

Media Planning: Evaluating the distance between theory and practice

Abstract

Media planning should be orientated towards optimising effectiveness; however, the digitisation of media channels, proliferation of media vehicles and fragmentation of target audiences has complicated the process of selecting media through which to deliver marketing communications. It has reinforced the complex, silo driven, intra-media planning environment, with channel decisions being taken in isolation via unrelated and unconnected media measurement, often polarised between 'attitudinal' and 'behavioural' paradigms which view 'effectiveness' differently.

The researcher's work builds on that of Bulearca & Bulearca (2009) who suggested there is a need to identify 'patterns of right decisions for various situations to ease the work of media planners'. A framework is sought, via sequential exploratory research, encompassing literature, in-depth interviews and data analysis, to understand the media planning processes.

The initial study indicates extensive use of a range of 'operational' metrics, but less evidence of 'evaluative' metrics, despite an expressed desire to have these. It suggests that siloed, role focused structures prevail, preventing the flow of information within organisations, and that aims to embrace IMC are frustrated by unmet information needs. It provides strong evidence that new research is needed to address the recent developments in media planning and for the continuation of this research.

Media Planning: Evaluating the distance between theory and practice

Introduction

This research is focused on media and campaign planning – a specialist subset within marketing communications based around the selection of communication platforms used to transfer the organisations' marketing messaging to their desired audience. It is an important area of research because multiple millions of pounds are spent annually on advertising and promotional campaigns to persuade and engage; driving participation, facilitation, and conversation to build relationships (IPA, 2014). However, the on-going digitization of media channels, proliferation of media vehicles and increase in customer touch points has driven a dramatic fragmentation of target audiences, and continues to complicate media planning, the process of setting the media strategy and selecting the media channels through which to deliver effective communications (Krajicek, 2013; Sasser, Koslow, & Riordan, 2007; Soberman, 2005). It has reinforced the complex, silo driven, intra-media planning environment (Assael, 2011) with channel decisions being taken in isolation, often via unrelated and unconnected media measurement (Schultz, 2006). Marshall (2011, p2) adds that, in addition to being a far more complex environment, the definition of a media channel has expanded to such a degree that the industry has created a number of new categories, and now talks about media in terms of 'bought, owned and earned media'¹, all of which the media planner may be responsible for. Yet a review of the literature indicates there is little related to the issues facing media planners in this digital environment.

Background

A number of older models placed media planning and the setting of the media strategy at the culmination of a communications planning process, 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 et al. 1999). In these cases, the planning is described as being primarily a cost and reach focused exercise, identifying the building blocks by vehicle for a media schedule. However, as Cowan & Abratt (1999) recognised, with the increased complexity of media planning, it is important to include media planners in the strategic planning team. A theme echoed by Collin (2003) who noted the blurring of lines between account planning and media planning, identifying that media planners not only have the best insight into consumers product and media usage, but also the ability to plan within financial frameworks such as an ROI model. This enables media planners to establish measurement and key performance indicators (KPI's) at the beginning of the process (Collin, 2003; Woodward, 2011). As Bulearca & Bulearca, (2009, p106) noted, with the on-going digitisation of media channels, proliferation of media vehicles and audience fragmentation, the role of media planners is changing.

There has been a structural change within the industry too, with media departments being separated from their full service advertising agencies to build global media networks. Sasser et al., (2007) highlighted the increasing degree of separation and identified a number of negative effects on the degree of creativity and the breadth of 'palette' considered in the planning solutions. They suggested that creativity and exploration into new media relied upon a number of factors, including internal structures employed to reduce silo mentality, size and diversity of agency expertise. To aid media planning there is a stream of research looking at media planning techniques and evaluating which media channel, or combination of channels, is the most effective for the required communication.

