

The Future of TV Commercials: Not as Bleak as Proclaimed

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ABSTRACT Changes in the TV industry and usage patterns create the necessity to reevaluate the production and insertion of commercials into the program. We analyze how industry professionals value the effectiveness of traditional TV commercials and examine if increasingly hybrid advertising formats integrating the commercial message into the editorial content are chosen. Contrary to the common assumption that the classical TV commercial is about to disappear, our structured interviews reveal that it is still considered the most important advertising format and cannot be substituted. The future is seen in integrated intra- and inter-medial campaigns using both traditional and hybrid advertising formats.

KEY WORDS: Advertising, product placement, sponsoring, integrated communication, television

Recent years brought far-reaching changes to the TV industry: developments like digitization, individualization, personalization and an increasing orientation towards events and their dramatization altered the arrangements how program content is produced and distributed (Caves, 2005; Wirtz & Schwarz, 2001). Therefore the way commercials are produced and inserted into the program also is in need of adjustment. This paper deals with the question whether the 30second commercial is still viewed as an effective tool in commercial communication or whether it needs to be replaced by hybrid advertising formats such as product placements or program sponsoring as it is suggested by several industry

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pundits (Cappo, 2003, pp. 168-170; Ries & Ries, 2004, pp. 81-86; Zyman & Brott, 2002). Using expert interviews with industry professionals we can show that from their perspective the commercial is not rendered obsolete but will rather be used in a more integrated conception of TV advertising in the future. The paper is structured as follows: First we will depict the challenges that question the efficiency of traditional 30second commercials, namely audience fragmentation, technical means of advertising avoidance and emerging hybridization of advertising and editorial content. We then present the results of a study on experts' views of the future value of different advertising formats. The discussion section focuses on different levels of integrated communication as a presumable alternative to the substitution of the traditional commercial.

CHALLENGES FOR THE TV INDUSTRY

Ever since television broadcasts have been interrupted by commercials a fraction of the audience is trying to avoid being exposed to this kind of marketing communication, as TV advertising is often considered more annoying and intrusive than print advertising among the audience (Speck & Elliott, 1997). As early as 1985 zapping was described as a threat that could render the commercial obsolete (Kaplan). In the traditional TV setting the audience can avoid commercials by employing cognitive (ignoring), behavioral (leaving the room), or mechanical strategies (switching channels). Moriarty and Everett (1994) observed a sharp increase in avoidance strategies during commercial breaks with muting increasing by 700 percent and other avoidance strategies such as ignoring or leaving the room increasing by 400 percent. Abernethy (1990) estimated that behavioral avoidance would reduce advertising exposure by more than twenty percent. Other studies showed that viewers avoided commercials by zapping about ten (Danaher, 1995) to twenty (Hofsümmer & Müller, 1999; van Meurs, 1998) percent of the time. Ever since these studies were conducted the TV industry has been facing changes that might have an effect on advertising avoidance (Pérez-Latre, 2007, pp. 43-44). The channel line up available to the recipients has been notably extended, but also besides television new media offerings have been established. With the DVR a new technical means of advertising avoidance emerged. Moreover, new TV advertising formats have been developed and established. In the following sections we will discuss these three aspects in more detail.

Fragmentation

The ability to deliver a critical mass of viewers in order to finance the costly program production with high-priced advertising was for decades the exclusive and highly successful domain of broadcast networks (Mermigas, 2002). With an ever increasing number of television channels available since the 1980's consumer choices multiplied. Consequently the

number of viewers tuning into a given program began to erode. Audiences became smaller, more fragmented and more sharply defined by individual interests and attitudes (Kaatz, 1986).

With the number of competing TV channels on the rise, avoiding commercials became more widespread because the individual recipient could always switch to a channel where the program is not currently interrupted by a commercial break (Speck & Elliott, 1997, p. 72). Still fragmentation also had a positive effect from an advertiser's perspective: the individual channel features a program line up that caters to a smaller but more homogeneous and more involved target audience. Assuming a match between a brand's target group and a channel's audience this allows the advertiser to considerably reduce the money wasted on reaching audience members outside of the designated target group. However reaching the whole population became only possible by combining bookings on numerous channels, since in a diversifying society there is no single mass market anymore. Advertising principals need to combine a number of smaller target groups in order to secure a bigger market share or eventually look for alternatives to the traditional 30second commercial. "McDonald's now devotes a third of its U.S. marketing budget to television, compared with two-thirds five years ago. Money that used to go for 30-second network spots now pays for closed-circuit sports programming piped into Hispanic bars and for ads in *Upscale*, a custom-published magazine distributed to black barber shops" (Bianco, 2004). But although the audience figures of each television broadcaster might be dwindling, television as a whole is still the most important way to communicate commercial messages. 2004 TV in the US accounted for roughly 25 percent of the overall advertising volume or 44 percent of the media advertising volume (Coen, 2005). Fragmentation does not directly challenge the commercial itself as even in a fragmented but highly targeted TV landscape a commercial can be very effective. However if fragmentation reaches a certain level the question arises whether it is still financially feasible for an advertising principal to assign an advertising agency with the creation of costly commercials.

