

**Advertising Media Strategy and Planning:
Exploration of the strategy making approaches
undertaken in the digital environment**

**by
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by Beverly Barker

Abstract

The aim of this thesis is to explore the practices being used to guide advertising media strategy and planning and identify if new approaches are emerging in the increasingly digitally orientated environment.

Exploration of the literature identifies that the profession has changed significantly over the last three decades, with the role of media planners being elevated from that of an implementational scheduler to a more strategic role within the communication planning team. The literature also highlights a number of models designed to guide the media planning process. These indicate practitioners employ a classical deductive planning approach to evaluate, identify and propose the optimal media selection. Reflecting the newer strategic role, more recent frameworks identify a two-stage process where the development of a media strategy precedes implementation and optimisation, but this is still represented as a deductive process. Further exploration of the strategic management literature identifies how strategy making approaches in general have responded to the conditions of turbulence and uncertainty driven by the digital environment and indicated that this deductive approach might not be appropriate, leading to the hypothesis that the media strategy making approaches described through the literature do not reflect current practice.

To explore this, primary research was undertaken, consisting of two concurrent studies. For study 1, fifteen in-depth interviews were conducted with senior UK media practitioners exploring current approaches to media strategy making. Study 2 complemented this with a content analysis of data collected from 93 practitioners to identify what information and data sources are used or required.

The study identifies that the media strategy and planning approach has changed to become more emergent and iterative. This corroborates similar findings within strategic management literature. It also identifies that the role of media planners has been elevated further still, to be viewed as a business partner with the client.

The culmination of this study results in the formation of a revised media planning process framework that makes the emergent and iterative approach more explicit, together with an accompanying 'briefing checklist' of the information that should be shared between clients and their agency strategists if the strategy and plan are to be effective.

Keywords

Media Planning; Media Strategy; Media Strategy Process Framework; Client-Agency Briefing; Advertising Campaign Briefing Checklist; Campaign Planning; Media Strategy Decision Making; Identification of Strategy Making Approaches; Strategy Making for Digital Marketers; Strategy Making for Digital Marketers; Strategy Making for Digital Campaign Planners

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Acknowledgements

The research aims to develop a framework that details current practice, thereby adding to the academic discussion around this subject and providing a guide to practice for those studying and entering the profession.

The motivation for this study is the fact that, having spent 20+ years working as Media Director I developed a media planning framework in 2007 to support in-company training of new graduate recruits and the teaching of media planning to delegates on the IDM (Institute of Data and Marketing). However, this and other models that were produced by fellow practitioners and academics now appear dated and do not appear to reflect the processes that are generally observed in this increasingly digitally oriented industry.

I wish to express my sincere appreciation to everyone who helped me with this study, including the many practitioners who gave up their valuable time to meet with me, and of course, all of my colleagues who encouraged me to start, and to complete the processes, in particular, Dr John Scriven, my original Director of Studies at London South Bank University, to whom I dedicate this work.

Finally, I wish to particularly thank my family who have supported me throughout this.

Chapter 1: Introduction to Project

This study focuses on the process of strategy formation in the context of media planning, a specialist profession within advertising and promotional industries. The research explores the approaches being used by media planning professionals to develop the media strategy and identifies the theories, factors and data that influence their decision making.

The research aims to develop a framework that details current practice, thereby adding to the academic discussion around this subject and providing a guide to practice for those studying and entering the profession.

The motivation for this study is the fact that, having spent 20+ years working as Media Director, I developed a media planning framework in 2007 to support in-company training of new graduate recruits and the teaching of media planning to delegates on the IDM (Institute of Data and Marketing). However, this, and other models that were produced by fellow practitioners and academics now appear dated and, as noted in the work of Kerr *et al* (2015), do not appear to reflect the processes that are generally observed in this increasingly digitally oriented industry.

To support this, the thesis explores the existing theories, concepts and processes used within the field of advertising media planning and marketing communication. In addition, this subject-specific literature is integrated with key theories from the fields of strategic management and organisational behaviour. This provides the basis for the theoretical interpretation of both the formulation and implementation of strategies and identifies how strategy making approaches in general have responded to the conditions of turbulence and organisational uncertainty driven by the increasingly digital environment (Faulkner 2002, Young 2014, Stacey and Mowles 2016).

This chapter provides the context and supporting rationale for this study through an introduction to media planning and media strategy making, together with a discussion of some of the many issues and challenges that the profession is facing. The chapter also summarises the main aims, research questions and research methods used, together with an overview of the structure of the thesis.

1.1: Background

This study focuses on the process of strategy formation within the context of media planning, a specialist profession providing various media services within the advertising and promotional industries.

Broadly speaking there are two distinct functions within media services, namely media planning and media buying. Within this relationship, the Media Planner is responsible for developing the 'media strategy' for the promotional activity, identifying which communication platforms and channels should be selected and how those various channels should be used and integrated. The media strategy aims to ensure that the promotional messages reach the targeted audience most effectively so that they can be encouraged to offer the required attitudinal or behavioural response (Jenkinson 2003, Soberman 2005,

Regan 2014, Katz 2019). It is essentially concerned with outcomes, and the creation of connections and influence, rather than outputs (Young 2014, p. 34).

The media strategy is so central to the media planning proposition that it features on the 'What we do' of leading media agencies such as GroupM, part of the WPP group, who, with over UK \$63 billion in annual media spend, are home to three of the top five global media agencies (see Figure 1.1 below). Complementing this is the role of media buying, where specialist Media Buyers focus on the implementational processes of media investment, negotiating and scheduling the activity, and juggling with issues such as the availability and price of the selected media. Both of these roles are supported further with a wealth of data science and technology.

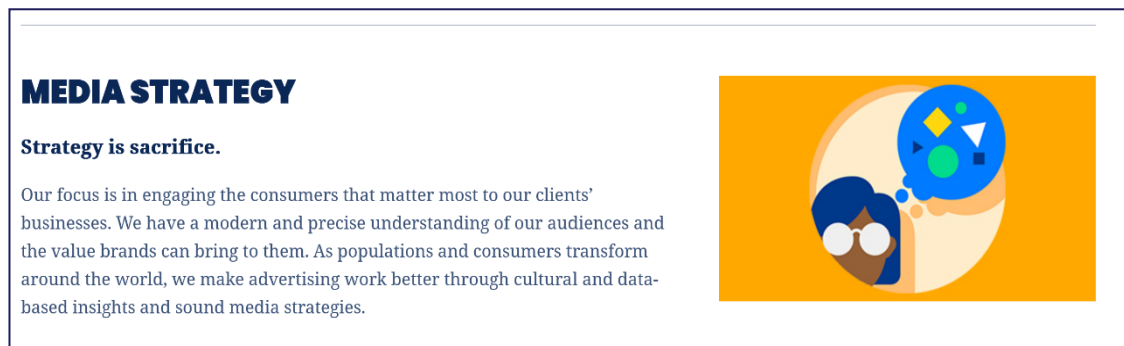


Figure 1-1: GroupM Media Strategy offering (GroupM, 2020)

Alternative terminologies are used for the media planning function, such as the 'media selection process', 'channel planning', 'engagement planning' or 'context planning', all of which connote the process of identifying and integrating the right mix of media to achieve the communication objectives (Crawshaw 2004, Foley *et al.* 2005, Young 2014). Building on this, many organisations now use titles such as 'Head of Communications Planning' and 'Chief Strategy Officer' to underpin the importance and strategic nature of this decision making role but also make explicit the shift from media scheduling to communication planning (Young 2014, Davis 2018). However, to avoid any confusion, the terms media strategy and planning will be used where possible throughout this thesis to describe the role and function under discussion.

The media planning function is often undertaken by a media agency, wherein specialists, such as those within GroupM, can develop their craft, bringing together a wealth of expertise and economies of scale. There is also a range of smaller independent advertising agencies that support a full-service offering, delivering both creative and media services. In addition, an increasing number of client companies are bringing media planning and buying in-house, particularly in respect to digital media options which are more easily accessed due to programmatic buying systems and ownership of their websites and social channels.

This is an important area of research because multiple billions of pounds are spent annually on advertising and promotional campaigns to persuade and engage; driving participation, facilitation, and conversation to build relationships (IPA 2014). The AA/WARC Expenditure Report estimated that £21.5bn would be spent on advertising placement in 2020 in the UK alone, with global advertising spend set to reach US \$563bn. This represents an

estimated fall of 14% year on year in the UK and 8.1% globally due to the Covid-19 pandemic as indicated in Figure 1.2 (WARC Data 2020).

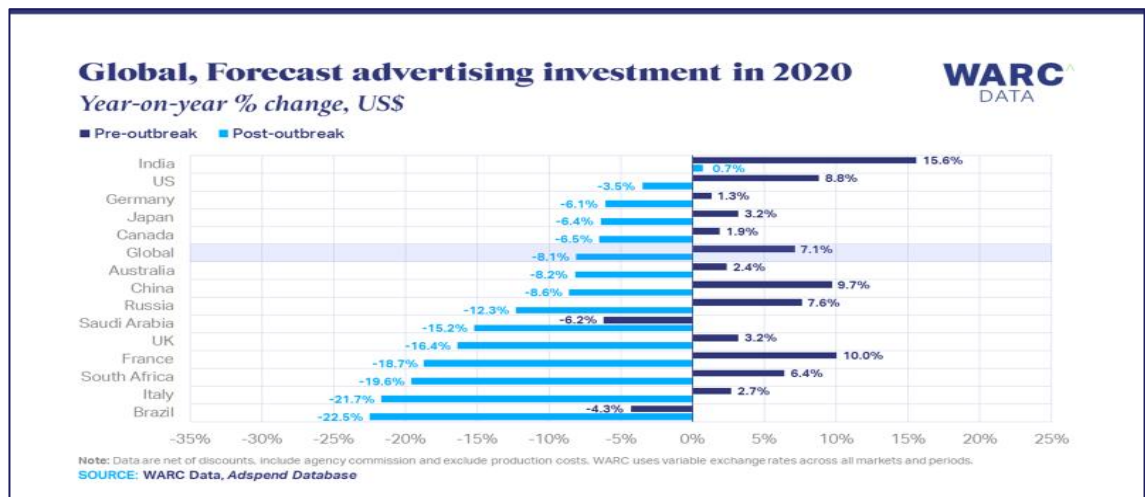


Figure 1-2: Global Advertising investment (WARC Data, 2020)

In relation to the frameworks and processes undertaken by media planning, there is a wealth of literature that seeks to outline how the processes and decisions could be undertaken dating back to the early 1950s when some of the first discussions around media selection and optimisation took place (Calantone and de Brentani-Todorovic 1981, Turk and Katz 1992, Pasadeos *et al.* 1997, Carlin 2005, Assael 2011, Cheong and Kim 2012). Over this time, researchers have sought to investigate both the micro and macro aspects of media planning. This includes researching how the advertising media function has been performed, what media selection models could be or are being used, and issues around media measurement. At a macro level, researchers regularly study aspects such as the role of advertising media in society (Cheong and Kim 2012). However, over the last decade, there has been a noticeable decrease in the work dedicated to the holistic subject of media planning. As Cannon (2001) noted, the arrival of the internet not only changed the requirements for media planning but also negatively affected the discourse, causing both academics and practitioners to revert to exploring siloed algorithm models designed to optimise each medium independently rather than looking at the whole process. Gerstman (2019) also suggested that the subject of media planning practice has been “largely overlooked”, perhaps due to its intermediary function and the fact that it trades predominantly in expertise, where the work is less visible than the production and creative outputs of advertising (*ibid* p. 7).

What is evident from both the academic literature and practitioner discourse, is that the task of media planning has become more complex over the last decade. This is due in part to the rapid evolution of digital technologies driving fragmentation and proliferation of media options (Carlin 2005, Kaul 2012, Steele *et al.* 2013, Fulgoni and Lipsman 2017a), the heightened focus on accountability and effectiveness brought about by the 2007 financial crisis (Binet and Field 2008a, Spilker-Attig and Brettel 2010, Cox *et al.* 2011a, Stewart 2019) but also because of the consequent changes in consumer media consumption patterns (Soberman 2005, Sasser *et al.* 2007, Krajicek 2013, Young 2014, Tafreshi *et al.* 2016). As Young (2014) noted, the ongoing turmoil brought about an “invigorating tumult of fresh ideas,

inspiration and innovation in the marketing and promotion of brands” (*ibid*, p. 1). No longer are media plans restricted to assessing the handful of channels that dominated the media planning discourse up until the mid-1990s. Now agencies talk about the media 'ecosystems' or 'connected planning' (Dyson 2014) and the sector faces many challenges with the continual increase in data sources and the rise of automated, real-time, programmatic systems that use AI and chatbots to support planning and trading requirements. There are now many ways to reach consumers and many more brands and countries across which budgets can be allocated, all of which has made the process of media planning more complex and increases the demands placed on those working in the profession:

“ more than ever, clients need experts to help them get the most from their media budgets – experts who understand the media landscape and how to use it most effectively; and experts to measure, monitor and maximise the payback. Complexity and speed make the communications industry a very different animal” (Dyson 2014)

Within this complex and turbulent environment, changes in technology, consumer habits, demographics, and marketplaces, traditional techniques are being challenged and it is likely that new processes are emerging. However, a review of media planning literature identifies little related to the holistic issues facing media planning in this new digital environment. Bulearca & Bulearca (2009) suggested that there are some useful frameworks which can act as a starting point, but that there is a need for *“a more complete and accurate picture”* to identify *“patterns of right decisions for various situations”* to ease the future work of media planners. Truong *et al.* (2010), also commented that there was a *“paucity of research”* into how traditional advertising strategies might need to be modified *“when the content is digital and diffused through interactive media”* and warned of significant risks in applying mass-marketing thinking to the new digital era (*ibid*, 2010 p. 710). This is echoed by Kerr *et al* (2015) who noted that many agency planning models which drive advertising strategy, tactics and investment, are underpinned by assumptions, models and theories from the 1970s and 1980s. They raise questions about the applicability of advertising theory developed in a mass-media environment to today's interactive marketplace and argue that strategies based on models, structures and experiences developed with traditional media may need to be modified in this digital environment (*ibid*). Reflecting this, Stacey and Mowles (2016) who state that managers need to *“think about what they are doing and why they are doing it as an antidote to mindlessly repeating outmoded theories”* (2016, p. 1)

However, media planning is not only affected by the increasing complexity of the external marketplace. There have also been several infrastructure and organisational issues that have had an impact.

In relation to structure, specialisation and integration, agency practitioners have identified that the silos created by marketing disciplines are now anachronistic and that there is a need to stop organising marketing by cottage industries (Millar 2012, Tod 2012). Millar (2012) concluded that there is a need for a more collaborative mix of skills across insight, communication strategy, channel planning, creative, technology and experiential, to develop interconnected teams that think about people and their networks, not platforms and channels. Emery (2017) agreed, stating that legacy structures still dominate and fail to help clients

navigate or integrate the new media environment appropriately, which adds to the ambiguity and complexity facing practitioners.

Undoubtedly systems are being devised within agencies and client organisations to enable effective integrated communications planning to be undertaken, but the ability to plan media holistically continues to be frustrated by the general disconnectedness of media measurement (Assael 2011, Fulgoni and Lipsman 2017a, Malthouse *et al.* 2018). Fulgoni & Lipsman (2017b) suggest that metrics have been part of the problem but believe that they also promise to be part of the solution. They note that the fundamental metrics of media planning, such as impressions, reach, frequency and demographics do not need to go away, but need higher levels of validation to ensure that the inventory bought is clean, legitimate and appearing in environments conducive to effective advertising:

“The problems of identifying the right metrics further were compounded by corruptive practices in digital media ... [and] various forms of digital pollution that made the environment less attractive and harder for marketers to navigate” (ibid, p. 127)

In addition, whilst marketers and advertisers might recognise that the old ways of measurement are no longer sufficient, data is seen as key to resolving this, and a stream of research is now being undertaken to conceptualise and build measurement and attribution systems that can better understand the effects of offline and online actions, although attribution remains very digitally orientated and is predominantly symptomatic rather than causal in the outcomes that it displays because it is crafted from the behavioural perspective (Kee 2012, Peters *et al.* 2013, Dawes *et al.* 2018, Ford 2018, Nisar and Yeung 2018, Zhao *et al.* 2019). The appeal of behavioural accountability is reflected in the fact that over 60% of all advertising expenditure in the UK now goes to digital media, underpinned by a rise in accountable, activation objectives for advertising campaigns and short term KPIs (Binet and Field 2013, Romaniuk and Sharp 2015, WARC Data 2020). This has given rise to further industry debate around the planning horizon, with protagonists claiming that long term planning is now inappropriate:

“Three-year strategy horizons are meaningless in a digital world where the environment changes every day – your strategy needs to become tactical and changes in tactics need to instantly feed changes in strategy” (Outram, 2016, p. 8).

Exacerbating this has been the ongoing changes in agency structures and the rise of the giant agency networks, the foremost of which is WPP. This is relevant because media strategy and planning sits within the client marketing function and within an advertising agency context, therefore both the agencies organisational environment and the client-agency culture could be key determinants on the media strategy-making process. Within agencies, the internal influence is reported to have increased, as the majority of the big UK media planning agencies have been bought by, or formed by, the large international holding companies, and according to Farmer (2015), just ten buyers now account for 80% of all money spent, with that activity concentrated into six major holding groups: the French multinationals Havas and Publicis, the US-based Omnicom and Interpublic groups, and the British multinational groups, WPP and Dentsu International (formerly Dentsu Aegis Network).

This is seen to have driven an over-commoditisation of tactical media buying and created a need for the rapid diversification of services through which to drive new income streams and continued growth (Farmer 2015, Ragothaman 2015). Rather than driving consolidation, this constant push forward has further fragmented the industry as practitioners' experiment with different aspects of the digital ecosystem. The rush towards new tools and techniques has been essentially unregulated, giving rise to issues of accountability, transparency, and even fraud, with some industry commentators describing the situation as being akin to the Wild West (Ritson 2017). These assertions have led to a reduction in trust between media owners, agencies and clients (Mortimer and Laurie 2017, 2019), and similarly a loss of trust between consumers and the wider offering of 'advertising' (Ha 2004, Xiao *et al.* 2018, Thomas and Jadeja 2021). As noted by the Advertising Association (2019) public favourability towards advertising has declined from around 50% in the early 1990s to just 25% in 2018, as shown in Figure 1-3 below.

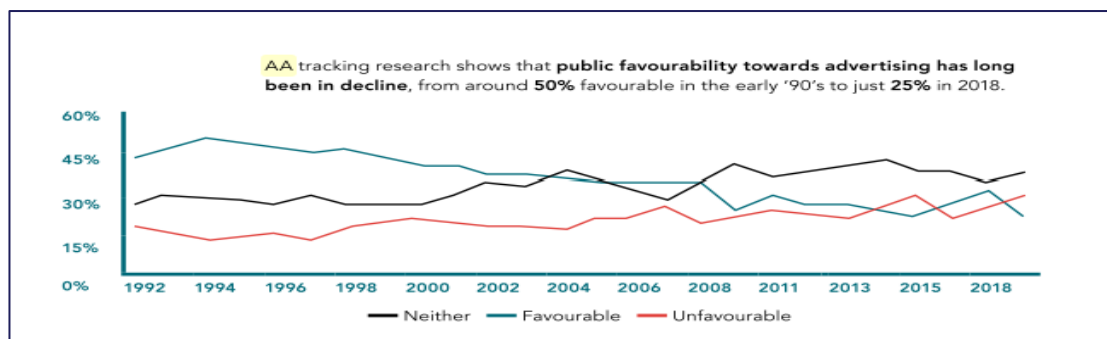


Figure 1-3: Public favourability to advertising (AA 2019, p. 6)

Healy (2016) suggests that looking forward, the emerging discipline will differ from what went before and will focus primarily on designing a total consumer experience rather than being consigned to separate silos, such as advertising, media, and digital; with strategy having a crucial role to play in a technology-driven future. Similarly, Young (2014) identifies the rise of the super planner and Davis (2018) notes that with all of this, the role of Media Planners' has grown, commenting that the tools they have developed and the expertise offered are now on the cusp of bringing transformation into the media agency proposition and suggesting that the opportunity exists for more outcome-based marketing.

It can be seen that advertising media planning is complex and exists in a state of ambiguity and turbulence, if not, transition. Experimentation is prevalent and with the growing focus on short term and tactical solutions, it can be hypothesised that the deductive and prescriptive media strategies that have characterised the industry historically, are being challenged by more emergent and inductive approaches.

Exploration of this industry sector should, therefore, help highlight the issues and challenges being faced in media-strategy formation under dynamic conditions of complexity. To guide this exploration the following aims and objectives have been established.

1.2: Research aims and objectives

The context under consideration is the approach to strategy making within the advertising media planning environment, where, in the light of the dynamic environment and challenges seen within the advertising industry, it is suggested that older models and frameworks may not be appropriate and should be revisited (Truong *et al.* 2010, Kerr *et al.* 2015).

This thesis therefore aims to explore whether the changes and challenges faced by the advertising industry are driving focused tactical innovations in the media planning process, or whether they reflect a more profound change in the way media strategy making is being approached. To understand this, it is necessary to explore the existing models that guide the media strategy formation and the media planning process to identify whether new strategy making approaches and processes are being used, and if so, how they vary from the existing models. In so doing, I hypothesise that with the apparent turbulence, innovations and refinement being seen around media and media channels, the formulation of the media strategy, traditionally the key starting point for any media plan, is changing. Therefore, the core objectives are:

- To explore the strategic practices, models and processes being used to guide the media strategy formation and the media planning process
- To identify if new approaches are emerging around strategy formation within marketing and advertising media planning
- To develop a media planning framework to guide strategy formation in the current complex environment

In addressing these objectives, the research aims to contribute to both the understanding of media strategy making but also to the wider discussion around strategy and strategy making in general. As Kerr *et al.* (2015) contend, there would appear to be substantial increases in advertising efficiency and financial gain in using planning models that correctly reflect today's consumer, media systems, and marketplace, rather than the standards of an earlier marketing ecosystem.

1.3: Research questions

The overarching research question is how do UK media planners approach the development of the strategy making that underpins their media planning recommendations and how does this differ from the existing theories?

To reflect the different aspects of this, the following sub-questions are asked:

- RQ1: What are the major theoretical frameworks, concepts, issues and debates within the fields of advertising, media planning and strategy making that support understanding and execution of media planning in the unpredictable and changing digital environment?
- RQ2: What are the narratives around how media planners currently approach media strategy and planning?
- RQ3: What types of data do media planners currently use to formulate the media strategy and plan?

1.4: Research approach

To answer these questions, a multi-stage, exploratory approach was undertaken, encompassing, on the one side, a review of relevant literature and on the other side, analysis of primary data collected through in-depth interviews and a wider survey amongst media planning professionals.

The initial stage addresses the first research question (RQ1): *What are the major theoretical frameworks, concepts, issues and debates within the fields of advertising, media planning and strategy making that support understanding and execution of media planning in the unpredictable and changing digital environment?*

This includes an examination of the major theoretical frameworks, concepts, issues and debates within the field of media planning, together with relevant related theories and principles from marketing, advertising, and communication that support the understanding and execution of media planning.

The literature specific to media planning and media selection is extensively explored to identify guiding concepts, models, factors and frameworks that have been proposed to support media strategy formation and media planning processes to date. Identified within this is the trajectory of media planning as a craft, from their work as implementational media planners and buyers through to the rise of media-strategy making as a distinct aspect. Acknowledged to be a multi-criteria decision process, this change in approach has further expanded the range of factors that need to be considered. This includes marketing and market factors, advertising communication and message factors, and a wealth of media factors, the understanding and interpretation of which lie at the heart of the media planners craft. To support this, relevant literature related to marketing, advertising, and communication is explored, together with a review of the early conceptual debates between practitioners and academics which still shape media planning and buying decisions, together with the current issues and challenges that are identified.

However, whilst terminology such as strategy and planning are used explicitly throughout the media planning literature, there is no theoretical debate around the nature of strategy making. Therefore, to assist with the interpretation of the suggested media-strategy making processes, it is also important to review the literature that supports the broader area of strategic management where more specific debates around general strategy making approaches and the inter-linking issues of strategy making, planning and implementation can be found. This reveals that, whilst deductive, rationalist strategy making approaches tend to dominate management and professional practice, a wide range of approaches exist along an ontological continuum from the deliberate and highly prescriptive through to the more emergent, inductive and interpretive. Many situational factors are shown to influence which strategy making approach could be adopted. Firstly, the influence of human actors is shown to impact on the strategy-making approach through organisational and cognitive bias. Alongside this, the pace of change and predictability, or not, of the market and external environment are shown to be important factors to consider. Reflecting on these, it is clear to conceptualise that the strategy-making of media planners should lie at the inductive and

emergent end of the spectrum due to the changeability and challenges that have been described within the industry. As a result, the literature is divided into four key sections demonstrating the exploration that was undertaken to support this research.

The next stage of the research sought to gain the voice of media planning professionals through primary research using a multi-method research design.

The first study was designed to explore research question two, (RQ2): *What are the narratives around how media planners currently approach media strategy and planning?* For this, in-depth expert interviews were undertaken with senior media strategists and planners designed to capture their narrative around how they approach media strategy and planning.

A second study was designed for RQ3: *What types of data do media planners currently use to formulate the media strategy and plan?* This used a survey of media planners and in-house marketers to identify what types of data media planners currently use to formulate the media strategy and plan. Textual analysis, utilising both thematic and content analysis methods were employed to code and analyse the data.

1.5: Relevance and contribution of the study

As noted earlier, this is an important area of research because, despite it being an industry where multiple billions are spent on advertising and promotions each year, there is a lack of current research into the holistic strategy-making process. As such the study looks to make a number of contributions:

Firstly, to expand current knowledge of strategy making in the context of the advertising media strategy making and planning process. This includes exploring the various stages that occur when a media campaign is being developed by an agency and the process undertaken to identify if new frameworks are suggested. This is important as the literature suggests that models developed in a mass-marketing environment may not be applicable in today's digital environment (Kerr *et al.* 2015) and that clients are reviewing their approaches to media planning and buying because of a perceived lack of knowledge and transparency in what their agencies are doing resulting in declining trust and conflict with their agency counterparts (Zolkiewski *et al.* 2008, Gambetti *et al.* 2015, Mortimer and Laurie 2017, 2019, Laurie and Mortimer 2019). Therefore, a better understanding of the advertising media strategy and planning process would be beneficial.

Secondly, changes seen within the field of media planning and strategy making can be generalised to the wider strategy making literature to understand how the media strategy-making process has adapted and been shaped by changes imposed by both the external and internal environments.

Thirdly, to add to the debate around strategic management as both a theory and practice, looking at the strategy-making process and how it may be changing under conditions of complexity, turbulence and uncertainty.

1.6: Limitations of the study

In terms of primary research, this study was limited to London and the South of England. To reflect the range and diversity seen within the industry interviewees were drawn from both representatives of major global agencies networks based in London and smaller independent agencies based around London and the South East of England. However, whilst a level of ‘saturation’ was attained around key themes (Miles *et al.* 2013, Patton 2014), the questioning was not exhaustive and remained focused on the advertising media strategy-making process rather than delving into the consequences of the market context. Participants reflected on the changes they had seen within strategy making across their careers and the processes that were currently being used. This enabled triangulation with the practitioner-oriented strategy making process frameworks that are explored throughout the literature. Consequently, the study did not explore all of the issues that may be impacting on the complex planning environment (for example Brexit, Covid-19, etc) but remained focused on the practitioners’ day to day execution of their craft. These issues are discussed in depth in Chapter 7, which explores in detail the methodology, research design and limitations.

1.7: Outline of the thesis

This research is divided into nine main chapters, with an additional three detailing the bibliography, abbreviations and appendix. This first chapter, establishes the key objectives for the study, outlining the context under consideration and the research questions developed to guide the research.

The next four chapters extend the contextual detail around media planning and, in particular, the development of media strategy as a specialist offering, as outlined in Figure 1-4 below. These chapters aim to explore the literature that supports media planning and how strategic thinking is applied to the multi-criteria media strategy-making process.

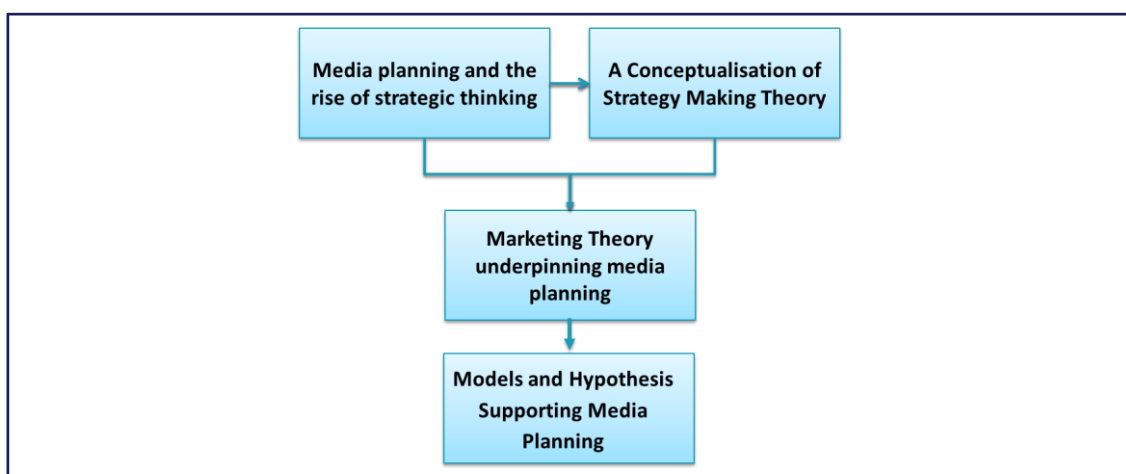


Figure 1-4: Four chapters exploring theoretical discourse around media planning

Chapter 2: Provides an introduction to media planning and summarises the origins and more recent trajectory of the field in terms of role and responsibilities. From its beginning in the early 20th century, it identifies three significant developments. Firstly, the separation of media planning and buying from the core full-service advertising operations to form

independent global networks offering expert media services. Secondly, the development of the media strategy as a key stage in the development of media plans, and with it, the confirmation of the media strategy being an important part of the marketing plan. Thirdly, the ongoing expansion of the media planners remit with the continued advancement of digital tools and technologies across paid, owned and earned media options. Building on this, it highlights some of the issues facing media strategists, including the unpredictable, turbulent and complex media environment they have to navigate. To support this, the chapter reviews the media planning process models and frameworks proposed by academics and practitioners to guide the multiple steps in research, analysis and evaluation that have to be taken around the media plan. This identifies subtle changes over the last few decades, but critically demonstrates that despite the challenging digital environment there is little current research questioning or proposing new frameworks around the media strategy-making process (Berman *et al.* 2007, Truong *et al.* 2010, Cheong and Kim 2012, Healy 2016, Davis 2018, Gerstman 2019). This supports the rationale for undertaking this research and underpins the aims and guiding research questions.

Chapter 3: To help understand the meaning and narrative around strategy making, this chapter explores the extensive body of work around the concepts of strategy making, as articulated within the field of strategic management. The strategy literature is divided into numerous streams, each rich with discussion about the many nuances from other fields including sociology, psychology, organisational behaviour and economics, and this review attempts to synthesise the debates surrounding strategy making to summarise the possible trajectory and identify issues and challenges that are relevant to the media strategy making context. As a result, the chapter explores theories around complexity and uncertainty in relation to unpredictable environments and how these might affect strategic thinking. It demonstrates that the complexities and turbulence of the digital environment are causing decision making within strategy formation to be more emergent, as people take onboard new conditions and respond to changes in their marketplace. Reeves, *et al* (2012) highlight that these changes in strategy formation relate to a sectors' ability to shape and adapt to the changing times and are therefore often situationally driven. They position media and professional services as straddling the divide between shaping and visionary, underlining the increasing degree of unpredictability found within these markets. This chapter offers insights into the nuances of different approaches to strategy making and serves to support the interpretation of the media strategy making situation and how practitioners are responding to the more turbulent and complex conditions.

Chapter 4: To support the interpretation of the media planning process frameworks, this chapter explores key aspects of marketing that impact the media planning decision-making process, in particular, how the aims and objectives of marketing are reflected in the decisions that media strategists take. This identifies the importance of the initial briefing between marketers and media planners as a key source of data that informs the strategic decisions taken.

Chapter 5: This chapter concludes the literature and explores the advertising and communication theories that underpin media strategy making and help to understand how a campaign may work holistically. These include traditional communication theories such as one-stage and two-stage communication models, the application of Hierarchy of Effects modelling to customer journey planning and considerations of context, along with a number of the general frameworks, concepts and heuristics that support the more subjective, non-rational media strategy decisions that are made. Accompanying this is a short review of the media modelling literature that addresses concepts such as audience reach, advertising repetition/frequency effects, recall and recognition measures. This explores key points in the trajectory of the literature from the simple linear programming models offered for single media optimisation in the 1960, through to the black box and programmatic algorithms that assist multi-media decision making today.

Chapter 6. This chapter presents the research methodology and supporting discussion around my chosen constructivist philosophical approach that informed the design of the study (Robson 2011). Following this I describe the research process and the practical procedures used to collect the data, together with a discussion of why they were chosen and how they aided the reliability and validity of the research undertaken. I complete this section with a discussion of ethical consideration that underpin the work and any limitations that were found along the way.

Chapter 7 reviews the findings from Study 1, which used in-depth interviews with senior industry practitioners to explore their experience and practice around media strategy making. The chapter outlines the various topics that were discussed and the themes that were identified. These demonstrate that the approach to media strategy and planning has changed in response to both the elevation of the role of the practitioner and the dynamic digital environment. These findings are used to develop a revised media planning process framework that more closely represents the approaches currently being undertaken.

Chapter 8 reviews the findings from Study 2 which surveyed industry practitioners around briefing procedures and their information needs. This was underpinned by existing research from Cowan & Abratt (1999) and indicates that many new information sources are used. These findings are consolidated to develop a revised briefing checklist for agencies and clients.

Chapter 9 draws together the discussion and conclusions from primary research and outlines the contribution made to both theory and practice.

Chapter 2: Media planning and the rise of strategic thinking

2.1: Introduction

This chapter provides an introduction to media planning and summarises the development of the profession from the early 20th century in terms of its role and responsibilities.

The initial section explores the changing nature of media and how the professional role of the media planner has developed from that of an implementational buyer of media solutions to being an integral part of the strategic marketing team. In particular, it explores the key changes in the media landscape that are impacting on the strategy making process.

The chapter culminates with a review of the overarching frameworks that have been proposed to guide the overall media strategy and planning process. These frameworks seek to guide the multiple steps in research, analysis and evaluation that are taken to develop a media plan and identify subtle changes over the last few decades.

Critical here is the fact that in this challenging digital environment, whilst there is a regular supply of media related research exploring siloed media usage, there is little current research from either academics or practitioners looking at the holistic media strategy-making process (Cannon 2001, Berman *et al.* 2007, Truong *et al.* 2010, Cheong and Kim 2012, Healy 2016, Gerstman 2019). This supports the rationale for undertaking this research and underpins the aims and guiding research questions.

2.2: What is media planning?

Media planning is a specialist area within advertising and marketing communications and involves identifying the best media vehicle, or a mix of vehicles, in which to place the advertising or promotional messages so that they deliver the required marketing communications effectively and achieve the organisational communication objectives (Donnelly 1996, Crawshaw 2004, Soberman 2005, Katz 2019). Jenkinson (2003) adds that media planners look to identify and select the communication platforms that can most effectively transfer the organisations' marketing messages to their desired audience to encourage that audience to offer the required attitudinal or behavioural response. Recent definitions firmly establish the strategic importance of media strategy and planning within marketing communications, with Katz (2019, p. xi) affirming that:

“today’s media specialist must increasingly work as a marketing specialist, looking beyond traditional media to all the means available for brands to communicate successfully with consumers” (2019, p. xi).

However, the generic term ‘media’, or medium for the singular, can mean many things. Early media planning literature predominantly referred to media such as print, the press, radio or television (Pasadeos *et al.* 1997). Donnelly (1996), author of *Planning Media: strategy and imagination*, stressed the breadth of opportunity, saying that a medium is simply a way to transfer information about goods, services or ideas from the producer to the consumer. This is echoed by Peters, *et al* (2013) who state that a medium, in the context of

communication, is simply a means for storing or delivering information or data, and as such, marketing messages can be communicated via a plethora of communications platforms, from traditional media, such as TV and newspapers, through to websites and mobile or experiential events and experiences.

McLuhan's (1964) proposed the concept of the medium as the message. This created role-based classifications for different media types around their communication qualities, but more recently commentators have identified that newer digital media undermine the conventional wisdom around what individual media might do best. White, *et al* (2004) suggested that the multiskilling of digital media offered new and different ways of connecting with customers. They also predicted a generational change would affect both the culture and the way people use media, suggesting that Millennials' are growing up to be more confident and empowered in their media usage than their predecessors, with many having their own media networks, channels and/or websites – all of which opens up a rich territory for marketing to communities of peers. Bolin (2011) would concur and argues that digital media can be considered a mix of mass and interpersonal communication platforms. Two key developments have driven this, firstly the internet enables the publication of massive user-generated content, and, secondly, social media enables one-to-one communication, as opposed to the one-to-many communication structure of traditional media. Granados (2016) adds that media facilitate the communication of ideas or content, whether in video, print, or audio, with little or no demarcation now as to whether the message, the medium, or the messenger is produced professionally. Echoing this, Clifford (2018) notes that these developments have changed the definition of a medium, with the emergence of what they call 'hybrid mediums', where publishers can offer mixed-medium experiences encompassing text, audio and video all in one environment.

Most recently, Katz, author of *The Media Handbook*, identifies that the world of media now includes opportunities that advertisers pay for, such as radio, television, or digital advertising, but also owned media options, such as their' websites and social media pages. In addition, advertisers can earn media messaging from consumers, particularly via social content. All of these offer the media planner a broad and rich palette by which to convey content and advertising messages to the audience (2013, 2019, p. 4).

2.3: Development of media planning

The role of the media planner has changed dramatically over the last three decades, fuelled in part by the evolving media landscape but also by changes in the organisational structure.

Donnelly (1996), identified that the role of media planning developed during the second half of the nineteenth century through the organisation of media buying. He pinpoints the origins of media planning, and advertising agencies in general, to Volney B Palmer, who, in 1841 acted as a media broker in Philadelphia, being paid by commission from the publishers. Shortly afterwards, the NW Ayer Agency differentiated itself by focusing its attention on the advertisers, although still paid by the publishers. Lord & Thomas concluded in 1905, that advertising was "*not just news, but salesmanship in print*" (*ibid* 1996, p. 4).

Advertising and publishing are still bound together in this way. Publishers still offer agency commission to the booking agency, generally in the order of 10-15% of the purchase price of space or time, together with other negotiated volume discounts or rebates. In regards to overall agency remuneration, there is currently a mix of models and methods, with many agencies returning some, or all, of the publisher commission to their client, preferring to charge an annual retainer or hours related fee for each project, sometimes with an incentivised performance/results related element (Schultz and Kitchen 1997, Binet and Field 2008b, Farmer 2015, Heo and Sutherland 2015).

In terms of the media planning process, Chandon (1976) identifies that media planning used to sit alongside creative planning, or copy planning, as outlined in Figure 2-1. But according to Moriarty *et al.* (2015, p. 23–24), with the increased focus on creativity, media planning became “*side-lined*” for many decades, perceived as an easy process which facilitated the delivery of the advertising message and “*certainly not seen as either esoteric or entrepreneurial*”.



Figure 2-1: Media Planning (Chandon, 1976, p.1)

Pasadeos *et al.* (1997, p.23) suggested that until the late 1950s media decisions were of a tactical nature, being primarily a cost and reach focused exercise to identify the building blocks of a media schedule (Percy and Rosenbaum-Elliott 2009, Lane *et al.* 2010, Belch and Belch 2011). As a result, even relatively recent models place media planning and setting the media strategy at the end of a communications planning process as detailed in Figure 2-2.



Figure 2-2: Five-Step Planning Model (adapted from Belch & Belch, 2008)

In this model, the communication strategy, advertising strategy, and even the creative strategy/execution are being determined before the media strategy and selection of media class or vehicles have been considered (Belch and Belch 2007, 2011, Sissors and Baron 2010).

According to Donnelly (1996, p. 4), the focus moved back on to media planners in the late 1950s with the advent of television advertising and has continued because of the ongoing proliferation of media vehicles, fragmentation of media audiences and rising costs of media over subsequent decades. This has made reaching consumers more difficult and radically changed the cost economies of advertising. Donnelly concludes that media planning became more “salient” because media spend and deciding how the advertising message should reach the consumer, now represents between 80% & 90% of any advertising budget - raising media planners to the role of “quasi investment counsellors” tasked to drive cost-effectiveness and optimise audience delivered (*ibid*, p. 4). This is evidenced through the literature with numerous researchers proposing multi-criteria decision making (MCDM) models to help make superior scheduling decisions in the face of the complexity and large volume of information available (Charnes et al. 1968, Calantone and de Brentani-Todorovic 1981, Cannon 1988, Turk and Katz 1992, Pasadeos et al. 1997, Cannon 2006).

Turk & Katz (1992, p.19) add that media planning underwent substantial change throughout the late 1980s and early ‘90s, which “shaped the emergence of media strategy as a keystone in marketing operations” and positioned the media function alongside that of creating messages in the overall advertising strategy. They predicted that as more media options were offered to consumers, “the task of the media planner, or strategist, will become more complex and demanding” (p. 36). Donnelly (1996) cemented the elevation of media strategy by highlighting that if media planners follow the logic of the marketing decisions, their plan should have an “almost sleek operational efficiency” (p 23), and by imagining the exchange, and the value being added, they will be able to build creative effectiveness, selecting the media and combinations of vehicles that most synergistically support the condition to stimulate and close the exchange process. Viewed this way, media planning is an integral part of the marketing system, reflecting decisions made within the plan and adding to the plan through its own decisions and insights, as articulated in Figure 2-3 below.

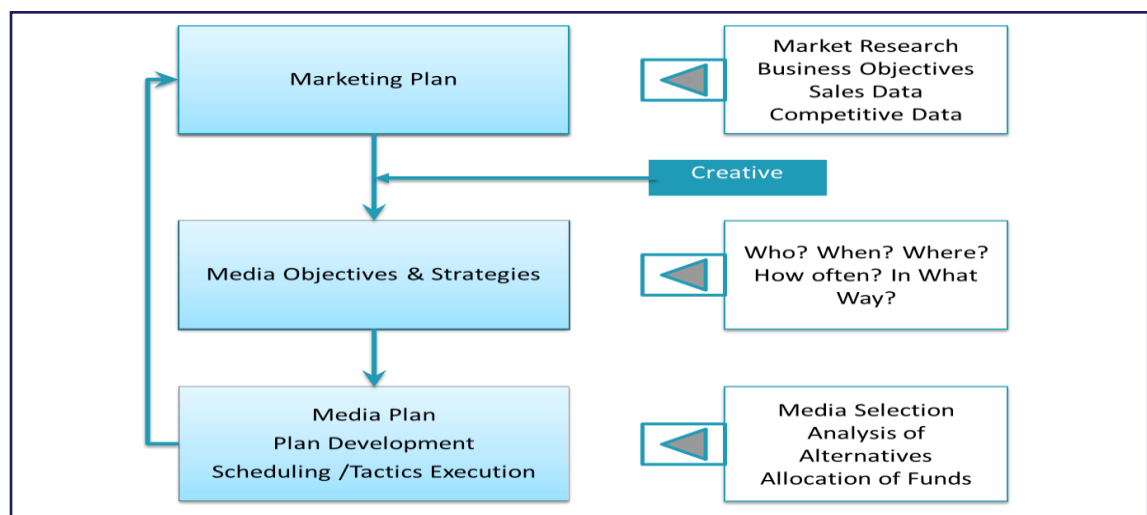


Figure 2-3: Media Planning Extends Marketing (Donnelly, 1995, p. 25)

Surmanek (1996, 2003) built on this and identifies the rise of marketing science, where media planning is seen as being a sophisticated craft, managed along scientific principles. He saw it as integral to every marketing plan, especially as the number of media outlets and cost of media “tends to increase each year, making investment decisions ever more critical” (p. 193). Even then, he noted the staggering array of data that needs to be considered to formulate a coherent strategy, and stated that:

“ the quantity of numbers generated prevents planners & buyers from spending the time to look into the numbers and see what made them happen in the first place. Sometimes the numbers become the rationale rather than the guideline” (Surmanek 1996, p. 194).

To overcome such number blindness, Surmanek (1996, p. 194) offered a list of ten guidelines, as outlined in Figure 2-4 below. These indicate clearly that the media planners’ role had changed to something considerably more than just optimisation and scheduling media space and time.

Be a money manager	Maintain what you have built
Remember effectiveness is primary	Be involved in the total marketing picture
Be creative	Keep everyone informed
Be conversant with all forms of media	Establish rapport with media suppliers
Evaluate all reasonable alternatives	Contribute beyond media

Figure 2-4: Principles of Media Management (Surmanek, 1996 p. 194)

A recurring theme here is the rational aspect of the “investment manager”, analysing which media will give “the best return” and recommending “a strategy for how best to use them” (Young 2014, p. 131). This theme was picked up by Cowan & Abratt (1999) who suggested that with the increased complexity of media planning it was important to include media planners in the strategic planning team.

2.4: The rise of media strategy

The inclusion of media planners in the strategic planning team was a natural development for the industry. As Collin (2003) identified, 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 Return on Investment (ROI) model, thus enabling them to establish measurement and key performance indicators (KPIs) at the beginning of the process (Binet and Field 2008c, Woodward 2011). However, this led to a blurring of lines between traditional account planning and media planning.

The account planning role had developed throughout the 1980s and 1990s to research consumer behaviour and derive insights that might inform marketing, advertising or media strategy. There was some sniping from account planners at the time as they defended the difference in their roles, particularly in the area of presumed media, or discount-driven bias in media planning, where media would be chosen to suit the media agency volume discount goals rather than being driven by consumer media consumption insights and the client marketing goals.

2.4.1 IMC and Media neutral planning (MNP)

Media neutrality, and Media Neutral Planning (MNP), was proposed as the solution, with the vision that the newer breed of communication planners should “*consider all potential points of contact, interaction and influence*” in the lives of customers to find “*fresh, efficient and effective ways to communicate*” (White *et al.* 2004, p. 3).

MNP was proposed as a way of finding a driving idea, brand thought, or big idea, that would govern the detailed execution across the whole palette of marketing communications techniques and mediate between the broader communication goals of integrated marketing communications (IMC) and customer relationship management (CRM) within integrated marketing (Collin 2003, Jenkinson 2003, p. 7, White *et al.* 2004). This also reflected a move from ‘deference’ to a ‘reference’ society and from commercial messages based on influence rather than awareness (Marquis 2003, n.p.).

A key goal of IMC is “*consumer first*” rather than “*tools first*”, and similarly, the aim of MNP is to place the consumers at the heart of the planners decision making process (Asscher 2003, Kliatchko and Schultz 2014, p. 373). Schultz *et al* (2004) noted that integrated media plans needing to reflect both relevance and consumer preference, achieved by deliberately researching the consumers perspective before deciding which channels would most effectively reach the target audiences.

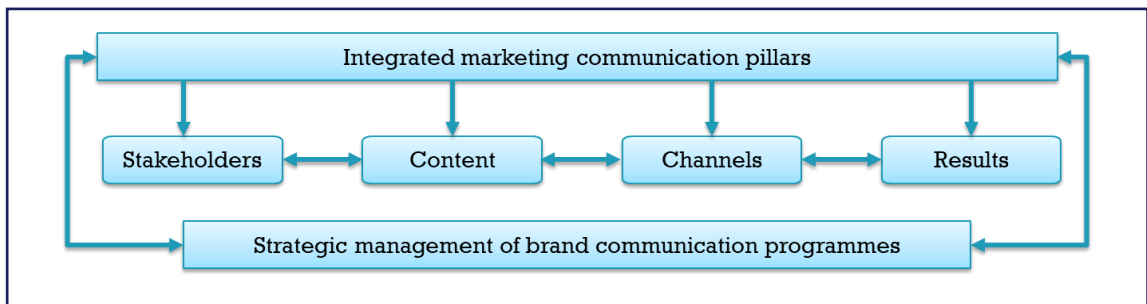


Figure 2-5: Kliatchko's Four Pillars of IMC (2008, p. 145)

Correspondingly, Kliatchko's four pillars of IMC, [shown in Figure 2.5] expressly includes 'Channels', being “*all possible contact points or touchpoints*” where customers or prospects experience the brand (2008, p. 145). Building on this, Kliatchko and Schultz (2014, p. 381) summarise the four key components of IMC as being multi-channel and media neutral, customer understanding and consumer centricity, coordination and consistency of customer experience, and the involvement across all business departments.

As identified by White *et al* (2004) MNP sought to consider communications planning in general, not just the development of the media plan. The list of MNP fundamentals, as summarised in Figure 2-6 overleaf, highlighted the importance upstream consumer-oriented thinking, which was championed regularly by agency media planners across the early 2000s as a way to vocalise their ambitions to be able to contribute to strategic thinking, rather than just delivering cost-effective impressions.

So, in a reciprocal way, media neutrality is central to the definitions of both IMC and MNP.

Media Neutral Planning Fundamentals
• Upstream thinking & implementation: What is our business idea? What is our vision & mission? What is our sustainable difference? What are we promising customers?
• Creative: Generating ideas that solve business problems
• Architectural: Building a picture of how a brand should behave, communicate and sell to employees, stakeholders and customers
• Coherence: Ensuring efficient and well-executed messaging that generates value
• Collaboration and Partnership: Unbiased and disinterested advice

Figure 2-6: MNP fundamentals (White et al. 2004, p. 5)

However, there were many barriers to implementing MNP, including resistance to change, a lack of practical training amongst both client and agency professionals, and the obvious financial conflict of interests that can be found between multi-agency teams when deliberating on how budgets should be allocated (Kliatchko and Schultz 2014).

Offering ways to counter this, Asscher (2003) raised the question of changing remuneration structures to include some form of payment by results (PBR) with the dual benefit of establishing measurable objectives for the agencies involved and rewarding collaboration by establishing joint ownership to overcome the traditional interdisciplinary gripes. To assist further, White, et al (2004, p. 74) proposed a vision for the development of media-neutral plans, with a neutral team agreeing on the central ideas before any executional development takes place, as shown in Figure 2-7.

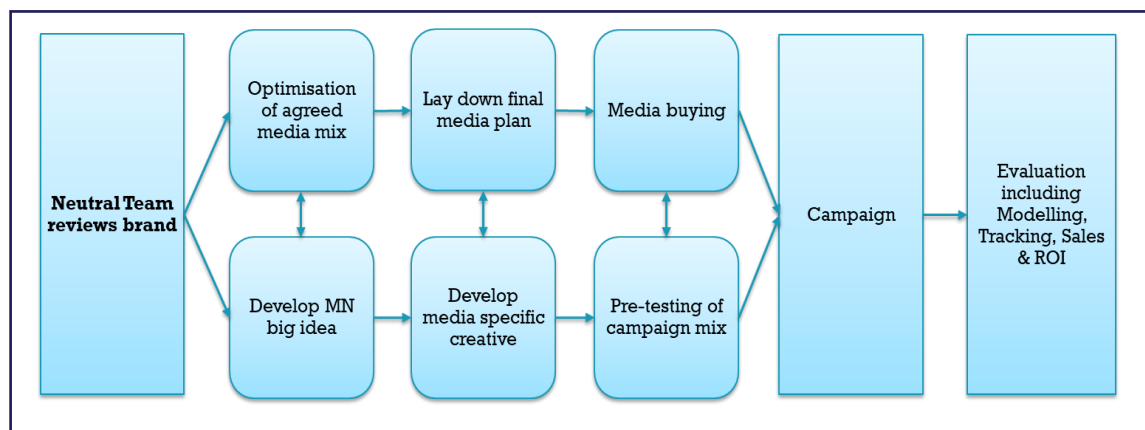


Figure 2-7: Vision of a media-neutral process (White, et al, 2004, p. 74)

This process embeds the principle of deliberating over a media strategy prior to optimising channel delivery and marks an important change in the way media planning needed to be approached. However, reflecting the commercial realities of the time, White, et al. (2004), recognised that drawing multidisciplinary teams together would not be straightforward, and stressed the importance of “the account planner(s) and media planner form[ing] a close working relationship” to prevent fighting for supremacy (ibid, p. 74).

This contrasts with the earlier models, [see Figures 2-1 and 2-2, p. 27] and confirms that a big change had taken place. Within the vision for a media neutral process, the role of media strategy was given formal credibility, with the media planner seen as part of the central team responsible for developing the communications strategy, plan and campaign, rather than merely optimising the bookings.

2.4.2 Changing agency structures

At the same time, the structure of the industry changed. The 1990s had seen many companies establish themselves as media independents, trading solely in media strategy, planning, buying and research. The media independent model “*disintermediation between media and creative*”, and challenged the “*predominance of creative agencies as the lead agency*” (Young 2014, p. 34). The economies of scale achieved through this organisational model had a positive impact on the cost-efficiencies that could be gained through volume media buying (Jacobs 1991) and supported the rising profile of media directors and media strategies as senior industry players. Within the UK, The Media Department (TMD) and Chris Ingrams Association (CIA) were amongst the first to rise to prominence and pose a threat to the full-service agencies, particularly in terms of the media buying efficiencies. By the early 2000’s, the French based Carat group had acquired, bought and merged its way to establishing a global media independent network, including scooping up TMD in the UK (Jacobs 1991, Gerstman 2019). Efficient media buying was not the only advantage. Media experts, such as Carat and Mediacom, moved on from the legacy business of advertising and mass media by committing significant resources to collecting data around consumer lifestyles and media consumption habits, “*pioneering communication planning*” (Soberman 2005, p. 421, Young 2014, p. 33). This built a second layer of competitive advantage around media research and insight, delivering “*high end strategy*” and MNP goals (Young 2014, p.34). Over the 2000s all of the major agency networks echoed this model, separating out their media department functions to build global media networks, where planners are able to consider marketing budgets in a media agnostic way and where context, relevance and involvement are key considerations (*ibid*). As a result, modern media planners gained recognition and importance, often occupying a pivotal position in the advertising process as key communication planners (Katz 2010, 2019, Lane *et al.* 2010).

