How Channels Compete in the Modern Media Environment

Cómo compiten los canales en el entorno mediático contemporáneo

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ABSTRACT: Robust patterns of buyer behaviour have been observed across such a wide array of conditions that they have been deemed marketing laws, describing how brands compete and grow (Sharp, 2010).
In this study, we demonstrate that these same laws hold for rival media brands - that is, there are systematic patterns that describe how media channels share and compete for audiences. This knowledge has important implications for advertisers seeking to make effective media decisions when placing their advertising, as well as for media platforms or channels if they wish to grow. There are also a small number of exceptions to these patterns, which are identified and their implications discussed.
Data like that commonly used by practitioners to determine the audience reached by their campaigns is used to demonstrate the patterns across diverse media types (TV, social media, radio, OOH, etc). The data allow for the demonstration of the laws both across types of media and within a medium (e.g., Instagram, X, Facebook, LinkedIn, etc., in social media). Sample data from Finland is also incorporated to demonstrate the generalisation of the findings across a different market.
In an increasingly complex global media market, it is important for advertisers to understand what they can reasonably expect from media to ensure their investments are effective. For media providers, it is vital to understand how to grow their brands.

Keywords: media competition; media for brand growth, patterns; empirical generalisations.

RESUMEN: Se han observado patrones consistentes de comportamiento de los compradores en una amplia variedad de contextos, hasta el punto de ser considerados leyes del marketing, que describen cómo las marcas compiten y crecen (Sharp, 2010).
En este estudio demostramos que estas mismas leyes también se cumplen para las marcas de medios competidoras; es decir, que existen patrones sistemáticos que describen cómo los canales de comunicación comparten y compiten por las audiencias. Este conocimiento tiene importantes implicaciones para los anunciantes que buscan tomar decisiones eficaces sobre la planificación de medios al colocar su publicidad, así como para las plataformas o canales de comunicación que desean hacer crecer sus marcas. Asimismo, se identifican un pequeño número de excepciones a estos patrones y se analizan sus implicaciones.
Se emplean datos del tipo que habitualmente utilizan los profesionales para determinar la audiencia alcanzada por sus campañas, con el fin de demostrar estos patrones en diferentes tipos de medios (televisión, redes sociales, radio, publicidad exterior, etc.). Los datos permiten demostrar estas leyes tanto entre distintos tipos de medios como dentro de un mismo medio (por ejemplo, Instagram, X, Facebook, LinkedIn, etc., en redes sociales). Asimismo, se incorporan datos muestrales de Finlandia para demostrar la generalización de los resultados en un mercado diferente.
En un mercado mediático global cada vez más complejo, es importante que los anunciantes comprendan qué pueden esperar razonablemente de los medios para garantizar la eficacia de sus inversiones. Para los proveedores de medios, resulta fundamental comprender cómo hacer crecer sus marcas.

Palabras clave: competencia entre medios; medios para el crecimiento de marcas; patrones; generalizaciones empíricas.

1. Introduction

It is an exciting time to be in media given the enormous change occurring in the field. Unparalleled levels of content, changing media consumption habits and diverse new platforms are creating a multitude of options in which brands can invest their media budgets. The likes of influencers, evolving technologies and artificial intelligence are also challenging historic ways of operating and shaping a new landscape for audiences and advertisers. While the possibilities are intriguing, for media decision-makers it is also increasingly complex to plan and evaluate. For researchers, it is timely to document if past fundamental knowledge is still applicable in this new environment.

For this special section celebrating the 25th anniversary of Revista de Comunicación, we share some important empirical work on media. It has relevance to media and marketing academics, professionals and students. We also use the study to demonstrate a research approach that, while core to knowledge creation in other disciplines for centuries, is far less well established in marketing. It has, however, been growing in popularity around the globe over the last 25 years, fundamentally challenging traditional marketing knowledge and theory (Sharp et al., 2024). Researchers following this approach are coined Empirical Generalisationists (Sharp & Wright, 1999), because the approach focuses on documenting regularities in the real world, that hold time and time again across varied conditions. Here, we focus on repeatable "laws" of media.

Importantly, while the evidence we share has been building since the 1960s, we provide contemporary evidence. This is vital, given the transformations that have occurred in the media landscape, with promises of personalised content being delivered to engaged audiences (Taneja, 2020), which would contradict what has been seen in the past. We discuss the key implications of our findings for media practice and theory.

2. Literature Review

2.1. Empirical Generalisation

The emergence of the Empirical Generalisationists preceded the launch of Revista de Comunicación (Sharp & Wright, 1999), promoted by scholars like Andrew Ehrenberg (Ehrenberg, 1988) and Frank Bass (Bass, 1993; Bass, 1995). Support for this approach to marketing science has continued, notably in Australia and the UK (Kennedy & Hartnett, 2018; Sharp & Wind, 2009;

Sharp *et al.*, 2017; Wind & Sharp, 2009), resulting in considerable knowledge development across diverse aspects of marketing. With respect to compiling robust knowledge of how advertising works, this included two conferences at Wharton with related special editions in the Journal of Advertising Research in 2009 and 2013 (Sharp, 2008; Wind *et al.*, 2013). Some of this thinking and theory around the role of advertising in building brands has been published in Revista de Comunicación (Ehrenberg *et al.*, 2004).

Key features of the Empirical Generalisationist approach include an emphasis on replication and the use of multiple sets of data (MSoD) to ensure that knowledge is robust (Ehrenberg, 1995). Observing and describing empirical regularities, is prioritised rather than beginning with theory (Ehrenberg, 1994, 1995). Patterns seen across conditions (*e.g.*, diverse markets, over time when there is dramatic change) are highly valued, while fitting models to any single dataset is not. It has been suggested that empirical generalisations have five characteristics: scope (they are known to hold across a wide range of conditions); precision (quantitatively described with parameters and effect sizes); parsimony (less is more); usefulness to practitioners and a link with theory (Barwise, 1995).

This research approach has resulted in robust findings that often conflict with traditional marketing theory. For an in-depth discussion of how the laws raise serious questions about Segmentation-Targeting-Positioning theory see Sharp *et al.* (2024). For example, this body of research also provides a strong case for the importance of media reach, when other approaches may have favoured a focus on teaching existing category buyers (Graham & Kennedy, 2022) something new about the brand. Similarly, such work counters traditional theories that emphasise the need for building brand awareness, positioning and differentiation by instead encouraging more attention be placed on building and measuring mental availability (Romaniuk & Sharp, 2021) and distinctive assets (Romaniuk *et al.*, 2007; Sharp & Romaniuk, 2010). For advertisers, this means having advertising that gets noticed and is well branded for light buyers, rather than persuasive communications built on brand love and loyalty (Ehrenberg *et al.*, 2002; Ehrenberg, Barnard, Kennedy, & Bloom, 2004).

In the present study, we describe empirical patterns (and rare deviations from these laws) in how media are used by their audiences. We then consider the implications for advertising decision makers who need to select media to communicate with their audiences, as well as for media owners who are trying to build a media brand and for marketing theorists.

2.2. Key Laws of Marketing

Before we describe what is known in media, we briefly overview four key laws of buyer behaviour.

Law of Double Jeopardy

Double Jeopardy dictates that smaller brands have fewer customers than larger brands, who use them slightly less often (i.e. are slightly less loyal) (Ehrenberg *et al.*, 1990). Double Jeopardy has been found to hold across diverse conditions from nappies to industrial buying (Graham *et al.*, 2017). Consistent with this law, brand growth mostly comes from acquiring more customers, who are predictably a little more loyal to the brand (Sharp, 2010).

Law of Duplication of Purchase

Duplication of Purchase describes how competing brands share customers with one another. Sharing is predictably related to the size of the focal and rival brands. Specifically, any brand in the market will share more of its customers with larger brands and less of its customers with smaller brands (Uncles *et al.*, 1995).

Law of Buyer Frequencies

The Law of Buying Frequencies (Ehrenberg, 2000; Uncles *et al.*, 1995) describes how buying frequency (e.g. how many buyers purchase once, twice to twenty times in a year) follows a pattern with both categories and brands having many more light than heavy users. This regularity, captured in the predictable form of the Negative Binomial Distribution (NBD), has been observed across many conditions (Dawes & Trinh, 2017).

Law of Brand User Profiles

Finally, the Law of Brand User Profiles tells us that the user or buyer base of competing brands seldom differs (Kennedy & Ehrenberg, 2001; Uncles *et al.,* 2012). That is, rival brands are mostly bought by the same sorts of buyers in terms of the demographic, attitudinal and lifestyle profiles of their customer bases. Again, it holds across time and varied conditions (Anesbury *et al.*, 2017).

Along with other regularities in brand and buyer behaviour, these patterns can be broadly described and predicted using the NBD-Dirichlet Model, a well-established stochastic model that predicts a range of key marketing metrics including brand loyalty, purchase frequency and brand sharing (Ehrenberg, Uncles, *et al.,* 2004; Sharp *et al.,* 2012). The wealth of knowledge captured in this model also demonstrates the importance of penetration as a marketing metric, underpinned by Mental and Physical Availability (Romaniuk & Sharp, 2021; Sharp, 2010). Such knowledge is changing what marketers do, as well as the theory of how marketing works (Sharp *et al.,* 2024).