Digital Video Recorders

The emergence of the digital video recorder (DVR) in the late 1990's has aggravated the issue of advertising avoidance among the audience. Beyond the hitherto existing cognitive and behavioral avoidance strategies mechanical avoidance strategies could now be automated. The DVR promotes time shifted viewing and equips the recipient with an easy to handle skip functionality. Control over the program schedule shifts from the TV channel as the content provider to the viewer. Numerous studies by DVR manufacturers as well as rating companies (for example Ephron, 2004; Mandese, 2004; Neff, 2004) suggest that DVR users watch TV predominantly time shifted and make heavy use of the ad skipping functionality.

Combining the consequences of fragmentation and automated advertising avoidance Wirtz and Schwarz (2001) envisioned a personalized '*one TV*' where the DVR empowers the individual recipient. Viewers able to opt for any content at any time while automatically avoiding to be exposed to commercials render the big broadcasters inefficient and ultimately obsolete. Television would be transformed from a mass medium indirectly financed through advertising revenues to an individualized medium directly financed by the audience. Thus the DVR would not only bring an end to funding by advertising but also render the notion of a mass audience obsolete.

Despite the common concern about the effects of the DVR on the advertising business there are also voices warning of an over-reaction. David Poltrack, chief research officer at CBS, observes an obsession of industry professionals concerning the idea of the empowered recipient (Ahrens, 2006). Likewise von Rimscha (2006) provides two reasons why the envisioned '*one TV*' structure of the TV market place is rather unlikely. Since in this setting television cannot be financed indirectly through advertising and eventually consumer spending but would need to be financed directly by the audience. Using the example of the German market he can show that the abolition of advertising as a source of funding would lead to a financing gap of roughly a third of the overall television market volume that would need to be compensated. It is highly unlikely that the recipients would be willing to step up their personal media budget on that scale. On the other hand advertisers also benefit from the indirect TV financing since it provides an easy access to a mass audience still offered mainly by traditional TV. Advertisers would not want to give up this most effective gateway to their potential customers especially since a large number of consumer products are not tailored for a small specific target audience. Thus von Rimscha (2006, p. 119) concludes that TV will remain a mass medium that is financed through advertising, however the way the commercial message is included in the program would need to be adapted. In part commercials could be substituted by product placements that can neither be zapped with the remote control nor be zipped with the DVR. At the same time the DVR's potential for audience tracking can be used to form the basis for new targeted advertising formats. Advertising could be customized and thereby somehow preserve the mass audience (Ahrens, 2006). Ad versioning enables the advertisers to tailor their messages according to the interest profile of an individual viewer (Spangler, Mordechai, & May, 2003). Conceivable formats might be interactive commercials that use the interaction to adapt the commercial message according to the viewers' inputs, or longer commercials that reflect the viewers' interests and therefore might be considered as informative rather than persuasive (O'Neill & Barrett, 2004, p. 10). These commercials are actually not replacing those in traditional broadcasting but are pushed to the recipients' hard drives to be opted-in when desired.

New Advertising Formats

New advertising formats are focused on an improved affinity to the target group. Settings and situations that formerly have been ad-free become commercial space in the advertisers concern to prevent ad avoiding behavior and reactance. Eventually this leads to hybrid formats where the commercial message is integrated into the editorial content to generate the maximum amount of attention (Siegert, 2005).

Table 1 shows the prototypic distinction between advertising and PR as two measures of corporate communication. Hybrid advertising formats somehow try to combine the advantages of both strategies. Product placements for instance are aimed at a target group and try to persuade the potential customer, just like any advertising measure. However they also share some characteristics of PR as they are integrated into the editorial context, have a less immediate impact and ideally obtain media access because they seem to naturally fit into the program.

Table 1: Prototypic Distinction between Advertising and Public Relations

	Advertising	Public Relations
objective	sales promotion	relationship management
addressee	target group	reference group
communication model	persuasion one-way communication	interaction quasi two-way communication
media access	paid media access	media access based on news worthiness
content	labeled as advertising	integrated in the editorial context
time horizon	short and medium term	medium and long term
organizational framework	marketing department	communication department

Source: following Siegert & Brecheis (2005, p. 44)

Starting from a different perspective Solomon and Englis (1994) investigated the hybridization of commercial communication and mass media vehicles of popular culture and found that the blurring of boundaries would empower the advertising industry and provide marketers with powerful tools for influencing the consumers. Thus Ries and Ries (2004) argue that in future brand communication needs to concentrate on PR rather than advertising. However new hybrid advertising formats also bring along new risks for the advertisers since the commercial communication is more difficult to control when it becomes a part of popular culture. Substituting 30second commercials by means of product integration might lead to another problem. A non-representative study by Advertising Age (Atkinson, 2003) showed that 75 percent of US consumers had the impression that advertising intruding into the editorial content recently increased. At the same time the consumers rate these new advertising formats as distracting (62%) and too pervasive (72%). Despite the skepticism expressed by the recipients,

marketers and agency representatives seem to be looking for new advertising formats that are closer aligned with the editorial content. Bob Kuperman, CEO of the ad agency DDB was quoted "Interruptive advertising won't play as great a role in a brand's overall marketing communication, especially when one considers the cheaper methods for reaching consumer." (Ebenkamp, 2001). And according to a joint study by the Association of National Advertisers and Forrester Research (Association of National Advertisers ANA, 2006b) among 133 national advertisers 78 percent of advertisers feel that traditional television advertising has become less effective in recent years. Advertisers would seek for alternatives and thus would plan to shift their budgets towards branded entertainment, program sponsoring, interactive advertising during TV shows, online video ads and product placement. O'Neill and Barrett (2004) conducted a series of expert interviews with industry professionals to investigate whether the DVR is triggering new advertising formats. They identified two basic strategies propagated as a way to address the challenges to the traditional commercial, namely product placements and program sponsoring. In the following we will discuss the characteristics of these advertising formats:

