Media planning: Exploration of the media selection decision making process in the digital environment

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Abstract

Media planning, the role of selecting the most efficient media channels through which to deliver effective marketing communications, continues to be complicated by the ongoing digitisation and proliferation of media vehicles and resulting fragmentation of target audiences.

Soberman (2005) believed that this represented an opportunity for marketers to use better quality data to develop more effective media strategies, although noting that targetting remained a difficult and intensive process (pp. 428). Many authors have since confirmed that these changes have reinforced the complex, silo driven, intra-media planning environment, where channel decisions are taken in isolation via unrelated and unconnected media measurement that complicate cross-media strategy and budget allocation (Assael, 2011; Egan, 2014; Havlena, Cardarelli, & De Montigny, 2007; Schultz, Block, & Raman, 2009b; Taylor, Kennedy, McDonald, & Larguinat, 2013).

This research evaluates how the underlying media selection decision making processes, such as targetting and effective frequency modelling, are changing, and whether a new planning process framework can be identified to integrate such media decisions and improve the delivery cross-media effectiveness.

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Background

Media Planning, the process of setting the media strategy and selecting the media channels through which to deliver effective communications (Soberman, 2005), and a topic which supported its own journal, the Journal of Media Planning from 1982-91 (Pasadeos, Barban, Yi, & Kim, 1997)

A number of older models placed media planning and the setting of the media strategy at the culmination of a communications planning process (Figure 1), in that, the advertising strategy and creative strategy/execution are determined before the media strategy and selection of media class or vehicles (Belch & Belch 2008; Sissors & Petray, 1976, cited by Cowan & Abratt, 1999). In such a model the media strategy is seen primarily as a cost and reach focused exercise, identifying the building blocks for a media schedule (Belch & Belch, 2011; Lane, King, & Reichert, 2010; Percy & Rosenbaum-Elliott, 2009). However, there has always been more to media planning than just the optimisation of reach and frequency, and numerous researchers

Figure 1 Five Step Planning Model (Belch & Belch, 2008)

have proposed media selection models to help make superior scheduling decisions in the face of the complexity and very large volume of information available (Calantone & de Brentani-Todorovic, 1981; Charnes, Cooper, DeVoe, Learner, & Reinecke, 1968; Pasadeos et al., 1997; Turk & Katz, 1992).

Barban, Cristol, & Kopec (1988) proposed a Media Decision Making Process that sought to encompass the totality of the media planning role and unlock the secrets of the underlying concepts (King, 1988). They wanted to steer advertisers away from 'mediocrity in media', viewing media planning merely as the task of efficiently distributing or allocating advertising dollars. Full briefing from the data within the clients' marketing plan is explicit within the model, which seeks to establish that media planning should be viewed as an important step in the creative process (Barban, Cristol, & Kopec, 1993). In 1992, Dyer, Forman, & Mustafa, (1992) proposed an Analytic Hierarchy Process (AHP) to support media selection, noting that the media planning selection decision poses a dilemma in that its solution must rely on human judgement, but is too complex for human judgement alone (ibid, pp61). This sought to address the issue of combining the heuristics of expert knowledge with algorithmic analysis. By allowing decision makers to model a complex problem in a hierarchical structure.

The arrival of the internet changed the requirements further and heralded the design of numerous siloed algorithm models designed to optimise each medium independently, with a side effect that many practitioners have shied away from conventional quantitative media planning research (Cannon, 2001). Early research sought to replicate the reach and frequency traditions by seeking new metrics that could be used to measure effectiveness using the interaction as the outcome (Leckenby &
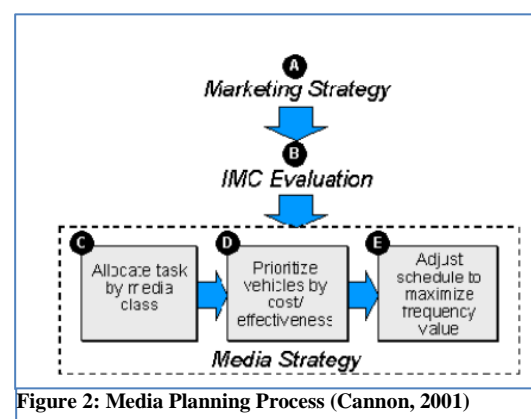

Figure 2: Media Planning Process (Cannon, 2001)

