



CENTER FOR MEDIA DESIGN  
BALL STATE UNIVERSITY

## Engaging the Ad-Supported Media

Middletown Media Studies Whitepaper

# **Engaging the Ad-supported Media**

## **Middletown Media Studies**

### **Observing Consumers and Their Interactions with Media**

**January 2006**

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# Table of Contents

## Engaging the Ad-supported Media

### Middletown Media Studies

#### Observing Consumers and Their Interactions with Media

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Introduction: Elusive Engagement	1
A Media-centered View	1
An Audience- and Context-centered View	2
Middletown Media Studies	3
Context-Centered Elements of Engagement	5
Location	5
Hour of the Day	6
Day of the Week	8
Life Activity	11
Concurrent Media Exposure	14
Episodic Structure	18
Conclusion	20
References	22
Acknowledgements	22

## List of Tables

Table 1.	Distribution of average minutes of media exposure across life activities	12
Table 2.	Distribution of average minutes of media exposure across single-medium and concurrent-media exposure modes	17
Table 3.	Top three CME pair partners by incidence and average minutes	20
Table 4.	Median and average number of media episodes per day and average episode length	20

## List of Figures

Figure 1.	Incidence of media exposure by hour of the day	7
Figure 2.	Average minutes of media exposure per user by hour of the day	7
Figure 3.	Incidence of media exposure by day of week	10
Figure 4.	Average minutes of media exposure per user by day of week	10
Figure 5.	Distribution of average minutes of media exposure across life activities	13
Figure 6.	Distribution of average minutes of media exposure across single-medium and concurrent-media exposure modes	17

# Engaging the Ad-Supported Media

## Elusive Engagement

Engagement, the new grail of media metrics, proves both elusive and difficult to define. Media researchers and analysts have suggested it involves exposure, attention and influence, without exactly being any one of these familiar elements of the consumer's relationship to media. There are two general approaches to defining engagement circulating in the industry press: a **media-centered** view and an **audience- and context-centered** view.

### *A Media-Centered View*

In the media-centered view of engagement the audience is *engaged by* the medium. Either the media channel or the media content can be emphasized; in either case there are presumably systematic and measurable differences among media in their potential to engage audiences in ways useful to content creators and advertisers.

In the channel-based approach, engagement is an attribute of a medium, and as such is an attractive supplement to—or replacement for—frequency as a value multiplier in media planning metrics (Mandese, July 21, 2005). Different media have dissimilar potentials to engage audiences and therefore should be differentially valued by advertisers.

In the content-based approach, engagement is an outcome of content delivered by a medium, not the medium itself, and therefore is primarily the responsibility of content creators. However, different media channels have different content capabilities or associated genres and formats (text vs. audiovisual; passive vs. interactive, short episodic duration vs. long episodic duration, etc.). Engagement can therefore be partially attributed to the medium; presumably the rest is up to content. Even from a content-based view of

media, however, engagement may not be fully attributable to features of specific content. The surrounding content influences engagement as well (Real Media Riffs, Nov. 1, 2005).

*An Audience- and Context-Centered View*

The audience-centered view places engagement in the behavior and experience of the user: the audience *engages* the medium or content. Engagement is minimally defined as the combination of exposure and meaningful attention to a medium or content; alternately, as a process of attention that has impact by influencing user attitudes, choices or behaviors (Pilotta, August 15, 2005). Engagement characterizes the “depth, breadth and scope” of the media experience (Elkin, April 12, 2005). The audience experience is influenced not only by channel and content but also by a host of personal and contextual factors (such as personality, competition for attention from other life activities, and concurrent exposure to other media). Some commentators have expanded beyond this episodic focus on experience to claim that engagement is the audience’s overall relationship with the medium, including media gratification preferences, cumulative time spent, and loyalty (i.e., the Newspaper National Network 2005 engagement study by Millward Brown). Audiences seeking particular experiences develop tendencies to engage selected media to meet those expectations. From this perspective, specific media are able to claim to engage audiences more effectively than other media by virtue of the role they typically occupy in audience members’ lives.

Despite uncertainty around the meaning of engagement and how to measure it, we can approach engagement empirically by addressing its key elements of medium, audience, content and context. The Middletown Media Studies II data provide a unique opportunity to explore similarities and differences in how media differ in elements of audience-centered engagement: **audience** (incidence of media exposure, time spent with

media, audience demographics); **context** (location, hour of the day, day of the week, mode of exposure, life activity, episodic structure and, in the case of concurrent media exposure, primary and secondary attention); and **content** (at the level of genre). This report focuses on contextual elements of engagement for the major ad-supported media (magazines, newspapers, television, radio and web); audience and content issues are addressed in other reports.

### **Middletown Media Studies**

The Middletown Media Studies are a comprehensive attempt to inform our understanding of how consumers interact with all major media and the roles media play in their daily lives. The first Middletown Media Studies (Papper, Holmes, & Popovich, 2004) compared media time budget results for traditional telephone survey, media diary, and observational (shadowing) methods. Middletown Media Studies II (Papper, Holmes, Popovich, & Bloxham, 2005) explored the media time budgets of a much larger sample using an enhanced observational methodology.