Product placements show some characteristics that seem to make them superior to the commercial: Since they are part of the very editorial content no audience member will mute it as this would mean missing part of the show: "Most interviewees agreed that product placement is on the rise in general to combat commercial avoidance" (O'Neill & Barrett, 2004, p. 21) At the same time it could be regarded as less obtrusive since the commercial message is no interruption. A product placement is said to have a far reach both geographically and temporally, especially when a brand is placed in fictional entertainment that can be exported as well as rerun. But even in a singular nonrecurring show product placements can generate higher levels of audience reach since the rating of the product placement is just as high as the rating of the show because there is no slump as measured during commercial breaks. In the US where most channels follow a rather strict 30 minutes schedule Siddarth and Chattopadhyay (1998, p. 134) could show that zapping probabilities for commercials aired around the hour and half-hour were significantly higher than for those aired during the program. Thus for the marketer it pays off to get his commercial message closer to the program rather than place it separately during the break between two shows. Often product placements benefit from an implied character or celebrity endorsement. Of course advertisers have traditionally used the benefit of attaching products to highly popular characters or shows. However, there is skepticism whether the popular image can actually be transferred to a commercial that resides separated in the following break. When a brand is used or at least placed within a show itself, there is more evidence that it will receive additional recognition due to this attachment (Russell, 1998, pp. 358-359). The message can no longer be separated from the

content and marketers assume that the positive image of the person using the branded product will rub off on the product (O'Neill & Barrett, 2004). Finally product placements have retained an image of being relatively low cost, since the common preconceptions prevail that it would be sufficient to send some product samples to the prop master of a production. However, according to the professionals interviewed by O'Neill and Barrett (2004) the concept of product placement would have to be extended to full brand integration, where the marketer and the ad agency actually create the whole concept and content. Therefore the big advertising networks would all have to establish or acquire subsidies in the production sector.

Program sponsoring constitutes a basic way of integration by simply attaching a brand's name to a particular program. Depending on the legal framework¹ program sponsoring can also be expanded into the actual program. The sponsor's brand and the show should be in line in order to create a natural platform from which the show's sponsor could promote his products. However, sponsoring is considered less attractive than placements being relatively expensive and risky (O'Neill & Barrett, 2004). It might suffer from similar problems the commercial faces when solely placed outside the program, so in the future sponsoring might become more interwoven with the editorial content.

METHOD

If the notion of the inferior quality of the commercial holds true we expect industry representatives to share this view. At the same time they would need to be searching for alternatives that compensate for the weaknesses. Hybrid advertising formats should be praised and characterized as possible substitutes. Therefore our research questions are:

- RQ1: How do industry professionals evaluate the efficiency and effectiveness of different TV advertising formats?
- RQ2: How do changing market conditions affect the perceived value of different advertising formats?
- RQ3: To what extent can hybrid advertising formats like product placements or program sponsoring substitute the TV commercial from the industry professionals' viewpoint?

Structured Interviews

We carried out a series of structured interviews with twenty senior executives in the advertising industry. The interviewees are on the one

¹ Several European countries ban sponsors from being a show's promotionally effective topic or else being visible in the show.

hand experts of their own values and conducts (Mayring, 2002, p. 49) on the other hand they are representatives of their respective actors in the advertising process. Thus our informants are not interviewed as external evaluators but as part of the relevant arena (cf. Gläser & Laudel, 2004, p. 9). The interview guidelines guarantee for matchable answers on the same issues while allowing enough openness to include and trigger answers that are not anticipated. Moreover a less standardized approach allows tackling controversial issues and gathering answers that are not socially desirable by the means of paraphrase (Trinczek, 2005).²

The survey period was from January to March 2005. The interviews were part of a larger research project which had a wider objective concerning changes in TV advertising (Siegert et al., 2007), but this paper only presents an extract of the findings. Accordingly the findings relate only to the set of questions where the interviewees shall assess the performance of different advertising formats and reflect on their decision making. Additionally we analyzed the responses to the question on the dynamics of the collaboration between the actors and answers on the general assessment of the future of advertising concerning the potential of hybrid advertising formats as a substitution. In our sample we incorporated representatives from all major actors involved in the traditional advertising process: four companies that act as advertising principals, three advertising agencies, two media agencies, four media sales companies and finally seven broadcasters, commercial as well as public service.³ The composition of the sample means an overweight of the broadcasters compared to the advertising principals, thus the statements of the broadcasters as a whole might be more comprehensive than those of the principals. Research was carried out in Switzerland but since the fragmentation of the audience, the DVR and new advertising formats are universal challenges, the findings can be considered to be meaningful in other markets as well. However in terms of general market conditions two facts should be mentioned: one enhancing the generalizability, the other putting it into question. In the time period when the interviews were carried out, the legal setting in Switzerland allowed product placements similar to the regulation discussed for the revision of the European 'Television without Frontiers' directive. Therefore the protagonists based their answers on a legal reality that will become the norm throughout Europe. However, in terms of the

² The method of structured interviews allows reflections on the judgments of the interviewed persons. With a careful selection of the informants, the statements can be generalised to a certain extent and the findings can be understood as well-founded trends. Structured interviews thereby constitute an appropriate and established methodological approach to examine changes in the advertising industry (Gustafsson, 2006).

