

THE HARMELIN MEDIA REPORT

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Live from New York, It's Bud Light Golden Wheat by Mallory Budin

Has the DVR finally met its match? Maybe. Has something maneuvered its way around the purpose of a TiVo? Possibly. Have advertisers finally found a way to get the viewing audience back to watching the commercials that they spend millions of dollars each year to produce and place? They hope.

On October 17th, *Saturday Night Live* was, literally, brought to you by Bud Light Golden Wheat.



For the first time in its 35-year history, *Saturday Night Live* was sponsored on the national level by a single advertiser, Anheuser-Busch.

Overall, the sponsorship of *SNL* included five 30-second spots, six 15-second spots, a series of never-before-seen clips from *SNL* backstage, as well as live cut-ins to *SNL* viewing parties. While neither NBC nor Anheuser-Busch announced the cost of the sponsorship, the beer line has an annual marketing budget of \$30 million. According to TNS Media Intelligence, Anheuser-Busch has spent \$2.2 million to advertise on *SNL* this year, about 35% more than 2008.

Advertisers face major problems getting their messages past the clutter and into their viewers' senses. Anheuser-Busch got around this problem by purchasing all the national air time. While there were local ads, Anheuser-Busch successfully cut through most of the clutter to reach the audience watching the show live. The October 17th show, featuring Gerard Butler and Shakira, averaged a 4.8 household rating in metered markets, the highest rating so far this season.

So how did Bud Light Golden Wheat get their message to DVR and TiVo watchers? Anheuser-Busch used generic 30-second and 15-second commercials; however, they strategically placed them during the breaks so that the

(Continued on page 3)

The Jay Leno Show by Maggie Machalowski

Prior to its weeknight 10PM primetime debut in September, the media world was buzzing about the projected ratings for *The Jay Leno Show*. It was expected to debut to good numbers because of all of the promotion it was receiving from NBC, and also the lack of competition in the time slot. In the beginning, the show did not disappoint, pulling a 5.1 rating among adults 18-49. This provided NBC with its best ratings in that timeslot since the *SNL* 'Presidential Bash' last November.

After a month of running with the new format and in the new time slot, the ratings have slipped. About five weeks deep in the new time slot, *Leno* has less than half of the audience that it drew when it first debuted. And compared to the same date and time period in 2008, it has lost about a third of the audience. There are claims that Jay Leno fans need more time to discover the new time slot. But it really is too early to say if taking the show in this new direction was really the best move. It was expected that *Leno's* ratings will fluctuate up and



down, depending on the competition it faces on the other networks, its lead-in, and the guests. What is becoming clear is that some of the affiliates carrying the show are starting to

make a little noise about getting hurt by the low viewership. They feel the low ratings affect viewership of their respective local late newscasts, which is a major source of revenue for these stations.

The network maintains that programming *Leno* five nights a week in the new prime time slot isn't really all about the ratings,

(Continued on page 4)

Finding User Value in the Digital Mosaic

by Greg Ebbecke

If a picture is worth 1,000 words, how much can we really see in 130 characters? Micro-blogging and social networks are not only redefining the rate at which we consume information, but are also resetting the boundaries of how users are identified across all mediums. Actions and activities that were not even measured in the past are now readily quantifiable in real time. While high-profile social media integrations draw the lion's share of media attention, it may be access to the allegedly mundane day-to-day revelations that redefines digital media.

In the search for their fifteen minutes of fame, many digital denizens are rushing headlong into social media with little regard to what exactly they are making public. They are quick to play up the minutia of their posts, but, in aggregate, users may be selling themselves off on the cheap.

Nearly every form of media content is now advertising supported, and as such, the quality of that content can be tied almost directly to the premium charged to advertisers for access. Simply put, the more an advertiser is willing to pay for proximity to content, the more qualified the content (and subsequent audience) is expected to be. Social media, by its very nature, invalidates at least a portion of that argument. Social media users can now be identified regardless of content, and so have in some ways become the content themselves. There is no arguing that finding the right user in the right content still has substantial value, but one no longer needs to be in the right content to reach the right digital audience.