2.3. Patterns in Media

While these laws have been shown to describe buying behaviour, less attention has been given to exploring such patterns as they apply to media and the audiences that they attract. This is despite a long tradition of similar pattern spotting in media data. In fact, some of the earliest research on these marketing patterns was demonstrated in media data, notably with Duplication of Viewing being discussed in a manuscript published in Nature 60 years ago (Goodhardt, 1966). Goodhardt (who co-authored the seminal work on the NBD-Dirichlet Model) had previously been based at the advertising agency Young & Rubicam where large-scale advertising, readership and audience data was accessible.

Goodhardt and Ehrenberg (1969) demonstrated the Duplication of Viewing pattern as it related to the proportion of viewers of a programme at times who also watch that programme at time t, showing that it is systematically a factor of the rating for the programme at time s multiplied by a constant. The likelihood of episodes of a TV programme being watched week after week by its audience is predictable from its popularity in the population alone. This work on repeat viewing of episodes of a programme was later extended to the repeated viewing of programmes of a similar genre, also concluding that the average repeat viewing levels tend to be low regardless of the market, the similarity of the content being repeatedly viewed, or of the measurement technique used to capture the behaviour (Barwise, 1986; Barwise *et al.,* 1982; Ehrenberg & Wakshlag, 1987). This pattern was also demonstrated across competing TV channels, which share audiences in line with their popularity (e.g., ratings not traits like programme or content type) (Barwise *et al.,* 1982; Goodhardt & Ehrenberg, 1969; Goodhardt *et al.,* 1975, 1987; Headen *et al.,* 1979).

Similarly, Double Jeopardy was also observed in a media context before being shown to describe buying behaviour for brands. It was first observed in relation to the popularity and appeal of television talent and radio personalities (McPhee, 1963), where the more popular celebrities were also predictably better liked by their audience than lesser known celebrities. Barwise *et al.,* (1979) later showed this same Double Jeopardy pattern applied to TV audiences, with program audience appreciation being systematically related to audience size. Research (Ehrenberg & Wakshlag, 1987; Goodhardt *et al.,* 1987) also showed that the smaller audiences of low rating shows watch them less regularly. Similarly, bigger television channels have more viewers, and these viewers watch not only more often, but also for more hours (Sharp *et al.,* 2009).

The Negative Binomial Distribution *(NBD)* has not received the same attention in a media context in the past, but there have been occasional data points which suggest it might also apply here. For instance, it has been shown that program viewing skews light, with far more light than heavy programme watchers, regardless of the nature and ratings of the programs (Nenycz-Thiel *et al.,* 2013; Sharp *et al.,* 2009). Taneja *et al.,* (2012) also noted that the vast majority of individuals in an audience do not use many of the media options available to them. Hours spent viewing have also been shown to skew light (Sharp *et al.,* 2009).

Finally, there have also been studies comparing the user profile characteristics of audiences for competing media platforms. Whether the law that audience profiles scarcely differ generalises across competing offerings is of particular relevance in a media context, not only because the size of the audience, but also the composition of the audience (e.g., demographics), is the basis for selling media space to advertisers (Webster *et al.*, 2006). Discussions of differences in who uses what media are common. For example, television networks use age and gender of their audiences as a basis for selling advertising space. Marketing clients have long sought to match program audiences with their brand's target market (Nelson-Field & Riebe, 2011; Walker, 1998). Broader knowledge also shows regularities like older audiences and those with lower education being more likely to use 'at home media' like linear TV, rather than media that is accessed through a computer screen (Taneja *et al.*, 2012).

While discussions of potential audience differences and their implications are common among practitioners, systematic evidence showing audiences are often and substantially different remains scarce. In contrast Sharp *et al.* (2009) did report a notable lack of audience segmentation in TV audiences. They concluded that while competing channels can vary tremendously in the size of their audience, they vary very little in the kinds of audiences they attract, just as we see in the user profiles of brand buyers.

2.4. Beyond TV

Until recently, most efforts to demonstrate these patterns in a media setting were focused on linear television (Barwise, 1986; Ehrenberg & Wakshlag, 1987; Goodhardt *et al.*, 1987; Sharp *et al.*, 2009). This is likely a result of linear television having dominated the media landscape and being so comprehensively measured. While the data available for observing such patterns remains most comprehensive in relation to TV viewing behaviour, the growth of internet-connected media has led to studies of audience behaviour in other diverse media contexts (e.g. Taneja, 2020; Webster, 2015).

A core of researchers has continued to document whether these patterns hold in other media as the industry has evolved and the potential for boundary conditions to arise has grown (e.g. viewers more readily able to access on-demand content that reflects their preferences). The Duplication of Viewing and Double Jeopardy have now been observed in movie attendance (Tan *et al.*, 2017), across magazine and other print titles (Agostini, 1962), for listening to radio content (Lees & Wright, 2013; McDowell & Dick, 2005), for website audiences (Gentzkow & Shapiro, 2010; Taneja, 2020; Webster & Ksiazek, 2012; Webster & Lin, 2002) and in social media (Klepek *et al.*, 2026).

The patterns have been observed in media contexts, even when there have been very good reasons for not expecting this to be the case. For instance, Double Jeopardy was recently demonstrated in social media in two culturally distinct markets (i.e., China and the Czech Republic). Social media platforms can be vastly different (i.e. where there are strong network effects, algorithmic personalisation varies tremendously, where powerful cultural influences over media usage behaviour exist, etc) (Klepek *et al.*, 2026), and yet we still see such laws applying.

While these studies have demonstrated how some of these patterns hold within different media types (i.e., social media, print, TV), far fewer ask the critical question of whether the patterns hold in cross-platform use (Aldous *et al.*, 2019). The exception was a study of 236 media outlets available on both television and the internet (Webster & Ksiazek, 2012). Despite very varied platform offerings, they still shared their audience, in line with their overall popularity, rather than on the grounds of the nature of the content being offered (Taneja *et al.*, 2012).

2.5. Possible Exceptions to Laws

While some rare exceptions to these laws have been observed, such exceptions are less prevalent and consequential than often assumed (Taneja, 2020). While also rare in a brand buying context, in media in particular, the laws counter key industry beliefs about how media works and hence how

media space is bought and sold. There is therefore a desire to report the existence of exceptions where they occur. Deviations from these media laws that have been put forward include:

Live events and sports broadcasts: The psychological connections that individuals experience with sports or sports teams has been theorized to explain fan commitment and loyalty (Funk & James, 2001). Sports consumers may be expected to display more persistent consumption of sports content than is expected given the popularity of that material (e.g. fans consistently tuning in to watch their team (Van Reeth, 2023)). Sharp, *et al.*, (2009) noted a small deviation from the law of audience profiles not differing with 65% of sports channel viewing being men, which is notably higher than their incidence in the population. However, attendance at cultural venues and live events, has also been shown to fit the NBD-Dirichlet Model (Trinh & Lam, 2016), so it is uncertain as to whether and by how much sports content might attract a more loyal or otherwise different audience from other content.

Cartoons: Content that is specifically targeted towards children may also be expected to deviate, specifically to exhibit stronger repeat-viewing patterns, as children are known to watch their favourite shows repeatedly (Wakshlag & Greenberg, 1979); (Abelman & Atkin, 2000). However, it is worth noting that while children are expected to be more loyal to their shows than adults, almost half of the viewers of children's TV channels are adults. Therefore, any additional loyalty towards a children's channel is likely dampened by adult audience members (Sharp *et al.,* 2009). In addition, while some have said children view more intently, Barwise, Ehrenberg *et al.,* (1982) concluded that teenagers demonstrate lower repeat-viewing levels than adults, so whether audience age affects repeat viewing of media is still debatable.

Story-Related Content: Despite some evidence that audiences are similarly loyal to programmes across genres (Trinh & Lam, 2016), there are a handful of contradictory studies suggesting that programme type makes a difference to repeat-viewing rates. Content that includes an on-going story across episodes (e.g., dramas, soap operas, and reality) has elevated loyalty compared to stand-alone content (Barwise *et al.,* 1982; Choi & Lee, 2022; Hatchuel & Cornillon, 2020; Jardine *et al.,* 2016; Zubayr, 1999). But even in such contexts, a sizable proportion of viewers for any episode (e.g. ~40% for soap operas) will not have seen the previous episode.

Educational Content: Also content-related, Barwise, *et al.* (1982) concluded that TV viewers tend to avoid intellectually or emotionally demanding programs. Theorists might well have expected audience driven content or genre sub-groupings, for instance, a 'news' audience, even if this is a grouping that views news across both internet and television news platforms (Dutta-Bergman, 2004; Jardine *et al.,* 2016; Yuan, 2011). In today's media environment, specialised educational content, such as documentaries, children's programming or news is readily accessible on demand. If it is the case that such content is viewed differently, then we would expect to see deviations from the media laws for these specialised platforms. Webster (2006) has reported consistency in programme type being a superior predictor of audience duplication. However, we acknowledge that largely researchers who have specifically looked to test for such programme-related sub-market groupings have failed to find them (Taneja *et al.*, 2012).