³ The findings that will be presented must be understood from the perspective and interests of the questioned industry professionals. The traditional actors in the advertising market are accustomed to routinely create and handle the TV commercial, thus a bias towards this advertising format might be possible. Furthermore no agencies or professionals specializing in hybrid advertising formats were interviewed.

economic framework Switzerland differs from other TV markets. Commercial broadcasters exist only on a regional level since the national market is dominated by the public service broadcaster and by broadcasters that transmit their program from the neighboring countries. Overall TV in Switzerland is a rather weak advertising medium which accounts for only about 10% of the advertising volume. Thus the respondents in Switzerland might be even more skeptical towards the TV commercial and might be accustomed to advertising formats in other media.

Anonymity has been guaranteed to the interviewees in order to allow for overt answers, since some experts were concerned about competitors gaining insight into confidential strategies. Thus we indicate the individual experts with a two digit code only. The first digit provides the respective industry actor; the second digit is the running number.

Table 2: Mapping of the Interviewed Experts

Code	Actor
11 12 13 14	Advertising principal
21 22 23	Advertising agency
31 32	Media agency
41 42 43 44	Media sales company
51 52 53	Public service broadcaster
54 55 56 57	Commercial broadcaster

FINDINGS

Thesis: Hybrid advertising is very valuable and thus a threat to the TV commercial

The experts believe that the volume (21, 31, 32, 52, 53, 54, 56 & 57) as well as the different formats (11 & 13) of TV advertising will increase in the future making hybrid advertising formats a normality (21).

From the perspective of the advertising principal 11 program sponsoring can be categorized in two dimensions, which can be described as ‘relation to the editorial content’ and ‘integration in the editorial content’. The interviewed experts regard the form of program sponsoring the most appealing and desirable where the product or service has a clear relationship with the editorial content and is displayed in an integrated fashion. While expert 12 believes the communicational objective of program sponsoring lies in image transfer, the advertising principal 13 regards sponsoring as a form of support for a particular public sphere. Therefore the communicational objective is seen predominantly in the public visibility of the commitment. This is also the reason why the advertising principal 13 has no problems with the legal restrictions that are placed on program sponsoring.

“You just have to accept them. If you engage in sponsoring you want to appear as the sponsor and do not necessarily have the desire to additionally transport an advertising message. Here you have different objectives”.

The advertising clock⁴ as a special form of sponsoring is seen as the possibility to evade the prohibition of sponsoring for news. As for much of the sponsored programs the primary goal in this case is not a link to the editorial content but broad audiences reach. Because of the brevity of the advertising clock this form of sponsoring is even more restricted than others (13). The experts from the broadcasters also see the main communicational objective of program sponsoring as an image transfer (51, 52, 53, 56 & 57). Sponsoring activities which only seek to use the broad audience reach of the sponsored program are implemented mainly to increase the presence and awareness of the brand, product or service (54 & 52). Nevertheless the representatives of the broadcasters (51, 52 & 56) believe that the close alignment with the editorial content increases the visibility, attention and credibility of the advertising principal. Sponsoring also means more time and effort for the broadcasters (55 & 56) compared to the traditional TV commercial but faces an increasing demand from the various clients because of its close link to the editorial content. Sponsoring is especially attractive for advertising principals which have products that cannot be easily explained in a TV commercial (54).

Also concerning product placement the experts distinguish between two main forms: the integration of brand products in the background (props placement) or the planned integration of brand products in the plot of the editorial content (creative placement). In the first form the brand merely appears and in return the broadcaster receives money or props as a trade-off. In the second form where product placement is a planned integration in the plot the experts see a greater potential of emotionalization compared to the traditional TV commercial. Well-known and popular actors using the product increase the credibility and generate a higher involvement of the recipients, resulting in a better long-term customer loyalty (11). Thereby a clear difference between small local stations and large broadcasters can be noticed. The media sales companies in charge of the smaller broadcasters concentrate on props placements, studio decorations and give-aways for studio guests. The larger broadcasters on the other hand try to integrate the brands in a creative way. For the public broadcasters it is important that every brand appearing in the program either has a news value or is indicated as sponsoring. Expert 51 believes that an offensive handling of product placements is a form of protection against the demands of the advertising principals. This means that the broadcaster identifies appropriate

⁴ The advertising clock is a countdown starting several seconds before the evening news.

editorial content and adequate scenes in advance, looking for dramaturgical settings which allow a meaningful integration of the product rather than making the product itself the origin of the editorial content. Props placements and creative placements also differ in their financing contribution for the media sales company and broadcaster. The first form can reduce production costs as well as costs for the acquisition of content (52), whereas the second form can be marketed and sold as an advertising opportunity (55). The following statement exemplifies the influence which advertising principals as a “*key-partner*” (44) can have on particular editorial content:

“It is easily possible to design an entire TV studio in the look and feel of the corporate identity of the advertising principal [...]. These measures are creative elements that can be implemented for clients that buy their own program” (44).

