Chapter 6
Evolving Media Metrics from Assumed Attention to Earned Engagement

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ABSTRACT

This chapter stems from recent discussions with academic, advertising and channel researchers.[1] In this review, four types of issues relevant to new agendas for advertising research are highlighted: the legacy of metrics based on the interrupted narrative model of advertising and assumed attention; real advertising campaigns as a source of innovations in developing new metrics for earned engagement; the interdisciplinary theoretical foundations for studying engagement and persuasion in advertising; and the need for advertisers, media developers and academicians to collaborate and expedite the creation of metrics to rationalize the monetization of new media used for advertising. Measuring engagement and persuasion in the current media ecology requires metrics that consider simultaneous media exposure and continuous partial attention in the context of a participatory culture and multifaceted objectives for advertising campaigns.

INTRODUCTION

New technologies, consumer control, media fragmentation, and business pressures are contributing to a media culture of continued partial attention (Brint, 2001). This trend has produced renewed interest in understanding the dynamics of engagement and using them to execute successful, persuasive advertising campaigns. The changes produced by this trend have important implications for the questions, methods and metrics of advertising research.

The field of advertising has traditionally differentiated purchased media (space in the media is purchased by advertisers) and earned media (space in the media is acquired without payment through journalistic and public relations efforts.) In a like manner, a distinction can be made between assumed engagement, in which audience metrics count the number of people who could

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potentially pay attention to a message, and earned engagement, in which the audience engages with the message in a real or imagined way because the message is perceived to merit interaction.

Legacy audience media metrics, such as CPM (cost per thousand), CPP (cost per person), and CPI (cost per insertion), arose from the desire of channel developers, advertisers and their clients to quantify cost/benefit of media purchases. When they were developed, these legacy metrics assumed that each media channel was delivered to its audiences (individuals, family, etc.) in a singular fashion. In recent years, the range of media that advertisers can purchase has expanded. The ability to personalize messages and integrate them across media is rapidly evolving. The participatory media culture has spread globally. In short, media and its use have changed. The old metrics–although widespread in their use–are simply not sufficient for today's advertising delivery methods and the multi-tasking and multi-channel involvement taking place.

The evolution of those metrics has already begun. The traditional language of measured media measurement is being expanded with new metrics–POI (point of influence), POP (point of purchase), POC (point of consumption), buzz, and social channel indicators. Some of these are experimental; some are becoming accepted; others have yet to be invented and defined. The hope of advertisers and their clients, channel developers and researchers is that new metrics will provide actionable measures of the impact by persuasive messages on intended attitude and behavioral changes. With valid and actionable metrics, new media channels can be appropriately priced and advertisers will have a rational basis for recommending advertising strategies and media buys for their clients.

The vested interests of advertisers, their clients, channel developers, and academic researchers are somewhat different, yet all may benefit from valid and actionable new metrics. Academicians are exploring new constructs that help to explain engagement and persuasion processes in the context of continuous partial attention and a participatory media culture. Channel developers are looking for pricing models that reflect the value of audience engagement they can deliver. The agency business is in the midst of an urgent shift to realign with the cultural and business environments. With limited time available for research and reflection, practitioners make generalizations based on anecdotal evidence.

Establishing new metrics requires time and involves intellectual and operational challenges. The process is multidimensional and complex. Collaboration across these different perspectives is required if the new metrics are to be relevant across the industry.

In this time of change, collaboration among practitioners, channel and technology developers and academicians is urgently needed to accelerate the co-creation and migration of metrics from a model that assumes the engagement of an individual in an interrupted narrative to a model of earned engagement in an always-on, multi-tasking environment. In this collaboration, academicians can leverage case studies of real advertising campaigns to generate new, testable hypotheses. Practitioners can deploy academic insights to shortcut trial and error processes as they design and implement campaigns.

EVOLVING MEDIA USE AS CONTEXT

For several decades, broadcast advertising and media metrics have been based on the interrupt model of traditional narrative media, in which advertisements–persuasive messages that were intended to inform and persuade–interrupted the audiences who were engaged in the broadcast narrative. When there were only a handful of broadcast channels–e.g., radio in '30s and '40–writers initially wrote those shows (such as Fibber Magee and Molly) in order to give their sponsors an opportunity to promote their products. Writers of these shows used the interrupted narrative model for the timing of their commercial messages, and advertising agencies developed around the commissions earned from these media placements.

In those days, there were roughly a dozen markets, each with millions of persons, bringing both a receptive attitude and an expectancy of relevance, along with their undivided attention to the media experience. Now the more likely scenario includes millions of markets with approximately a dozen persons in each (Anderson, 2006). Attention to the constructed, linear narrative has evolved to periodic and partial engagement across multiple and simultaneous media that are user-centric, user-defined, and often user-generated. The objective of the old broadcast model was to reach an aggregated audience. Objectives for new media emphasize identifying and engaging niches of fragmented markets with each fragment expecting relevancy in a media ecology that includes personalized narrowcasting.

The growing use of digital technologies, personalized media and participatory expectations has had a significant impact on legacy media (newspapers, broadcast TV and radio) and their metrics of reach and frequency. In 1988 television channels reached 67% of all TV viewers. In the early 90s, channel cumulative viewership dropped to 53%. In 2003, it dropped to a 38 share, and a channel needed a minimum 12 share rating to keep a show on the air. In 2007, the top ten news websites had a larger share of audience than legacy media in the United States (Burns, 2008). In 2008 a major channel won the primetime ratings war with an 8 share rating, roughly 17 million viewers (Russell, 2008a).