Physical Availability: Historically, one explanation for deviations from the laws in buyer behaviour has been physical availability. Private label brands are an example, where for those using a particular retail outlet, that outlet's private label brand is available, whereas it is not available for most of the population who are shopping elsewhere. In an analysis of the whole market, it therefore presents as a niche brand, with a small audience who is more loyal to that brand than would be expected given the brand's size in the full market. This rationale is also relevant for deviations in a media context. For example, higher sharing across late-night content may be because the same people stay up late, or similarly to programmes shown in succession due to the "inheritance effect" (Ehrenberg *et al.,* 1975; Webster, 2006). Access to paid content (e.g. subscriptions) is also expected to limit availability to subscribers only. An example of this was reported by Sharp, *et al.,* (2009), demonstrating extra channel loyalty across a common provider.

Somewhat related to this rationale, Spanish-speaking television channels in the US have been identified as having higher than expected loyalty, and more recently foreign-focused websites likely due to their diasporic audiences (Taneja, 2020).

Historically, it has been suggested that deviations are unlikely to be common or large, as there are no 'addicts' to particular types of content (Ehrenberg *et al.*, 1975), but with all of the transformations to media it is timely to revisit this topic.

2.6. Today's Media World is Different

Confirmation or falsification of extant knowledge through replication, particularly in the face of significant change, is a key feature of Empirical Generalisationist research.

Arguably, beyond a few explainable deviations, there is good reason to propose that the patterns themselves may not hold in today's media environment. Notably, audiences are moving away from watching media with others towards their own screens. Co-viewing potentially curbs an individual's ability to be loyal to their preferred content, while personal screens may increase loyalty (Morley, 1986). With multi-screen use (televisions, computer, mobile devices and tablets) becoming far more prevalent, and multi-tasking across screens more normal, compromising for others' preferences may no longer constrain loyalty. Increased availability of on-demand media, to "a world of anywhere, anytime media", would also seem to mitigate justifications for the laws holding on the grounds of availability (Taneja, 2020; Taneja *et al.*, 2012).

Niche content is reported to be increasingly common (Webster & Ksiazek, 2012), and audience characteristics remain a key consideration in the buying of media for advertising, especially with the evolution of technology making audience targeting more automatic. Coupled with audiences spending more time with media (Barwise *et al.*, 2020), it is timely to revisit whether such media patterns are still evident.

However, the media environment has encountered notable changes in the past, from the printing press to online magazines, from televisions in homes to video in people's pockets, and yet these laws have broadly held. The use of media is also well known for its habitual qualities, which are often timed to patterns of work, leisure, and commuting ((LaRose, 2010; Webster *et al.*, 2006), with new types of viewing broadly meeting similar needs to traditional television (Barwise *et al.*, 2020). It may well be that the structural features of social life still leave their mark on how people organize their use of media (Taneja *et al.*, 2012), even in the face of other, transformative changes.

Given this, we propose the following hypotheses:

H1: *Double Jeopardy will continue to hold in media usage*

The biggest difference between competing media will be in the size of their audience, not in how loyal their audience is.

H2: *Duplication of Viewing/Listening Law will continue to hold in media usage*

Competing media will share their audiences with rival media in line with their size.

H3: *Law of Viewing/Listening Frequency will hold in media usage*

Most of the audience of a media will be light users of that media in any relevant period, with a long tail of users with high levels of frequency of use.

H4: *Competing media audience profiles will seldom differ*

Competing media will mostly appeal to the same kinds of audiences (demographically, attitudinally and behaviourally).

Building on a rich foundation, this study expands the range of media explored (e.g., social media, online video streaming, OOH, etc) and looks at how the patterns apply across, as well as within types of media that have long been thought to be very different from linear TV. Furthermore, most of the past media research has focused on Double Jeopardy and Duplication of Viewing. We also extend our exploration to the other laws in today's media context. Given there is so much choice of content and

with technologies able to tailor and target individuals within an audience, we aim to not only document if the patterns exist in this different media landscape but also look for meaningful deviations.

3. Research Method

Consistent with an Empirical Generalisationist approach, we take quantitative media data from 2025, like that used widely by media agencies and demonstrate whether the patterns and deviations discussed above are present. Our focus is on replication to test if prior knowledge holds and on description of regularities and meaningful deviations, rather than on fitting the NBD-Dirichlet Model (or other models) to this data, or on reporting on the statistical significance of such a fit. This is a conscious decision aligning with the Empirical Generalisationist approach to knowledge development.

The data

The core data upon which we report is from the United Kingdom. A template to specify the required data was designed by the academic authors, while the data was provided by the industry practitioners in the markets examined. A range of sources was needed to provide the required data points, drawing on relevant panels (in the UK, IPA Touchpoints 2024, YouGov, Techedge / BARB and Origin Media Landscape Studies and Finnpanel TV-meterpanel, in Finland). Such data is used extensively by media providers and agencies to make their media purchases. To provide an indication of the scale of such data, in 2024, the IPA Touchpoints panel included around 6,000 audience members aged 15+, and this sample was nationally representative. For each panellist, thousands of connections with the different media are captured across the data collection period (which ran from September 2023 to April 2024). Similarly, the YouGov panel has over 3 million registered panellists in the UK who answer regular surveys on a range of different topics across the year. For individual surveys on media use, between 2,000 and 4,000 respondents provided the data examined.

Across the data sources reported, we include examples of social media, linear television, video-on-demand (VOD) platforms (including broadcast connected TV (CTV)), print media, radio and outdoor (OOH).

4. Key Findings

Overall, all four laws are broadly present in this new data. This includes the law of viewing/listening frequency and the audience profiles seldom differ law, which have not been extensively observed in media data in past studies. The Duplication of Viewing and Double Jeopardy laws, while more established in media, have now been shown to hold in a very different media environment, at a later point in time. In addition, we find that these patterns apply across more diverse media. This is important as today's practitioner is no longer choosing between NBC and CBS (in the US) or between América Televisión (Canal 4) and Latina Televisión (Canal 2) (in Peru) but also between social media, television and OOH and then choosing which specific platforms, sites, channels to use.

Specifically, we find:

Double Jeopardy broadly holds. Small media have smaller audiences (i.e., lower penetration) who also watch for less time or use the media less frequently (i.e., are less loyal) than the audiences of larger media. Initially, we demonstrate this pattern using data from Finland, with the pattern evident across key media in that market (the arrow indicates the pattern in Table 1).

Table 1. Double Jeopardy Across Media (Finland)

Platform	Penetration (% use weekly)	Average Time Weekly (mins)
Television	80	972
YouTube	50	131
Netflix	41	86
TikTok	31	80
Average	51	317

Source: Finnpanel TV-Meterpanel, 52 Weeks 2024.

Table 2 shows the pattern for Linear TV in the United Kingdom and with both the average number of sessions in a month and minutes per session mostly declining with audience size. There are a few wobbles to the pattern which we discuss further when commenting on deviations from the laws.

However, with Double Jeopardy in brand buying the big difference between the biggest and smallest brand is in their penetration (the equivalent here is weekly usage) rather than for loyalty (here the number of sessions or minutes per session). This is the case for number of sessions (as seen in the UK in Table 2), where there is nearly a 5-fold difference in the number of users between the biggest and the smallest channels, but only a 3-fold difference in the number of sessions metric. The expected scale of the difference between penetration and loyalty metrics is not, however, as expected in this media data for some loyalty metrics, notably view time, where there is a 22-fold difference between the biggest and smallest options.

Table 2. Double Jeopardy in Linear TV (UK)

Channel	Usage %	Average Sessions (month)	Mins per Session (week)
ITV1	68	11	179
Channel 4	62	6	60
Channel 5	53	6	47
ITV2	30	4	16
E4	30	5	19
ITV4	26	3	12
Film4	24	4	14
U&Dave	22	4	10
More 4	22	3	11
ITV3	22	6	28
5STAR	19	4	9
Sky Sports Main Event	17	4	13
Quest	17	5	12
Sky Showcase	17	2	4
U&Drama	16	6	18
Really	15	4	10
Sky News	14	6	11
U&Yesterday	14	4	7
ITV1	14	3	6
Channel 4	14	4	8

5x 3x

Source: Techedge / BARB.

Some (but not all) of the previously observed deviations from Double Jeopardy are also apparent in this 2025 data. Most notably, some drama-focussed TV channels (i.e., U&Drama and ITV3), have somewhat higher levels of loyalty than would be expected given the size of their audience alone. We note, however, that while some deviations are present, some of the deviations are not in the expected direction (i.e. Sky Showcase – now called Sky One).

In Subscription VOD (Table 3), we also see one of the expected deviations, with Disney+ (dominated by children's content), being watched for slightly longer than we would expect based on its size in terms of number of users.

Table 3. Double Jeopardy in Linear TV (UK)

Platform	Penetration %	Ave Duration (mins/weekly)
Netflix	47	155
Amazon	29	55
Disney+	22	60
Paramount+	5	7
AppleTV+	4	5
Discovery	2	2

Source: Techedge / BARB.