At the outset, numerous authors agree that adopting an integrated marketing communications perspective and including all parties in the briefing of marketing planning information is important (Chaffey & Smith, 2013; De Pelsmacker, Geuens, & Anckaert, 2002; Egan, 2007; Fill, 2013; Schultz & Kitchen, 1997). Good practice argues that taking a holistic view of the audiences' media consumption and researching their 'touchpoints' and likely

¹ 'bought, owned and earned media': *Bought*: the media space you can buy. *Owned*: the communication options you own, from websites and social media pages, through to vehicles and shop windows. *Earned*: the comments and posts that you stimulate or 'earn' through your interactions with customers and commentators. This later area may be positive or negative and is not a controlled message (Marshall, 2011)

communication's journey is a further important building block (Jenkinson, 2007a, 2007b; Nelson-Field & Riebe, 2011; Schultz, 2003). In addition, a solid understanding of context and issues around media interaction, repetition, and synergy (Schultz, 2006) will help to deliver the greatest persuasive effect and reach the desired communication objectives. To support this a number of studies have sought to measure perceptions of channel effectiveness against a range of attitudinal measures, such as engagement, persuasion or brand experience. Meulders & Roozen (2011) found that traditional media channels, such as television, were more effective than non-traditional media channels, (e.g. the web), as a touch-point against a range of measures relating to attitude (cognitive, emotional and conative) and awareness (recall and recognition) and at getting viewers' attention (Nagar, 2009). Danaher & Rossiter (2011) also found that the traditional channels of television, radio, newspapers and direct mail retain their historically favoured attributes of trust and reliability of information, even amongst "tech savvy" younger consumers.

Others have looked to understand how best to combine media channels to optimise effectiveness (Chang & Thorson, 2004; Kanso & Nelson, 2004) and postulate various conditions for optimising media synergy and simultaneous media usage (Dijkstra, Buijtsels, & van Raaij, 2005; Naik & Raman, 2003; Pilotta, Schultz, Drenik, & Rist, 2004; Schultz, Block, & Raman, 2009a, 2009b; Schultz, 2006). Chaffey & Smith (2013) outlined a more sequential process, reflecting the 'customer journey' and 'purchase funnel', around which planning should be orientated, with clear accountable and measurable KPIs marking effectiveness at various stages, such as volumes of search, frequency of engagement, conversion to purchase or value of repurchase, thus emphasising the behavioural response approach.

A key objective for media planners remains to optimise media effectiveness and cost efficiency, but there is now a huge variety of methods for measuring data and a plethora of optimisation models and systems through which to determine the media plans (Cowan & Abratt, 1999; Iyer, Soberman, & Villas-Boas, 2005; Soberman, 2005). Traditional media is often planned in terms of 'cost per thousand' impressions (CPT's), reach, frequency and rating points (GRP's). Digital media on the other hand tends to follow direct marketing models, calculating the cost and volume of anticipated responses in relation to a task and budget (Assael, 2011; Nelson-Field & Riebe, 2011) with purchases being negotiated around cost per action, cost per lead, cost per click or cost per sale parameters, leading to greater perceived efficiencies through payment by results.

Many advertisers have shifted budgets from traditional mass media to narrowly targeted (Heo & Cho, 2009) and online media (Edelman, 2007) lured by the opportunities for such accountability and measurement, despite being proven to be less effective against a range of brand engagement measures (Meulders & Roozen, 2011). Nevertheless, as Jenkinson (2007) points out, evaluation is often polarised between attitudinal and behavioural paradigms, which view effectiveness differently, and as a result, there are numerous variations in results and in asserting what constitutes 'effectiveness'.