Simultaneous media use by multi-tasking consumers is a fact in today's marketplace. In a landmark 2003 study, significant use of TV and Internet simultaneously was documented, also showing significant generational differences in whether people attend to each medium equally or to one more than the other (Pilotta, Schultz & Drenik, 2004). Younger consumers in the Millennial generation, born between 1978 and 1996, use media differently than people born earlier. The use patterns of this cohort have had a significant impact on media (Ito, 2009). Studies have documented that Millennials used media for an average of 10.5 hours a day in 2008, compared to 7 hours a day in the '90s, and that they used different media than previous generations (Lenhart et al., 2007).

Consumer-generated media–such as blogs, wikis and social channeling sites–have gained wide use and credibility by this segment, which has essentially defined social channels–41% use MySpace, Facebook, or similar channels daily. Millennials prefer the computer screen–the 2nd screen–to the TV screen. Many users text message regularly on what is now called the 3rd screen–the mobile device, and forty percent said they IM–instant message–every day (Lenhart et al., 2007). Millennials multi-task at an almost biological level, and their media engagement represents a complex periodicity.

Additionally, multi-channel marketing strategies have become standard practice; and permission marketing, Internet selling practices, and social media have been integrated into many strategies and campaigns. Spending on alternative media hit $73.43 billion in 2007, a 22% increase over 2006, and was forecast in 2008 to increase 27% over 2007 levels of spend (Stevenson, 2007). In the four years between 2005 and 2008, audience engagement in user-generated video grew from slightly over 3 billion in 2005 to 35 trillion views in 2008 (AccuStream, 2008).

Although the world has become more transparent to both channels and advertisers, it has also raised the bar in terms of understanding engagement, impact and value. Previous media metrics and their measurements assumed that each media exposure occurred in isolation. A more accurate understanding of the current media environment requires that measurements of attention, engagement, receptivity, persuasion, influence, and effectiveness acknowledge simultaneous media exposure.

Advertising has been described as "the art of getting a unique selling proposition into the heads of the most people at the lowest possible cost" (Reeves, 1961). It has been described as an activity that "increases people's knowledge and changes people's attitudes" (Jones, 1990). Advertising is a meaning-generating discipline and industry; advertising gives meaning to products and services. Over time, changes in both media and advertising practices reflect the cultural moment and how that changes over time. Additionally, changes in the way advertising messages are consumed reflect changes in how people relate to each other and to their media, as well as to their brands, products and services.

FIELD EXPERIENCES AND INNOVATIONS IN NEW METRICS

Advertising planners, creative professionals and media buyers are hired to devise and implement advertising campaigns that change consumer behaviors and attitudes, in the context of cultural milieu and business objectives. Their professional reputations are at stake as they work within time and budget to develop insights and integrate them into campaign strategy on behalf of their clients.

The responsibility of gathering insights and developing strategy to guide the development of creative expressions, as well as the choice of channels and media, is often assigned to advertising account planners. Planners strive to identify the right message–what to say and how to say it, the right time–when to communicate, and the right place–where to say it. They evaluate various aspects of the decision process, the media, the influencers, and the brand that are critical to producing better targeting, messaging and results for products and brands (Burns, 2008).

It's not surprising, then, that the metrics used in developing these insights and recommending strategy reflect the values held by these and other practitioners –channel developers, creative developers, media planners, brand managers, and marketers. Innovations in metrics used by these professionals in real campaigns also reflect the expectations and growing demand for accountability in the field. The evolution of new metrics provides early clues about how the advertising industry is changing.

Field examples of real advertising campaigns, shared by workshop participants, described new metrics for new media and included the research that was conducted to guide planning, as well as assessments to document effectiveness of the campaign objectives. The methods and metrics used by practitioners in these field experiences reflected the clients' and campaigns' objectives, time and budget. Results of these evaluations were intended to provide prescriptive feedback–results and insights that could be used in making the next round of decisions to reduce the risk of financial expenditures and improve the effectiveness of results. The intent to prescribe decisions that align with business objectives differentiates the research conducted by practitioners from the research conducted by academic researchers, which has a more descriptive intent and seeks to explain phenomena in the context of a field of knowledge.

Some practitioners reported that their campaigns relied on a single, well-defined metric to demonstrate success, but most used several different indicators, according to the campaigns' objectives and the media used. Developers of new media channels, for example, added awareness metrics to prove the effectiveness of new channels. Retailers, on the other hand, only believed those measures when they saw they were consistent with sales uplifts.

A single, focused objective can sometimes be documented with a single, focused metric. For example, a retail coupon program the key metric was coupon redemption (Stinson, 2008). The key metric in a sustainability and energy utilization program is behavior change, evidenced through a reduction in energy use (Armel, 2008).

However, for campaigns with more complex objectives such as loyalty or brand building, evidence of success requires several metrics that each address an aspect of the customers, their contexts, the media used, and the scope of changes sought. The more complex the objectives of the campaign, the more complex are the metrics needed to assess interim results and overall success. Suites of metrics, as well as individual metrics, gain greater meaning when changes are measured over time.

When the Mojito Party campaign for Barcardi resulted in a seven percent uplift in off-premise sales, marketers named it the "social butterfly effect," referring to Lorenz' concept in Chaos Theory (Gleick, 1987), and recognizing the channel effect of influencers in the social context. Invited to a local party by friends, consumers sampled a rum drink, called a Mojito, learned how to make it, and received the supplies they needed to introduce it to others. The active ingredient of this campaign was personal recommendation, supported by new media with collateral print and online information. The trusted metric was increased sales (Hayden, 2008).