We also demonstrate that the Double Jeopardy pattern applies to social media platforms (See Table 4). YouTube's audience appears slightly less loyal than expected; however, YouTube's content is often more akin to that provided by TV channels. If YouTube were placed in Table 2, it would not stand out as a deviation from that competitive set. Despite small social media platforms being hit twice with smaller audiences who are less loyal, we again note the substantial variation in the time spent with big versus smaller platforms, which is not aligned with the typical Double Jeopardy pattern (where there is little but systematic variation in the loyalty levels of competing offers).

Table 4. Double Jeopardy in Social Media Platforms (UK)

Platform	Penetration %		Ave Duration (mins/weekly)	
WhatsApp	72		80	
Facebook	57		55	
YouTube	43		25	
Instagram	33		31	
X (Twitter)	17	24	14	80
TikTok	17		14	
Snapchat	11		13	
LinkedIn	7		4	
Telegram	3		1	

Source: IPA Touchpoints 2024 Survey + YouGov.

Thus, as hypothesised, bigger social platforms/TV channels win twice – they have larger audiences (i.e., higher penetration) and those audiences also spend more time with the medium (i.e. in sessions and time per session).

The *Duplication of Viewing Law* also continues to broadly hold. This is demonstrated across even more types of media than has been considered in the past. Table 5 shows that the different types of media in the UK broadly share their audiences with competing media in line with the audience size of those platforms. This is evident in the declining average duplication in the bottom row of the table (i.e., the arrow indicates the pattern).

There were some exceptions (key ones are highlighted), where sharing is meaningfully different from expected. Notably, publishing/print compete less directly with social media and online video. There is less sharing than expected between other online video and linear TV. Print shares more of its customers with cinema than we would expect.

Table 5. Duplication of Viewing Across Channels (UK)

	% users who also use...										
Users of ...	Pen	OOH	Linear TV	Social Media	Live Radio	Other Online Video	Publishing (Online)	BVOD	Digital Audio	Publishing (Print)	Cinema
OOH	95		81	67	56	41	41	40	31	29	8
Linear TV	81	95		65	58	36	41	43	30	31	8
Social Media	66	96	79		57	48	42	42	34	24	9
Live Radio	55	96	85	68		41	41	43	33	29	8
Other Online Video	41	95	72	78	55		46	41	38	21	8
Publishing (Online)	40	96	83	70	56	46		44	39	33	9
BVOD	39	96	89	71	60	42	45		37	27	8
Digital Audio	30	97	80	75	60	52	51	49		29	10
Publishing (Print)	28	97	88	56	56	30	47	38	31		11
Cinema	7	98	84	76	60	42	48	43	40	40	
Average		**96**	**82**	**70**	**57**	**43**	**47**	**43**	**35**	**30**	**9**

Source: IPA Touchpoints 2024 Survey + YouGov.

This same pattern was also evident across audience sharing for platforms within a type of media. For example, when we considered linear TV channels in the UK, Channel 5 with a penetration of 27%, shared more of its audience (75%) with ITV1 (the largest channel, with 48% penetration), and less of its audience (21%) with ITV3 a far smaller channel (with 11% penetration).

The pattern was also apparent in radio listening behaviour, where radio stations shared their audiences with other stations in line with audience size. Similarly in social media, Subscription and Broadcast VOD.

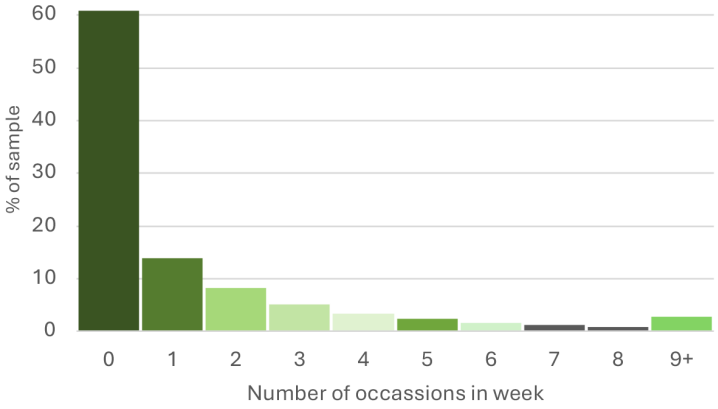
As with Double Jeopardy, the Duplication of Viewing pattern, however, did not hold for newspaper or website publications, which tells us they compete less directly with one another based on size (readership/viewership) alone. There were 15 newspapers and over 100 websites included in the analysis including small platforms offering specialised content, which may result in niche audiences. Notably, big media do not uniquely attract niche audiences, so niche offerings are unlikely to be a path to becoming a large media. This matches similar findings in music listening (Anesbury *et al.*, 2022).

Groups of related deviations from the Duplication of Viewing law are referred to as partitions (a sub-pattern or sub-market) where there is more sharing between some offerings, and less with offers outside the partition (Dawes, 2016). Where observed, they are often reflective of functional differences. In a media context this could be content genre or language differences. This data shows some deviations of excess sharing of sports-based platforms and for offers included within a subscription bundle. Partitions were, however, secondary to the main Duplication of Viewing pattern that mostly applied across and within most media examined.

The frequency with which media are used in this data is well described by the *Law of Viewing/Listening Frequency,* so the majority of any medium's audience skews light or rarely uses the platform, consistent with a negative binomial distribution.

Figure 1 shows this for Commercial Broadcast Video on Demand (BVoD) in the UK for adults 18+. Just over 60% of the population of the UK have not used BVoD at all in the week, 13.9% have used it once in a week, 8.2% have used it twice, 5.1% 3 times… with the final bar showing 2.7% of the population using it nine times or more.

Figure 1. NBD in Commercial BVoD (UK)



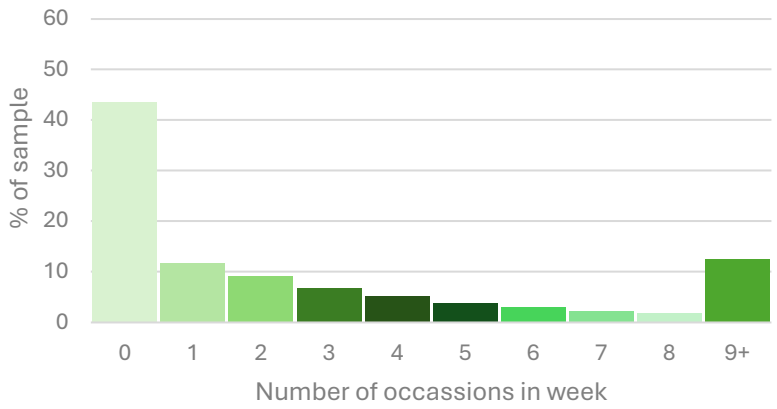
Source: Telmar Plan (IPA Touchpoints 2024 Survey).

This distribution was explored for nine different media, with BVOD, SVOD, YouTube, cinema, radio, digital audio and publishing print showing the expected pattern. Figure 2 demonstrates the remaining distributions. The notable outliers are for Out-Of-Home (OOH), which appears different given the low numbers of people who are not exposed each week and a high number who are exposed often and Commercial Linear TV where nearly three quarters of adults watch 9 or more times a week. Excluding these for now, it is typical for many people not to use each medium at all in a week and those that do, skew light (with a tail of heavy users who use each frequently).

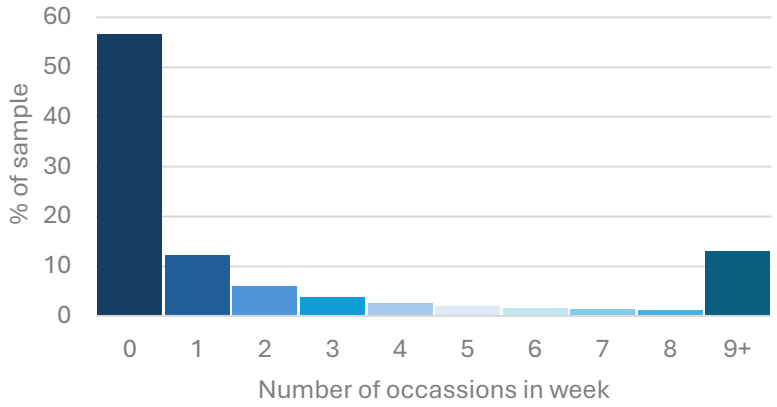
The expected pattern is easier to see when it is truncated for only those who used each medium at least once in the period (i.e., non-users are removed), with the cumulated bar for 9+ exposures removed given it is combining different numbers of occasions (Figure). OOH and Linear TV each have a very long tail of people with more than 9 exposures per week relative to other media.