In unison, media-sophisticated clients also invested in upskilling their in-house media function, bringing in media coordinators to set up and monitoring the company's local, regional or global media expenditure and planning experts to guide strategy making (Jacobs 1991, Pearl 2019). Jacob (1991 p. 8) identified the early drivers as the “*inevitable search for global efficiencies*” given the “*immense sums of money being spent on media*”. More recently the need to control owned media, such as brand websites and social media pages, has re-invigorated the in-house model to encompass a wider range of “*core-competencies*”, particularly around creative and brand-narrative work. Elements of media planning are again included within this, however due to the increasing reliance upon data services and ad tech, the majority of brands are still reliant on external expertise for execution and buying services (Pearl 2019, p. 28).

2.4.3 Expanding across paid, owned and earned media (POEM)

Building on this, the increasingly digitised media environment resulted in a subtle but significant shift of emphasis. Media planning had been about the development of plans to maximise delivery against a core target audience via selected paid-for media. However,

because of technology and more specifically, the internet, the new role requires more precision in defining the target and identifying where that audience can most effectively be reached, across various media and within segments of an individual medium.

Marshall (2011, p2) noted that the definitions of media had expanded so much that the industry created new categories, namely, '*bought, owned and earned media*':

- Bought/Paid media: referring to the traditional realms of the media planner, such as print space, television airtime or paid search marketing.
- Owned media: encompassing websites, social media pages, painted vehicles and shop windows, owned by, and generally under the control of the client marketing team.
- Earned media: the newer option made up of the comments and posts that an organisation can stimulate, or 'earn', through their planned interactions with customers and commentators. The latter, however, is not a controllable message and maybe positive or negative (*ibid*).

In this environment Pringle & Marshall (2011) suggested four important guidelines for media planning, as outlined in Figure 2-8.

Media Planning Guidelines
• Adopt a multi-media approach to engage with potential consumers, utilising a combination of media that reflect the customers' behaviour and preferences
• Leverage all the opportunities and most successfully in combinations of 'bought, owned & earned' media to deliver effective communications
• Use more precision to define the target and where that audience can most effectively be reached across the various media or within segments of an individual media
• Develop new value models to underpin media strategy and planning process

Figure 2-8: Media Planning Guidelines (adapted from Pringle & Marshall, 2011)

Gisbergen *et al* (2014) suggested that paid, owned and earned media (POEM) can perform differently. Their study found that, paid and owned were essential parts of the planned media planner's solution for achieving reach and supporting the pathway to purchase. Where earned media via social media followers demonstrated positive amplification, with their participants indicating information from friends and earned media was more trustworthy. Shared media, described as media that is "*open for followers, friends, and subscribers to contribute and comment*" is sometimes seen as the fourth quadrant and incorporated into the mnemonic, PESO or SOEP (Macnamara *et al.* 2016, Xie *et al.* 2018), although there is considerable overlap between the definitions of Earned and Shared media.

With the increasing range of media available, the media planner has become responsible for a much wider range of campaign inputs, outputs and outcomes, many of which are not directly controllable in the way that traditional paid media, such as television and print media had been. The media planning remit now extend to seeding materials into the market for consumers to pass on virally with outcomes that are entirely reliant on third party amplification (Burton 2009, Stuhlfaut and Windels 2012, Mallia *et al.* 2013, Fulgoni *et al.* 2017, Jayson *et al.* 2018, Xie *et al.* 2018).

However, the media planning environment has been challenged by more than just the mass fragmentation and proliferation of different types of media options. Consumer behaviour and the way in which media is consumed has also altered.

2.4.4 Changing media consumption behaviour

The advent of the internet, and in particular the mass ownership of smartphones has given rise to a culture of multi-tasking with media forms driving simultaneous media consumption. Simultaneous media experience is derived from consumer multi-tasking with media and therefore experiencing multiple exposures to various forms of at a single point in time. (Pilotta *et al.* 2004, Pilotta and Schultz 2005). Broader multi-tasking (MT) literature notes frequently that MT involves the rapid switching of attention from one source to another, rather than a consistent ability to be involved with two or more stimuli. Reflecting this, Lin *et al.* (2013) use the term media multiplexing to denote that consumers are consuming small but incomplete chunks of multiple media within a short time period. Media multi-tasking (MMT) such as this has been studied under a range of other topics, including multi-screening, cross-screen, social TV, dual-screen, split-screen, and dual-task. (Duff and Faber 2011, Duff and Segijn 2019) and adds a further complication for media planners trying to identify the most relevant and effective way to communicate with people in this moment and how it reconstructs attention. Concepts of IMC and message coordination suggest that there are opportunities for creating positive synergistic effects by planning for multiple ads to be exposed simultaneously as a joint experience (Pilotta *et al.* 2004). On the other side are questions of how it relates to concept of duplication, frequency and message repetition (Duff and Sar 2015, Duff and Segijn 2019, Chinchanchokchai *et al.* 2020). Equally challenging is how it might contribute to negative perceptions of message clutter or bombardment, and lead to ad avoidance or ad blocking (Galpin and Gullen 2000, Schweidel and Kent 2010, Duff and Faber 2011, Ham 2017, Clark *et al.* 2018).

The consumer-focused work of Bloxham & Sylvester (2013) from the Media Behaviour Institute, echo concerns about the possible negative consequences of excessive use of multiple digital options. They identified that the proliferation of screen-based devices (fixed and mobile) means consumers can exercise a greater degree of control and choice over where, when and how they consume or interact with content. They stressed the need to understand the implications of this, not only to make the best use of the opportunities presented but also because the nature of these changes is not likely to slow down. A decade earlier White, *et al.* (2004, p. 19) had warned that media planning, and advertising in general, would require sensitivity and fresh thinking for brands to be accepted as partners in the consumer digital arena rather than rejected as intruders. In 2014, Collin reemphasised the problems stating that:

“Communications planning is in crisis – operating within an unpredictable environment and the unbalancing of reciprocity. But if we can reorient towards creating value for people, rather than preying on their time, then ours is an industry with a positive future” (2014, p. 2).

2.4.5 From media planning to communication planning

Whether called media planning, communication planning or channel planning, the process is becoming more complex due to the ongoing digitisation of media channels and changing consumer behaviour. In addition, according to Assael (2011), good planning is often frustrated by the complex, silo driven, intra-media planning environment where channel decisions are taken in isolation, via unrelated and unconnected media measurement methodologies and, in many instances, in competition with one another (Pilotta *et al.* 2004, Schultz 2006, Assael 2011, Smit and Neijens 2011, Saura *et al.* 2017).

To resolve this, good practice argues that using insight to focus on brands and consumers at the start of the process, researching and understanding their individual touchpoints and likely communication's journey and taking an holistic view of the audiences' media consumption is important (Asscher 2003, Jenkinson 2003, Jenkinson and Branko 2004, Kitchen *et al.* 2004, White *et al.* 2004, Jenkinson 2007, Straker *et al.* 2014). Also, a solid understanding of context and issues around media interaction, repetition and synergy are recommended to help deliver the greatest persuasive effect to reach the desired communication objectives and outcomes (Jenkinson 2003, Chang and Thorson 2004, Crawshaw 2004, Schultz 2006). Adding to this, Bloxham & Sylvester (2013) suggested that by understanding the context in which consumers choose to interact with content, media planners will be better equipped to identify moments of potential receptivity, and build sustainable communication platforms that deliver communications that resonate and drive greater impact and ROI for brands.

Therefore, it can be seen that media planning is a complex multi-criteria decision-making process. The media strategy does not occur in a vacuum but draws upon sociology, anthropology, psychology, economics and mathematics. It is a data-rich field, involving the analysis of extensive product purchase and usage data, information on media types and vehicles and research into consumer behaviour (Donnelly 1996, Kozinets *et al.* 2010, Solis 2012, Cacciatore *et al.* 2016, Schultz *et al.* 2018). Reinforcing this, numerous authors agree that adopting an integrated marketing communications (IMC) perspective, albeit that in this data driven environment, the term IMC is often replaced with phrases such as 'fusion', 'insight driven' and 'holistic', (Schultz and Kitchen 1997, De Pelsmacker *et al.* 2002, Schultz 2003, Kitchen *et al.* 2004, Kitchen 2005, Barker 2007a, Laurie and Mortimer 2011, Chaffey and Smith 2013, Egan 2014, Kliatchko and Schultz 2014, Mortimer and Laurie 2017).

Communication planning, channel planning and media strategy, therefore, involves understanding complex variables. Different consumer needs, together with different market and message factors, will lead to different media choices being made, and those decisions will be supported and measured by different media metrics that are appropriate to the goals and outcome of the planned activity (Jenkinson 2003, Belch and Belch 2011, Misirlis and Vlachopoulou 2018).

In a multi-channel world, the media strategy needs to untangle an array of variables to understand the extent to which individual channels can achieve the objectives and what their contribution is to the overall goal. To support this a number of frameworks have been proposed to outline the process being undertaken, which are explored in the next section.

2.5: Media planning frameworks

Several overarching frameworks have been proposed to explain and steer the media strategy and planning process. These are important as they offer a holistic view of the process being undertaken. These are presented in specialist media planning textbooks authored by practitioners or jointly by practitioners and academics, who seek to contextualise the academic debate by identifying and disseminating their knowledge of best practice within agency media planning departments. These frameworks are therefore practical interpretations of the ways in which media planning is undertaken. They are supported by a wide range of additional models and concepts around aspects of marketing, communication, media selection and optimisation which help to operationalise the frameworks.

The key intention in this section is to identify the guiding frameworks and explore how they may have changed over the past few decades given the changing role and focus of media strategy and planning.

Two of the earliest overarching process frameworks were proposed by Chandon (1976), as outlined earlier in Figure 2-1 (see page 27) and Sissors and Petray (1976).

Chandon (1976) shows the simple process of planning involving the selection and timing of media prior to buying, with no mention of a media strategy making stage. However, the media planning process outlined by Sissors and Petray, as shown in Figure 2-9 below, does differentiate the inter-media decision, and media strategy making steps, from the more implementational intra-media selection aspects of the process.

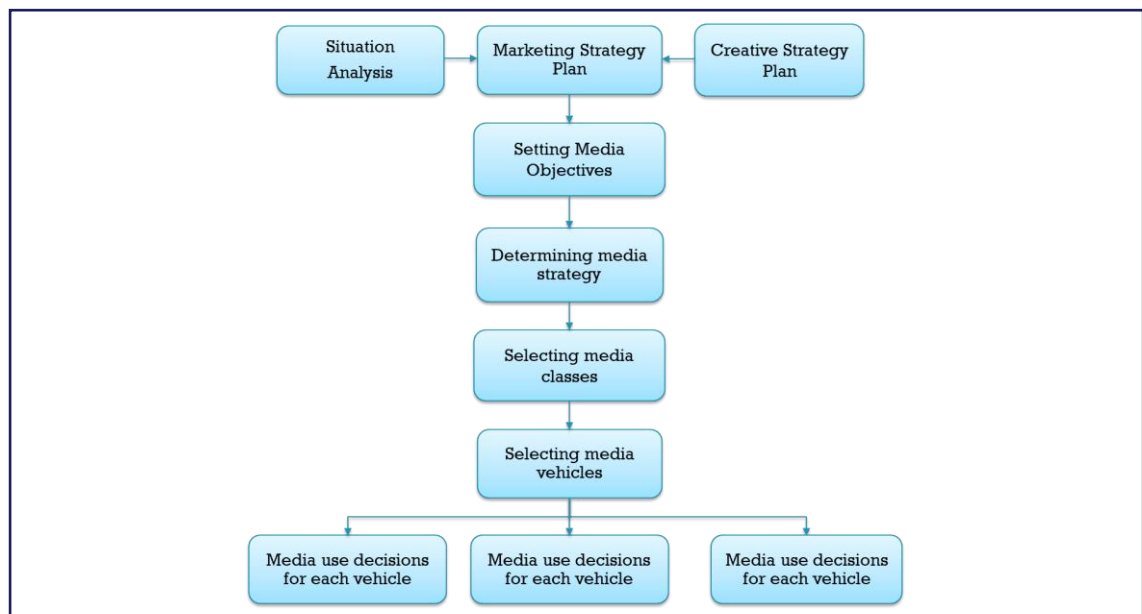


Figure 2-9: The Media Planning Process (adapted from Sissors and Petray 1976)

This is important and reflects the efforts by media planners to move from endpoint schedulers to the more strategic role described earlier. Sissors was a regular contributor to the discourse around media planning, creating and editing the *Journal of Media Planning*. The most recent iteration of his textbook, Sissors and Baron (2010) detail some of the key steps in undertaking the media plan, but do not offer a process framework to conceptualise the latest thinking. They position the media planner's work as beginning 'as soon as a marketing strategy

plan is in hand', as this 'guides the direction that the media decisions need to follow', leading to the statement of media objectives, which are the basis of the media strategy and the decisions as to which media should be used (ibid 2010, p. 16).

Barban, Cristol, & Kopec (1988, 1993) proposed the Media Decision Making Process shown in Figure 2-10 below. Writing about this model, King (1988), noted that it sought to encompass the totality of the media planning role and expose the underlying concepts, to steer advertisers away from what they saw as mediocrity, where media planning is viewed just as the task of efficiently distributing or allocating advertising budgets.

The framework proposed by Barban, *et al* (1988, 1993) is a less linear process, comprising five basic components 1) background inputs; 2) statement of objectives; 3) strategies, including target marketing definition; 4) tactical implementation around the media mix scheduling and ordering and 5) overall measurement considerations.

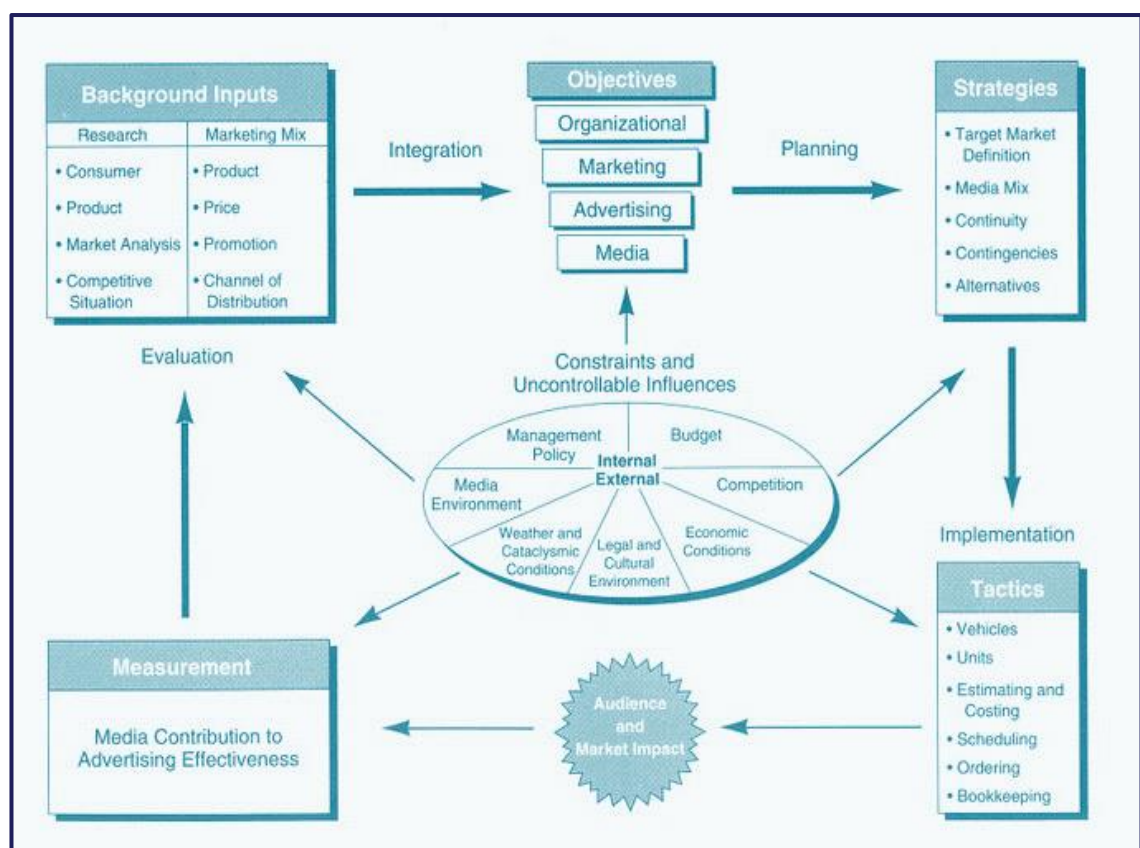


Figure 2-10: Media Decision Making Process (Barban, Cristol & Kopec, 1993, p.5)

This firmly establishes through the background review, that media planning should not operate in a vacuum but should be seen as a component of the overall marketing plan. To emphasise this, full briefing on the client's marketing plan and overall organisational and marketing objectives are explicit within the model, together with the hierarchically linked advertising and media objectives. The framework places the initial decisions around target markets and media mix within the scope of strategy making, whilst noting that the strategies will consider the changeable environment by exploring alternatives and including contingencies. The intra-media decision making is also clearly identified as being within the tactical implementational stage, where cost estimating and scheduling are noted, along with ordering and bookkeeping. Measurement is also shown as an important step in the framework

but is clearly carried out after the completion of the campaign. This stage uses formal market research or more informal feedback to assess the relative contribution of the media activity on the advertising effectiveness, which, as Barban, *et al* (1993, p.7) note, relies on an understanding of how advertising works and is 'a most difficult task'. The evaluation here is to identify what adjustments can be made to improve the next plan, thereby serving as part of the next round of background inputs. This model, therefore, includes a cycle of events that ensures that each successive stage can benefit from what has gone before.

Building on this, Donnelly (1996) explains how media planning both extends and executes the intended marketing plan (see Figure 2-3, p 28). He states that the media planner must be able to follow the logic of the marketing plan through to an effective media solution by imagining how it will influence and drive the intended exchange. Donnelly also stresses the importance of measuring success and offers some pointers to the debate around how advertising effectiveness might be measured. He suggests using the DAGMAR (Defining Advertising Goals for Measured Advertising Results) approach proposed by Russell Colley (1961), to ensure that it is measuring the advertising effect and not the marketing effect. To accomplish this the advertising goals should be specific communication tasks, such as awareness and attitude change, rather than marketing tasks, and should be measured in terms of defined audiences over a fixed time period. However, this aspect of measurement has been heavily debated, even as far back as 1964, when Kolliner (1965) argued that advertising goals should go beyond communication and be set to measure the actions around which the communication strategy was formed, such as sales. Digital and direct marketing techniques make this issue even more relevant, as shown in more recent framework models, where attribution from display banners through to website visits and sales can be tracked more effectively.

Cannon (2001), noted that the arrival of the internet changed the requirements for media planning but identified that it also negatively affected on the discourse, causing both academics and practitioners to revert to exploring siloed algorithm models designed to optimise each medium independently rather than looking at the whole process. To reconcile this, he proposed a straightforward approach to the media planning process, as outlined in Figure 2-11.

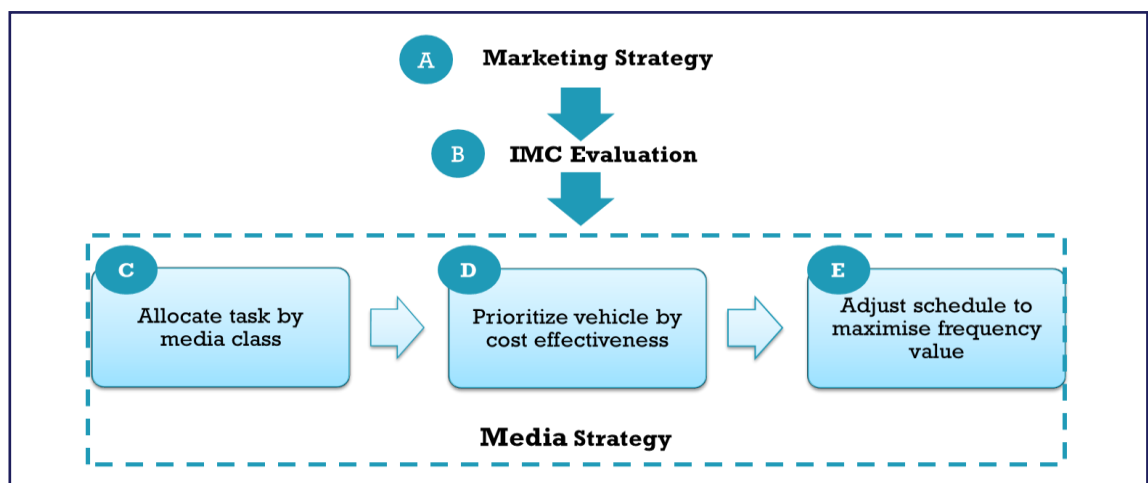


Figure 2-11: The Frequency Value Planning Process (Cannon, 2001, p.30)

Cannon's model identifies the sequential inter-media decision making necessary to establish the media strategy. This echoes the earlier thinking by placing its inception within the marketing strategy making stage so that the evaluation of the overall integrated marketing communication (IMC) is undertaken before defining the media strategy.

Step C, 'allocate task by media class', encompasses the inter-media decision-making steps described by Barban, *et al* (1993) as the media mix. This has remained the traditional starting point of the strategy as it entails considering both the characteristics of each medium and its ability to reach the desired audience or not. Therefore, this step is needed to reconcile the media plan with the needs of the creative strategy and their preferred executional formats. However, Cannon's model continues with a focus on prioritising the media vehicles that can deliver the greatest cost-efficiency (Step D), which are then evaluated through model schedules to maximise the frequency and value of impacts (Step E). This suggests that cost-effectiveness remains one of the main criteria that guide the media strategy.

To highlight the tactical and implementational requirements, Cannon's (2001) framework went on to propose a sequence of additional process steps to optimise the more implementational focused intra-media decisions.

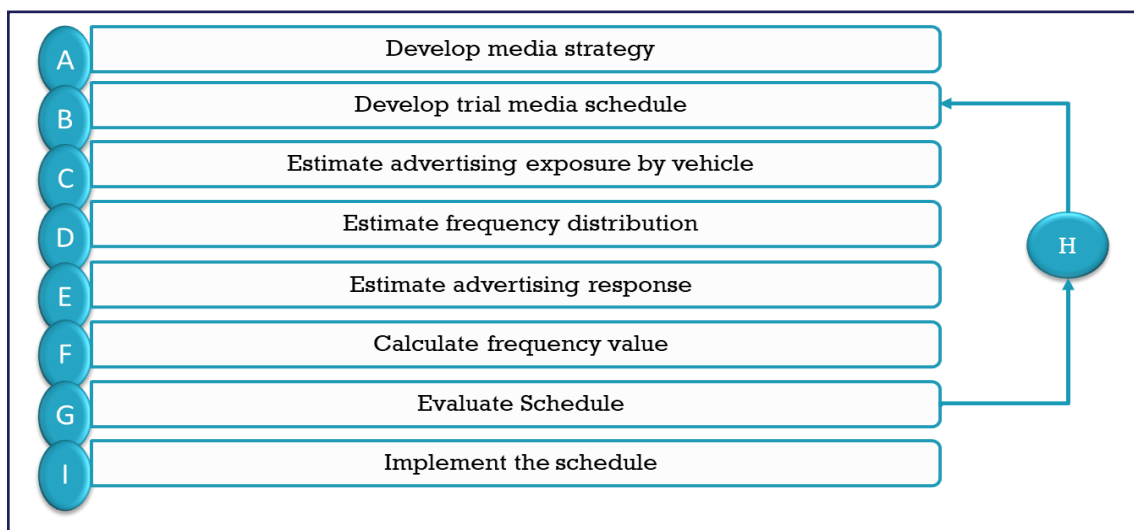


Figure 2-12: The Frequency Value Planning process (FVP) (Cannon, 2001, p.30)

The Frequency Value Planning process (FVP), as outlined in Figure 2-12, encourages planners to develop trial media schedules, with estimate reach and frequency values, to identify the optimum schedule which is then implemented. This presumes that the impacts can be modelled reliably and will remain relatively constant in the near future, thereby facilitating this type of deductive and prescriptive forecasting and scheduling.

It is interesting to note with all of these models, there is a presumption that the media impact can be modelled with sufficient confidence to be able to identify reliable alternatives that will deliver the objectives in the most cost-efficient and effective way. Also, the implementational recommendations are final, with the campaigns being planned and then implemented. The evaluation takes place after the campaign is completed, using a variety of models and concepts to assess how the media may have contributed to the success or not of the activity.

In 2007, Barker proposed the simple practitioner-oriented media planners' process model, shown in Figure 2-13. This aimed to assist with the integration of siloed planning strands and signalling a more iterative style of planning that was being seen around direct response and digital media. Reflecting Barban, *et al*, (1993) and Cannon (2001), the model was underpinned by solid IMC principles (Jenkinson 2003, Schultz 2003, Kitchen *et al*. 2004) but distinguished between the more strategic inter-media decision making steps of the media strategy formation and the tactical intra-media decisions taken at the scheduling stage. Within this model, background research and client/agency briefing were implicit, in that the media planning process happened after media planners had received a full briefing on the client's marketing plans, as recommended in the IPA's client briefing research (IPA and CAF 2004).

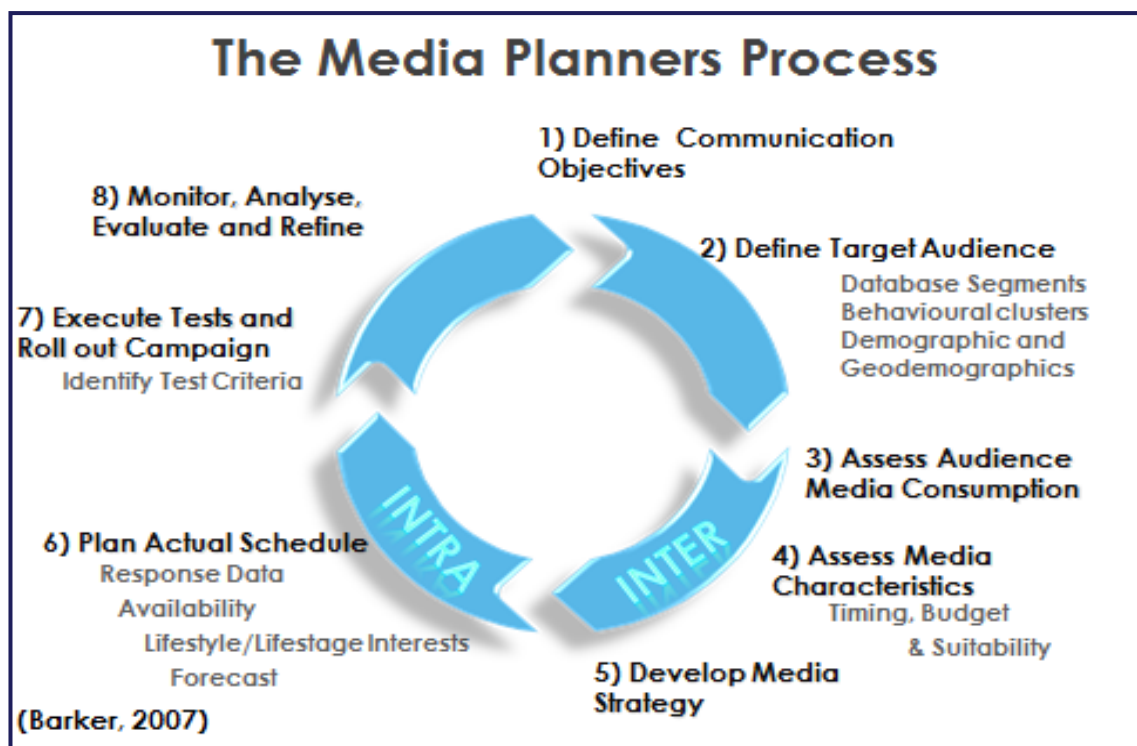


Figure 2-13: Media Planners Process Model (Barker, 2007, p5.11 - 5)

The key difference between the former models and Barker's process is that it overtly considered the audience media consumption alongside the characteristics of the media in the inter-media selection stage. In this way, it is less prescriptive about the role any single media channel might have and guides the planner to judge the suitability of the selected channels through assessment of multiple criteria, including audience media consumption and whether the media characteristics are suitable to convey the information and tell the story to deliver the objectives within the required timing and budget.

The tactical intra-media decisions are also described in terms of test and roll-out concepts, with monitoring, analysis, and evaluation being explicit within the implementation. This recognises that data is being collected during the deployment of the activity which can be used to refine some of the tactics as they roll-out. This identifies that the initial schedule may be updated as it progresses to refine and improve its contribution to the outcomes through layers of testing and evaluation.

More recently Arul (2013) proposed a slightly modified media planning process chart, as shown in Figure 2-14 below. His process emphasises the initial briefing and information analysis.

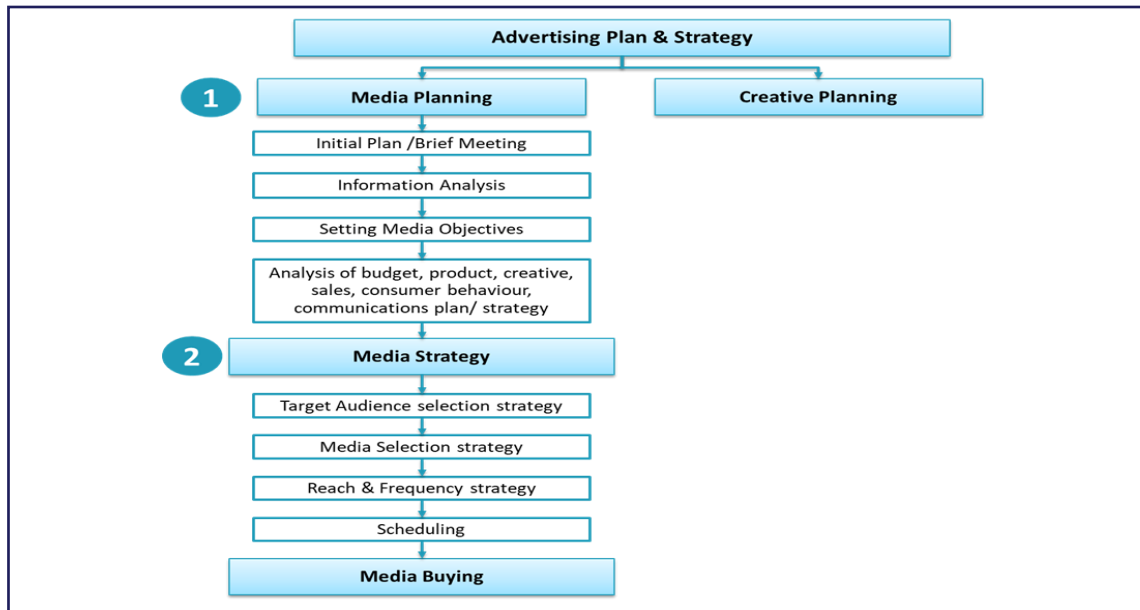


Figure 2-14: Media Planning and Implementation (Arul 2013, p.46)

In the supporting narrative, Arul (2013) highlights the importance of formally evaluating the current state, progress or growth of the brand and its market structure, in the light of the brand intentions for the period under review. This echoes Barban, *et al* (1993), Donnelly (1996) and Cannon (2001) as it emphasises the need to draw on the marketing underpinning and establish objectives before the media strategy can be considered. It is also similar to Cannon (2001) in its placement of the scheduling as a part of the strategy process, before implementing the media buying. However, this model suggests a linear process rather than the more iterative processes identified by (Barker 2007).

Smith & Chaffey (2013) have also proposed several models to help structure direct and digital marketing spend where the key measures are more behaviourally oriented, such as sales activation. Their overarching approach to planning is presented in the SOSTAC model, developed by Smith (2011) as shown in Figure 2-15.

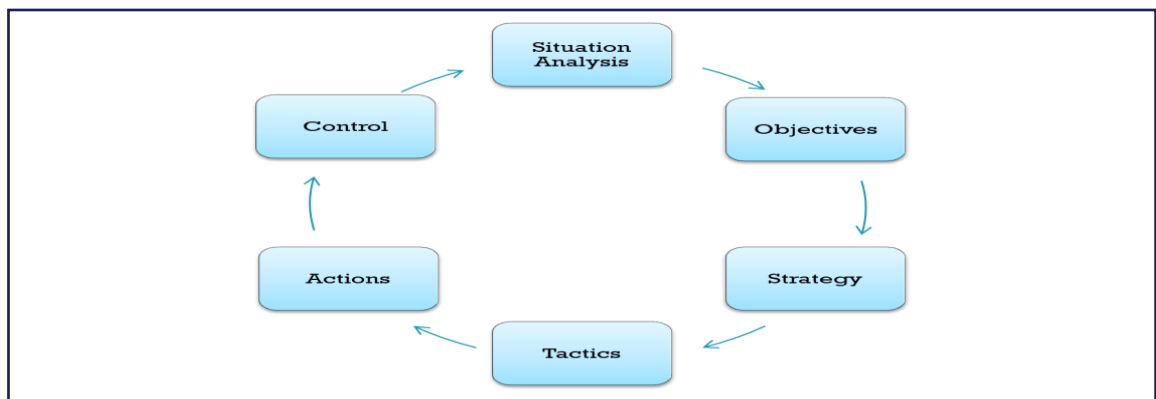


Figure 2-15: The SOSTAC Planning System (Smith & Chaffey, 2013, p. 4)

This model is designed to guide the overall marketing planning process and is not specific to media planning but has been adopted by many digital marketing planners as a summary of the overall marketing, creative and media process.

The situation analysis is explicitly nested within the model and auxiliary comments point to the marketing plan as being a key source of data for this. It offers a clear distinction between the overall strategy and implementational tactics. This can be overlaid against the requirements within media planning for a clear distinction between media strategy and intra media optimisation. In many versions, it also includes reverse arrows to indicate that data and information identified at the control stage can be fed back into the objectives, strategies and tactics.

The model proposed by Young (2014) is focused solely on the brand media strategy making stage, with the aim of providing a broad framework to steer the planning. He notes that in practical terms such frameworks are often supported with a proprietary communication planning system, which may be updated or “refreshed” every few years to maintain modernity.

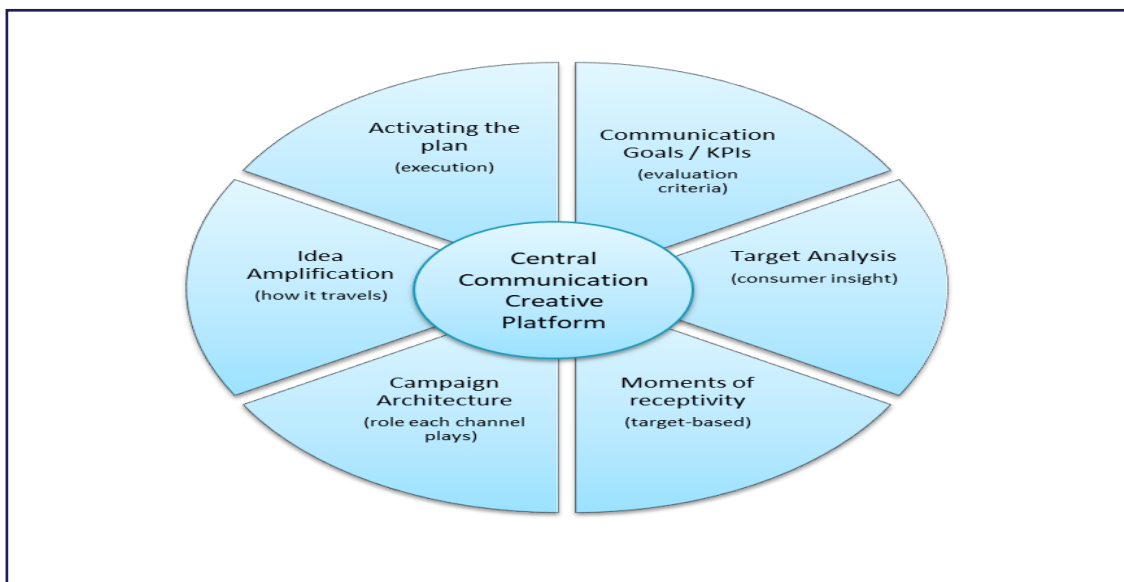


Figure 2-16: Brand Media Strategy Wheel (Young, 2014, p 28)

Young’s process, outlined in Figure 2-16, is designed to create a communication platform that will work in synergy with creative by outlining the fundamental touchpoint recommendations and how they can be amplified, executed and measured. The focus is on business and communication outcomes rather than outputs, and supporting this framework, Young is one of the few authors who deliberates on what the concept of strategy should mean to the media planner. He suggests that it should, firstly, entail creating a unique and valuable position, with the emphasis upon unique. Secondly, that it is about trade-offs, identifying both what to do and what not to do. Thirdly, reaffirming the principles of IMC, Young notes that strategy should involve “*creating a fit among your activity*” (ibid, p. 35). Echoing earlier authors, Young also highlights that good communication planners need to have expertise in developing consumer insights, and must be digitally proficient whilst also understanding the complexities of the wider multi-channel palette. Here he specifically identifies that being

media neutral means deploying a “vast choice of channels” which can include anything from one-to-one, experiential, point of purchase, to point of consumption media (*ibid*, p. 36).

Katz (2019), Senior Vice President and Global Research Director at Publicis Groups, is the most current author in the media planning arena. She does not offer an overarching framework but positions media planning squarely within the marketing process, as shown in Figure 2-17. In doing so, this builds on the earlier work, confirming that, by understanding the marketing objectives, the media planner can visualise how they can contribute to achieving the objectives and how their strategies will “affect the target audience, communication used, and media selected” (*ibid*, p.37).



Figure 2-17: Moving Towards the Media Plan (Katz, 2019 p.12)

Reflecting Young’s work, Katz confirms that to be able to interpret the most appropriate strategy the modern media planner must understand not only marketing, markets and brand behaviour, but also consumer decision making and how consumers respond to communication. This is a much broader set of considerations than the original requirement to just schedule media cost-effectively and demonstrates how the media strategy and planning role has changed over the last few decades.

Models such as these attempt to clarify the steps in the strategy-making process within the increasingly complex world of media. They position media planning as a part of the marketing communication delivery process rather than an auxiliary implementational service. To achieve this, the emphasis is on understanding an increasingly broad range of data across the fields of marketing, branding, communication and consumer behaviour, to ensure that the media planner can develop strategies that effectively connect the consumer to the brand, product or services in a manner that ultimately delivers the organisations marketing goals. Many of the older models articulate the principle of evaluating and assessing alternative scheduling options before putting forward the optimal solution for implementation. The more recent models create a greater separation between the strategy making aspect and the implementation. They also acknowledge that within the implementation stage, tracking and evaluation of data is an integral part of the process, leading to rapid iteration of executional elements as they are rolled out.

2.6: Discussion and conclusions

The literature demonstrates that the digital environment has brought about many changes in both media option and consumer behaviour over the last few decades and will continue to offer a complex and turbulent marketplace for advertisers and marketers alike. In tandem

with the increased complexity seen in the media environment, there has been an elevation of the media planning craft. The media strategist now plays a central role in communication planning, particularly in the identification of how to reach, interact and influence the audience in this complex world. To get to the right audience and deliver this success, media strategists need to understand the client's marketing objectives and be able to demonstrate how their media proposals will help achieve them. Katz (2019) emphasizes that the media strategy is not about "summarising tactics" but "iterating how you will achieve the client's objectives" (p. 36) and ensuring that everything in the media plan is coordinated with the marketing strategy to:

"reaffirm and clarify the goals of your complete advertising program to ensure that media objectives fit with the goals set in the brands marketing objectives" (ibid, p. 35).

In relation to the research questions, it is clear that several overarching framework models have been developed to guide the media planning process. The simple flow diagram proposed by Sissors and Petray (1976) was one of the first to reflect the elevation of media from being predominantly media optimisation and buying, to have a more strategic role. Their model identifies the media strategy stage, placing it before the inter-media and intra-media selection aspects. Building on this both Barban, *et al.*, (1993) and Cannon (2001) developed frameworks which emphasised the need for media planning to be nested within the marketing plan. In addition, to help support IMC and overcome the siloed working patterns that had developed, they stress that media planners should be cognisant of the hierarchical link from organisational and marketing goals through to the marketing communication and advertising objectives before defining the media strategy (Cannon 2001). Barker's process model was also designed to assist with the integration of such siloed planning strands, but signalling the growing iterative nature of media planning.

Such models established that media planning should be seen as a component of the overall marketing plan and attempted to clarify the process steps required within the increasingly complex world of media. A notable similarity across the earlier models is the fact that the media strategy aspect is seen to encompass the evaluation and assessment of scheduling options, with the optimal solution being put forward as the recommendation for the media buyers to deliver. Overall, these frameworks suggest a strongly intentional and rational strategy-making approach, in which the environment is assessed objectively, and assumed to be known and predictable, by using a wide range of internal and external background data, to evaluate, identify and prescribe the optimal media schedule to deliver the marketing goals (Barban *et al.* 1993, Stacey 1995, Donnelly 1996, Broadbent 1999, Sissors and Baron 2010, Katz 2019). The more recent models, particularly that proposed by Young (2014) elevates strategy further and clearly separates it from any aspect of implementation. Young's interpretation of brand media strategy is grounded in the orchestration of insight driven consumer centric channel choices which drive unique brand-oriented solution. For Young, optimisation has become something that is considered at the execution and implementation stage, not the strategy making stage.

The frameworks explored here highlight the importance of media planning being grounded within the core marketing plan, but also show that planners need to understand

advertising, communications and consumer behaviour to ensure they can interpret data meaningfully and develop the most effective media strategy.

To understand how these factors influence the media strategy decision making process these topics are explored in more detail in Chapters 4 and 5. In addition, it is evident that, with the exception of Young (2014), there is little reflection within this literature on what strategy making may or may not be, consequently, this is explored next in Chapter 3.

Chapter 3: Strategy Making Theory

3.1: Introduction

As shown in Chapter 2, both the media planning profession and related media planning models have developed to identify a clear media strategy making stage, however, there is no clear debate around what strategy actually is. Reassuringly though, Jofre (2011) states that a person can be a good strategist without knowing what strategy is because it “*is not an exact science nor a defined tool or skill for itself*” suggesting that it is “*an abstract attribute of the intricate human cognition*” driven by our individual characteristics (*ibid*, p. 1). Reflecting this, Chamberlain (2010 p. 12), notes that strategy is a social construct with no physical form, therefore, is “*just what people want to make of it*”. It is therefore difficult to identify or to test, and as a consequence, it can be applied to anything from major organisational forward planning to vague organisational job titles and slogans (*ibid*).

Therefore, in order to help understand what is meant by the concept of strategy making, this chapter explores the general theories of strategy making as articulated within the field of strategic management, as distinct from any other area, such as medicine or psychology, although as Lampel, Mintzberg, Quinn, & Ghoshal (2013) suggest, such academic distinctions in theory often turn out to be simple differences of perception. However, even with this focus, the strategy literature is divided into numerous streams, such as strategy as a field of theory, strategy as a process, and strategy as practice, each of which is rich with discussion about the many nuances that have been considered. As a result, I have started with some of the foundational literature from the field of management and business to help define what strategy may be. I have then explored how it has evolved over the 20th and 21st century to identify if there are any parallels that can be drawn with the developments seen in media strategy making.

3.2: Theories of strategic planning

Lampel *et al.*, (2013), prominent authors in the area of strategic management, remind us that etymologically strategy is derived from the ancient Greek word “*strathgia*”, meaning the art of generalship, of leadership and deliberating, devising and carrying out a military campaign, with its origins in battle strategy and warfare. They outline at length the strategies and plans undertaken by Alexander when he was seeking to rid Macedonia of the influence of the Greek city-states and establish dominance over what was then essentially northern Greece, suggesting that these military-diplomatic strategies provide “*essential insights into the basic dimensions, nature and design of formal strategies*” (p. 5). They conclude that strategy making is about planning, as identified in their core definition:

“ [Strategy is] the pattern or plan that integrates an organisation's major goals, policies and programs into a cohesive whole ” (ibid 2013, p. 10)

To help interpret this, it is useful to capture the meaning attributed to the key terms of goals, policies and programmes. In summary, ‘Goals’ set out what is to be achieved and when, but not how; ‘Policies’ are the rules or guidelines that guide formation and implementation;

and 'Programmes' are the step-by-step sequence of actions necessary to achieve the goals, as outlined in Figure 3-1 below.

<p>Definition of Goals</p> <p>Goals state what is to be achieved and when results are to be accomplished. They do not state how they are to be achieved. They may range from organisational objectives, establishing the nature and direction of the enterprise, through to a series of less permanent goals defining targets for organisational units. Strategic goals are major goals that affect the entity's overall direction and viability. Simon (1964) differentiates organisational goals by clarifying that they are the "goals of firms' owners, top management or legal authority" (ibid, p. 2) concerned with discovering courses of action that satisfy a whole set of constraints (ibid, p. 22).</p>
<p>Definition of Policies</p> <p>Policies are rules/guidelines that express the limits within which action should occur. Policies exist within the hierarchy of organisations. Strategic policies are major policies that guide entity's overall direction and generally the highest decision domain concerns policy making.</p>
<p>Definition of Programs</p> <p>Programs specify step-by-step sequence of actions necessary to achieve major objectives, and how those objectives are to be achieved within limits set by policy. They ensure resources are committed to achieving goals and establish mechanisms against which to measure progress. Logically, those that determine the overall direction and viability are called strategic programs.</p>

Figure 3-1: Definitions of key terms within strategy-making (adapted from Mintzberg and Quinn 1995, Lampel et al. 2013)

Expanding on this, they suggest that a well-formulated strategy helps to marshal and allocate an organisation's resources into a unique and viable posture based on its relative internal competencies and shortcomings, anticipated changes in the environment and contingent moves by intelligent opponents. This identifies two further aspects of strategy. The principle of an opponent or competition, along with the ability to respond to the changing environment. In the context of business and corporations therefore, the strategy is not just about the theoretical plan, but is a process whereby formulation and implementation are intertwined in a complex integrated process, in which "organisational structure and processes influence and constrain the formulation of strategy" (ibid, p. 74).

Mintzberg & Quinn, (1995) highlight the circular nature of strategy, stating that strategic decisions determine the overall direction of an enterprise and its ultimate viability in the light of the predictable, the unpredictable, and the unknowable. In so doing, strategies shape the goals of the enterprise and determine its effectiveness by delineating the broad limits within which the "entity will operate and what resources will be allocated for each task" (ibid, p. 4). Essentially, strategy shapes goals, and vice-versa, as displayed in Figure 3-2 overleaf.

Johnson, Whittington, Scholes, Angwin, & Regnér (2013) concur that strategy is about identifying key issues for the future of the organisation and define strategy as being the long-term direction of an organisation. In fact, they state that:

"Strategy is the direction and scope of an organisation over the long term, which achieves advantage for the organisation through the configuration of resources, in a changing environment, to meet the needs of the market and to fulfil stakeholder expectations" (p. 10).

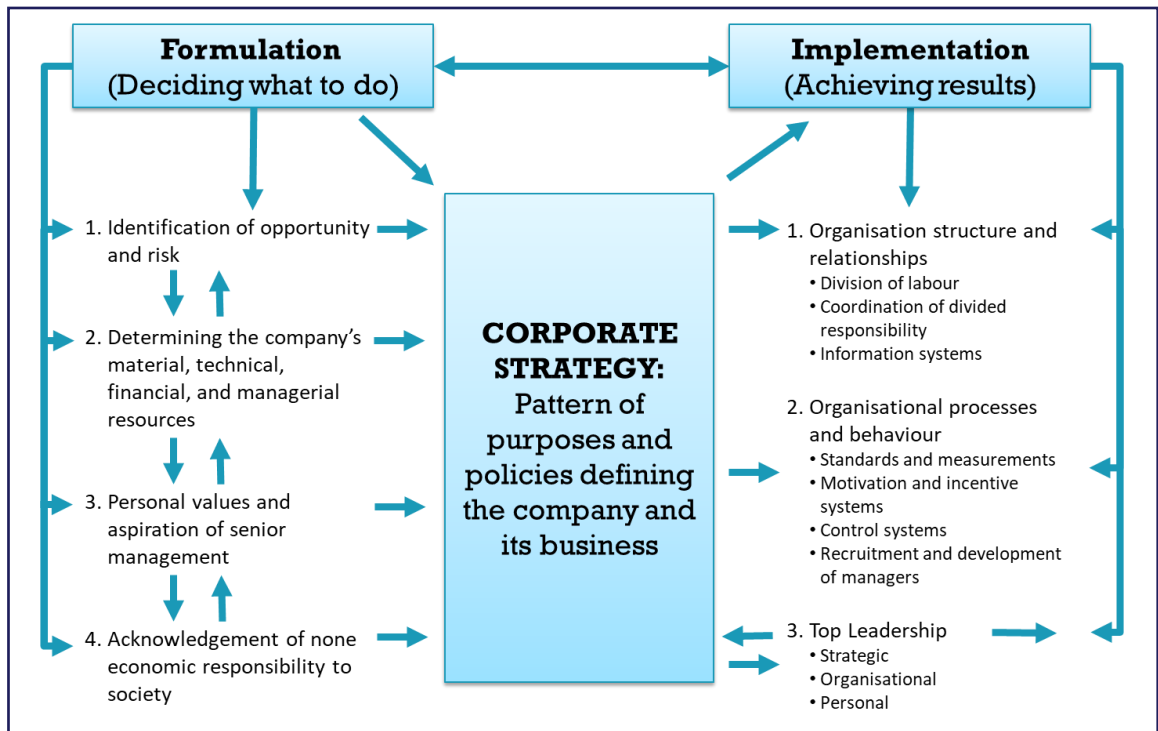


Figure 3-2: Strategy formulation and implementation (Mintzberg & Quinn, 1995 p. 49)

This is a broad and useful definition for drawing in many of the elements that need to be considered and echoes prominent earlier authors, such as Ansoff (1957, 1965) and Chandler (1969), who identify that strategic planning involves the articulation of long-term goals and the allocation of the resources necessary to achieve those goals.

Faulkner (2002) states that these initial directions for business strategy can be traced back to the principles of economics and business policy. He concludes that strategising in this way is essentially the result of careful, deductive thought, characterised as the ‘rational approach’.

This is summarised within the theory of strategic choice, whereby the decision process is seen to be initiated and driven by the most senior leader or leadership team, who formulate strongly rational strategies and prescriptive programmes. The rational approach is underpinned by an ontological objectivity, or realist stance, in which it is assumed that the environment can be assessed objectively as it is ‘known and predictable’ (*ibid*, p. 5). This also assumes that extensive analysis will allow the ‘rational actors’ to design the optimal solution to ensure organisational survival (Porter 1980, Stacey 2007, Stacey and Mowles 2016). Strategic choice theory emphasised that organisations do not just exist, but are led by, the choices and decision of individuals and groups within them, who respond and adapt to the internal and external environments, and as noted above, is based upon a strongly rationalised approach.

Porter (1996) offered an alternative to looking at ‘*all of the available options*’ and recommended that organisations should be selecting from just a few choices through the principle of ‘*positioning*’ (p. 72). He points to the need to build competitive advantage and asserts that the essence of strategy is the activity of choosing to perform activities differently from, or to perform different activities to, your rivals. However, he counsels that sustainable

strategic positioning requires trade-offs because the environment changes and competitors reposition, or copy activities, and that without this flexibility, “a strategy is nothing more than a marketing slogan that will not withstand competition” (p. 64). He advocated that ‘fit’ drives both competitive advantage and sustainability, listing his three types of ‘fit’ as “simple consistency; activities that are reinforcing; and, activities that optimise effort” (p. 72). In particular, Porter’s generic strategies advise against getting ‘stuck in the middle’, with no definite strategy. His later updates added the guidance of three activity-based positions: access, variety and needs, as summarised in Figure 3-3.

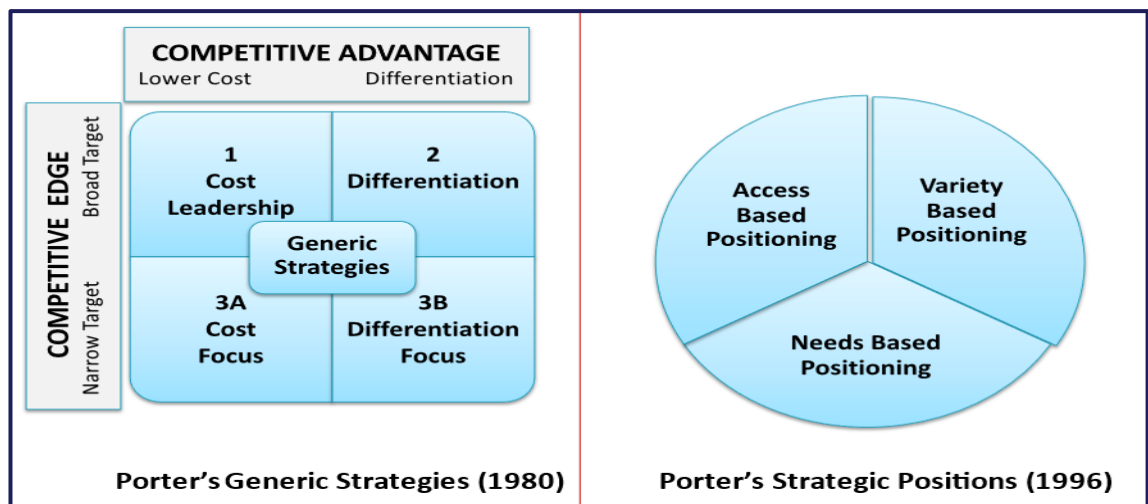


Figure 3-3: Strategy as Positioning (adapted from Porter 1980, 1996)

Importantly, he advised that positioning is of “greater importance in the long-run than short-term operational efficiencies” and concluded that strategic positions should have a time horizon of “a decade or more”, not of a single planning cycle (Porter 1996).