During the interview the expert tries to play down his comments by saying that no client can actually “*buy*” program but the statement mentioned above definitely shows openness towards the advertising principal. In addition many placements can easily be hidden within the boundaries of loose legal frameworks:

“If you’re doing something on the road it’s easily possible to include the vehicle supplier in the camera shot. These are common practices in order to make it semi legal” (44).

In general the reactions of the different actors suggest that actually the supply side of the advertising market is more interested in integrated advertising than the demand side.⁵

Concerning production costs product placements are seen as very cost effective and low-priced because only the placed product needs to be provided (53). Also in the field of services placements are usually implemented for free: a hotel appearing in the program therefore does not pay a monetary fee but provides the accommodation for the whole production crew. As with sponsoring, a long-term partnership between a specific program and an advertising principal results in higher upfront costs. But because of the repeating presence in form of product placements this advertising format in the bottom line remains cheaper than a conventional TV commercial (55). Especially feature films and sport are seen as very attractive environments to place products. Expert 57 even sees every program or content except news appropriate. His colleague 54 emphasizes the importance of thematic vicinity: travel paraphernalia can easily be placed in travel shows, and kitchen utensils or restaurants are destined for culinary shows. The possibility of

⁵ For a detailed discussion of the potential beneficiaries of integrated advertising and their respective interest in the proliferation of such formats see von Rimscha & Rademacher (2008)

implementing product placements must therefore already be included in the conception of the program. Broadcaster 57 believes that product placement allows a more elegant and less intrusive way of communication than the traditional TV commercial. And his colleague 52 regards product placement as an enhancement of sponsoring with the goal to increase the vicinity to a specific program.

Counter thesis: The commercial is highly valued and cannot be substituted by hybrid advertising formats

Despite all the perceived advantages of hybrid advertising formats, in the opinion of the experts the traditional commercial is still a much valued advertising format that is often praised accordingly:

“The commercial offers you unlimited options. You can do anything. [...] I think it is the most interesting communication format. You can actually take full advantage of your creativity” (43).

This corresponds to the situation in the US where only few observers think that product placement and the accompanying trend towards sole sponsorship of network programs will substantially oust advertising as prime source of revenue. Or as Erwin Ephron is quoted: “They’re interesting, but small potatoes.” (Bianco, 2004).

Especially when the advertising objective is sales promotion our interviewees signify the commercial as the advertising format of choice. However the individual actors each refer to different benefits of the commercial.

Advertising principals value the diverse possible fields of application and the possibilities to control the advertising measures. In general the decision by the advertising principals which advertising format to use is determined by the relevant communication objective. If more than one advertising format seems applicable the decision is based on cost effectiveness measured by objective performance characteristics. The value of a commercial can be measured with an established and transparent framework of audience ratings whereas the actual reach of a hybrid advertising format often cannot be verified precisely. Therefore the commercial is by far the most important advertising format for the principals, accounting for up to 95 percent of their media budget. With the support of media agencies it became feasible to address commercials towards a specific target group (12). A major advantage of the commercial is attributed to the perceived autonomy of the communication (13) and the rather tight control over the actual message transmitted. The principal can “*tell his story*” and thereby emotionally address the recipient or consumer (12 & 14).

Thus the forecast Pérez-Latre (2007) whereby advertising principals could adjust to changing market conditions simply by following the audience migration is not sufficient as it disregards their desire to

control the commercial message. Commercials are termed especially suitable when advertising a mass market product with a broad target audience (11 & 14). Expert 11 describes the commercial also as the format of choice, when it comes to product introductions, as commercials are a good way to raise the brand awareness.

Advertising agencies consider the commercial as the most ambitious and creative advertising format. This assessment may also be attributed to the fact that a prototypic advertising agency is streamlined for the characteristics of a commercial when it comes to organizational structures and compensation habits. The agencies are used to routinely create commercials whereas other formats are at best considered as an appendix to their core business. A diffusion of hybrid advertising formats would thus mean the loss of the central role the advertising agency occupies in the advertising process of TV commercials. Being on the creative edge of the business the agencies point out the importance of the idea as the basis of any commercial. The commercial is even termed a creative narrative. The commercial is characterized as the agencies' core competence (21), main business, "*advertising format No. 1*" (22), and most preferred advertising format (23). Expert 22 describes his self-conception as follows: "*We're the ones that turn 30 seconds of void into 30 seconds of advertising*". Expert 23 describes the commercial as an "*extreme short film depicting and staging the advantages of a product or service*". Expert 22 describes the commercial as a possibility to communicate information and emotions about a product in a versatile way that would not be possible using a hybrid advertising format.

The business model of media agencies is based on bundling the demand for advertising space. Being a standardized booking and accounting unit the commercial perfectly fits into this scheme. Accordingly commercials account for the biggest share in the administered budget of a media agency. Commercials stand out for their straightforward handling: due to a standardized duration and measurement of the audience reach not much can go wrong if the right editorial context is selected (31).