Observers for the shadowing component in MMS I utilized paper logs to record observations. For MMS II we developed data-logging software to run on “smart keyboards” (small laptop-like computers running the Palm OS™). Almost 150 observers were recruited in Indianapolis and Muncie and trained in naturalistic research, institutional research board rules and operation of the data-gathering equipment. Operation centers were established in both Muncie and Indianapolis for logistical management of observation sessions.

A targeted, demographically balanced population was recruited by Ball State University Center for Media Design staff and Strategic Marketing and Research, Inc. of Indianapolis. Observer training was conducted in February, March, April and May of 2005.

Observations were conducted in March, April, May and the beginning of June of 2005. A total of 412 observations were arranged for one full day, starting as soon after someone got up in the morning and would allow us in, with a shift change at approximately 3 p.m., and continuing until as close to bedtime as the person would allow us to stay.

Observations were distributed across all days of the week. Of the 412 arranged observations, 394 were completed. A number of observations were discarded as incomplete—some because observers arrived late or left early, an observer became uncomfortable with the situation, the participant declined to allow entry until too late or asked the observer to leave early, or because of equipment failure. In this analysis we use the longest 350 completed observations, providing an average observational day of 12.9 hours and completed data of 12.6 hours.

In general, the sample's demographics are similar to national demographics. Notable exceptions are in ethnicity, where Hispanic and Asian groups are under-represented in terms of national profiles though representative of local demographics, and income, which tends to be somewhat lower than national numbers. The income differences are offset, in part, by low housing costs in the region.

Overall results for daily media time budgets (Papper, Holmes, Popovich, & Bloxham, 2005), concurrent media exposure (Holmes, Papper, Popovich, & Bloxham, 2005), and computer-based media (Papper, Holmes, Popovich & Bloxham, 2006) are available as reports published by the Ball State University Center for Media Design. For a list of current and forthcoming publications, visit [www.bsu.edu/cmd/insightresearch](http://www.bsu.edu/cmd/insightresearch).

## Context-Centered Elements of Engagement

Context-centered elements of engagement include the *where* (home, car, work, other), *when* (time of day, day of week) and *how* (concurrent life activities and concurrent media; episodic structure) of media exposure.

### *Location*

One of the critical strengths of an observational study is that it can be people-based rather than simply media- or location-based. We started observing people in the morning at home, but when they went to work, shopping or visiting friends, our observers went, too. We coded all observations into one of four locations: home, car, work and other. “Other” includes locations such as homes of friends or family, retail and service locations, restaurants, bars, libraries and theatres. Note that media exposure recorded at a work location is not necessarily part of work activity; media exposure resulting from work activity at home is still coded as “home” in this location analysis.

Television dominates in the home by incidence of exposure, radio is the dominant medium in the car, and computer media dominate at work; but after that, the incidence media exposure is more variable.

- In ranking of incidence of magazine exposure, home ranks first (20.1 percent), followed by work (15.8 percent) and other locations (9.3 percent).
- The gap in incidence of media exposure between home and work is wider for newspaper and television than for magazine media.
- Nine out of ten of our participants were exposed to television in the home, and 21 percent were exposed to television at work.
- Radio doesn’t dominate time budgets the way television does, but it comes closer to being omnipresent due to its common use in the car, at work and at home.

- Web exposure is almost all at work and at home. “Other” locations include libraries, churches, and schools and Wi-Fi coffee shops.

The distribution of accumulated time of media exposure across locations is similar:

- Magazines, newspapers and television are predominantly—but not exclusively—home-based media.
- Magazines are the medium with the largest proportion of time of exposure spent in “other” locations, perhaps reflecting the ubiquity of magazines in public places where waiting may be required.
- Work is a key location for time spent with the web and, to a lesser extent, radio.

#### *Hour of the Day*

Media access and exposure changes over the course of the day, both in terms of voluntary media exposure and involuntary exposure (e.g., the unwanted telephone call at an inconvenient time, the media demands of children or work tasks). Typical daytime rhythms are apparent in the ebb and flow of the incidence of media exposure over the course of the day (Figure 1), as is the rhythm of the workday, although only 60 percent of our participants were employed.

- Magazines maintain a low but steady incidence of exposure at approximately 5 percent of participants per hour throughout the day.
- Newspapers have greater incidence of exposure in the morning but then maintain a profile quite similar to magazines for the rest of the day.