Figures 2A-I. NBD Distributions by Media Types for Frequency of Use (UK)

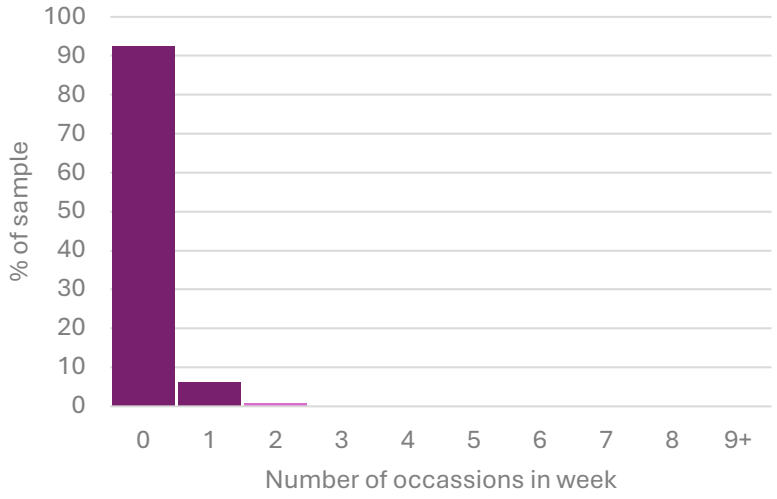
A. SVoD (Amazon Prime Video, Apple TV+, Discovery+, Disney+, Netflix, Paramount+)



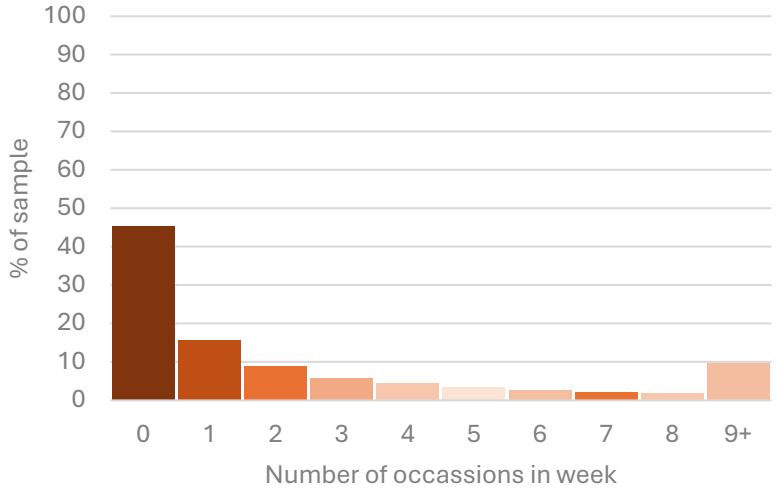
B. YouTube



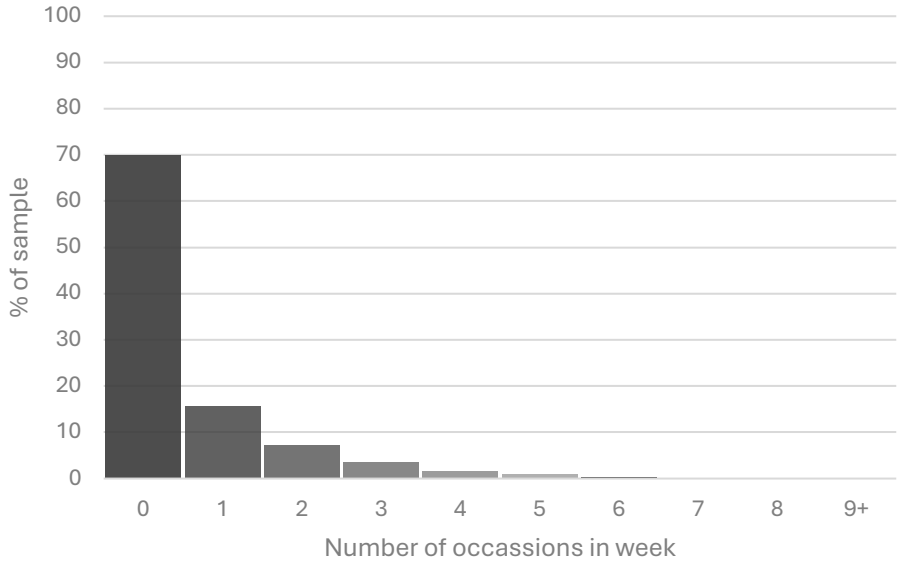
C. Cinema (All Audience Guaranteed Packages)



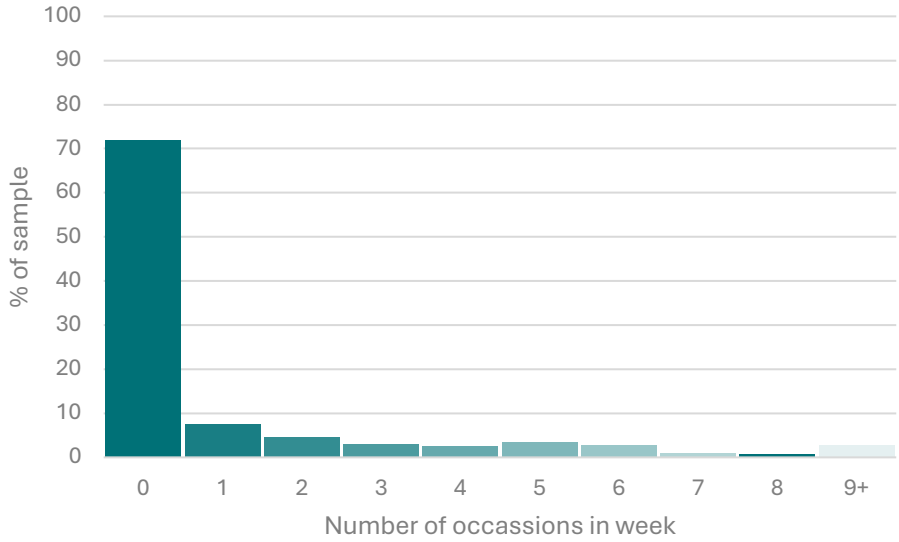
D. Commercial Live Radio



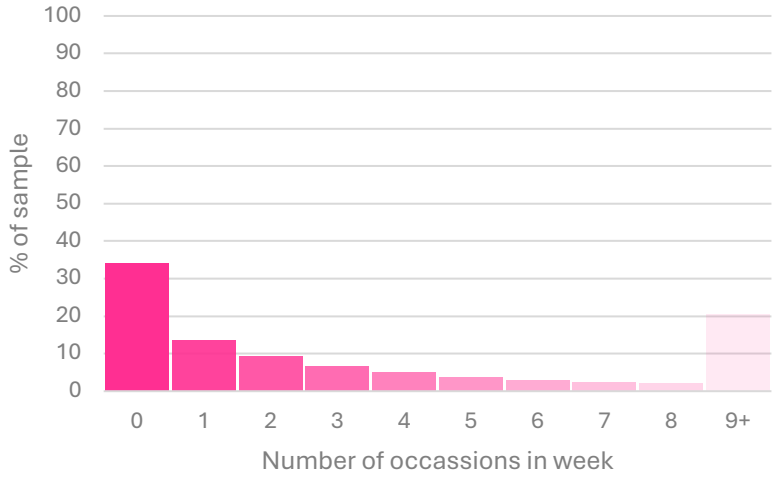
E. Commercial Digital Audio



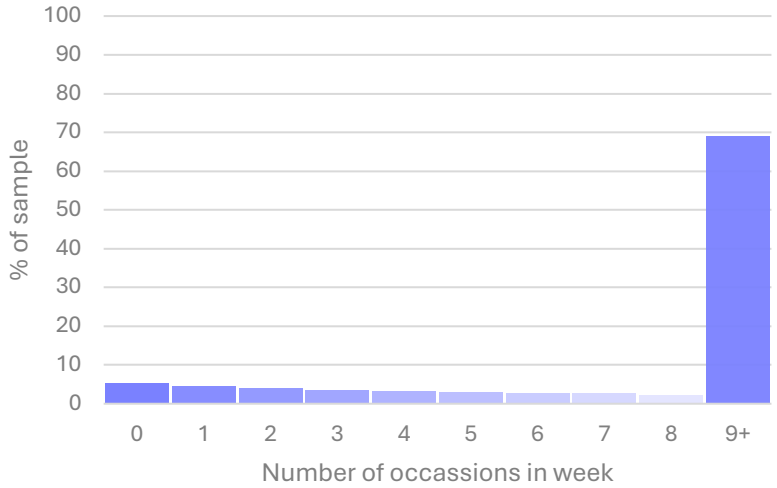
F. Print (PAMCO Print - News Brands - Dailies)



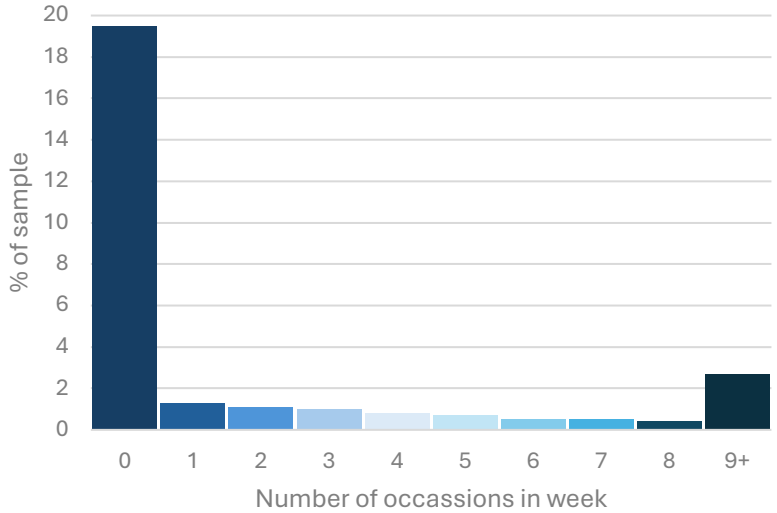
G. Social Media (Facebook, Instagram, TikTok, Telegram, Snapchat, X, LinkedIn)