However, new metrics for new media are emerging. They reflect variety in both campaign objectives and the use of new media. Campaign objectives continue to include awareness, familiarity, affinity, recall, preference, purchase and repeat purchase, but they also include social channel effects, recommendations and influence. New social media, mobile media, ubiquitous media, and the participatory context - surveys, polls, contests, elections, sales, redemption, requests, recommendations, and advocacy - have contributed to both the ability to measure interim results and the requirement for doing so.

Several innovative measurements have been pioneered as measures of the success of advertising in influencing the consumer decision pathway; they address one or more elements of the media, the consumer, or the context. Since many of these new approaches have been introduced in the context of real advertising, it is not surprising that they reflect the business value of actionability–the ability to apply results of those studies (or insights generated because of them) in order to prescribe strategy or make decisions. For example, the traditional change model of smoking cessation has, for many years, included the phases of precontemplation, contemplation, action, and maintenance. Based on qualitative research with smokers who were trying to quit, account planners modified this model with a middle step of building resolve (desire, acceptance, and confidence). A communication campaign was designed around the key element of resolve–re-learning triggers. The registration of smokers intending to quit at www.becomeanex.com was used as an indication of campaign success and used to document that the campaign generated resolve (Giles, 2008).

In another campaign, developed by the GSD&M agency in Austin, Texas, the account planners responsible for the Air Force recruitment campaign introduced changes into the traditional recruitment model of lead generation, career exploration and enlistment. To increase the pool of persuadable youth, the agency used experience marketing to first inspire youth and their mothers, changing the way both thought and felt about the Military, then followed with career exploration to the stimulate questions about enlistment, before any of the conversations with recruiters who affirmed interest and guided enlistment. Pre and post attitudinal measures documented the effectiveness of the inspiration-oriented experiences. A higher proportion of enlistments resulted from inquiries, presumably because the youth experienced less resistance from their mothers. The client called it a success and renewed their contract with the agency for a second 10-year period (Giles, 2008).

When over 250,000 unique visitors logged into the online Dell Lounge twice or more, following experiential marketing at Austin City Limits, advertisers and clients called it a success. Rights to the Justin Timberlake Tour at the Austin City Limits Music Festival had been purchased by BBDO with the expectation that 12,335 people in the audience every night would have the potential of hearing an advertisement. Under a promotional services agreement with Dell, the objective was identified of getting the message out into crowd. Street teams mingled through the audience and surrounding areas to hand out fliers encouraging SMS (text messaging) to get backstage, enter an arena surrounding the stage, or enter contests related to his music. Before his concert, a large video-taped image of Timberlake on the Jumbo screen promoted the importance of Dell computers in his life, and the audience was encouraged to go to the online Dell Lounge to register to win an autographed computer. Page views on the blogs of invited bloggers reflected the viral spread of news of the concert and the contest. The primary objective of the campaign was to help make Dell Computers a lifestyle brand; however, since Dell computers are sold online, the audience multiple of nearly 200 times the concert attendance commanded great respect (Hayden, 2008).

Digital technologies give advertisers greater opportunities to automatically collect information about audience exposure and response to the media delivered. They provide greater options for the creation, delivery and adaptation of communications campaigns; and tracking can be specific to the user, event and product. For example, digital screens with context-aware advertising have been introduced into waiting rooms, elevators, bars, stores and gas stations. Sensors and feedback to database-driven content systems allow advertisements on these media to dynamically change price or message (Russell, 2008b; Russell, 2009), personalize content (Cox, 2008), reflect changes in individuals' social channels (Madhok, 2008), and conform to the context (Cox, 2008) in real-time. These adaptive media have the capacity to engage and persuade consumers either in tiny bursts of on-the-go time or while consumers are waiting in the retail establishment. They can be used to deliver advertising at the point of purchase, the point of influence and the point of consumption.

Narrow-casting, the ability to send a specific message to a specific location, allows customized messages to be delivered to individual screens in public (store, bars, elevators) or private (mobile phones, automobiles) places. Both quantitative and qualitative methods have been used to measure the effectiveness of out-of-home narrowcast advertising. At the time of this writing, many of the narrow-casting channels are still in pilot or preliminary stages. Channel equipment providers have cited studies using measures of awareness and recall to document that people noticed video messages inside bars (Burns, 2008), convenience stores (Russell, 2008c) and outside at the fueling stations (Cox, 2008). They have used those measures to claim that ads placed in the new out-of-home channels worked. However, claims became believable to retailers only as increased sales of the advertised products were observed at the locations testing the channel and its ads.

Digital technology also brings narrow-casting to individuals–to their personal spaces (cars and homes) and their personal devices (computers and mobile phones). User-influenced content and events, such as contests, polls, sweepstakes, games, privileged access, and challenges, have been implemented, with quantitative measures of consumer participation used to measure their effectiveness. Experiential involvement that invites online consumer dialogue has been paired with media buys, with results showing that user-influenced and generated dialogue trails (and tracks) the scripted dialogue of media buys. Among the pairings of media buys and user involvement, online voting in response to real events and online media has been observed to generate the very strong results. (Hayden, 2008).

The metrics that track assumed attention are evolving and are now specific to particular aspects of engagement. Measures of reach (cost per thousand or CPM) continue to be used for online communications in which awareness is the primary objective. Page views and click through rates (CTR) have become accepted metrics for evaluating audience attention in online channels, and cost per click (CPC) is considered by some to be a reasonable way to evaluate ad effectiveness. Website visits and page views can be useful in comparing lift versus control markets. These metrics are easily tracked by practitioners through dashboard views that are updated on a real-time basis. Alternative creative expressions (tag lines and copy) have been tested for their effectiveness, and results have been used to optimize active ad campaigns by suspending the laggards and giving greater visibility to the winners. But if the objective of the ad goes beyond attention (and many campaigns are built on objectives that include entering the competitive set) brand-building, or affirming brand choice, other considerations are needed.