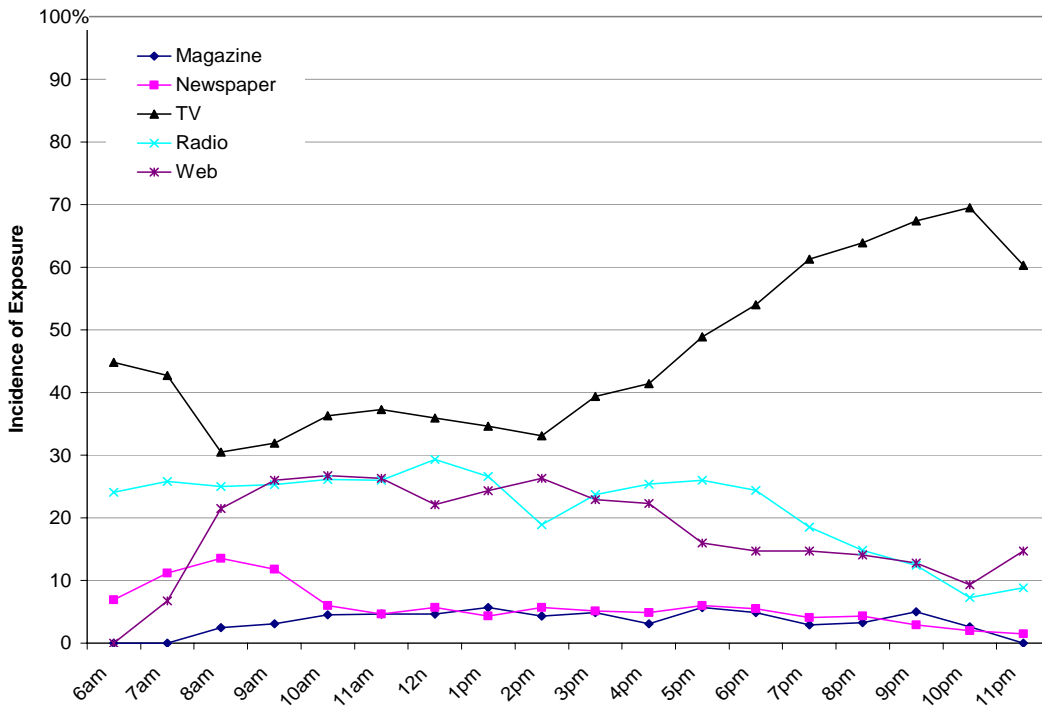


Figure 1. Incidence of media exposure by hour of the day (by percentage of participants observed in each time period).

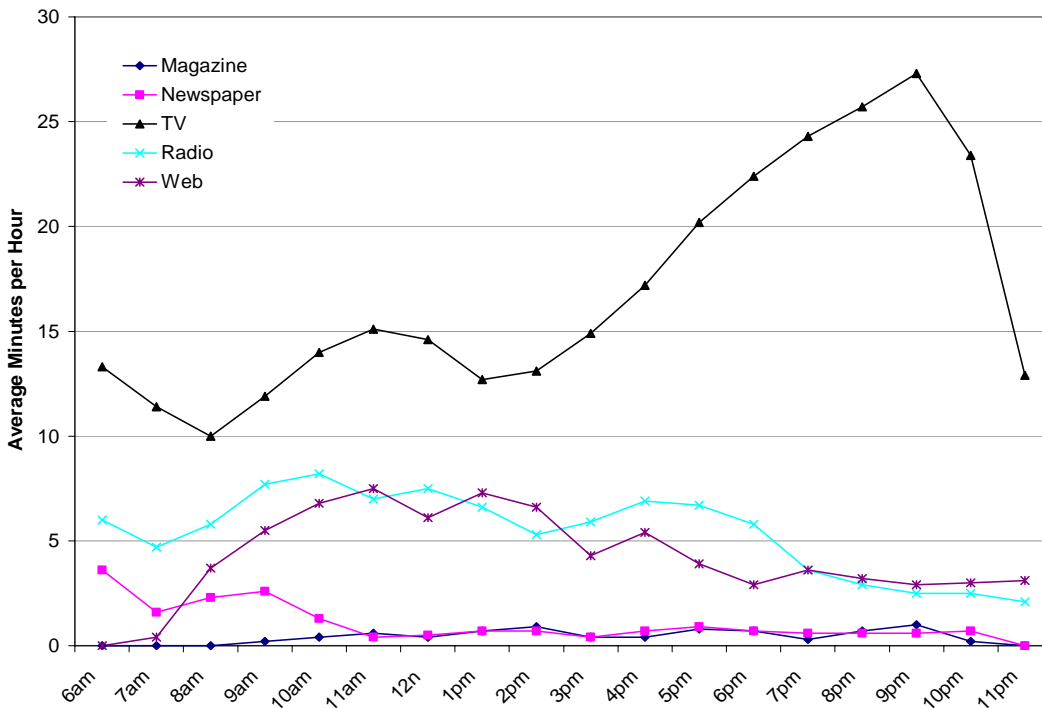


Figure 2. Average minutes of media exposure per user by hour of the day.

- Television's utility as a source for morning news is reflected in high incidence in the early morning. Its incidence falls as that of newspapers increases through the 8:00-9:00 a.m. hour. Television incidence of exposure remains around 35 percent through mid-afternoon, then rises to a high of 70 percent in evening television viewing.
- Radio maintains a relatively steady incidence of exposure through the morning and declines in the evening—an indicator of the importance of workplace exposure.
- The profile of web exposure over the course of the day reflects the typical work day, with higher incidence of exposure in the 9:00 a.m. to 5:00 p.m. time period.

The daily profiles for average minutes of media exposure (Figure 2) closely resemble the patterns for incidence of exposure. The dynamics which increase or decrease the incidence of exposure over time apparently influence the amount of exposure in a similar fashion.

### *Day of the Week*

Middletown Media Studies II observations were distributed across days of the week, including weekends. The association of weekdays with work patterns and weekends with personal, family, religious and recreational activities is deeply rooted in American culture, so it is unsurprising that some of the most apparent patterns are weekday vs. weekend differences in incidence and average minutes of media exposure.