However, Wertime & Fenwick, (2011) highlight that new digital media plans cannot stand alone and need to integrate direct response and activation planning, not just awareness, to reflect the connection of media across devices, physical location and time of day in a way that has not been done before. They also note the continued blurring of 'media' and 'creative', as media planners seed materials into the market for consumers to pass on virally. This change in planning is echoed by Pringle & Marshall, (2011) who state that technology, and specifically the internet, has resulted in a subtle, but increasingly significant, shift of emphasis in media planning. They summarise that media planning has been about the development of plans to maximise the delivery against a core target audience via selected media. The new role, they assert, requires much more precision in defining the target and identifying where that audience can be most effectively reached, across various media and within segments of an individual media. They suggest four important guidelines to support this, as outline in Table 1. As a result modern media planners are gaining recognition and importance, and often occupy a pivotal position in the advertising process (Katz, 2010; Lane, King, & Reichert, 2010).

Table 1 Media Planning Guidelines (Pringle & Marshall, 2011)

1. To reach and engage with potential consumers it is increasingly necessary to adopt a multi-media approach, utilising a combination of media that reflect their customers' behaviour and preferences.
2. That effective communications leverage all these opportunities, and most successfully in combination, i.e. the combination of 'bought, owned and earned' media.
3. More precision in defining the target, and where that audience can be most effectively reached; be it across the various media or within segments of an individual media.
4. Developing new value models is now a fundamental part of the media strategy and planning process

However Bulearca & Bulearca (2009, p115) suggest that although there are some useful frameworks that can act as a starting point, *'there is a need for a more complete and accurate picture which could identify patterns of right decisions for various situations which could possibly ease the future work of media planners'*.

Current study

The researcher's work builds on that of Bulearca & Bulearca (2009) with the aim of developing such a constructive framework for media planners through an in-depth evaluation of the processes being undertaken by marketing practitioners and their media planners for the setting of the media strategy, and the measurement and evaluation of media channels used for marketing communications activity. A sequential exploratory research design has been adopted, using a multi-strategy, incorporating both qualitative and quantitative elements (Robson, 2011, p165). The principal inquiry is to review the available literature, specifically in and around communications planning, and from other fields such as process management, to compare the determination, delivery and measurement of effectiveness. Primary research seeks to provide new insight through qualitative, semi-structured interviews and interpretation of the subjective opinion of senior marketing and communications experts. Three cohorts are identified to ensure that the key differences in roles and responsibility are accommodated:

- Founders & principals who undertake media planning within specialist digital & social media agencies
- Senior advertising agency communication planners within UK's agency groups
- Senior marketers who are responsible for their organisations marketing communications

In addition, documentary and statistical analysis of award winning marketing communications campaigns will be undertaken via the IPA Effectiveness Awards database. As a result, this research aims to add to the body of research on marketing communications and media/channel strategy, and will seek to:

- Identify how practitioners define media/channel effectiveness and what prospective measures and metrics are suggested?
- Assess how practitioners perceive and measure media effectiveness?
- Develop a media-planning framework that encompasses the needs of the digital environment.

Subsequently, quantitative research will seek to evaluate whether any of the suggested measures associated with successful marketing communications, as identified through the previous elements, reveal any differences in media effectiveness between audience segments; in particular, between 'digital natives' and 'digital immigrants' (Palfrey & Gasser, 2008)

Initial Benchmarking Study

To commence the primary research an initial benchmarking study was undertaken to understand the broad information needs of modern media planners. This built upon the work of Cowan & Abratt, (1999) however, unlike the previous study, it did not seek to ask respondents to prioritise the planning information. A pilot involved interviewing three media planners individually to identify *'What information do you use to develop a media plan?'* Even on a small sample size, this confirmed that the information needs varied dramatically. In addition,

an interesting discussion arose, in that the information needs were not always met, therefore a second question was proposed: *‘What information would you like to have?’*