Placement within highly-qualified content still carries a hefty premium, as well it should. Even though the content's value to advertisers is entirely derived from the end users' interests, the users themselves fail to carry a similar premium. For the most part, the monetization of digital audience profiles has yet to happen. Ad networks, exchanges and social media aggregators sell increasingly detailed user profiles for what amounts to a fraction of the cost of

(Continued on page 4)

The 2009 World Series

by Amber Tyson

Although most Philadelphia fans neither knew nor cared, last year's 2008 World Series was one of the lowest rated World Series in TV viewing history. It averaged only 13,635,000 viewers over the five games — with game five stretched over two nights due to weather.

As the 2009 World Series drew near, the media industry was hoping for a repeat of the 1978 World Series, when the New York Yankees took on the Los Angeles Dodgers and drew one of the highest household ratings ever with a 32.8. A rematch would mean the top two media markets in the country would be tuning in to catch the World Series action. Although this wasn't to be, MLB still struck gold by combining the two teams that were responsible for the two most-watched World Series in baseball — the Yankees from that 1978 series and the Phillies, whose 1980 World Series against the Kansas City Royals drew an average of

19 million viewers during its six games.

The stakes were high for both teams as the Yankees attempted to become the first team to win a World Series ring in the first and last year of a



decade. They also had the opportunity to repeat history by opening a new stadium with a World Series title, just like the 1923 Yankees did when the original 'House that Ruth Built' opened in April of that year. The Phillies had the opportunity to be the first team to win back-to-back titles since the Yankees won three in a row in '98, '99 and '00 and the first National League team to do it since the Cincinnati Reds in '75 and '76.

The rivalry heated up quickly and so did the ratings. But TV wasn't the only media affected by the World Series buzz. Newspapers, radio and the internet all felt an impact in the two markets as many new opportunities became available to advertisers. Pre-game, in-game and post-game sponsorships and were well received. On the radio, almost all the stations were discussing the World Series. Whether they were talking about upcoming games, having contests to give away tickets, or discussing recent newspaper or internet articles about the games and players, it was hard not to hear about the World Series almost constantly while listening on the radio.

(Continued on page 3)

According to Nielsen, Alex Rodriguez's online buzz was at a level three times higher than any other World Series player or coach. MLB.com and ESPN.com were heavily trafficked as



was each team's site. Many online editions of newspapers such as USA Today, The Philadelphia Inquirer, The New York Daily News and The Philadelphia Daily News gave

readers the ability to not only read articles online and connect to related articles, but also email the article to friends or post the article to social networking sites such as Facebook or Twitter. Many newspapers' websites also allowed readers to blog and comment about



the articles, creating an interactive dialogue with the papers' audience. Many blog-specific sites as well as YouTube were also abuzz with World Series chatter, all allowing for various advertising opportunities. Additional opportunities and sponsorships were also available for the Victory Parade and coverage.

Although some fans were disappointed by the outcome, there's no doubt that the 2009 World Series managed to capture the attention and dollars of two major east coast markets for over a week in many different media and facets of everyday life.

(Continued from page 1) **Live from New York**

viewer had little choice but to watch the commercial. For instance, if you were watching SNL on your TiVo a few minutes behind the live show and a 15-second commercial ran in the first pod position, it would have been difficult to fast forward through that and stop the TiVo quickly enough to catch the cut-in to "Backstage with Bud Light Golden Wheat." Instead, many viewers simply watched the entire commercial break because it's easier to sit through one 15-second commercial and be able to catch all of unreleased backstage footage.



Anheuser-Busch also used live cut-ins to SNL viewing parties in Chicago, Los Angeles, New York and Philadelphia as a follow-up to a short commercial. The viewing parties hosted by Bud Light Golden Wheat featured locals watching SNL and drinking the new beer. These parties highlighted the prime audience that Anheuser-Busch targets: young adults, drinking and having a good time on a Saturday night. An easy way to get young adults to ditch the fast-forwarding on their DVRs is to have them sit through a 30-second commercial so they can see what their peers are up to, and in this case, hopefully notice what they are drinking.