- Magazines are not a weekend medium per se; they have their highest incidence of exposure on Monday (29.1 percent) and Friday (34.7 percent).
- Newspapers peak on Sunday; this is unsurprising given the distinctive role of the Sunday edition. They have steady incidence through the week (around 33 percent)

and their lowest incidence of exposure on Saturday (24 percent). The overall profile is similar to that for magazines except for the Sunday spike in incidence.

- Television is also fairly steady through the week, with its lowest (80 percent!) incidence of exposure on weekends.
- As work-associated media, radio and web have their lowest incidence of exposure on weekends and fairly high incidence throughout the week.

Incidence profiles are similar for magazines and newspapers, and for radio and web, with television the outlier due to its high incidence. The pattern follows for average minutes as well: similar profiles emerge for print media, and for radio and web, with television as the outlier.

- Sunday yields the highest average minutes per magazine reader (39.9) for the week even though incidence of magazine exposure is lower. Tuesday (29.5 minutes) and Thursday (27.2 minutes) take second and third place in the average minutes ranking.
- Newspaper readers spend the most average minutes on Sunday, over 20 minutes more than any other day (56.5 minutes, compared to 34 minutes on Wednesday).
- While incidence of exposure for television is lower on Sunday, those who watch TV watch a lot of it: over 40 minutes more per viewer than for Saturday, and over 2 ½ hours more than Monday and Thursday, the days with the lowest average minutes per viewer.

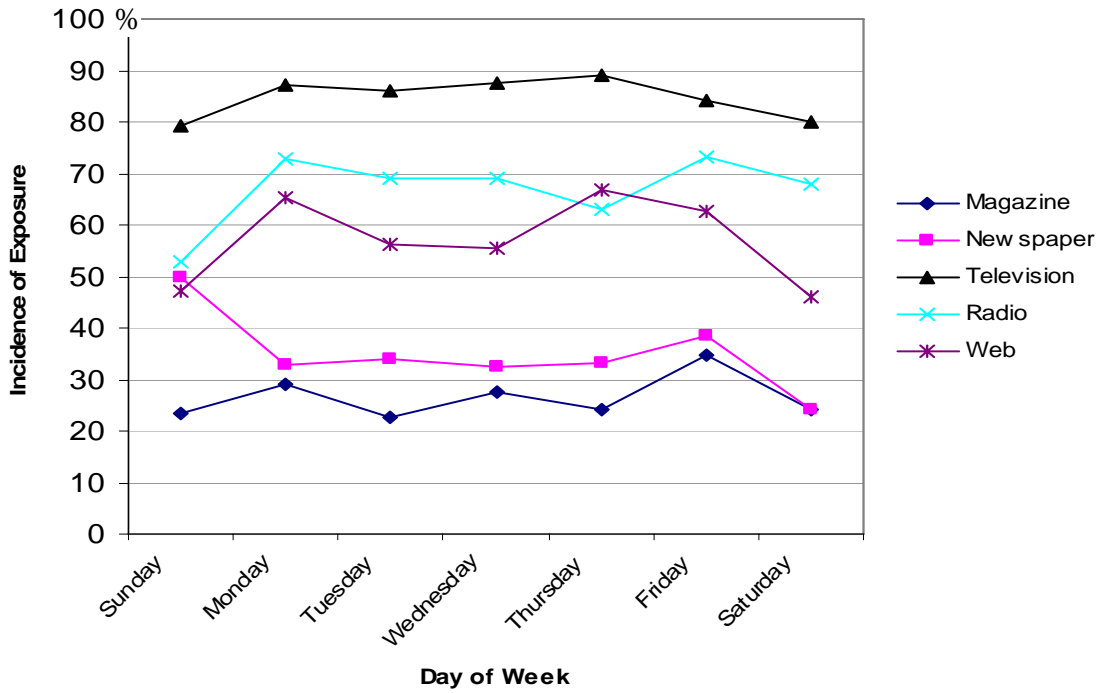


Figure 3. Incidence of media exposure by day of the week.