H. Out of Home (All environments/dimensions)



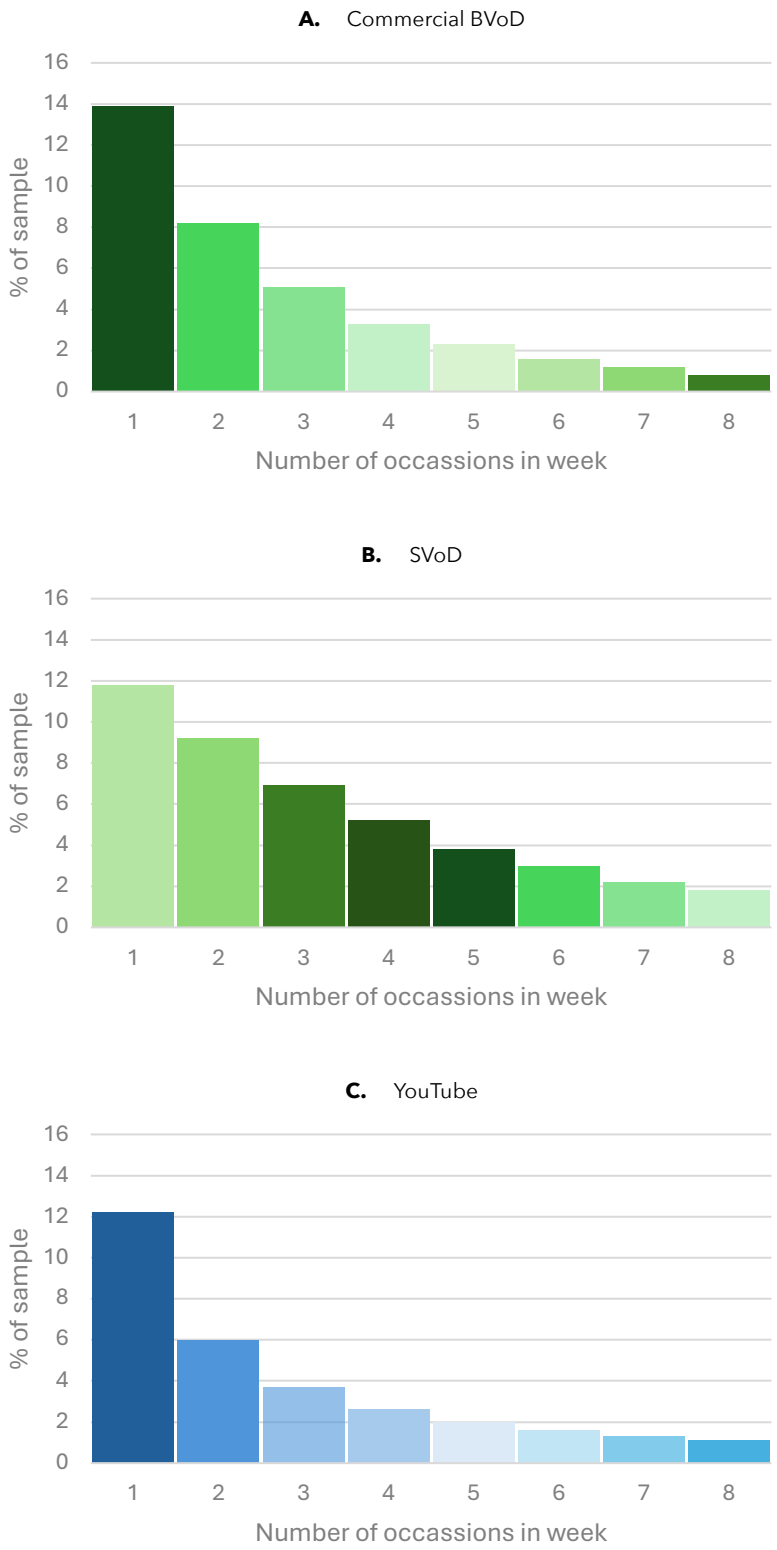
I. Commercial Linear TV

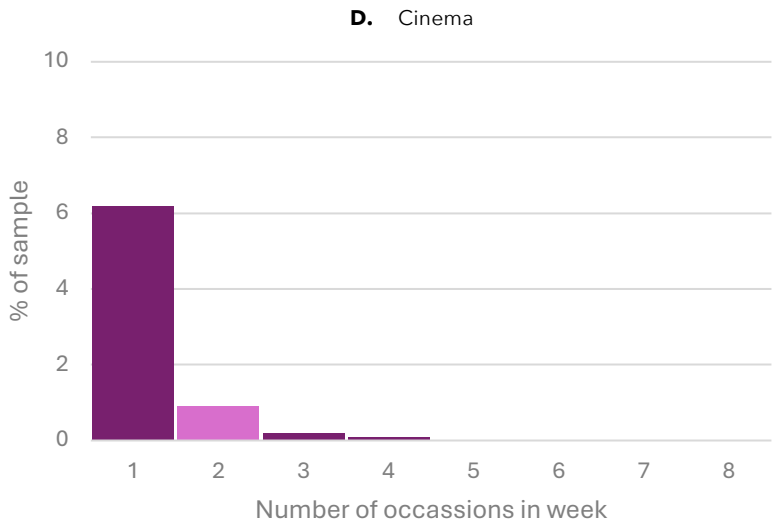


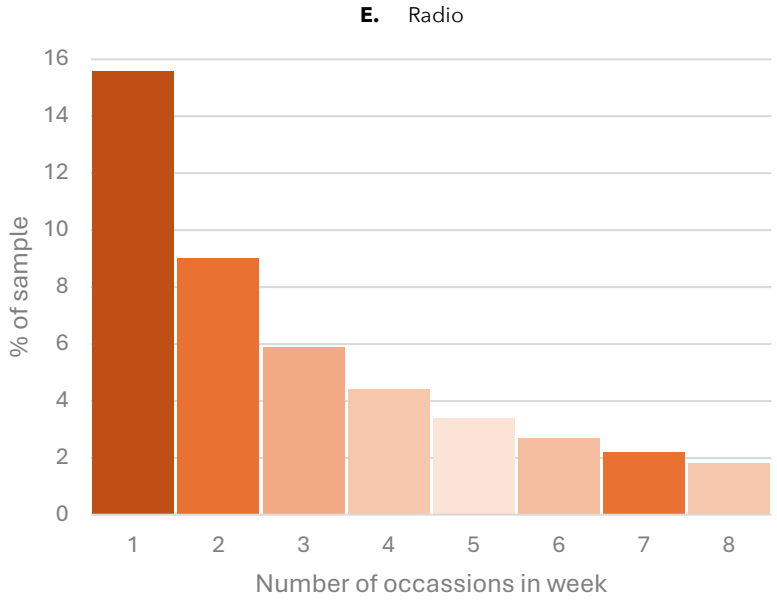
Source: Telmar Plan (IPA Touchpoints 2024 Survey)

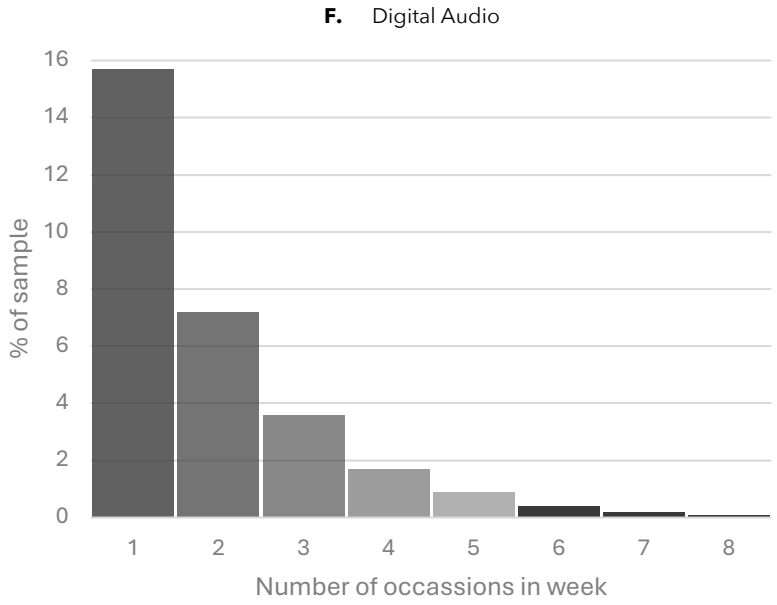
Once truncated, Figure shows the regularity of this distribution shape across the media types – that is we see the expected NBD shape clearly.

