MASS OR NICHE MEDIA: WHY NOT BOTH?

There is little doubt that the audience structures of the so-called mass media have become increasingly fragmented since the 1960s, but this does not necessarily mean that advertisers can no longer use TV to attain high reach levels with their ad campaigns. Yet this myth persists and is propagated in an endless stream of articles, white papers, think pieces and speeches touting the new power of "niche" media (including specialized site-based media, online customer tracking and selling options, custom publishing, permission-based advertising, infomercials and many other options). Although the value of such selectively targeted advertising is undeniable, using the "demise" of mass media (they really mean TV) as a rationale for switching to niche is questionable. Both have a role to play in contemporary marketing strategies.

The following statement from an advocate of alternative media is typical of the misuse of audience data to document the downfall of mass media (TV): "In 1965, advertisers could reach 80% of Americans aged 18-49 by running TV commercials only on CBS, NBC and ABC. By 1994 the 'big four' broadcast networks (with Fox) commanded a 52% primetime audience share. By 2006 that share was down to 30%." As with most commentaries along these lines, the assumption is that primetime TV represents all of TV, which is not the case. Worse, it uses the terms "reach" and "share" of viewing interchangeably, which is incorrect.

So what are the facts? To begin with, let's define the term "reach" as virtually every TV advertiser understands it. Reach is the percentage of a target group viewing telecasts that air an ad schedule, across any combination of network types, individual programs and dayparts bought by the advertiser. Under this definition, the typical national advertiser in 1965, who utilized schedules on CBS, NBC and/or ABC in the early mornings, daytime, early news, primetime, late night and/or weekends, had unlimited reach potential. Depending on how much time was purchased and which daypart was utilized, a typical brand's four-week reach was about 65-70%, whereas over extended periods of time it expanded to 85-90% or higher.

Fast forward to 2007, and the situation—at least as it applies to reach—is not so different. Although their average minute ratings are well under half what they were in the 1960s (due to the availability of so many channels for viewers to sample), the major broadcast TV networks (ABC/CBS/NBC) still reach upwards of 90% of all adults in a weekly time frame with their total array of programming fare, and virtually everyone else over longer periods. The main difference between 2007 and 1965 is not *reach*, it's *frequency*. Almost all Americans are reached to some extent by CBS/NBC/ABC programs, but watch them far less often than they used to. Additionally, syndication and cable, which were not options in 1965, also afford significant reach potential. The real issue is not whether one can attain sufficient reach via national TV, but whether viewers are effectively exposed to TV ad campaigns and responsive to them. Here, the niche media proponents are on more solid ground, for it is clear that viewers are considerably less likely to sit and watch commercials than was the case five

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decades ago in the pre-zapping era. This is evident in all of the ad exposure and commercial recall studies and ad recall research conducted over the past three to four decades. Contemporary ad awareness tracking studies report that only 30-40% of an average advertiser's target group recalls seeing its commercials after 400-500 GRPs of national TV weight; under similar circumstances 30 years ago, ad awareness levels were about 60-65%.

So this is where niche media contributes the most. In addition to targeting specific demographics and mindset segments by virtue of their editorial content, location, timing capabilities and interactive functions, niche media are assumed to deliver more ad receptive—and responsive—audiences than the mass media, notably TV. This benefit is, of course, maximized when the advertiser's sales pitch is compatible with the niche media's environment or marketing context, which means that the fullest exploitation of niche media may call for specialized creative approaches rather than the umbrella branding or motivating ads that are employed in many television campaigns.

The basic question is this: if advertisers were to desert mass media (i.e. TV) and opt only for niche media, would their return-on-investment (ROI) really be higher than using the more sensible mass plus niche approach? Niche media offers better targeting and in many cases a superior selling environment, but niche also tends to be pricier than mass, and by definition it captures far smaller audiences. In contrast to the niche-only route, a *mass plus niche* advertiser, while not guaranteed a better result, casts a far wider net, increasing the chances of wooing all prospects, not just the most obvious targets. For many marketers such a dual approach remains the best way to go, with mass media providing the benefits of low CPMs and "critical mass" coverage, while niche media zeroes in on those most inclined to buy, when they are most interested in the product or service.