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# DoubleClick Summer 2002 Cross Media Reach Study

## *Executive Summary*

*In April 2002, DoubleClick surveyed 700 marketers worldwide about their media spending plans and attitudes toward various media vehicles. In this survey, marketers revealed that their greatest barrier to allocating more money to online advertising was the idea that their customer was not online. Using this premise—and standard metrics as the starting point—DoubleClick examined the issue of audience reach across TV, magazines and the Internet with some surprising results. What was uncovered is that the Internet, like TV and magazines, has become a mainstream medium. Both in aggregate and by key target groups, the Internet reaches the mass of consumers and in some cases outdelivers the other media. Is your customer online? The answer is yes.*

### **Bringing the Internet into the Mix**

For the past few years the magazine industry has touted a study conducted by ad agency Foote, Cone & Belding that showed popular magazines to have audiences as large or larger than network TV's biggest draws. The purpose of this analysis is to bring the Internet into the mix. It shows that the most popular sites attract millions of users and a number of them attract audiences that are comparable in size to *Friends* and *People Magazine*.

To make the point about the competitive size of popular web destinations, the 25 most popular websites, prime-time TV shows and consumer magazines have been selected for twelve demo breaks. Their ratings were added to derive the GRPs delivered if each of the 25 were purchased for an advertiser's media schedule. The metrics used, i.e., Nielsen/NetRatings for websites; Nielsen/NTI for network TV; and MRI for consumer magazines, are those used by media planners when they develop media plans.

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It should be noted that the period of time measured to capture the average audience for websites, network TV and consumer magazines differs (average minute for TV; average issue for magazines; specific month for websites). In addition, TV audiences reflect viewing done only at home while magazines can be read anywhere and the Internet reaches consumers in the workplace, as well as at home. The purpose of this analysis is to put the three media, which are mostly considered in isolation from the other, on the same page, allowing for some broad comparisons. And as different as the measurements are, they are the currency used by media decision makers when drawing up media plans for their clients and the exact measures they refer to when discussing audience size.

### Popular Websites Outdeliver TV and are Competitive with Magazines

The following chart compares the GRP delivery of the 25 most visited websites to the most popular broadcast TV shows and consumer magazines.

For ten of the twelve demo breaks that were analyzed, the most popular websites had a decided advantage in GRP delivery over the most popular TV shows. The advantage ranged from +18% to +87%; the Internet is particularly strong at reaching men and high income adults. The only exception was with Blacks 18–49 and Women 18–49/HHI \$75K+, where the GRP totals were roughly comparable.

The relationship between popular websites and magazines varies depending on demo. For instance, they are close for six of the twelve demos, such as Adult 18–49 and Men 18–49. Magazines are clearly stronger with demos such as W18–49, W18–49/HHI \$75K+ and Blacks 18–49 and Teens. For these demos the popular websites lagged by -29% to -57%.

*The most popular websites deliver audiences that are larger than the average episode of the most popular primetime TV shows and are often comparable in size to the most popular consumer magazines.*

GRPs of Top 25 Websites, TV Shows and Magazines

	Websites	Prime TV	Magazines
Adults 18+	217	184	244
Adults 18-34	248	161	273
Adults 18-49	254	172	257
Men 18-49	274	153	258
Women 18-49	244	192	348
Adults 25-54	271	186	259
A18-49/HHI \$75K+	268	187	282
M18-49/HHI \$75K+	303	166	291
W18-49/HHI \$75K+	228	214	978
A25-54/HHI \$75K+	284	211	287
Blacks 18-49	180	174	416
Teens 12-17	213	114	298

Sources: Nielsen/NetRatings; Nielsen; MRI

Note: Total GRPs were arrived at by adding the rating of each of the top 25 vehicles of each medium.

The next chart looks at the relationship between the three media in a different way by showing the average rating of a top 25 vehicle (derived by dividing GRPs from the previous chart by 25). The same relationships pointed out in the chart before apply here as well. For every demo break popular websites have an average rating above that of TV. The greatest advantage for websites is with Teens (8.5 website rating vs. 4.6 for TV shows) and Men 18–49 (11.0 website ratings vs. 6.1 for TV shows). In fact, the average M18–49 rating for the most popular websites is also higher than for the most popular magazines.