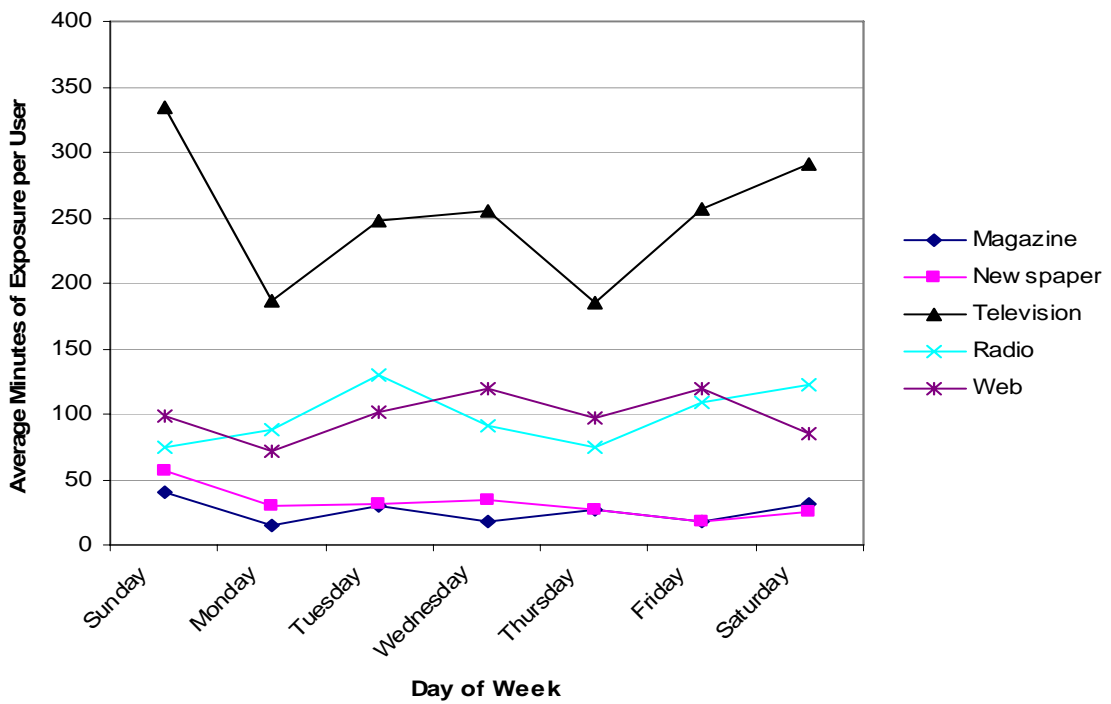


Figure 4. Average minutes of media exposure per user by day of the week.

### *Life Activity*

Despite the overwhelming amount of time we spend with media, being a viewer, listener or user is not yet the only thing we do. Media-related activities are only part of a complex mix of “life activities” making up the waking day. In MMS II we recorded these life activities using a 15-category system adapted from Robinson and Godbey (1997). Table 1 reports the share of each medium’s average minutes of exposure associated with each life activity; Figure 5 displays the distribution of media time across a simplified version of the life activity categories. Note that (a) several categories with very low overall accrued time are collapsed into the “other” category, and (b) “work” in this instance is determined by the activity, not the location.

- Print media fare well in this test of focus of interest, with 60.3 percent of magazine minutes, and 68 percent of newspaper minutes, occurring without competition from non-media life activities. In both cases meal eating is the highest-ranked concurrent activity, as a companion activity for approximately 10 percent of the media’s time.
- Television fares less well, with 53.8 percent of its minutes uncontested by other life activities. Because of the huge amount of television exposure this nevertheless means over two hours of television viewing daily with no other concurrent life activity. Meal preparation (6.8 percent) and housework (6.2 percent) are highly-ranked concurrent activities.
- Radio, perhaps the ultimate “background” medium, generates a low 24.4 percent of its minutes as the sole life activity (excluding driving); more radio exposure (25.6 percent) occurs in conjunction with work activities. Services and shopping (4.6 percent) and housework (4.6 percent) are highly-ranked companion activities.
- The pattern for web is similar to radio, with “media only” (41.4 percent) and web concurrently with work activities (39.5 percent) accounting for most of web time.

Table 1

Distribution of average minutes of media exposure across life activities.

	Magazine		Newspaper		Television		Radio		Web	
	%	minutes	%	minutes	%	minutes	%	minutes	%	minutes
Media only	60.3%	4.4	68.0%	8.3	53.8%	129.6	24.4%	19.5	41.4%	27.9
Work	6.8	0.5	4.9	0.6	6.0	14.5	25.6	20.5	39.5	26.6
Housework	4.1	0.3	3.3	0.4	6.2	14.9	4.6	3.7	2.1	1.4
Personal needs	1.4	0.1	1.6	0.2	3.7	9.0	2.3	1.8	1.5	1.0
Child care	4.1	0.3	1.6	0.2	3.2	7.6	2.9	2.3	2.2	1.5
Services & shopping	4.1	0.3	0.8	0.1	0.7	1.6	4.6	3.7	0.4	0.3
Meal preparation	2.7	0.2	0.8	0.1	4.8	11.5	1.9	1.5	1.0	0.7
Meal eating	9.6	0.7	10.7	1.3	6.8	16.3	3.9	3.1	3.4	2.3
Education	1.4	0.1	0.0	0.0	0.5	1.1	0.3	0.2	2.7	1.8
Religion	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.1	0.1
Organizations	0.0	0.0	0.0	0.0	0.1	0.2	0.6	0.5	0.0	0.0
Events	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1
Social activities	2.7	0.2	3.3	0.4	6.0	14.5	8.0	6.4	2.7	1.8
Exercise	1.4	0.1	0.0	0.0	0.5	1.1	1.0	0.8	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.6	1.4	1.1	0.9	0.0	0.0