Porter’s contribution reflects the transition from strategy as long-term corporate planning to, what Grant (2018) refer to as, strategic management, where competitive advantage became one of the primary goals of strategy. This echoes Andrews, (1980, p. 30), who proposed that the strategy is a statement articulating the corporate purpose, which “differentiates the organisation in some way from all of its competitors” and stems from a perception of the present and future market opportunities. Andrews states that the strategy helps to utilise available resources to build distinctive competence and competitive advantage, together with the management’s personal aspirations and values. He offers that a “responsible and effective board” should require its management to produce a “unique and durable” corporate strategy, which is reviewed periodically “for its validity” and used as the reference point for all other board decisions (*ibid* p. 30). He also believes that corporate strategy accommodates what its management wants to do, reconciles its strengths to the market opportunity and outlines what it thinks is ethical, legal, and moral. This concept of strategy, therefore, involves “economic, social, and personal purposes” - not just financial objectives for growth and profit - and stands for the “essential character” of the company “worthy of the commitment of energetic and intelligent people” (*ibid* p. 32). However, Andrews is at pains to highlight that many Chief Executives reject the practicalities of a conscious strategy, “presiding over unstated incremental, or intuitive strategies” that have never been

articulated or analysed (*ibid*, p. 30). To overcome this, he offers a number of reasons why a strategy is important, as outlined in Figure 3-4.

- The board needs specific evidence that its management has a process for developing, considering and choosing among strategic alternatives
- Knowledge of strategy makes an intelligent overview feasible
- Provides a reference point for separate decisions and enables assessment of the impact on overall strategy and prevent straying from the strategic course.
- Allows for continuous evaluation of management, stating that short term measures are unsatisfactory for evaluation because short term return and long-term investment can only be evaluated over several years.

Figure 3-4: Reasons why strategy is important (Andrews 1980, p.42)

However, Hamel & Prahalad (1985, 1993, 1990) contested much of this prescriptive thinking, particularly the concepts of fit, allocation of resources and long-term perspective; three elements regularly recommended in the Western academic strategic management literature. They felt these elements were in some way unbalanced and suggested an alternative frame in which the concept of ‘stretch’ supplements the idea of fit; that ‘leveraging resources’ was as important as allocating them, and that long-term success has as much to do with “consistency of effort and purpose, as it does with patient money” (p. 77). In addition, when looking at the demise of some of Western corporations in the face of Japanese competition, they noted that “core competency building was more prevalent in the Eastern approach to business” (p. 78), stating that Western organisations could benefit from adding this thinking to their strategy formulation. The authors argued that successful firms develop and then strengthen a small set of core competencies which lie at the centre of their ability to grow and profit. These competencies should aim to benefit the consumer and facilitate access to a wide variety of markets but be difficult for competitors to replicate. Organisations therefore need to identify which competencies to focus on and improve, and which to outsource or avoid. They also suggest that managers should “countenance risk and uncertainty” in the pursuit of strategic objectives and need to have an “appetite for risk” if they are to build competitive advantage (*ibid* p.78). These themes are summarised in Figure 3-5.

- A strategic architecture that guides competency building
- The concept of fit, or relationship between the company and its competitive environment
- The concept of ‘stretch’, as opposed to just ‘fit, and in so doing, building new competencies
- The allocation of resources among competing investment opportunities
- Leveraging, borrowing, blending, balancing and recycling resources, not just allocating them
- A long-term perspective where ‘patient money’ is prominent, but embraces incrementalism
- Focus: a clear strategic intent, on which the efforts of individuals/functions converge over time
- Countenance risk and uncertainty to build competitive advantage

Figure 3-5: Strategy as Stretch (Hamel & Prahalad, 1990, p. 91; 1993, p. 84)

This thinking moved the discussion on from the concept of strategy as deductive rational evaluation and prescriptive planning and “turned traditional thinking upside down” (Mintzberg, Ahlstrand, & Lampel, 2005, p. 5).

So, looking at the early theories from the foundational literature a number of themes emerge. These indicate that effective strategies contain three elements: the important goals to be achieved, the significant policies guiding or limiting the actions, and the outline of the major action sequence (programmes) designed to accomplish the defined goals within the limits. But these suggest that strategy is not merely the generation of programmes to meet the goals but that effective strategies develop around a few key concepts which give them cohesion, balance and focus to gain competitive advantage. There is also the issue of ensuring that resources are allocated, or leveraged, across all the steps that are necessary to succeed. This is important because not all parts of the journey might be as simple, attractive or cost-efficient as others, therefore the strategy should coordinate and control all actions to support the intended direction (Lampel *et al.* 2013). To support this, internal consistency is highlighted. As with military strategy, an organisation may have a number of hierarchically regulated and mutually supportive strategies, which Lampel *et al.*, (2013) assert “*must be complete in themselves, but still a cohesive element of a high-level strategy*” (p. 9).

However, it is clear that in reality, strategy deals with unpredictability and unknowability, and therefore, that strategy needs to build a strong, but flexible, direction for the organisation so that it can achieve its goals despite the unforeseen. As Barney (1991, p. 113) notes, “*formal strategic planning in itself is not likely to be a source of sustainable competitive advantage*”, although it can enable an organisation to recognise and exploit its resources accordingly. Adding to this, Liebeskind (1996) identifies that advantage is now more likely to be determined through knowledge, rather than by access to, or organisation of, raw materials and cheap labour. She asserts that in the knowledge economy, knowledge protection is as critical as innovation, and in fact highlights the rise of industrial espionage activities. Therefore, security and protective organisational arrangements are seen as an additional dimension to sustainable competitive advantage in the global context.

More recently, Grant (2018) focuses his discussion of strategy on success, a parameter rarely mentioned in earlier discussions. The characteristics or ingredients of successful strategy include having goals that are simple, consistent and long term, which are based upon a solid understanding of the competitive environment, objective appraisal of resources, and effective implementation, as outlined in Figure 3-6.



Figure 3-6: Criteria for Effective Strategies (Grant 2018, p. 9)

Much of this resonates with the foundational literature but, in contrast to Porter (1996) and other earlier work, success is made explicit within more recent definitions, and there is a clear statement of the fact that the strategy is there to deliver success and requires operational effectiveness within its implementation to achieve this. In earlier literature, success was more implicit, through the suggestion of opponents and competition, but the emphasis was on identifying objectives and exploring the various policies and programmes that formed the strategy.

In summary, it would appear that a well-formed strategy should encompass a wide number of criteria, as outlined in Figure 3-7. Firstly, there is clear consideration given to the preparation required to develop a strategy and, as Grant (2018) states, a strategy should be underpinned with a clear understanding of the competitive environment. Secondly, numerous authors share the opinion that it is important to establish clear goals, or objectives, for the strategy, outlining what is expected from the strategy.

Clarity	Degree of Risk
Clear decisive objectives	Workability
Time horizon	Flexibility
Coordinated and committed leadership	Strategic positioning
Motivational impact	Cost leadership, Focus or Differentiation
Matched to personal values of key figures	Positioning via Access, Needs or Variety
Internal consistency of purpose	Competency Building
Compatibility with the environment	Differentiation
Economic, social and personal purpose	Competitive Advantage
Determine the course of events	Security & Protective arrangements
Maintains the initiative	Focus/ Concentration on distinctive competency
Appropriateness/fit, in light of resources	Rationality
Allocation or Stretch of resources	

Figure 3-7: Summary of Common Elements of Successful Strategy

In addition, many stress the need for these to be long terms goals, as the essence of strategic planning is to guide the long-term future of the organisation (Porter 1996, Lampel *et al.* 2013, Grant 2018). Guidance is also offered that strategies should be designed to help differentiate the organisation and create a strategic positioning that is simultaneously compatible with the environment and appropriate to the organisations economic, social and personal purpose within the available resources. There is also an increasing emphasis on the need to be flexible in the implementation of the plan, whilst incorporating an element of stretch, but being guided by a clear assessment of the degree of risk (Hamel and Prahalad 1985, 1993, Prahalad and Hamel 1990).

Ontology within strategy making

These foundational aspects of strategy making are described by many authors as being representative of, firstly, the Design School, then the Planning School, and finally, with Porter's intervention, the Positioning School (Lampel *et al.* 2013, Grant 2018).

Collectively these are described as the rational models of strategy making and represent the dominant perspective, being underpinned by a common theme of rationality (Hart 1992). The common elements of this type of strategy making suggest a formal, strategic planning

system, where explicit goals are set (Lampel *et al.* 2013, Grant 2018). This, in turn, must be supported with systematic environmental analysis and extensive analysis of internal strengths and weaknesses prior to decision making, so that all of the possible alternatives and consequences can be reviewed in relation to the goals set and the most valuable solution selected (Hart 1992, p. 328), or, in the case of the Positioning School, assessment of one or two choices that best suit the organisation and its capabilities, to deliver continued competitive advantage and ultimately growth and profit for the leaders and stakeholders.

The Design School process presumes that the strategy-making is undertaken by the key organisational actors, such as the Chief Executive Officer (CEO) or chief strategist. These are the thinkers, and their formulation of strategy is made explicit, to drive future actions. They hold the power and the organisational structure will follow the strategy (Chandler 1969). Within the Design School, the conception of strategy is more important than, and separate from, the implementation. Similarly, within the Planning School strategy is a formal process where a team of planners and analysts will evaluate the appropriate options to be approved by the CEO; so again the thinkers are separated from the actors. Faulkner (2002) suggests that the strategy is decomposed into goals, objects, forecasts, checklists and budgets, with a strong focus on the numbers and controls, and represents a more technocratic approach.

The Positioning School represents the shift from looking at infinite possibilities to just a few feasible positions but is still characterised by the separation of thinking and actions, supported with hard quantitative data. To assess the possible positions, the positioning school takes a more outward-looking view, as seen with many of the supporting management tools, such as Porter's 5-forces (Porter 1996).

These approaches are seen to be prevalent within large organisations and corporations, but what of the small business led by a visionary entrepreneur?

Lampel, *et al.* (2013) suggest that entrepreneurs may shun extensive analysis and focus on growth and finding new opportunities, with bold decisions taken in the face of uncertainty. However, the direction is still enforced from the top down, to be implemented in accordance with the plan. Mintzberg *et al.* (1998) identified this as the Entrepreneurial School, representing a shift from prescriptive to descriptive planning, with reliance upon intuition, judgement and experience, rather than analysis:

“entrepreneurial strategy is both deliberate and emergent: deliberate in its broad lines and sense of direction, emergent in its details so that these can be adapted en route” (Mintzberg et al. 1998, p. 125)

Whichever form of strategy making process is in place, all of these 'schools' highlight the importance of the leader and decision maker. This in itself opens up questions of just how objective and rational the decision making can be. As Grant (2018) notes, individuals and organisations can at best make 'optimal' decisions, because people's decision analysis is subject to cognitive limitations that constrain all human beings. This concept is developed out of behavioural theory which argues against such assumptions of rationality and suggests that organisations can only achieve 'bounded rationality' (*ibid*). This concept, and how it affects organisations, their culture, their decision-making style and ultimately their approach to strategy, is developed further in the next section of this literature review.

Cognitive bias in strategy making

Within the context of a formal planning structure, Simon (1964) challenges the assumptions that exhaustive and comprehensive assessments can be made. He notes that in the scheme of perfect competition, there would be an almost '*unlimited sea of possible alternatives*' and suggests that the best that can be achieved is "*alternative generation*" and "*alternative testing*" (*ibid*, p. 7). As an organisational behaviourist, Simon also identifies the issues of how people enact their organisational role, as distinct to their personal motivations and background. He suggests for example, that a Chief Executive with a legal background is likely to interpret the available alternatives differently from one with an accounting background. Likewise, an authoritarian personality will behave differently from a more permissive person when in the same role. He also suggests that there is often limited commonality of goals across subdivisions of large organisations, leading to sub-goal formation and goal conflicts, rather than the hierarchically regulated and mutually supportive strategies suggested earlier in the strategy literature (Lampel *et al.*, 2013). This is an important consideration and suggests that individuals and organisations can achieve only bounded rationality (Simon 1964, 1989). Therefore, at an organisational level, strategic assumptions will often form the basis of the organisation's frame of reference, which will influence them to act in different ways (Hart, 1999). In fact, Hart (1999) suggested that when individuals are making decisions, they will, in fact, adopt simplified models, relying on schema, or cognitive maps, to organise issues, and lean towards "*incrementality and satisficing*", based upon their need to organise issues and events into manageable sets, and adding to this, that goal setting can be politically motivated, leading to "*disjointed organisational processes*" (*ibid*, p. 328).

The use of such heuristics and bias in human judgement is discussed by many authors, particularly within the organisational development and behaviour literature. Biases and heuristics are seen as simplifying mechanisms for dealing with multiple problems that might otherwise be overwhelming, and some note that "*the use of heuristics may actually improve decision making*", particularly in the case of entrepreneurs (Busenitz & Barney, 1997 p. 25; Kahneman & Tversky, 1972; Tversky & Kahneman, 1981). Busenitz & Barney (1997) speculated that without the use of biases and heuristics, many entrepreneurial decisions would never be made, and the window of opportunity could be gone by the time all the necessary information became available for more rational decision-making. Their study into the differences in decision making behaviour between entrepreneurs and managers of large organisation also led them to surmise that the cognitive biases seen in entrepreneurs may be beneficial in some circumstances, such as start-up, but may also explain why they sometimes make bad managers and may lead to the demise of a business as firms mature.

Likewise, Chamberlain (2010) looked at cognitive bias to identify change readiness, which he believed had an indirect impact on the strategies that leaders or managers would choose. He found that some strategists were happy to accept major change whilst others were more reluctant. Change readiness and acceptance of risk are therefore some of the traits that researchers have analysed to try to understand the role cognitive bias might play in strategy formation. Within the organisational environment, these aspects are generally debated under

the umbrella field of organisational culture, and its impact on strategy making is explored in greater detail here.

Organisational culture

Hofstede, *et al*, (2010) describe culture as the “collective programming of the mind” that distinguishes the members of one group or category of people from others (*ibid*, p. 6), Their research showed that there are a number of cultural characteristics which can make managers, and organisations, more, or less, risk-averse, including long-term orientation and change readiness (Hofstede 1984, Mooij and Hofstede 2010).

As a result, they proposed five polarising dimensions of country-specific organisational culture: power distance, uncertainty avoidance, individualism/ collectivism, masculinity and long-term/short term orientation, as outlined in Figure 3-8.

These characteristics would certainly have an impact on an individual’s cognitive bias towards risk and therefore influence the types of strategies developed.

Power distance	Represents the degree of a culture’s acceptance of inequality among its members.
Individualism and collectivism	Represent a culture’s main focus, being either the importance of the individual or the Group.
Masculinity and femininity	Represents the stereotypical characteristics of men and women as being the dominant cultural values.
Uncertainty avoidance	Represents the collective tolerance for ambiguity in a culture
Confucian Dynamism / long-term orientation	Measures the preferences of a culture for a long-term and traditional view of time.

Figure 3-8: Hofstede’s Dimensions of Culture (adapted from Hofstede, 1984; Hofstede & Bond, 1988; Hofstede, Hofstede, & Minkov, 2010)

There are however competing views and other ‘dimensions’ that have been proposed to shed light on how national and individual traits can combine to produce variations in organisational culture.

Kirton, (1976) provided a much-simplified typology. Citing Drucker’s ‘The Age of Discontinuity’ (1969) as inspiration, he identifies a continuum of contrasting characteristics ranging from “an ability to do things better, to an ability to do things differently” (Kirton, 1976 p. 622). He labelled those who were change-conservative as ‘adaptors’ - being generally biased towards low risk in progress, concentrating on the near-term issues, addressing threats and opportunities only when they become clearly visible, with a desire for stability and supporting existing paradigms. He called those who preferred discontinuous change, ‘innovators’ - being biased towards change and ready to accept risk, threaten existing paradigms. His research unveiled a useful list of managerial characteristics that demonstrate the differences between these two extremes, as articulated in Figure 3-9 overleaf.

QUALITATIVE CHARACTERISTICS	
ADAPTORS	INNOVATORS
<ul style="list-style-type: none"> - Precise, reliable, prudent, efficient, disciplined, conformity, methodical - Prefers to resolve problems, not find them - Seeks solutions in tried & understood ways - Reduces problems by improvement and - Drives greater efficiency to maximise continuity & stability - Seen as sound, conforming, safe, dependable. - Liable to make goals of means - Seems impervious to boredom, able to maintain high accuracy in long spells of detailed work - Is an authority within given structure - Challenges rules rarely, cautiously, when assured of strong support - Tends to high self-doubt. Reacts to criticism by closer outward conformity. Vulnerable to social pressure, authority and compliant - Focus on function of institution at all times. - Supplies stability, order and continuity when collaborating with innovators - Sensitive to people; maintains group cohesion and cooperation - Provides safe base for innovator's riskier operations 	<ul style="list-style-type: none"> - Seen as undisciplined, thinking tangentially, approaching tasks from unsuspected angles - Seeks to discover problems and new solution - Queries problems' concomitant assumptions; manipulates problems - Is catalyst in groups, irreverent of consensual views; seen as abrasive, creating dissonance - Seen as unsound, impractical; often shocks - Low regard for accepted norm when pursuing goals - Capable of detailed routine work for only short bursts. Quick to delegate routine tasks - Tends to take control in unstructured situations - Often challenges rules, little respect for custom - Shows low self-doubt when generating ideas, not needing consensus in face of opposition - Is ideal in unscheduled crises, or better still to help to avoid them, if can be controlled - When collaborating with adaptors: supplies task orientations, breaks with past and accepted theory - Insensitive to people, often threatens group cohesion and cooperation - Provides dynamic to bring about periodic radical change, without which institutions tend to ossify

Figure 3-9: Typology of Decision Making (adapted from Kirton 1976, Kirton 2003)

Given these variations, Adaptive and Innovative strategists are likely to act and think in different ways and will certainly view situational and environmental alternatives differently. This will shape the types of strategies and solutions that are recommended for business growth, in particular, whether the organisation experiments with new alternatives through 'Exploration', or supplements existing alternatives through 'Exploitation' (March 1991, Neill 2009). As a result, a number of other models have been proposed that also try to evaluate and explain organisational culture. These include:

- The Competing Values Model (CVM) from Quinn & Rohrbaugh (1983) evaluates how the leadership approach to organisational structure and environmental focus creates very different cultures, ranging from the bureaucratic hierarchical cultures and rational goal oriented cultures through to more participative and consensus building clan cultures and highly flexible innovation cultures (see Appendix 12-1, p.225).
- The Typology for Organisational Analysis from Hampden-Turner and Trompenaars (1993, 2000) identifying Universalist societies (*who follow rules, expect conformity and uphold their standards*) and Particularist societies (*who believe circumstances can outweigh general rules*). They proposed a typology along two dimensions: a) egalitarian versus hierarchical, and b) people versus task, to develop four basic types designed to help managers develop cross-cultural competencies when doing business across the world (see Appendix 12-2, p. 226).
- The dimensions created by Handy (1999) propose the existence of four varieties of organisation culture: power culture, role culture, task culture and person culture.

- Schneider's (2000) Cultural Analysis Model (CAM) points to four core cultures: control; collaboration; competence and cultivation and provides further dimensions against which to evaluate strategists and their motivations to formulating strategy (see Appendix 12-3, p.227).

Synthesising these typologies demonstrates that they share many common themes. They contrast internal stability with external uncertainty and suggest that those with an emphasis on internal stability are more hierarchical and bureaucratic, whilst those focused on external uncertainty are less so, echoing Kitron's Adaptors. Del Prá Netto Machado and Carvaiho (2008, p. 28) proposed integrated axes around 'shared versus concentrated power', and 'personal versus functional managerial style', however, whilst offering a simplified dimensional analysis to evaluate managerial constraints upon strategy making, it appears to blur the clarity and definitions offered by former authors, in particular, the situational aspect identified by Hampden-Turner and Trompenaars. Typology for Organisational Analysis (1996) more arcing assessment suggests that such cultures may be '*context dependent*' (p. 152) and that behaviour can change in different situations, a facet echoed by Neill (2009) who suggested that both situational and environmental forces influence the way in which strategy making is enacted. Most importantly by looking at the cultural aspect of organisational group influence, it can be seen that, as identified by Simon (1990), if individuals and organizations are cognitively biased in different ways, then they are likely to make fundamentally different strategic choices. Therefore the varying perceptions of executives performs an important function in the allocation of attention and how the firm interacts with its environment (Gavetti and Levinthal 2000, 2004) which may represent a source of sustained difference between firms and individuals, and therefore a sustained competitive advantage or competitive disadvantage (Barney, 1991, Busenitz & Barney, 1997).

As Chamberlain, (2010, p. 70) notes, a strategy will be influenced by the "*organisations underlying purpose*" and by "*the direction imposed by members or owners who guide the entity*", suggesting that decisions can be imposed or enforced by the strategist or those with control over the strategist. For this, he points not only to the role of boards and policymakers but also to the positions and actions of employers, customers, competitors, suppliers and regulators, with conflicting agendas.

Both the strategy and organisational behaviour literature, therefore, suggests a less rational role for leaders and their organisations. It challenges both the cognitive and motivational assumptions and points to the fact that strategic decisions can be non-rational in many different ways. Strategy is made and influenced by human actors and therefore is the product, not only of the input data that can be evaluated from the environment, but also of the culture, motivations and cognitive processes, or cognitive bias, of those making the decisions and the way in which the data is analysed and evaluated to produce the decision.

Regner (2003) however argues that much of this nuanced behaviour is lost in the strategy literature which, in his view, aggregates much of the culture, politics and cognitive biases involved in strategy making. He states that although strategy-making involves a variety of actors and contextual influences, the literature tends not to pay attention to the micro-level

and the practices of the actors involved. To overcome this a number of authors have suggested that strategy in this context needs to be viewed not as a noun, but as a verb, around strategizing. For Whittington (2003) the point of privileging verbs over nouns was to re-envisage strategy and organisations as processes, rather than states, allowing strategic decision making and strategic change to be considered more clearly. In fact, he asserted that it is no longer possible to consider the strategy and organisation as distinct and separable, but that there is a strategy-organisation duality that needs to be considered, that strategy and organisation are fundamentally connected, and that people at all levels of the organisation may strategize in the face of internal and external forces, looking to gain advantage for themselves and for the organisation (*ibid*). Verbs are about doing and acting, rather than thinking, and therefore embraces the functional elements of implementation seen as people review and reflect and update their strategies. This more active dimension of strategy is seen as predominantly emergent (Mintzberg 2007), rather than the more prescriptive deliberate strategy making described earlier, and as an emergent strategy, it is imbued with learning.

Strategy therefore does not have to be about the rational formulation of a planned course of action but may unfold in different ways within different organisations, ranging from highly prescriptive, well planned and implemented strategies through to simple day to day micro-actions and reactions in response to the changing nature of the context and conditions surrounding an organisation, driven by the biases, heuristics and motivations of the individual actors involved as they navigate the complexities of the environment.

3.3: Classifications of strategy

Mintzberg, Ahlstrand, & Lampel, (1998) articulated all of these variations in their classification of the ten different schools of strategy, as shown in Figure 3-10.

1 The Design School	Strategy formation as process of conception
2 The Planning School	Strategy formation is a more detached and systematic formal process of formal planning
3 The Positioning School	Strategy formulation as analytical process; focused on selection of strategic position in economic marketplace
4 The Entrepreneurial School	Strategy formation is a visionary process
5 The Cognitive School	Strategy formation is a mental process
6 The Learning School	Strategy formation as an emergent process
7 The Power School	Strategy formation as process of negotiation
8 The Culture School	Strategy formation is a collective process
9 The Environmental School	Strategy formation as a reactive process
10 The Configuration School	Strategy formation of the process of transformation

Figure 3-10: The Schools of Strategy (Mintzberg *et al.* 1998, p.5)

The Planning, Design and Positioning schools discussed earlier represent a more deliberate and prescriptive approach. They are concerned with how strategies could or should be formed rather than how they necessarily are. These are underpinned by the focus on strategy formation as a planned and rational process, as articulated through the theory of

strategic choice. In terms of chronology these three also dominate the foundational literature from the 1960s through to the 1980s, moving from a focus on how strategy is developed, to one that prescribes the actual content of strategies, with the positioning school. School 4, the Entrepreneurial school also reflects a planned vision as discussed in section 3.2.

Schools 5-10 are more descriptive in nature and attempt to explain how strategies may be developed and consider different aspects of the process of strategy formation in relation to human actors. These also serve to demonstrate more clearly the changing nature of strategy, driven in part by the complexities and unpredictability of the technology environment.

Reflecting the concepts of bounded rationality and cognitive bias, the cognitive and learning schools are of particular interest. The Cognitive School seeks to capture the individual perspectives, or bias, in the form of experience, motivations and culture can influence what the strategist decides to do. Mumford (2015) highlights that in acknowledging cognition, it is necessary to accept the duality of objective and subjective views. The foundational literature was predicated by the assumption of objective thoroughness, but as Mumford notes, subjectivity often gives rise to recency bias, which results in new information outweighing old knowledge, and presumably reinforcing change. Accommodating this, the Cognitive School is intrinsically branched. The first approach is a positivist stance based upon an objective representation of the external world reality but recognises bias in individual cognition. The second is the non-positivist, subjective branch, taking a constructionist stance, and proposing that cognition is based on individual interpretation and constructions of the external reality. This recognises that strategies are shaped by the perspectives of people and how they deal with the data available to them.

In terms of information and experiences, the Learning School stresses that learning within strategy making is essential and, as outlined by many authors, both the Learning School and Action Learning disciplines share the same experience-based learning model and involve the more iterative processes found within emergent strategy making (Oliver 2008a, Oliver and Rowles 2008), although Jofre (2011, p. 70) states that over-emphasis on learning can lead to strategic drift, where people move away from the original strategy as they incorporate new and interesting knowledge. Emergence carries with it the emphasis of action. It encapsulates the principle of strategising and is about being open, flexible, responsive and, specifically, willing to learn. This is not about necessarily learning from textbooks but is about organisations learning from actions, reflections, habit and the creation of experience (Jarzabkowski 2005, Kaplan 2007, Oliver and Rowles 2008, Bochenek and Blili 2012, Chanyatipsakul and Wongsurawat 2013, Mumford 2015). This indicates some fluidity in the execution of strategies, particularly as results from one set of actions are fed back into the planning of the next steps. This ability to learn and iterate is important, particularly in a complex, unstable or competitive environment, and enables management to respond to the evolving reality and delegate control when necessary (Faulkner 2002, Stacey 2007, Stacey and Mowles 2016).

To support this, scenario planning is suggested as a way to reconcile the increased turbulence within the organisational environment and the need for some form of resource

preparation. Scenario planning acknowledges that no one set of strategic factors is likely to remain consistent and therefore creates a number of 'what if?' scenarios that predict different sets of inputs and possible outcomes. As such, scenario planning has been adopted to focus on the driving forces within the contextual environment and assess how organisations and institutional actors might shape or respond to ambiguity and uncertainty (Oliver 2008b, 2013, Kennedy *et al.* 2013). Building on this, Strategy as Practice (Whittington 2003, Jarzabkowski 2005, Chia and Mackay 2007, Regnér 2008, Golsorkhi *et al.* 2015) embraces learning and seeks to explain innovation and emergent practices, particularly within unpredictable environments. At its most emergent, Strategy as Practice stressing the active nature of strategizing and its direct relationship with implementation. It is more interested in what people do and the micro-activities and improvising that they undertake as they navigate complexity (Stacey 2007, Stacey and Mowles 2016). They suggest that this is a post-modern interpretation, which shifts the perspective from assuming a static, long term environment underpinned by strategic choice, to a more conceptualising dynamic process. Logically, dynamic relationships impact strategy and strategy making impacts on the organisation.

Looking across the ten schools of strategy making the approaches vary in a number of ways, earlier models were more rational, objective and prescriptive. The other schools are seen as being more descriptive and subjective and range from the highly deliberate through to the more emergent and iterative. With these variations in mind, it is important to identify how the strategy concept overall helps organisations. This is looked at in more depth in the following section.

3.4: The strategy concept

By accepting that cognitive bias and organisational culture will impact on strategy formation, Mintzberg *et al.*, (2003) proposed the 5Ps of strategy formation (as outlined in Figure 3-11 overleaf), to help differentiate some of the many different possibilities that could exist. They suggest that sometimes one must look at the actual emerging pattern of the enterprise's goals, policies and programs to see what its true strategy is, and whether it is a consciously proposed plan in advance or simply the result from a stream of decisions.

The Five P's (Plan, Ploy, Pattern, Position, and Perspective) help interpret the differences in strategy making and enable researchers to explore the relationships between leadership plans or intentions, with what an organisation actually did.

Within the 5P's, Strategy as Plan is labelled as the *Intended* strategy, whereas the Strategy as Pattern is identified as the *Realised* strategy. This starts to enable the distinction between those strategic intentions that are deliberately and prescriptively planned out and fully realised, i.e., *Deliberate* strategies, and those that are planned, but do not come to fruition, i.e. *Unrealised* strategies.

Strategy as a plan (Intended)	Strategic plan integrated and comprehensive. Designed in advance to ensure objectives achieved. Detailed, precise intentions common to all, with supporting contingency plans, to be realised exactly as intended with no interference from external forces (Mintzberg & Walters, 1985).
Strategy as a ploy	Manoeuvres intended to outwit opponents. Porter (1980) identifies general bargaining processes. Schelling (1980) discusses using market signals, competitive moves, and announcing ploys to outwit rivals in a competitive or bargaining situation.
Strategy as pattern (Realised)	Although unarticulated, consistency of behaviour over time can be a strategy. Therefore, patterns of behaviour can be labelled strategy. For instance, a company who always makes the most expensive products in its industry pursues a high-end strategy. Hofstede (1984) notes characteristic dimension of cultures (such as Uncertainty Avoidance) may lead some cultures to rely more heavily on consistency.
Strategy as position	Strategy relating to how an organisation locates particular products in particular markets. Porter (1996) states strategies can create unique and valuable positions, involving different sets of activities in different places.
Strategy as perspective	Perspectives describe an organisation's fundamental way of doing things. Drucker (1970) says this can be detected by looking inside at the organisation's mission and vision. Hart (1992) adds that the perspective reflects a symbolic approach to strategy.

Figure 3-11: Five Ps for Strategy (adapted from Mintzberg & Quinn, 1995; Mintzberg, et al, 2003)

It also starts to give a voice to the concept of the *Emergent* strategies, derived from reviewing, resolving and learning from issues that were not foreseen or intended at the original planning stage. This is where patterns develop in the absence of intentions, or despite them, and as discussed previously, is a more practical, adaptive or intuitive form of strategizing that is appropriate in a complex and unpredictable environment (Stacey 2007, Stacey and Mowles 2016).

This suggestion of different start and endpoints is useful as it facilitates comparison between intended strategy with realised strategy and the conditions that might exist in between. Mintzberg, et al, (2003) conceptualise these different aspects in the Strategy Concept model, as shown in Figure 3.12.

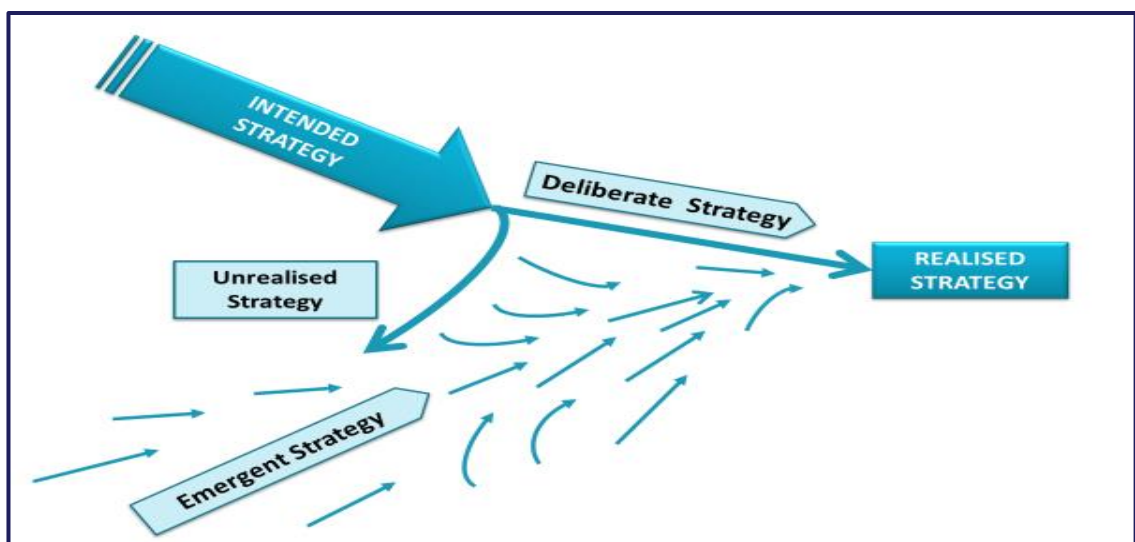


Figure 3-12: Strategy Concept: comprised of both Deliberate and Emergent Strategies (Mintzberg, Lampel, Quinn, & Ghoshal, 2003, p. 143)

The Strategy Concept is, therefore, comprised of both Deliberate and Emergent Strategies – and as such, can accommodate both the idea of objective rationally planned strategy with the entrepreneurial approach of emergent, opportunistic subjective decision making, or the

more adaptive strategy making required to navigate turbulence. Emergent strategies may develop under the auspices of a powerful vision, or come about when a highly planned strategy has to be changed by the operational requirements – in an unintended order (Lampel *et al.* 2013).

For Mintzberg & Waters (1985, p. 258) a fully realised strategy, i.e. a detailed prescriptive plan that is delivered in every detail without variation, is a “*tall order*”. Likewise, they believe that to be “*perfectly emergent*” there must be consistency of actions over time but no evidence of a supporting “*intention*” (p. 258), commenting that neither are likely to be found very often and both represent the extremes of a “*continuum*” along which real-world strategies may fall (p. 259). In practice, this seems to mean that often an umbrella strategy might provide a broad outline of actions that are required, whilst other details will emerge along the way.

This type of partially imposed strategy is more realistic as it accommodates the environmental influences whilst “*determining under what part of the umbrella the organisation can operate*” (p. 269) and it appears that most realised strategies lie somewhere in the middle, meaning that strategies are both formed, and formulated in a range of different ways. Mintzberg and Waters (1985) articulated these various kinds of strategy making approaches, as seen in the more detailed breakdown in Figure 3-13.

Strategies	Major Features
Planned strategy	Strategies originate in formal plans: Highly deliberate, precise intentions articulated by central leadership. Backed by formal controls to ensure exact implementation in controllable/predictable environment with distinctions between formulation and implementation, requiring commitment and procedures (plans, programmes and controls) elaborated down hierarchy.
Entrepreneurial strategy	Organisation under personal control of leader. Often located in protected niche environments. Strategies originate from central/leader vision. Often poorly elaborated as formulator also implementor, enabling reformulation and adaptable to new opportunities. Often deliberate but can emerge.
Ideological strategy	Strategies originate in shared beliefs / collective vision of membership: Often inspirational, controlled normatively via indoctrination, shared norms and/or socialization. Organisation proactively engaged in environment. Change agreed collectively and could be resisted. Strategy highly deliberate.
Umbrella strategies	Strategies originate in constraints: Leadership defines strategic targets/ boundaries or targets, so strategies partly deliberate. Leaders allow others flexibility to manoeuvre and form patterns within boundaries. Actors respond to forces / complex, unpredictable environments, making them partly emergent (patterns within them), therefore deliberately emergent.
Process strategy	Strategies originate in process: Leadership controls process of strategy making, including who and how it is made, but delegates content to others. Strategies partly deliberate (concerning process) and partly emergent (concerning content) - deliberately emergent.
Unconnected /Disconnected strategy	Strategies originate in enclaves: Units produce their own patterns without guidance / or in direct contradiction to any central/common intention. Can be collection of personal strategies. Strategies organisationally emergent. May be deliberate or emergent for individuals involved.
Consensus strategy	Strategies originate in consensus: Various members converge on patterns that become pervasive in absence of central/common intention through mutual adjustment. The strategies are generally emergent.
Imposed strategy	Strategies originate in environment: External environment dictates patterns in actions, either through direct imposition or implicitly pre-empting or bounding organisational choice. Strategies organisationally emergent, but maybe internalized by organisation and made deliberate

Figure 3-13: Types of Strategy (adapted from Mintzberg & Waters, 1985 p. 270)

3.5: Strategies, tactics or short-termism

As seen from the discussion above, traditional teaching around strategies starts with the principle of goals and the major long-term directions of an organisation. These can be Deliberate or Emergent but generally, exist in a continuum between these two extremes. There is also a dimension of innovation and adaption, or exploration and exploitation, required within a strategy to ensure that the organisation can keep up with or ahead of changes within an unpredictable environment. They were traditionally described as starting with the visionary leader or senior strategists within the organisation and being implemented through the various business units. Alternatives are offered whereby it is seen that strategy can be derived from the business units and individuals or devolved to departments and specialists or may be arrived at by some form of group consensus, depending upon the organisational culture. This is developed further through Strategy as Practice which focuses on the dynamic micro-activities of implementation within organisations rather than the long-term directions. But, if the strategy can be identified within the micro-activities, how do we differentiate between strategies and tactics? The existence of these as two separate domains can be traced back to at least the 5th Century BC when Sin-Tzu wrote:

“All men can see the tactics whereby I conquer, but what none can see is the strategy out of which victory is evolved” (2008, p. 18).

This is regarded to be the first treatise on strategy. Within the military setting the terms seem to demonstrate some clarity of purpose, however, in managerial literature it is far from clear. According to Mintzberg & Quinn, (1995), the primary difference lies in the scale of action and the perspective of the leaders. They note that what appears to be tactics to the Chief Executive may be a strategy to the Marketing Director, especially if it determines the ultimate success and viability of the organisation. They postulate that ‘tactics’ are generally the details for the short duration adaptive actions, interactions and realignments that are used to accomplish the goals, whereas strategy refers to *“the important things”* (p. 12). But there are many others that offer different interpretations. Chamberlain, (2010, p. 31) suggests that descriptions of how *“the entire organisation addresses its underlying purpose is strategy”* whereas everything else is either tactical or operational. He offers a few propositions on what constitutes a strategy as opposed to tactics, as does Grant (2018) who states that strategy is the overall plan for deploying resources to establish a favourable position, whereas a tactic is a scheme for a specific action, see Figure 3-14 below.

The strategy operates in a bounded domain
A strategy has a single coherent focus
A strategy consists of a basic direction and a broad path
A strategy can be deconstructed into elements
Strategies are important
Strategies involve a significant commitment of resources.
Strategies are not easily reversible

Figure 3-14: Characteristics of Strategic Decisions (adapted from Chamberlain, 2010; Grant, 2018)

The question of when is a strategy not a strategy was also raised by Porter (1996) who noted the rise of operational effectiveness (OE) as a source of competitive advantage but warned that this should not supplant strategy. Organisational effectiveness looks to optimise organisational behaviour, the people resource and the role of management. It is essentially about being efficient in doing the right things (Mullins 2016). Porter (1996) believed that focusing on OE compromised a company’s ability to invest in the business for the long term and warned against frequent shifts, or vacillating strategy, where operational effectiveness determined an organizations performance. But could this not just be an emergent strategy or adaptive incrementalism?

Guillen & García-Canal (2012) sought to identify what strategic advantage emerging-market multi-nationals had and why they were succeeding where developed world companies had failed. They found that many of the successful companies “set little store by strategy” (p. 102), and spent little time on planning long-range moves, forecasting or fashioning corporate strategies. They observed that successful strategists appeared to “grab opportunities” in real-time and had a higher appetite for risk and a higher tolerance for failure (p. 105). Guillen & Garcia-Canel call this the emerging companies’ mindset, proposing that coming from chaotic and unpredictable business environments in their own domestic markets, the emergent organisations were happy to focus on execution, and impatience to expand internationally and venture into the unknown.



Figure 3-15: Dominant themes in evolving strategic management (Grant, 2018. p. 14)

Is this a tactical orientation or an emergent strategy, as identified by a pattern of behaviour? It would seem to fit with the principles of strategy as practice and the need to be flexible and quick off the mark in turbulent and unpredictable environments where disruption created by new technologies and the accelerating rate of environmental change can be observed to have had an impact on competitive dynamics. As summarised in Figure 3-15,

Grant (2018, p. 14) concludes, this means that strategy has become less about plans and more about creating options for the future, fostering innovation and seeking uncontested market space as organisations adapt to the turbulence in the market environment.

This theme is echoed by Outram (2016) who states that companies are finding that their planning horizons are now being measured in months or quarters, rather than years, and that in the fast-moving digital world companies are no longer able to take the time to execute traditional strategy. He asserts that pure-play companies who started as digital businesses, very seldom write a strategic plan, and are more likely to have a vision and a planning horizon of three months to a year, proposing ‘stractics’ as a new term for this. The success factors for stractics differ slightly from those offered for a successful strategy, as shown in Figure 3-16. The proposed 90-day planning cycle is a long way from Porter’s view of a 10-year strategic planning time horizon. This contraction of time also resonates with the concept of recency bias, where ‘new’ is applauded for being just that.

Get a leader with vision
Outlaw the word ‘cannibalisation’: Just do it before someone else does
No dabbling: Do not undertake work in a risk-avoidance or half-hearted way
Align the organisation from top to bottom
Align online and offline KPIs
Do not put your head of IT in charge
Accept digital as an opportunity, not a threat
Reward experimentation and tolerate (some) failure
Adopt 90-day planning cycles and budgets to match
Obsess about the consumer

Figure 3-16: Ten Success Factors of Stractics (adapted from Outram, 2016)

In addition, there is a rising theme of experimentation and testing, which underpins an altogether more inductive, explorative and learning approach. Authors suggest that this inductive and adaptive strategy making style is more suitable to the complex, turbulent and unpredictable environment where the organisational micro-actions and learning are central to the review and iterative process. (Regnér 2003, Mowles *et al.* 2008, Regnér 2008, Grant and Jordan 2015, Reeves *et al.* 2015, Stacey and Mowles 2016).

The emergent trend also embraces the scientific approach of informed trial and error, failure analysis and fail fast process (Guillen and García-Canal 2012, Loscalzo 2014, Khanna *et al.* 2015, Outram 2016, Friend *et al.* 2019).

As powerful and successful pure-play digital organisations, Google and Facebook use the term ‘Fail Fast’ when describing their approach to innovation. Facebook’s mantra for developers was ‘Move Fast and Break Things’, meaning that new tools and features on the platform might not be perfect, but creation speed was key, even if there were some errors along the way (Murphy 2014). McGrath (2011, pp. 79–81) conceptualised Fail Fast around a number of key principles to help ensure that organisations “*plan for, manage and learn from*” failures. These include the importance of creating the right culture, being clear what success

would look like, planning small incremental steps to learn one thing at a time and ensuring all assumptions are captured explicitly, so that you can clearly identify and learn what worked and what did not (*ibid*).

Fail Fast is an agile approach to strategy, generally explored within the organizational learning literature. It is grounded in exploratory learning and learning from small failures in experimentation, rather than catastrophic errors (Khanna *et al.* 2015, Friend *et al.* 2019, Sanjai Kumar Shukla 2020). The Fail Fast phenomenon emphasises the scientific method of trial and experimentation, where experiments are framed in terms of the null hypothesis. Every failed experiment changes the researcher's perspective and leads to refining and narrowing of the problem iteratively over time (Loscalzo 2014). In relation to social sciences and the issues of strategic management being investigated here, it reflects the Learning School and that more iterative and inductive, practice-based approach. As stated by McGrath (2011, p. 83)

“In an uncertain and volatile world, avoiding failure is not an option. If you accept this premise, the choice before you is simple: Continue to use practices that limit what you can gain from failures—or embrace the concept of intelligent failure, in which learning can create substantial value”

There is, therefore, a conceptual blurring of the edges between strategy and tactics in the current literature, and deliberate inclusion of operational aspects that support day to day micro-decisions and managerial actions.

This has been termed agile strategy (Friend *et al.* 2019). In addition, there is a greater focus on describing outcomes and what success looks like, with the language of key performance indicators (KPIs) and return on investment (ROI), rather than prescribing what the plan should look like.

3.6: Choosing a strategic style

Regnér (2003, p. 77) identified that these variations in approach can lead to “*a strategy making dichotomy*”, where two completely different types of strategy activity are being undertaken within an organisation. His research contrasts central senior managerial teams and the more ‘peripheral’ operational teams, noting that sensemaking in the periphery was gained through inductive and exploration strategy activities “*derived from new observations and experiences*”, whereas those at the centre relied on deductive and exploitation-oriented activities related to well defined and shared knowledge structures “*including values and beliefs tied to historic strategy*”. He concluded that whilst deductive, exploitation focused practices are important for refining the existing strategy, the more explorative and inductive approach is “*crucial for strategy creation and development*” (Regnér 2003, pp. 77–78).

In a similar vein, Reeves *et al.* (2012) identified that all of these styles of strategy making can be observed when reviewing a broad range of organisations, and offer guidance on which might be the most appropriate. Their matrix draws on a longitudinal evaluation of ‘salient strategy making frameworks’, summarising the changes in approach seen through the literature over time. They highlight five broad strategic approaches, Classical, Adaptive, Renewal, Visionary and Shaping, with the classical approach dominating business activity. Building on this, they recommend that companies need to consider the type of market they

are in and pay attention to the speed of change within it before deciding upon their strategic approach.

To visualise this they offer a matrix, drawn along axes of predictability and malleability, to propose four industry environments that should drive different approaches to strategy making, as seen in Figure 3-17. Predictability offers the same types of dimensions as the complexity and turbulence observed by Stacey and Mowles (2015). Malleability, on the other hand, is defined as being the extent to which a company, or its competitors, can influence market factors. They note that these two factors are often ‘conflated’, which can limit strategists to thinking that there are only two choices.

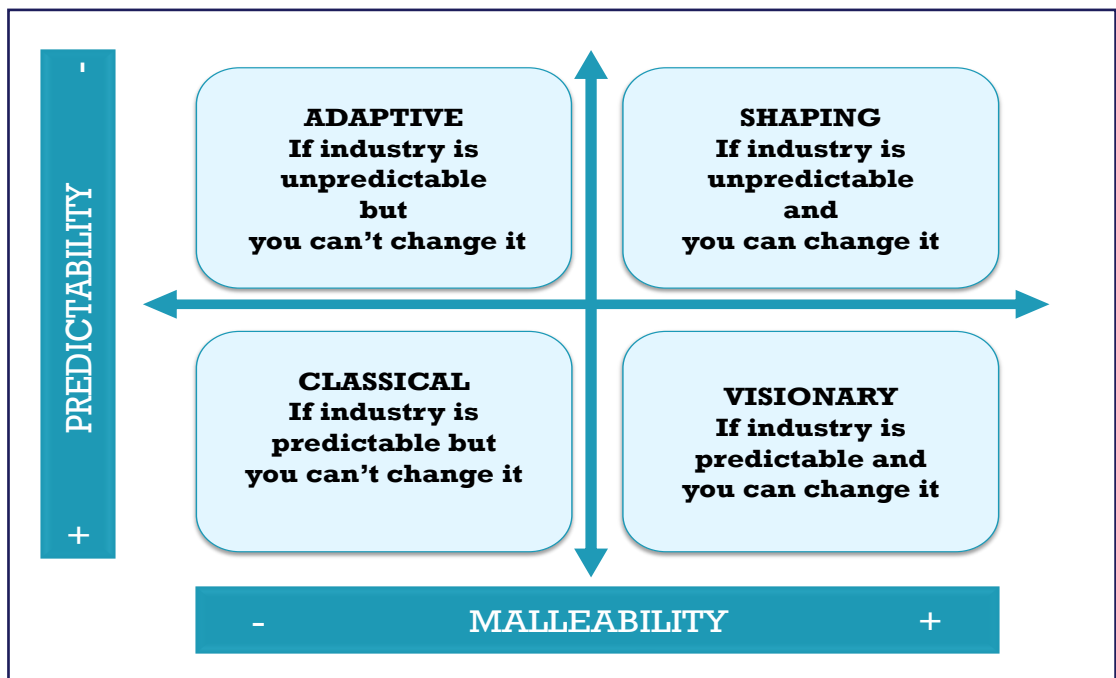


Figure 3-17: Right strategic style for the environment (Reeves et al. 2012, p. 80)

They posit that the classical approach, which takes a deductive and rational approach to planning the long term future, is suitable for industries whose environment is predictable and hard to change, because the “most attractive positions” and “most rewarded capabilities today will, in all likelihood, remain the same tomorrow” (Reeves et al. 2012, p. 79). Where industries are more malleable but still predictable, the Visionary approach can be established with clear goals and deliberate steps that need to be implemented correctly to ensure the vision is well executed. They note however that in unpredictable, technologically innovative and economically uncertain global environments such long term plans will rapidly become obsolete, a point echoed by Outram (2016). In this situation, they suggest two alternatives based on whether it is possible to change the industry or not.

For those that are able to innovate, the principles of exploitation and fail fast are captured within the ‘Shaping’ approach. Facebook is offered as a prime example, where the goal is to shape the unpredictable environment to their own advantage before someone else does. But not everyone can be the innovator, and many companies have to operate alongside innovative markets but are not in a position to overtly shape them. They sit in the

unpredictable and unmalleable quadrant, and need a more adaptive approach, where planning cycles become continual as they constantly refine their goals and tactics with the aim of engineering flexibility rather than optimising efficiency.

Reflecting on this, Reeves *et al* (2012) note that a large percentage of organisations are “clinging to the wrong strategy style”, because they do not feel sufficiently confident to apply an adaptive style, preferring to stay with the classical and visionary styles they learned at business school (*ibid* 2012, p. 82).

Echoing Regnér (2003), they note that problems can be exacerbated further when the organizational culture dictates that everyone within the company adopts the same approach, rather than adapting the approach by division. As a relevant example, they highlight that within the auto industry a classical style would work well for optimising production, but would be inappropriate in the marketing and advertising department who should be aiming to shape its environment (Regnér 2003, Reeves *et al.* 2012).

3.7: Discussion and conclusions

The purpose of this chapter is to review the theories and principles of strategy making so as to better understand the strategy making implications within media planning. It indicates that there is no simple definition of what strategy is, however, the trajectory over the last fifty years and the shift in organisational focus is helpful in interpreting what it may be, and how it applies in the context of media strategy and planning.

Approach to strategy making

Strategy is classically concerned with establishing the “*pattern or plan that integrates an organisation's major goals, policies and programs into a cohesive whole* (Lampel *et al.* 2013, p. 10). This has historically had a long-term perspective focused on the implementation, marshalling, positioning, or even stretching, of resources to support the corporate direction to build distinctive competence and competitive advantage following extensive assessment and evaluation of the environment. Andrews (1980) added that the strategy should also outline what the organisation thinks is ethical, legal, and moral.

This type of strategy making is said to be deductive in nature and based upon an objective or positivist interpretation of the known reality. As such, it is underpinned by the theory of strategic choice and acknowledged as the classical and dominant approach used by practitioners. However, in the more recent debate, authors point to greater variations, with more intuitive and inductive approaches (Regnér 2003, Reeves *et al.* 2012). Mintzberg *et al.* (2003, p.12) summarise this thinking with the model of the Strategy Concept, articulating the continuum that can be found between Deliberate and Emergent strategy (see Figure 3-12, p. 61) whilst noting the theoretical extremes of both fully emergent or fully deliberate strategies are unlikely.

In relation to media planning, the deductive, planned and prescriptive approach to strategy making outlined in the Planning & Design Schools (Lampel *et al.* 2013) resonates with the media planning frameworks discussed in Section 2.5: (see p. 36). These also assume that extensive analysis will allow the rational actors to design the optimal solution. The models

refer to developing alternative schedule options and identifying the optimal delivery which can then be agreed and handed on to the media buyer for implementation as intended (Sissors and Petray 1976, Barban *et al.* 1988, 1993, Donnelly 1996, Cannon 2001). This type of scenario planning assumes that the options can be reviewed objectively in the confidence of a relatively known and stable environment and that the realised strategy can be implemented reliably as prescribed. The realised strategy is therefore very deliberately seen through, and because it relies on current knowledge structures, it is more exploitative than exploratory in nature.

The more recent media planning process models highlight an increasing need for testing, optimisation and iteration at the implementation stage, but still suggest a relatively linear progression from briefing through to execution. The literature, therefore, provides evidence that the existing media planning frameworks are underpinned by a classical deductive and objective approach to strategy making.

Influence of cognitive bias and culture

Looking at the role that heuristics and cognitive bias play in strategy making, it is clear from Simon's work (1964, 1989) that individuals and organisations can achieve only bounded rationality. This implies that strategy is made and influenced by human beings and therefore is not just the product of the analysis and evaluation of data, but also of the motivations and cognitive processes, or cognitive bias, of those making the decisions and the way those biases may influence the interpretation of the data. Culture is shown to be responsible for some of the cognitive variations, with levels of risk aversion and control being two clear points that influence and differentiate an organisation overall management style and impact how adaptive or innovative they may be in their strategy making decisions (Kirton 1976, Trompenaars 1996, Handy 1999, Rettie 2003, Del Prá Netto Machado and Carvaiho 2008, Hofstede *et al.* 2010).

In relation to media strategy making, this demonstrates how media agencies may differ in the solutions they propose but also highlights the potential for conflict. The media models stress that the proposed media strategy should not be developed in isolation but as an integral part of the client's marketing strategy. It should be informed by the client's marketing plan and therefore media strategists need to be comprehensively briefed and included within the strategic planning team from the very start of any planning cycle. The final recommendations need to be compatible with the client's communication objectives to deliver the client's business goals. However, those decisions will inevitably be shaped by the strategist's own interpretation of the client's data, the competitive marketplace and by their interactions with media owners. In addition, they will be influenced by their own employer's business goals (Farmer 2015) which means that media strategists are subject to the influence of both the client's imperatives and their own agency priorities. This could be a source of conflict as they are answerable to both their client and their employer for the decisions that they make regarding the media they select. This implies that the media strategies proffered will be shaped by the cognitive bias of the media strategist and by the organisational culture within

which they sit, both of which could be a source of competitive advantage or disadvantage for the media agency.

