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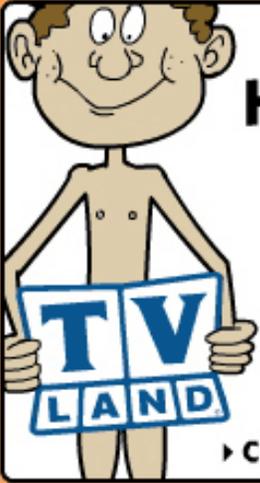
Prepare for Summertime Behavior

Warm Weather, Longer Days Entice Consumers Away From TV, so Find Antidotes to Season's Outdoor Fever

By Mark Dominiak

Special to *TelevisionWeek*

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When May gets into full swing, big goings-on in the world of television have a tendency to grab hold of a media planner's attention. May sweeps and season finales certainly generate buzz. Then there are the yearly upfront presentations-complete with their news, hype and canapés-which many of us attended just last week.

But there's another noteworthy event of concern to media planners: summer. During the summer consumers significantly change their behavior when it comes to media. The catalyst prompting change in consumer behaviors in second and third quarter is the onset of warmer weather. Why? As soon as the weather breaks, consumers can't wait to get outdoors.

But this annual shift in consumer media consumption behavior doesn't get the attention it deserves. In a perfect world, planners could keep tabs on the industry dynamics and consumer behaviors that drive media strategy and execution. But at this time of year industry dynamics are so much at center stage they dominate schedules and conversation.

Focusing on factors like sweeps and the upfront is an important activity and one to which planners and buyers should assign high priority. But they must take care not to fall into the trap of being too inwardly focused. It's also important to invest some effort outward, taking the opportunity to put themselves into consumers' shoes to get a better understanding of what motivates their media behavior at this time of year.

Focus on the Consumer

Failing to understand the behavior changes present at this time of year is a mistake many planners make, as a result delivering less impact than may have been possible had these behaviors been accounted for in the planning process. So amid the hubbub of current industry tumult, here's an opportunity to reorient to what's going on with consumers.

"Why bother?" planners may ask. "My summer media plans are long ago completed." That may indeed be the case. But since many of them will be planning '06 summer efforts in the coming weeks, why not take the seasonal opportunity to refresh memories, better inform plans on the drawing board and potentially add impact for brands.

Two aspects of changing consumer media behaviors during the summer season bear discussion:

- Evidence of changing behaviors in various media
- What planners can do to take advantage of summer behavior changes

The changes don't affect the entire country all at once. Consumers in Southern states are the first to break their cabin fever, typically by early April. By mid- to late May warmer weather has generally migrated to the last of the Northern states.

It's not as though the basic nature of what consumers do changes profoundly. Consumers still invest their nonwork/sleep time in chores and leisure activities. And they still consume media during that chore and leisure time. The difference is that the types of media that complement indoor activities aren't as effective when folks are out working in the yard, swimming in the pool, at the Little League field or on the road to Yosemite.

Evidence of Change

With time spent on activities shifting from indoors to outdoors, one would expect television as the primary indoor medium to take a summertime hit. And it most certainly does, primarily in prime time and somewhat in overall HUT levels.

HUTs across total day don't show dramatic ups and downs. On a graph of the 2003-04 season, the total day U.S. household average audience looks like a pretty straight line, rising a little in winter months and dipping a little during spring and summer.

Prime time is where differences start to become evident. Overall HUTs enjoy a share of 60-plus percent from the beginning of the broadcast season until about April. At that point, HUTs drop off to consistently less than 60 percent, even approaching 50 percent some weeks in the summer.

More interestingly, consumers seem to take the summer television break from prime time on the seven broadcast networks. During the heart of the season, the seven-network (ABC, CBS, NBC, Fox, UPN, The WB and Pax) U.S. household share bounces around between 40 percent and 50 percent. But in summer months shares are consistently below 40, threatening to dip under 30 in some weeks.

It must be noted that the data do indicate the relative strength of cable as a viable summer television choice, bucking the trend

with higher HUT levels in spring and summer months.

Positioning the Plan

The best way for planners to find opportunities created by changing consumer behavior is to place themselves in the frame of reference of the active summer consumer. What types of activities will consumers work into their summer routines? Are there any media opportunities that link to those activities? What characteristics will draw consumers to particular media choices during the summer months?

Here are a few summer-month opportunity areas that flow directly from thinking about the consumer's perspective.

- **Consumers coming home late:** If consumers are spending a good deal more time outside during the warmer months, it's likely they will not arrive home until later in the evening. Later sunsets almost guarantee this behavior. The implication for television is that dayparts in the mix should be prioritized by their ability to reconnect with consumers when they are home, preparing to engage in or returning from activities.

That being the case, late prime makes better summer sense than early prime. If consumers are out and about enjoying life until the sun sets, they are unlikely to be in their easy chair at 8 p.m. One might even more boldly state better opportunity lies later in the evening with late news and late fringe. Earlier, consumers might be distracted by chores upon their arrival home.

- **First-run versus reruns:** Another summer television tactic that makes sense is choosing first-run over repeat programming. If a consumer is faced with a summer choice of sitting on the deck or taking a bike ride or a walk versus watching a television show, the odds of that consumer selecting an hour in front of the set increase when the program option is something that hasn't aired before.

Recent years have seen more first-run options than in years past. The old summer standby is still sports. Live sporting events are always fresh, and summer has plenty of options from which to choose—baseball, golf and NASCAR being just a few. And not only do those sports offer good original summer programming fare, they offer outstanding in-stadium advertising and at-stadium experiential messaging opportunities, especially when you also consider all of the minor league franchises.

The networks are also starting to consistently deliver interesting original summer program options in prime time. Just unveiled at the upfront were a number of interesting properties. On The WB, there's the Ashton Kutcher/Jason Goldberg creation "Beauty and the Geek," which pairs "plain dorky" Mensa-quality guys with "bubbly, beautiful and brainless" female partners.

ABC has a host of summer offerings ready to roll. "Welcome to the Neighborhood" brings a variety of not-your-mainstream-families to compete for a home in a cul-de-sac by trying to convince the very opinionated neighbors to let them join the neighborhood. There's also "Brat Camp," another reality offering that sends six out-of-control teenagers to a boot camp-style program to try to turn their lives around. There's also "Dancing With the Stars," "The Scholar" and "Empire" to round out the offering list.

- **Cable versus network:** It's hard to ignore the fact that cable maintains viewer strength through the summer months. The data seem to suggest that when consumers choose to kick back with summer prime-time fare, cable is chosen more often than network.

The common theory is that, for September-to-May network viewers, summer cable fare is fresh programming, since they have not sampled it during the first part of the season. That may be true, but whatever the reason, consumers who are found in front of the set during summer months tend to more often watch cable programming. More efficient summer/cable costs per thousand seem to make cable an attractive choice for planners needing summer television weight.

- **Out of home:** Since consumers are out of home during summer months, include wireless as a potential out-of-home option. Alternatives to reach consumers with wireless messaging are rapidly growing and powerful.

The big changes that start occurring in consumer media behaviors this time of year are an important consideration for planners that should not be overlooked. If planners appropriately put themselves in their target consumer's shoes to understand why media

behaviors are changing, they can develop plans that keep up with active summer consumers and deliver the best possible impact for brands in the marketplace.

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