If advertising strategy includes test and control (for example with DMA or other market clusters) or seeks to compare exposed versus unexposed consumers or if the advertising objective is engagement or conversion, a number of other emerging metrics can be used to evaluate success. Search behaviors, incremental navigations, and customer signups are becoming acceptable measures to evaluate engagement and conversion. Standard reports of these include the identification of the highest and fastest gainers, changes in the frequency of queries quarter by quarter and year to year, as well as comparisons of how queries have changed - by geography and over time (Konar, 2008). Queries can also be used as an online measure of an offline campaign. The 2006 Pontiac TV ad campaign, for instance, included a call to action for online search (Hayden, 2008).

Additionally, search terms have been used to document consumer requests for information and reflect persuasion by indicating the evolution from awareness to investigation to conversion. Query volume is continuous, so search analysis can provide a flow of metrics to reflect audience engagement and inform campaign decisions. Interactive online dashboards provide advertisers with continuous metrics and multiple levels of analyses to pinpoint opportunities during the course of campaigns. New functionality in metrics dashboards allows planners to share both the metrics and their perspectives on its meaning (Konar, 2008).

Other interim measurements used to document the effectiveness of advertising in promoting consideration are based on recommendations–advocacy and word of mouth. For example, an advertising campaign conducted for MiniCooper created a website on which owners were encouraged to communicate with each other and on which they were able to direct of the conversation. A sense of community with other owners developed and drove online advocacy, measured using the online promoter score. An online promoter score was calculated by plotting measures developed from coded language and online conversations of CGM (consumer-generated media, also known as consumer generated content or user-generated content) and against sales data. At a two month lag, this metric of advocacy was shown to be a predictor of sales (Hayden, 2008).

Earned engagement is reflected in the power of online social channels to create influential recommendations. While there have been fundamental challenges to the analysis of CGM, buzz–a form of engagement and a result of engagement–can identify engaged individuals, indicates the degree of engagement, and predicts consumer response, given that engagement. Using every message as a valid data point, taking place in the context of their online social selves and social channels (their public profiles, wallpaper, group memberships, and friends), the text of blog posts and their associated comments reflect consumers' engagement. Buzz reach is a more complex metric than the traditional reach measures; it includes not only the number of eyeballs potentially exposed to content on a given page, but also on how much of that page is relevant to a product or brand, and how many people are tracking that page. Caution is needed in interpreting buzz as engagement, however, because engagement is multidimensional. Buzz relies on open data and reflects conversation–inherently complicated with slang, irony, nicknames, and jargon. Using buzz metrics demands a constant balance between precision and ambiguity. Language offers many ways of referring to one thing, and language is easily misinterpreted (Niederhoffer, 2008).

Analyzing buzz –in corporate communications (Veda, 2008) as well as at the consumer level–requires provisions for managing data quality and insight for interpretation–first becoming intimate with the data, drilling down, and taking different perspectives before making interpretation. Data for analysis can become multidimensional with methods such as weighting the source (influence), attaching metadata from traffic (how many people are viewing, how much talking, unique audience, audience growth rate), and measures of how many people are linking into the messages (authority), how quickly people are citing, and average time between linking. Insightful analysis further requires consideration of the dynamics under the buzz–the valence of the discussion, intentions, and peaks (Niederhoffer, 2008).

Many of the new buzz metrics are descriptive. To get deeper, more diagnostic clues about engagement, linguistic analysis can be added to the analysis of buzz. By measuring the types of words used, analysis reveals how individuals and groups of people, events, products and brands are related to each other. Linguistic style is closely tied to individuals' psychological and social states. In fact, studies have shown relationships of linguistic style to emotion (depression, deception), biological states (testosterone), personality (neuroticism), cognitive style (complex thinking), and traditional age, gender and class demographics (Pennebaker, Booth, Francis, 2007).

Another method of studying linguistic markers is sentiment analysis. Sentiment analysis requires highly nuanced interpretations and represents a complex set of evaluations and uses indicators such as pronoun use (shared reality and social connection), verb use (particularly emotionally-valenced or recommendation verbs), syntactical references, and style (immediacy–short words, first person pronouns, low number of articles, positive emotion, verbs more than nouns). Sentiment analysis of buzz and recommendations provides important indicators of engagement, intimacy and social connection to brands, products or services (Niederhoffer, 2008). Linguistic markers and sentiment analysis can be used to diagnose engagement in online conversations and evaluate the customer context (Pennebaker & Niederhoffer, 2003).

Prescriptive metrics are also needed to monitor the performance of campaign communications. In a multi-tasking and multi-media ecology, evaluating a campaign's effectiveness in engaging and persuading the audience requires a corresponding complexity in the metrics used. Managing the customer context involves reaching the right audience at moments of relevance, integrating and reinforcing across media and across time, creating and using interactive, engaging ad formats, and measuring and optimizing to deliver performance. Several early innovations in measuring aspects of this complexity include Reach-through-relevance, Screen-consumption-quotient, Power-Score, and Serios. "Reach-through relevance" is an approach that takes advantage of market fragmentation by crafting an advertising platform that provides multiple (and possibly simultaneous) contact with consumers who are multi-tasking across channels. Identification of these practices has been guided by a combination of old and new metrics, measuring both assumed and earned engagement along the persuasion process, as well as by its ultimate objective. The experience of one leading online channel suggests that two practices are indicative of effectiveness in achieving reach-through relevance in online advertising (Konar, 2008).