Choosing a strategic style

The schools of strategy (see section 3.6) sum up some of the alternative approaches to strategy making and provide a useful classification of the various approaches discussed in this chapter. They range from fully articulated, intentional strategies through to fully emergent, but also capturing the importance of cognitive bias within the entrepreneurial and cognitive schools, and the more inductive, adaptive and emergent approaches of the learning school (Lampel *et al.* 2013, Mumford 2015). In terms of changing trends, the emerging company mind-set is shown as being more short term in nature and more focused on execution, which could be considered tactical rather than strategic planning (Mintzberg, Ahlstrand and Lampel, 1998; Guillen and García-Canal, 2012; Grant & Jorden, 2015, Outram, 2016). However, building on Kirton's classification, authors such as Regnér (2003, 2008) and Reeves *et al.* (2012) offer that this represents a more inductive and adaptive strategy making approach, which is very appropriate to the complex and unpredictable environment. By looking at the act of strategising, rather than strategy making, it shows that this short term, iterative approach can be seen as strategy as practice (Whittington 2003, Jarzabkowski 2005, Golsorkhi *et al.* 2010), where there is a greater focus on individual and organisational micro-actions and learning, elements that might have been implicit within the foundational concepts of strategic planning, but are now clearly explicit and central to the review and iteration process, echoing the more scientific approach of learning by trial and error (Grant and Jordan 2015, Khanna *et al.* 2015, Outram 2016, Friend *et al.* 2019).

The frameworks offered to support the media planning process outline an objective and deliberate view of media strategy formation with a highly deductive approach where goals are defined through the client objectives. The recommended media plans are derived by evaluating a wide range of marketing, communication and media factors to identify the optimal mix of media channels and vehicles to deliver these objectives. Therefore, the media plan would detail the why, what, when, where and how of the various elements of media space and time needed to deliver the communication messages to the relevant target audiences. This echoes both the Design School, with its vision of what should be done and also the Planning School, with the detailed articulation scheduling (Lampel *et al.* 2013). Because client approval would be required prior to implementing the recommendations, the intended programmes would be very deliberately seen through.

However, as seen in the strategic management literature, this deliberate approach to strategy making is not necessarily the most appropriate. Media strategists operate within the marketing and advertising environment, which, according to Reeves, *et al.* (2015) is an unpredictable environment, where organisations should be looking to take an adaptive or shaping approach to their strategies, rather than the classical deductive and prescriptive approach. As a result, it can be hypothesised that the drive for accountability, in combination with the need for flexibility and real-time iteration, is leading media strategy making toward the Learning School and a more emergent approach. By combining the discussions of Mowles,

Stacey, & Griffin (2008), Reeves *et al.* (2015) and Regnér (2003, 2008) with the underlying Strategy Concept model (Mintzberg, *et al.*, 2003) it is possible to conceive that approaches to media strategy and planning should have changed to accommodate the complexity and unpredictability of the environment.

As conceptualised in Figure 3-18, it is concluded therefore that this new operating environment may lead to alternative media strategy-making processes, and the consideration that media strategy has changed from the processes outlined within the existing literature, driven by the conditions of complexity and turbulence and the need to respond and iterate in the fast and rapidly changing environment.

This conclusion needs to be confirmed by further research.

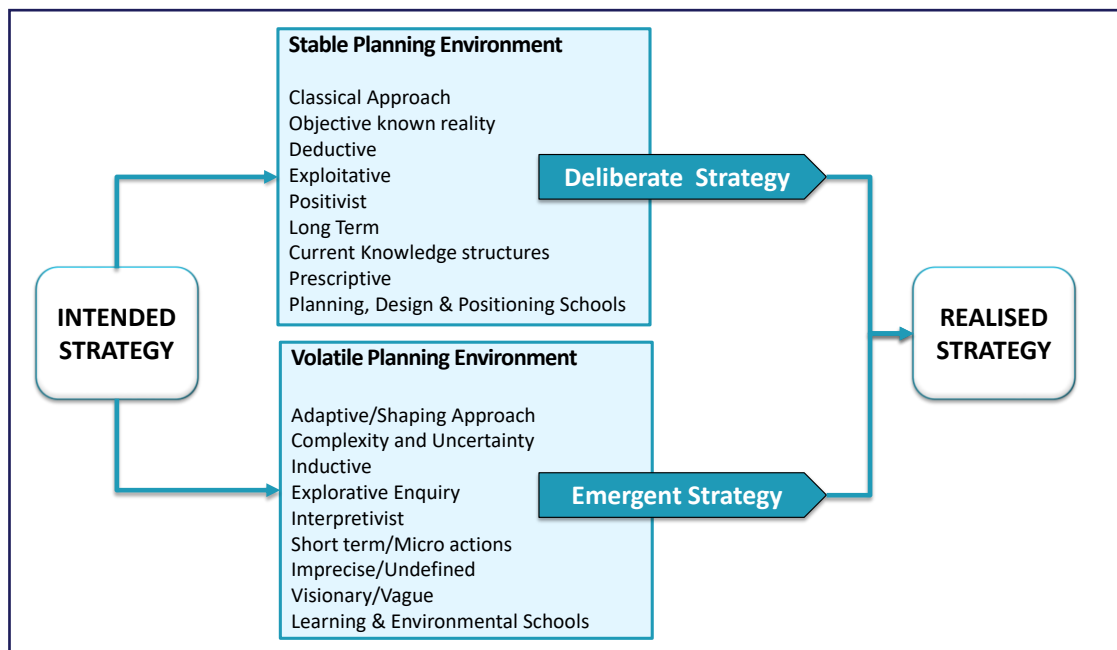


Figure 3-18: Proposed change in media strategy making in complexity and turbulent environment

Concepts and issues influencing strategy making

Whilst this exploration of strategic management literature offers some insight into the possible ontological changes taking place across the media strategy and planning process, it does not shed light on all of the concepts and issues that need to be considered. To help answer the research questions more fully, it is necessary to explore further the research and developments across the fields that impact on the nature of the decisions made. This includes marketing, advertising and communications theory, together with the extensive body of research that has been generated around mathematical modelling to support the macro selection and micro scheduling decision-making needed to deliver the efficiencies and effectiveness that sit at the heart of the craft and professionalism of media planner.

The first of these, marketing, is explored next, in Chapter 4.

Chapter 4: Marketing Theory Underpinning Media Planning

4.1: Introduction

As seen in Chapter 2, media planning does not operate in a vacuum and is no longer considered to be just about implementing efficient media buying. It has been positioned as an extension of marketing, where the media planner must understand the marketing strategy and consider all of the marketing information available on the product to determine how best to reach the audience with the brand message and produce an effective and creative media plan (Barban *et al.* 1993, Donnelly 1996, Cannon 2001, Katz 2016, 2019). In effect, as identified by Katz (2019) the final media plan sits at the centre of the marketing plan rather than at the culmination of it, and is driven by a hierarchy of objectives (see Figure 2-17, p43).

To continue the exploration therefore, this chapter examines the literature focused on the objectives of marketing and some of the key research and theories that support them. This is contextualised with further research relating to how these objectives, and the way they are conceptualised can impact on the media strategy.

The chapter also explores the client/agency briefing which is recognised as the point at which the marketing objectives are confirmed, and additional supporting marketing information is made available. As such it marks the start of the media planning process, providing the initial details that need to be considered when developing the media strategy. Further factors include advertising and communication theories, together with a vast wealth of theory relating to media selection and optimisation, which will be explored and discussed in chapter 5.

4.2: The goals of marketing

Baker and Hart (2016) summarised sixteen commonly cited definitions of marketing which they classified into two distinct groups. Firstly, marketing as a process, enacted via marketing channels connecting companies to their customers; and secondly, as a concept that sees marketing as a social exchange between willing producers and consumers. Marketing is therefore, both a philosophical concept and a management tool. As a management tool, Katz (2019) suggests that the primary goal of marketing is to increase the sales and profits of the organisation, which is reflected by the UK Chartered Institute of Marketing (CIM) who offer a definition that encompasses both process and the philosophical aspect:

“The management process responsible for identifying, anticipating and satisfying customer requirements profitably” (CIM 2015, p. 3)

The marketing plan, therefore, is the functional process through which the marketing team articulate their plans for the products or brands that they are responsible for (Kotler and Armstrong 2013). Supporting this are a host of marketing models and management tools, which have been developed in response to the changing marketing environment.

To enable marketing to be applied to a wider range of organisations, various terms and definitions have been used to supplement customers, sales and profits for, say, donors,

donations and surplus in the context of non-for-profit marketing (Sargeant and Jay 2003, Bruce 2011) or voters and votes for political marketing (Lees-Marshment 2015, Stan and Epuran 2019). Reflecting this, researchers and marketers have proposed both general and specific aspects of the marketing mix to help increase its relevance to different categories and sectors, as well as exploring niche areas or disciplines, such as targeting, ethics, sponsorship, relationship marketing, direct marketing, social-media marketing, ROI marketing, etc., as summarised in Figure 4-1.

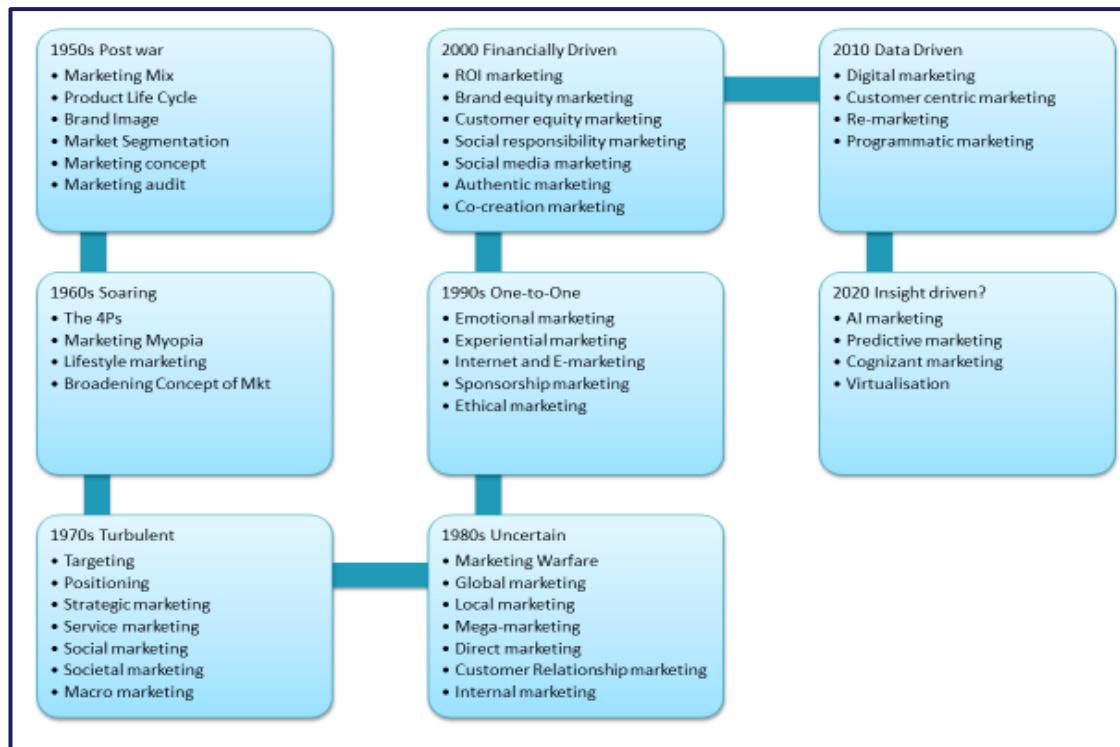


Figure 4-1: Changes in marketing models 1950-2000 (adapted from Kotler 2009, p. 4)

Katz (2019) highlights that to do their job the media planner must understand marketing systems, follow the logic of the marketing plan and know what is expected as an outcome. They need to understand markets, market segmentation, market competition, and how the marketing mix changes over the lifetime of a product, service or brand. They need to know if they are trying to make consumers aware of new products or remind a consumer that it is time to buy again. When working with charities or government agencies, strategists need to understand social marketing and behaviour change. Finally, they need to be able to estimate what the likely level of competing noise might be and how their plan can break through the clutter to deliver the required outcomes. Overall, Katz concludes that:

“... they need to understand as much about how consumers view and use the product or brand as they do about how consumers use different media channels” (Katz 2019, p. 11).

All of these aspects should be articulated within the definition of the marketing objectives which will help to isolate what the core issues are and highlight the focus for future activity.

4.3: The importance of objectives

The objective setting is therefore vital to the media plan and should be derived from the client’s organisational and marketing goals, not just the marketing communication goals. Katz

(2019, p. 37) goes on to note that to develop the media strategy the planner should be “cognisant of the way in which the organisation has determined to achieve the organisational objectives”. She gives the example that objectives to increase penetration and bring in new users will require a different targeting strategy to an objective to increase user frequency. Therefore, the overarching marketing objectives shape the advertising goals and media objectives. These in turn structure the media strategy and the development of the final media plan, encompassing the selection of the target audience, communication channels and techniques to be used. Media strategists are the campaign architects, building a picture that will “meet individual objectives and to add up to impact that is greater than some of the parts” (White *et al.* 2004, p. 9, Young 2014).

Looking at individual objectives, it is seen that there has been an increase in behavioural objectives driven by digital interaction. Therefore, the goals might be to maximise direct sales but could equally be linked to broadening customer relationships and building consumer interactions (Barker 2007a, Danaher *et al.* 2010).

Binet & Field (2008d, 2008c, 2017) have researched the impact of objectives on outcomes for many years. They distinguish two particular categories, firstly hard versus intermediate objectives, and secondly long-term brand building versus shorter term activation objectives. They clarify that hard objectives and related metrics measure factors that directly shape the business performance, [such as market share or pricing], or consumer behaviour, [such as penetration and repeat purchase]. Therefore, hard objectives can be further divided into two types: those that “reflect behavioural changes by consumers” and those that “reflect the net business effects of those changes” (*ibid* 2008d, p. 2). Building on this they suggest that campaign response targets, such as awareness, should only be used as intermediary indicators, but are too often identified as the final KPI.

Binet & Field support this with evidence from their research of the IPA DataBank that shows campaigns using multiple, clear, hard objectives, whether business oriented or behavioural, are generally more successful than those working only to intermediate consumer response targets, such as attitudes or awareness, as shown in Figure 4-2.

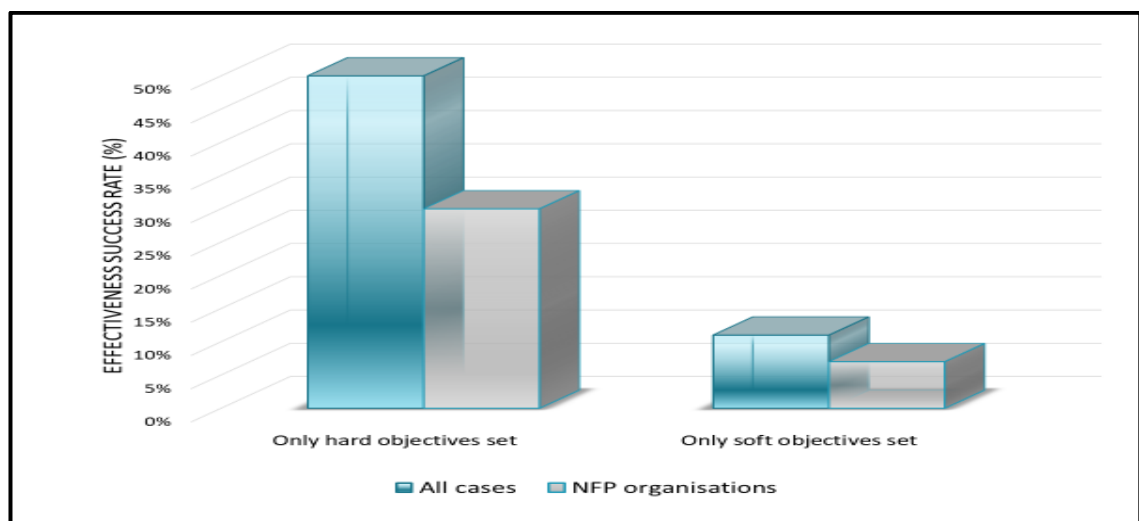


Figure 4-2: The importance of setting hard objectives (Binet and Field 2008c)

They contend that good objectives should be financially oriented, with a focus on profitability or an increase in brand value or market penetration. They conclude that marketing metrics should aim to measure changes in the real commercial world of the brand, not just in the mindsets of the target audience and suggest that all briefs to communications agencies should include hard objectives against which they can be evaluated. They also believe that hard business objectives should take primacy over hard behavioural objectives since the latter are more concerned with the 'how' than the 'what' (*ibid*, p. 4).

As a result, they propose their own hierarchy of objectives, which are reminiscent of the hierarchically linked objectives seen earlier: 1. Business objectives. 2. Behavioural objectives. 3. Intermediate objectives. They observe that a 'hierarchy of linked objectives' is the most successful guide for a campaign, such as "to increase profit by increasing market share by increasing penetration" (Binet and Field 2008d) and prove from their evaluation of the IPA DataBank that campaigns that aim to increase profitability outperform all others, both in terms of effectiveness and accountability. When the performance of profit-focused campaigns was compared with all the other campaigns in the evaluation, the profit-focused campaigns outperform all others (*ibid*) as shown in Figure 4-3.

% reporting very large effects on:	Average of all campaigns disclosing hard objectives	Campaigns aiming to increase profit
Sales	45%	64% (+++)
Market share	25%	33% (+)
Profit	23%	54% (+++)
Penetration	23%	28%
Loyalty	7%	11% (+)
Price sensitivity	4%	13% (+++)
Any measure	55%	84% (+++)

Figure 4-3: The greater effectiveness of profit-targeted campaigns (Binet and Field 2008d)

In terms of behavioural objectives, such as penetration and loyalty, their findings show that campaigns that strive for increased penetration are more successful in shifting overall market share than those that seek to increase loyalty. This echoes the work of Ehrenberg (2000), who proposed the Dirichlet models to explain consumer adoption and usage patterns of brands, and the Double Jeopardy model to demonstrate that brands with greater penetration also enjoyed greater loyalty (Ehrenberg *et al.* 1990).

This all reflects the move from measuring campaign outputs, to tracking business outcomes, reinforces the need to identify the right objectives and KPIs. As a generalisation, multiple authors note that marketing objectives need to be specific, quantified and have intended timescales attached, a recipe that has become known as SMART (Barker 2007b, MacLeod 2012, Fill 2013, Egan 2014, Chaffey and Ellis-Chadwick 2016). Concluding, Binet & Field (2008d, p. 2) note that marketing is unlikely to be effective, and certainly, success will be difficult to measure if objectives are not clearly spelt out.

The discussion has noted several times that return on investment (ROI) has become a popular KPI in media planning, however, many authors suggest this is controversial. Ambler (2004) points out that ROI objectives can lead to short-termism, as ROI can be reduced by simply cutting budgets and focusing on tactical short term conversion. Similarly, Graham, *et*

al (2018) highlight the potential danger of turning a metric into a target without adequate consideration, and advocates avoiding the use of ROI to evaluate marketing campaigns as it encourages narrow campaigns that skew towards heavier/more regular buyers. These routes neglect the longer-term brand building and therefore risks harming future sales, reducing the value of the brand over time, and in turn, harm long term profitability (Ambler *et al.* 2002, Ambler 2004, Dens and de Pelsmacker 2010, Wilson 2011, Kennedy and McColl 2012, Sharp *et al.* 2012, Binet and Field 2017, Graham *et al.* 2018).

As shown, objectives should be clearly stated and hierarchy linked, with 'hard' measurable goals allowing for both formative and summative evaluation, and establishing waypoints that can be used to measure progress (Kitchen *et al.* 2004, Watson and Noble 2014, Chaffey and Smith 2017). This leads into considering how this information is transferred and the importance of the client/agency briefing procedures, which is considered within the next section.

4.4: The importance of the media briefing

The formative briefing has been identified by many authors as the start point for any media plan. Barban, *et al* (1993) explicitly included an array of background inputs including internal data and details from the marketing plan and external research into consumers and other 'uncontrollable' influences such as the competition and economic conditions (*ibid*, p. 5). These are shown to feed into a multiplicity of hierarchically linked objectives, as outlined in Figure 4-4 below.

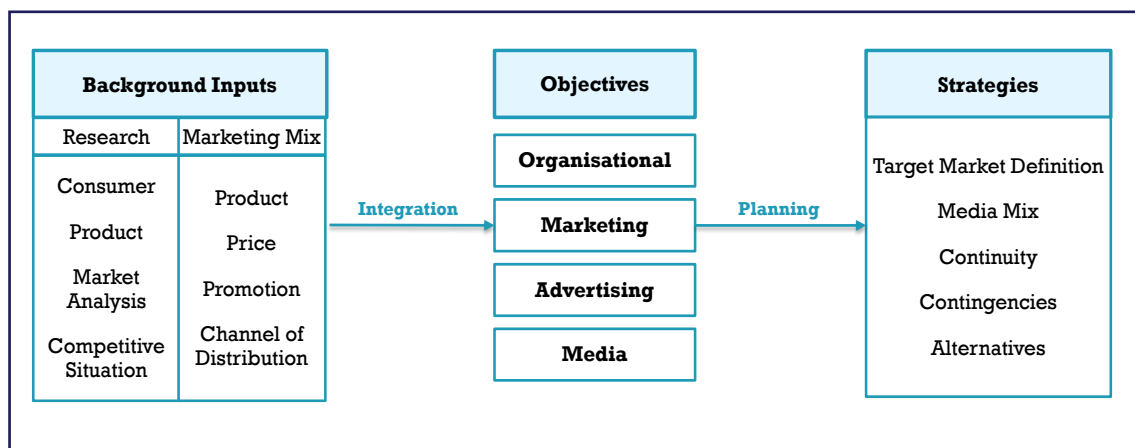


Figure 4-4: Summary of Background inputs for effective media planning (Barban *et al.* 1993, p. 5)

As noted by Katz (2019) the media planner must be as conversant with the aims and motivations of the consumer as they are with the goals of the product to be able to do their job and add their own insights. The briefing, therefore, is a vital starting point as it will scope the dimensions of where the media planners' activities should lie and clarify their responsibilities and accountabilities.

Looking at the wider discourse around briefing, industry support for good briefing was articulated through 'The Client Brief best practice guide' jointly produced by the four main UK agency and client trade bodies, namely the IPA, ISBA, MCCA and PRCA (IPA 2003). The industry group undertook research in March 2003 to identify some principles behind a good

brief and what a good brief should contain. It showed that the current briefing process was far from satisfactory, with clients sometimes using the creative process to clarify their strategy or relying on their agency to write it. Their model advocated providing written client briefs, which should contain extensive details of the current internal and external situation (Where are we now?), together with the overall marketing objectives (Where do we want to be?), what the marketing team are planning to do (What are we doing to get there?) and “clear indications of what will success look like and how will it be measured” (*ibid*, p. 7).

Combining these sources could provide a checklist of the information needed to make a sound media decision. However, outside of subject textbooks, there are relatively few studies that deal specifically with the area of briefing or how this area may have changed in the light of the trading and technology-led disruption discussed previously.

Cowan & Abratt (1999) undertook research specifically into the subject of media planning briefings. They interviewed both marketing managers and media planners to shed light on the process and surveyed 100 South African companies and advertising agencies to test theories around the briefing and media selection process to identify whether marketers and media planners prioritised decision-making factors differently (see Figure 4-5).

1	Do marketers and media planners prioritize different factors when considering media selection?
2	Do marketers and media planners differ in the importance attached to factors that should be considered in media selection?
3	Are media planning functions inclined to focus on marketing communication objectives in isolation and not in the context of the overall marketing objectives?
4	Do media planners base their media selection decisions on inadequate information and limited knowledge of current market conditions?
5	Do media planners focus only on traditional quantitative data and thus neglect non-quantitative data in the media selection process?
6	Are media planners neglecting strategic competitor analysis?

Figure 4-5: Research Questions explored by Cowan & Abratt, 1999

They based their initial concepts on the media planning process identified by Sissors & Petray (1976) [see Ch 2, Figure 2-9, p. 36], although acknowledging that the model is “limited in its capacity to highlight the complexity of the media planners’ decision process” (*ibid*, p. 38). Their questionnaire included 14 core information areas, as outlined in Figure 4-6, with a total of 68 discrete sub-items drawn from the literature (see Appendix 12-4, p 228). Respondents were asked to rank the information items using a 10-point numeric scale.

Budget information	Communication planning & strategy information
Competitive information	Consumer behaviour information
Creative information	Historic information
Media information	Information concerning objectives
Product /brand information	Reach/frequency information
Sales information	Segmentation and target market information
Timing information	Market size information

Figure 4-6: Categories of Data Information (Cowan & Abratt 1999, p.44-47)

Their findings showed that respondents agreed on the four most important sub-factors:

- brand/ product marketing communication and media objectives,
- current budget constraints on the advertising/communications campaign,
- target-market demographics such as age, education, and income, and,
- media vehicle's audience demographics (*ibid.* p. 44).

The authors identified that these specific aspects were key to delivering an effective media campaign, with communications objectives and budget constraints being “*primary consideration*” when trying to select media to communicate an advertising message to as many of the target market as possible (*ibid.* p. 47). There were however clear variations across the rest of the survey and the authors concluded that marketers' and media planners' priorities differed on some important issues.

The general finding was that media planners did not consider some factors sufficiently, including the overall marketing objectives, product consumption patterns or competitor information, all of which is deemed critical by marketing managers. For example, ‘Brand/product marketing objectives’, was ranked fifth by marketers but 30th by media planning personnel. They also noted that planners placed less importance on product consumption patterns, customer sales analysis, sales and distribution strategies, buyer behaviour patterns, and purchase decision times when approaching their media selection decisions, which, they suggested, limited the ability of media selection to be seen as a strategic marketing tool. They suggested that media planners were also failing to evaluate many different types of competitor information that might allow them to develop pro-active and responsive counter strategies. Ultimately, they inferred that media planners were not able to plan strategically, noting that marketing communication objectives are only part of the overall marketing objectives and that clients need planners to be able to link their decisions to the “*overall picture*” and make “*more rational decisions*” by “*align[ing] their decisions with the priorities established by their clients*” (*ibid* 1999, p. 48)

Similar to the findings of the Client Brief Research (IPA and CAF 2004) seen earlier, Cowan & Abratt concluded that media planners were inclined to focus on marketing communication objectives and traditional quantitative data in isolation and not in the context of the overall marketing objectives, therefore marketing managers needed to brief advertising agencies in a more comprehensive way for media planners to do a good job.

This research was undertaken at a time when frameworks such as integrated marketing communications (IMC) and media neutral planning (MNP) were being proposed as ways to deliver a more cohesive message in the face of the rapid fragmentation of both media vehicles and audiences (Jenkinson and Branko 2004, White *et al.* 2004, Kitchen 2005, Laurie and Mortimer 2011, Kliatchko and Schultz 2014, Moriarty *et al.* 2015). Consequently Cowen & Abratt recommended that agencies should include their media planners in the strategic planning team if they wanted to become more IMC oriented but noted that the marketers would need to drive this process through their “*expectations, evaluations and subsequent compensation of advertising agencies*” (*ibid*, p. 50)

This research was followed up by Arul (2012, 2013) who replicated the study across a number of regions of India using a slightly modified Media Planning process derived from more recent literature, (see Ch2 Figure 2-14, p. 41). This clearly details that the initial plan/briefing meeting should act as a 'checklist' for the media planner, suggesting that after gathering all the information related to the market, media and audience, *"the planner and client should sit together to share their views"* (ibid, pp 46). Arul states that the key to success in the briefing/initial planning stage is that it should comprise the marketing and research executives, together with the senior agency staff, creative and media people working on the account, to enable everyone to discuss the media related matters with the client and reach agreement. The survey respondents included 25 ad-agencies and 75 clients and used 13 of the information categories proposed by Cowan & Abratt (see Figure 4-6), omitting Historic Information. In addition, the list of sub-items did not appear to be used. According to Arul (2012, 2013), statistical analysis continued to show a wide difference in the perceived importance of the information categories. Arul recommended that the main purpose of a briefing meeting should be to formally evaluate the current state/progress and growth of the brand and its market in the light of the client's goals and noted that any differences in perceptions of information shared at this stage can dilute the ultimate delivery of the client's objectives. Evaluation of the data showed less variation in perceptions of importance between clients and agencies in this more recent study than with the previous study but continues to highlight the need for agencies and clients to consider each other as business partners, sharing all the information that is necessary. However, it is logical in many ways for the ranking to vary between client and agency as they should naturally approach the situation from slightly different points of view, otherwise their input would be exactly the same, rather than complementary, as would be expected in a client/agency situation.

More recently Heo and Sutherland (2015) surveyed the views of media planners in the US to assess how briefing and information flow impacted on their client-agency relationships. Overall, their respondents suggested that marketers needed to *"do a better job communicating with the agencies they hire"* with specific concerns around clients not sharing company information, market analysis or their marketplace challenges, which they felt would enable them to engage *"with marketers' businesses and brands and give the agencies the tools they need to produce appropriate outcomes"* (p. 380). This demonstrates that transparency and sharing is still not optimal. In fact, Mortimer and Laurie (2019, p. 28) suggest that the *"relationship between advertising agencies and clients is being tested to its limits"* with discontent on both sides. They observe four areas that are driving this. Firstly, a shift in power, where clients now have more control over planning the interactions and touchpoints throughout the consumers pathway to purchase, together with the data and insights produced, making agencies *"less central to the decision-making process"*. This is evidenced by the increase in clients taking work in-house and *"not only making creative decisions but also media buying decisions without them"* (p. 34). Their research highlights issues in both trust and collaboration, with agencies feeling that they are not able to contribute at a strategic level and clients feeling frustrated that despite claims of media neutrality, agency propositions are still biased by financial self-interest.

In this context, it is clear that the client-agency briefing is vitally important for building a good partnership that is based on trust and collaboration. In relation to media planning, it is evident that there are many new information gaps appearing as a result of the rapidly changing dynamics created in the new digital environment.

4.5: Discussion and conclusions

This chapter has explored relevant aspects of marketing to identify how they impact upon the media strategy making process.

The literature shows that the media plan should be informed by the marketing plan, and therefore a thorough briefing needs to take place between the marketing client and the media planning team. This should include the exchange of all marketing related background, issues and goals, together with any relevant media data and insights to ensure that everyone can articulate and envision what success should look like.

To ensure this meeting of minds, it is important that media planners understand the essential goals of marketing and business strategies, and the interplay between these and marketing communication. A full briefing on the business objectives and marketing goals has been shown to be vital to this, however research amongst practitioners indicated that this is not always undertaken as effectively as it could be (Cowan and Abratt 1999, Mortimer and Laurie 2019). In addition, hard objectives have been proven to improve effectiveness (Binet and Field 2008d). The short-termism noted in Chapter 3 (see Section 3.5, p. 62) has become evident, driven in part by the move towards establishing financially orientated KPIs such as ROI, which has in turn been shown to undermine the longer-term viability of brands (Bakopoulos *et al.* 2017).

This chapter has contextualised some of the factors that start to shape the media strategy. It underpins the importance of effective media briefing between the client and agency, neither the Cowan & Abratt (1999) and more recent research by Arul (2013) may be fully representative of the information needs of today's media strategists and planners. Further research indicates that there are gaps in the knowledge that is currently being exchanged which is challenging the agencies' ability to perform well and in turn diminishing the level of trust and collaboration between clients and agencies (Cowan and Abratt 1999, Heo and Sutherland 2015, Mortimer and Laurie 2019).

This is a very helpful contribution to this research and starts to address elements that will be explored further of both RQ2 and RQ3.

The final literature chapters build on this and continue to explore the advertising and communication factors that influence media strategy decision making. This will help to give a more comprehensive view of the approaches taken towards media strategy formation and planning and the information, theories and concepts that influence and support the multi-criteria decisions that media strategists make.

Chapter 5: Models and Hypothesis Supporting Media Planning

5.1: Introduction

Chapter 4 identified the importance of a detailed briefing between client and agency to ensure that there is clear agreement on what the business, marketing and communication objectives are before designing the media strategy. It also shows that the media strategist needs to amass a wide range of data to inform their decision making. To support this, there is a stream of research that looks to help media planners identify which media channel, or combination of channels, maybe the most effective to deliver the required communication goals. These draw on the fields of marketing, consumer behaviour, communications and economics, to provide a range of different models and theories that support an array of heuristics used to guide media strategy making decisions.

These models fall broadly into three areas. Firstly, consumer models that help the strategies consider what interactions may be needed to drive the required outcome. Secondly, advertising and communication theories which aim to help understand how message transference may work or can be optimised. Building on this are theories from the communicative effects school of advertising and theories of persuasive communications called response models, the hierarchy of effects models or readiness to buy models, which all consider how advertising might lead people through their decision-making journey. Finally, there is a wealth of literature offered to support the media planner in modelling the inputs, outputs and outcomes of their plans. These are considered further in this chapter.

5.2: The consumer – brand interface

As discussed in Chapter 2, the media planner needs to be aware of, and understand the consequence of their client's marketing ambitions. It is important for planners to understand how consumers decide which brands and products to buy, and the process they go through to make the decision because it is these consumers that they are trying to influence and who will ultimately deliver the marketing objectives (Young 2014, Katz 2019).

Psychologists and behaviourists often talk about the decision-making process (DMP) as shown in Figure 5-1, highlighting the moments that matter as a series of small interactions and actions that people go through (Reynolds and Olson 2001, Stankevich 2017, Solomon *et al.* 2019).



Figure 5-1: Consumer Decision Making Process (adapted from Solomon, 2019 p. 298)

Media planners talk about the customer journey and the micro-moments along the pathway to purchase, or the purchase funnel (Chaffey and Smith 2017, Katz 2019). Framing the marketing and media problem in this way uses a mean-end approach whereby each

marketing problem is framed as a consumer decision or series of decisions (Reynolds and Olson 2009).

To link this to the planned communication, advertising goals are frequently tied to different stages of the consumer decision-making process, offering attitudinal or behavioural elements to make audiences more aware and/or nudge them towards the desired outcome (Sharp 2010, Romaniuk and Sharp 2015). For example, the marketer may be looking to launch a new product or grow their market share, concepts that are linked to the model of the product life cycle which presupposes that products and services move through a cycle from introduction and growth through to maturity and decline - steps that suggest different communication strategies (Näslund 1979, Deemer 1980, Lilien *et al.* 1992, Kotler and Armstrong 2013, Egan 2014, Kumar and Gupta 2016). These build on the ideas of diffusion and adoption of innovation, that help to show how ideas and product usage might spread through different groups of people, from those who are innovators and early adopters through to those that lag behind (Rogers 1976).

Media planners, therefore, need to understand whether they are planning for a launch which might require the creation of broad awareness and supporting information to build knowledge amongst the target audience, or whether they are fighting a tight competitive game within a mature market (Schroer 1990, Christensen and Hansen 2005, Kotler and Armstrong 2013). Similarly, if marketers want to grow their brands, Sharp (2016) offers that it should be a priority to reach the audience, build salience and ensure that marketers are “refreshing and building memory structures around their products and propositions” (p. 181).

The application of consumer behaviour models therefore helps to “visualise what communications have, are, will and must occur” and “reinforce the planners understanding that [they are] trying to stimulate a cultural perception through communication” (Donnelly 1996, p. 28).

5.3: Hierarchy of effects

Building on the principles of a consumer decision-making process, the Hierarchy of Effects model, such as those proposed by Lavidge & Steiner (1961) and Colley's DAGMAR (1961), attempt to show the hypothesised steps that a consumer might go through, although in a relatively linear way, as outlined in Figure 5-2.

	AIDA	Hierarchy of Effects	Adoption	DAGMAR	Consumer Behaviour (outputs)	Information Processing	Online Information Processing	The Consumer Decision
Stage	E K Strong (1925)	Lavidge & Steiner (1961)	EM Rogers (1961)	RH Colley (1961)	H Sheth (1969)	McGuire (1975)	Hofacker (2000)	Katz (2019)
Cognitive	Attention	Awareness Knowledge	Awareness	Unawareness Awareness	Attention	Presentation Attention	Exposure Attention	Needs Awareness
Affective	Interest Desire	Liking Preference Conviction	Interest Evaluation	Comprehension Conviction	Comprehension Attitude Intention	Comprehension Yielding Retention	Comprehension & Perception. Yielding & Acceptance	Preference Search Selection
Behaviour Conative	Action	Purchase	Trial Adoption	Action	Purchase	Behaviour	Retention	Purchase Use Satisfaction

Figure 5-2: Collated Consumer Decision Making Models 1925 – 2019

These belong to the communicative effects school of advertising, within which scholars have established theories around persuasive communications called response models, hierarchy of effects models or readiness to buy models.

According to Heath & Feldwick (2007), the original genesis of these was the analogy between personal selling and selling through advertising which Claude Hopkins (1923) proposed as a rational, information-based approach that assured success (Hopkins 1923, 1986, p. 213).

One of the earliest models, AIDA, [Attention, Interest, Desire, Action], is attributed to Strong (1925) who reviewed several theories of selling that were in common use at the time. AIDA emphasised the need to establish various states of consciousness to drive a successful sale. This is derived from E. St. Elmo Lewis who theorized that to be successful, salespeople had to attract attention (cognition), maintain interest and create desire (affect), and then get action (conation). There are many derivatives of this, including AIDAS - where the addition of 'Satisfaction' recognised the importance of post-purchase reactions "*for the purpose of business-building*" (Sheldon 1911, p. 36). According to Barry & Howard (1990), the basic stages of the AIDA model were followed by the majority of sales and advertising writers for over 60 years and played a key role in shaping the minds of advertising, selling practitioners and researchers.

Whilst the detail and nomenclature of the terms used across the various stages may differ, there is significant similarity within the various models. Essentially, the models reflect the linear decision-making process, moving from awareness to trial, through a variety of steps. Collectively, they suggest that the way to develop effective marketing communications is through the route of cognition, affect and behaviour.

These ACB Model of Attitudes view attitude as a multidimensional construct comprising the three interrelated psychological components: Cognitive, referring to beliefs about the attitude object, Affective being the feelings a consumer has about an object, and, Behaviour (or Conative), which refers to the intention of the consumer towards behaving in a certain way towards the attitude object (Kimmel 2018, p. 247). They imply that consumer actions and attitudes can be understood by considering the interplay of Knowing, Feeling and Doing, and are commonly described simply with the verbs "*Think, Feel and Do*" (Kimmel 2018, p. 248, Katz 2019, p. 15).

The concept of the hierarchy of effects attempts to describe the various relationships between attitudinal components. They are organised in a rational, sequential way, and have been particularly popular within advertising as a method to translate marketing objectives and strategies into advertising media objectives. They provide a structure of progressive levels through which a media planner can propose different media activity and different combinations of media vehicles, with specific measurement, such as advertising awareness, recall, preference, intention to purchase and on to enquiries, web visits and sales (Katz 2019). Supporting this, Carlin (2005) states that media planning has always tended to reflect these views of how advertising might work, which he describes as a supply chain oriented

understanding, where the basic input and output model of the human mind is sequential, concluding that media has historically worked to the principle that:

“ given enough messages consumers could be driven . . . through the sequential vectors . . . of Awareness, Interest, Demand and finally Activating” (ibid, p.2).

However, consumers and consumption are known to be made up of many nonlinear experiences. In addition, a consumer’s journey can regularly involve instances where people are making repeat purchases, return product, upgrade or defect to another supplier. The FCB grid proposed by Vaughn (1980), builds on the concept of the hierarchy of effects and combines it with the concept of high involvement and low involvement categories of products and services, as articulated in Figure 5-3 below. This indicates that the attitude forming behaviour may not always begin in the same way.

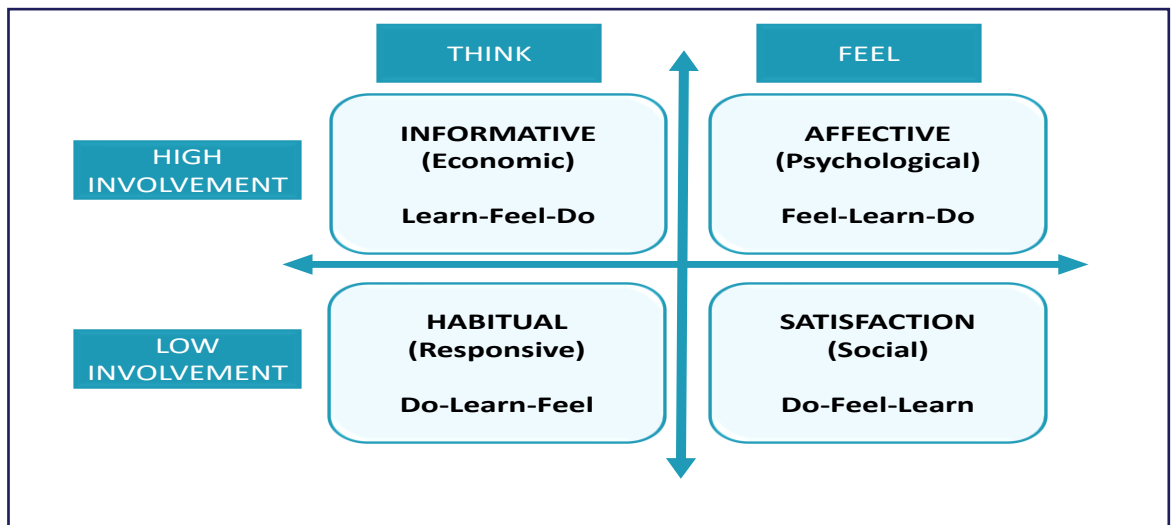


Figure 5-3: The FCB Grid (Vaughn, 1986, p. 58)

Clarifying this further, Barry & Howard (1990) suggested six different hierarchical models to explain how consumption related responses to advertising may differ:

- | | |
|------------------------------|------------------------------|
| 1. cognition-affect-conation | 4. conation-affect-cognition |
| 2. cognition-conation-affect | 5. conation-cognition-affect |
| 3. affect-conation-cognition | 6. affect-cognition-conation |

Donnelly (1995, p. 121) also offered an interpretation of this to show how they could be applied to advertising and media planning for different types of product involvement and level of differentiation [see Figure 5-4].

HIGH INVOLVEMENT / HIGH DIFFERENTIATION Cognitive → Affective → Behavioural
LOW INVOLVEMENT/LOW DIFFERENTIATION Cognitive → Behavioural → Affective
MODEST INVOLVEMENT/MODEST DIFFERENTIATION Behavioural → Effective → Cognitive

Figure 5-4: Hierarchy models applied to involvement and differentiation (Donnelly, 1995, p 121)

More recently, Kimmel (2018, p. 249) explored the psychological underpinning of these behavioural models and offers some clear examples of the various decision types under discussion (see Figure 5-5 overleaf).

Type of attitude	Based on information processing	Based on behavioural learning	Based on experiential consumption
Response sequence	Behaviour (Do) ↑ Affect (Feel) ↑ Beliefs (Think)	Affect (Feel) ↑ Behaviour (Do) ↑ Beliefs (Think)	Beliefs (Think) ↑ Behaviour (Do) ↑ Affect (Feel)
Example	Expensive furniture	Paper towels	Chocolate dessert

Figure 5-5: Three hierarchies of effects (Kimmel, 2018, p. 249)

When applying these concepts to media planning, Donnelly (1995) advised that the planner must determine which learning-decision process best characterises the exchange under consideration. He stated that this is ultimately based upon the planner's experience and insight into the consumer's purchase, usage and decision behaviour. Young (2014, p. 115) refers to these as “*moments of receptivity*”.

These models support the heuristic aspect of media strategy-making, where shortcuts based upon a mixture of data and experience are required. Katz (2019) echoes this and suggests that by understanding how consumers view and use brands, planners can establish the foundations for the media plan and the journey that the consumer needs to go on. However, it need not be so linear. Many studies have contested that any grid formation or hierarchy needs to demonstrate a continuum rather than a dichotomy or categories (Cheong and Cheong 2021).

Reflecting this, within media planning, it is now more commonly referred to as the customer journey or pathway to purchase. Decisions are seen to progress through some form of psychological decision journey but mapping them requires researching and understanding the various attitudes, behaviours and information needs of a particular situation. White *et al* (2004) offer the example of buying a car, where the decision may be extended over a long period of time and where a range of touchpoints, or moments of truth, apply, as seen in Figure 5-6.

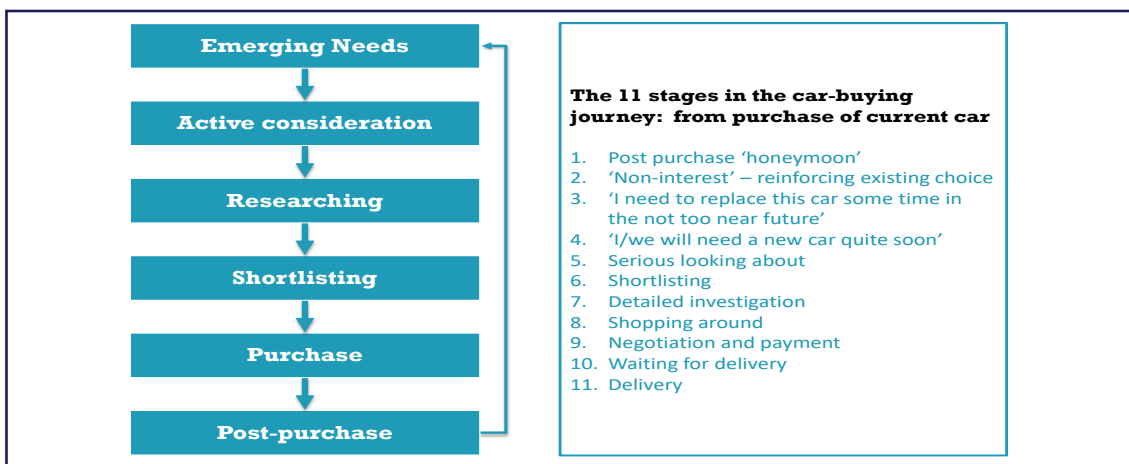


Figure 5-6: Customer Journey applied to car-buying (White, *et al*, 2004, p. 36)

Carlin (2005) notes that it has always been difficult to link the input, or sequence of inputs, to the actual sales or outcomes, which is why media planners used analogues, such as hypothesizing a hierarchy of effects, to represent the presumed change that might occur in reality. For example, at the cognitive stage, this might include modelling reach and frequency levels that should equate to driving the desired change in prompted or spontaneous/unaided awareness measures.

Such hypothesising continues to suggest that advertising success is delivered sequentially, however, digital technologies afford consumers greater power and control over their own media exposure, enabling multitasking, and driving a multiplicity of exposure across multi-sensory dimensions. As such, advertising exposures are no longer guaranteed to be viewed in the planned sequence. Carlin (2005) suggests that one solution is to take a 'demand-side' view of how advertising might work, suggesting that:

“a demand chain view of the process would entail understanding that while awareness, interest, demand and activation are still broadly workable as concepts, the pathways through them are no longer sequential but rather multidimensional and multidirectional” (ibid, p. 3).

Equally, Robertshaw (2017) suggests that digital technologies have broadened the interactions of customer decision journeys, spanning across both digital and traditional offline environments, as consumers engaging with a combination of media channels across a range of devices, and gain “a high degree of superimposition”(2017, p. 121). The blurring of boundaries between online and offline has led to the expression of the omnichannel experience, emphasising the interplay between channels and touchpoints to provide a seamless experience for customers (Rosenbaum *et al.* 2017, Tueanrat *et al.* 2021).

When researching the pathway to purchase, Bakopoulos, *et al* (2017) noted that marketers can maximize the impact of their advertising by aligning creative concepts, formats, advertising units, data, and media to deliver a message that is relevant to the specific moment, but to optimise this, they must start by identifying the “context, intents, and need states” of individuals at key moments in that customer journey (*ibid* 2017, p. 458). Echoing this, Binet and Field (2017) identify the internet as the perfect channel for delivering information on products and prices on demand, when customers require them, and if combined with mobile, can dramatically shorten the customer journey, concluding that “with one-click ordering, and a smartphone in every pocket, activation has never been more efficient”(ibid 2017, p. 42)

Although the hierarchies reflect a relatively linear understanding of the customer decision-making journey, they provide a structure of progressive levels through which a planner can propose different media activity and combinations of media vehicles to build a communication funnel (Barry and Howard 1990, Murray and Vogel 1997, Bruner and Kumar 2000, Banerjee 2004, Smith *et al.* 2009). When used in this way within the media strategy, each stage of the customer journey can be interpreted with relevant media objectives and supported with clear, accountable and measurable KPIs. These might combine both the attitudinal and behavioural factors to track effectiveness at the various stages, such as audience numbers reached, awareness generated, volume of searches generated, frequency of engagement, conversion to purchase or value of repurchase, etc. (Wind *et al.* 2013, Chaffey and Smith 2017, Visser *et al.* 2018, Katz 2019). The media and creative messages transferred

by these routes are important in creating consumer perceptions and therefore it is important that media planners also understand the core premises of communication theory that lead to the moment of potential consumer decision.

The next section therefore explores some of the core communications theories that help planners to understand the consumer-media relationship and how they might contribute to the media strategy making process.

5.4: Communication theory

As a starting point, it is useful to look at the underpinning models of how communication might work. There are many iterations and developments of the mass communications theory proposed by Shannon (1948) which provided a basis for understanding message diffusion and distribution (see Figure 5-7 below). This articulates a one-directional transfer of a message from a transmitter to a receiver through a channel.

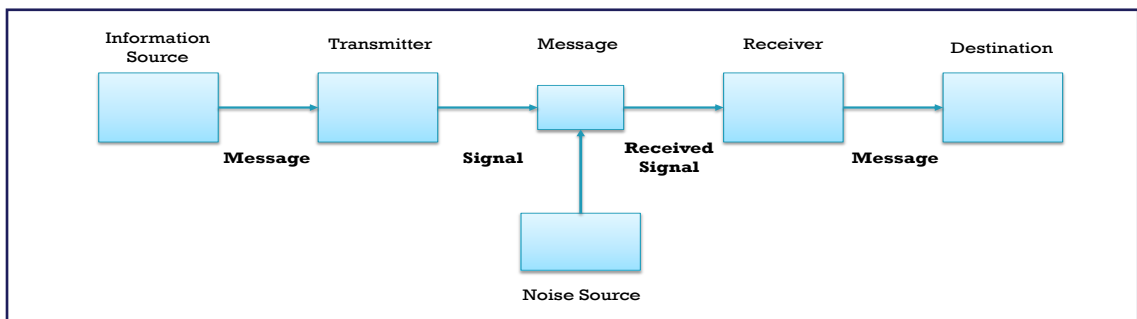


Figure 5-7: A Mathematical Theory of Communication (Shannon 1948)

The Shannon-Weaver model of communication was a popularisation of the original theory and articulates the initial step of the sender encoding the message, prior to sending it via a channel/medium, to be received and decoded by the recipient, later updated to reflect the feedback loop between receiver and sender (see Figure 5-8).

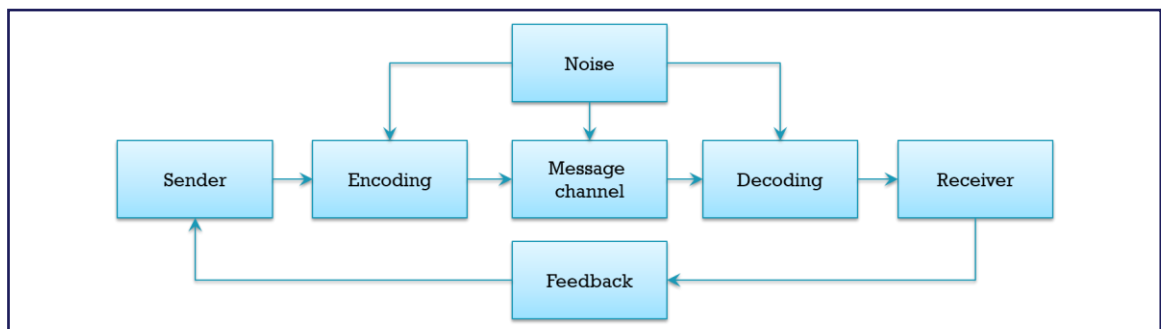


Figure 5-8: The Communication Model (Shannon & Weaver 1949)

Although heavily criticised over the years for misrepresenting the nature of human communicating, the Shannon-Weaver model of communication has persisted as the underpinning of multiple models that try to depict what may be happening particularly within mass communications. Mass communication is seen as the historic domain of advertising and is of interest as it offers the principle of reaching many possible buyers and enquirers quickly and, generally, efficiently. The task of encoding and sending the message being divided between the creative team and the media planner, with the media planner primarily involved

in drawing on consumer insight and their media experience to advising on which channels are the most appropriate to deliver the message successfully.

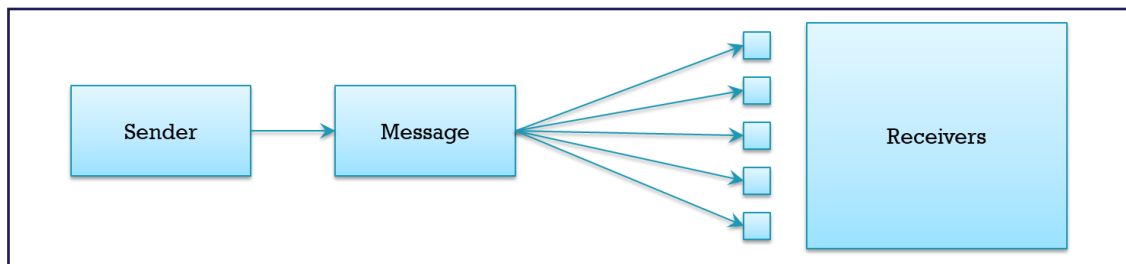


Figure 5-9: One-Step Communications Model (Katz and Lazarsfeld 1955)

This type of mass communication is often interpreted as being a one-step, one to many, communication, with no interaction or feedback loop, as shown in Figure 5-9. But modern digital communication techniques are not well represented by this single-step process, which, as noted by Smith and Taylor (2004, p. 76) suggests that the sender has the “*potential to influence an unthinking and non-interacting crowd*”.

Katz & Lazarsfeld (1955) went on to show that messages are often filtered through opinion leaders, as well as going directly to other members of the target audience. Their research observed voter behaviour during elections, and in particular, those people who changed their voting intention during the course of a campaign. This indicated that the most influential source to determined how people made up their minds was ‘personal influence’, but importantly, there were people who “*exerted disproportionately greater influence on the voting intentions of their fellows*”, people whom they dubbed “Opinion Leaders (OL)” (*ibid* 1955, p. 32). Ironically, when looking at what influenced the OL, they found that most cited mass media. This work became the basis of the Two-Step flow communications model, with opinion leaders and opinion formers, as outlined in Figure 5-10.