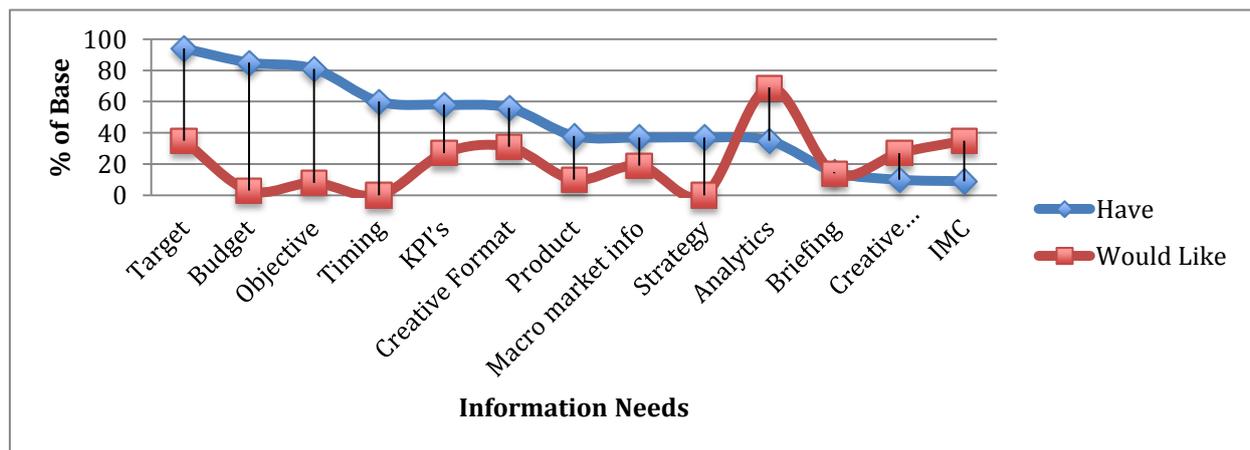
A larger scale study was undertaken via a survey tool comprising just the two core questions and enabling respondents to enter their answers verbatim - see Appendix 1. This method was selected in preference to a closed list of criteria to limit the potential of suggesting solutions/information sources to the respondents. Respondent identification also was kept to a minimum to encourage participation, requesting only clarity on whether they were agency or client side and their level of responsibility.

The survey was distributed using non-probabilistic convenience sampling and then ‘snowballed’ across fellow professionals. Seeding was undertaken via selection of 133 relevant contacts from the researcher’s network database, all of who work within client, agency or supplier side roles. Seventy-eight useable responses were completed over the initial six-week survey period (18/11-29/12/14). Of these, the majority (59%) described themselves as media planners, 18% as media directors and 23% as marketing managers - no marketing directors had completed the questionnaire by the time of writing. Theme matching techniques were used to align common information noted by respondents with the categories reflected those used by Cowan & Abratt (1999) to enable comparison. If ambiguous, statements were left as independent points, however this does result in them having very low incidence. It was felt to be valuable to gain unprompted insight at this stage although this may be a source of data error due to omissions in recall, assumptions about what might be ‘obvious’ and not needed (such as ‘a brief’), variations in terminology and the researcher’s assumptions when theme matching. Common clusters were aggregated under relevant themes, with the total mentions being indexed against 100, where 100 equates to all respondents having mentioned that type of information. The results were tabulated for ease of comparison and detailed in Appendix 2.

Initial findings

Figure 1 below represents the top-level data from the respondents. Virtually all respondents listed target audience (described variously as *‘target persona’*, *‘demographics’* and *‘segments’*) together with budgets and objectives. Timing was also cited frequently (including *date*, *timeframe*, *length of campaign and period*). KPI’s were identified by 58% of the base (using terms such as *KPI’s*, *sales targets*, *success metrics*, *ROI*, *conversion rates* & *CPA’s*).

Figure 1: Identification of Media Planning Information Needs



Similarly, 56% mentioned creative formats, incorporating *‘assets’*, *‘preferred platforms’* & *‘commercial lengths’*. In addition, a high number of senior media respondents outlined media *‘strategy’* and elements relating to *media channel mix*. However, only 35% mentioned anything to do with *‘analytics’*, *‘web stats’* or *‘results from previous campaigns’* and even less outlined using details relating to strategic marketing planning, such as *product information*, *company background*, *brand guidelines*, *competitive activity* or *macro market information*, details that should all be available via the marketing plan. However when comparing roles, it can be seen that marketing managers use this data more than their agency counterparts, reflecting Cowan & Abratt (1999) findings.

