth of simultaneous media usage should have direct impact on the allocation of advertiser media dollars. This should occur since every current media measurement or estimation methodology assumes that each media exposure occurs in isolation. That is, one medium does not compete with another for consumer attention at a single point in time. Thus, each media exposure, even if it occurs at the same time as some other media exposure, is counted as a single event. Obviously, this type of simultaneous media exposure has or should have a major impact on how media advertising campaigns are planned and executed in the future.

The fact of simultaneous media usage also suggests some major re-thinking of how media is used in communicating with consumers is necessary. For example, under situations of simultaneous media exposure, it is likely that (a) one message becomes background or (b) both messages pass through one-another. Both options create a different metric of receptivity to programming and advertising, requiring media research and allocation to be re-considered in light of some of following issues:

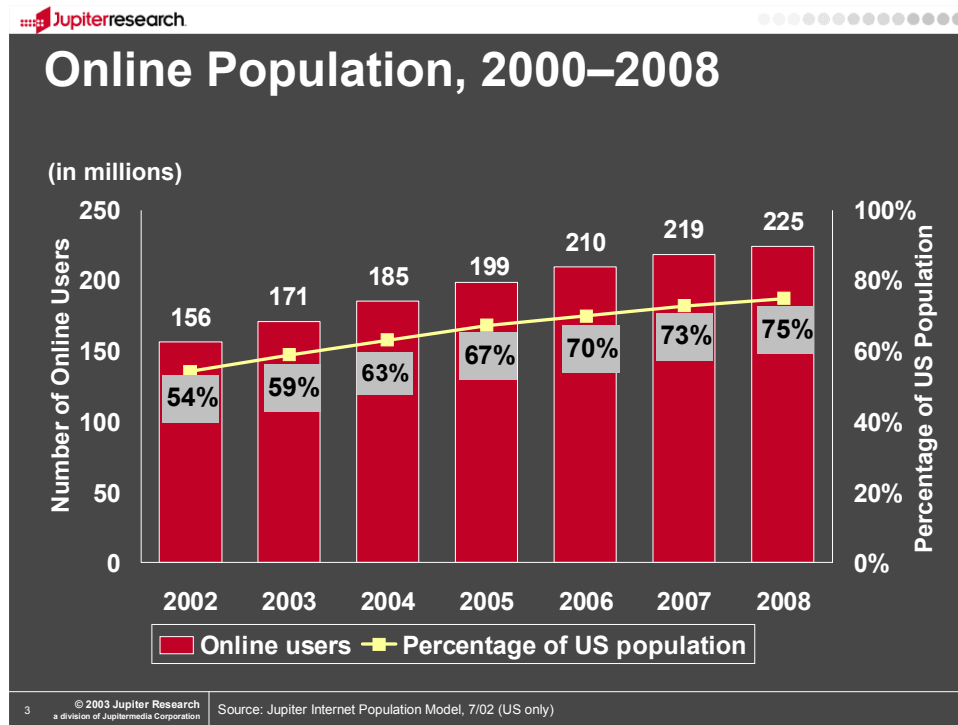
- Which media have the most power in simultaneous use?
- Which areas of interest command the most attention during simultaneous usage?
- Are there social/cultural differences in receptivity to simultaneous media use?
- What type of messages and length are most viable during simultaneous media use?
- Which media/and messages are more powerful with simultaneous usage?

Unfortunately, neither we nor media planners, media buyers, media research organizations or the media themselves have answers to these questions even though they challenge the present foundations of our commercial media systems. Our purpose with this paper is thus to raise the issues brought about by simultaneous media usage and to challenge the community to begin seeking solutions.