The first of these practices addresses multitasking. It integrates complementary content and formats across media with messages that reinforce relevance and desirability. A call to action in the Heinz campaign, based on engagement with the brand, drove the submission of qualified CGM contest video entries, hours spent watching submissions and interacting with the branded media, as well as a visible lift in ketchup sales.

The second practice, interactive and engaging ad formats, uses context-aware gadget ads to display content differently depending on the site on which it appeared. The content of the ad is synched to the content of the site and is presented on the basis of search, as well as the sequence and pages visited prior to the ad site (Konar, 2008).

The third practice, Screen Consumption Quotient, is an index for variable pricing of media space based on the number of people potentially exposed to the ad and qualified by the business value of an individual customer (Madhok, 2008) or of a particular audience (Burns, 2008). It has been developed to measure a mixture of media across a number of different market segments.

A forth practice, known as the Power Score (Giles, 2008), is a constructed metric derived for each channel at each stage of a specified decision pathway. Computation of the Power Score includes a report of exposure, influence, valence of influence, and hierarchy of influence at a particular inflection point in the defined communication architecture. Using a combination of qualitative and quantitative insights and measures, a purchase decision model is developed to: describe the desired think, feel and do outcomes intended for an advertising campaign; quantify the decision process elements–the stage relevance, the task importance, and the mindset salience; quantify brand priorities–brand equity by stages and task; and message testing and channel indices (expectation and passion) by stages and by tasks. This decision model is then transformed into a communication architecture (the connection opportunities that exist across influential interactions that are depicted as a dialogue map, a message architecture, and media roles). Using quantitative data from original and syndicated sources, a derived Power Score is constructed to assess the potential of a channel to drive awareness, top of mind, shape an opinion (Giles, 2008).

Finally, a fifth innovative perspective called Serios, relates to a monetary-based message prioritization system, which provides each user a dashboard view of their recognition by co-workers for attention to and responsiveness on highest priority team objectives. Driven by an appreciation for the economics of user attention for the approximately two billion people who use email and the estimate that in 2009 the average corporate email user will spend 41% of the workday managing email messages, Serios enables both the sender and the receiver to learn what is important to each other and to quantify the value of reading and responding (Radicati, 2007). Although developed for the work environment, value clarification in one-to-one relationships and dashboard metrics of those measures warrants consideration as relevant metrics for advertising. Advertisers, as well as corporate communication managers, acknowledge the fluidity of digital media across work time and leisure time, as well as across devices and media. Attention and engagement metrics for corporate communications have potential application for advertising communications–and vice versa.

Advertising practitioners, whether they are clients, account planners or channel developers, view the desired results of advertising according to their objectives. For each, engagement and persuasion are evaluated in the context of business objectives. Innovations in metrics for these evaluations must be influenced by the media used, and it is not unusual for innovative campaigns to include new as well as old. Practitioners want the metrics of their advertising campaigns to evaluate how well the campaign has accomplished intentional changes in the relationships between customers and their products and brands. The conundrum facing practitioners is that a single, established metric is easier to communicate, use, and manage; yet, multiple measures (often new and not fully understood) are needed to accurately reflect the engagement of audiences in today's multimedia advertising campaigns and the extent to which they are persuaded. This represents a new level of complexity for practitioners and for researchers and calls for creativity in developing new metrics that will measure engagement and persuasion across the liquidity of ubiquitous media (Russell, 2009).

ENGAGEMENT AND PERSUASION IN ADVERTISING

The traditional advertising/marketing funnel was based on discrete media exposures to individuals and focused on a pathway of building awareness, generating demand, and building brands. Early constructs were borrowed from mass communication theory to provide a basis for understanding message diffusion and distribution (Schramm & Roberts, 1961). Later, the Hierarchy of Effect model hypothesized that consumers went through a series of steps–awareness, knowledge, preference, conviction and purchase–and that they were receptive at any stage to conversion through demand fulfillment and direct response. The notion that repetitive exposure to messages improved the persuasiveness of the messages was extensively studied and became accepted (Metheringham, 1964; Krugman, 1962).

Broadcast advertising often took advantage of narrative content, with the benefit of engagement and a typically positive mood, on which an advertiser could build engagement with a brand. The notion that emotional involvement with the narrative content in the broadcast increased attention and consequently memory for the ads, was widely accepted (and disputed) by both academicians and practitioners (Doyle, 1994; Du Plessis, 2005). The interrupted narrative practices of broadcast advertising at that time were a good match for this linear model. But, assumptions of linear processing and the power of the narrative in the early narrative model have been challenged by recent trends in consumers' multi-tasking, multi-media use patterns. Attention focused on a single medium has given way to the noise of multi-tasking, escalating the challenge of creating effective engagement in an environment of partial attention (Opir et al.). Reach and frequency metrics, which were appropriate for targeting market segments in the interrupted narrative model of advertising, have been joined by clicks and conversions–metrics that reflect interaction, the choice of self-interruption, and individualized online search behaviors. The concept of earned, rather than assumed, engagement is increasingly part of advertising planning. As the objective of advertising has evolved from capturing a market to building a market, the importance of consideration–and the engagement on which it rests–has become much more important (Konar, 2008).