The media sales companies also rank the commercial as their most preferred advertising format and most important source of revenue. A favorable relation between expenses and earnings render the commercial their "*cash cow*" (43). In comparison with other formats the commercial produces the lowest handling cost since the commercial is delivered ready to air and no further production effort is needed (41). On top of potential production costs the pricing of hybrid advertising formats in contrast needs to be calculated from scratch each time (44). Buying of advertising time and slots does not have to be planned well in advance; moreover commercials can be inserted into breaks at a short notice and with easy adjusting. Therefore media sales company 43 depicts the commercial as combination of high effectiveness and attractiveness: the ideal medium to address a broad audience (42).

Broadcasters 51, 53, 56 & 57 highlight the commercial's character as a sales promotion tool. However, a commercial can also be used to run an image campaign (57). In general there are more advertising possibilities during commercial breaks than there are for program sponsoring. Whereas there can be ten different brands in a commercial break, the number of brands acting as a show's sponsor is tightly limited (53). Also broadcasters value the easy handling of the commercial:

"With the commercial our sales company books a slot, the advertising agency provides the tape and we send out the invoice. It's that easy!" (55).

Overall our findings show that the industry is not willing to give up the commercial but would rather improve it, in order to maintain its advantages. This approach resembles the reactions on the challenges posed by the video recorder and the remote control: the traditional reflex of advertising professionals confronted with a new technology is to call for better, meaning more creative commercials. Banks (1987) noticed that advertisers began creating more interesting commercials and placing them in targeted media compatible with the advertising buys. The same reaction can be observed among our experts as well as in US trading papers, where industry representatives routinely express their trust in the power of creativity. "Nothing can rival it [the TV ad] in terms of effectiveness. No banner ad, no embedded content, no sports sponsorship, no product placement can deliver as compelling or persuasive a selling message as a well-crafted 30-second TV ad." (Haley, 2006, p. 26).

Likewise Goodby (2003) believes that the DVR is not a threat for commercials in general, but only for dull and annoying commercials. He supposes that there will be a shakeout where only tune-in commercials involving the viewer will prevail. A precondition of this involvement is some sort of incentive that could either be information or probably even better entertainment in a persuasive setting (O'Neill & Barrett, 2004, p. 10). The lines between advertising and editorial content are blurring faster, as advertising is not only infiltrating the editorial content but is turning into entertaining content itself. From the perspective of industry professionals the solution to the challenge put forward by fragmentation, technical means of advertising avoidance and new formats is clearly a call to integration.

DISCUSSION

Considering the presented results, there are good reasons for the growing popularity of hybrid advertising as well as for the continuation of the TV commercial's success. Both traditional TV commercial and hybrid advertising formats are perceived as attractive and appropriate to match

industry professionals' respective needs. Which advertising formats finally prevail in a given context depends on various factors, for example on the positioning of the media or the advertising company, the demographics of the target audience, or the nature of the product itself. As one expert puts it:

“Our products of every day life are not suited very well for an advertising format like product placement, as they are not really ‘sexy’ products” (12).

Concerning the future development of TV advertising, our interviews and further literature review lead us to the assumption that there are two directions to be further examined: intra- and inter-medial integration. The following sections will deal with these possibilities in depth.

Intra-Medial Integration: Integrating Formats

Advertising principals increasingly structure their campaigns using the various different advertising possibilities on television. Within these campaigns the traditional TV commercial remains the most important component and hybrid advertising formats are seen more as accompanying measures (11, 13 & 21). From the advertising principals perspective TV commercials should not be seen as singular measures but as the main component creating consistent brand communication together with hybrid advertising formats. Hybrid advertising formats are used in a complimentary fashion if they have potential to reach desired advertising goals which are hard to meet using only traditional TV commercials (14). TV commercials for instance can be the necessary requirement within an integrated advertising concept to ensure that a product placement is effective: They can be used to point out the placement engagement of a company and therefore enhance the overall advertising effect (22). Or, as Marshal and Ayer (1998, p. 16) have written: “Product placement is but one piece of a carefully crafted marketing plan.” According to Lefton (2001) the reality show Survivor was a prime example for the integration of different advertising formats: “Every advertiser that buys airtime in the top-rated show’s commercial breaks also gets prime placement in the program.” Just like product placement also sponsoring is seen by the experts as a format which can rarely be used in a singular approach because the brand’s value needs to be communicated with TV commercials in advance (41). Program sponsoring therefore is only seen as promising and potentially successful for brands that are already established because a certain level of publicity is the prerequisite for creating a positive connection between brand and editorial content as well as improving the recognition of the logo.

From the perspective of the broadcasters integrating commercials and hybrid formats is described as a financial necessity. The additional hybrid formats are used to compensate for factual, potential or assumed losses in the context of advertising with commercials. Broadcasters 52, 55 and 57 point out the relevance of program sponsoring as a means of funding TV production. When it comes to in-house productions the guideline is:

“A show will only be realized, when it is funded, that is sponsored, otherwise it won’t make it into the program” (55).