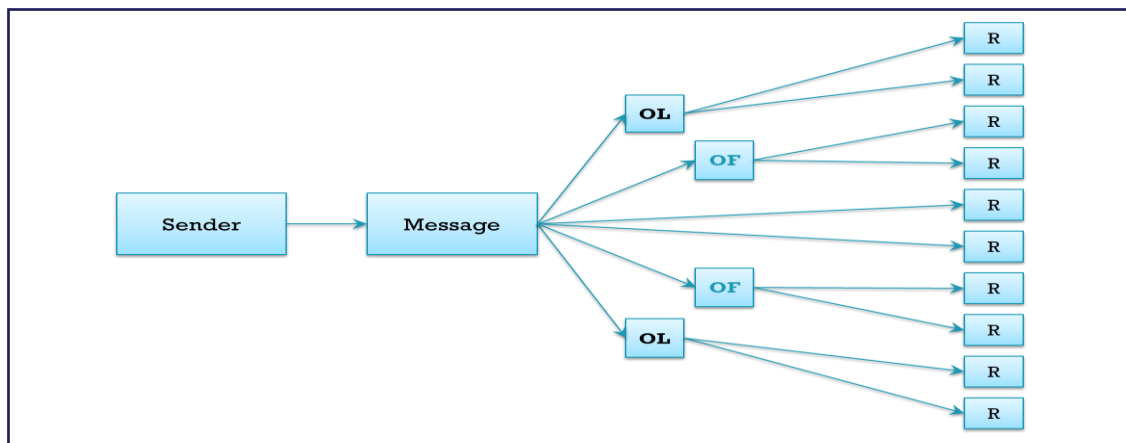


Figure 5-10: Two-Step Communication Model (Katz and Lazarsfeld 1955)

When Leonard-Barton (1985, p. 924) revisited these principles in her study of technology uptake amongst professionals, she noted that it remains unclear whether experts “*actively sway*” undecided opinion or act as “*rallying points around which pro and con opinions can cluster*”.

Newer models, such as that by Smith and Taylor (2004) shown in Figure 5-11, build on these principles to portray how messaging might be intermediated via reference groups, opinion leaders, opinion former and formal experts who have influence. This shows the multifaceted, multistep, multidirectional process of talking, listening and feeding back.

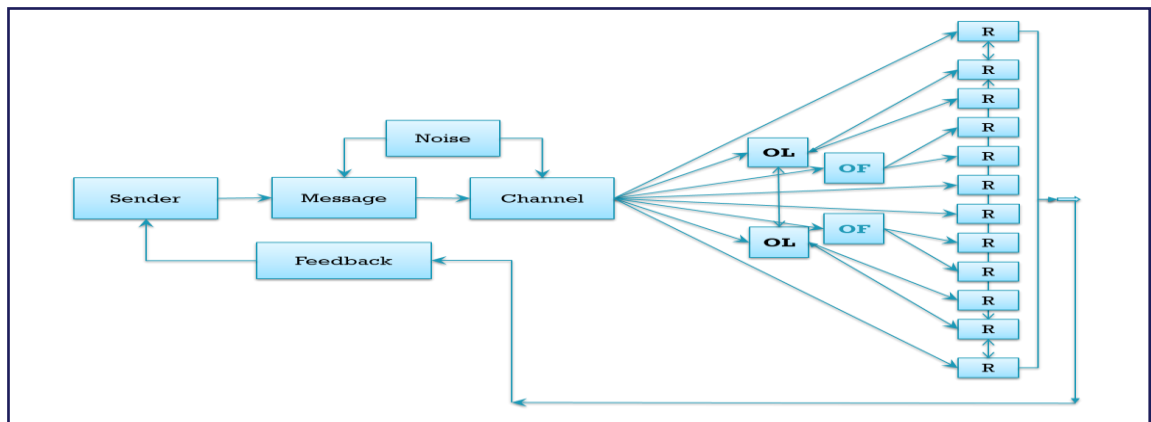


Figure 5-11: Multi-step communication model (Smith and Taylor 2004, p. 79)

This is very relevant to media planners in today’s social media world, particularly with the opportunities offered by individually targeted paid advertising to activate earned media impressions, or when working with influencers and opinion formers such as a YouTuber or Instagrammer. However, Bennet and Menheim (2006) suggest that the digital interpretation of the one-step communication model is fundamentally different, with the “*refined targeting of messages directly to individuals*” through a process of “*individualising*”. They also note that opinion leaders, who were pivotal in the two-step paradigm, are now more likely to “*reinforce latent opinions rather than reframe them*” (*ibid*, p. 213). Adding to this, Hilbert, *et al* (2016) tested the communication flow theories using analysis of Twitter data. Their study identified that individual social media participants mainly referred to intermediating amplifiers of messages, therefore going through a two-step communication flow, while at the same time, traditional media outlets and official voices receive the majority of their mentions through a direct, one-step flow, often from these same participants, stating that:

“In digital platforms, long-standing communication theories, like the 1955 two-step flow model, are still valid, while direct one-step flows and more complex network flows are also present” (Hilbert *et al.* 2016)

Much has been written about this type of sequential interpretation of the process and new ‘multi-media’ models and ‘mediated communication’ models have been proposed (Bennett and Manheim 2006, Fill 2009, 2013, Barker and Roberts 2010, Chaffey and Smith 2013) however, as Fill (2009) states,

“it is probable that no single model or framework is entirely satisfactory. However, there are two particular influences that need to be considered, first the media used to convey the information/message, and second, the influence of people on the process” (*ibid*, 2009, p. 47).

Therefore, when seeking to understand how consumers may receive and interact with promotional messages, it is important for the media planner to map the stages that might exist along the way and identify how they can support or influence that journey. This might involve adding emotional and psychological support as they move towards the proposed exchange or reinforce post-purchase satisfaction to avoid cognitive dissonance.

However, whilst this might help to understand the structure of the campaign, there are further nuances about the consumer-media interface that the planner needs to be aware of. Research shows that consumers ascribe specific attributes to media channels that can influence their decisions and that channel characteristics and context can work for, or against, the content of the messaging (George *et al.* 2013, Jain and Reed 2013).

Therefore, media planners need to understand the consumer's relationship with media and how to leverage consumers perceptions of channels at key points in the customer journey. This type of understanding is often captured in discussion around the characteristics of media and context, which I will look at in the next two sections.

5.5: The characteristics of media

Despite many attempts by researchers to identify which is the most effective medium, the situation is complicated for the media planner by the nature of the audience and their relationship with the media. To help with this, researchers and practitioners have looked at both the tangible, physical characteristics and intangible, more emotional aspects.

For the tangible elements, planners traditionally separated media into various classes around the capabilities and characteristics that derive from their physical format. Inter-media decisions assess the different media, or 'class' of media (television, radio, print, billboards, digital, etc), whereas intra-media decisions compare options within the same class (such as magazines A, B, and C), with, inter-media decisions preceding intra-media comparisons (Donnelly 1996, Sissors and Baron 2010, Katz 2019). To support this, many marketing communication texts provide summaries of the various physical characteristics, often describing them as strengths and weaknesses or limitations to guide role selection (see Appendix 12-5, p. 230). Collections such as these generally cover the physical qualities of media, targeting options, production issues, production lead time and cost generalisations.

In terms of the attitudinal responses associated with the consumer-media interface, some media are noted for their attention-getting properties or social presence, and others for their ability to drive response or immediacy of feedback. Within such classifications, it is possible to see the influence of the hierarchy of effects, as the evaluation considers which aspect of the journey the medium might be most suitable for. But as with all attitudinal aspects, such characteristics are socially derived and influenced by past experience, therefore are subjective and changeable (Dennis *et al.* 2008).

Classifications such as these contribute to the decision making and critical analysis undertaken within the media selection process. However, over-generalisation, or outdated criteria, can mean that media are misrepresented for what they can offer in a particular context. For instance, whilst discussing 'attention-getting' capabilities, they may fail to consider the nature of the relationship between the consumer and the medium and the nature of the communication and creative strategy (Bellman *et al.* 2019).

To increase the usefulness of such classifications and support inter-media decision making, Cannon (2001, p.30) offered a simple dimension model around the consumers' need for information and their capacity to process it. This helped to identify whether an audience

member might be actively looking for, or receptive to, advertising information in different formats. Adding to this, other creative strategy models proposed dimensions such as the consumer's need for information and the capacity of the medium to guide media and creative decisions (Danaher and Rossiter 2009, Percy and Rosenbaum-Elliott 2009). Building on this, Cannon *et al.*, (2011) reconfigured their model to incorporate the concepts of processing capacity and message involvement, as outlined in Figure 5-12.

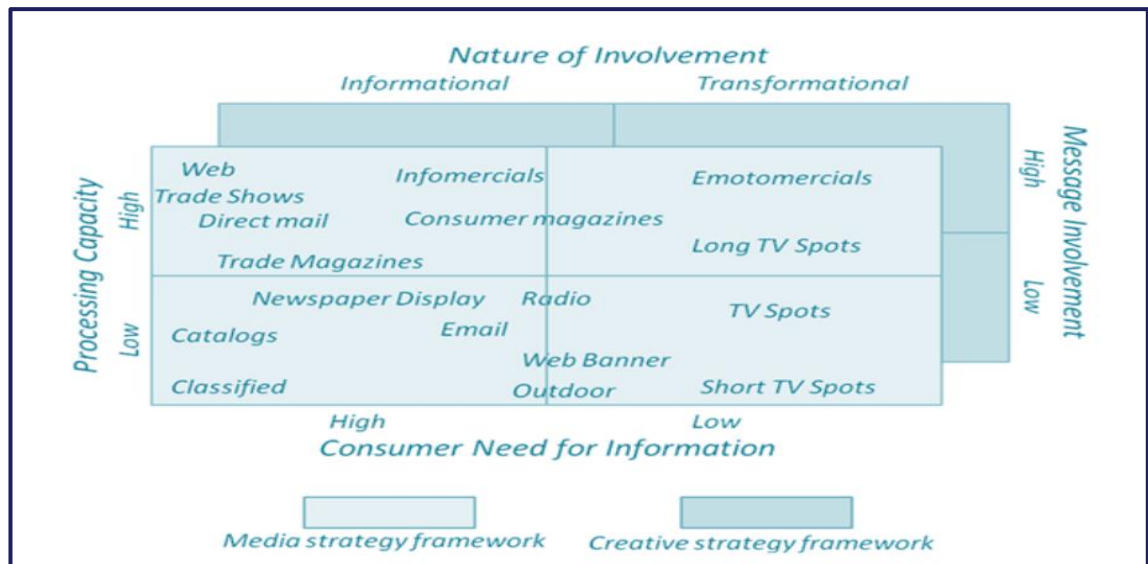


Figure 5-12: The Nature of Media Involvement (Cannon, *et al.* 2011, p. 149)

This type of media role analysis is heavily underpinned by McLuhan's theories around media types, and "his acclaimed aphorism - the medium is the message" (McLuhan *et al.* 1995, Ciastellardi and Patti 2011, p. 15). This suggests that media consumed primarily for entertainment tend to be "processed associatively", while those that are consumed for information evoke "a more deductive mode of processing" (Cannon *et al.* 2011, p. 149).

Dennis *et al* (2008) offered a different insight through the media richness and media synchronicity theory. Media richness theory regards communication channels as possessing a set of objective characteristics that determine their capability to carry information, and that task performance depends on the match, or synchronicity, between the task and those characteristics (Daft *et al.* 1987, Rice 1992, Dennis and Kinney 1998, Dennis and Valacich 1999).

This theory focuses on assessing media performance, which links both media planning and advertising effectiveness. It can help identify why certain physical media capabilities impact how individuals transmit and process messages and provides insight into what might be the most appropriate mix of media. In this respect, Dennis *et al* (2008) acknowledge that the perceived fit between media capabilities and communication task is "just one of a myriad of factors that influence how people choose which medium or media to use", and caution that:

"in this age of digital convergence, specific media tools acquire new capabilities rapidly so that it is no longer appropriate to refer to a specific digital medium but rather the set of features that medium offers" (Dennis et al. 2008, p 579).

Media performance theories, such as media richness, therefore focus on the fact that different communication processes respond to different media capabilities and the way in

which a physical media characteristic may or may not facilitate the necessary interaction for the development of meaning or sharing (Dennis *et al.* 2008, Miranda and Saunders 2012).

These considerations have been applied to social media selection by combining physical media richness criteria with more attitudinal attributes, such as comparing personal versus private space (see Figure 5-13). The evaluation identifies that different messages or target groups should be addressed by different social media channels, whilst acknowledging that lines between professional and personal communications are becoming blurred as employees are increasingly building personal business social networks in the new semi-public/private spaces (Dutta 2010, Kaplan and Haenlein 2010, p. 62, Effing and Spil 2016).

		Social presence / Media richness		
		Low	Medium	High
Self-presentation / Self-disclosure	High	Blogs	Social networking sites (e.g. Facebook)	Virtual social worlds (e.g. Second Life)
	Low	Collaborative projects (e.g. Wikipedia)	Content communities (e.g. YouTube)	Virtual games worlds (e.g. World of Warcraft)

Figure 5-13: Classifying social media characteristics (Kaplan & Haenlein, 2010, p. 62)

To aid the media planner further, a number of studies have tried to evaluate which media channel, or combination of channels, is most effective in delivering different communication objectives.

Meulders & Roozen (2011) sought to measure perceptions of channel effectiveness against a range of attitudinal measures, such as engagement, persuasion or brand experience, etc. They found that traditional media channels, such as television, were more effective than non-traditional media channels, (e.g. the web) against a range of measures relating to attitude (cognitive, emotional and conative) and awareness (recall and recognition). This echoes other findings relating to television’s effectiveness at getting the viewer’s attention (Nagar 2009, Rubinson 2009). Likewise, Danaher & Rossiter (2011) found that the traditional channels of television, radio, newspapers and direct mail retained their attributes of trust and reliability of information, even amongst ‘tech-savvy’ younger consumers.

When Pfeiffer and Zinnbauer (2010) researched the role and value of various channels, their data showed that for an online pure-play, online channels were good at driving activity in the later stages of the funnel, once it had gained reasonable awareness and brand equity. However, they also argued that to build brand strength to a broad audience, or to actively convey a brand's positioning relative to its competitors, classic broader advertising remained a necessity. Their study reinforces the fact that advertising goals are frequently tied to ideas such as the hierarchy of effects or purchase funnel, which requires both attitudinal and behavioural elements to nudge audiences towards the desired outcome (*ibid*).

More recently, Tsang and Wei (2020) explored the impact of media richness on mobile advertising. They measured consumer behaviour across five different cognitive stages, including attention, interest, search, action, and share (AISAS) and found that media richness had a greater influence on the earlier three stages (AIS), and suggest that firms should choose high richness media for the earlier stages of their customers’ journey despite its higher cost.

Research such as this continues to inform the strategies that media planners employ, reinforcing the fact that effectiveness is influenced by channel choice and appropriateness of the communication. Within these studies, researchers are trying to address the media planners' issue around the role of individual channels and vehicles within the media mix, moving beyond the physical characteristics to determine what the communication effect may be. This is an important step in the suggested planning process as it reinforces the aspect that media planning is not driven by merely selecting the most cost-efficient medium, and that in fact, this is a secondary consideration to selecting the right medium to convey the message. It starts to recognise the need to blend art and science, and opens up the possibility of media planners looking to serious media theory to help structure their recommendations...

“ even with a range of optimisation models from which to choose, at the heart of media planning there still remains the need to balance art and science. Artistic ability, as well as experience, product type, target audience, budgets, etc., are essentially integrated with scientific modelling” (Sudbury and Tariq 2010).

A further consideration for the inter-media and intra-media decision making stages is the environment that the medium can offer. This is often considered along with other aspects of context which is explored in the next section.

5.6: The question of context

There are many studies, expanding over nearly seventy years, that consider the relative importance of context on the advertising effect. It is a discourse that continues to be important, particularly within the current market of digital advertising, where many campaigns are being placed on unknown sites and without impact measurement.

Media context is described as:

“ characteristics of the content of the medium in which the ad is inserted as they are perceived by the viewer/reader” (De Pelsmacker et al. 2002, p. 49) or

“ quality of the medium from a consumer point of view” (Malthouse et al. 2007, p. 7).

It refers to the subjective aspects of the media space in which the advertising is embedded, and the consumers' qualitative experience of that medium. It has been shown that the context can make some reader/viewer 'needs state' more salient, and in turn, stimulate the motivation to pay more attention to the associated advertising. Young (2014, p. 118) refers to this as delivering receptivity – finding the right viewers mind set via the right context.

Research into context effects seeks to assess the degree of attention transfer that might or might not take place and whether it improves the overall effectiveness of the advertising message (Cannon 1982, De Pelsmacker et al. 2002, Ahrens 2014, Stipp 2018).

A number of different techniques have been proposed to help quantify context effects but the situation is complicated by the fact that there are multiple elements that can create noise within the data, including the creative message itself, its position within the medium/vehicle, the editorial or programme environment, the presence of other advertisements, and of course, the audience (Cannon 1982, Hatcher 2005, Xu and Wyer Jr 2010, Kwon et al. 2019). Echoing this, De Pelsmacker, et al, (2002) identified three core categories that can influence advertising effectiveness. Firstly, the characteristics of the message stimulus. Secondly, the

characteristics of the person/viewer/reader. Thirdly, the situational factors, which included the environment of the viewer/reader at the time; the nature of the media vehicle and its potential to influence the perception of the ads embedded within it; the characteristics of the medium; the influence of the number or sequence of messages, and, of course, the media context itself. Because of these complications, early media models recommended using managerial judgement to factor in these qualitative aspects (Brown *et al.* 1957, Brown and Warshaw 1965, Gensch 1970, 1978, Sissors and Petray 1976) but studies have continued to try and identify the nature of the influence that may be exerted. These include advertising-context congruence, involvement and transportation effects and the emotional resonance of the various different aspects of media context.

Advertising-context congruence

Research has shown repeatedly that context can influence the perception of the advertising within it and can help make advertisements more, or less effective, although this often fails to explain exactly which effects are being referred to (De Pelsmacker *et al.* 2002, Stipp 2018).

Style congruence has been shown to lead to a positive evaluation of the content and the advertising within it, with the expertise, or prestige of the environment rubbing off, or spilling over, onto the advertising (Aaker and Brown 1972, Aaker 1975). Similarly, congruence between the values expressed within the copy and the context can have a positive influence (Cannon 1982). More specifically, program liking and attitude towards the ad linkage is strengthened if the advertisement and program are similar in emotional content (Coulter 1998), although, using humorous content within humorous programmes was shown to have a detrimental effect on product recall (Perry *et al.* 1997). When evaluating the persuasive effects of advertising, it was found that positive context-induced moods were associated with more favourable evaluations of the accompanying advertising, but negative context-induced moods leading to less favourable evaluation (Gardner and Wilhelm Jr 1987, Aylesworth and MacKenzie 1998). Kamins *et al.* (1991) also studied television advertising-programme mood congruence against measures of ad likability and purchase intention. They showed a Consistency Effect, where a happy commercial viewed in a happy program received more favourable evaluation than the same commercial viewed in a sad programme. Conversely, sad commercials performed better in a “*sad context, relative to a happy one*” (*ibid*, 1991, p. 11). Equally a number of studies have shown higher ad-recall for commercials placed within viewers favourite programmes (Clancy and Kveskin 1971, Galpin and Gullen 2000, Shepherd 2001) and from product-programme congruence (Kennedy 1971, Schumann and Thorson 1990, van Reijmersdal *et al.* 2010, Cauberghe *et al.* 2011).

However, there is also research to suggest that context can have no effect, or even the very opposite, such as the contrast effect, which suggests that a message style that contrasts with the context can lead to more positive advertising effects, where the novelty of the ad and the unexpectedness can increase the level of attention because it is perceived as innovative and interesting (Horn and McEwen 1977, Meyers-Levy and Sternthal 1993, Meyers-Levy and Tybout 1997).

It has been suggested that the moderating factor for these seemingly contradictory results may be environment likeability or product category involvement. According to De Pelsmacker, *et al* (2002 p. 58) the interaction between congruency and product category involvement is particularly apparent when ads are for low involvement products but can lead to a positive affective reaction when the similarities evoke relevant knowledge, compatible mood structures and associations.

Involvement or transportation effects

The degree of media involvement, or transportation, has also been assessed as a factor. Transportation is described as the extent to which the reader/viewer is absorbed into the narrative flow of the story as it unfolds (De Pelsmacker *et al.* 2002, Wang and Calder 2006a, 2006b, 2009). Involvement research has tested the uplift in recall found between placing advertising within editorial and programming that is believed to be more involving, or by juxtapose entertainment with more rational and news focused environments. It was found that transportation positively affects advertising when it does not intrude on the transportation process. The concept of involvement, or transportation, has been criticised by some researchers because it is defined both broadly and differently, but for Malthouse *et al* (2007, p. 8) involvement is about getting “*something worthwhile*” from reading it, and getting “*caught up*” while reading it. They demonstrated that all other things being equal, an advertisement placed in absorbing content is worth more than the same ad placed within less absorbing content. But they also noted that content that was dull or disliked did not have a negative effect on advertising messaging. Operationalising this research for digital media, Malthouse and Calder (2010, p. 228) recommend that media planners and advertisers use this data to generate a framework that enables them to “*factor relevant engagement metrics*” into their planning and buying decisions.

However, it was also found that when an ad was placed in highly involving, or transporting stories, in such a way as to interrupt the experience, it led to a less than favourable attitude towards the product. When viewers & readers were highly transported, they saw the ads as being highly intrusive, which was detrimental to ads effectiveness. Therefore, perceived intrusiveness mediated the effect of transportation on product attitudes (Wang and Calder 2006a, 2009, Ying *et al.* 2009).

This factor might help interpret why consumers are choosing to use technology-driven ad avoidance techniques, through the installation of ad-blocking techniques to remove unwanted and irrelevant advertising. According to Seyedghorban *et al* (2016, p. 125) internet users “*perceive online ads to be less distractive and disruptive*” and feel more in control when using adblocking. But ad blockers do not differentiate as to whether the targeting strategy was to dominate a channel or to customise and personalise the advertising experience based upon the customer’s online behaviour, they simply prevent the messaging (Lamberton and Stephen 2016). Research suggests media planners need to rethink some of their planning approaches and measure the “*positivity and impact of experiences, not just the reach*” (Blades and Tavgac 2016, p. 3). Along with this, of course, customers have become wiser to the games being played by brands, and although media and technology have created more

opportunities for involvement, for some it is just irritating. This is particularly true within digital mobile where a number of key trends are negatively affecting the placement of advertising. On the publisher side, many mobile content providers have moved from the advertising funding model to a subscription funding model, which removes many of the advertising opportunities and causes overuse of the remaining inventory and increased clutter, described by Ha and McCann (2008, p. 570) as “*the presence of a large amount of non-editorial content in an editorial medium*”. Clark, et al (2018, p. 312) adds that the problem is exacerbated by the way today’s non-editorial content is presented within the editorial content which can “*shift the salience and, ultimately, the perception of advertisements as helpful or as clutter*”. In response, there is now growing, industry-led, support for wide scale self-imposed ad blocking to reduce the quantity of advertisements that disrupt the customer experience, interrupt content and slow browsing, so as to maintain interest and engagement for quality advertising content (Coalition for Better Ads 2019). Factors such as these impact strongly on the decisions that underpin the media strategy.

Using neuroscience to measure emotional engagement

Neuroscience and neuromarketing techniques have been used over the last decade to deepen insight into the consumers-communication effects and is being combined with new methodologies to replicate previous research studies and explore a wider range of media, including the effects of context. For clarification, Ramsøy (2019) confirms that consumer neuroscience encompasses the basic research questions addressing how consumption choices are made, whereas neuromarketing is defined as the commercial use of neuroscience tools and insights. The use of biometrics, such as eye tracking, skin conductance, and heart rate, can offer a deeper insight into consumer responses to both content and advertising, and how they affect consumer perceptions, processing and response to advertising messages, leading to a better understanding of the role of emotions (Marci 2006, Siefert et al. 2008, Stipp 2015, 2018, Bellman et al. 2019), although, as acknowledged by Ford, (2019, p. 257), no tool can deliver “*fully accurate readings of consumer intention*”.

Using television commercials and a variety of programme contexts, Marci (2006) used a combination of signal processing to generate continuous time-locked indexing of physiologic synchrony and intensity that corresponded with attention and emotional impact, resulting in a measure of engagement. The research found that television commercials were more engaging when placed in successful, popular/higher quality programming, and suffered significant, and potentially negative, effects when placed in poor programming. Steele, et al (2013) also used neuroscience, in the form of biometrics and eye tracking, to show that brand advertising was more emotionally engaging when experienced on television alone or combined with online viewing, and that the emotional connection was strongest when the television program and website content were related. Equally, Bellman et al. (2016, 2019) explored the influence of creative devices, such as humour, and viewing context on commercial effectiveness by using facial tracking software. They confirmed that program-ad matching effects applied primarily to informational ads and negative or nonpositive ads, whilst positive ads perform equally in any program context.

These techniques are also being used to explore the impact of ad clutter and competing advertising within the same environment. This can be assessed in terms of the number and nature of the competing ad presence and the sequencing of those competing ads, which is often looked at from the perspective of clutter. Advertising clutter is usually perceived as an amount of advertising content that exceeds that which the consumer believes is acceptable. It is therefore highly subjective and can be influenced by a range of factors (Ha 1996, Ha and Litman 1997). Ad clutter has been seen to impair recall and recognition of commercials, however, as seen with context, the negative effects of ad clutter may be moderated by the level of involvement (Cobb 1985) and brand familiarity (Webb 1979; Kent and Allen 1994). Because definitions are so reliant on consumer perceptions, Ha and McCann suggest that the amount of advertising may actually play only a small role in creating positive or negative advertising effects, and that receptiveness towards advertising is “*affected more by attitudes towards advertising, the specific media contexts and the task orientations of their audiences consumers*” (Ha and McCann 2008, p. 570).

Building on this Zanjani, *et al* (2011) found that information seekers perceive less ad clutter when ad-context congruity was high, which in turn improved ad recognition. Their research also suggested that seekers recalled and recognised fewer ads than surfers, however, as demonstrated in Figure 5-14, ad recall can be mitigated by heightening ad-context congruence and relevance, which reduces the psychological interruption, as identified previously with high involvement contexts, and “*is consistent with priming interpretation which predicts that congruity between ads and content increases memory*” (Zanjani *et al.* 2011). This suggest that ad avoidance is not directly linked to clutter and that there is no direct correlation between the level of clutter and the audiences ability to recognise or recall information, in that, the level of effectiveness is not halved when the volume of advertising doubles (Zanjani *et al.* 2011).

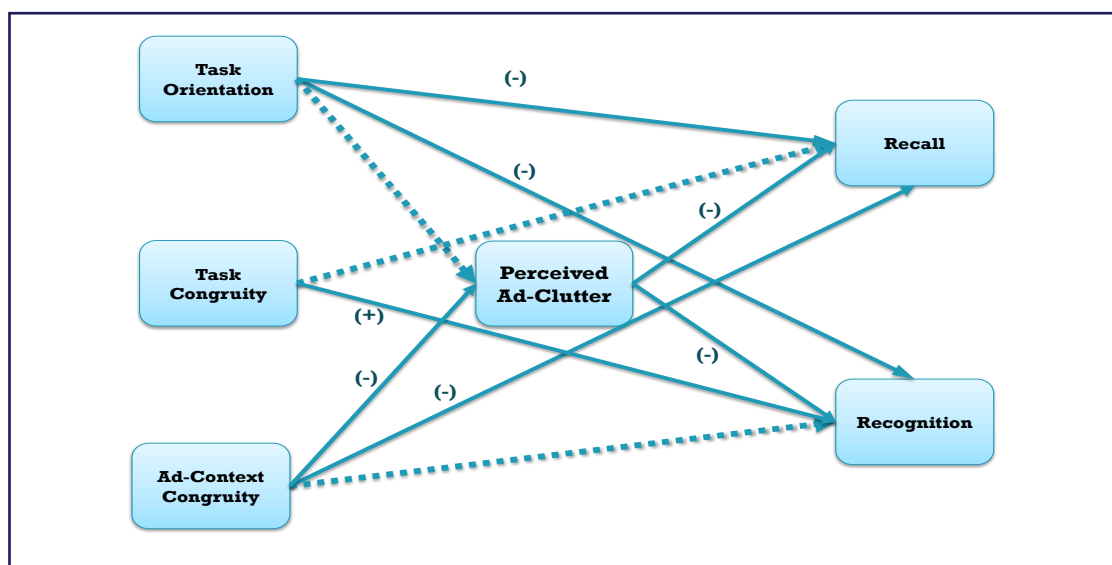


Figure 5-14: Mediation Model (Zanjani *et al.* 2011, p. 75)

However, the media context effect shows that content involvement exerts an influence, which Bronner and Neijens (2006, p. 86) suggest follows a path of three steps. The first step

being the choice of medium and experiencing it; the second being from experiencing the medium to experiencing the advertising, and the third step being from advertising experience to advertising effectiveness. One explanation given is that certain contexts may activate knowledge structures that make information processing easier. Ads that reflect elements or moods that the context has created for the reader/viewer may also be processed more easily, which is called the mood congruency-accessibility effect, or priming principle (De Pelsmacker *et al.* 2002, Bronner and Neijens 2006, Wang and Calder 2006b, 2006a, 2009, Malthouse *et al.* 2007, Malthouse and Calder 2010).

Neuroscience based methods add further understanding and distinguish several processes that lead to the context effect. Stipp (2018) suggests that these can be clustered into two groups - attention transfer and priming effects, as summarised in Figure 5-15 below.

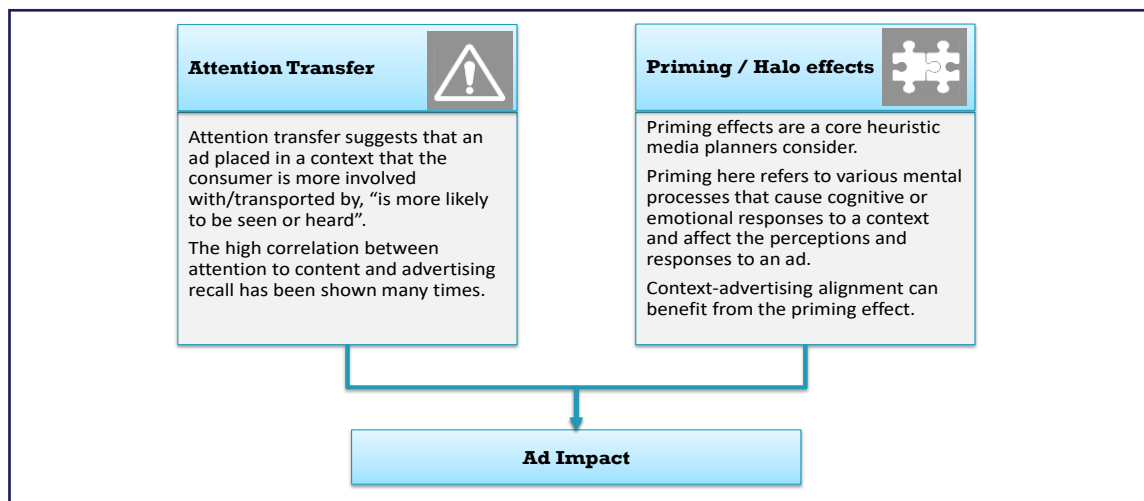


Figure 5-15: Context effects triggers (Stipp 2018, p. 141)

Combining this type of understanding is leading to some highly scientific work that should allow planners to improve the overall effectiveness of their campaigns. One such study links motivational targeting with context, with the aim of maximising the uplifts seen from positive correlations and congruency of mood creating environments and propositions (Stipp 2018, Harvey and Shirole 2019), in fact, the Advertising Research Foundation (ARF) now considers that best practices in media planning should consider both targeting and context as equally important, advising planners that they should seek to reach people most likely to be responsive to the specific ad. Altogether, Harvey and Shirole (2019) identified 265 psychological motivators, labelled “DriverTags (DTs)”, to express 86 Need States and 15 Values Domains, to link creative content and people, building a framework of Resonance scoring for the targeting of people more, or less likely, to be motivated by a specific ad. Within the study, applying higher resonance scores to airtime selection delivered an increase in brand metrics, such as unaided awareness and purchase intent.

Much of this research has been conducted within television and print advertising and explores the nature of the contextual links created between the environment and the creative messages. However, digital media capabilities are broadening the definition of context to include the media platform or brand, the device, the time and place, and even weather conditions (Snyder and Garcia-Garcia 2016, Stipp 2018). Therefore, the current context can

now refer to “any situational aspects of the potential exposure”, and knowing any aspect of “who, what, when, where, why and how” can be useful (Malthouse *et al.* 2018, p. 776). With this in mind, there has been a distinct resurgence of interest in contextual relevance and contextual targeting, driven in part by concerns around brand safety and the need to fight advertising avoidance (Cannon 1982, De Pelsmacker *et al.* 2002, Hatcher 2005, Stipp 2018) but also by the moves by many browser providers, in the face of rising privacy concerns, to disable third party cookies which have underpinned much of the programmatic trading to date where ‘contextual planning’ is seen as a new technique for delivering relevance (Palos-Sanchez *et al.* 2019, Shehu *et al.* 2020).

To take this forward, planners need to understand the motivations and benefits contained within the creative message. Together, this would drive stronger integration of the media planning and creative development and provide greater opportunity to identify contextual relevance.

For the media planner, alongside considerations of the context of the space and time to be used for the advertising, they must also consider the weight of campaign activity that will be used in each medium. This is considered within the next section that reviews the literature around structuring the media mix and determining aspects such as reach and frequency.

5.7: Balancing budgets and media channel selection

Once a planner has established their theoretical customer journey/s, they will look at the characteristics required from the media to transfer the marketing communication to drive that journey. The next step is to consider the weight of activity for each medium selected.

Weight has often been described as a combination of reach and frequency. The reach of the plan indicates the percentage, or number, of the target audience that has the opportunity to interact with the brands advertising creative message, whereas the frequency, or “*effective frequency*”, establishes how many times that audience needs to interact with the message for it to have some effect (Katz 2019, p. 50). However, as technology facilitates more individual-level research and the ability to track individual consumers, maximisation is increasingly centred on individual influence through the customer journey rather than the more aggregated reach and frequency data. Criteria can now be related back to behaviour with opportunities to act, or attitudinal measures such as changes in brand attitudes or purchase intent (Aaker and Brown 1972, Bellman *et al.* 2010, Cheong *et al.* 2010, Assael 2011). To assist with this question, a number of studies have tried to identify what might be the right weight of advertising.

Jones (1990) investigated the relationship between the weight of advertising as evidenced by advertising expenditure, sales and market share. He compared market share and share of voice data over 1,096 brands to test the hypothesis that large brands are less advertising intensive than small brands. He noted that in most markets bigger brands can spend proportionally less to achieve their impact, developing the Advertising Intensiveness Curve to model this. Rationalising the findings, he noted that larger campaigns generally benefit from economies of scale and larger volume discounts, thereby delivering more for the

money. However, a contributing factor was also the fact that many larger brands ‘milk’ their established products, often with the result that downturns projected by brand life-cycle theories becomes self-fulfilling as shown in Figure 5-16. In addition, new brands often use ‘heavy infusion’ of unprofitable advertising at launch (*ibid* 1990, p. 39).

Revisiting this work, Christensen and Hansen (2005) agreed that whilst there may be noticeable variations between product categories, larger brands generally tend to have the ability to underspend on advertising without a loss of market power and dominance, but not indefinitely.

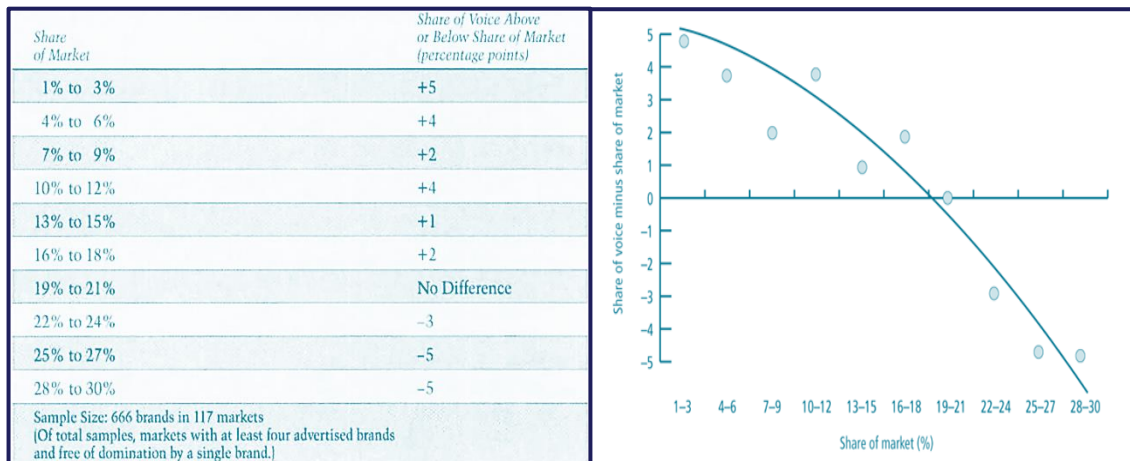


Figure 5-16: Market Share/Share of Voice comparison with resulting Advertising Intensiveness Curve (Jones 1990, pp. 40–41, Jones and Slater 2002, p. 208)

Applying the principles of double jeopardy, as posited by Ehrenberg, *et al* (1990) adds a further interpretation, suggesting that brands with larger penetration of the market also enjoy greater frequency of purchase, which combines to increase market share, whilst the smaller brands have to work harder to sustain similar loyalty.

Therefore, it is not simply a case of spending more to build your market share. In fact, Jones (1990) concluded that the advertising elasticity of most brands is low, with limited potential for sales to parallel increased advertising, and that any additional sales generated were unlikely to be as profitable. This is reflective of the law of diminishing returns and was captured by Schroer (1990) in the S-shaped curve of the ‘Advertising Response Function’ shown in Figure 5-17.

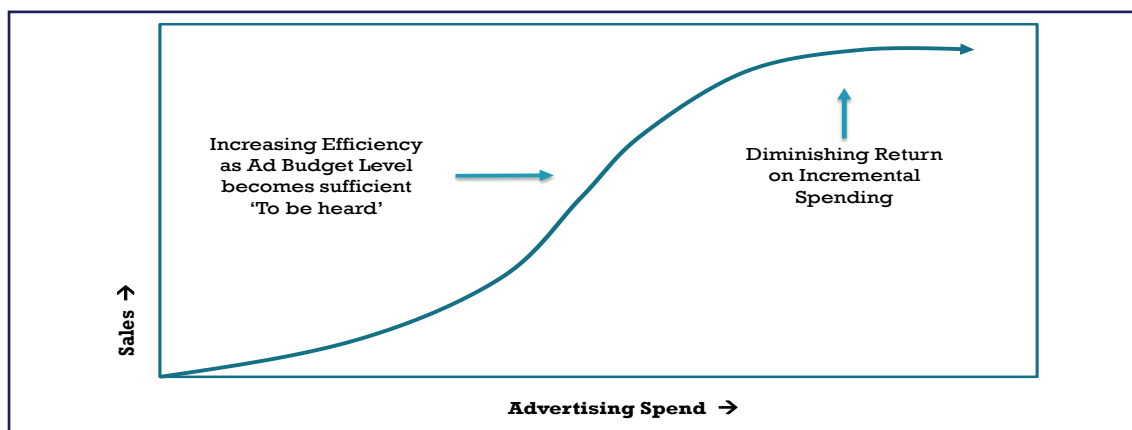


Figure 5-17: Advertising Response Function (Schroer, 1990, p.47)

This clearly suggests that the productivity of the advertising budget rises prior to reaching a plateau and then diminishes. The law of diminishing returns is reflected in many of the decisions taken by media planners and is discussed in greater depth in the next section.

5.7.1 The law of diminishing returns

The Law of Diminishing Returns is a foundational theory of economics (Brue 1993) which can be traced back to the work of Anne Robert Jacques Turgot [1767] who stated ‘it can never be assumed that double the advances will yield double the product’ (Turgot 2011, p. 131). This theory has been applied to media planning in many ways, such as moderating media weights, modelling frequency of repetition and projecting effective exposure, as shown in Figure 5-18, which highlights that as the number of exposures increases, their effectiveness or value decreases.

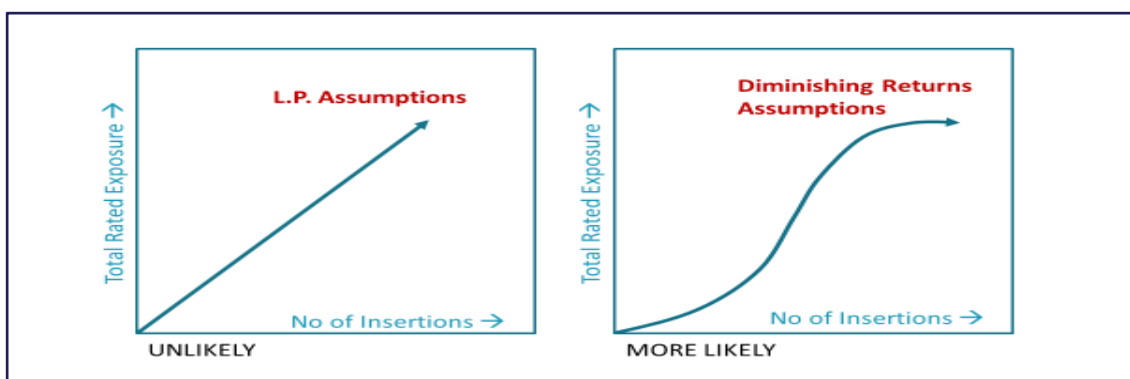


Figure 5-18: Theory of Diminishing Returns of Repeated Exposure (Calantone and de Brentani-Todorovic 1981)

This also reflects the pattern of response attrition seen by direct response advertisers (Cannon and Riordan 1994, Barker 1995, Mesak and Means 1998, Page *et al.* 2018). Therefore, there is an optimum point at which activity becomes less effective. This is also a balancing factor within the consideration of share of voice, especially for brands that dominate a market.

The principle of diminishing returns has also been explored in relation to the broader palette of media channels that now exist. In their research Data2Decisions and Thinkbox confirmed that as media spend increases, diminishing returns will be seen as the medium starts to approach saturation, as shown in Figure 5-19.

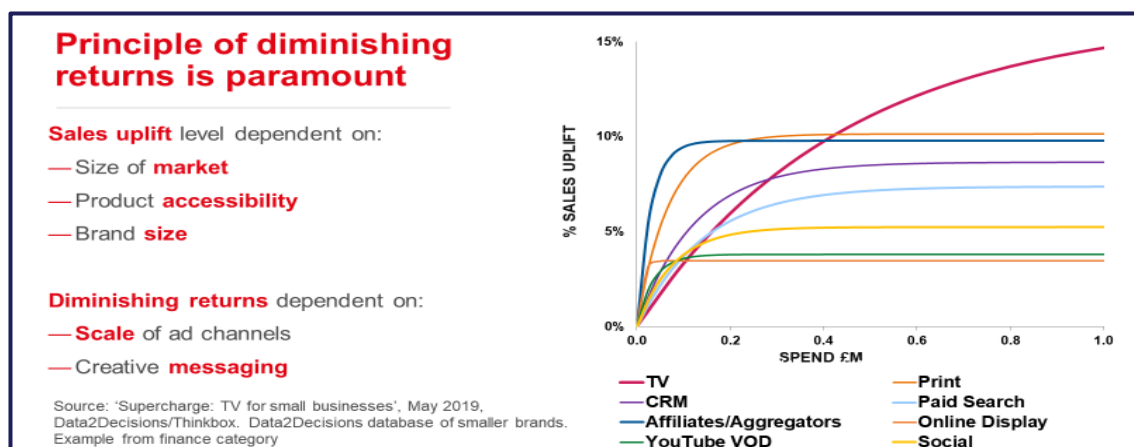


Figure 5-19: Principle of diminishing returns by channel (Thinkbox 2019)

Echoing some of the previous research, it also showed that some channels, such as traditional TV, saturate more slowly than others, which means they have a greater potential to drive growth. The principle remains important for media planning and budget optimisation and can be used to maximise profit from marketing.

This raises the debate as to whether a media planner should be putting all the budget into one medium or spreading it across a broad selection of appropriate channels. This discussion is reflected in both the media dominance model and debates around media synergy.

5.7.2 Media dominance models

The Media Dominance Model echoes the points that concentration in one medium, or vehicle, will bring diminishing returns, therefore advocates moving between media to build optimum levels of coverage and frequency in each, however, the exact number of insertions per vehicle is left for the expert to determine (Calantone and de Brentani-Todorovic 1981, Zhao *et al.* 2019). This model reflects the focus on maximising reach but emphasises a siloed approach to determining the combination of media, where the perspective is additive and incremental, focusing on one medium at a time (Assael 2011). More recently, this principle was deliberated on by Romaniuk and Sharp (2015, p. 123) who propose that to achieve the optimal reach of the target audience, media planners should aim for the biggest reach medium first, then only add to this if you can achieve more unduplicated reach by looking in different media families. In their view “*reach is the foundation of a sound media strategy to build mental availability*” (*ibid*, p. 124). To support this, Romaniuk and Sharp offer evidence from multiple research studies and the application of ‘Double Jeopardy’ (Ehrenberg *et al.* 1990, Nelson-Field 2012, Graham *et al.* 2018) to the principle that the largest reach will be achieved from the largest media, but also that those impacts will be duplicated less frequently across smaller-scale media. The question of how to evaluate multi-platform activity and whether it is more powerful than single-channel solutions remains heavily debated and is far from being resolved with the continued proliferation of new media options (Romaniuk 2012a, Taylor *et al.* 2013, Laroche *et al.* 2014).

Once the media planner considers an additional media option, perhaps to increase reach, or to support different stages of the customer journey, there has to be deliberation as to whether the media in question will be complementary, or whether they will merely duplicate each other’s efforts, therefore proving to be less cost effective. This question has been debated widely over the last two decades under the topic of media synergy.

5.7.3 Media synergy

Schultz, *et al* researched cross-media synergy and concluded that certain combinations of media can drive results that will be bigger than would be expected from just using the individual media on their own, and that such gains, or synergies, are a positive trackable outcome for the campaign (Schultz 2006, Schultz *et al.* 2009a, 2009b). This is because synergies happen at the consumer level, highlighting that it is the consumer that creates the cross-media consumption. Media planners, therefore, should research the media

consumption of the target audience to understand and maximise the opportunities that might exist to create synergy (Schultz *et al.* 2012, Dens *et al.* 2018).

Synergies such as these have also been described as the ‘media multiplier’, or ‘halo effect’ and researchers have attempted to quantify the uplift effect that might be created between different media (Confer 1992, Millward Brown 1998, Helske 2001, Consterdine 2003, Jenkinson and Branko 2004). Confer (1992) noted that all the evidence pointed to the fact that mixed-media campaigns were more effective than single media alone and urged that if a mixed-media approach was not possible, “advertisers should require a lot of convincing that it is worth accepting the penalties in loss of communication power, reach, and frequency” (*ibid* 1992, p. 11). Other studies have investigated traditional media alongside the Web to calculate the possible duplication or synergies, that might exist (Naik and Raman 2003, Schultz 2003, Kitchen *et al.* 2004, Schultz *et al.* 2009a, 2009b, Schwaiger *et al.* 2010, Assael 2011), to understand how best to combine media channels to optimise effectiveness (Chang and Thorson 2004, Kanso and Nelson 2004, Dens *et al.* 2018, Dong *et al.* 2018, Jayson *et al.* 2018) and postulate various conditions for optimising media synergy and simultaneous media usage (Naik and Raman 2003, Pilotta *et al.* 2004, Dijkstra *et al.* 2005, Schultz *et al.* 2009a, 2009b, Chatterjee 2011, Taylor *et al.* 2013, Roux and Waldt 2017).

Overall, the common finding is that when consumer messaging is reinforced across two or more different media types (or class) consumer recall is heightened. Supporting this, neuroscience techniques have shown increased brain activity when consumers see a successive campaign execution in different media compared to seeing single executions.

However, even when building such single media or multi-media campaigns there are further factors to consider, such as how the media impact will be phased, or flighted.

5.7.4 Campaign flighting and the wave theory model

The Wave Theory Model, as outlined in Figure 5-20, represents the contrast between continuity of advertising and the need to build coverage and frequency within specific time periods. A variety of campaign flighting scenarios now exist in an attempt to respond to varying campaign objectives but also in response to a better understanding of memory and carry over (Lodish 1971, Schultz 1979, Reichel and Wood 1997, Naik *et al.* 1998, Kisielius 2001, Tellis *et al.* 2005, Brusco 2008, Sawyer *et al.* 2009).

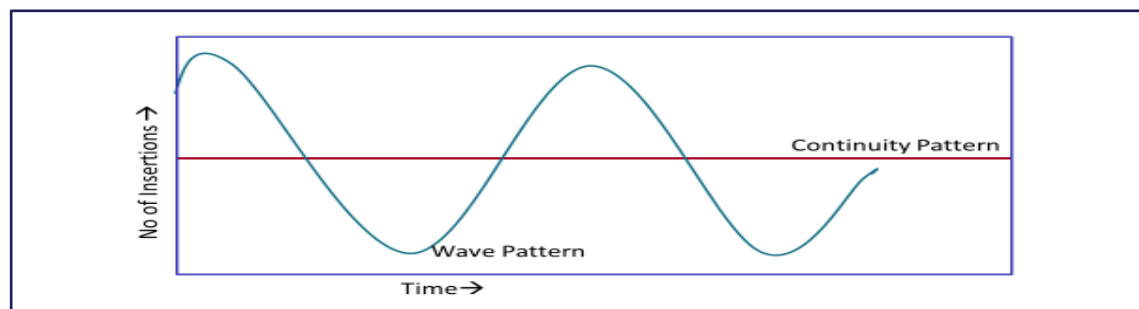


Figure 5-20: Wave Theory Model – Qualitative (Brown, *et al.* 1957, p. 122)

The debate, as evidenced by early papers in the Journal of Advertising Research (JAR), focused on the fact that all exposures were treated as equal, with little distinction between

exposure in different media, exposure to different segments of the audience, or forgetting between subsequent exposures or campaigns.

Deciding upon the flighting of the campaign remains an important aspect of the media strategy, even in today's environment where many digital campaigns run continuously using targeting techniques allows advertising to be delivered at a relevant time in response to an identified audience trigger, such as a search term or retargeting via a web visit cookie (Zufryden 1987, Reichel and Wood 1997, Sissors and Baron 2010, Summers *et al.* 2016). The debate now lies in what consumer behaviour is and what attitudes may need to be 'nudged' (Shankar and Horton 1999, Boyd *et al.* 2010, Romaniuk *et al.* 2013). Within the always-on continuum, flighting may also be considered from the aspect of copy and format rotation and creative wear-out, or adstock carry over, which can be monitored more effectively now to identify how interaction, engagement and response changes over time as the copy is used (Naik *et al.* 1998, Tellis *et al.* 2005, Bellman *et al.* 2010).

5.8: Modelling the media mix solution

With all of these considerations, there has been an extensive discourse around the topic of media modelling and attempts to find a mathematical and analytical solution that can accommodate the various criteria and options. The discourse is often focused on trying to quantify the media planning decisions behind the principles of efficiency and effectiveness and seek to simplify the complexities of the multi-criteria decision making (MCDM) problem by offering an algorithmic or 'black box' solution (Kwak *et al.* 2005, Aruldoss 2013, Goodspeed 2016, Tafreshi *et al.* 2016) and debate has been refreshed regularly to reflect the changing media options that are available and the various computational and research techniques used to support them.

5.8.1 Early modelling work

The first exposure studies were undertaken in 1938, which helped media planners consider advertising impact and audience measurement alongside cost and circulations data (Calantone and de Brentani-Todorovic 1981). Reflecting this, the earliest work offered a number of "*basic media concepts*" around reach, frequency and continuity to help maximise one or optimise both (Brown, *et al.*, (1957, p. 122). Such arithmetic models produced simple cost and exposure analysis to assist intra-media decision making and budget allocation (Cannon 1983, Danaher 1991a, Wood 1998, Cannon *et al.* 2002, Cheong *et al.* 2010). Planning concepts were supported by the wider communication and economics theories discussed previously, such as the 'law of diminishing returns', which helped direct the way in which a campaign was structured. Reflecting on these attempts at media modelling Calantone and de Brentani-Todorovic (1981) described them as being primarily implicit in nature, being subjective and based on expert judgement.

Some of the first quantitative modelling was introduced in 1961 by Young & Rubicam (Y&R) using linear programming (LP) methods. These were rapidly updated in 1963 to introduce algorithms to model consumer-market level data around purchase cycle and brand switching

rates, together with consumer-media data relating to audience duplication and advertising decay effects (Assael 2011). Building on this, a variety of different mathematical approaches were suggested between 1960 and 1980, including techniques such as re-engineered linear programming, integer programming, dynamic programming, iteration, heuristic programming and simulation modelling being proposed to provide optimising, non-optimising and maximising media-exposure solutions (Gensch 1968, 1969, 1970, Little and Lodish 1969, Zufryden 1975a, Chandon 1976, Calantone and de Brentani-Todorovic 1981, Assael 2011, Cheong and Kim 2012). These models were primarily focused on improving siloed intra-media decision making by providing “*distribution models aimed at estimating the reach and frequency of exposure*”, with limited consideration given to comprehensive media planning models (Leckenby and Ju 1990, Assael 2011)

The 1980s ushered in substantial changes. Broadening media ownership drove the development of cross-media deals, and increased use of direct marketing and sales promotion techniques fuelled demand for short term, incentive-driven activities, disturbing many of the standard evaluation procedures. (Turk and Katz 1992, p. 19). In conjunction, media modelling was identified as a source of competitive advantage, with “*individual agencies commissioning their own proprietary software to calculate reach and frequency measures*” (*ibid* p. 29) and resulted in a reduction in open debate around impact measurement, budget allocation and modelling techniques (Turk and Katz 1992, p. 29, Cheong and Kim 2012). The focus shifted to a wider variety of practical topics, particularly through the Journal of Media Planning (1986-91). These included research to help estimate target marketing rating delivery for television (Cannon 1986, Danaher 1996), to assess reach and frequency for specialist target groups (Katz 1981, Cannon 1983, Cannon and Riordan 1994, Leckenby and Kim 1994, Leckenby and Hong 1998), to explore how psychographics could help with the interpretation of target audience suitability (Cannon and Merz 1980), to measure the effects of context and environment to improve effectiveness (Cannon 1982, De Pelsmacker *et al.* 2002, Furnham and Price 2006, Ebbert 2013), how to measure media imperatives and weighted media consumption (Katz 1981, Schultz 2005) and how geodemographics might be used to help balance media imperative aspects of the plan (Cannon and Linda 1982). Noting this, Danaher (1989, 1991b, 1991a, 1992, Danaher and Rust 1994) sought to reach a more varied audience with a number of positioning papers targeting statisticians and marketing researcher. Using keywords such as beta-binomial, canonical expansion, Dirichlet-multinomial, duplication of viewing law and log-linear model, rather than media exposure or campaign effectiveness, he suggested that when abstracted into random variables, the modelling problems associated with estimating the potential audience of advertising campaigns become “*tantalizing for statisticians due to awkward inter- and intramedia correlations*” (Danaher 1992, p. 254). This stimulated a wave of highly theoretical and alternative media modelling approaches, including the application of Analytic Hierarchy Process (AHP) and Analytic Network Process (ANP), however, many of these are criticised for their lack of practical application (Saaty 1990, Dyer *et al.* 1992, Zanakis *et al.* 1998, Saaty and Vargas 2001,

Lin and Hsu 2003, Tektas and Alakavuk 2003, Coulter and Sarkis 2005, Kwak et al. 2005, Saaty and Vargas 2006).