Hong, 1998; Novak & Hoffman, 1997) however, Cannon (2001) showed how all media selection could be addressed through a common evaluation process as outlined in Figure 2, and the adoption of a sequence of process steps including the allocation of the tasks by media class, evaluating the media vehicle efficiency, and progressing through the Frequency Value Planning Process (FVP as outlined in Figure 3, with each step supported by a number of detailed.
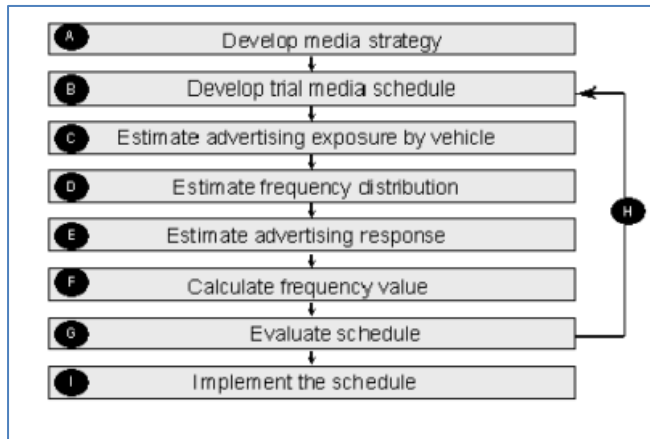

Figure 3: The Frequency Value Planning Process (Cannon, 2001)

In 2007, Barker proposed a simple practitioners media planners process model (Figure 4) to assist with the integration of siloed planning strands and reflect the iterative nature of the planning cycle. Reflecting Barban, et al, (1993) and Cannon (2001), the model was underpinned by solid IMC principles (Jenkinson, 2003; Kitchen, Schultz, Kim, Han, & Li, 2004; Schultz, 2003) but distinguished between the more strategic inter media decision making steps of and the tactical intra media decisions. Briefing, was however implicit, in that the process happened after the media planners had received a full briefing on the clients' marketing plans, as recommended in the IPA's client briefing research (IPA & CAF, 2004).

Such models attempt to clarify the process steps required within the increasing complexity of media planning.

By 2009, a number of research agencies, including Razorfish, hypothesised as to why media-mix modelling was failing. They identified that media-mix modelling had historically treated inputs to the model as independent of each other. However, new media often combines exposure constructs with interactivity metrics, therefore a TV campaign could, for instance, drive traffic to search for the web site, creating not only its own impact, but also a search instance and a web visit - raising the question as to whether the digital impact should be

Figure 4: The Media Planners Process (Barker, 2007)

counted as one of the inputs or whether it was an output? Or both? (Chang & Thorson, 2004; Razorfish, 2009; Sudassy, 2012). Schultz, et al researched the issue of cross-media synergy and concluded that combinations of media can have results that are bigger than the results expected from the individual media alone (Schultz, Block, & Raman, 2009a; Schultz et al., 2009b; Schultz, 2006). They would suggest that such gains, or synergies, are an output, and are not limited to digital media.
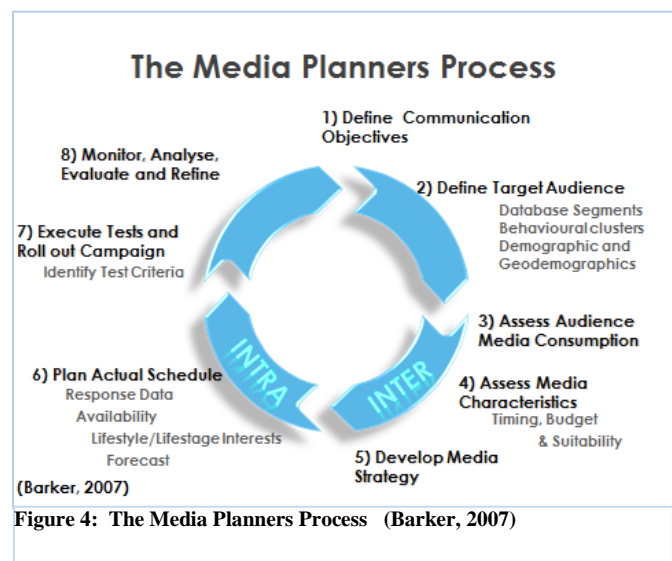
Where media modelling is absent, many contend that new media demands new metrics to measure their efforts and that these tend to follow the direct marketing model, calculating the cost and volume of anticipated responses, or clicks, in relation to a task and budget (Enoch & Johnson, 2010). Enoch & Johnson (2010) go on to highlight however, that to assert that a specific term, such as reach and frequency, cannot be applied in new media situations is a 'logical fallacy' and misses the point that the traditional terms represent as fundamental ways

of looking at human behaviour. These issues of divergence in evaluative measurement and metrics, whether used in the formative or summative stages of planning (Tom, Watson, & Noble, 2014), may account for why many advertisers have shifted budgets from traditional mass media to narrowly targetted and online media being drawn by the opportunities for accountability and measurement (Fulgoni & Lipsman, 2014; Heo & Cho, 2009; Reynar, Philips, & Heumann, 2010), despite being proven to be less effective against a range of brand engagement measures (Meulders & Roozen, 2011).