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### Average Rating of a Top 25 Vehicle

	Websites	Prime TV	Magazines
Adults 18+	8.7	7.4	9.8
Adults 18-34	9.9	6.4	10.9
Adults 18-49	10.2	6.9	10.3
Men 18-49	11.0	6.1	10.3
Women 18-49	9.8	7.7	13.9
Adults 25-54	10.8	7.4	10.4
A18-49/HHI \$75K+	10.7	7.5	11.3
M18-49/HHI \$75K+	12.1	8.6	11.6
W18-49/HHI \$75K+	9.1	8.4	15.1
A25-54/HHI \$75K+	11.4	8.4	11.5
Blacks 18-49	7.2	7.0	16.6

Sources: Nielsen/NetRatings; Nielsen/NTI; MRI

### From Macro to Micro

When media planners devise media plans their directions to buyers are often expressed as GRPs to be purchased, so they may not be aware of the size of individual vehicles. The following chart provides a representative sample based on A18-49 audiences of popular websites, primetime TV shows and magazines. Seven websites, including *ebay* and *Yahoo! Search* outdeliver *Friends*, while *People Magazine* outdelivers vehicles in either TV or online.

### A18-49 Audiences of Popular Vehicles (in millions)

Websites		Primetime TV		Magazines	
Yahoo! Search	22.8	Friends	14.7	People	26.6
MSN Hotmail	22.7	ER	13.3	Reader's D.	22.8
MSN Search	22.6	Will & Grace	10.9	BH&G	22.5
Google	20.8	Survivor	10.7	TV Guide	20.1
Yahoo! Shopping	18.4	CSI	10.6	National Geo	19.6
ebay	17.6	Raymond	10.1	Sports Illus.	16.2
Yahoo! Geocities	17.2	Law & Order	8.8	Cosmo	14.6
MapQuest	13.5	Mon. Football	8.8	Time	14.6
AOL Search	13.1	West Wing	8.4	Good House.	14.2
MSNBC	10.4	Frasier	8.1	Newsweek	12.6
Weather Channel	10.3	Simpsons	8.0	Family Circle	12.2
Monster	10.1	Fear Factor	7.2	M. Stewart	9.4

Source: Nielsen/NetRatings; Nielsen/NTI; MRI

*The 25 most popular websites among Men 18-49 deliver more GRPs than the 25 favorite TV shows or magazines of this demo group.*

The chart at the end of this report lists the top five rated websites, primetime TV shows and magazines for each of the twelve demographic breaks analyzed. Some of the key observations include:

The most popular website with Adults 25-54, *MSN Search*, has an audience similar in size to the magazine that delivers the largest A25-54 audience, *People*.

*Yahoo! Search* is the most popular website with Men 18-49 in upper income homes. Its 22.0% coverage is comparable to this demo's most widely-read magazine, *Sports Illustrated*. Both vehicles have audiences twice as large as *Monday Night Football*, upscale M18-49's highest-rated primetime TV show.

To put things in more perspective, the highest rating for any of the TV shows for the demos analyzed is 16.3%. By comparison, there are 31 websites among the dozen demos that have higher ratings.

### Conclusion: You Can Reach Your Customer Online

Avoiding comparisons of Internet, TV and magazine audiences because of the differences in how their audiences are measured is unfounded, especially since these measures are already what media decision makers use to inform their decisions. In order for media planners to make the best recommendations, the three media types cannot be analyzed in isolation from one other. Side-by-side comparisons like this one are essential as consumer usage of each evolves.

The purpose of this report is not to denigrate network TV or magazines or to suggest that websites are more appropriate than either of them when evaluating advertising choices. Each has unique characteristics that make them

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valuable for executing particular strategies. For example, it is widely recognized that TV delivers much of its audience immediately while websites deliver reach over a month. Television offers a richness of creative experience not matched by magazine ads or banners. But websites offer unparalleled interactivity and customization. Internet and magazines more actively engage consumers than TV, which is more passive, thus marketers value each vehicle differently. The commonality among them all? Each of their most popular vehicles attract tens of millions of users.

*For many key target audiences, online is an effective reach vehicle.*

The issue of reach across media is a complex one. Reach is not a standard metric and actual reach will not ever be an easy one to derive. But to the basic question of “is my customer online?,” the answer is “yes.” That said, no one media is the right answer for a given campaign. The power comes from the combination of media as it effectively reaches and persuades a consumer to buy.

### **About the Author**

This analysis was prepared for DoubleClick by media research consultant Rob Frydlewicz. As the former media research director of FCB New York, Rob originated the first Top 25 analysis that compared the most popular consumer magazines to primetime TV shows, a study embraced by the magazine industry and the Magazine Publishers of America.

In addition to his tenure at FCB, Frydlewicz also honed his media skills at NW Ayer; Young & Rubicam and Scali, McCabe, Sloves.