5.8.2 Modelling in the digital environment

The late 1990s and 2000s saw the rapid fragmentation and proliferation of media channels, driven by the internet, mobile technology and a mass of digitised opportunities. This brought new approaches to tracking and a demand for better accountability from all media forms. Within the literature, the arrival of the internet led to both re-evaluation and the development of new themes. Academics tested the accepted conventions, including traditional concepts such as reach and frequency (Zufryden 1986, Pendrick and Zufryden 1991, Cannon and Riordan 1994, Leckenby and Kim 1994, Novak and Hoffman 1997, Wood 1998, Bellman et al. 2010, Cheong et al. 2010, Danaher et al. 2010, Smit and Neijens 2011), and inter-media comparison and effectiveness (Nagar 2009, Dagger 2013, Danaher and Dagger 2013). Research continued into the effects of different media combinations and how to build or utilise synergies (Naik and Raman 2003, Schultz et al. 2009b, 2009a, 2012, Schwaiger et al. 2010, Assael 2011, Chatterjee 2011, Steele et al. 2013, Taylor et al. 2013) and how to optimise the opportunity presented by simultaneous media consumption or dual screening (Pilotta et al. 2004, Pilotta and Schultz 2005, Heo and Cho 2009, Schultz et al. 2009b). Practitioners explored more siloed algorithm models to optimise each medium independently (Goldfarb and Tucker 2011, Grewal et al. 2016, Paulson et al. 2018) and tried to identify new models or metrics to measure effectiveness using the digital interaction as the outcome (Novak and Hoffman 1997, 2008, Leckenby and Hong 1998, Uncles 2005, Bruce et al. 2009, Cox et al. 2011b, Smit and Neijens 2011).

Assael (2011) identified the 1990s as pivotal in driving a shift from reach and measuring opportunities to see (OTS), to more behavioural goals and “*opportunities to act*” (p.43). He also identified how research concerned with the “*integrative effects of media combinations and synergy*” with a more integrated inter- or cross-media approach. The key difference from earlier multi-media modelling was the move from modelling budgets, exposure and incrementality to focus on the more strategy aspects of modelling advertising synergies and possible communication effects, which raised further issues around audience measurement and efficiency measures (Assael 2011, Cheong and Kim 2012). A key issue is that media-mix modelling has historically treated inputs as independent of each other. However, new media often combines exposure constructs with interactivity metrics, for instance, a TV campaign could drive traffic to search for the web site, creating not only its own impact but also a search instance and a web visit. This raises the question as to whether a digital impact should be counted as an input or whether it was an output, or both (Chang and Thorson 2004, Razorfish 2009, Sudassy 2012). Building on this, issues of comparability and simultaneous media consumption raise issues around multimedia research and the desire to develop some form of agnostic media measurement (Schultz et al. 2009a, 2009b, 2012, Fulgoni and Lipsman 2017a).

5.8.3 Modelling and agnostic media measurement

To address this, more advanced panel data, such as the UK Audience Measurement for Publishers (PAMCo) and Broadcast Audience Measurement (BARB), use algorithms to model media exposure. However, traditional panel measurement methods are unable to account fully for an audience that is fragmented across devices and time, and digital interaction data is not available for all broadcast options. Within the current offering, the Nielsen TV/Internet data fusion uses a statistical matching process to link television audience information and internet usage to report national TV viewing data and website usage in a single dataset. Their aim is to measure how consumers engage with multi-media platforms when streaming and viewing media (Nielsen 2017). Similarly, cross channel duplication of Newsbrands is now estimated by fusing of print readership and digital data, again via bespoke algorithms.

But the discussion around estimating media exposure is still complicated, particularly with respect to on- and offline channel media consumption, where cross media comparison is frustrated by the variations in how media exposure and impacts are actually defined. For example, AC Nielsen panel-based methodology for measuring television impacts is incompatible with the Alphabet definition used for a YouTube impact (Fulgoni 2014, Fulgoni and Lipsman 2017a). Specifically, digital publishers quote aggregate audience numbers whereas traditional television methods use average minute-by-minute statistics (*ibid*).

Exacerbating this is the fact that faith in random sampling and the probabilistic inferential statistics used to calculate exposure impacts are coming under increasing pressure (Bulgrin 2019). They compare poorly to new digital data sets and anonymous consumer identification achieved through cookies and tagging, which can track individual media consumption and support analytics that can drive targeting and addressable advertising via programmatic buying techniques (Paulson *et al.* 2018, Bulgrin 2019).

In addition to magnifying the differences between established panel measurement and digital metrics, the current solutions, however laudable, still fail to bring together all media., Consequently, the debate for cross-media measurement continues, as measurement within platform silos is no longer seen as sufficient (Fulgoni and Lipsman 2017a, Fulgoni *et al.* 2017, Malthouse *et al.* 2018). To help resolve this, Fulgoni and Lipsman (2017), report that theoretical guidelines have been drawn up by the Coalition for Innovative Media Measurement (CIMM) to help establish criteria for cross-platform media measurement, as shown in Figure 5-21.

- Single-source cross-media audience-measurement panels alone are too small
- Hybrid combinations with census data are needed to provide both volumetrics and demographics (or purchaser targets)
- Measurement should be as passive as possible across all media
- Advertisements and content should be measured separately
- Metrics should be aligned across platforms on the basis of common units of analysis (e.g., advertising impressions) on which other metrics {e.g., reach, frequency, and demographics) are based

Figure 5-21: Excerpt from CIMM criteria for cross-platform measurement (Fulgoni and Lipsman 2017a, p. 10)

This individual-level data is at odds with the panel-based impact measurement systems that have supported the media modelling discourse over its history. It drives a raft of new accountable metrics that track actions and reactions to individual advertising formats and placements.

Traditionally media buying reflected a ‘mass approach’ with media companies selling the ‘broad’ or ‘mass’ audience that their medium is most likely to reach, as determined by qualitative and quantitative panel-based audience research techniques (Malthouse *et al.* 2018).

Programmatic is a computational approach, based around purchasing individual impacts, with audience information being driven by a combination of data, with cookies and tags recording information such as the usage device, browsing history and website context all of which be used to make inferences about the nature of the individual (see Figure 5-23). Being data-driven, the sale and purchase of media space and time often happen in real-time, through automated auctions (*ibid*).

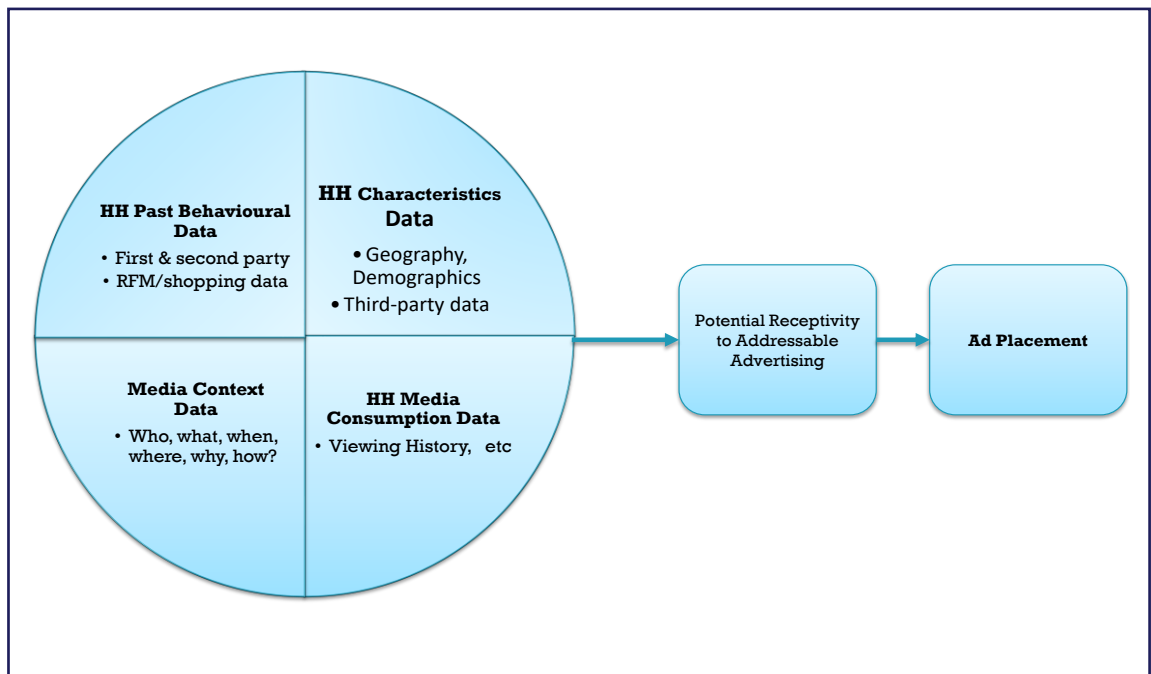


Figure 5-23: Data sources supporting programmatic systems (Malthouse *et al.* 2018, p. 774)

The computational approach draws on the techniques of direct marketing and customer relationship management (CRM) being informed by both the customer database and the data from the digital environment, often referred to as the digital ‘eco-system’ (McConnell 2015).

Ad selections are driven by algorithms that read and respond to data in real-time often using advanced machine learning techniques (Perlich *et al.* 2014, p. 104, Malthouse *et al.* 2019) and directly observes outcomes such as click-throughs and conversion to sales.

As noted by Malthouse, *et al.* (2018) media can still be delivered to a mass audience, but it is done on the basis of one individual at a time, and therefore it is a rich territory for testing which type of audience description and creative message drive the best outcomes.

The eco-system is populated by a host of services that have developed to help facilitate this, starting with the marketers and their agencies, moving through trading and exchange

systems, and including specialists in targeting, dynamic copy, data suppliers and systems to automatically tag each ad that is placed to enable live reporting, as shown in Figure 5-24. Google has the opportunity to merge location, search and email content and add web viewing data across their devices and operating systems to derive an almost complete customer view (Malthouse *et al.* 2018, 2019).

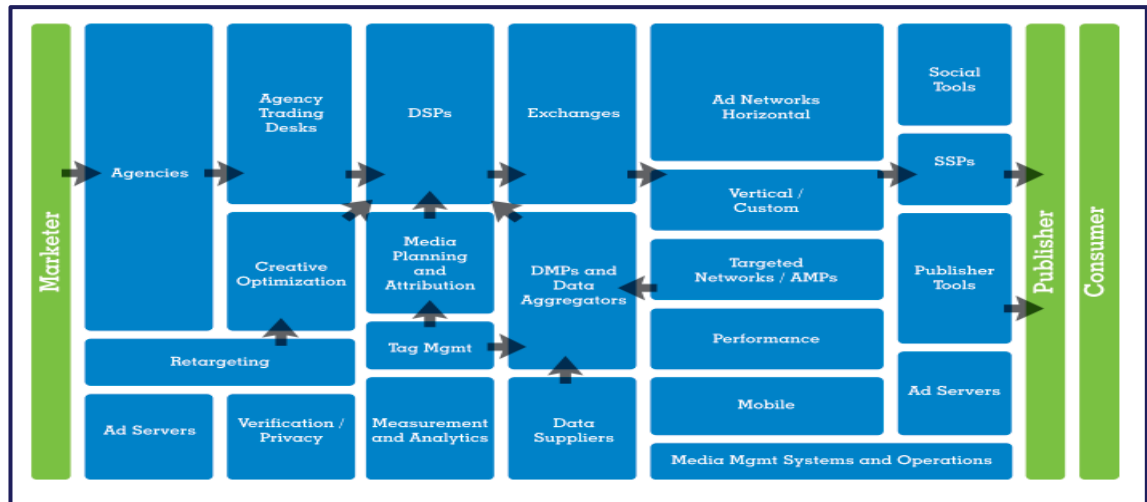


Figure 5-24: Digital Eco System (McConnell 2015)

Planners can access some of this data in relation to display advertising, including the placement of audio-visual ads across the YouTube network, but it is as yet unavailable for wider planning considerations (*ibid*).

As a result, many new media models have adopted direct marketing techniques, such as calculating the cost and volume of anticipated responses, or clicks, in relation to a task and budget. These try to link consumer activation to exposure using metrics such as ‘target number of responses/sales’, ‘cost per response/sale’ and ‘response/sale ratio to exposure’, at the expense of measuring broader brand orientated metrics (Asdemir *et al.* 2012, Regan 2014, Binet and Field 2017). Reflecting this, Cheong *et al.* (2010, p. 412) note that terms such as reach, frequency distribution and effective reach are regularly ignored within discussions around digital media planning, who prefer more focused metrics when considering the evaluation of online media (see Figure 5-25). Several reasons were offered for this including the fact that digital provides a level of accountability that reduces the need for estimation.

Top Five Factors by Usage Frequency		
1994 Offline	2008 Offline	2008 Online
<ol style="list-style-type: none"> 1. Reach 2. CPM to target market 3. Qualitative factors 4. Total schedule cost 5. Frequency distribution 	<ol style="list-style-type: none"> 1. Qualitative factors 2. Total schedule costs 3. Reach 4. CPM to target market 5. Effective reach 	<ol style="list-style-type: none"> 1. Click throughs 2. Ad impressions 3. Unique visitors 4. Page views 5. Qualitative factors
Top Five Factors by Perceived Importance		
1994 Offline	2008 Offline	2008 Online
<ol style="list-style-type: none"> 1. Reach 2. Effective reach 3. Total schedule cost 4. CPM to target market 5. Frequency distribution 	<ol style="list-style-type: none"> 1. Qualitative factors 2. Total schedule costs 3. Effective reach 4. CPM to target market 5. Reach 	<ol style="list-style-type: none"> 1. Cost per action 2. Qualitative factors 3. Ad impressions 4. Click throughs 5. Unique visitors

Figure 5-25: Top Five Media Selection Criteria 2008 vs 1994 (Cheong *et al.* 2010, p.412)

Saura *et al* (2017) echoed this and highlight further KPIs that can be added in relation to the development and measurement of digital tactics and actions, as shown in Figure 5-26.

KPIs used to calculate profitability	
ROI	A performance measure used to evaluate efficiency of investment or number of different investments. Calculated by comparing spend on DM to sales increases and incremental value
Type of Advertising Contracting Model used as KPIs	
CPM or CPT	Cost for each impression or one thousand impressions.
PPC (Pay Per Click) CPC (Cost Per Click)	Cost to be paid by advertiser when a click is made on an ad.
CPL (Cost per Lead)	Cost to advertiser of generating a lead
CPA (Cost per Action)	Cost to advertiser pays for specified actions
CTR (Click-Through Rate)	Metric that measures number of clicks advertisers receive on their ads compared to number of impressions delivered. Can also feed into PPC or CPC monitoring.
Conversion Rate	Average number of clicks from search (SERP) or Ads click, compared to impressions delivered, shown as a percentage.
Key Performance Indicators (KPIs) in DM	
Goals Conversion Rate	Relating to specific actions: e.g: make a purchase, complete a game level, register for information.
Type of Users	New Visitors: users who visit site for first time. Returning Visitors: users visiting 2+ times in set period. Helps show interest of business/website among audience.
Type of Sources	Source: origin, or source of referral to website. Medium: medium of referral: organic (unpaid search), CPC, email or direct traffic. Campaign: specific AdWords campaign/custom campaign.
Traffic on Non branded Keywords	Keywords: key words or phrases from website/Ad content indexed by search engines to aid discovery Non-branded/generic: do not contain brand name Ranking for non-branded keywords is valuable & allows website to gain new visitors unfamiliar with brand
Keyword Ranking	Rank: estimate of website's position for particular search term in SERPS. Lower the rank, the easier website is found

Figure 5-26: Summary of Key Performance Indicators (adapted from Saura, *et al*, 2017)

The rise of direct response modelling also changed the buying models that underpin the final implementation stage of the media plan. Media has traditionally been planned in terms of cost per thousand (CPT) impressions. Digital media, such as online display advertising can use this model, however, search marketing, affiliates deals and the bulk of display advertising Media purchases are negotiated around accountable metrics such as cost per action, cost per lead, cost per click or cost per sale parameters, which are perceived to deliver greater efficiency (McMellon and Eftimov 2004, Burton 2009, Asdemir *et al.* 2012, Sophocleous 2014).

The opportunity for increased accuracy may also explain why advertisers continue to shift budgets from traditional mass media to targeted online media (Heo and Cho 2009, Reynar *et al.* 2010, Fulgoni and Lipsman 2014), as corroborated in Figure 5-27 overleaf.

Some commentators question this shift, suggesting that planners are lured by the low costs and opportunities for accountability and measurement, despite the media being proven to be less effective against a range of brand engagement measures (Regan and Neill 2004, Binet and Field 2007, 2017, Edelman 2007, Sharp 2010, Meulders and Roozen 2011, Binet 2013, Romaniuk and Sharp 2015).

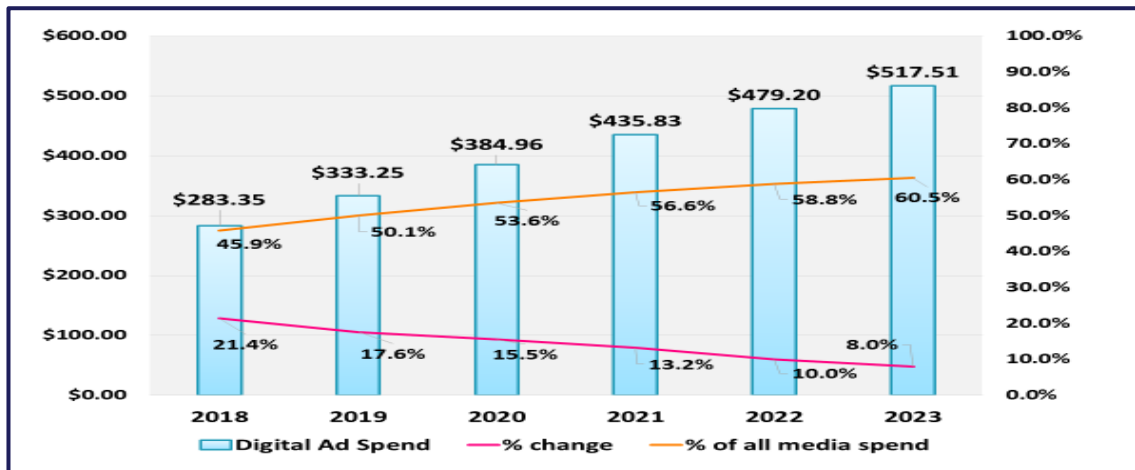


Figure 5-27: Worldwide digital ad spending (eMarketer 2019)

Binet and Field (2017) warns that there are dangers in targeting an efficiency metric such as ROMI, as it can lead marketers to cut budgets and reach only low-hanging fruit in the quest for short term growth. This is supported by a range of research looking to evaluate the importance of brand building alongside direct marketing techniques and also the consumer reaction to such personalised techniques (Binet and Field 2017, Saura *et al.* 2017, Stricker *et al.* 2017, Morhardt 2019). Others defend these choices noting that digital integration can connect media across devices, physical location and time of day, in a way that has not been seen before (Wertime and Fenwick 2008, Cox *et al.* 2011c, Mulhern 2013).

As Jenkinson (2007) summed up, the evaluation and selection of media is often polarised between attitudinal and behavioural paradigms, which view effectiveness differently, leading to a huge variety of methods for measuring data and a plethora of optimisation models and systems through which to model the media plans (Iyer *et al.* 2005, Soberman 2005, Danaher *et al.* 2010, Regan 2014, Fulgoni *et al.* 2017).

In relation to both reach and frequency, Romaniuk and Sharp (2015) believe they will remain part of the planning lexicon but with a new emphasis. For example, the reach metric might be applied specifically to ‘unique users’ or to drive coverage of a particular audience. The frequency metric might be established as an effectiveness metric, capped to ensure that audiences are not oversaturated with repeat messaging.

The digitisation of media has therefore not only changed the way media can be traded, but also brought about a multiplication of objectives and effectiveness measures which means that campaigns can take very different directions as they are implemented, which fundamentally changed the concept of media and campaign modelling.

5.8.5 Media modelling and attribution

A further area of debate is how programmatic systems build their audience data and measure audience interaction, particularly in relation to cross media attribution throughout the customer journey. The questions that arose around mix-media modelling and the fact that one medium can create a further stream of interactions, have not been answered by attribution algorithms to date.

Attribution is a key area where data modelling is being re-applied to identify possible solutions. Attribution offers the analyst an opportunity to place all of the advertising outcomes onto the 'last click' or to evaluate alternative algorithms for distributing a weighted affect across the most likely journey (Kannan *et al.* 2016, Zhao *et al.* 2019). Nisar, *et al.* (2018) note four key possibilities, including “*the last-click, time-decay, uniformly distributed, and position-based models*” (p. 399). However, because different approaches produce different results planners are generally advised to use a range of methods to get a balanced view (Ford 2018, Mahboobi *et al.* 2018, Zhao *et al.* 2019).

Overall, the advertising literature is relatively light on research and debate around possible data modelling solutions, but it is likely to accelerate as budget allocation and attribution of advertising outcomes continues to represent a problem to media planners, advertisers and marketers. The computational algorithms supporting programmatic advertising have, in the main, been developed outside of the advertising community, being driven by tech companies and computer scientists, which has created a disciplinary gap (Yang *et al.* 2017, Malthouse *et al.* 2018). As a result, many of the current solutions fail to leverage prior advertising theories and models, which in itself may explain why consumers are feeling bombarded and more conscious of the negative aspects of advertising placement than has been seen in the past.

It can be seen that media measurement and media modelling is undergoing an evolution. Academics and practitioners continue to explore siloed algorithm models designed to optimise each medium independently (Goldfarb and Tucker 2011, Grewal *et al.* 2016, Paulson *et al.* 2018, Malthouse *et al.* 2019). Alongside this, attempts to model cross-platform interaction are frustrated by the ongoing proliferation of systems and the divergence in reporting metrics. However, it also suggests that when considering the advertising and marketing effects of communication, it is not possible to craft a purely mathematical solution to the media planning problem. It is about both art and science, and as such, modelling is only part of the solution.

5.9: Discussion and Conclusions

The literature review is guided by RQ1, with the aim of exploring the major theoretical frameworks, concepts, issues and debates within the fields of advertising, media planning and strategy making that support understanding and execution of media planning in the unpredictable and changing digital environment.

Chapter 2 shows clearly that the function of the media planner has changed over time. The literature becomes more clearly divided between inter and intra media discussions in recent years, migrating from purely optimising the cost-effectiveness of media selection and media buying, to having a clear responsibility for crafting the media strategy as an identifiable step in the process. To articulate this, a number of general frameworks have been suggested to represent mixed media modelling (Barban *et al.* 1993, Barker 2007a, Katz 2016) and help navigate through the plethora of options and variables. The goal of the media strategy is to ensure the communication delivered achieves the marketing and business goals, and as such

encompasses a wide range of theoretical considerations across advertising, communications, consumer behaviour and economics. It is not just about driving efficiency in media buying but strives to create effectiveness and distinctiveness. As a result, the media planning is characterised as complex, multi-criteria decision making (MCDM).

From this analysis it is suggested that the process of formulating the media strategy has changed to be more responsive to the dynamic nature of the digital environment. Exacerbating the complexity of this decision-making process, the dynamic and turbulent media environment continues to fragment media options and change consumer behaviour. As a result, the implementation stage of media planning has become more iterative, resulting in the media strategy being less prescriptive.

Chapter 3 explored the major theoretical frameworks and debates within the field of strategy management and identifies that strategy making is rarely perfectly deductive or prescriptive. Many authors point to strategy being a statement that articulates the corporate purpose and provides key concepts that give the organisation cohesion, balance and focus to position and differentiate itself in some way from the competitor; helping to build distinctive competencies and competitive advantage, which is unique and durable (Andrews 1980, Porter 1980, 1996, Lampel *et al.* 2013). The chapter shows that strategy is highly influenced by both the institutional and individual goals and biases of the strategists and has evolved under the conditions of complexity and rapid change that are seen in today's digital world, to become more emergent, inductive and responsive to the changing environment. This move away from a highly planned, prescriptive strategy is also echoed in the language around many pureplay digital organisations, with the term 'Fail Fast' deriving from the scientific approach epitomised with the mantra of trial, testing and speed. This resonates with the changes seen in the media planning literature and leads to the conclusion that media strategy making is itself becoming more emergent, with a distinctive test and learn aspect reminiscent of the learning school of strategy making. This has been articulated in the conceptual framework (see Chapter 3, Figure 3-18, p.70).

Chapters 4 and 5 build on this and lay the foundations for answering RQ2 and RQ3. As outlined in Chapter 4, the media briefing is identified as the vital first step and the start point for any strategy making. This should articulate the business and marketing goals to enable the media strategist to craft communication and media objectives that are focused on delivering these. Research indicates that hard business-oriented objectives drive greater overall success than intermediate communications objectives. In addition, there is a wide range of background, consumer and market related information that is needed; however, it is likely that the categories of data suggested to prepare the media strategy and plan have been extended over time. After this, the communications team need to identify who to target and explore the consumer-brand/consumer-media relationships to determine the best communication route to deliver the marketing and business goals.

Chapter 5 demonstrates that media strategies need to understand many aspects of consumer behaviour, economics and how advertising communication might work to be able to model a successful campaign plan. This is shown to be a much more considered process

than just modelling the cost-effective delivery messages. Their craft is to determine how media combinations, characteristics and context can be used to enable the messages to resonate most effectively with the target group. The literature indicates the need to look at the psychology and motivations of the consumer decision making process and draw correlations with possible consumer need states to inform message strategies. This is supported by a number of hierarchy of effects models which identify possible cognitive stages throughout the consumer journey which can be addressed through different media solutions and crafted into metrics and KPIs to guide implementation. In addition, by understanding how communication may work, planners are able to consider the strengths and weaknesses of targeting the audience directly and use influencers to drive advocacy. All of this can help the planner to find ways to make advertising more relevant and help tackle the rising trend of ad avoidance which is perceived to be driven by the overt intrusiveness that has characterised much digital advertising over the last decade. When building the campaign, media planners also need to be cognisant of the budget constraints. Supporting this, the literature identifies a number of studies that have explored the correlation between the marketing share of an organisation and weights of advertising, as measured as a share of voice statistic. These offer evidence of when higher or lower weights of media impact may be appropriate, but also raise issues about how media planners can flight media across campaign periods. A further strand of debate argues whether it is more effective to dominate a single media or combine different media. Within this, despite the logic of the media dominance theory, mixed media campaigns appear to have been proven to be more effective in driving brand and product awareness – by creating synergies that help consumers to recall advertising messages more easily.

These debates, linking media usage to communication outcomes, are valuable to media strategists as they try to navigate an increasingly fragmented media marketplace where consumers are known to be consuming multiple media devices, often simultaneously. At a practical level, these theories and models underpin many of the heuristics that guide and shape the media strategies that are developed. In terms of the research questions for this study, this chapter shows that media strategists need to consider the consumer-media-brand interface and understand how communication may work to influence the consumer decision making process. In so doing, it clarifies research insight around some common heuristics that are used to guide and shape the media strategy

This chapter also explores the decades of media modelling literature. Research around intra-media scheduling continues to be explored, particularly around optimisation and measuring effectiveness via detailed computational models. These have been shown to use a variety of mathematical and algorithmic approaches designed to optimise individual channel and vehicle activity, using an increasing wealth of consumer and media data. The focus on measurement and optimisation has led to the wide use of KPIs and the tracking of actionable metrics. This in turn has changed many media buying procedures, particularly within digital media, and is further facilitated by the growth of programmatic trading. Wider research

continues to look at the overall longer-term implications of such strategies and questions what the impact of 'activation' focused activity will have on future brands.

In particular, the literature notes a disciplinary gap emerging between advertising and communication theory and how it is applied to the computational modelling that underpins much of the implementational aspects of planning and buying. In addition, as planners and analysts try to amalgamate the plethora of unrelated data sets the call for some form of acceptable agnostic media measurement has been reignited. As the media options continue to fragment, this seems, even in theory, to be highly complex.

Ultimately, the literature shows that the media strategist has had the guidance of a wealth of literature from across a number of disciplines, including advertising, communications, consumer behaviour, strategic management and now information science. However, the dynamics of the digital environment show clearly that there is a need for change to many of the models and frameworks in use.

The next chapter reviews the methodologies utilised to test these ideas and explore further how senior media strategists in the UK actually approach media strategy making and how their lived experience compares with the literature that has been explored here.

Chapter 6: Methodology

6.1: Introduction

The concept under consideration for this research is the approach to strategy making within the context of advertising media planning in the digital environment. Specifically, this research seeks to understand whether changes in the advertising media planning environment have driven focused tactical innovations in planning methods or whether there is a more profound change in the way media strategy making is being approached.

The core objectives are:

- To explore the strategic practices, models and processes being used to guide the media strategy formation and the media planning process
- To identify if new approaches are emerging around strategy formation within marketing and advertising media planning
- To develop a media planning framework to guide strategy formation in the current complex environment

6.1.1 Insight from the literature

To guide the literature review, a broad research question was posed...

RQ1: “What are the major theoretical frameworks, concepts, issues and debates within the fields of advertising, media planning and strategy making that support understanding and execution of media planning in the unpredictable and changing digital environment?”

The conceptual framework shown in Figure 6-1 evolved from the literature on media planning and strategic management explored in Chapters 2 and 3, which suggests that in a dynamic and turbulent environment, such as that created by the internet and digitisation, strategy making should take on a more emergent approach, with the flexibility for strategists to learn and iterate their activity to take advantage of changes as they arise.

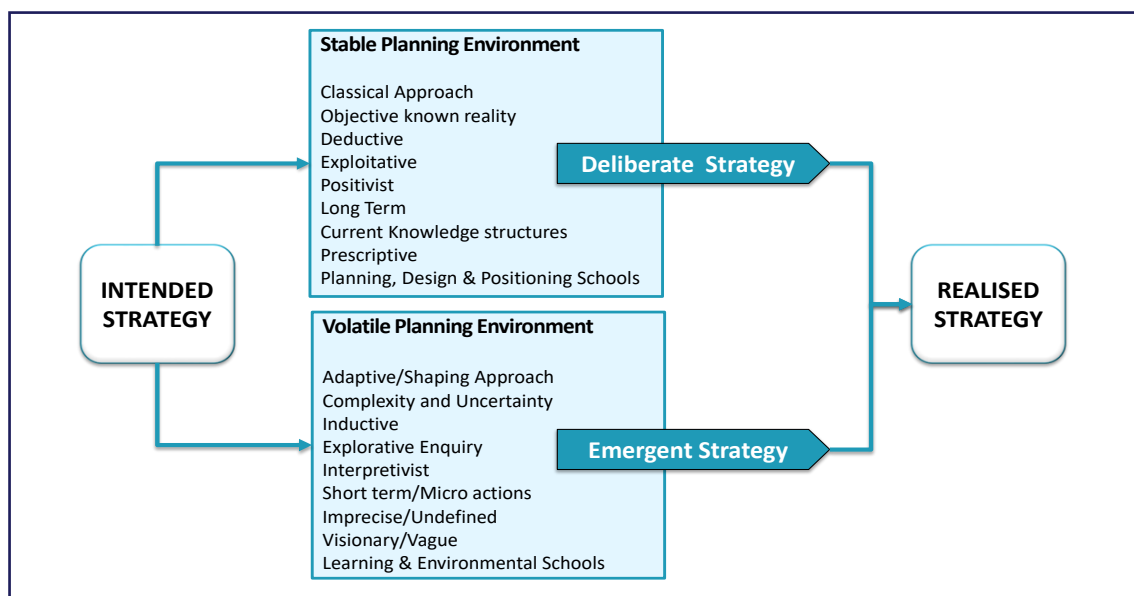


Figure 6-1: Conceptual framework - media planning in different environments

When juxtaposed against the specific media process frameworks presented in Chapter 2 the framework posits that new processes should have developed amongst practitioners to accommodate the dynamic nature of the digital environment.

Further the research indicates that the media strategy and plan should be informed by the business and marketing goals, and that the route to achieving the necessary information exchange is through an extensive client/agency briefing. However, as discussed in Chapter 4, the research shows that this is often sub-optimal. Chapter 5 goes on to show that media strategists need a huge range of information. This extends from understanding the marketing goals, the consumer behaviour and the message strategy through to their own in-depth knowledge of the media options available. It can be hypothesised therefore that the categories and sub-categories of briefing elements as suggested by Cowen & Abratt (1999) will be unrepresentative of the information needs of today's media planners.

6.1.2 Research questions for primary research

To explore this further and help to select the most appropriate research methodology for the different aspects of this study, the following sub-questions are asked:

- RQ2: What are the narratives around how media planners currently approach media strategy and planning?
- RQ3: What types of data do media planners currently use to formulate the media strategy and plan?

This chapter details the methodology developed to extend this research and explore the media strategy making approaches being employed by UK media planning practitioners.

6.2: Research Design

In designing the research needed, it was necessary to consider what methodological approach would be the most appropriate for the study.

As a social-science research project it is focused on people in a social setting and aims to gain an understanding of their human situation. Both the researcher and the researched will bring their own interpretations of reality to bear, however, as Robson (2011) suggests, social science research should be underpinned by a scientific attitude, with the research carried out systematically, sceptically and ethically (p. 15) to ensure that the researchers own opinions and values do not influence the findings. The approach must be guided by the research questions to ensure a clear purpose to finding things out “*and increasing knowledge*” (Saunders *et al.* 2015, p. 4).

As outlined above, these establish the need to find out how media planners formulate the media strategy, to understand why they take the approaches they do, and identify what information they use throughout the process, all of which points to an exploratory and descriptive approach, as confirmed in Figure 6-2 overleaf. The goal of exploratory research is to explore specific aspects of the research area and “*provide insights and understanding*”, with the emphasis on understanding why and how (Malhotra *et al.* 2012, p. 70). It does not aim to provide final and conclusive answers. As such, exploratory design is generally

unstructured and offers the flexibility to allow concepts to be unearthed from the respondent's perspective holistically, through inductive exploration of the data to identify recurring themes, patterns, or concepts (Robson 2011, Nassaji 2015).

- Pure, applied and strategic research
- Descriptive, explanatory and evaluation research
- Exploratory, finding out why and how
- Conclusive, causal, testing out and problem-solving research
- Covert, adversarial and collaborative research
- Basic, applied, instrumental, participatory and action research

Figure 6-2: Types of Research (Blaxter et al. 2010, p. 7)

Descriptive research aims to describe a phenomenon and its characteristics, looking at what, rather than why or how. Qualitative research is itself sometimes called descriptive research, as both involves naturalistic data, but they can differ in the ways they are evaluated. Descriptive research may be collected qualitatively, but the content is often evaluated using frequencies or other statistical methods to determine relationships (Nassaji 2015). However, before confirming the final data collection methods, it is important to explore and establish the philosophic underpinning of the research approach, including the Epistemology, Ontology and Axiology as identified by Saunders *et al* (2015)

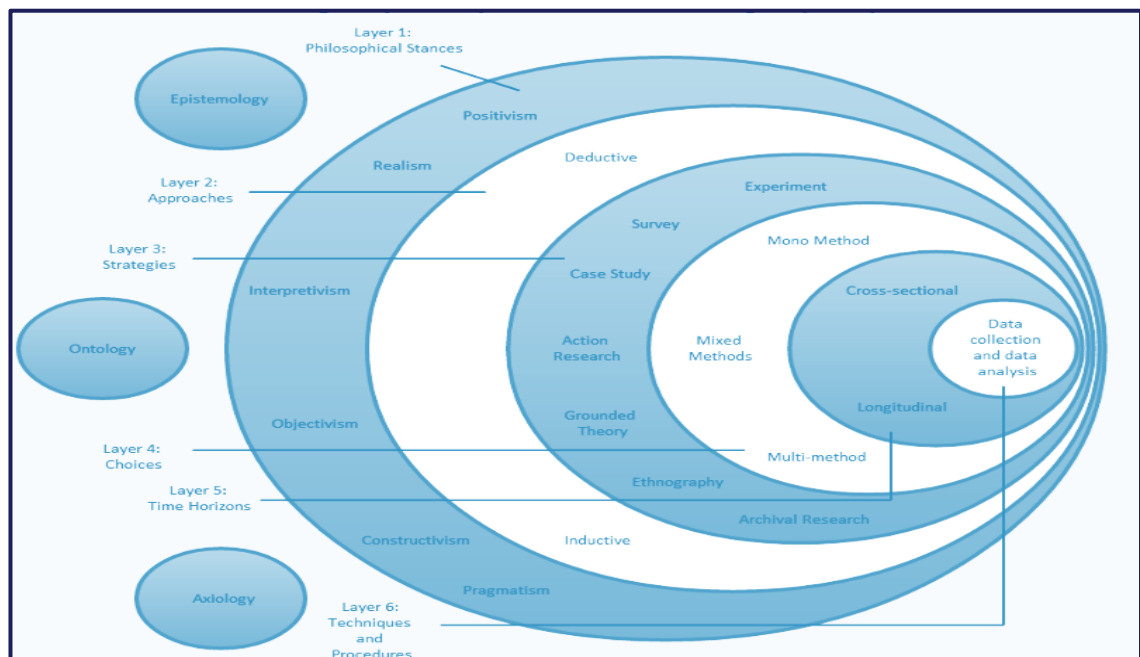


Figure 6-3: Research Onion Diagram based upon Saunders *et al*, 2012 as adapted by the University of Derby, 2012

The Ontological philosophy is concerned with the nature of reality and was not just an academic question to be asked at the commencement of this project but was a recurring theme as I delved into the literature. The very premise of how or why strategy making may be changing lies in the ontological approach. From a research standpoint, I am reminded throughout the literature that the researcher is supposed to be an objective bystander, there

to chronicle, evaluate and conclude. But as noted by both Robson (2011) and Blaxter *et al* (2010, p. 15), research is “*not a wholly objective activity carried out by detached scientist*”, it is a social activity...

“powerfully affected by a researchers own motivations and values, [and] takes place within a broader social context within which politics and power relations influence” (ibid 2010, p. 15)

Reflecting this divergence in opinion between objectivity and subjectivity, three philosophical positions are commonly described: objectivism, constructivism and pragmatism. Based on this, I suggest that this study embodies a constructivist view. The social activities of media planning or strategy making are themselves constructed through the interactions between people. Any meaning attributed to them is constructed by human beings as they interact, interpret and make sense of the world – and we do not interpret things in the same way, as articulated humorously in the difference between cats and dogs in Figure 6-4. This contrasts with something such as gravity which can be scientifically proven to exist in the same way, whether I am sitting under an apple tree in Bournemouth or London.

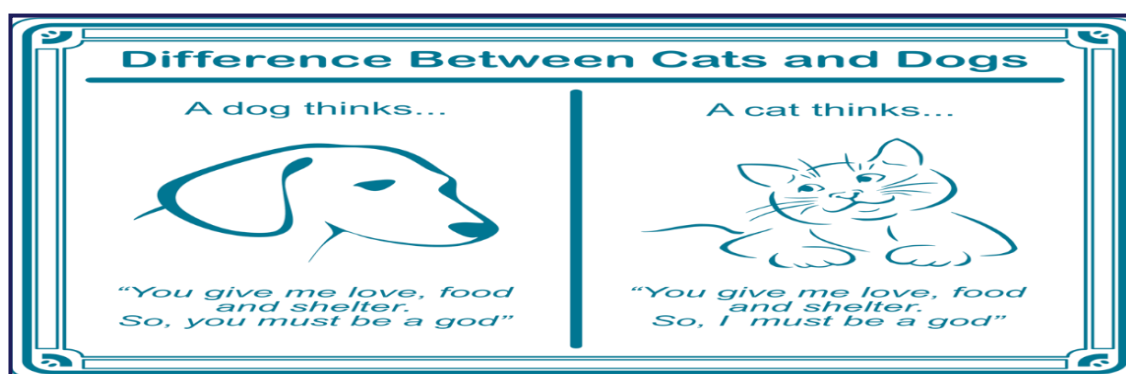


Figure 6-4: The Difference between Cats and Dogs (Source: GDJ from Pixabay)

In the study, meaning is being constructed through my evaluation of the data. In addition, my participants will be constructing their own view of reality and how they interpret their world will impact upon their answers.

In terms of Epistemology, again it was important to reflect on the situational aspects of this study. The plan is to ask senior advertising industry practitioners how they approach their strategy making and compare and contrast this data with the approaches described and recommended through the literature. The participants version of reality will impact on how they interpret the questions and how I collate and theme the data will be an interpretation of their interpretation. From this perspective, it would be appropriate to say that the research, and I, as the researcher, are following an interpretivist approach.

Finally, when looking at Axiology it was important for me to recognise and understand the role that my own values and opinions would have on the research. Reflecting on this, I considered my motivations for undertaking this research. I would describe myself as a researcher who is committed to the field of media planning, following a 25-year career within UK advertising agencies. I want to find out if there is something new and exciting happening amongst practitioners which can contribute to the wider field of theories around strategy making, which will inform my own professional practice and enhance my ability to teach

students about the roles and opportunities within the industry. I, therefore, have positive opinions about the industry. I identify with the profession and recognise that I must still exercise my best level of scepticism, as per Robson (2011) to ensure that I do not misinterpret the information or possible insights that my respondents offer, to fit any preconceived ideas.

Many research texts offer discussions around these philosophical debates and in particular the historic linkage between the quantitative and qualitative paradigm. It is clear to see why a positivist philosophy could accompany research in natural science, where the facts are supposed to speak for themselves and be value-free. In such circumstances, where quantitative methods prevail, hypotheses are tested and facts found which might result in causal laws, such as gravity. However, within social sciences and social research, the positivist view comes in for a lot of criticism. Just because something is collected numerically does not make it fact, because it was collected from people who have opinions, attitudes and perceptions (Blaxter *et al.* 2010). Post-positive views try to accommodate the imperfection and fallibility of non-objective evidence, drawing upon the need for reliability and validity to overcome the potential bias, and acknowledge the socio-political factors that might influence the way knowledge is shaped and accepted. However, it is still difficult to see how many social science projects can truly reflect post-positivism, and certainly, I believed that my own research would not. Even from the point of the sampling perspective, it would not be possible to undertake a truly randomized procedure to select the respondents as most of those in the roles were unknown to me and not available through some form of list. In addition, as described earlier, I see myself as a committed researcher in this area, one with knowledge and opinions, therefore not explicitly objective. As Robson (2011, p. 23) states “*practitioner-researchers may find the role they are expected to play in research based on post-positivist principles uncongenial*”. In summary, the philosophical underpinning for my qualitative research was social constructionism and interpretivism, looking to collect data that might suggest a new strategy-making process, and would be an inductive, theory-building approach (Saunders *et al.* 2012).

6.3: Research methods

Based upon the objectives and the nature of the research questions outlined above, the study was undertaken via exploratory research, encompassing a review of the literature and secondary data sources, with primary data collection via a survey and in-depth interviews.

6.3.1 Secondary data sources

The research was supported by documentary analysis of secondary research sources which shed light on the advertising industry and the issues and current debates that exist. These included:

- Trade journals and magazines, such as Admap, Campaign and Marketing Week, to gain insight into the current issues of debate in the industry,

- Industry research reports, such as those produced by the IPA and DMA outlining recommendations for industry best practice, including the IPA study by Field and Binet into brand activation.
- Reports from trade organisations, including WARC, Thinkbox, etc., outlining industry research and opinion.

The trade press and secondary data supported the literature, noting the rise in use of digital tools and technologies within advertising campaigns, that media planning was changing, and that historic systems, methods and models were potentially inappropriate. In addition, they play a role in triangulating or substantiating some of the assertions identified through the literature.

6.3.2 Primary research

Given the exploratory nature of the study, the primary research methods selected were qualitative in nature, to explore how media planners are approaching the media strategy making process. To support this, two distinct studies were undertaken, as outlined below. The first study was designed to answer RQ2 and explore how media planners approach the formulation of the media strategy, whereas the second study was the vehicle to explore RQ3 and identify what data media planners use in the formulation of the media strategy.

Study 1 utilised a series of in-depth interviews amongst senior industry media strategists and planners, to explore and capture their own narrative around how they approach media strategy and planning. In-depth interviews were the appropriate method to encourage participants to discuss and describe their work and how they approach it. Seniority ensured that participants would be able to shed light on the approaches and processes undertaken from the perspective of personal experience rather than through observation of how others might approach it. Alternatives, such as focus groups, were rejected as the target participants are both busy people and in competition with one another, therefore focus groups were impractical in terms of both time co-ordination and openness. Equally, more ethnographic routes were rejected as observation would not have explored the thinking that was being undertaken and pre-piloting discussions with senior practitioners indicated that they would not be able to allow someone who was not under contract to listen to actual client discussions. In-depth interviews offered the opportunity to gather participants ideas, observations and thoughts around the media planning process. The interviews were transcribed and analysed via Nvivo to identify themes within the data that contributed to answering the research questions.

Study 2 comprised of a survey amongst marketers and media planners to identify the types of data that media planners use to formulate the media strategy and plan. The literature clearly indicates that media strategy and planning entail multi-criteria decision making and that a wealth of data needs to be assessed to achieve the optimal solution. Over the course of the research period, 93 responses were gathered, the content of which was evaluated through Nvivo and SPSS to drive the best interpretations and allow a detailed description of the types of data derived from the media briefing and used within the media planning process.

Topic	Quantitative research	Qualitative research
Research enquiry	Exploratory, descriptive, conclusive and explanatory	Exploratory, descriptive and explanatory
Nature of questions and responses	Who, what, when, where, why, how many Relatively superficial and rational responses Measurement, testing and validation	What, when, where, why, how Below the surface and emotional responses Exploration, understanding and idea generation
Sampling approach	Probability and non-probability methods	Non-probability methods (purposive)
Sample size	Relatively large	Relatively small
Data collection	Not very flexible Interviews and observation Standardised Structured More closed questions	Flexible Interviews and observations Less standardised Less structured More open-ended and nondirective
Time Horizon	Longitudinal or Cross Sectional	Longitudinal or Cross Sectional
Data	Numbers, percentages, means Less detail Or depth Nomothetic Description Context Poor High reliability, low validity Statistical inference possible	Words, pictures, diagrams Detailed and in-depth Ideographic description Context rich High validity, low reliability Statistical inference is not possible
Cost	Relatively low cost per Respondent Relatively high project cost	Relatively high cost per respondent Low project cost

Figure 6-5: Comparison of Quantitative and Qualitative research (adapted from McGivern, 2006; Saunders et al., 2015)

Echoing the summaries offered in many of the research methods texts around the differences and benefits of quantitative and qualitative research (Figure 6-5), the studies were undertaken in a flexible way that allowed for the development of understanding as the research process proceeded. The sampling strategy required access to participants with practical and professional experience in the role of media strategy and planning. Probability sampling was rejected for this project as it was not possible to gain details of every individual in the population of interest, therefore they could not possibly have an equal chance of being selected. With the lack of a sampling frame for the population in question, the non-probability sampling approach was used. However, there are a number of different sampling techniques that can be used to support non-probability sampling, as suggested in Figure 6-6.

<p>Probability sampling</p> <ul style="list-style-type: none"> • Simple random sampling: selection at random • Systematic sampling: selecting every nth case • Stratified sampling: sampling within groups of the population • Cluster sampling: surveying who clusters of the population sampled at random • Stage sampling: sampling clusters sampled at random
<p>Non-probability sampling</p> <ul style="list-style-type: none"> • Convenience sampling: sampling those most convenient • Voluntary sampling: the sample is self-selected • Quota sampling: convenience sampling within groups of the population • Purposive sampling: handpicking supposedly typical or interesting cases • Dimensional sampling: multi-dimensional quota sampling • Snowball sampling: building up a sample through informants
<p>Other kinds of sampling</p> <ul style="list-style-type: none"> • Event sampling: using routine or special events as the basis for sampling • Time sampling: recognizing that different parts of the day, week or year may be significant

Figure 6-6: Sampling strategies (adapted from McGivern 2006, Blaxter et al. 2010, Robson 2011, Saunders et al. 2015)

Due to the different data requirements, although both Study 1 and Study 2 used non-probability strategies, they employed different sampling techniques, as detailed below in sections 6.4 and 6.5.

In terms of time horizon, the research was undertaken between 2014 and 2019. Although the process was protracted, the approach overall was cross-sectional in nature and sought to identify the phenomenon at the time of the study (Saunders *et al.* 2012).

Overall, the combination of the two studies helped to shed light on the overarching research objective to explore the strategic practices, models and processes being used to guide the media strategy formation and the media planning process.

6.4: Study 1: In-Depth Interviews

Study 1 was designed to answer RQ2: What are the narratives around how media planners currently approach media strategy and planning?

As identified above, an exploratory, qualitative approach was appropriate for this employing in-depth interviews to capture participants own narrative around how they approach media strategy and planning.

A purposive non-probability sampling technique was used, with the participant pool drawn from a wide base of senior UK marketing communications planning and media planning practitioners. As noted in Chapter 1, titles can vary within the industry, therefore inclusion criteria were drawn up to ensure participants had a high level of experience, responsibility and knowledge of the phenomena. These included:

- Senior marketing and advertising managers and directors who have responsibility for briefing, designing, approving, implementing and reporting on advertising media campaign plans.
- Founders & principals, such as managing directors, who undertake media planning within specialist digital & social media agencies
- Senior advertising agency communication planners amongst UK's agency groups
- Senior marketing managers and directors within UK organisations with responsibility for advertising and promotions.

During the course of the research 40 individuals were identified and approached as being representative of typical senior communication planners responsible for media strategy and planning. Participants were drawn from both the UK offices of large global corporate agencies and smaller UK independents to encompass a range of organisational settings. In terms of regionality, London and the South of England were selected. This was a pragmatic scoping of the research, in that London is the central hub for many of the global network advertising agencies and therefore a good place to find the respondents. The South of England was chosen for convenience to the researcher but is known to be home to many high-quality independent advertising agencies

As indicated by Saunders, *et al* (2012), the sample needs to be selected to ensure that it generates adequate and relevant information with sufficient quality of data to offer new insights into the topic. It was also important to ensure that the required people were available

and accessible within the period set aside to complete the project. Some of the initial candidates were unavailable, but nominated an alternative respondent, therefore bringing in a degree of snowball, or chain referral sampling to the project (*ibid*, pg. 215).

6.4.1 Access to participants

Without access to senior media practitioners, the research would have floundered. To consider this properly I established a number of questions to guide constructive reflection, as shown in Figure 6-7, because the progress of my project, the way I envisaged it unfolding and my ability to collect the kind of data I wanted, was dependent on their cooperation.

Who do I want to research?	Senior media planners involved in determining/creating the media strategy that guides media advertising communication campaigns
Who do I need to get permission from?	The university ethics committee – definitely. The individuals through a process of consent - definitely. Their organisations – probably not as I wanted the respondent’s own interpretation and lived experience. However, the world of advertising is very competitive and it is possible that people’s approach is aided or constrained by organisational processes and proprietary systems. Therefore, the participant information and consent form needed to consider this aspect, outline the problem and possible solutions, to ensure that this was not stumbling block
How much time commitment is required and is it reasonable?	In the trial/pilot interviews, it was estimated that 45 minutes would be enough, although early interviews often ran to an hour. As a consequence, the interview invitation, participant information form and consent form were adjusted to reflect this. This seemed a reasonable length of time as people were happy to talk about what they were doing and seemed to enjoy the questions
Are there any possible problems?	The biggest problem identified was gaining of the appointments. Everyone was happy to be interviewed, but appointment slots were difficult to commit to in their busy diaries. Sometimes date availability became quite protracted. To accommodate this, I tried to be as flexible as possible in my own time commitments.

Figure 6-7: Questions of access adapted from Blaxter *et al.*, 2010, p. 156–159

In short, the answer was yes. I was confident that I would gain access, not just to those I had worked with, but also to the new agency leaders that have risen through the industry in the last 10 years. This is because I have a history within the industry and know who to approach, but also because I see these individuals as my peers, rather than superiors. However, I needed to determine the feasibility of the project, therefore, as part of the initial planning, I approached a number of key individuals in the top global media independents, such as Carat, Havas and MGM, to ask if they would be open to such an interview. Blaxter, *et al*, (2010) describe this as pre-piloting, a stage that does not gather data but clarifies the feasibility of the project.

6.4.2 Ethical consideration

All social research gives rise to a range of ethical issues around privacy, informed consent, anonymity, truthfulness and reliability of the study (Blaxter, *et al*, 2010). These issues were considered throughout the process and care was exercised in the collection, processing,

analysis and the write-up, to always be clear about the nature of the agreement entered into with the research participants through the participant information form and gaining of informed consent.