Good practice argues that taking a holistic view of the audiences' media consumption and researching their 'touchpoints' and likely communication's journey is important, irrespective of whether that is across traditional or digital media. In addition, an understanding of context and issues of media interaction, repetition and synergy should deliver the greatest persuasive effect to reach the desired communication objectives (Egan, 2014; Enoch & Johnson, 2010; Fill, 2013; Jenkinson, 2003, 2007; Pelsmacker, Geuens, & Bergh, 2013; Schultz et al., 2009b; Schultz, 2006) and using the 'holy trinity' of reach, frequency and time spent to capture how we might have access to consumer' attention (Romaniuk, 2012).

Modern media planners are certainly gaining recognition and now often occupy a pivotal position in the advertising process (Katz, 2013; Lane et al., 2010) and the process of selecting media through which to deliver effective communications has become increasingly complicated. Planning is often frustrated by the complex, silo driven intra-media planning environment where channel decisions are often taken in isolation, via unrelated and unconnected media measurement methodologies, and, in many instances, in competition with one another (Assael, 2011; Fulgoni & Lipsman, 2014). However, a key objective for many media planners remains to optimise media effectiveness and cost efficiency, although, as we have seen, there are different measures that constitute effectiveness.

Either way, as identified by Sudassy, (2012), the process of media decision making appears to have moved on again. The function of media planning is about understanding consumer behaviours and needs, and how to craft experiences that deliver on the opportunities presented by those evolving behaviours, which, he believes, is fundamentally different than simply accumulating reach and exposure through mass media.

Aims and Objectives

As a result of this changing environment, this research seeks to explore whether the older media decision process models constructed around media measurement, reach and frequency remain effective for the modern communications planner and to identify what frameworks and metrics are being used to develop and evaluate the media strategy for advertising and marketing campaigns. In summary the objectives are to:

- Explore the existing media decision making processes that are being undertaken by modern media and communications planning practitioners to.

- Identify what evaluative data practitioners use throughout the process to determine the effectiveness of their media strategies.

- To identify a new framework for media planning that provides a holistic approach to planning whether working across traditional or digital media.

Overall Study design

This research seeks to explore and understand the media selection decision making process. The principal research method is to review available literature and collect primary data to shed more light on the research questions. A flexible approach is required and looks to form understanding through the collection of 'opinion' from experts. An exploratory research design is the most appropriate, using a multi-strategy with both qualitative and quantitative elements. Robson (2011) defines this as a 'pragmatic' approach to research, which seeks to identify 'how' and 'why' something maybe happening.

This research will essentially be a cross sectional study, identifying the phenomenon at the particular time of the study (Saunders, Lewis, & Thornhill, 2012) utilising qualitative in-depth interviews with marketing and communications experts to gain their views on the processes that they undertake to develop the media strategy and the measurements and metrics that are used within the process. The research questions include:

- RQ1: How has the media selection decision making process used by media planners to formulate the media strategy evolved to accommodate digital media?

- RQ2: What evaluative measures and metrics are use to guide the decision process for a particular campaign?

- RQ3: What decision making processes do practitioners use to derive their media strategy?

Methods

This study is designed to explore current marketing communication practice from a marketer and media planners' perspective using both secondary research and primary data. Secondary research sources include WARC, Admap, Media Week, Brand Republic, E-consultancy, IAB (Interactive Advertising Bureau), ITV, RAB (Radio Advertising Bureau), thinkbox (the marketing body for commercial TV in the UK), and other sources related to the various institutes and publications supported by marketing and media practitioners. The primary research will explore the subjective experience of individuals across a number of cohorts to ensure that the key differences in roles and responsibility were accommodated:

- Founders & principals who undertake media planning within specialist digital & social media agencies and senior advertising agency communication planners amongst UK's agency groups

- Senior marketing managers and directors within UK organisations with responsibility for advertising and promotions.

- Senior directors / managers within media owners and organisations who develop media modelling software, such as Experian.