Figure 3A-I. Truncated NBD within Media Types for Frequency of Use (UK)

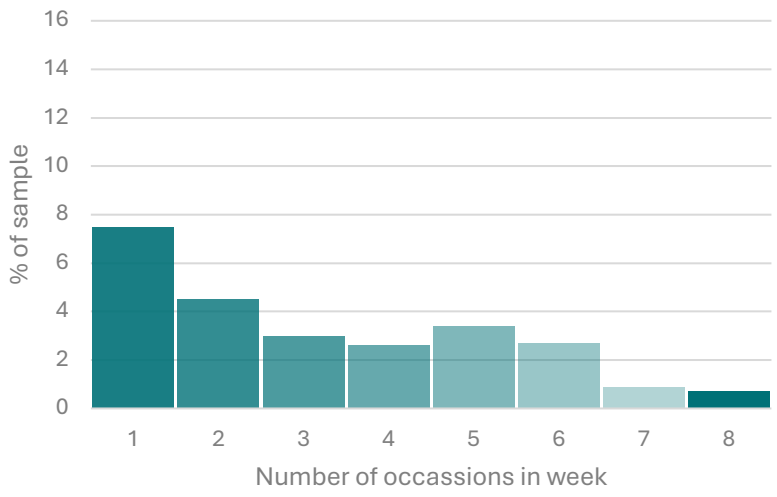



D. Cinema
10
8
6
4
2
0
% of sample
1
2
3
4
5
6
7
8
Number of occassions in week

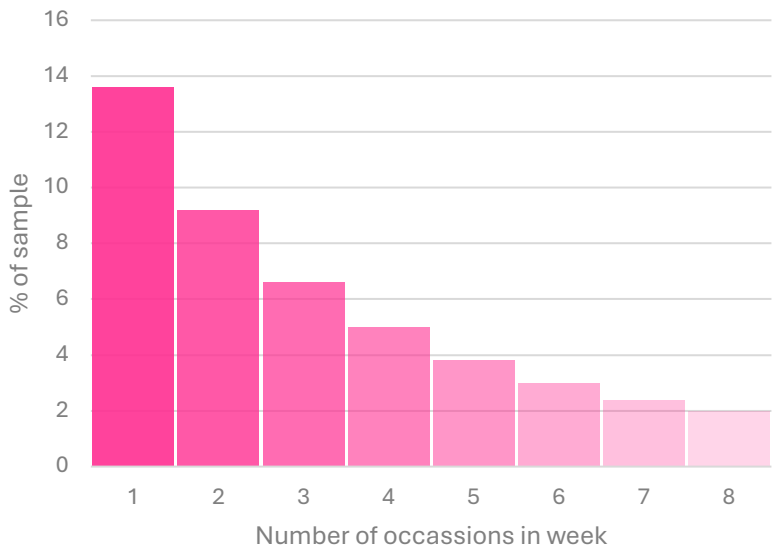

E. Radio
16
14
12
10
8
6
4
2
0
% of sample
1
2
3
4
5
6
7
8
Number of occassions in week


F. Digital Audio
16
14
12
10
8
6
4
2
0
% of sample
1
2
3
4
5
6
7
8
Number of occassions in week

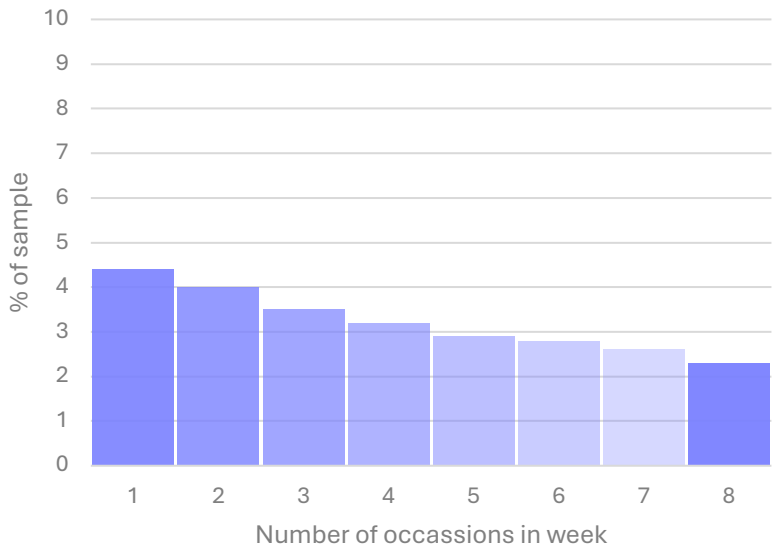
G. Print



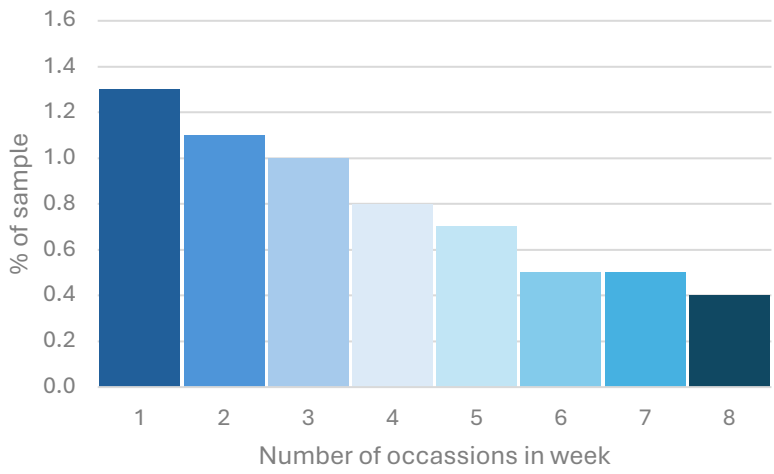
H. Social Media



I. Out of Home



J. Commercial Linear TV



Source: Telmar Plan (IPA Touchpoints 2024 Survey)

Finally, we report upon the *media user/audience profiles* to explore if competing media have audiences with mostly similar, or different, profiles. We do see some deviations, particularly for newspapers and websites but mostly deviations are rare. Media (at the level we are considering) mostly do not achieve different audiences, and where differences do occur, the difference between the audience of a medium and the average audience of any platform mostly remains small.

We considered 62 profiling variables, including a range of demographics, attitudes and lifestyle variables in the UK. We also considered how media audience profiles differed across audience characteristics in other markets (USA, China, and Finland). Our results were remarkably consistent across markets, profiling variables and most media types. Table 1 summarises the UK results. Specifically, some 800+ comparisons were made between the proportion of each media's audience who held a characteristic (for instance, were male or agree with a statement like "I am more loyal to brands that I am a loyalty member of") and the average proportion of all media's audience who held that trait or agreed with that statement. Only 4% of the tested combinations deviated by more than 5 percentage points from the average media audience profile and no variable had a Mean Absolute Deviation across the tested media above 3.

Table 1. Social Media Audience Profiles (UK)

	Type of Profiling Variable							Total
	Gender	Age	Religion	HH Size	Work Status	Education	Attitudes	
Number of variable/ platform combinations considered	26	91	143	130	78	91	247	**806**
Deviations over 5% deviation	4	10	1	3	11	0	7	**36**
% deviating	**15**	**11**	**1**	**2**	**14**	**0**	**3**	**4**
MADs >5	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

Source: IPA Touchpoints 2024 Survey + YouGov

While we do see some larger differences in the deviations of different media for specific kinds of profiling variables (i.e., gender and work status in relation to social media, age for print), media still compete for remarkably similar audiences considering the amount of emphasis that is put on matching audiences to an advertiser's chosen target market. Media might have been expected to deviate from this pattern, but the differences are fewer than perhaps assumed.

While across the UK data, 96% of deviations were 5 percentage points or less, the noteworthy exception was print media, where 22% of the deviations tested were more than 5 percentage points (especially age, household size, work status and a range of different attitudes). While there may be opportunities for media to appeal to distinct sub-segments or particular markets (e.g. the elderly, computer enthusiasts), for most media it is the size of their audience and not a unique audience profile that is critical to their success as an advertising channel.

5. Discussion and Implications for Practice

While the applicability of fundamental patterns to a media setting has long been recognised (Ehrenberg & Goodhardt, 1969) and has shaped practice by answering questions such as should an extra channel be launched (Barwise, 1977), or what is the scope for subscription (Ehrenberg & Barwise, 1987), different questions arise for today's media practitioner. Advertisers are seeking to evaluate the effectiveness of their media plans and schedules, including their media mix decisions in an environment where the choices are extensive.

Our findings that Double Jeopardy, Duplication of Viewing and the Law of Viewing Frequencies hold, reinforce and extend the evidence on the value of big media for efficient and effective media decision making and to deliver reach (Goodhardt *et al.*, 1987; Graham & Kennedy, 2022; Romaniuk et al., 2013). Yet it remains common for advertisers to stop using traditional big media and move much of their spending toward smaller niche outlets in the hope of reaching more engaged audiences (Taneja, 2020), higher attention and/or being more efficient which can be inconsistent with the evidence of media for brand growth. We hope, having demonstrated that these patterns remain robust, that practitioners will appreciate the implications even where budgets are restricted and reliable comprehensive media measurement is difficult (Webster & Wang, 1992).

For media owners, these results suggest that the path to building a successful media brand remains the same as growing a brand, that is, to grow media needs a larger audience, rather than a specific kind of audience, a substantially more loyal audience (Sharp *et al.*, 2009) or a particular kind of content (Tan *et al.*, 2017). Media brands largely attract their fair share of light and heavier media users, regardless of the content they offer on their platforms.