The ethical clearance process was a constructive focal point for ensuring that all such aspects were given consideration and in particular drew attention to the need to consider if the interviews would give rise to any psychological intrusion, as noted through the submissions to the University Research Ethics Committee (see Appendix 12-6 p. 231 and 12-7 p.233). In assessing this it was important to stand back and consider what effect the actions might have on my interviewees or the final reader of the thesis. Following discussion with supervisors and reviewing the guidance provided by BERA (2011) it was clear that the topic area was not as contentious a subject area as many other social sciences research projects might be, especially those in the field of health and social care. Therefore, it was not anticipated that the interviews would pose any threat that could be considered a psychological intrusion, but the possibility had to be considered and processes put in place to mitigate any such possibility. The designated participants are high-level career professionals who regularly present their agency's credentials and approach to planning when working on new business pitches. They also present planning methodologies and solutions to clients on a regular basis. The information being sought was something about which the respondents were highly knowledgeable and which they describe and discuss regularly. However, it was important to remind respondents that they did not have to answer any questions that they thought might compromise their personal, professional or company position.

Ethical clearance was originally gained 15th November 2013 from London South Bank University Research Ethics Committee. However, due to change in the research centre in 2014 and interruption to the PhD due to illness, ethical clearance was reassessed in 2015 and re-approved on 29th September by the Bournemouth University Research Ethics Committee.

6.4.3 Consent procedure

Participants for Study 1 were recruited via a process of personal invitation and informed consent, with the right to withdraw at any point due to any reason and without any requirement to disclose that reason (see Appendix 12-8 - Interview Request Letter, p. 235). The letter of invitation was accompanied by the Consent Form (CF) (see Appendix 12-9 - Consent Form, p. 236) and the Participant Information Sheet (PI) (see Appendix 12-10 - Participant Information Sheet, p. 237). The PI was designed to address a range of possible questions, particularly around issues such as anonymity, payments, time considerations, privacy and confidentiality. In addition, an interview guide was included to outline for interviewees the types of questions that would be asked (see Appendix 12-11, p. 240).

Informed consent (IC) was attained at the beginning of the interview through the discussion and agreement of the consent form, although all interviewees had been sent a copy of the PI and CF in advance with the initial interview request and again with the confirmation of the interview appointment. Recording of the interviews was outlined in the Participant

Information (PI) sheet and discussed at the beginning of each interview prior to the consent being signed. The consent form made it clear that the anonymity of individual participants would not be waived for the interview, the storage, analysis or write up of findings. To preserve this privacy, procedures were put in place to render the materials anonymous, both in its storage, and its use within the thesis. In addition, respondents were advised not to reveal information that their employer would consider proprietary but also that should they wish to discuss some proprietary tools for which details are available in the public domain, the public domain information would be cited without linking it back to the respondent's interview comments. By doing this everyone who completed the interview was entirely comfortable with the process.

6.4.4 Sampling strategy

As noted previously in Figure 6-7, the sample size will differ dependent upon the research strategies being used to answer the research question and is dependent upon the nature of the population from which the sample is selected. For Study 1 the sample was relatively small and based around qualitative in-depth interviews. Because of the highly focused nature of the sampling pool, an initial sample size of 20 participants was targeted (Symon & Cassell, 2012, p. 45) designed to acquire a breadth of views across UK full-service agencies, media independents, digital specialists and in-house media departments. Essentially, the sample was flexible and continuous. The guiding principle was saturation, with a view that it should continue until no overtly new information was being identified (Robson 2011). Over the course of the research period, 40 invitation letters (with accompanying PI & CF) were sent out, finally resulting in fifteen in-depth semi-structured expert interviews, twelve of which were conducted amongst senior professionals with a responsibility for media strategy and planning, plus a further three were amongst senior professionals on the media owner side as outlined in Table 6-1.

Code	Role/Title (Gender)	Organisation Type	Location
MD1	Managing Director (M)	Global network media independent	London
MD2	Managing Director (M)	Full-service independent	South Coast
MD3	Managing Director (M)	Independent data agency (later acquired by the major network)	London
MD4	Managing Director (F)	Independent direct & digital marketing agency	South Coast
PD1	Planning Director (F)	Global network media agency	London
PD2	Planning Director (M)	Specialist financial services agency media department	London
PD3	Chief Strategy Officer (F)	International agency planning department	London
PD4	Communication Strategist (F)	International digital agency media department	London
PD5	Group Planning Director (M)	Global network media independent	London
PD6	Global Marketing Manager (F)	International pharmaceuticals in-house	London
PD7	Planning Manager (F)	Independent data agency	London
PD8	Head of Planning (M)	Global network media independent	London
SD1	Client Services Director (M)	Media Owner	London
SD2	Business Development (F)	Media Owner	London
SD3	Sales Director (M)	Media Owner	London

Table 6-1: Participant profile and coding

The sample included a range of roles and titles, across a range of agency types. Four of the interviewees held the title of Managing Director [coded MD1-4] and a further eight interviewees held titles such as Planning Director, Chief Strategy Officer, Group Planning Director, Head of Digital Planning and Planning Manager [coded PD1-8]. Of these twelve agency participants, seven represented global or international organisations and five independent UK businesses. In addition, the three media owner’s representatives included a Client Services Direct, Business Development Manager and Sales Director (coded SD1-3) and were interviewed to help triangulate some of the details discussed as they were responsible for advising clients and agency teams on strategic planning issues in relation to their field of expertise.

Interviews were predominantly held in the participants' office, whether in London or the South Coast, with one being undertaken within the university offices, and one held over Skype. In all cases every effort was made to make participants feel relaxed and comfortable in the physical environment (McGivern 2006).

Role	No		Role	No
Agency: Managing Director	4		Agency: London Global	7
Agency: Chief Strategy Officer/Communication Strategist	2		Agency: London Independent	3
Agency: Planning Director	4		Agency: South Coast Independent	2
Agency: Planning Manager	2		Male	8
Sales/Business/Client Services Director	3		Female	7

Table 6-2: Summary of participant profiles features

6.4.5 Data collection

The primary data was collected via semi-structured in-depth interviews. The method involved questioning and discussing the participants approach to and setting of the media strategy with the intention to build an understanding of ‘typical cases’ that were indicative of the participants behaviour and also understand why they used the approaches they described. Guided by the research question, an interview guide [see Appendix 12-11, p. 240] was used to help design the flow of the discussion and ensure that similar topics were covered in each interview. The interview structure was designed in line with guidance offered through the literature, with a clear introductory section at the beginning to go through the required ethical aspects and ensure the participant is comfortable. At the outset, I believed that my experience within the field of media planning would enable parity and trust to be established smoothly and quickly with the respondents. As detailed by Keegan (2009, p. 78) in-depth interviews are intensive and there is a need for the researcher to demonstrate experience and sensitivity in order to quickly establish a rapport with the participant...

“to delve beneath cultural norms and surface attitudes and explore the rich, personal seams beneath [...] achieved as a shared exploration between the researcher and the participant, and [requiring a degree of trust and parity between the two individuals”

The main body of the interview “funnelled” participants towards more specific questions and topics (McGivern 2006, p. 197). The first section focused on confirming the roles and responsibilities with relatively straightforward general questions. The second stage was a general discussion using broad, open-ended questions around their approach to, and thinking around, strategy making in order to understand the environment they worked in and the challenges they face. This was followed by a more focused and probing discussion around elements of the process, the drivers of their strategy and the measures and metrics that might guide it, including the use of computer modelling and optimisation. The final section sought to tap into more unconscious aspects using projective techniques to help participants conceptualise the approach being described and compare or contrast it with processes being described in the media planning related literature. This was supported by a number of artefacts being used to initiate consideration of the current frameworks and how representative they might be of the current practice (see Figure 6-8).

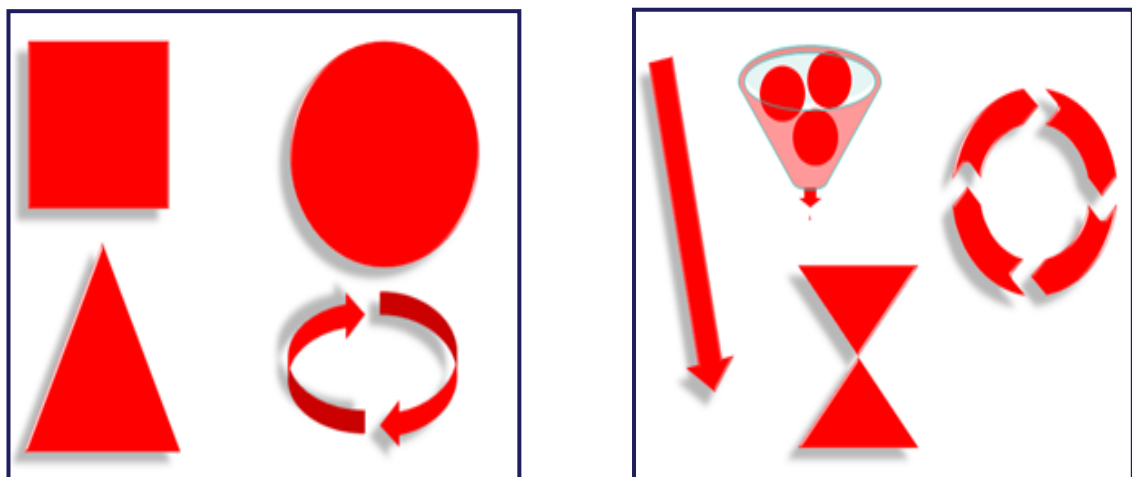


Figure 6-8: Outline artefacts used to consider the media planning process

The final wind down was used to signal the end of the session and to summarise some of the main points and asking the participant if there was anything they wished to add.

6.4.6 Pilot study

The interview was piloted with a former agency colleague. During this stage, a number of elements were reviewed, including the consent form which was updated to ensure it was clearer where signatures and initials were required. In respect to the main interview guide, the introductory commentary was elaborated upon to provide greater scripting so that I could describe the research more clearly and succinctly, to prevent rambling.

The second change was to reduce the emphasis on the phrase media strategy, which we identified as priming the participants and became a catchall expression that detracted from considering the underlying stages of the process. Given the ongoing and iterative nature of qualitative research the interview guide was updated a number of times over the research period to reduce duplication of some of the topics and add additional themes that had been raised by participants.

6.4.7 Main data collection

The interviews were conducted face to face, with the exception of one that was facilitated via Skype, an online conferencing software programme, because the participant had to travel abroad at the last minute. The advantage of selecting face to face interviews was that the conversation flowed naturally and there was the opportunity to enquire and confirm issues if respondents used jargon or unfamiliar terms. The disadvantage was that they were more time consuming and more costly than telephone or email interviews would have been. However, telephone interviews were not seen as optimal for this study, firstly due to the extended length of time anticipated for the interview, and secondly because of the inability to share the artifacts in a meaningful way. Emails would have been both time and cost-efficient as there are “no interviewer costs”, but again they are known to limit the potential flow of information and the level of detail that can be gathered (McGivern 2006, Robson 2011). In addition, from a perspective of confidentiality, safety and professionalism, personal or home locations were not considered appropriate.

The interviews were audio recorded to facilitate transcription and analysis, although notes were also taken during the interview to aid discussion and flow.

Each interview lasted around 50 minutes and as the number of interviews progressed, the responses became increasingly similar, indicating a degree of homogeneity within the context they all find themselves in and validating the sample size.

6.4.8 Data analysis

Qualitative data analysis can be undertaken in a number of ways including either thematic analysis or content analysis. Guided by the ‘why’ and ‘how’ orientation of the research question and the type of data collected, thematic analysis was employed to analyse the data for Study 1, using several rounds to identify patterns and relationships within the data. The aim was to identify themes that captures the salient aspects of the data to try to answer the research question in a meaningful way (Scharp and Sanders 2019). Braun and Clarke note that this is an iterative process and recommend six key steps, as shown in Figure 6-9.

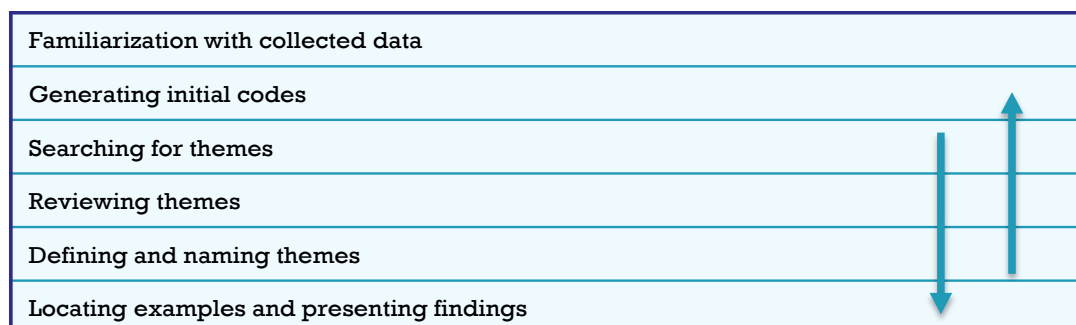


Figure 6-9: Six-phase thematic analysis (Braun & Clarke, 2006, p. 87)

The initial stage was to transcribe the interviews and load the transcription and audio files into Nvivo. This is a useful way to become more familiar with the data and to start thinking about how to organise it. This was done with the aid of an initial coding manual constructed around

the concepts and topics discussed throughout the interview. As the only researcher and coder on the project, this coding manual was incredibly useful to ensure that the initial interpretation of each topic remained related to the topic under discussion and therefore replicability within the analysis. Using the interview structure in this way enabled me to capture the participants specific responses to, and individual interpretations of, the issues raised. Keeping a close link between the intention of the interview question and the participant comments in this way helped to maintain the accuracy and reliability of the analysis. Many authors identify that the accuracy of the representation can be reduced by the research process as the researcher strives to draw out key points and interpretations (Blaxter *et al.* 2010, Robson 2011, Miles *et al.* 2013). As such, Miles, *et al* (2013) advocate that when reading through empirical data the researcher needs to reflect on how the respondents come to understand their own situation. Similarly, Blaxter, *et al*, (2010) warn that qualitative and quantitative data tend to blur a little in the analysis stage as researchers use language to explore and interpret it with the result that “*qualitative data may be quantified and quantitative data qualified*”, assigning numerical values or representations to qualitative data, such as ‘*all the interviewees*’, ‘*three quarters of the respondents*’, and likewise with quantitative data when discussing the “*relative worth*” of different data sources and interpreting what results may mean (*ibid.* p. 199). This underlines the need to consider both the context and meaning of words when looking to interpret data.

This stage produced a clear understanding of what had been discussed, with large sections of commentary coded to relevant topics. A series of text searches were also used to look specifically for the use of traditional keywords and phrases used within the literature, such as deductive or inductive, but these were rarely seen within the transcripts. Therefore, it was important to consider the larger blocks of narrative to explore the details and nuances of the discussion and evaluate the context in which details were situated.

The next round of analysis was then developed more iteratively as the participants own keywords were unearthed. Within the boundary of the topics identified through the coding manual, there was room for inductive coding as new issues and parameters were identified, resulting in an extensive list of nodes, each populated with long paragraphs from the interviews. I feared misinterpreting or missing something, so matched large chunks of the audios or transcripts to the nodes. Unfortunately, this resulted in over 80 nodes being identified making the analysis very dense, as shown in Appendix 12-12, p. 242, and at this stage it did not appear to offer any clear answers to the research questions. The coded interview content was then analysed to search for and identify themes and descriptions of strategy making that might compare or contrast with the concepts offered through the literature whilst trying to avoid bringing in excessive prior-theorizing to the theme-identification.

Rationalisation into a more topic-oriented coding, as shown in Figure 6-10 overleaf, allowed for the clearer themes to be identified and related back more purposely to the ideas and questions that the research was focused upon.

Interview section	Question	Topic
Welcome Purpose: confirm respondent had read PI, discuss issues, gain consent		
Main interview Purpose: Identify role of respondent & understand 'context' when developing media Strategy (MS)	Can you tell me what your role is?	Role
	Could you summarize the key responsibilities of your role in relation to communications and media planning?	Responsibilities
	Do you work in any specific field/specialism within the media planning function?	Work focus/specialisation
	How does it relate to media planning and evaluation?	Involvement with media planning and buying

Figure 6-10: Extract from final interview coding and naming of themes

The resulting list drew out 30 core topics around which themes could be clustered and collated to identify key similarities and differences across the participant pool and triangulated against the literature where relevant, with data being moved to relevant nodes and extraneous narrative removed to clean up the analysis in Nvivo. A full list of the 30 core coding themes is shown in Appendix 12-13, p.243.

The aim was to explore this industry sector and identify issues or connections within the data that might inform the concepts of media strategy formation under dynamic conditions of complexity and identify if any changes might be advocated to the current frameworks.

The final analysis identified hundreds of different possible keywords from the interview data. Through repeated analysis and reference to the literature, it was possible to identify overlaps, nuances and semantics so that keywords with the same meaning could be clustered together.

Theme	Example statements	Keywords Concepts	Final Coding	Implication
Changes in the Planning Environment	Operating on the edge of chaos [MD1]	Edge of chaos	Turbulent, complex, volatile environment	Supports assertion that media planning is now enacted in a complex, turbulent and unpredictable state
	[With] the introduction of digital and social channels, the greater agility and flexibility we're working too [MD2]	Agility and flexibility		
	Incredible change that's taking place [MD3]	Incredible change		
	Speed, rate & pace of change unprecedented [MD1]	Speed, rate & pace of change		
	Agility & speed important [PD3]	Agility & speed		
	Digital can scale things very quickly [PD1]	Scale things very quickly		
	the last four or five years has become a far more frenetically haste [SD1]	Frenetic		

Figure 6-11: Example of statements, concepts and coding

At this stage the themes were named more clearly, and exemplars were captured to provide evidence of the theme and how they relate back to the research question (Guest *et al.* 2011, Scharp and Sanders 2019). An example of the theme, statements, concepts and coding is shown in Figure 6-11.

6.5: Study 2: Media Planners Survey

Study 2 was designed to answer RQ3: What types of data do media planners currently use to formulate the media strategy and plan? The sub-questions of this were to identify what data media planners use and have access to when undertaking the media planning task.

As identified through the literature media strategy and planning is considered to be a multi-criterial decision making (MCDM) process and that a wealth of data needs to be

assessed to achieve the optimal solution. The main research study in this area was undertaken by Cowan and Abratt in 1999. Their work established fourteen key categories, with sixty-eight variables, that planners might use and asked marketers and planners alike to rank them in order of importance to the media plan, as shown in Figure 6-12 below.

Budget Information	Media Information
Communications Planning Information	Objectives Information
Competitive Information	Product & Brand Information
Creative Information	Reach & Frequency Information
Consumer Behaviour Information	Sales Information
Historic Information	Segmentation & Target Information
Market Size Information	Timing Information

Figure 6-12: Key categories of data used in media planning and buying (Cowan & Abratt, 1999)

They noted differences between their two respondent groups that indicated media planners were quite implementationally focused and not as concerned about the wider marketing and business goals as the marketers. Arul (2012) repeated very similar research in India and found less variation in category priorities between the two cohorts, perhaps indicating some changes have occurred over the intervening decade.

Rather than directly repeating the previous research, the aim of this study was to build on it, aiming to both check if media planners still used the same data sources and if there are any new data sources.

This data supported Study 1 and added depth to the understanding of the current approaches that media planners take to design the media strategy.

6.5.1 Survey design

Given the exploratory nature of the research question, a qualitative approach was taken for the data collection method, using a survey comprising both closed and open questions that could be evaluated through content analysis.

- Closed questions were used for respondent identification and screening. As per Cowan & Abratt (1999), respondent identification was kept short to encourage completion, requesting organisational type and role, with the role choices being comparable with the previous research.
- The main body of the survey gathered data via open-ended/free-response questions to capture the spontaneous and unprompted answers of respondents (Brace, 2010, p 45).

This method was chosen over the closed questioning used in the previous studies (Cowan & Abratt, 1999, Arun, 2012) to prevent respondents from merely accepting suggestions from a list of options. Recording spontaneous responses is also a good technique for determining what is at the forefront of a person's mind: being information they can easily access, which, according to Brace (2010, pp 48) can be interpreted as adding weight or importance to the items and attitudes mentioned and potentially identifying new issues.

The final wrap up section of the survey thanked respondents for their time and reiterated a few elements from the attached PI. It also invited respondents to email me if they were available to take part in Study 1, as shown in Figure 6-13 overleaf.

Section 1	
A little about you In this section, you will find some profiling data that will help to analyse the data collected	
1. Please indicate which of the following most closely describes your current role and experience	
Select an answer ... If you selected Other, please specify: <input type="text"/>	Choices offered: <i>Agency Board Director, Media Director, Media Manager, Media Planner, Marketing Director, Marketing Manager, In-House Media Specialist, Other</i>
Section 2	
2. Please list the data and information types that you are given and have access to use for the development of your media plans.	
	More info <i>The information sources listed here should only include the data that you have access to when starting and making your planning decisions – not what you would like to have or wish you had access to 😊. If you are tempted to just write ‘a brief’ it would be helpful if you could itemise the types of data/information that you gain through that briefing. Thank You</i>
Section 3	
3. Please list the data and information types that you would like to have access to for the development of your media plans.	
	More info <i>This section should include information / data that you feel would improve your ability to plan effectively, whether that be more creatively or efficiently. Data that you know exists and that could be shared with you but it not. So please list your frustrations! If you are feeling creative and there is information that is just not available but would be of great benefit to all, please put it in brackets.</i>
Section 4	
4. If you have listed data above that you would like to receive, but are not given / cannot get, please could you tell me why you think you do not get the data you require.	
Section 5	
Thank you for taking the time to complete the little survey. The results will be reviewed and formulated into a paper for my PhD. Moving forward... as I wrap up my findings, I am looking for some quick updates on current practice around how practitioners approach media strategy formation; what models, theories or practices you use to help shape the campaign deliver, how you define success & effectiveness and what metrics and measure you use to plan, evaluate and measure campaigns. If you could spare 30 minutes I would love to send you a more detailed survey or chat via Skype to collect details of your thoughts and practice around the information you use and the decisions you take in relation to media strategy and planning. If you would be interested in participating, please email me at bbarker@bournemouth.ac.uk and I will forward you more information. Many thanks, Beverly Barker	

Figure 6-13: Study 2 survey details

6.5.2 Piloting and testing

The survey was built via Bristol Online Survey (BOS) and tested over three iterations using think-allowed techniques to elicit real-time commentary in relation to the clarity of the survey structure. The initial pilot question was simply ‘*what information do you use to develop a media plan?*’, but pilot respondents voiced frustration about things they did not have access to, therefore, a second question was added to the final version, ‘*what information would you like to have?*’ The final pilot added a further question to allow respondents to explain their answers in more detail should they wish to. The pilot responses were also exported from the BOS system and evaluated in Excel to ensure that the output would be analysable and usable, although the data was not included within the final analysis.

The resulting survey included the following questions plus a salutation thanking respondent for their participation:

- *Q1: Please indicate which of the following most closely describes your current role and experience*
- *Q2: Please list the data and information types that you are given and have access to use for the development of your media plans*
- *Q3: Please list the data and information types that you would like to have access to for the development of your media plans*
- *Q4: If you have listed data above that you would like to receive, but are not given / cannot get, please could you tell me why you think you do not get the data you require*

6.5.3 Ethical considerations

In relation to consent, the email or social media invitations sent to media planners outlined the purpose of the survey and contained a hyperlink back to BOS survey. The initial page of the survey carried a description of the research similar to the PI. Respondents were informed that their participation was entirely voluntary and that they could withdraw at any time and invited to download the PI at that stage of the survey process. Consent was explained and achieved by the action of clicking 'Next' to undertake the survey itself. No identifiable data was collected to ensure that data protection laws and regulations were adhered to.

6.5.4 Sampling approach

As noted earlier, the population for this survey was marketers and media planners who are involved in the briefing process needed to develop a media plan. The sample was identified via non-probabilistic approaches using a purposive selection of known contacts, convenience and snowballing (McGivern 2006, Saunders *et al.* 2015). The identification as to the respondent's level of experience or seniority within the industry was included within the initial respondent data screening questions.

The initial seeding was to my media contacts via a range of social media links posted on Twitter, Facebook and LinkedIn and relevant social media groups, such as 'Those in Media' and 'Media Minds', which have a base of over 4,000. In addition, private email, messenger and in-mail was used to reach media and agency contacts and 'snowballed' to fellow professionals (Yin 2017).

6.5.5 Sample size

The first survey link went live in January 2014 when ethical approval was first obtained at London South Bank University (LSBU). This was the pilot stage and led to the amendments described in section 6-5-5 above. The survey was initially distributed across January – July 2014, generating 78 usable responses. Due to my change in university research centres in 2014, ethical approval was reapplied for and confirmed in September 2015. As a result, a 2nd wave was undertaken across January - July 2016, which yielded 15 new responses, which was used to both extend the sample base and corroborate the previous data. Overall, 93

responses were accumulated. The majority described themselves as Media Director (MD) Media Manager (MM), Media Planner (MP), Marketing Director (MktD), Marketing Managers (MktM). Cumulatively there were 21 senior media director level respondents, 52 mid-level media planners and 20 marketers, including one Marketing Director, as shown in Table 6-3.

Media Planners				
Agency Board Director	2			
Media Agency Board Director	6			
Media Director	13	Total MD Level	21	
Media Manager	32			
Strategist	1			
Media Planner	19	Total MP Level	52	Total Media
				73
Marketers				
Marketing Director	1	Marketing Manager	19	Total Marketers
				20
Grand Total				93

Table 6-3: Summary of Respondent Profile and Sample Size by Job Roles

The sample was comparable to previous research by Cowan & Abratt (1999) which was based upon 67 responses, 33 media personnel and 34 marketers as shown in Figure 6-14 below.

TABLE 4: RESPONDENTS BY DESIGNATION AND EDUCATION LEVEL			
Sample	Designation	No.	%
Marketers	Marketing director	7	20.6
	Marketing Manager	16	47.0
	Product/Brand Manager	11	32.4
Total		34	100.0
Media Personnel	Media Planner	24	72.7
	Media Director	9	27.3
Total		33	100.0

Figure 6-14: Respondent base for Cowan & Abratt 1999

6.5.6 Data collection

As outlined above, an open-questioning technique was used for the two main questions:

- Q2 Please list the data and information types that you are given and have access to use for the development of your media plans.
- Q3 Please list the data and information types that you would like to have access to for the development of your media plans

Data collected was in the form of free-flowing sentences, mostly composed of staccato nouns describing data and information sources used or wanted for the development of the media plan. Answer formats were similar across both survey waves, perhaps reflecting the familiarity that both media planners and marketers have with the briefing process, although the actual information/data items listed differed noticeably across the respondent base, as outlined in the example of responses from Media Directors shown in Table 6-4 overleaf.

The data from Q4 was retained to help with the interpretation of the findings, together with the information gained through the in-depth interviews.

Q1	code	Q2.	Q3
Media Agency Board Director	MAD4	campaign dates, budget, media campaign objectives, target audience, landing page URL, comms strategy - idea of media channel mix, formats to be built if already known	over-arching business objectives; what else is the client doing internally; an idea of creative team capacity; creative capability; what creative will look like; landing page URLs
Media Agency Board Director	MAD5	budget TA KPIs, assets, timing, PR schedule, competitive setting, sales targets, platform usage, product info	social / PR schedule; long term strategy; creative messaging; restrictions; product distribution;
Media Director	MD7	dates; budget; target audience; creative assets; platforms/share; success metrics; KPIs; objectives; company/marketing factors	overarching business strategy; previous cases; detailed up to date audience insight; schedule for other runs/type of activity; competitive activity in market info

Table 6-4: Excerpt of responses from Media Directors

Before being analysed the data was exported to Excel and assessed for readability. At this stage job roles were coded to ensure that respondents of similar levels of experience and seniority could be clustered and compared through the analysis. In the example shown, the respondent was coded MAD4, the 4th Media Agency Director to complete the survey.

6.5.7 Data analysis

Given the nature of the research question to find out ‘what’ data types and information was being used and accessed, content analysis, or “*codified common sense*” was selected as the primary method to analyse the qualitative questionnaire data and help code the open-ended questions in the survey (Robson 2011).

The unit of analysis, or recoding unit, was in the main the individual words. This enables every occurrence of a word to be treated as equal, so that counts could be made and compared. However, with anomalies in spelling and jargon terminology, the analysis included more sophistication and looked to differentiate between the different senses of words that might have multiple meanings (e.g. ‘targets’ as ‘audience’ and ‘targets’ as KPIs), or different words that have similar meaning in the context of the study (e.g. ‘segmentation’ and ‘segments’). In addition, coding phrases were identified that constitute a semantic unit (e.g. ‘target audience’). To do this it is important to remember how the research question guided the survey design and sampling strategy. This provides the context to aid the interpretation but also means that there should be an awareness of any research reactive effect on the data (McGivern 2006, Robson 2011).

Based upon this approach, data was uploaded to Nvivo following the Excel coding of respondents. Here a parent and child node hierarchy was set up based upon the 14 categories outlined in Figure 6-12 (see p. 133), and the 68 sub-categories of information suggested by Cowan & Abratt (1999). These formed the basis of the initial coding manual used for the analysis and are presented in Appendix 12-14 (see p. 245).

Auto coding was undertaken to match the resulting units, statements, stems and synonyms to the coding scheme. The word density report shows the actual number of times a phrase or word was identified within the data set. As shown in Table 6-5 overleaf, there were 74

mentions of Budgets, including ‘budget, budgets and budet’, and 70 mentions of ‘objectives and Obj’, which are likely to be mutually exclusive.

Budget	6	73	4.51	budget, budgets
	5	1	0.06	budet
		74		
Competitive	10	6	0.37	competitor, competitors
Creative	8	24	1.48	creative
Historic	8	9	0.56	historic, historical, historically
Objectives	10	64	3.95	objectives
	3	6	0.37	obj
		70		
Product & Brand	7	18	1.11	product, products
Seg & Target	8	57	3.52	audience, audiences
	8	11	0.68	segmentation, segments
	12	4	0.25	demographics
	6	56	3.46	target, targeting, targets, targetting
		128		
Timing	7	16	0.99	time, times, timing, timings
	9	11	0.68	timeframe
	10	1	0.06	timeperiod
	8	2	0.12	timeline
		30		

Table 6-5: Auto-coding including stems and synonyms

However, this analysis demonstrated that the system could not auto code all of the data collected as there were many terms which were misinterpreted when clustered with stemmed words or synonyms. In some cases, seemingly obvious stems were missed, such as KPI and KPIs. Conversely, because the use of ‘jargon’ and the absence of context, many words were not recognised correctly, and some terms were mistaken for synonyms when they were not. For example, targeting and target audience can be combined, but goals and targets, cannot, as one is a description of campaign audience and the other objectives and success metrics.

Furthermore, the obvious top line matches by node were misleading as some respondents had used two or three phrases to explain the same type of data and therefore were not being aggregated effectively. For instance, one respondent identified ‘*target audience/universe*’, whilst another described ‘*acorn profiles of existing customers for analysis/look alike*’, which meant that any ‘count’ of terms did not effectively represent a true weighting of word usage amongst the respondents. For example, there were 128 phrases that could relate to segmentation and targeting, including “*Audience, audiences, segmentation, segments, demographics, target, targeting, targets, targetting*”, which is not only more than the 93 responses received, but includes phrases which might not actually be synonyms when read in the context of the respondents actual list. In addition, it was evident that there were data sources mentioned that had not featured at all in Cowan & Abratt’s (1999) work.

The next layer of the coding was to review each respondent statement individually and manually code each phrase to the most relevant node. Many of these were straightforward, as seen in Table 6-6 overleaf which outlines the example of coding respondent MAD4. Statements such as budget and target audience could easily be coded to the ‘budget’ and ‘segmentation and targeting’ category.

Questions	Q2 Please list the data and information types that you are given and have access to use for the development of your media plans	Q3 Please list the data and information types you would like to have access to for the development of your plans
MAD4 responses	<i>campaign dates, budget, media campaign objectives, target audience, landing page URL, comms strategy - idea of media channel mix, formats to be built if already known</i>	<i>over-arching business objectives; what else is the client doing internally; an idea of creative team capacity; creative capability; what creative will look like; landing page URLs</i>
Budget	<i>budget</i>	
Communications Planning	<i>comms strategy - idea of media channel mix</i>	<i>what else is the client doing internally</i>
Competitive		
Cons Behaviour		
Creative	<i>Formats to be built if already known</i>	<i>an idea of creative team capacity; creative capability; what creative will look like</i>
Historic		
Market Size		
Media		
Objectives	<i>media campaign objectives</i>	
Product & Brand		
Reach & Frequ		
Sales		
Seg & Target	<i>target audience</i>	
Timing	<i>campaign dates</i>	
Un-coded	<i>landing page URL</i>	<i>landing page URLs over-arching business objectives</i>

Table 6-6: Example of coding respondent MAD4

Other units required more exploration. To identify how to code these the full list of sub-categories was reviewed again to get underneath the meaning of the categories and sub-categories in terms of how they applied to the media planning process. This identified how different terms had previously been used and helped to identify whether any of the un-coded terms represented new terminology that fitted under an existing category. For example, respondents used the phrase ‘Campaign Dates’ frequently. Although the exact term was not found in the sub-category field, the broad description of ‘Timing information’ was appropriate because the sub-category descriptions included ‘lead times for media, forthcoming events or activities that need to be noted, length of consumer purchase decision, brand and product life cycle and time imperatives for the current advertising campaign’, as shown in Figure 6-15. Based upon the last sub-category relating to time-imperatives, “campaign dates” was coded to the node Timing information/time imperatives for the current advertising campaign.

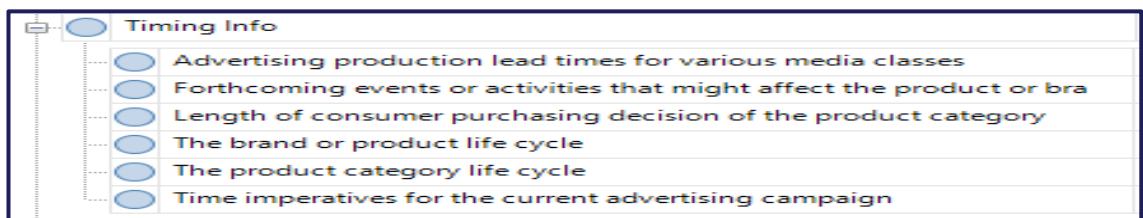


Figure 6-15: Sub-categories for Timing Information (Cowan & Abratt, 1999)

This process was followed to allocate a number of further terms, but there were still a number of uncoded elements that needed to be addressed.

Adding new sub-categories

Again, drawing on the MAD4 example, “formats” was a term that was listed by many respondents but not easily coded. It is a phrase commonly used, alongside ‘assets’, to

describe the physical creative elements suggested or requested by a client. As a consequence, it was added to the category node for 'Creative Information' as it is descriptive of the 'advertising campaign's creative strategy' (see Figure 6-16). However, to ensure that the thinking was transparent a new sub-category was added to explicitly identify creative assets and formats.

[-] Creative Info	
[-] NEW Creative Assets and Formats	
[-] Past advertising themes of the brand or product	
[-] The advertising campaign's creative strategy	
[-] The complexity of the advertising message	

Figure 6-16: New Sub-category for Creative Information

Following this example and to ensure that the thinking behind the coding was clear, transparent and replicable, further new sub-categories were added to the information lists for Objective Information, Communication Planning and Strategy Information, Consumer Behaviour Information, and Media Information based upon the following rationale.

→ **Objectives Information:** As shown within Table 6-6 (see p. 139), “*over-arching business objectives*” was uncoded. In fact, many respondents mentioned “*business objectives*” and “*goals*”. The literature indicates that media planning is a derivative of the client’s business and marketing goals, and as Katz (2013, p. 37) notes, when developing the media strategy, the planner should be “*cognizant of the way in which the organisation has determined to achieve the organisational objectives*”, because that will shape the media plan. These information sources were therefore added as a new sub-category node, to accompany the other ‘Objectives’ information, as shown in Figure 6-17.

[-] Objectives	
[-] Brand or product marketing communication objectives	
[-] Brand or product marketing objectives	
[-] NEW Brand or product organizational Business Goals and Objectives	

Figure 6-17: New Sub-category for Objectives

→ **Communication Planning and Strategy Information:** a new sub-category was added for internal client/customer communication via ECRM and Email activity (see Figure 6-18) to provide a more comprehensive understanding of what activity is being carried out.

[-] Communication Planning and Strategy Information	
[-] Information Direct marketing plan and strategy of the brand or p	
[-] Information Public relations and publicity plan and strategy of th	
[-] Information Sales promotion plan and strategy of the brand or pr	
[-] NEW ECRM and Email activity	

Figure 6-18: New sub-category for Communication Planning and Strategy

→ **Media Information:** Reflecting the trend towards clients organising and buying some of their own digital media, a number of respondents talked about “*media restrictions*” and “*preferred platforms*”. This also reflects the move towards brand safety guidelines that has occurred, particularly for programmatically bought activity. Therefore, clients often clarify

who they have deals with, environments and content that they wish to be associated with, and sites that they do not wish to be associated with. To reflect this a new category of 'Preferred Platforms and Restrictions' was added (see Figure 6-19).

Media Info	
<input type="radio"/>	Advertising clutter of the medium or vehicle
<input type="radio"/>	Advertising production costs for various media classes
<input type="radio"/>	Advertising production lead times for various media classes
<input type="radio"/>	Cost per thousand of the media vehicle
<input type="radio"/>	Credibility of the media vehicle
<input type="radio"/>	Editorial environment of the media vehicle
<input type="radio"/>	Longevity of the medium or vehicle
<input type="radio"/>	Media vehicle's primary function (e.g., to entertain, inform, advert
<input checked="" type="radio"/>	NEW Preferred Platforms & Restrictions
<input type="radio"/>	Number of different media classes to be used in the campaign
<input type="radio"/>	Potential or available measures of advertising effectiveness of the
<input type="radio"/>	Relationship between the audience and the vehicle
<input type="radio"/>	Reproduction quality of the media vehicle
<input type="radio"/>	The geographic flexibility of the medium
<input type="radio"/>	The production flexibility of the medium
<input type="radio"/>	Traditional and nontraditional media vehicle options available

Figure 6-19: New sub-category for Media Information

→ **Consumer Behaviour Information:** two new sub-categories were added to this category as shown in Figure 6-20. The first relates to customer feedback, which helps to shed light onto customer attitudes, opinions and motivations is linked to consumer behaviour as shown through the literature. The second links to the Customer Journey and Pathway to Purchase information. Customer Journey / Pathway to Purchase data is comprised of customer data, research and analytics that aim to understand the steps that an individual may take to make a decision. It is heavily underpinned by the consumer behaviour literature, such as theories around hierarchies of effect.

Consumer Behaviour Info	
<input type="radio"/>	Consumer buying behavior of the product category
<input type="radio"/>	Consumption or usage patterns of the brand or product
<input type="radio"/>	Consumption or usage patterns of the product category
<input checked="" type="radio"/>	NEW Customer feedback
<input checked="" type="radio"/>	NEW Customer Journey and Pathway to Purchase Insight
<input type="radio"/>	The expected reaction to the advertising message

Figure 6-20: New sub-categories for Consumer Behaviour Information

In this way six new sub-categories were added to the pre-existing categories. However, it still did not allow for all of the data to be comfortably coded. The final step came with the reconceiving categories altogether.

Re-naming categories

A major coding decision was taken around the Reach and Frequency category. Across all of the data collected, not a single respondent mentioned Reach and Frequency. As identified through the literature, this is currently seen as a traditional and potentially outdated KPI for

planners to work to. However, examining the sub-categories descriptions showed that the content was focused on exposure targets and linked to the number of sales messages to be delivered. These are solid guiding metrics that still under-pin media planning, particularly in relation to digitally oriented campaigns, but are now referred to as Key Performance Indicators (KPIs). As identified in the literature, organisations tend to track multiple KPIs, often using a Balanced Scorecard approach to avoid KPIs becoming goals. KPIs help align everyday efforts with the longer term and act as a ‘compass’, determining if the organisation is moving in the right direction (Binet and Field 2017) and make it easier to catch errors and uncover opportunities whilst remaining focused upon the required strategy (Morhardt 2019). Multiple directional KPIs are prevalent within direct-response oriented media planning, such as establishing the Cost of Sale (CPS), Cost per Click (CPC) or Click Through Rate (CTR) needed to meet the sales targets within the budget.

Key Performance Indicators	
<input type="radio"/>	Advertising exposure (reach) and continuity (frequency) req
<input type="radio"/>	Average frequency of the media vehicles schedule
<input type="radio"/>	Media vehicle audience exposure (reach)
<input type="radio"/>	NEW KPIs for the media activity
<input type="radio"/>	NEW Targets and Benchmarks for the campaign
<input type="radio"/>	Number of sales messages intended to be communicated i

Figure 6-21: Renamed category and new sub-categories for KPIs

Similarly, Targets – whilst not the same as KPIs - are directly related, being a level or benchmark needed for the outcomes. Because of this insight, it appeared that KPIs and targets were similar in nature to the elements of the reach and frequency category and superseding it in terminology. As a consequence, the whole category was renamed Key Performance Indicators with clear new sub-categories for KPIs and Targets added to ensure that the thinking was transparent (see Figure 6-21).

Creating new information categories

The final focus was on the remaining un-coded units. Looking again at Table 6-6, the respondent used the phrase ‘*landing page URL*’. This refers to the newer category of owned media, as identified in the literature. Landing pages can include the clients’ website, social media sites or dedicated campaign micro-sites. As part of the customer journey, landing pages often sit on the pathway between awareness, consideration and action and may contain some final application details or a link to an application form that lies behind a secure firewall.

Owned media did not fit neatly with the definitions provided within the existing ‘Media Information’ sub-categories which were focused on paid media, as seen in Figure 6-19 (see p. 141). They could be shoehorned into ‘Traditional and non-traditional media vehicle options available’ but this is not a good reflection of the importance and positioning of owned media in today’s complex planning environment and seems inconsistent with the definitions of traditional and non-traditional media seen at the end of the 1990s. In addition, it is not a plannable ‘option’ for the media planner as it is in the control of the client organisation.

However, looking at the literature, driving prospects and customers through the conversion funnel is often a key goal, and understanding the final success or failure of a course of action is vital, so the landing page is a major part of the customer journey and often has a direct relationship with understanding effectiveness of the other media being used. Building on this, as a part of the customer journey, it can also be related back to the messaging and the onward click stream from the initial awareness or search formats through to the client website. It could, therefore, be placed under Creative information. Likewise, landing pages can be used to provide details that deepen consideration near the end of the customer journey and link directly to sales, therefore the statement could be applicable to the sales category, as a part of the distribution strategy (see Figure 6-22).

Sales Info	
Brand or product sales and distribution strategy	
Customer sales analysis of the brand or product	
Geographical sales patterns of the brand or product	
Month or seasonal sales patterns of the brand or product	
Monthly or seasonal sales patterns of the product category	
Sales forecasts of the brand or product	
Sales history of the brand or product	
The unique selling proposition of the brand or product	

Figure 6-22: Sub-categories for Sales (Cowan & Abratt 1999)

A similar debate arose around where to place mentions to owned media tracking and tools such as Google Analytics. These could have been placed under the Historic information category as they might be a source of data for tracking 'Past history of responsiveness to advertising of the brand or product' as shown in Figure 6-23. But tracking data such as this can do much more and may link up a number of channels, journeys and campaigns.

Historic Info	
Historical development of the characteristics of the product category	
Historical development of the characteristics of the brand or product	
Past history of responsiveness to advertising of the brand or product	

Figure 6-23: Sub-categories for Historic Information (Cowan & Abratt, 1999)

This is a good example of how media planning requirements have changed since the original research was conducted, particularly in respect to media directing audiences to an online search or landing page used to convert consideration to sales. The journey has been disintermediated in many ways, with manufacturers going directly to customers. It also demonstrates the interconnectedness of the data that media planners deal with, as discussed in Chapter 5.

Finally, this information is the clients first-party data, collected from interactions with their prospects and customers, and therefore an asset with the potential to deliver competitive advantage. These deliberations showed that a new category of Owned Media was useful to

differentiate this information from other data categories, and to cover the range of detail within this category, four sub-categories were added (see Figure 6-24).

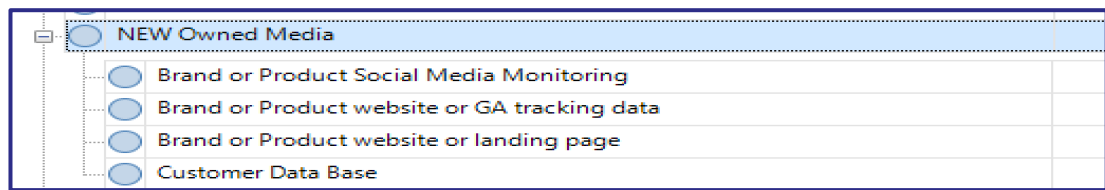


Figure 6-24: New category for Owned Media

Following this procedure, Nvivo ‘Detail view’ was used to explore the data, using the coding stripes to see which data had been coded to which node as shown in Figure 6-25. This identified that around 95% of the statements were able to be coded in this initial analysis.

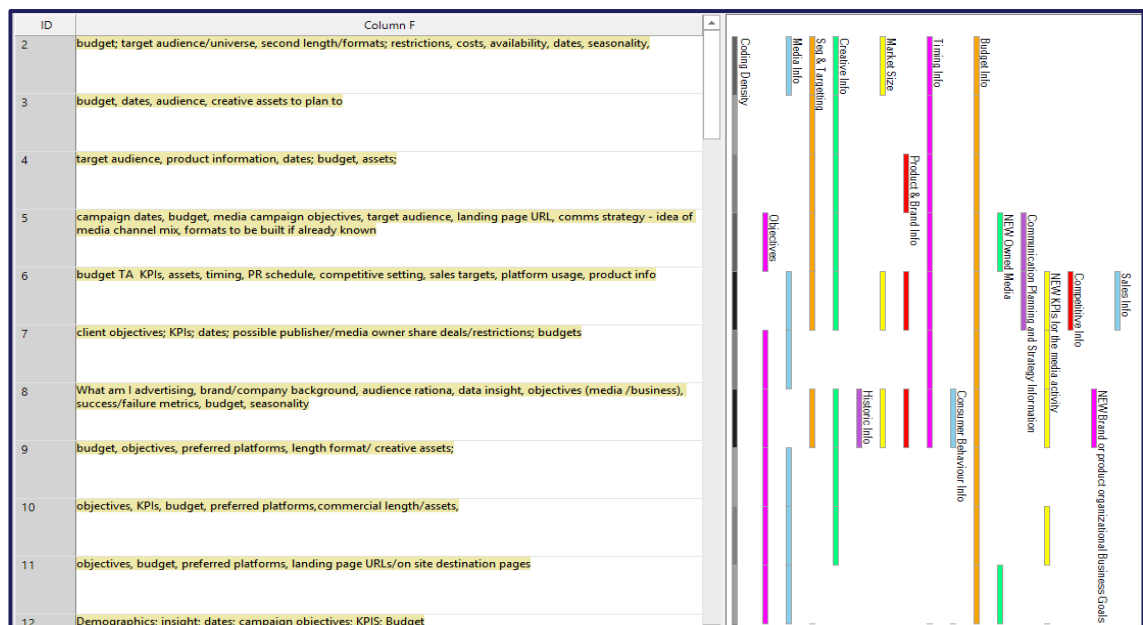


Figure 6-25: Extract from Nvivo coding demonstrating coding to major categories

The remaining statements were around ‘a brief’, and the people that are involved in the briefing process. Revisiting the Cowan & Abratt (199) categories, there was no relevant place to code this data to. However, by looking back at the IPA/ISBA recommendations around briefing discussed in Chapter 4, this data relates to ‘Project Management’, described as being the basic facts about the project and its administrative details, practicalities and approvals, such as planning process timings, responsibilities and mandatory/legal issues (ISBA 2011). Therefore, a suitable new Project Management category was added (see Figure 6-26).

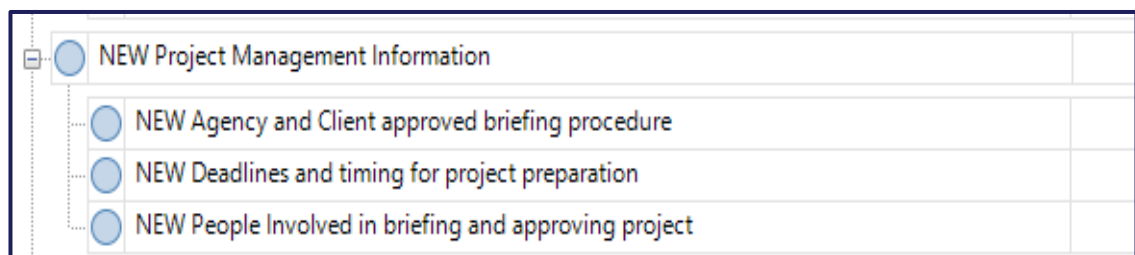


Figure 6-26: New Category for Project Management

6.5.8 Validity and reliability within the analysis

The research question for this study was to identify ‘What types of data do media planners currently use to formulate the media strategy and plan?’ This was driven by the fact that the literature relating to this dated from 1999, with some minor adjustments across 2012-2013, and was perceived to be out-dated (see Chapter 4, section 4.4, p. 76). The research was designed to draw out this information. The ‘construct validity’ was therefore confirmed as it addresses the problem that the current checklist for media briefing may not be up to date (McGivern 2006, p. 336) and offers insight into what new aspects should be added. As outlined by the discussion here, the final list used for the data coding included fifteen new sub-categories, two new categories, [Owned Media and Project Management], one renamed category, [Key Performance Indicators] as shown in Table 6-7.

Category	Name
Communication Planning and Strategy Information	NEW ECRM and Email activity
Consumer Behaviour Info	NEW Customer feedback NEW Customer Journey and Pathway to Purchase Insight
Creative Info	NEW Creative Assets and Formats
Media Info	NEW Preferred Platforms & Restrictions
NEW Owned Media	NEW Brand or Product Social Media Monitoring NEW Brand or Product website or GA tracking data NEW Brand or Product website or landing page NEW Customer Database
Objectives Info	NEW Brand or product organizational Business Goals and Objectives
NEW Project Management Info	NEW Agency and Client approved briefing procedure NEW Deadline and timing for project preparation NEW People involved in briefing and approving project
Reach & Frequency Info	NEW KPIs for the media activity
Key Performance Indicators Info	NEW Targets and Benchmarks for the campaign

Table 6-7: Additions made to the original Cowan & Abratt Coding Manual

Reliability is also a consideration, and to ensure that the research can be repeated the methods and analytical thinking are articulated in depth. Content analysis was used to systematically identify, enumerate and analyse the occurrences of specific respondent statements. Because the data was highly contextual in nature, it was important to understand the meaning associated with the words when developing the content categories and unitising. This included looking for symbolic, syntactical, referential and thematic units and ensuring to continuously contextualise the respondent in the construction of the units (Bamberg 2012). This was assisted by maintaining visibility of the respondent ID which helped with interpreting the meaning offered to remember that the text was representative of the respondent’s interpretation.

This is inescapably a subjective representation of the text, although the extensive description is offered here to make the process as transparent as possible. Inter-coding reliability is an important aspect underpinning the reliability of research. However, as a sole researcher, this was problematic to achieve. Therefore, to support the Nvivo coding, the

statements were also coded through Excel using the data search facility to identify words in statements and count them (see Word Frequency Report Appendix 12-15, p.247). This was a useful functional cross-check to ensure that phrases and statements were not overlooked or miscoded. The data was then processed through pivot tables to identify the number of statements by respondent roles. In the end, the number of nodes was compared to the number of data points identified in Excel to ensure that the coding was consistent. At a semantic level, it is possible that another researcher might categorise the data differently. In terms of the reliability of the findings, the transparency of process outlined here is offered to underpin the reliability of the interpretation – however, it is possible that if the respondents were re-surveyed in the future, they might include different statements, based upon the interactions and issues that they had faced in the workplace in the intervening time. Therefore, new results might be found.

Whilst a degree of triangulation has been described throughout the analysis procedure, the overall findings from this study are outlined in Chapter 8.

Chapter 7: Study 1 findings from media planner interviews

This chapter presents and analyses the data collected from Study 1 which was designed to answer RQ2: What are the narratives around how media planners currently approach media strategy and planning? As identified in Chapter 6, an exploratory, qualitative approach was appropriate for this employing in-depth interviews to capture participants own narrative around how they approach the complex strategy making issues in media planning in this dynamic environment of uncertainty and turbulence.

The interviews followed the structure developed for the interview guide (see Appendix 12-11 p. 240). This commenced with an introduction to the aims of the research and discussion of participant consent. This was followed by further discussion around the participant's role and responsibilities before asking about their approach to strategy making and media planning, the data inputs they consult and the timeframe for their strategy making. These aspects are analysed and discussed below.

7.1: Respondent roles and responsibilities

The opening questions were designed to allow participants to relax whilst illuminating how their role meets the sampling criteria and informs their approaches to media planning and strategy formation.

7.1.1 Participant roles and responsibilities

The participants were encouraged to describe what they do and establish the nature of their responsibilities around media strategy, as shown in Figure 7-1.

<p>Beginning of core interview...</p> <ul style="list-style-type: none">• Can you tell me what your role is?• Could you summarize the key responsibilities of your role in relation to communications and media planning?• Do you work in any specific field / specialism within the media planning function?• How does it relate to media planning and evaluation?

Figure 7-1: Example of initial interview screening discussion

This is not always obvious from the title they have, because many senior agency staff members hold down a number of responsibilities in addition to crafting campaigns for clients. As suggested throughout the literature, job titles vary widely. Respondents described a wide range, encompassing Chief Strategy Officer, Planning Director, Planning Manager, Group Planning Director, Managing Director, Communications Strategist, Marketing Planner and Client Services Director.