In contrast, the list of information that respondents would like to receive, (as outlined in Appendix 2), indicates a wide desire to receive related analytics information (including *'results', 'metrics' and 'response data from previous campaigns', 'tracking results', 'channel performance', 'Google Analytics', 'econometric models' and 'key conversion data'*). The next category request is IMC orientated information, such as what *'other agencies are planning', 'what the client is doing', 'social', 'email', 'PR' or 'other schedules'* and *'overarching business strategy'*. Targets and KPI's are also mentioned, with planners wanting *'customer data', 'audience data', 'demographics', 'audience insight', 'geography', 'regionality', and 'purchase data'*, along with *'comms KPI's' & 'ROI'*.

Looking at the sub-segments, senior media professionals expressed a desire to get a broader picture, wishing for details of *'marketing messages', 'creative messages', 'what creative is?' and 'potential for innovation'*, echoing Sasser et al., (2007). In addition, some interesting nuances were collected including *'what the client really likes?'* and similarly, *'what the budget really is?'* Amongst the marketing manager, 22% listed *'benchmarks' and 'success metrics'* amongst the data they would like, and surprisingly some listing *'market information' and 'market size'*. The strategy points noted in the first data set were not present in the second; indicating perhaps that many consider strategy to be an output rather than an input. Variances such as these need to be investigated further.

Conclusion

This first stage research reveals through the literature that media planning has changed over the last decade, driven in part by the increasingly complex media environment but also through the adoption of some of the account planning and insight roles as a result of the investment in research and technology. There remains a desire to bring greater precision and accountability to planning decision making, however this initial benchmarking study would suggest that the information flow is not harmonised sufficiently to deliver this. Theory suggests that a full briefing should include all aspects of the marketing plan, which itself should be built around a detailed analysis of internal, micro and macro environments (Chaffey & Smith, 2013). The results indicate a lack of information sharing particularly in the following areas:

- Customer data and product insights associated with detailed purchase focused targeting,
- Details of creative messaging, relating to both their immediate plans and the clients wider activity, and,
- Relevant historic metrics/analytics data, where many respondents lamented the fact that they wished to get hold of results from on-going activity and previous campaigns.

Cowan & Abratt, (1999) note that information is viewed differently in different roles but this snapshot suggests that the problem is not an issue of priority but, in many cases, an unmet information need. It would suggest that media planners have, and use, what might be called *'operational' metrics* to plan with, but do not use many *'evaluative' metrics*, although they would like to have this data. This would indicate that the information exists but that a siloed working environment (Sasser et al., 2007) perhaps prevents the flow of information.

The practical implications for this work are for agencies and clients alike to review their knowledge management processes and how information is transferred. It suggests a need to review briefing procedures both externally and internally. Organisational structures may also be an issue here, as it may be that bottlenecks and procedures are preventing the free flow of information within an organisation. The wide range of metrics described confirms the view that unrelated measurement systems are being used by different parties and reinforces the question of how are people comparing the efficacy of various media, whether old or new, bought, owned or earned? This initial research supports the work of Bulearca & Bulearca (2009) and provides evidence that further research is needed to address these and other issues created by the developments presented by the digital environment and will underpin the second stage of more probing and insightful research.