While we provided some confirmatory evidence for previously observed deviations (e.g., drama, sports and children-focused channels having slightly higher levels of loyalty, print media do appeal to a different audience than connected media), these results still support the findings of Sharp, *et al.*, (2009) that deviations are rare and small relative to the overall patterns. Thus, for advertisers the overall size of the audience should remain a key consideration when buying advertising space, rather than the specialised content of competing platforms, or claims they make about the unique characteristics or ability to target audiences.

Functional differences between media are apparent as deviations from the Duplication of Viewing law. For example, printed media share less of their audience than we would expect with internet-enabled media (particularly online VOD) and more with cinema audiences. This can represent opportunities for some brands and help these media owners understand their offer. There can be a role to incorporating these media to increase the likelihood of maximising the cumulative reach of their campaigns (Romaniuk *et al.*, 2013; Webster & Ksiazek, 2012). Whether platforms are, or are not, included within subscription bundles can impact cumulative reach. Such bundling is the media equivalent of a physical availability justification for a partition (Sharp *et al.*, 2009; Webster, 2006). With media users now able to choose when and where they watch/listen, over sharing of an audience between channels is no longer as a result of Ehrenberg et al., (1975) "interference effect" (e.g. viewing one program or channel reducing the opportunity to view another broadcast at the same time), but rather relates more to the availability of channels (e.g. through subscription bundling).

The application of the NBD to this media data also has implications for reach-based media planning practice recommendations (Ephron, 1995; Jones, 1997) and important implications for media planners with regards to scheduling, specifically the value of spreading a campaign over time (i.e., continuity scheduling) over bursting. As most of the audience of a platform would be considered light users of that platform, repeated placement of advertising messages across time is a necessity for ensuring a large audience is reached.

Consistent with the observation that a more extensive media mix will require additional creative costs and more management attention (Romaniuk *et al.*, 2013), we also see the value in using fewer, big media by prioritising the largest media first, with additional media used only where they can add quality cumulative reach. Cumulative reach measures across media are rare but demonstrate how reach can be built across commercial media and even achieve lofty heights in reach, with a surprisingly small media mix (Table 7). This should however not be interpreted as evidence that most advertisers can achieve these maximum reach numbers through only a handful of channels, as achievable reach will depend heavily on factors including budget, inventory availability and seasonality.

Table 7. Cumulating Reach Across the Media Mix

	Maximising Unduplicated Reach across Platforms	
Media	**% Unique audience reached in a week**	**Cumulative % reached in a week**
Commercial Linear TV	83	83
YouTube	12	95
Meta (Facebook & Instagram)	3	98
OOH or Commercial Radio or SVOD Ad-Tier or Commercial Music Streaming	1	99
Total		**99**

Source: Origin Media Landscape Study Q3 - Jul-Sep 2025.

With competing platforms largely having broadly similar audiences, there is further support for audience size (rather than composition) being a key criterion for media planning. As suggested in relation to linear TV (LaRose, 2010; Rosenstein & Grant, 1997; Webster et al., 2006), it is more likely that the habits of life drive how the audience will use media, rather than specific audience traits.

That the laws are evident across very different media is good news for media providers and advertisers. The guidelines for effective media management and the buying of advertising space are relevant across media types and even in a dynamic media landscape. The existence of some deviations does little to erode the value of the more broadly applicable laws, although given media also come at different costs it is worth considering the associated expenses of alternate media choices and mixes.

Many practitioners still subscribe to a view that there is more to a successful medium than the size of its audience (Abedi & Koslow, 2022; Herrmann & Ford, 2023) and we also acknowledge that all media are not equal in terms of their ability to be noticed and build the memories that matter for brands. Furthermore, for some specialised brands and categories (e.g. technical B2B offers, high end luxury, tiny brands, geographically limited availability) big media may not be needed and/or too expensive. But with the consistency of these patterns over time and context, it suggests that practitioners can worry less about audience preferences, attention, engagement, audience characteristics and the like, and worry more simply about the number of potential buyers that their messages reach (assuming quality media to build relevant memories).

This study also builds on academic knowledge, media research and theory development.

To begin, when comparing media, including for Double Jeopardy and the broader NBD-Dirichlet, the loyalty metric used matters. We recommend the number of sessions used not total minutes to most clearly see expected patterns. While media with larger audiences

will also have more loyal audiences, the amount of time spent with a platform can vary far more between big and small platforms than the size of their audiences. While there is little disagreement with the notion that advertising is more likely to be seen if more time is spent with it, it is more hotly debated as to whether extra exposure time negates advertising that reaches more potential buyers, but for less time (Elsen *et al.*, 2016; Goldstein *et al.*, 2015).

Another implication from this study is that we possibly misclassify some platforms in terms of the market in which they compete. For example, YouTube is unusual for a social media platform, but is very typical when compared to connected TV platforms. Media owners should compare their offerings to an appropriate competitive set so that an accurate picture is drawn of the platform's performance.

The value of replication and Many Sets of Data (MSoD) is core in an Empirical Generalisationist approach to knowledge development. Several sets of data have been incorporated in this study, but the authors also encourage readers of Revista de Comunicación to make contact should other data be available to examine the existence of such patterns in other contexts, including South America. Testing the limits of empirical generalisations teaches us a great deal about how the world works.

While theoretical explanations of such patterns have historically been statistical or probabilistic in nature (Webster & Wang, 1992), in brand buying the evidence is building to new market-based asset theory including the importance of mental and physical availability (Sharp *et al.*, 2024). That the laws hold in media suggests the same factors (i.e., penetration, mental and physical availability) are also likely to matter in this context. The evidence also adds support for reach-based planning (Jones, 2007; Romaniuk & Sharp, 2016; Sharp, 2010), with continuity to maximise the impact of exposure recency (Ephron, 1997).

There are two competing theoretical perspectives on how the media landscape may evolve. Firstly, long-tail theory (Anderson, 2006), predicts that the media industry will continue to fragment and that this in turn will see a rise of more and more small players who will succeed by building specialised platforms and loyal followings. Other theorists (Klepek *et al.*, 2026; Shapiro & Varian, 1999) have proposed that network effects will consolidate the marketplace around a few large platforms which attract mass markets with widely appealing content. The durability of these patterns across such transformation supports the later network effects thesis as the most likely future of the media industry and supports the value of big media.

The observation of these patterns in a media context also reinforces knowledge about loyalty, including that there is little evidence that audiences are composed of devoted loyalists (Webster & Ksiazek, 2012) and highlights that audiences have media repertoires (Webster & Ksiazek, 2012).

"There is nothing as practical as a good theory and few things as harmful as a bad one" (Barwise, 1995). Science is a process in which data and theory interacts (Bass, 1993). In this study, we have reported observed patterns which suggests greater support for some theories. Advances in marketing knowledge flowing from the Empirical Generalisationist approach have gained traction in academic circles and have been valued by practitioners in much of the world. There is scope for wider application of this approach in South America, as is common in the natural sciences and building on foundations like the few individuals have looked at recurring patterns across brands, countries and categories (e.g. Pablo Farías, University of Chile) or replications and extensions (e.g. Carlos M. Baldo from Argentina), both of which are core to the discovery of empirical generalisations. Through this paper we hope to raise awareness and interest, to encourage others to take an Empirical Generalisationist approach to media and marketing research.

6. Limitations and Future Research

This paper has focused on fundamental patterns at a very high level (across media and platforms within a media type). This has value for some media decision making (e.g. which media or platforms to prioritise). However, for other decisions more disaggregated data is

needed. For example, our data reports on platform reach, whereas individual advertisers, particularly those with restricted budgets, will not necessarily achieve such reach. Similarly, the OOH included in our data was all OOH. We would expect considerable variation in the reach possible with specific OOH sites or a subset of cinemas or magazines. We again acknowledge that these patterns are simplifications and that there are additional complexities (e.g. between markets, time of day (Headen *et al.*, 1979) that should be investigated. Understanding how these patterns play out across and within media with different investment levels is important.

As Empirical Generalisationists, even with these patterns withstanding considerable testing, we encourage the ongoing and continued testing of possible boundary conditions that may arise as the media environment continues to transform (e.g. with AI, growth in retail media). Media is very different across marketplaces (e.g., in some markets large screens are far less common and mobile devices more so, in others particular social media are not accessible, despite being big players in other markets, etc). Our data was mainly collected in the UK, albeit with some examples and insights from Finland, China and the USA. Adding South American research would be highly valuable for demonstrating how widely (or not) the patterns extend and where there are deviations; this will build tremendously on our understanding of how media works.

7. Acknowledgements

Thanks to Hearts United and MTV Finland for the provision of data.

8. Contributions

Roles	Author 1	Author 2	Author 3
Conceptualization	X	X	
Formal analysis	X	X	X
Fundraising			
Project management	X	X	
Research			
Methodology	X	X	
Data processing	X	X	X
Resources			
Software			
Supervision	X	X	X
Validation	X	X	X
Data visualization	X	X	
Writing - original draft	X	X	
Writing - review and editing	X	X	X

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