The sampling technique is essentially non-probabilistic, requiring purposive sampling, or judgement, to identify the required experts and then the convenience of the individual being available for the in-depth interview (Saunders et al., 2012). Saunders advises that sample size is likely to differ between research strategies and to be dependent upon the nature of the population from which the sample is selected, but guided by the principle of saturation. This is a heterogeneous sample, consequently an initial sample of 15 interviews will be targetted (Symon & Cassell, 2012, pp 45). Interviews are likely to last between 45 and 60 minutes, will be conducted in the respondent's office or other venue that is convenient to them, and will be recorded with the approval of the respondent. Interviews will be constructed on a semi-structured basis enabling data to be categorised and analysed using six phase thematic analysis (Braun & Clarke, 2006, pp87), identifying key similarities and differences within the survey data and triangulated against current secondary sources.

The reliability of the research will be underpinned through the sample frame. This sample frame will include only principles, founders or those designated with Director or Manager in their title to ensure that they reflected a genuine level of responsibility and knowledge within the area. The intention is to build a 'typical case' that will be indicative of behaviour, and will seek to not just understand what and how, but also why. The interviews will be conducted, where possible, face to face. The advantage of this is that the conversation can flow naturally and have the opportunity to enquire and confirm issues where respondents use jargon or unfamiliar terms. The disadvantage is that they will be more time consuming and more costly than say telephone or email interviews (Saunders et al., 2012). However, telephone interviews are not seen as being optimal for this study due to the length of time that it is thought to need. In addition, the lack of visual cues could be a handicap. By contrast, emails would be the most time and cost efficient, with the ability to conduct them

concurrently, but again they would limit the potential information flow and the level of detail that could be gathered (Hunt & McHale, 2007, as cited by Robson, 2011).

Current study

A pilot study was undertaken and included in-depth interviews with five media planning practitioners, three agency based and two client based. The interviews were recorded and transcribed via NVivo (QDATraining, 2014) and thematic analysis was undertaken (Braun & Clarke, 2006). Through the coding approach (Ashwin & Hirst, 2007; Boyatzis, 1998) the thematic analysis was driven by the researcher's analytical interest towards the research question in the light of the literature. The objective was to identify whether the media selection decision making process as outlined by Barker (2007) remains true in today's planning environment and what metrics and measures are used to determine the effectiveness of the media strategies that are recommended. The interviewer asked respondents to describe the processes that they follow to determine their media strategy and to detail the data that they use at the various stages. Interview guides that included diagrams to assist respondents to summarise their current media selection decision making process, as outlined in Figure 5.
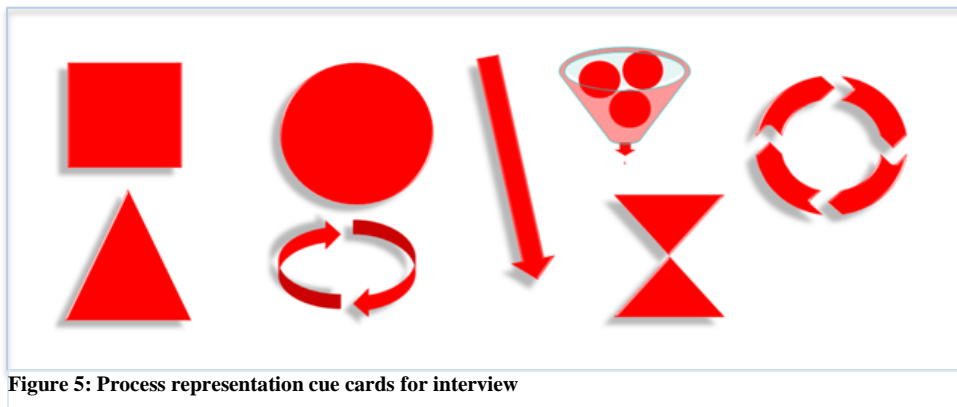

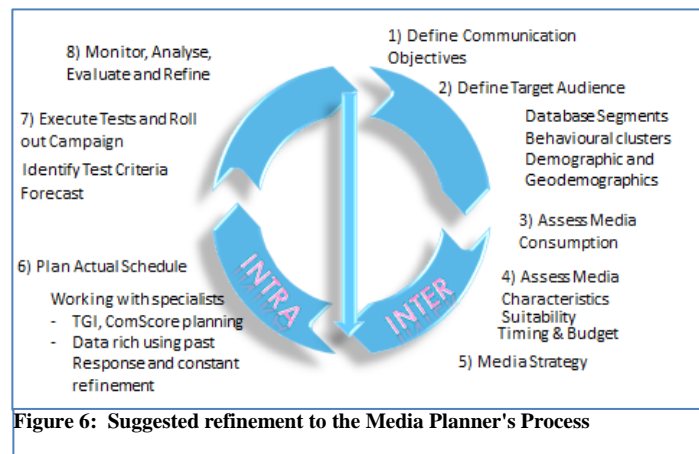**Figure 5: Process representation cue cards for interview**