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Appendix 1: Questionnaire

Media Planning Information Needs

Welcome	
<p>This survey asks about your experiences as a media and communications planner to ascertain what information you use to formulate and develop your plans and what information you would like to have but do not usually get access to.</p> <p>This survey is a short initial piece in my PhD research, through which I am investigating how media effectiveness is being determined in the digital environment. There are only a few questions but your responses will be very helpful in answering some of my initial questions. The questionnaire should take around five minutes to complete. Please note that it is not possible to return to a page once it has been completed. When you arrive at the final 'thank you' page, you will know that your responses have been recorded on the database. Once you click 'continue', you will be directed to the first section of the survey.</p> <p>Data Protection: All data collected in this survey will be held securely. Results are confidential and all efforts have been taken within the survey to ensure that no individuals can be identified, even by implication. All results will be reported in an aggregated and anonymised form.</p> <p>Many thanks for your participation, Beverly Barker FIDM, FHEA, MSc, PGCHE email: barkerba@lsbu.ac.uk</p>	
Section 1	
<p>A little about you</p> <p>In this section you will find some very simple profiling data that will help to analyse the data collected</p> <p>1. Please indicate which of the following most closely describes your current role and experience</p>	
<p>Select an answer ...</p> <p>If you selected Other, please specify:</p> <input type="text"/>	<p>Choices offered:</p> <p>Marketing Director</p> <p>Marketing Manager</p> <p>Media Agency Board Director</p> <p>Media Director</p> <p>Media Manager</p> <p>Media Planner</p> <p>Other</p>
Section 2	
<p>2. Please list the data and information types that you are given and have access to use for the development of your media plans.</p>	
	<p>More info</p> <p>This information should only include the data that you do have access to - not what you wish you had access to :-)</p>
Section 3	
<p>3. Please list the data and information types that you would like to have access to for the development of your media plans.</p>	
	<p>More info</p> <p>This should include information or data that you feel would improve your ability to plan effectively, whether that be more creatively or efficiently, that you know exists and that could be shared with you but is not. So please list your frustrations! <i>If you are feeling creative and there is information that is just</i></p>

	<i>not available but would be of great benefit to all, please put in brackets.</i>
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Section 4

Thank you for taking the time to complete this little survey. The results will be reviewed and formulated into an initial paper for my PhD. Please let me know if you would like a copy of the findings.

Moving forward...I am looking at how people define effectiveness and what metrics & measures they use to plan, evaluate and measure their campaigns against these definitions. I would like to contact you again to discuss in more depth your thoughts and practice around the information you use, and the decisions you take, in relation to media planning. The interview will take between 45-60minutes.

If you would be interested in participating in an interview with me, **please email me at barkerba@lsbu.ac.uk** and I will forward you more information.

Many thanks, Beverly Barker

Appendix 2: Results summary

Figure 1: Information sources used to develop media plans by incidents of mention (All Respondent base: 78=100)

Information Category	Media Director	Media Planner	Total Media	Marketing Manager	All Respondents
% of Base	18	59	77	23	100
Target	93	91	92	100	94
Budget	100	78	83	89	85
Objective	64	85	80	83	81
Timing	100	57	67	39	60
KPI's	64	54	57	61	58
Creative Format	86	61	67	22	56
Product	21	24	23	89	38
Macro market info	29	33	32	56	37
Strategy	71	30	40	28	37
Analytics	0	41	32	44	35
Briefing	0	15	12	28	15
Creative messaging	0	4	3	33	10
IMC	7	7	7	17	9
Total	100	100	100	100	100

Figure 2 Information sources respondents would like to have to develop media plans, by incidents of mention (All Respondent base: 78=100)

Information Category	Media Director	Media Planner	Total Media	Marketing Manager	All Respondents
% of Base	18	59	77	23	100
Analytics	64	63	63	89	69
Target	29	43	40	17	35
IMC	64	26	35	33	35
Creative Format	50	28	33	22	31
Creative messaging	50	24	30	17	27
KPI's	7	35	28	22	27
Macro market info	14	15	15	33	19
Briefing	7	20	17	6	14
Product	7	9	8	17	10
Objective	7	9	8	6	8
Budget	0	2	2	6	3
Timing	0	0	0	0	0
Strategy	0	0	0	0	0
Total	100.0	100.0	100.0	100.0	100.0