Today, advertising experience designers study the triggers of consumer engagement and purchase decision processes in order to identify new opportunities for the right message, time and place. One cross-channel consumer-centric approach used by advertising strategists, for example, maps the dynamics of consumer decision cycles across triggers, stages and transitions against the mindset, emotions, decision criteria, and media used by those consumers. In this approach, strategic considerations of which media to use (and how) still requires an understanding of consumer perceptions about the brand, against winners and losers in the category. But strategy also rests on an understanding of consumers' media habits and the role that media play in the context of the decision cycle on engagement and persuasion–whether those are newly encountered media, passively used media or actively sought media.

The concept of engagement is seen differently by media channel professionals, advertisers and academics. Channel professionals want to count the connections consumers have with their media so they can more convincingly say: "Buy my property. Your customers watch it. . .all the time. And they really like it!" (Hayden, 2008). This is a prescriptive objective. Advertisers and their agencies want to understand how to engage consumers in order to gain their attention and influence what they want, love and buy. Many advertising practitioners think of engagement as a multidimensional and holistic concept that is influenced by context. This context includes the many roles the media and engagement play in a consumer's life and the decision making pathway that is called into play for a specific category of goods and services. Creating a campaign requires using this as a prescription.

Academic researchers, on the other hand, generally have a descriptive objective for their studies. They use a variety of constructs and methods to understand engagement and persuasion–some holistic and integrated, some very specific and finely defined. Anthropology, ethnography, psychology, social psychology, education, and sociology–each discipline has constructs, methods and perspectives that are particular to the way engagement and persuasion are viewed. A complete and holistic understanding of a complex phenomenon, such as advertising engagement and persuasion, requires a synthesis of perspectives.

Anthropology, the study of the webs of meaning and significance that guide behavior and actions in our culture, helps provide insights for developing deeper consumer connections by providing an understanding of what's happening beneath the surface. Ethnographic researchers strive to illuminate the meaning that lies behind observed and reported behavior, providing contextual insights that help translate behavior so that its significance is clear to those on the outside (Stinson, 2008). This level of understanding, considered "thick description" (Geertz, 1974), helps practitioners to drive product/brand connections deeper, by mitigating the risks of connecting with consumers on only a shallow level and for only a very brief time.

An ethnographic approach, partially derived from anthropological perspectives on culture and meaning, is based on two fundamental assumptions. The first assumption is that consumer connections are based on symbolic properties attributed to products, services and brands; these properties vary with time, culture, location, and other factors. The second assumption is that these connections are mutable; they're subject to change by either consumers and the brand–or both. The implication of this is that both consumers and producers have power over the meaning given to brands and products; both have the ability to change (Stinson, 2008).

Psychologists have traditionally studied engagement in terms of how people relate to each other, situations and markets. They focus on one or more psychological components of engagement: cognitive (resonance–"get it"–speaks to me), emotional (totally immersed, absorbed, the opposite of indifference), social (interactive, participative and involved), and longevity–a time factor, a commitment to the future, seeing a long term relationship (Niederhoffer, 2008).

The field of psychology has proposed several different ways to think about persuasion. Persuasion, as a companion to engagement, is seen by some as a rational, active thinking process, "to cause someone to believe, convince." Others focus on the role that feelings or emotions play, "to induce, lure, attract, entice" (Oxford, 1996). In advertising, the construct of persuasion has undergone several theoretical shifts over time and across the disciplines of psychology, anthropology, and social psychology. Early explanations were based on main effects (McGuire, 1969)–such as learning theory (Hovland, Janis & Kelly, 1953; Kelman, 1958) or cognitive response theory (Greenwald, 1968). Main effects studies described the influence of persuasion variables (distraction, emotion, source credibility) on increased or decreased persuasion as a single process.

Other psychological theories attempting to explain persuasion have been based on dual process models in which information is processed by either central or peripheral routes: the Elaboration Likelihood Model (Petty & Cacioppo, 1981, 1986); the Hedonic Experiential Model (Holbrook & Hirschman, 1982); the Hierarchical Processing Model (MacInnis & Jawroski, 1989); and the Experiential Processing Model (Meyers-Lee & Malaviya, 1999). The dual process models acknowledge that multiple effects are possible for the same variable, that any one effect could be caused by different processes, and they accept the possibility that any one variable could operate differently in different situations. The dual process models differ in terms of which effects, processes and situations they use to describe those processes and effects.

Psychologists' studies also often focus on the extent to which physiological and neurological changes occur when people are engaged. Using measures of skin conductance and heart rate, their measures reflect the physical dimensions of emotional engagement (Ahn et al., 2009). Research has also shown that different regions of the brain are activated when people believe they are interacting online with real people, as opposed to with a computer-automated application, a finding with significant impact on audience engagement in online media (Chen et al., 2009). These finely-focused perspectives come together with holistic concepts, such synchrony–the matching of behaviors, the adoption of similar behavior rhythms, the manifestation of simultaneous movement and the interrelatedness of individual behaviors in studies that show synchrony (Bernieri, Reznick & Rosenthhal, 1988) and synchronicity (Nass & Moon, 2000) are related to positive affect in interactions, to interpersonal liking and smoothness of interactions, and to linguistic style matching (Niederhoffer & Pennebaker, 2000). In other words, synchrony and synchronicity aid engagement.

Other factors influence engagement as well. Applying foundational research that studied massively multiplayer games to identify critical influences in the juiciest media of its time, Reeves and Read (2009) have identified the ten ingredients for great games, and for creating engaging immersive experiences in both work and leisure environments.