## II. The Study: Overview

The *Simultaneous Media Usage Study* (“SIMM study”) was conducted online in March 2003, with 12,320 respondents participating. The study employed BIGresearch’s proprietary technology that balances the survey results to the Census 2000 population. The sampling is a random sample of the U.S. population, who are online, in this case meaning, the populace which has access to email which is a free good for the US participants email, from home, work, libraries, community center and the like. People in our survey who have access to E-mail, reflect the U.S. Census at every age, sex, income level. The online population today is a “mass” media. (See Chart I). The study demonstrates BIGresearch’s sampling technique with its precision accuracy through computer intensive statistics achieving validity at the .01 level of variance. Our online population matches the media usage reports of other authoritative sources without significant difference, e.g. Harris, NPD, and Nielsen. It should be noted, BIGresearch proprietary technology is able to weight and balance samples against Census 2000 population and the technology dynamically weights and balances, in a self-learning environment, across each of the 14 age and sex cells. All cross-tabs are automatically weighted and balanced across cells. Thus, this study compares favorably with other, more traditional media studies using traditional research techniques.

Chart I



III. Object of Analysis:

- (1) The analysis of this study will demonstrate simultaneous usage as a significant determinant in creating behavioral indicators for new media consumption models.
- (2) Further, it will provide data and direction for new methods and studies on how media usage should and will impact future media planning.

IV. Revising Media Planning to Fit the New Media Landscape

While media technology and delivery capability have changed substantially, the methodologies used in media planning, that is, the process of aligning the goals of the marketing organization with the available media systems and alternatives, has not. When media planning was first developed, the media landscape was very different to the one we find today. To understand these changes, a historical review of the development of media planning provides a useful background.

## A. In the Beginning

Originally, media planning was quite simple. A limited number of media vehicles were available to the agency or the marketing organization. Generally they consisted of print (i.e., newspaper and magazines), with radio added in the 1930s. These media forms were commonly limited to local and national markets. Thus, identifying which media vehicles to use, their price and the scheduling details was a relatively simple task. Because there was limited knowledge about the audiences for the various media forms, the focus of media planning developed initially on the efficient purchase of media by the agency or marketing organization. That is, the more messages the better and the lower the cost per message delivered became the primary evaluation yardstick – a ‘media tonnage’ model’.

As media began to proliferate following World War II and television usage began to expand, the selection of media and the structure of media planning became more complex. The focus moved from media weight to media allocation. With that change came the development and use of statistical analysis to help identify audiences, their value and how media might be used in various combinations. Still though, the media planning and buying focus continued to be on efficiency as most marketers assumed a mass-consuming marketplace.

Three major factors greatly influenced media planning in its early stages. Those were (1) the borrowing of mass communication theory to provide a basis for understanding message diffusion and distribution. The common model was one developed by Schramm and Roberts that used the sender-→media--→receiver approach, (1961) and, (2) the acceptance of the Hierarchy of Effects models a la Lavidge and Steiner and Colley that hypothesized a series of steps that consumers went through on the way to making a purchase decision, i.e., awareness, knowledge, preference, conviction and purchase (1961) and (3) the development of statistical small samples that were then projected to the whole to speculate on audience size, make-up and value.

As a result of these assumptions, media planning has been greatly influenced by the work of Metheringham and Broadbent, who built models of audience duplication, all of which assumed separate and discrete media exposures that occurred over time (1964, 1965); by Keller and others on audience accumulation which assumed the audience for a particular medium accumulated over a period of time, not instantly (1966); Agostini on audience reach which was defined as separate individuals who received unique media exposures (1961); Smith and Krugman who hypothesized that a certain number of message exposures were required for consumers to process the media information (1962); and opportunities to see, that is, that there is no evidence that consumers actually were exposed to the media messages, only that they had an opportunity to do so (1975) by Kaatz and others.

#### B. One Central Assumption

Interestingly, each of these media planning pioneers were all focused on the same goals, i.e., how to reach the most attractive audience at the most reasonable cost. But, all media experts made one basic assumption in their planning models and discussions.... **that each media form should be identified planned and measured in isolation.** In other words, the assumption was that the audience member, who exposed him or her to an advertising media vehicle, did so in isolation of other media at the time of exposure. Thus, frequency research assumed discrete viewing, reading or listening. Duplication research assumed there were multi-media exposures but always at a different time. Exposures or opportunities to see measured media vehicles were based on households, not individuals. Reach measures were designed to identify unduplicated audiences. Media forms developed accumulation of audiences, not by multi-media systems. In short, media planning assumed that exposures to advertising messages through various media forms were unique experiences for the audience members with nothing else competing for attention.

