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Guest Editorial – Marketing in the Era of Long-Tail Media

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The theme of this issue of the *Journal of Advertising Research* is "The Long Tail of Media," a phenomenon that describes incredible media proliferation; for example, there are now hundreds of TV channels and thousands of websites that have attractively sized and targetable audiences. Media fragmentation creates profound challenges for leading media properties, which now typically deliver less than a third of the audiences that they did in the past.

This phenomenon will forever change the practice of buying and selling media. We have collected a series of important articles that describe what marketing, media, and research functions need to consider as they transform.

Stephen Kim's viewpoint provides data that shows people's desire for marketing messages varies by media context so the artful marketer can find ways of integrating their brands into the entertainment experience. Scott McDonald provides facts regarding our highly fragmented media landscape and the implications for media measurement. We must move to hybrid approaches as sampling alone will not provide sufficient granularity of measurement for media properties on the long tail. The article from Mark Loughney, Martin Eichholz, and Michelle Hagger on the ABC long-form episode player online confirms that TV networks are transforming into cross-media platform content providers. Herb Sorensen's article on the in-store communications experience takes on two important issues; the notion of in-store experience as a communications medium and how extreme message proliferation makes us evolve our media measurement concepts beyond impressions to what people actually might see if we are going to effectively compare the efficiency of media across platforms. John Hallward's article describes a possible part of the portfolio of tools needed to measure cross-media effectiveness.

The long tail of media is new and old at the same time. It is simply technology catching up to what people have always wanted. Media technology now allows people to manifest that they have an amazing variety of interests and a desire to indulge these interests across media platforms at their whim. Marketers and media companies better listen up to what consumers are saying. The Advertising Research Foundation (ARF) is at the nexus of this change as member organizations come from all stakeholder groups: marketers, media companies, media and creative agencies, research organizations, academics. We have tried to assemble a powerful package of articles that will bring to life and quantify the brave new marketing world we are hearing about from ARF members, characterized by the following.

CONSUMERS IN CONTROL; THE MARKETER'S MINDSET HAS CHANGED

The ARF hears phrases from our members such as:

- "We don't advertise; everything we do is a dialogue with the consumer."
- "We create contagious conversations."
- "The interrupt and repeat model is dead."
- "The mass media blast comes last. The first thing we do is find passionate affinity groups and then we learn what entertainment, networks, and websites they turn to. We then run events. We use TV but it comes last."
- "You can no longer achieve desired reach from one platform."
- "Given media fragmentation, the only place I can find all of my customers is at retail; shopper marketing will become huge for us in the coming years."

"Media Property Across Platform" becomes a New Organizing Principle

We see media companies moving toward integrated organization structures that emphasize cross-platform selling. In part, this will add value back to support the rising customer relationship management of media whose audiences are eroding.

TV is Becoming Interactive and Targetable

As TV becomes interactive and highly targetable, we are likely to see resurgence in viewer involvement and a significant impact on the

payback to television advertising.

Location, Location, Location

Marketers will continue to be very intrigued by the ability to reach consumers at exactly the right moment. This will make location-based marketing via mobile and shopper marketing rapidly growing options in the marketing mix.

Behavioral Analytics, Blending Research and Marketing, Becomes a Dominant Force

There is a shift from traditional approaches where survey research insights are translated into a media strategy that is often demographically based. We see an opportunity to target messaging in a way that maximizes relevance to a person's lifestyles and interests by using advanced analytics based on viewing habits and internet navigation patterns. The behavioral analytics that lead to directing communications becomes a form of segmentation that provides insights at the same time that it is a targeting engine.

SIX CHALLENGES MARKETERS AND MEDIA COMPANIES FACE

1. Cross-Media Planning

How do I choose a media strategy in a way that will best connect with target consumers and given how they choose to gather information for my type of product or service?

As a media planner, how do I create plans where I only have partial audience measurement information and no cross-platform metrics? How do I assess: reach across screens, commercial (rather than program) viewing, internet website ratings, currently unmeasured media, and go beyond impressions?

2. Measuring ROMI

The pressure to demonstrate return is increasing while the complexity is growing as we compare communication efforts across very different media. How do I know which approach to use?

- How should I set my objectives? Return on what ... should all modeling relate to sales?
- How can I find an affordable way of conducting ROMI analysis so that I can conduct such analyses in a standard fashion, rather than only in select situations?

3. New Marketing Rules for Creating Enduring Customer/Brand Relationships

Marketers are working hard to understand how they can integrate their brands into consumer conversations as a way of deepening relationships with customers. This is creating a whole new set of rules for marketers. The industry is closer to the beginning than the end of the journey in understanding how a marketer can become a welcomed social partner (rather than an intruder).

4. The Power of Retailers and The Rise of Store Brands

Retailers continue to gain power in the trading partner relationship with manufacturers. Store brands continue to gain market share as they approach national brands in terms of the sophistication of their packaging, positioning, and product quality. Some retailers hardly sell any national brands (e.g., Whole Foods, Aldi, Trader Joe's). National manufacturers need to realize the hurdle bar is being raised and reestablish their value proposition.

5. Continuing High Rate of New-Product Failure

We must be honest with ourselves; the documented new-product failure rate in our industry is not getting lower despite decades of using risk reduction tools. Perhaps the marketing options that open up via the long tail of media will help marketers to connect better with what consumers are looking for.

6. Research Relevance

Traditional survey and qualitative research are not the only sources of information and insights about consumers that marketing can turn to. Marketers often seek out competing voices: behavioral analytics teams, consultants, going directly to hybrid research/consulting firms that mine consumer conversations (e.g., online buzz).

Research needs to embrace integration, broadening its scope including behavioral analytics, unprompted customer and social discussions, etc.

People now live their lives in an ecosystem that seamlessly includes media for its entertainment value, information availability, social connection, background company, ability to connect with brands they love, and to buy whatever they want at any time of day or night. It is the consumer's choice when to become curious, when to engage in some form of shopping/information gathering, and it is their prerogative to do so in a totally nonlinear way. They no longer need to become aware first, develop interest, develop intention, and then buy ("AIDA model"); awareness, interest, and desire can all happen simultaneously, and in an interactive medium, so can purchase with a few simple clicks!

The new marketing approach must be to integrate into both the head and tail of the media landscape in a way that makes you a welcomed and contextually relevant companion in people's lives.

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