The field of social psychology has also made important contributions to the understanding of persuasion. Some social psychological constructs, such as interpersonal communication (Watzlawick, Bavelas & Jackson, 1967) or the self-validation model (Bailenson et al., 2007; Petty & Brinol, 2008), focus on metacognitive processes to understand how an individual's thoughts about the content, source or process of communication may help to explain attention, relevance, and engagement with media in the human experience. "Focusing on the processes by which variables have their impact is important because it is informative about the immediate and long-term consequences of persuasion" (Petty & Brinol, 2008). Others focus on the environments–ambient as well as stationary–in which people experience environmental, social and media cues (Kaptein et al., 2010.)

Both psychologists and social psychologists have studied the influence of emotions on persuasion and decision making (Zajonc & Marcus, 1982; Mittal, 1994; Shiv & Fedhorikhin, 1999; Damasio, 2004; Bailenson et al., 2008). The notion that emotion increases attention and memory (Biel, 1990; Doyle, 1994; Du Plessis, 2005) has received acceptance by both academicians and practitioners. Nass, however, argues that moods, which last from minutes to hours, should be the focus of such studies, rather than emotions, which last only for seconds. Moods, he argues, are the emotional lenses through which people experience their worlds. Some key persuasive goals that are influenced by mood and may benefit from different mood strategies include trust, memory, persuasion, acquisition, and continued use (Nass, 2008).

Sentiments are anticipated moods, judgments that predict the ways stimuli will induce moods. Sentiments may be conscious or unconscious. The sentiments created by anticipating moods use the mechanism of transference to attach valence and arousal to products that would otherwise not elicit those responses. For example, the anticipation that "If I use this product, I will feel confident" or “This product will makes me feel happy” is based on sentiments rather than on emotion in its physiological definition.

Sentiments, according to Nass, are dominated by two dimensions: the arousal continuum that ranges from calm to excited; and the valence continuum that ranges from negative to positive. Arousal reflects a readiness for action and involves dimensions that are more physical that cognitive. Valence refers to the positive or negative content of the mood. Interesting differences have been noted in the extent to which arousal or valence dominates mood and sentiment in older and younger age cohorts, the younger being dominated by arousal, the other dominated by valence. Media psychologists have noted a secular trend across age groups such that people are becoming more arousal oriented, leading to an arousal culture that embraces constant change and abhors boredom (Nass, 2008).

Psychological theories fall short of a holistic explanation in that they do not acknowledge that people may process both central arguments and peripheral cues. Using constructs from the field of education, Woods and Murphy propose that new insights on how perception–the active part of cognition and the tools and filters through which we absorb our environment–is involved in persuasion (modifying or altering the knowledge of an individual) may require constructs of both philosophy and psychology (Woods and Murphy, 2002). In the field of philosophy, on the other hand, persuasion is framed in terms of rhetoric and often does not acknowledge conceptual change. They propose that constructs of conceptual change may be useful in understanding how organized knowledge structures change. Although Woods and Murphy focus on how people “come to believe” (i.e., are persuaded to new beliefs) in educational settings, these concepts have application in other situations in which conceptual change is the objective.

Sociologists have also embraced the question of audience engagement–using concepts of social channels and epidemiology–to study, for example, audience engagement in YouTube videos. Applying two constructs of epidemiology (a power-law distribution of waiting times between cause and action and an epidemic cascade of actions becoming the cause of future actions), the relaxation response of a social system after endogenous and exogenous bursts of activity was documented by studying the time series of daily views of YouTube videos (Crane & Sornette, 2008). Results showed fast gainers were prompted by particular events as well as by quality of the content.

In sum, current academic approaches to studying and understanding engagement and persuasion include concepts and tools sanctioned by a variety of academic colleagues and their disciplines. Each discipline has its unique perspective. For many the objective of the research has been to expand understanding, to contribute to a pool of knowledge. Some applications of these results to “real advertising” are described in the literature, but in general, these studies by academicians are intended to describe phenomena rather than to inform planning or evaluate campaign results. The constructs and tools used by practitioners for studying engagement and persuasion, on the other hand, while they may include descriptive components, are intended to be prescriptive–to guide decisions.

Just as for practitioners, there is a conundrum for academic researchers in the expectation that new measures can be developed to truly reflect engagement in new media and measure its persuasive impact. While disciplinary deconstruction of engagement and persuasion may facilitate intellectual precision in developing theoretical constructs and making logical explanations more defensible, the complexity of life outside the laboratory relegates the precision of academic measurements to research problems that are less urgent. Additionally, the requirement that academic research make new contributions to the intellectual domain means that academicians often use promising innovations as a stepping stone to the next granular insight, rather than stitching them together and refining an integrated framework.

Both academicians and practitioners are confronted with yet another conundrum for developing metrics that measure engagement and persuasion. There are some factors for which we do not yet have means to measure (yet these factors are believed to be true). There are also factors that can be measured but which are not fully understood. Professional wisdom and seasoned judgment include understanding the individual constructs as well as the metrics that integrated them. An integrated and holistic understanding is essential for the descriptive analysis of engagement and persuasion processes. An integrated and holistic understanding is also essential for the prescriptive analyses that inform strategic decisions in real campaigns. It is the synchrony of these two requirements that makes collaboration between academicians and practitioners vital to the development of metrics in the field of advertising.

RESEARCH COLLABORATION NEEDED AMONG ADVERTISERS, CHANNEL DEVELOPERS AND ACADEMICS

Theorists, analysts, and practitioners are making great strides to close the gap between old metrics and new media by developing new measures for both old and new media. These measurements and the methods by which they are obtained vary across specializations in advertising: product/brand design; out of home advertising; mobile advertising; online advertising; and experiential advertising. Methods and measurements in academic studies vary by discipline. Some measure assumed engagement; others measure earned engagement.