Anheuser-Busch isn't the first to buy out a program, and they certainly won't be the last. As technology advances, so will the techniques companies use to get past that technology. Advertising is everywhere, from the commercials to the shows themselves. There is no escaping it. So just kick back, relax, and grab an ice cold Bud Light Golden Wheat, a beer with all the drinkability of Bud Light brewed with golden wheat for a refreshing new taste (just seeing if you're still paying attention).

Around the Harmelin Water Cooler

This Month's Question:

The recent World Series lasted for six games—that's 54 innings.

How many innings did you watch or listen to this year?

None	6%
1 - 20 Innings	10%
21 - 30 Innings	4%
31 - 40 Innings	15%
41 - 50 Innings	27%
51 - 53 Innings	8%
54 Innings	30%



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(Continued from page 2) **Digital Mosaic**
their content-based competition.

Part of the disparity is due to the immaturity (read: inaccuracy) of the targeting technologies, while a good deal of the hesitation is centered on the website owners' moral/ethical dilemmas around such widespread repurposing of personal data. In time, the prevalence of smart-phones, which are essentially personally identifiable computers, will only help to refine targeting technologies and make messaging to individual consumer profiles all the more efficient. Additionally, advertisers have long sought to buy the most detailed audience profiles available in other mediums, so this practice is not exactly a new idea. Technology may be enhancing the level of transparency into audience pools, but so long as the aggregate remains anonymous and users are given the option of declaring exactly what information is being shared, then the target profiles being purchased are essentially no different than the readership demographics or broadcast shares the industry has long used for segmentation. Digital profiles just happen to be based less on surveys and inference and more on actual user submission.

With so much information readily disseminated, the onus falls on users, not the system, to decide how valuable this information (and their privacy) ultimately is. By posting and sharing information at will, end users are ultimately commoditizing themselves. Should users push back against content providers and demand more transparency into how their information is used, providers may well be forced to assign a value to that information and set the terms of exchange with the user. If the user does not agree, they are free to take their information elsewhere, negotiate better terms of exchange and theoretically establish a media hierarchy of informational exchange.

If users are empowered to declare their own value, both parties ultimately succeed. Higher premiums mean that the end user sees a lower quantity of more relevant advertisers. Advertisers, meanwhile, will see their messages achieving stronger share of voice, yet still reaching a highly qualified audience. In many ways, it is the same buying system as it always has been, except removed from the contextual anchors that previously defined an audience.

Harmelin Media at the University

Harmelin Media strongly believes in educating the next generation of media professionals. We encourage our staff to offer their knowledge, experience, and expertise to those currently studying media. Harmelin encourages and supports its staff to return to college and teach.

Harmelin Media is proud that we currently have six staff members who have been adjunct professors with both undergraduate and graduate classes at Cabrini College, Temple University and Drexel University. The Harmelin professors have taught courses such as Advertising Media Planning, Interactive Media Planning, Introduction to Advertising, and Audience Measurement.

Furthermore, thirty Harmelin staff members — over one-third of the media staff — have been guest lecturers at various colleges and universities including LaSalle, Temple, Penn State, St. Joseph's, Drexel, Villanova, Cabrini, Widener, Rowan, and the Wharton School of the University of Pennsylvania.



(Continued from page 1) **Jay Leno**

but really about the economics. Their viewpoint is that an hour-long drama is much more expensive to produce than a talk show. Therefore, *Leno* doesn't necessarily need to do as well as a drama would need to do in the same time period in order for the show to be a financial success. And a drama series would only be on the air with original episodes for about 22-24 weeks, whereas *Leno* will be on the air with original episodes about twice as long. It is still unclear, however, whether the financial savings will be enough to save the show.



What is also unclear is what other possible options the affiliates will have if the ratings and viewership for *Leno* do not pick up. The affiliates rely on programming from the networks and the networks in turn rely on the affiliates for generating national advertising dollars. There are many theories floating around on what the network may do if it decides that the 10PM timeslot is not working, including moving *Leno* to yet again another time slot — or even pushing the start time back a half hour or so. Moving the show any later would conflict with the affiliates' late news at 11PM, which would most likely be met with a lot of opposition. The main question in all of this is if the ratings stay consistent, will that be enough for the network, the affiliates and the advertisers?