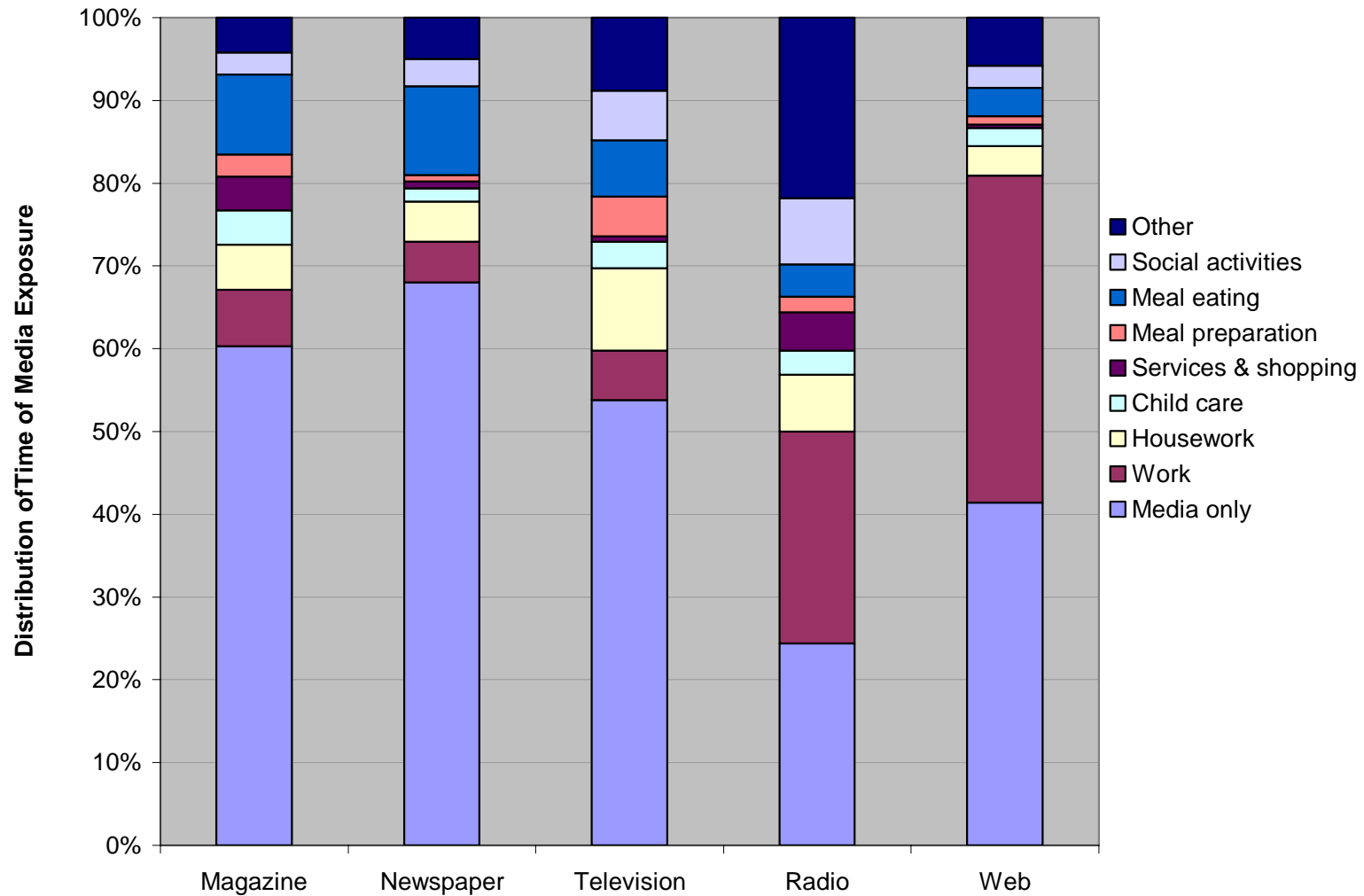


Figure 5. Distribution of average minutes of media exposure across life activities (note: several low-exposure categories reported in Table 1 are merged with the “Other” category in this chart).

- Americans apparently treat media as part of mealtime: meal eating, and to a lesser extent meal preparation, are common companion activities to media.
- For “hands on” media—magazine, newspaper, web—meal eating substantially exceeds meal preparation as a companion activity; the ratio between the two narrows for the “hands off” media of television and radio.

Note that “media only” life activity includes concurrent exposure of two or more media; we will treat such concurrent media exposure next.

### *Concurrent Media Exposure*

We use the phrase “concurrent media exposure” as a carefully-considered alternative to the commonly-used labels of “media multitasking” or “simultaneous media usage.” The former is potentially ambiguous because it is often applied to the combination of media use with other life activities such as watching television while eating; the latter begs the question of what “use” means. Both erroneously imply active engagement. As previously noted, media exposure may range from fully engaged attention (intently watching a new episode of a favorite television show) to incidental exposure to a largely unnoticed medium (the background presence of radio music while shopping in a retail store). “Use” is uncomfortably problematic in the case of simultaneous multiple media use, as the phrase implies task-driven attention to multiple media. Such simultaneous use can range from full engagement in multiple media (an office worker on the telephone, describing to the “help desk” the error messages displayed on a computer screen), to a clear foreground/background relationship (playing a challenging computer game while listening to the stereo), to restless attention-shifting among multiple candidates for attention (a person reading a magazine with the radio providing background music or talk, while occasionally glancing at a muted television to check the progress of a sports event).