To uphold TV’s appeal as an advertising platform the broadcasters and their media sales companies believe that sponsoring engagements should consist not only of billboards before and after a program but should be closely interwoven with the editorial content, which would also imply ample use of product placements already during the content production. Contrary to the assumption of Gustafsson (2006, p. 26) stating that the “advertisers are longing for integrated or embedded advertising” our results indicate that it’s rather the broadcasters and their media sales companies who are pushing the development of new advertising formats, thus creating a supply where they assume a potential demand (Siegert et al., 2007, pp. 67-77). Or, as Pérez-Latre (2007, p. 47) puts it: “The best television brands are conscious of the classic commercial’s crisis and look for fresh opportunities in media contents using product placement and sponsoring.”

Due to the fact that hybrid advertising formats are still relatively new means of advertising it is legitimate to assume that both industry and scientific research are still in the process of fully understanding their nature. The past years therefore show a significant increase in research analyzing hybrid advertising formats (e.g. Balasubramanian, 1994; more recent Laukemann, 2002, pp. 1-49; Siegert & Brecheis, 2005, pp. 234-253; Woelke, 2004, pp. 26-56). One prominent field of research deals with the various psychological processes involved with product placements, addresses consumers’ attitudes and perceptions, measures the effectiveness and audience recall, or aims to improve product placement techniques (for an overview see Bhatnagar, Aksoy, & Malkoc, 2004; Gupta & Lord, 1998; La Ferle & Edwards, 2006; McCarty, 2004). It can be expected that a diffusion of these academic results into industry practices might lead to a more sophisticated use of product placement as a hybrid advertising format. However, most hybrid advertising formats like product placement are still not compatible with current industry processes which are optimized to handle traditional TV commercials. Therefore the advertising industry is still trying to establish a common currency in order to determine the value and pricing of a placement in comparison to the traditional TV commercial (for an overview of competing methods see Schiller, 2004). Such a currency would be

necessary to potentially establish hybrid advertising formats in a similar fashion as the traditional TV commercial is today.

Intra-Medial Integration: Turning Advertising into Program

As a further possibility of integrated advertising campaigns the experts depict a change of the traditional TV commercial. They expect increasingly longer TV commercials either to deliver more entertaining stories (14) or that they actually become a form of television shopping show (12). Therefore advertising virtually becomes the actual program (Donaton, 2004, pp. 95-118). This strategy is mainly emphasized by the advertising agencies that are concerned about losing their relevance when it comes to program integrated advertising. Expert 23 demands that advertising should be good enough that the viewers would want to see it voluntarily. *“I have the feeling that creativity is the solution”* expert 22 says and adds that with enough creative effort TV commercials will remain relevant for the viewer. A third advertising agency believes that also new concepts need to be developed. According to expert 21 advertising must take on the character of editorial content. As an example he mentions the campaign of a Swiss telecommunication provider that uses extended long-form commercials resembling the style of a sitcom. Also broadcaster 55 would rather not continue to interrupt the program with advertising but more so regard advertising as editorial content. In the future he would clearly like to devise longer TV commercials and give them the qualities and traits of an infomercial and therefore characteristics that associate them closer with the editorial content. According to this expert continuous advertising program is increasingly demanded by the clients. The characteristics of long-form advertising formats resemble those of PR. It seems as if the commercial communication shall not be blatantly persuasive, but either convince in a longer, more argumentative approach or be effective as part of an entertaining experience.

Broadcaster 56 offers advertorials as a form of continuous advertising program and underscores their vicinity to editorial content and their characteristics of regular program. On a regular basis “short commercial documentations”⁶ with duration between one and 15 minutes are broadcasted instead of an advertising brake. This form of advertising is seen as very popular among the clients because it allows them to closer connect the advertising message to the editorial content than it would be possible with a conventional TV commercial. Advertorials are regarded as the only advertising format where the local commercial broadcasters have a competitive advantage over the public service broadcasters because their low costs allow them to fulfill the desires of their clients to a much higher degree. Moreover, local broadcasters benefit from a

⁶ The actual Swiss word is *“Publireportage”* which is a combination of the words commercial and report.

comparatively lower expectation of the local audience concerning the quality of the program and a higher perceived relevance of local advertising. For national broadcasters it is more difficult to include short commercial documentations, as the audience has higher expectations in production and entertainment values. However, already today the advertising principal 14, who is marketing a national brand, is booking commercials of about two minutes length with entertainment characteristics that only at the end refer directly to a product. The aim of these advertising formats is that the audience misconceives them as editorial content which according to experience often is actually the case (43). Since Swiss media regulation requires that all advertisements exceeding one minute must continuously display an overlay stating “continuous advertising program” or “infomercial” expert 44 thinks that continuous advertising programs are “*rendered less attractive by law*”: through the imposed overlay it is harder to benefit from viewers mistaking it as editorial content.