The challenge–and the opportunity–for channel developers, channel managers and media planners of both old and new media today–is to co-evolve new metrics that reflect the new media, the new patterns of media use, the new content, and the new mindset of exposure that will help to justify pricing, based on today's objectives for advertising effectiveness. The requirements for understanding advertising impact have now evolved beyond exposure as the primary indicator, and beyond awareness and recall as advanced levels.

The current cultural context suggests that measuring the return on advertising expenditures must reflect the consumer's relationship with the brand–across media and over time. The initial CPM metrics were created because advertisers wanted to establish a basis for pricing the opportunity to interrupt listeners' and viewers' attention to a narrative. Generally speaking, it quickly became clear to those wanting to advertise that the use of mass media was a relatively inexpensive way to do so. CPM helped justify a larger expenditure for media that had the potential to reach a larger audience in a single task, single medium environment. Measures of effectiveness, defined by metrics, were the basis of the value on which pricing was determined.

Value-defined pricing continues to be relevant today. In an environment of limited resources, media planners use metrics to evaluate the cost and benefit of potential media buys; they want to reduce the risks and increase the returns on their media spend. The desire for new metrics by practitioners necessarily reflects the accountabilities of their professions and their employers. Current cultural shifts in the scope and definition of markets, the durability of brand loyalties and the epidemiology of influence mandate the evolution of CPM toward metrics that capture the interaction between the consumer and the communication, as well as its impact on the consumer's relationship with the product or band.

In a like manner, significant opportunities exist for academic researchers to enrich theory testing, generate new hypotheses and validate new metrics through attention and engagement with real advertising campaigns–contributing to their disciplines with expanded scope. New academic research agendas in engagement and persuasion can be stimulated by the field experiments conducted by advertising planners and practitioners, and many new intellectual frontiers can be identified for advertising research. Engagement and persuasion are multidimensional phenomena that require interdisciplinary approaches to develop a full understanding; and new media are continually evolving.

The influence of emotion, moods and sentiment on happiness, confidence and trust has important academic and practical implications. The meaning of convenience–instant gratification, ease of use, and access–and its relevance to various phases of consumer purchase decision processes has both immediate and long term considerations. It is imperative to understand the relevance and role of community in empowerment, sharing, and leadership for communication and influence. The interplay of background and foreground in simultaneous media usage is foundational to understanding attention, receptivity and messaging in simultaneous media use. Further understanding of these issues may help to create metrics and also to guide their use.

Given the importance of personal context to create the relevance that earns engagement, today's planners must also study authenticity, credibility and relationship trajectories in the brand experience, in decision pathways, and in cultural context. They need earned engagement metrics that are relevant to today's self-interruptive multi-tasking, multi-media consumer-generated media environment.

Measurements of effectiveness are vital to the business propositions of new media, and parsimony is advantageous in developing metrics and standards. Definitions and standards are evolving, but at this time are treated on a situational basis. At this time, it is important to consider all innovations in measuring effectiveness and investigate their potential. But, as mentioned earlier, the choice of measurement must be closely tied to the advertiser's objectives.

Media metrics are used by clients to judge the effectiveness of campaign: sales, overall traffic, earned media, and directional data. Assessment metrics inform the "refresh" of the media and guide product design and development. Metrics are also needed by advertisers and channel developers. Advertisers need metrics to determine priorities, to decide on conflicting arguments and to resolve competing values in organizations and systems. Channel developers need metrics to demonstrate to investors–and to clients–that there is a return on the investment of resources. Decisions often cannot wait for more research. In the absence of proven metrics, experience shows that the void will be filled. Either faulty metrics will be used or best guesses will prevail.

Practitioners' integrative and iterative experiments in the field offer rich opportunities for advertising researchers to test theory, methods and conclusions and describe those in the context of the holism of real life. Collaboration and transparency between academics and practitioners in the development of constructs and strategies can allow more rapid iterations in testing new measurement concepts and methods and can reduce the risks in selecting those to scale for broader use.

SUMMARY AND CONCLUSION

There is a need to develop robust metrics appropriate to measure advertising effectiveness in earned engagement of today's multi-media environments in which consumers interrupt their own multi-tasking as their attention shifts between background and foreground media experiences. Engagement is emotional, intimate, immediate and experiential. Persuasion is complex and includes processes and effects that can operate differently in various situations. Current research and analytics are better at diagnosing than prescribing.

The current state of knowledge and tools are not yet sufficiently developed to provide formulaic guidelines for how to generate engagement and persuasion in new media. Rather, they are better used for analyzing consumers' responses and learning about their relationships to issues, products and brands. Even while they are evolving, new metrics have a strong role to play as thinking, planning tools–to illuminate relative differences to be considered in setting advertising and media strategies.

Advancing the state of metrics for advertising in new media requires collaboration among advertisers, channel developers, channel managers, and academicians. All of these interested parties have a renewed interest in disambiguating engagement, identifying and measuring the active ingredients of persuasion, and understanding how to leverage new media to accomplish their separate but related objectives.

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ENDNOTE

[1] Including a two-day workshop, "Monetizing Engagement in New Media," sponsored by Media X at Stanford University August 2008. This chapter draws upon presentations and discussions in this workshop, in which agency, channel and academic researchers met to collaboratively understand the dynamics of continuous partial engagement in multi-tasking environments, to exchange strategies that leverage relevance across media, and

to share insights on how actionable metrics can monetize the value of engagement in personalized media across mass markets.

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