These crude forms of media analysis were right for the times. When the major decision for an advertiser was whether to purchase space in LIFE, LOOK, SATURDAY EVENING POST or maybe LIBERTY, the only real question was how many people were exposed to the message in each vehicle, how much advertising those same people received, and whether or not there was audience duplication at some point in time. Today's problem is, while the media planning tools have stayed the same, the media forms, the consumer's use of media, the sheer abundance of media alternatives and formats and the rise of new electronic forms of interactive media have radically changed the way media is used and consumed by audiences.

### C. Simultaneous, Not Individual Exposures

Today, we find a media landscape that abounds in media forms. And, we find radically different customers and consumers who use media in totally different ways than our media planning approaches assume. And, most important, we find that all these changes are continuous and evolving. So, while our media planning systems are static, the media themselves and more importantly, the consumers who use those media are dynamic and ever-evolving. There is no question that today's consumers live in a networked, interactive, multi-media environment that is unlike any that has ever been seen before. One need only observe a teenager with text messaging capability on a cellular telephone to see how radically the world has changed. Yet, our media planning systems remain relatively unchanged. True, we have added more sophisticated analytics, but essentially the idea of individual exposure to advertising messages remains at the heart of the media planning system.

There has been speculation regarding a need for change in how media is planned and delivered. This is one of the first papers to openly challenge the basic assumptions that underlie most media planning models, that is, single point-in-time media exposures, with little or no interference from competing forms of media to discrete viewers, listeners or

readers. The fact is, single, point-in-time media exposures are no longer the case, as this study points out. More importantly, this likely hasn't been true for some time.

VI. Select Significant Findings from March 2003 SIMM:

Some of the findings from the study show:

- 32.7% of males and 36.4% of females regularly watch TV when they go online.
- 23.8% of males and 29.1% of females regularly go on online when they are watching TV.
- 16.8% of males and 22.2% of females regularly watch TV when they read the mail.

**Chart II**

<b>All Consumers</b>	
Respondents Selected: 12,320	
When you go online, do you simultaneously....regularly	
Listen to the radio?	18.3%
Watch TV?	34.6%
Read magazines?	3.7%
Read the newspaper?	6.0%
Read the mail?	13.4%
When you read the newspaper, do you simultaneously....regularly	
Listen to the radio?	13.6%
Watch TV?	23.8%
Go online?	7.1%
When you read magazines, do you simultaneously....regularly	
Listen to the radio?	11.4%
Watch TV?	16.2%
Go online?	5.2%
When you listen to the radio, do you simultaneously....regularly	
Read the newspaper?	10.2%
Watch TV?	7.3%
Go online?	16.8%
Read magazines?	6.3%
Read the mail?	8.9%
When you watch TV, do you simultaneously....regularly	
Listen to the radio?	3.0%
Go online?	26.5%
Read magazines?	6.4%
Read the newspaper?	9.2%
Read the mail?	11.2%
When you read the mail, do you simultaneously....regularly	
Listen to the radio?	11.7%
Watch TV?	19.6%
Go online?	9.0%

Our study showed that if we included “occasional” simultaneous usage, an excess of 50% of people are engaged in simultaneous media usage at any given time. Also, when asked about simultaneous media usage “how one pays attention”, only 15.9% of people surveyed said they do not engage in simultaneous media usage (15.7% males, 16.2% females).

While engaged in simultaneous media usage, 51.1% of respondents indicated they pay attention to one medium more than other(s) and 32.9% said they attend to each media equally at the same time. Clearly, this indicates that we have a vastly different consumer, some of whom are able to multi-task and multi-process information and material. Yet, our media models cannot or do not accommodate this dramatic change.

Time spent with media for TV/cable, radio, Internet, newspaper, magazines and direct mail usage is over 10 hours per day in our sample audience. If we were to engage media purely on an individual basis, between school, shopping, homework, sleeping, things that take one outside the scope of attending to media, there would not be enough hours in a day to accomplish everything.