We adopt the phrase “concurrent media exposure” (CME) to avoid such ambiguous or potentially misleading characterizations, and define it as *exposure to content from multiple media simultaneously available through shared or shifting attention*. For example, a book on a nearby shelf does not constitute a media exposure. Holding a newspaper in a reading position constitutes an exposure because the content is immediately available. An audible radio broadcast is a media exposure for someone in the room even though we may not know if the radio is subject to conscious attention. Reading a magazine while the radio plays is an instance of CME.

Little is known about motivations for, and influences on, CME. It is unreasonable to assume that CME stems only from conscious choice by the media consumer. The amount and patterns of CME likely result from a combination of factors, including motivations and goals of the media user, involuntary media exposure, frequency and duration of a medium’s use, location and time, consumer traits, and the “fit” between media. CME motivations and gratifications are beyond the scope of this report. Neither did we directly code whether an episode of media use was by choice or involuntary; however, our data allow us to explore CME in relation to overall media time budgets.

We charged our observers with recording the apparent focus of attention when two or more media were in concurrent exposure: a single medium was designated the primary focus of attention and other media in use were designated as secondary. Observers were responsible for tracking apparent attention shifts back and forth between media. We based the coding of primary and secondary attention on observable components of behavior such as body shifts and direction of gaze; subtle and rapid shifts of attention not accompanied by behavioral indicators are beyond the scope of this observational technique. While this, at best, an imperfect appraisal of the distribution of attention, it does

provide empirically-based data richer than data generated by asking respondents to report their general tendencies to use media together.

Table 2 and Figure 6 report the distribution of average minutes of media exposure across exposure modes: single-medium exposure vs. concurrent media exposure (CME); and within CME, the distribution of time spent as medium with primary attention and as medium with secondary attention.

- Print media do not appear to fare well in terms of the percentage of their minutes spent as the only medium in use; both magazines and newspapers have about 70 percent of their time spent concurrently with other media.
- The picture is very different if you consider the combination of the two modes when a medium has the apparent focus: single-medium exposure plus concurrent media exposure in primary-medium mode. In this measure, magazine is the top-ranked medium (84.9 percent of average minutes of exposure); newspapers (71.3 percent) nearly equal the score for television and radio (75 percent).
- When television and radio are not the only medium in play, they are likely to be background media to some other primary media.
- The web fares surprisingly poorly, at only 48.3 percent of its minutes as sole or primary medium. The single-medium figure, however, is low because of concurrent same-screen computer-based media (email, software and instant messaging).

The most common media pairings for our five media of interest, by incidence and average minutes, are reported in Table 3.

- When CME pairs are ranked by incidence of exposure, mobile and land-line telephones tend to emerge as CME partners due to the ubiquity of the telephone call.

Table 2

Distribution of average minutes of media exposure across single-medium and concurrent-media exposure modes.

	Total average minutes	Single exposure minutes	CME minutes	Distribution of time within CME mode	
				Primary medium	Secondary medium
Magazine	7.3	2.1 (28.7%)	5.2 (71.2%)	4.1 (78.8%)	1.1 (21.2%)
Newspaper	12.2	3.7 (30.3%)	8.5 (69.7%)	5.0 (58.8%)	3.5 (41.2%)
Television	240.9	172.2 (71.5%)	68.7 (28.5%)	10.5 (14.6%)	58.2 (84.7%)
Radio	80.0	56.2 (70.2%)	23.8 (29.8%)	4.1 (17.2%)	19.7 (82.8%)
Web	67.3	13.5 (20.1%)	53.8 (79.9%)	19.0 (35.3%)	34.8 (64.7%)