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## The Top 5-Rated Websites, Primetime Shows and Magazines

	Websites	Rating	Primetime TV	Rating	Magazines	Rating
Adults 18+	MSN Search	15.8	Friends	10.2	Reader's Digest	21.3
	Yahoo! Search	14.7	C.S.I.	10.0	Better Homes & Gardens	18.5
	MSN Hotmail	14.3	Everybody Loves...	9.6	People	18.2
	Google	14.3	E.R.	9.6	National Geographic	16.0
	Yahoo! Shopping	12.3	Law & Order	8.7	TV Guide	14.5
Adults 18-34	MSN Hotmail	19.2	Friends	12.5	People	21.5
	Yahoo! Search	18.4	E.R.	9.6	TV Guide	16.1
	MSN Search	16.1	Will & Grace	8.9	Cosmopolitan	15.3
	Google	15.6	Just Shoot Me	7.7	Reader's Digest	14.3
	Yahoo! Shopping	14.1	The Simpsons	7.6	Better Homes & Gardens	14.2
Adults 18-49	Yahoo! Search	17.9	Friends	11.6	People	20.9
	MSN Hotmail	17.8	E.R.	10.4	Reader's Digest	17.9
	MSN Search	17.7	Will & Grace	8.6	Better Homes & Gardens	17.7
	Google	16.3	Survivor: Africa	8.4	TV Guide	15.8
	ebay	13.8	C.S.I.	8.4	National Geographic	15.4
Men 18-49	Yahoo! Search	18.9	Mon. Night Football	9.5	Sports Illustrated	19.6
	Google	17.9	Friends	8.8	National Geographic	17.5
	MSN Search	17.6	The Simpsons	7.8	Reader's Digest	15.1
	MSN Hotmail	17.5	E.R.	7.6	People	15.0
	ebay	15.9	Survivor: Africa	7.6	TV Guide	14.0
Women 18-49	MSN Hotmail	18.4	Friends	14.3	Better Homes & Gardens	26.7
	MSN Search	18.1	E.R.	13.2	People	26.6
	Yahoo! Search	17.1	Will & Grace	10.6	Reader's Digest	20.6
	Google	14.9	C.S.I.	9.7	Good Housekeeping	19.1
	Yahoo! Shopping	13.9	Just Shoot Me	9.3	Cosmopolitan	18.6
Adults 25-54	MSN Search	20.0	Friends	11.6	People	20.0
	Yahoo! Search	18.5	E.R.	11.2	Reader's Digest	19.9
	Google	17.8	C.S.I.	10.1	Better Homes & Gardens	19.9
	MSN Hotmail	17.2	Everybody Loves..	9.3	National Geographic	16.2
	Yahoo! Shopping	15.9	Survivor: Africa	9.2	TV Guide	14.8
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	Google	18.7	E.R.	11.8	Better Homes & Gardens	19.8
	MSN Search	17.6	West Wing	10.6	Reader's Digest	18.3
	MSN Hotmail	15.3	Will & Grace	10.5	National Geographic	18.0
	Yahoo! Shopping	14.9	Survivor: Africa	9.2	Time	15.4
M18-49/HHI \$75K+	Yahoo! Search	22.0	Mon. Night Football	10.4	Sports Illustrated	21.6
	Google	21.7	Friends	10.2	National Geographic	20.3
	MSN Search	19.0	West Wing	9.5	People	19.1
	Ebay	17.6	E.R.	8.8	Time	17.2
	Yahoo! Shopping	16.8	Survivor: Africa	8.4	Reader's Digest	17.1
W18-49/HHI \$75K+	Yahoo! Search	16.4	Friends	16.3	People	33.2
	MSN Search	16.2	E.R.	14.8	Better Homes & Gardens	30.3
	Google	15.7	Will & Grace	12.9	Good Housekeeping	21.5
	MSN Hotmail	14.7	West Wing	11.8	Cosmopolitan	19.8
	Yahoo! Shopping	12.8	Just Shoot Me	11.0	Reader's Digest	19.6
A25-54/HHI \$75K+	Google	20.1	Friends	13.3	People	24.5
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	Yahoo! Search	19.2	E.R.	12.8	Reader's Digest	20.3
	Yahoo! Shopping	16.3	Law & Order	11.0	National Geographic	19.4
	ebay	14.8	Will & Grace	11.0	Time	16.1
Blacks 18-49	MSN Hotmail	13.5	Bernie Mac Show	13.9	Ebony	44.0
	MSN Search	13.4	The Parkers	12.0	Jet	37.8
	Yahoo! Search	12.8	Girlfriends	11.6	Essence	34.5
	AOL Search	11.8	One On One	11.2	TV Guide	22.6
	Yahoo! Mail	9.8	The Hughleys	9.1	Vibe	21.1
Teens 12-17	MSN Hotmail	19.2	Malcolm In Middle	7.7	Teen People	26.3
	Yahoo! Search	18.4	The Simpsons	7.2	Seventeen	25.2
	Google	15.8	Bernie Mac Show	6.0	Teen	22.1
	Yahoo! Geocities	15.3	Friends	5.9	TV Guide	17.0
	Yahoo! Mail	12.4	7th Heaven	5.6	National Geographic	15.9

Sources: Nielsen/NetRatings, May 2002; Nielsen/NTI, October 2001–February 2002; MRI, Fall 2001

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