Simultaneous usage is a fact from the experiential viewpoint of the consumer. Further, it is actually confirmed by the silo measures of Arbitron, Nielsen, and Interactive Media when matched with our findings. Insofar as one totals usage of Arbitron’s radio, Nielsen’s TV, and Interactive Media’s online with our time, spent individually and in total, there is little difference. When one adds them together, over 10 hours per day are spent on media, which is in-line with our study. This means simultaneous media is in play but only indirectly measured by the above vested interest companies.

Additional insights from our study that should influence media measurement and planning are the following: When asked: “When you watch TV and a commercial comes on, what do you do?”

- 15.3% of population regularly leave the room
- 30.2% of population regularly mentally tune out
- 30.1% of population regularly watch, but not with full attention

- 30.8% of population regularly channel surf
- 32.4% of population regularly talk with others in the room or on phone

The above finding clearly adds another dimension to simultaneous media usage in which non-media activities are engaged in concurrently along with the media exposure itself.

In media planning and measurement, it is equally important to note that media usage is changing dramatically in addition to how the media is processed. For example, the importance of “who says” vs. “what is said” is totally ignored in most of our media planning methodologies. Word-of mouth is becoming a critically important result of media exposure. Some examples from the study reveal:

A. When asked, “When you read, see, or hear an ad, which influences your purchasing decision?” the concept of ad relevance seems to be thematic, as 56.2% of population indicated, ‘the ad made me think about how the product would be useful to me’.

B. When asked, “How important are the following media in influencing your purchase decisions?” word of mouth was first with 36.5% of the responses, coupons were second with 23.1%, third was in-store promotion with 15.1%, and TV/cable was fourth with 14.3%.

VII. In our study, 14.1% of the populace regularly seeks advice on the purchase of goods and services and 23.0% regularly gives advice to others on the purchase of goods and services the fact remains that word of mouth is not created *ex nihilo* but has a context out of which it is born. Therefore, any correlation between preference for giving or seeking advice and media consumption habits would or should have important marketing implications.

Implications of the Study for Media Planning:

- Based on the March 2003 SIMM study, we believe the following areas need to be considered by media researchers and planners:

- Media allocation needs to allow for simultaneous media day/part usage, as well as foreground/background combination for message effect.
- Allocation must follow simultaneous media usage to be able to understand the social/cultural differences in how media is used and consumed. This has major implications for media allocation.
- Simultaneous duplication is occurring in ever increasing numbers
- Cumulative audiences occur immediately, not over time – Does this change our definition of reach and frequency?

#### VIII. Discussion:

Our findings have established that simultaneous media usage is a fact. The research has come from the experiences of the individual, in their everyday behavioral activity. In excess of 50% of all individuals are engaged in various combinations of media through the day, whether it is being online and watching TV, listening to the radio and being online, reading a magazine and watching TV, reading the newspaper and watching TV, or reading a magazine and being online, etc., etc.

It has also been determined that not all media are equally weighted as watching TV and going online, and online and having the TV on become, foreground and background for each. Interestingly, our **findings suggest the prime time for simultaneously watching TV and going online, and its converse, occurs between 7-11 pm. Those are generally considered the prime time for TV exposure. Yet, it is clear that even if TV exposure is greatest during this time period, it is commonly in combination with some other media form.**

So what can or should be done?

It is our position that better media allocation will require better tools to address the inter-coupling of various media as intermittent users engage in their use. Clearly, our data shows that that SIMM is a fact and is significant in the daily lives of a substantial number of consumers. There are multiple

applications for SIMM in the world of retailing and we are working with many of them at this in order to achieve higher return on investment with their advertising dollars.

Several applications of SIMM are:

- Determine the simultaneous media usage between media habits of consumers by retail channels and day/part, and then compare the usage to competitors.
- Determine best type of message in light simultaneous media usage by retail channels.
- Determine which foreground and backgrounds of simultaneous media usage to find point of distraction.
- Determine the simultaneous media usage of consumers who prefer word-of-mouth advertising by retail channel.
- Determine the advice givers and seekers by simultaneous media usage by retail/channel.

The above applications are enhancing communication effectiveness while reducing costs. Further research will enable us to create not only the model for advertising R.O.I. for traditional but new media technologies.

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