Initial findings

Across the pilot the descriptions of media selection decision processes remained generally consistent with the stages identified by Barker, (2007) including briefing, evaluation of the target audience and their media consumption before embarking on media decisions. However there was divergence as to the amount and type of data that was provided for the initial briefing, with some respondents being immersed in the marketing background and others identifying generally more prescriptive implementational details. In the latter there was also an expression of regret at the limited information received, and respondents discussed how useful they would find it to have more background and insight into the target consumers and results from historic campaigns. This reflects the divergence in the literature relating to media planning being perceived by some as merely a reach and frequency exercise and by others as being deeply immersed within the consumer behaviour and marketing objectives.
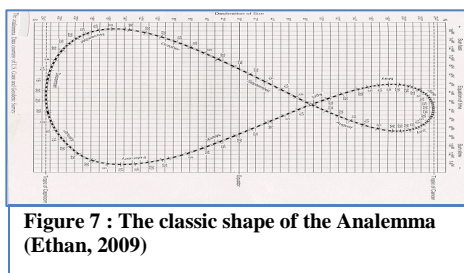
In relation to the processes used, respondents were asked to review the cue cards and deliberate as to which shape best represented the process that they go through to develop media strategy and execute the tactical plan. One or two discussed the appropriateness of the progressive nature of a linear approach, as proposed by Cannon (2001) or the concept of a funnel, with lots of information being filtered down. However, all elected for a circular process, fuelled by ongoing arrows, to represent the importance of feeding back summative evaluation data into the formative phase of the next round of activity.

Respondents were then asked to comment on the suggested media planners' process. Two respondents, both agency directors, offered additions or alterations to the current model. Firstly, one respondent suggested that evaluation was conducted at least weekly within their unit, and the results from past interactions feed directly back into the next weeks activity.

However, they felt that the overarching client objectives and underpinning audience segmentation might only be reviewed quarterly or bi-annually. It was suggested that the process have a shortcut arrow, as detailed in Figure 6, to link evaluation back into the tactical phase and underpin the rapid and iterative nature of managing campaigns today, with phrases such as '*Data rich and using past response and constant refinement'*.

Figure 6: Suggested refinement to the Media Planner's Process

A second respondent suggested that the initial analysis and summative evaluation stage needed to be given more emphasis. This was drawn out as the earths Analemma as detailed in

Figure 7 : The classic shape of the Analemma (Ethan, 2009)

Figure 7, or a slightly resized figure of eight, as per the Virgin Media logo, with the commentary that the consumer and marketing insights were a huge part of the work these days and that, only having evaluated these, could the audience segments and communication objectives be established. Following this, the campaign strategy would follow round to implementation and delivery with evaluative metrics being used to inform the next round of activity. However, echoing other respondents, they felt that the extensive insights review might not be undertaken on every occasion, perhaps just at the beginning of the annual planning phase, rather than for each tactical campaign throughout the year.

Conclusions

Whilst the process representations were different from the various respondents, there are some similarities to be seen in the idea that any proposed new model might need to be flexible enough to represent the variations in weighting placed on different stages of the planning cycle. There appears to be at least two levels of process that are proposed, firstly that undertaken for the significant annual planning review in tandem with the development of the annual marketing plan. Secondly, the tactical replanning that is undertaken throughout the year incorporating and responding to the metrics and measurements that are captured. This would indeed suggest that the current sequential models need to be revised to incorporate more of the iterative approach that is being applied. In addition more supporting data should be supplied to detail some of the evaluative detail that is undertaken at each step to enhance the usefulness of the framework.

Next steps

Following on from the pilot, the interview guide has been amended to focus more on media selection decision making process and metrics, removing some of the duplication that made the initial interviews a little awkward. The initial findings validate the iterative nature of the proposed model, but needs to reflect the re-weighting of the process due to the growing supply and use of consumer insight data which appears to play a greater role in the development of the media strategy than it used to. Along with it comes changes in the approach to targetting and measuring media selection effectiveness. The roll out interviews will seek to explore these in much greater detail and will include the media owners and software systems companies to understand their view of the process and the underlying premise to the software solutions that they provide.

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