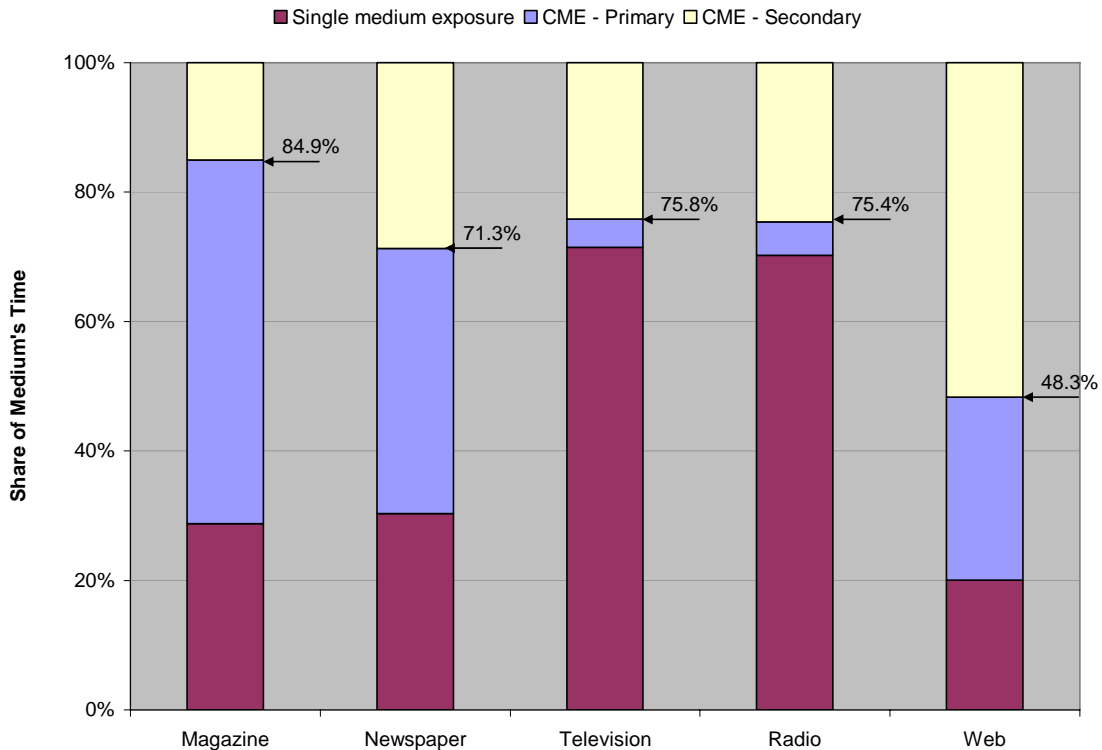


Figure 6. Distribution of average minutes of media exposure across single-medium and concurrent-media exposure modes (the combined percentage of single exposure minutes and minutes as primary medium in CME mode is indicated).

- When CME pairs are ranked by average minutes of exposure, television is inevitably a common partner. Its dominance of the media day ensures a high probability of being a companion medium to other media.
- Almost half of all magazine and newspaper exposure is concurrent with television exposure.
- The VCR may appear to be an odd second-place pair for newspapers, at 13.1 percent of all newspaper time, but this may be an artifact of morning video viewing in which a parent reads a daily newspaper while monitoring a child's viewing of a cartoon video. In other Middletown Media Studies II reports we label this the "Disney™ Involuntary Viewing Effect."
- The web also tends to be paired with "background" media such as television and music in terms of average minutes of CME; however, the telephone also makes the top-three CME pair ranks, perhaps with some help from work-based concurrent use of web and telephones.

### *Episodic Structure*

Media exposures have an episodic structure: they have a beginning, duration and end, and as described earlier, a location in time and space. Table 4 reports the median and average number of episodes for each media and the average length of each episode in minutes.

- Once again the groupings of magazine/newspaper, radio/web, and television in similar patterns are apparent.
- Magazines and newspapers produce lower episode numbers and lower minutes per episode.

Table 3

Top three CME pair partners by incidence and average minutes (all participants).

	Top pairs by incidence		Top pairs by minutes	
	Media pairing	Incidence	Media pairing	Avg. CME minutes
Magazine	Television	15.9%	Television	3.5 (47.9%) <sup>1</sup>
	Radio	4.9	Music	0.7 (9.6)
	Telephone, Music	3.7	Radio	0.5 (6.8)
Newspaper	Television	23.7%	Television	6.3 (51.6%)
	Telephone	8.9	VCR	1.6 (13.1)
	Radio	5.1	Web	1.4 (11.5)
Television	Telephone	50.0%	Web	18.5 (7.7%)
	Mobile phone	25.1	Email	9.8 (4.1)
	Web	24.3	Telephone	9.6 (4.0)
Radio	Mobile phone	20.6%	Software	8.0 (10.0%)
	Telephone	15.4	Email	5.6 (7.0)
	Television	12.0	Television	5.4 (6.8)
Web <sup>2</sup>	Telephone	27.9%	Television	18.5 (27.5%)
	Television	24.3	Music	6.6 (9.8)
	Mobile phone	12.3	Telephone	5.2 (7.7)

<sup>1</sup> The CME pair's share of total exposure to the medium (e.g., concurrent Magazine/Television exposure amounted to nearly 48 percent of all magazine exposure).

<sup>2</sup> Ranking does not include concurrent use of same-screen computer-based media

- Radio and web produce high average numbers of episodes and low-midrange episode lengths.
- Television produces high episode numbers (though not as high as the web, typically an easily-interrupted medium due to user control of content flow).  
Television also produces, by a large margin, the longest average episode length.

Table 4

Median and average number of media episodes per day and average episode length (users only)

	Median episodes per user	Average episodes per user	Average episode length in minutes
Magazine	1	2.1 (n=107)	11.1
Newspaper	1	2.1 (n=137)	14.8
Television	3	3.8 (n=317)	69.6
Radio	3	4.0 (n=256)	27.6
Web	3	4.5 (n=218)	24.2

Magazines and newspapers can be characterized as media used a few times during the day for relatively brief periods. The web and radio involve more frequent and longer lasting episodes, while television produces the longest episodes of exposure. To an extent, the episodic structure of media is influenced by factors such as content, format, purpose, location, and level and ease of consumer control (a magazine article may be set aside for reading to be completed later, whereas a television program would need to be recorded for later viewing).

## Conclusion

Comparison of the major ad-supported media demonstrates the complexity of their contexts of use: magazines, newspapers, television radio and the web vary in their patterns of location of use, time and day of use, concurrent life activities and concurrent media exposure and pairings. Different media dominate in different locations; media exposure ebbs and flows with the progression of the day and of the week, but in different ways for each medium; media compete in different ways with each other and with other life activities. To the extent contextual influences impact motivations for media use,

competition or compatibility with non-media activities, and competition for attention from other media, they must be acknowledged as important pieces of the intricate puzzle of media engagement.

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