Inter-Medial Integration

The experts see a further possibility for integrated advertising campaigns in the combination of several advertising formats across various media. In these campaigns television commercials have a primary role but other advertising formats and communicational measures besides TV also have an important role. The actors involved in the advertising process agree that product placement should never be implemented solely but should be used in combination with other advertising measures also in other media to generate a maximum effect. This assessment is also empirically backed: Chang and Thorson (2004) experimentally analyzed the potential synergies between television and web advertising and could show that the combination of the two media leads to higher attention, higher perceived message credibility and a greater number of total and positive thoughts. They suggest that marketers should apply a “multiple-source” (=cross media) strategy when trying to improve the brand awareness and recall. Our findings also support those of Karrh, McKee and Pardun (2003, p. 146), who found that placement practitioners regard “combining placement with back-end promotions, sweepstakes, or other marketing strategies” would help to increase the impact and the value of a placement. Also regarding sponsoring the advertising principals interviewed rather engage in commitments that extend the advertising beyond television than just to combine sponsoring with editorial content. This point of view can also be found in the broadcasters’ perspective: for example expert 51 not only views program sponsoring as an expansion into the editorial content but also across one medium:

“Today program sponsoring goes much further, a commitment is extended into an event, [...] the TV sponsors are part of the event, they

are present on the [various] levels of communication, outdoor etcetera, you organize raffles, contest together with the sponsors. TV sponsoring increasingly keeps getting more and more connected, multimedia-based, going from online, to mobile and interactive and because we're enabling the viewer to participate we generate viewer loyalty. The traditional TV sponsoring therefore has evolved“.

Nevertheless the experts also mention the possibility that TV advertising could generally lose relevance. According to various experts it is conceivable that a shift of advertising budgets towards other media like print, cinema and especially the internet could occur (12, 14, 22 & 32). Particularly the latter medium offers clear cost advantages when using longer advertising measures. It's not surprising that only advertising principals and their agencies mentioned this possibility. Media sales companies and broadcasters depend on being financed by advertising (let alone the actual format), and thus have no interest to lose media spending in comparison to other media. Therefore the issue arises if advertising principals will question traditional television advertising as the dominating form of marketing in the future.

The distinction between advertising and PR has been called into question by changes of TV advertising, both past and coming changes. Crain (2002, p. 15) regards PR in a comparatively favorable position when he claims: "Product placements, events and community marketing will be used more and more to create a warm and fuzzy feeling. But PR will be seen as the 'closer' medium that turns a budding relationship with consumers into a lasting and ever-romantic union." In contrast our research suggests a convergence of the underlying communication models of advertising and PR. With the emergence of new advertising formats communication objectives of PR (see table 1) are prevalent in advertising, too. The time horizons cannot be clearly distinguished and both communication models use paid access as well as access enabled by the orientation on events and news worthiness among the different media. Just like PR advertising becomes integrated in the editorial content. The remaining selective characteristics to distinguish advertising and PR will be aspects of feedback and dialog. Crisis communication and the manufacturing of consent remain genuine objectives of PR. Stakeholders cannot be equated with consumer target groups. The localization of advertising and PR within the management grid is debated upon, however it becomes evident that a clear separation is not possible. The sphere of reciprocal influence between advertising and PR seems to grow larger, however a truly integrated marketing communication (IMC) is not realized yet. A survey among 85 major US advertisers (Association of National Advertisers ANA, 2006a) revealed that only 33 percent of the respondents claim to be content with their efforts towards IMC with organizational issues being the biggest challenge. As long as these issues have not been addressed satisfactorily integrated campaigns are more likely to be realized on a small scale

rendering advertising the most valuable contribution to a company's marketing communication.

CONCLUSION

To sum it up, industry professionals agree on the commercial as the most important TV advertising format especially due to a beneficiary relation between expenses and earnings. The commercial is the format of choice when it comes to sales promotion and accordingly realizes the highest revenue shares on each level of the advertising process among all advertising formats. However, all actors in the advertising system expect a considerable growth of the TV advertising market volume and attribute this growth predominantly to an increased use of hybrid advertising formats. At the same time all actors agree that hybrid advertising formats will not and cannot substitute the traditional commercial, since different communication objectives each require different advertising formats.

According to the experts the future is in campaigns that integrate different media and advertising formats. Our results suggest two likely forms of integration each assigning the TV commercial a different importance. Regardless whether integration of campaigns will be rather intra- or inter-medial, our research leads us to the conclusion that TV commercials will remain the backbone of a marketer's communication with the public, although they probably will be combined with hybrid advertising formats more often. It would thus be a severe mistake to look at the commercials as an outdated advertising format in future analyses of TV advertising.

However, the question arises what the impact of the growing popularity of hybrid advertising formats could be from the perspective of the broadcasters. It seems to be possible that the TV commercial could eventually lose its position as cash-cow which it has held for many years, and could just become one advertising format among others. As a consequence, broadcasters would have to show the willingness to leave the well-established routines of the commercial and acquire the relevant know-how for hybrid advertising. This know-how actually concerns two different aspects, namely the marketing and the integration of hybrid advertising formats. The aspect of marketing addresses the ability of the broadcasters and their media sales companies to sell bundles of different advertising formats in order to realize integrated advertising campaigns as discussed in this paper. The aspect of integration addresses the question on which level hybrid advertising formats are going to be inserted into the editorial content, that is rather on the production level (e.g. product placement) or as hitherto rather on the packaging level, and thereby which actor is going to determine the integration.

Finally, many broadcasters, especially public service broadcasters with societal mandate and public funding, are bound to define how much

they are willing to open themselves towards hybrid advertising. It is a major task for them to answer the question, to what extent they want to blend editorial content and advertising, what consequences the use of hybrid advertising formats could have on their credibility, and whether they are using hybrid advertising formats in a legal way.

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