When asked to confirm their role, participants offered a variety of descriptions relating to media strategy and planning and some form of 'communication planning', as can be seen from the following quotes:

“ My role covers quite a broad spectrum because planning is quite broad, and what is planning is a classic question at the moment. Specifically, I sit more at the strategic/channel planning end, as opposed to the data driven, efficiency end of planning. So my role is what I call comms

planning in its purer sense. I'm about brands. I'm about people and I'm about channels. That's where my expertise sits" [PD1]

"I have the lucky title or unlucky title of being Group Planning Director. I am actively involved in all types of client planning and strategic development" [PD2]

"My role is Communication Strategist. I always think that's quite a broad role. That is why I keep it as quite a broad title"[PD3]

"I'm a strategist, but at the end of the day our jobs, I wish we all did psychology before we went into media, because, if you work in this industry, it is to change people's behaviour, which is a ridiculously hard thing to do" [PD4]

"As Client Services Director... my role is to continually evolve how we plan and buy advertising for our agency partners and their key clients" [PD5]

"I am a Media Planner from a big agency background, and currently called Marketing Planner with a data focused media solutions provider" [PD7]

"I'm Managing Director ... The core part of the [company's] proposition is media planning and buying. The service we provide our clients is built around media planning and buying and all that that entails. [MD1]

The array of titles emphasises both the seniority of participants and their strategic input to communication solutions. Equally it demonstrates the hybrid or fused roles of the people involved. However, when trying to tease out some idea of demarcation or boundaries between some of the titles and roles being undertaken, it became clear that the role is evolving as noted by Young (2014) and there is considerable blurring of the old lines now, as noted below...

"As you know, historically there was a much more defined gap or distinction 'tween what a media agency and a creative agency did and therefore the media was much more reach driven and media driven. ... Where media planning, comms planning, audience planning, etc., etc., overlap, I'll let you be the judge of that one. I have no idea" [MD2]

The statements indicate the elevated nature of communication planning, with phrases such as 'quite broad', 'lucky or unlucky title of', 'currently called', and 'continually evolve', as opposed to the more functionally explicit term of media planner or media strategist.

This is a shift from the language used within the early media planning and selection literature and reflects the changes that were identified when reviewing the historic development of the sector in Chapter 2. The role of deliberating over the media selection was historically the role of optimising the 'intra-media' delivery within a single medium and positioned after the creative decisions had been made (Calantone and de Brentani-Todorovic 1981, Pasadeos *et al.* 1997). It was tactically focused to optimising channel delivery. However, the fragmentation of media and audiences, has elevated the role, placing media planning firmly in the centre of the communications solution. The new titles strongly support the fact that media planners are now seen as strategic partners in the development of their clients' business (George *et al.* 2013, Young 2014, Mortimer and Laurie 2019). This was clearly identified by respondents who noted the increased demands from clients for business-oriented solutions:

"We hired you to do media planning and buying, you've done that, great. Now, what's next? How are you going to help transform our business" [MD1]

In relation to the research question these statements indicate that the selected participants were in a position to be able to comment on the issues from a position of knowledge, experience and authority.

7.2: Understanding the approach to communication and media planning

The next step was to question them about their overall approach to media planning and strategy and how they consider that external or internal market conditions may impact. This was guided by the literature but without being overly descriptive to ensure that respondents describe their own experience and behaviour, as shown in Figure 7-2.

Thinking about the planning function, I would like to understand a number of issues relating to media planning, namely...

- Could you tell me about your approach to communications and media planning?
- What sort of briefing do you get / wish you could get?
- What are the biggest challenges when approaching a new campaign?
- When planning, what are the key drivers/big idea that shape your selection of channels and vehicles?
- How do you decide which channels to use?
- How do you select the most effective medium/media for the marketing communications task?
- How do you apportion budgets to them?
- What role does intuition play in planning?
- What models and theories help shape your plans?

Figure 7-2: Main questions supporting exploration of media planning

In relation to their approach to communications & media planning the considerations were diverse but a common theme was around evolution, change and that media planning is in a state of flux, which is recognisable as the conditions being described within the literature in Chapter 2. Agencies have identified that media, consumers, technology and client expectations are all changing and that their approaches need to change, as demonstrated from the comments below:

“ We’re reviewing our planning approach at the moment. One of the biggest things we’re doing is looking at how we think about channels. I think we as an agency, a lot of agencies, are very outdated in the way that we think about channels. We tend to pigeonhole them. [. . .] I think we just need to start learning to package our channels up differently, and think about them and talk to our clients differently...with a well thought through communication argument, where all those channels are working with each other and against each other” [PD1]

“ I think media planning used to follow the same rule. You can’t standardise it now. I think you really need to approach it on brand-by-brand basis and really understand the nature of a product, the goals and the audience you are trying to find out” [PD7]

“ Other than being able to distil the business problem, our approach is varied. The digital economy has meant that we’re operating on the edge of chaos. We can have standardised practices and we do have standard operating procedures around best practice but the rate and pace of change means that the process itself is becoming quite iterative and, if we look back at the work that we were developing six months ago or twelve months ago, that has moved on because of what we’ve learned” [MD1]

These sentiments show that media strategy and planning has changed and summarised in Table 7-1 and Table 7-2. They support the assertion that this is driven in part by the complexities and speed of change seen in the digital environment but also by growing demands from clients.

The dynamic nature of the media themselves and the changing capabilities of digital technologies is driving rapid changes to processes that have previously survived for decades. This corroborates the work of Kerr *et al* (2015) who assert that models developed in an age driven by mass marketing and mass advertising may not be appropriate in today's digital environment.

Theme	Example statements	Implication
Changing Planning Environment	<p><i>“ Operating on the edge of chaos [MD1]</i></p> <p><i>“ Speed, rate & pace of change unprecedented [MD1]</i></p> <p><i>“ Incredible change that's taking place [MD3]</i></p> <p><i>“ Digital can scale things very quickly [PD1]</i></p> <p><i>“ Agility & speed important [PD3]</i></p>	Supports assertion that media planning is now enacted in a complex, turbulent and unpredictable state.

Table 7-1: Theme summary – Rapidly changing environment

Theme	Example statements	Implication
Changing role of media planning	<p><i>“ I think we as an agency, are very outdated in the way that we think about channels. We tend to pigeonhole them” [PD1]</i></p> <p><i>“ I think media planning used to follow the same rule. You can't standardise it now” [PD7]</i></p> <p><i>“ If we look back at the work that we were developing six months ago or twelve months ago, that has moved on because of what we've learned” [MD1]</i></p>	That media planning is in a state of flux

Table 7-2: Theme summary - impact of change on media planning

These statements echo the observations discussed in Chapter 2, in that media and advertising, along with many other professions, are finding that their working environment is changing rapidly due to the digitisation of the marketplace (Srinivasan and Kwon 2012, Mulhern 2013, Oliver 2013). However, these statements talk to a state of flux, a rapidly changing environment that has not settled to a new norm as yet and is likely to continue changing.

7.2.1 Elevation of strategic input

In terms of the overall approach, one strong theme that was evident from the interviews was that media planning was about providing solutions to communication and business problems and that this requirement was now core to how each plan was approached:

“ In essence, [the role] is identifying core audiences or identifying a business problem, translating that into a marketing problem, using insight to derive a strategy, which is then implemented and executed using media, both paid, owned and earned” [MD1]

This requirement to consider and translate the business and marketing problem to derive the strategy was echoed by other participants, who noted the need to be more than a media planning expert and to be able to understand the impact of any recommendations on the

business. This directly reflects the media planning literature, and the fact that the media strategy is just one of the many strategies that need to be included within the marketing plan:

“ ... in terms of the old idea of an agency as a knowledgeable hub, that is sort of eroding as well. So you do have areas of say... ‘We are media specialists’, ‘we are digital specialists’, ‘we are this specialist’. But actually ... particularly in our field – you have to understand the impact on business” [PD2]

“ ...making sure that budget achieves what it needs to achieve is quite key but also, making sure that it adds value. That it is generating leads for the business. That it is generating revenue but also at the same time if I’m raising the presence of the company within the media market place” [PD6]

“ ...in my world, I generally do a lot of the communication strategy first. The communication strategy might be something like, “Get families talking about the power of teatime to bring families together,” it can be something really broad, a big insight-based thing. So then when you go into the media strategy, the media strategy is how do we get families talking isn’t it?” [PD3]

Debate was evident in the early media planning literature as to whether media selection should be considering business outcomes, with a number of authors being quite vociferous that there were far too many other external factors to be able to directly link the media placement to the end result (Zufryden 1973, 1975b, 1982, Little 1979, Pendrick and Zufryden 1991, Assael 2011). It would appear that in today’s highly accountable digital world this is becoming of central importance with planners needing to find ways to plan from a business perspective and link their efforts back to driving business effects.

These themes are summed up in Table 7-3.

Theme	Example statements	Implication
Role of the Media Planner as a business partner	<p><i>“ Required to help transform client business” [MD1]</i></p> <p><i>“ Other than being able to distil the business problem, our approach is varied” [MD1]</i></p> <p><i>“ We were running people’s businesses, which was really weird [MD1]</i></p> <p><i>“ Really important business partner” [MD2]</i></p> <p><i>“ ... impact on the business. So it becomes a business argument as opposed to a media one” [PD1]</i></p> <p><i>“ ... particularly in our field – you have to understand the impact on business” [PD2]</i></p> <p><i>“ That it is generating leads for the business. That it is generating revenue” [PD6]</i></p> <p><i>“ finding out what is the business challenges for a media planner [PD7]</i></p>	Supports principle that media planning has been elevated to a more strategic and business-oriented partnership within the marketing and marketing communications team
Involved in more than media planning	<p><i>“ clients want to grow their business and media planning has a more demonstrable impact on growing client’s businesses than it ever has” [MD1]</i></p> <p><i>“ less communication channels and more business challenges” [PD1]</i></p> <p><i>“ Commerce and communication have collided” [PD2]</i></p> <p><i>“ ...in my world, I generally do a lot of the communication strategy first” [PD3]</i></p> <p><i>“ ... insights driving your business and driving how communications work for your business” [PD3]</i></p> <p><i>“ but also at the same time if I’m raising the presence of the company within the media market place” [PD6]</i></p>	Media agencies more central to communication decisions making process for businesses

Table 7-3: Theme Summary - Increasing business focus

One of the reasons for this is that many consumer/business interactions have been disintermediated by the internet. Leads and sales can be directly generated from advertising and social media posts to e-commerce and digital marketing sites for the client to convert to downloads, sales or whatever the required outcome is. The media agencies are therefore playing a more central role in the overall communication decision making process for the business that they work with, firstly because of the rate of change and secondly because of the need for expertise, although this is seen to be resolved by moving services in house in some situations (Dew *et al.* 2009, Young 2014, Gerstman 2019, Mortimer and Laurie 2019).

7.2.2 Starting with the media briefing

The brief was mentioned as being a general starting point for developing the required knowledge around the company, their offering, their objectives and customers, so discussion around briefing was the natural follow-on question, as explored in the next section.

The core advice from the literature was to ensure that a good and detailed briefing was attained (Cowan and Abratt 1999, IPA and CAF 2003, Smith *et al.* 2003, Koslow *et al.* 2006, Arul 2012, Windapo and Cloete 2017). Briefing has been explored within the literature and it can be seen that there are a number of authors who are clear on what constitutes a good briefing. Therefore, respondents were asked about the different types of briefing that they may receive and the different situations they faced.

The overwhelming advice from the media planning literature is that media planning should be an integral part of the marketing plan where the media strategy is just a marketing strategy for the selection and use of advertising media. Media planners therefore need to be conversant with all the aims and goals of the product, and cognisant of the way in which the organisation has determined to achieve these objectives (Brown *et al.* 1957, Barban *et al.* 1993, Donnelly 1996, Katz 2019). To achieve this the briefing should include background inputs from the marketing plan and a range of data on the internal and external influencing factors, as outlined in Figure 7.3, to ensure that the planner can deliver the appropriate solution.

Research	Marketing Mix
Consumer information	Product characteristics
Economic conditions	Pricing policy
Market Analysis	Promotional Mix
Competitive Situation	Channels of Distribution
Budget information	Consumer behaviour information
Creative information	Historic information
Media information	Information concerning objectives
Sales information	Segmentation & target market information
Timing information	Market size information
Communication planning & strategy information	Reach/frequency information

Figure 7-3: Background Inputs Required in Media Planning (adapted from Barban, Cristol & Kopec, 1993; Cowan & Abratt, 1999; Katz, 2019)

Looking at the wider discourse around briefing, industry support for a good briefing was articulated through ‘*The Client Brief best practice guide*’ which advocated that a written brief should contain extensive details of the current internal and external situation (Where are we

now?), together with the overall marketing objectives (Where do we want to be?) and what the marketing team are planning to do (What are we doing to get there?) (ISBA 2011).

When looking at the respondent data it was clear that briefing is still an important but imperfect science. A number of participants had very clear ideas of their role as part of the marketing system, identifying a clear approach to processes and procedures that they believe will help:

“ We’ve got to make sure we hire the right people who have the right skills and gravitas to connect with clients in the right way. We ensure that we meet a wide range of our clients. We make sure that we interview them [the clients] around the right information and, rather than accepting the brief, like any good partner and agency, we try to truly understand what challenge is most pertinent to the business and how we can support them in their solution” [MD1]

“ So, the first thing is to really understand the brief and obviously understand the bigger picture: the world that the client’s in; the challenges they’ve got; how they use other channels; what their view is; what their perspective is. Then, really understand and interpret the brief to see what the opportunity is before we start thinking about particular solutions or channels or ideas” [PD5]

“ One of the challenges is in the briefing sessions - between the client and the agency or client and media planner – is what type of information you are trying to get in order to set up a future process” [PD7]

“ it is actually about asking the right questions so that you can really help them frame what they are trying to achieve and then you can look at what is the appropriate media” [PD2]

According to several participants, clients are not very good at briefing. For the more experienced planners it appeared to be a case of ensuring that they take the lead and ask the right questions to gain the information and insight that they require:

“ Clients aren’t very good at actually telling you what they are trying to achieve. Because they don’t really think it through... it is actually about asking the right questions so that you can really help them frame what they are trying to achieve and then you can look at what is the appropriate media” [PD2]

“ If a brand comes to a media planner or agency media specialist – and says ‘Mr Media Planner I want you to spend \$1m, can you do that?’, then the next question is, What do you want to do with this? What type of audience do you want to reach out to? Who are those people? What period of time? Is it a regular campaign? An ongoing campaign of an existing product? Or is it a launch campaign? We need to understand the nature of the product. We need to understand the nature of the audience before we start the planning” [PD7]

Some of the participants hypothesised that this might be because it is only a small element of the client’s overall scope of responsibilities and that they have a multitude of other things that they need to ‘get on with’. This was corroborated by one of the media owners who works with a lot of marketing managers and commented that:

“ briefing and liaising with an agency is only a very small part of their overall role [SD2].

It was also supported by a number of other participants who commented that they offer client training days to try and bridge the gap between what the client and agency does and overcome jargon barriers.

One participant who had worked in several large holding group media departments felt that a lot of the big brands were inclined to focus on what they know already and what has worked in the past.

“ They already know their audience. They don’t do much research on the audience or what type of new audiences they might reach out to. . . . So, one of the fail[ings] is they don’t try to find out new things about the client” [PD7]

“ Any client that gives you a brief that says they want to talk to 16 to 24 year olds immediately really upsets me, because a 16 year old is at school doing their GCSEs and a 24 year old might be having their first baby or getting married or whatever.” [PD3]

This was also confirmed by the media owners who identified that brands get stuck in their approaches to using media and that major changes to channel selection and usage really only occurs when accounts change agencies.

“ If you track when big accounts have changed their media usage, if you look at Warc and Nielson and whatever it usually coincides with change of agency” [SD1]

Several participants also noted a difference in the approach to briefing between brand campaigns and direct response/digital campaigns. The description applied to the brand briefing is reflective of Donnelly’s (1996) advice to ‘imagine’ the possible future that will deliver the marketing objectives. However, the briefing of direct response campaigns is more focused on the KPIs and ROI that needs to be delivered.

PD7 had worked in many large global agencies over the last decade and was quite vociferous on the subject:

“ If it is a brand campaign there are lots of other documents coming along - ... about the audience, . . . about the nature of the project in more detail. They tell you the story. So we can understand how we can portray this image within the media. It tells you a little bit about the brand, a little bit about the brand history. It tells you what they are trying to achieve with the upcoming campaign” [PD7]

“ With DR campaigns they are different . . . They would look strictly into cost per acquisition because this is how they report the media spend internally” [PD7]

It can be seen that the briefing was considered to be a very important aspect underpinning the media planning. Overall, media planners knew that they wanted a deep insight into the client’s world, brand and customers before starting on the strategy. This would challenge Cowan & Abratt’s (1999, p50) assertion that the media planner’s job is to take a budget and target audience handed down by others and then select media vehicles with the closest match in audience profile to the target market. The planners’ role has been elevated by the complexity of the media environment. They described supporting their work with the right people and the right research to get to know the client in depth and gain the confidence and respect with the clients so as to be taken into the client’s world. But they note that many client briefings are for ‘more of the same’ rather than ensuring that the changes found with media, customers and competitors are properly evaluated.

There is evidence, as suggested by Assael (2011) that planning is taking place in silos, but more than this, the briefing is taking place in silos too. In these cases it is not possible to properly integrate activity or benefit from possible synergies (Schultz 2006, Schultz *et al.* 2009b). Even in instances where the overarching plan is briefed into the senior communications directors, the implementational plans appear to be briefed out separately for implementation:

“ They actually get briefed separately. The budget that came to the display team on the majority of the brands [was] never split with, [say] TV because we just received the separate brief” [PD7]

“ That is where agencies should be involved and maybe they are. But it is definitely not communicated down to media buyers why it happens; we were just stuck with the figure of a certain amount of money for DR. So I think there is no integration between the pieces” [PD7]

As echoed by PD5, the need to consider the broader communication plan and take more of an integrated approach is not new but it would appear that the increase in media vehicles has exacerbated the problems around fragmentation and siloed approaches in that area:

“ We work with agency planners. So, sometimes, we get quite a diluted version of a full brief. We try and work as closely as possible with our agency partners to really understand everything they’re looking at to get the bigger picture. They will tend to give us a shorter version, or tell us what they think we need to know, whereas sometimes understanding the broader challenges, the broader things they’re thinking about, will spark an idea. As we move into a more integrated and interconnected solution, rather than the old world of just having separate channels, that’s really important. Then, you can start to work out the role and the best way and the timing and all the success factors that we’ll need to consider” [PD5]

Summing up, some participants seem to be less worried with this aspect which may suggest that they are more aware of the bigger picture issues, but the interviews suggest that information fails to flow through organisations to more siloed partners, specialists or junior media planners. This could be a conscious or unconscious failing and might reflect the siloed working environment described earlier and warrants further research to review internal briefing procedures and assumptions that might indicate why this aspect is a problem.

Theme	Example statements	Implication
<p>Clients are not always very professional in their media briefing</p>	<p><i>“ One of the challenges is in the briefing sessions” [PD7]</i></p> <p><i>“ Clients aren’t very good at actually telling you what they are trying to achieve [PD2]</i></p> <p><i>“ Requires detailed briefing and asking the right questions [PD4]</i></p> <p><i>“ Rather than accepting the brief, like any good partner and agency, we try to truly understand what challenge is most pertinent to the business and how we can support them in their solution” [MD1]</i></p> <p><i>“ We work with agency planners. So, sometimes, we get quite a diluted version of a full brief” [PD5]</i></p>	<p>Supports principle that detailed media briefing remains the start point and guides the media strategy making process. However, the information exchange and knowledge sharing are not perfect</p>
<p>The need to understand the bigger picture and context</p>	<p><i>“ We try and work as closely as possible with our agency partners to really understand everything they’re looking at to get the bigger picture[PD5]</i></p> <p><i>“ We need to understand the nature of the product. We need to understand the nature of the audience before we start the planning” [PD7]</i></p> <p><i>“ it is actually about asking the right questions so that you can really help them frame what they are trying to achieve and then you can look at what is the appropriate media” [PD2]</i></p> <p><i>“ rather than accepting the brief, like any good partner and agency, we try to truly understand what challenge is most pertinent to the business and how we can support them in their solution” [MD1]</i></p>	<p>Media planners need to understand the business and communications context to be able to recommend appropriate solutions</p>

Table 7-4: Theme Summary - Importance of, but inadequacies in media briefing

These participant responses and themes, as summarised in table 7-4, demonstrate the importance of the media briefing and how the information exchanged remains the start point for developing the media strategy and plan. In fact, because of the importance of the media brief, this theme is developed further in Study 2 which sought to identify the types of data given within the briefing and the types of data that were wanted. This is explored in more detail in Chapter 8.

7.2.3 Guided by the Objectives

Reflecting the importance of the business perspective, all respondents stated that hierarchically linked objectives were the start point for the media strategy making process. Agencies and clients are working together to ensure that communication campaigns ultimately deliver the business and marketing goals.

“ Objectives, what you’re trying to do, have a huge determining factor on channels” [PD1]

“ Objectives guide strategy & measurement” [MD4]

“ The two biggest single things and I always say this and I am old enough not to say it but I do find it boring is, “What’s the objective and what’s the budget?” [PD2]

“ So basically you are led by the objective. The objectives can be different. You would look at the audience for that objective” [PD3]

Building on this, the media objectives are derived from the communication objectives, which therefore shape the media characteristics required and are a huge determinant of the types of channels to be used, as opposed to the historic perspective of just optimising media impacts:

“ obviously, the objectives, and what you’re trying to do, will have a huge determining factor on the channels that you use” [PD1]

“ [we start with] what are the communications objectives” [PD3]

“ Media Objectives are driven by what business wants” [PD7]

So, the objectives are key and for senior Media Strategists those objectives are related back to business problems.

“ .. the first thing is to really understand the brief and obviously understand the bigger picture: the world that the client’s in; the challenges they’ve got; how they use other channels. A key part in that will be understanding who their audience is. So, that’s normally a starting point, and we will then map that to our understanding and our insight into ... people - what they’re doing, what they’re thinking, what they’re feeling - in order to match up the media opportunities with the objectives of the activity” [PD5].

The importance of hierarchically linked objectives was highlighted within the literature, particularly within the core media planning textbooks that offer an overview of the media planning process (Barban *et al.* 1988, 1993, Donnelly 1996, Young 2014, Katz 2019). However, there was also a lot of debate within the most recent literature around the nature and priorities of objectives, particularly in relation to the variations between activation and brand activity (Binet and Field 2013, 2017). As evidenced by the participants in Table 7-5, clients can be very prescriptive about their direct response goals, establishing a range of guiding key performance indicators (KPIs) to help drive the required business.

One participant noted that the short-term business activation was particularly prevalent amongst newer internet pure-play clients who tended to draw a direct line between equity investment and sales:

“ They tend to be about micro-detail... [they say] I need to demonstrate that I’m optimising its return and you can bang on all you like to me about long-term effects, the long and short of it, brand equity, I don’t care. I’ve invested that and I want to get the most of it” [MD1]

Theme	Example statements	Implication
Hierarchically linked objectives	<i>“ Objectives guide strategy & measurement [MD4]</i> <i>“ Objectives, what you’re trying to do, have a huge determining factor on channels [PD1]</i> <i>“ But it all comes down to what is the objective? [PD2]</i> <i>“ So basically, you are led by the objective” [PD3]</i> <i>“ Communications Objectives shape media usage [PD3]</i> <i>“ Long and short-term considerations important [MD1]</i> <i>“ Behavioural and Attitudinal measures considered [MD1]</i> <i>“ Media Objectives driven by what business wants [PD7]</i>	Goals and Objectives remain imperative Hierarchically linked objectives frame what the marketing communications need to achieve for the business and the final outcomes required. Therefore, they underpin the media planning approach

Table 7-5: Theme Summary – Importance of hierarchically linked objectives

7.2.4 Quantifying the media objectives

The literature indicated that the media objectives are generally articulated in terms of quantified KPIs. These are often linked to models that have identified patterns and links between the weight of advertising media and changes recorded in ongoing audience tracking research or sales data (Cheong *et al.* 2010, Asdemir *et al.* 2012, Saura *et al.* 2017, Lautman and Pauwels 2018), as discussed in Chapter 5. Reach, activation and speed are considerations, but the language of delivering reach and frequency appears to have been replaced with more relevant measures of success:

“ I absolutely despise coverage & frequency, because every planner, even for a failed campaign, can go, ‘But I got 90% at 3.4” [PD3]

In addition, reflecting the need to understand the impact on the overarching business goals, effectiveness is measured by a wide range of KPIs throughout a campaign. These might include both long and short-term KPIs to help optimise the day-to-day campaign activity and drive the longer-term shifts in behaviour:

“ Media Objectives [are] driven by what business wants [PD7]

Theme	Example statements	Implication
Importance of KPIs to guide the process	<i>“ Reach, activation and speed are considerations [MD4]</i> <i>“ Reach & frequency are seen as poor way to measure effectiveness [PD3]</i> <i>“ They [KPIs] will be long and short-term. They will be connected .. as close to what the business wants to achieve as possible [MD1]</i>	Objectives and KPIs guide the media strategy development process and underpin the measurement aspects of the media planning. Less focus is now placed on optimising R&F of media impacts

Table 7-6: Theme Summary: KPIs - new measurement criteria for media strategy making

The rise of the KPI reflects the business orientation and the degree of disintermediation discussed before. It demonstrates that both effectiveness and efficiencies can be measured

in terms of actual costs to the business in generating sales, rather than just via correlations with measures such as awareness.

In relation to the research question, this theme, summarised in Table 7-6, gives support to the early stages of the media strategy process and the importance of objectives and KPIs in guiding the final media strategy.

7.2.5 Media efficiency versus audience first

The key theme that came through the early part of the interviews that planners need to understand and get to grips with who the customers and target audiences are. In particular, understanding behavioural issues around what motivates them, why they might or might not be interested in the product or service and what context they find themselves in before thinking about how which media channels can be used to reach them. This was advocated by both media planners and media owners:

“ It has flipped around I guess. Audience first rather than media first” [MD2]

“ So, you can’t just jump straight to the formats that might be the obvious ones for the audience, because those won’t necessarily be the route.” [PD5]

“ You’re moving towards a decoupling of the audience and the [media] environment” [MD1]

“ I think they should just start with the customer. Just to start with the audience, who it is, who they’re trying to talk to” [SD1]

“ So, the way you get to great work, and the way the media strategy is going to come together is to have a genuine understanding of the target audience but also the barriers to success. Why are they not buying this product? Why is a certain demographic underperforming? You have to crack that before you can crack the strategy. ... So, you need to have that insight into that audience on a number of levels. Why they are not buying the brand? What makes them buy the brand they want to? And also how you are going to get into their lives.” [PD4]

“ consumer and marketing insights are a huge part of the work these days and that, only having evaluated these, can the audience segments and communication objectives be established” [PD2]

This is a change in media strategy development which has historically been media led, with channels being identified, and schedules modelled and then appraised as to which combination would be most cost-efficient in delivering audience impacts as shown through much of the discussion on media modelling in Chapter 5.8. The participants were aware of the change and clearly expressed that the priority was no longer about just optimising the impacts delivery. Audience insight and targeting are seen to sit at the centre of creating the communication experience between the brand and its customers:

“ You’re moving towards a decoupling of the audience and the [media] environment. What I mean by that is we can now pull through first-party data from our clients to start informing media executions. That connects with the other thing that’s happening, a move from buying aggregated audiences to individuals” [MD1]

“ the media strategy come[s] together is to have a genuine understanding of the target audience but also the barriers to success” [PD4]

Theme	Example statements	Implication
Audiences are the starting point for the media strategy	<p><i>“ You’re moving towards a decoupling of the audience and the [media] environment? [MD1]</i></p> <p><i>“ media strategy comes together by having a genuine understanding of target audience but also barriers to success [PD4]</i></p> <p><i>“ shift from ‘advertising at’ to building experience [where] every touch point is going to define your brand [MD2]</i></p> <p><i>“ We’ve gone from people that hung ads in places [MD2]</i></p> <p><i>“ you can’t just jump straight to the formats” [PD5]</i></p>	Today’s media planners look at the details of the audience first, rather than media. Heavily data driven to deliver unique insights
Identifying that change has happened	<p><i>“ It has flipped around I guess. Audience first rather than media first” [MD2]</i></p> <p><i>“ a move from buying aggregated audiences to individuals” [MD1]</i></p>	Media planners are aware of the change that have taken place

Table 7-7: Theme Summary - Audience insight lead decisions, not media imperatives

This theme (see Table 7-7) corroborates the work of Young (2014) who notes that the communication planner must use research and insight to be able to understand the behaviour of the consumer and target audience so that they are able to plan communications that can influence the exchange.

7.2.6 Aiming for contextual relevance

Once the audience behaviours and insights have been unearthed, the media channels are explored. But again, there is more to consider than just their ability to deliver cost-efficient impacts. As seen in the literature reviewed in Chapter 5, the environments and context can have both a positive or negative effect on the planned advertising communication (Hatcher 2005, Douglas and Craig 2011, Stipp 2018). The media planners were very aware of this and identified that the type of channel used can play an important role and impact on the perception of the brand. Judging which context is most appropriate can be fuelled by research or intuition:

“ for me it’s about that environment, the context and then it comes about the messaging and what we’re saying to those people. That’s where your communication becomes more refined. It might be that you know that a particular time of day or day of week is better to talk to one than the other” [PD1]

“ we are driven by the phrase of ‘planning for context’ because we believe context in a digital world is the most powerful component that we can bring to a marketing strategy” [MD1]

“ biggest change in media, it is that move from reach to relevance... now we are working much more on relevance, hypertargeting, very data driven.” [MD2]

“ The conversation is starting to come back round again to creative – but in a different way and I genuinely believe it is all about relevance. Creative relevance to the individual. And that could just be context & time, and as simple as a well-placed tweet. It doesn’t have to have a big creative manifestation to it. Or could just be a very insightful piece of documentary, a piece of art if you like. It doesn’t matter. If it is relevant and meaningful people will engage with it and get out of it what they will” [MD2]

This reflects the academic literature and the studies that have looked to understand how the context and environment within which an advertisement is placed will have an impact on the reception or likability, or not, of the message (De Pelsmacker *et al.* 2004, Wang and

Calder 2006a, Kumar and Gupta 2016). Perceptions can be negative as well as positive, and the planners were aware of the possible negative consequences of causing irritation of unwanted irrelevant messaging. Building on that, relevance is seen as key to overcoming consumer irritation and ad blocking:

“define the audience, and when and where you have the opportunity, and permission, and relevance, to interact; [it’s a] shift from ‘advertising at’ to building experience [where] every touch point is going to define your brand” [MD2]

“Context & relevance key to overcoming consumer irritation and blocking [MD4]

Some of this can be delivered via programmatic targeting, which puts audiences at the centre, with algorithms directing messages to the audience at the right place and time:

“we’re using more social media data to understand what people are talking about. So, when a topic becomes relevant, we serve ads that taps into the sentiment of that area, location, or city” [PD5]

Theme	Example statements	Implication
The rise in importance of context and relevance to bridge the audience – media divide	<p><i>“driven by the phrase of ‘planning for context’ [MD1]</i></p> <p><i>“shift from ‘advertising at’ to building experience [MD2]</i></p> <p><i>“when and where you have the opportunity, and permission, and relevance to interact [MD2]</i></p> <p><i>“it’s about that environment, the context and then it comes about the messaging and what we’re saying to those people [PD1]</i></p> <p><i>“when a topic becomes relevant, we serve ads [PD5]</i></p> <p><i>“What you are trying to do, break old habits, create new ones ...really has a big effect on how you use media. [PD3]</i></p>	<p>Media planning is no longer about optimising low-cost impacts.</p> <p>The media strategy aims to incorporate the audience’s perspective of media and context to deliver the most relevant experience</p>

Table 7-8: Theme Summary – the reappearance of the importance of contextual relevance

This theme summarised in Table 7-8, indicates that context is well embedded into the language of media planning, often with the phrase ‘planning for context’ or even ‘context planning’, which corroborates the findings of the literature that context is having a resurgence as a way to replicate the effectiveness of digital cookie driven targeting, particularly now that privacy issues are challenging the use of third-party tracking cookies.

7.2.7 Use of heuristics and intuition

Chapter 5 explored the use of various heuristics in the development of the media strategy and plan. This included concepts of the hierarchy of effects which are used to explain the desired attitudinal changes that are anticipated along the consumer journeys and the pathway to purchase (Lavidge and Steiner 1961, White *et al.* 2004, Kimmel 2018). Supporting this it also reviewed the various one-stage and two stage communication theories and how they can be applied to aid understanding of how messaging and communication may work in different situations (Katz and Lazarsfeld 1955, Smith and Taylor 2004, Hilbert *et al.* 2016). In addition, the literature highlights that a number of economic theories and ‘laws’, such as the law of diminishing returns, have become embedded heuristics within the media planning consciousness. These support many media planning, communications and advertising theories and heuristics, such as concepts around share of voice, advertising intensiveness and advertising response functions that all strive to help establish and apportion the media budget

to best effect sales and market share (Jones 1990, Schroer 1990, Christensen and Hansen 2005, Binet and Field 2008e). Heuristics such as these provide short cuts to decision making and provide ‘rules of thumb’ that can be applied in certain situations and support a more intuitive interpretation of what approach to take.

Participants indicated that whilst some of that audience insights will be drawn from client data, in-house consumer-based research, and industry research, such as Touchpoints & TGI, to help inform the targeting and media consumption profile, experience and intuition are also seen as vital:

“ whilst those techniques [black-box optimisation] are useful, you still need to have that intelligent, insightful view of the audience, and ... a degree of intuition about when and where the right place is” [MD2]

“ [survey data] ... helps with direction,...[and] make a more insightful decision, but you still need to make that intuitive decision. Does that actually feel right for my brand, my audience at that point in time” [MD2].

“ think gut feeling intuition is quite a big part of it. I think if you’ve been in the industry a long time and you start to know these customers really well, you know, you have a good feel for what they’re looking for” [PD6]

“ first of all I think they need to just start with their own gut reaction of what they feel they know about that audience. Then ... go and try and break that model” [SD1]

Planners are aware of both the need for and problems of using heuristics and models, particularly in the face of so much data being available:

“ The degree of specialism helps but also hinders, so like all human beings I am very conscious of my rather heuristic tendencies to runcinate, “Oh I know the answer to that.” And sometimes not rely too heavily on the data” [PD2].

But heuristics, as summarised in Table 7-9, can be useful for the initial shape and cut of the inter-media planning decisions, for instance, knowing what may or may not be worth pursuing in the face of budget restrictions:

“ I would be a liar if I say, “I wasn’t heuristic”..., If I’ve got a bigger budget I will consider TV. If I have got a smaller budget, I will look at more niche, personal types of media be it social or direct. You start with the big picture stuff first and then you look for the data sources that will help you inform your decision making” [PD2].

“ if there was something reasonably new about what we were doing for a client, I would probably go with, “This is my belief, but let’s test.” I think there’s nothing wrong with testing” [PD3]

Theme	Example statements	Implication
Blending art and science and the use of heuristics Art or science	<p><i>“ ... a degree of intuition about when & where the right place is” (MD2)</i></p> <p><i>“ beings I am very conscious of my rather heuristic tendencies [PD2]</i></p> <p><i>“ I would probably go with, “This is my belief, but let’s test [PD3]</i></p> <p><i>“ I think gut feeling intuition is quite a big part of it” [PD6]</i></p>	Intuition remains important to the development of the media strategy indicating that even in a data driven environment, it is not all about data.

Table 7-9: Theme Summary – Intuition and heuristics remain an important aspect

7.2.8 Channel Selection

Media characteristics were discussed in Chapter 5 and many researchers offer generalised descriptions of the strengths and weaknesses of different media channels. These often include both physical attributes that impact on the message, such as aspects of media transportation and media richness. They also include practical production or planning issues such as reach, cost and production lead times. From a message point of view, creative preferences for specific formats or available creative assets can dictate which vehicle characteristics are required, but the channel selection appears to be more fluid now. For example, audio visual is no longer the preserve of broadcast TV or cinema, and can be equally effective via social media, Video on Demand (VoD), YouTube, etc., or even outdoor digital display boards. As participants stated:

“pigeonholes that existed four/five years ago aren’t as relevant now...[we can] mix those things up a little bit...with a well thought through communication argument” [PD1]

“AV is no longer preserve of broadcast TV & equally effective via social media, etc” [PD7]

In combination therefore, the goals of what needs to be communicated, to whom and by what techniques will shape the media strategy, and will guide the media to be used, rather than the cost efficiency of impact delivery, although there is still a perception that different media channels can imbue their own characteristics – which is an extension of the context and environment discussion.

As seen above, channel selection is driven primarily by the audience interaction but also by the context and characteristics of the channel itself. But there are a variety of ways to match the audience to the final channels to be used:

“Sometimes when we plan we will go with a very audience centric recommendation, and something that we build the channel around audience behaviour and lifestyle. So that’s one way of deciding on channels” [PD1]

“You have to find other ways of identifying that audience and looking at their media consumption and behaviours” [PD2]

TGI and Touchpoints were listed by all participants as being a source of survey data that can link audience groups with media consumptions, with Touchpoints tracking media consumption diaries over a 24-hour period. Some planners also outlined their proprietary tools that can be used to help with the matching process.

“That’s our XX system, ... [which] we’ve augmented that with other second-party data sources ... and things like that” [MD1]

Theme	Example statements	Implication
More fluid channel selection	<p><i>“pigeonholes that existed four/five years ago aren’t as relevant now” [PD1]</i></p> <p><i>“AV is no longer preserve of broadcast TV” [PD7]</i></p> <p><i>“the type of channel you’re on can have a huge effect on your perception of a brand [PD3]</i></p>	Formats & creative assets may dictate vehicle characteristics but channel selection more fluid

Table 7-10: Theme Summary – changing approach to channel selection

7.2.9 Using data to inform the planning

Media planning uses data from a wide range of sources, including the media owner's data, social media listening data, and client metrics and analytics data around ongoing activity, previous campaigns and clients' owned media.

“working very closely with the [data] team, at the moment, on data within our planning and how we can get much smarter at that, and use a lot of what we call the back-end data” [PD1]

“The more interesting stuff is blending data from other sources, whether customer data, third party data, meshing together different sources to try and understand our audience. Look alike audiences is huge. [...] the way in which they read the data and orchestrate an ad campaign between different data and different times would have a different effect and that has a value” [MD2]

Client data can be a useful source of insight and measurement. However, the current study shows that clients were not always forthcoming with the data that agencies might expect to receive. Participants proposed a variety of reasons, including the client being unable, unwilling or unprepared to give the agency the information including data accessibility and confidentiality issues. It was noted that clients were sometimes reticent to share customer data and that techniques needed to be developed to enable such data to be anonymised and generalised. This aspect of reluctance to share data was elaborated upon by the participants:

“clients that we work with might have the data within the business, but they don't necessarily have that 'one customer view' that is easily transmittable” [PD2]

“So, one of the things I always say is, “Well look even if you can't share me the name and age, give me their household stuff. At least give me that” [PD2]

“Whether it is different because you are not being given the data and interpreting the data in a particular way. Which is maybe the competitive advantage that one media agency would have over another” [MD2]

Data has great potential competitive advantage, both within the planning and the implementation. Data from past campaigns can provide benchmarks and correlations that can help shape future activity. It can indicate channels or creative messaging that is working more efficiently or more effectively, allowing for campaigns to be optimised accordingly.

7.2.10 Data modelling and optimisation

To support this, many 'black-box' systems have been devised over the last few decades to help media planners optimise the media scheduling task. However, respondents were clear that this type of impact optimisation was not central to the media strategy making process. The craft of the media strategist was noted by a number of interviewees along with the need for fresh thinking and insightful interpretation of the available data, using their intuition and experience to ensure that every media plan does not end up looking the same. One participant explained that black-box thinking carried a serious risk of homogeneity, because most of the systems use the same media owner and industry data.

“For me, planning is not just the tool, it's the thinking as well. ... clients are buying your expertise. They're not buying black boxes” [PD3]

“The early interface has to be bespoke” [PD3]

“ Our [system] is built around a large survey, ...[But] it’s just data. The craft of the planner should help them make the decision” [MD1]

“ we can get much smarter...we use a lot of what we call the back-end data...to inspire & inform creativity & planning” [PD1]

“ We use econometric modelling for some larger clients [PD1]

“ But like all of these tools it is indicative and you have to use a mixture of both what the data tells you but also what experience tells you” [PD2]

The use of black box solutions to test out what combinations of media may deliver in terms of effectiveness and efficiency remains important in this area where there is so much data to consider. However, the media strategy is seen to sit above this and needs to consider the creation of audience interaction and customer experiences to drive competitive cut through for the client (see Table 7-11). This reinforces the fact that there is now a clear separation between the media strategy and optimisation of the implementation and execution (Barker 2007a, Young 2014).

Theme	Example statements	Implication
Blending data and black box optimisation with art and intuition	<p><i>“ The early interface has to be bespoke [PD3]</i></p> <p><i>“ planning is not just the tool, it’s the thinking as well. ... clients are buying your expertise. They’re not buying black boxes [PD3]</i></p> <p><i>“ The craft of the planner should help them make the decision [MD1]</i></p> <p><i>“ The [system] is in place but I think gut feeling intuition is quite a big part of it [PD6]</i></p> <p><i>“ We use econometric modelling for some larger clients [PD1]</i></p>	Media planners reject pure black box optimisation suggesting insight should shape media strategy and they need to put their own thinking on the front end

Table 7-11: Theme Summary - Modelling and Optimisation

Overall this reflects the changes in process noted through the literature, which suggests that media decision making had moved on and that 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, something that Sudassy (2012) believed was fundamentally different to simply accumulating reach and exposure through mass media.

7.2.11 Iteration in activation planning

In addition to the requirement for expertise, intuition and thinking, the participants highlighted how much less prescriptive their strategies are now. This is driven by the rapidly changing environment, where agility and speed are seen as important attributes for the campaign:

“ Speed, rate & pace of change [is]unprecedented... Operating on the edge of chaos” [MD1]

“ look through any client’s annual report, “Agility, speed, are we moving fast enough [MD1]

“ Agility & speed important” [PD3]

Optimisation is achieved at the implementational stage. Iteration and optimisation come together to update the activation plan, sometimes on a daily basis, particularly when using programmatic techniques to buy and distribute the media campaign assets.

“ So ... something goes out, results coming through, instead of much forward planning it is much more reactive on the basis of the last thing that happened ... forward planning is not as forward as it used to be...on a weekly basis, but often even more frequently than that” [MD4]

“ So I think the theory is the same. But is it just more iterations of it. So you are constantly learning, planning and learning and feeding back. Constantly learning for the next. I genuine I think it is the same approach but just faster and smaller as well, in that it is not about creating one big thing which is risky” [MD2]

Theme	Example statements	Implication
Scheduling is less prescriptive. Optimisation occurs throughout the implementation	<p><i>“ Forward planning is now as forward as it used to be” [MD4]</i></p> <p><i>“ it is not about creating one big thing which is risky” [MD2]</i></p> <p><i>“ Just more iterations of it. So you are constantly learning, planning and learning and feeding back” [MD2]</i></p> <p><i>“ So, things change so quickly between when we plan something and when it actually happens” [PD3]</i></p> <p><i>“ when a topic becomes relevant, we serve ads that taps into sentiment of that area, location, or city [PD5]</i></p> <p><i>“ Programmatic targeting puts audiences at the centre, with algorithms directing messages to audience at right place & time [PD8]</i></p> <p><i>“ Optimisation is undertaken on a real-time basis, ...clickstream data evaluated rapidly and selections amended to improve current activity [MD4]</i></p>	Media planning is less prescriptive than seen in the past. It is not about modelling a solution. It is now optimised at the implementational stage, often in real-time with real feedback.

Table 7-12: Theme Summary - Optimisation through rapid iteration

7.2.12 Budget allocation

Budgeting is an imprecise science as seen through the literature with many different methods for establishing how much should be spent. Research into share of voice and share of market identified that spend can lead to brand growth, but that the short to medium term elasticity is low, and therefore diminishing returns are likely to kick in before large gains are made (Jones 1990, Schroer 1990, Brue 1993, Mesak and Means 1998), as discussed in Chapter 5. Where direct response and activation is the objective, the correlation is clearer, with the budget being linked to the cost of acquisition and the target number of acquisitions to be made (Lara *et al.* 2008, Asdemir *et al.* 2012, Stricker *et al.* 2017).

Considering this aspect, participants noted that whether planning brand or direct response campaigns, budgets are generally linked to a range of metrics to improve accountability:

“ We try and link that ROI and that return on investment so they can almost do budget setting” [PD1]

“ [if] we know our return on investment is this...We know that in order to get that return on investment we need to spend x. So [we] try and almost create a business funnel. It’s very complicated and it’s very hard to do with absolute certainty but that’s more how comms planning is moving, because the challenges that we get faced now are often less communication channels and more business challenges” [PD1]

There are many debates within the literature about the need for the media planner to identify the required media mix, plan the budget allocation and ensure that scheduling options are reviewed and evaluated to arrive at the optimal delivery (Calantone and de Brentani-

Todorovic 1981, Pasadeos *et al.* 1997, Mesak and Means 1998, Cheong and Kim 2012). Even within the most recent studies to operationalise analytic hierarchy networks to support the media planning task (see section 5.8.2), budget allocation appears to be a major objective (Dyer *et al.* 1992, Saaty and Vargas 2001, Lin and Hsu 2003, Tektas and Alakavuk 2003, Coulter and Sarkis 2005, 2006). However, the combination of a turbulent digital media environment and real time trading means that media pricing is volatile, participants identify that it is not realistic to apportion budgets to channels and suppliers in advance:

“ how much budget we give them is an output not an input. That’s the difference. You can look at our plans and we just so happened to have spent 3% in TV or 90% in TV, that depends on the activation plan. We don’t start there [just] because you used to” [MD1]

Building on this therefore, the research is suggesting that it is not possible to pre-optimize theoretical media impact delivery in the way that is described throughout most of the early literature. The strategy is a shape or vision of how things should come together, not a prescriptive, optimized budget allocation as in previous years:

“ gone are the days of these beautifully constructed strategies that are honed and refined within an inch of their life and then they’re calmly implemented” [MD1]

In this situation, innovation, learning and iteration are the strategy. The required objectives, audience, data and observations are at the centre, used to discern patterns and make the generalised recommendations, with swift updates to optimise in situ.

“ We can standardise practices & procedures around best practice but the rate & pace of change means the process itself is quite iterative.... work develop[ed] twelve months ago moved on because of what we’ve learned [MD1]

Young (2014, p. 28) described this as the brand media strategy, where the communications strategist plans the central communications creative platform, with the campaign architecture and concepts for amplification prior to activation. Looked at this way, the actual plan is emergent and inductive, guided by the architecture, but orchestrated in real-time to respond to the dynamic marketplace, interpret data and take advantage of changing opportunities as they arise. The old deductive process, with its rationally prescribed solution, modelled on theoretical impact data has changed.

As noted the media strategy remains a mixture of intuition, art and science, where the art ensures that the proposals reflect the specific brand, context, audience and communication goals, and allows for differentiation:

“ it’s a bit of art and a bit of science, and the audience thrown into the middle of those things” [MD3]

Theme	Example statements	Implication
Learning and Iteration underpin the media strategy recommendation	<p><i>“ the rate & pace of change means the process itself is quite iterative.... work develop[ed] twelve months ago moved on because of what we’ve learned [MD1]</i></p> <p><i>“ how much budget we give them is an output not an input. [MD1]</i></p> <p><i>“ So [we] try and almost create a business funnel. It’s very complicated and it’s very hard to do with absolute certainty but that’s more how comms planning is moving” [PD1]</i></p>	Media strategies and plans are not prescriptive or cast in stone. They are fluid visions of how to achieve the goals within the current parameters

Table 7-13: Theme Summary – more fluid approach to budget allocation

7.3: Overall Process Frameworks

A key objective of this research study is to identify if new approaches are emerging around strategy formation within advertising media planning, and as a result, be able to develop a media planning framework to guide strategy formation in the current complex environment.

Thinking of the planning function I would be interested to capture your view on the process that planners undertake. This section is supported with image artefacts		
Purpose: conceptualise the approach/process being described	Process diagrams – which would be most appropriate for a planning framework Which key pointers would you include on a framework? Here is a framework derived from previous research, how well does it match your practice? What would you change?	<i>Process summary</i> <i>Planning sequence</i> <i>Planning frameworks</i>
Purpose: MS&P approach in different language reflecting literature	Would you identify your plans as highly deliberated instructions that require implementation, or a guiding shape that is fluid and emergent?	<i>Strategy theory</i> <i>MS Approach</i>

Table 7-14: Example of questions used to identify process and framework elements

Supporting this, Chapter 2 outlined the planning process frameworks that are found in the literature (see section 2.5), with the individual aspects of the process steps explored in greater depth through Chapters 3 to 5.

The primary research undertaken here has shed light on those various aspects to identify what the current approaches are and how they inform or impact upon the overall process. The final stage of the in-depth interview was therefore to look at the overarching process frameworks themselves and gain the input from the participants as to how the process might be structured to best represent the approach that they currently undertake.

To guide this, participants were asked to think about how they would describe the media strategy and planning decision making and presented with a number of artifacts to help visualise that process.

As described in Chapter 6, the interviewees were shown a variety of artefacts to help them explain the process. These included several standard shapes such as squares and triangles, but also shapes that had been used within the media planning literature such as linear arrows, funnels, circles and cycles. Interviewees were asked to identify which shape was most appropriate in demonstrating what the media strategy and planning process was to them, and then shown some of the media planning frameworks from the literature.

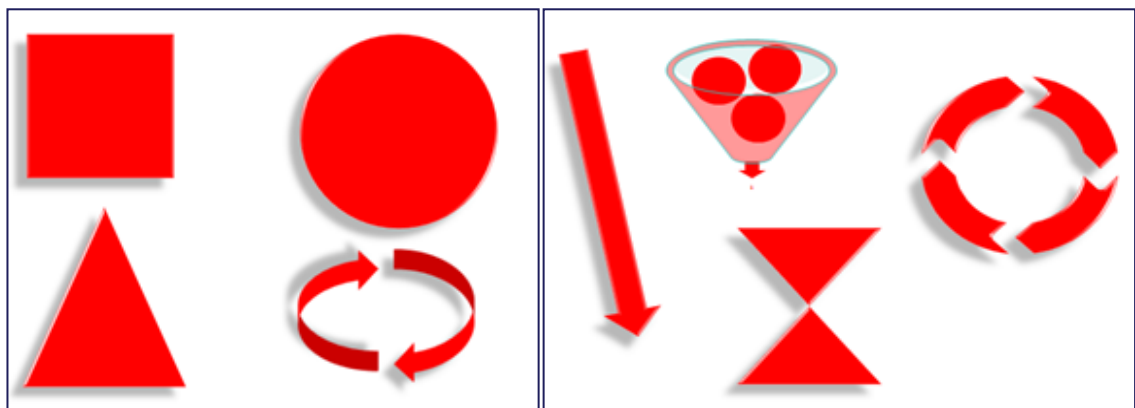


Figure 7-4: Outline artefacts used to consider the media planning process

Participants noted that the process varies, particularly between brand and direct response or activation campaigns, but was still underpinned by what they saw as the traditional ways of planning. They sought to explain the ways in which different elements might have changed over time and how their processes were being changed by the digital environment.

The most common shapes associated with the media strategy process was the continuous cycle, either of two or four arrows. This reflects the models of Barban *et al* (1993) and Barker (2007) which were discussed. However, all participants felt that there were omissions in both frameworks. The addition of a short cut arrow down the centre was the most popular addition. Participants explained that this helped to reflect the direct and repeated step between evaluation and replanning to iterate and optimise the activity.

Alternatives were discussed because many interviewees expressed frustration that the shapes were all quite poor at differentiating between the importance of the initial insight and analysis stage versus the time dedicated to the implementation, which often revolves around multiple iterations to replan and optimise the campaign as new data from interactions with the audience is made available.

The figure of eight, infinity loop or the earths analemma (see Figure 7-5) were suggested to reflect the iterative nature of the ongoing optimisation and replanning.

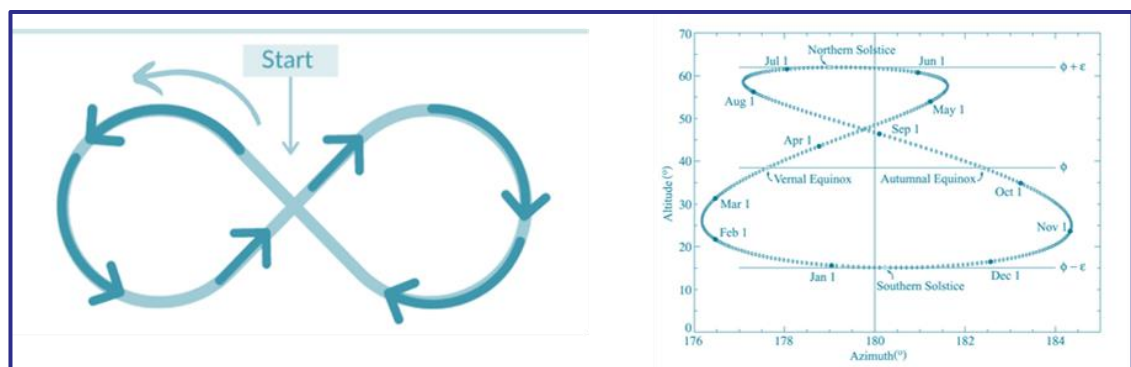


Figure 7-5: Examples of infinity loops and the earths Analemma

These shapes can be more flexible to show variations in the emphasis placed on different sections.

“ I think it is the infinity curve. [...] if you think about Virgin Media it is the infinity curve. Because I think that good metrics and good media measurements should come back on itself [...] because what you learn should feedback into your choices” [PD3]

“ The infinity loop ... that is part of our framework [MD1]

“ What we’re moving to is something that’s more like that figure of eight where you’re looping back and it’s not just the way things happen. You’d start planning. You’d learn. You’d come back again.[...] virtually as a circle. It’s a start and finish” [PD5]

“ The point is the business objective sits here, distil the challenge, audience, and strategy as we then go in to execution, idea and design and build and it comes back. Both of these can be improved by the activity. [...] Definitely the principle that what you learn here can define and reshape people, for instance, and, to a degree, strategy. I like the fact that you’ve got two circuits going on.” [MD1]

However, there were differences in where the emphasis should be placed. Some felt that the initial insight and strategy making stage needed to be larger because the consumer and

marketing insights take considerable time and audience segments, and communications objectives can only be established once this aspect has been completed:

“ the initial analysis and summative evaluation stage needed to be given more emphasis” [MD1]

“ consumer and marketing insights are a huge part of the work these days and only having evaluated these, can the audience segments and communication objectives be established” [PD2]

“ Your first brief is sometimes very top line. Then, you get something more detailed, and it will go backwards and forwards, backwards and forwards. So, you’ll do a lot of work here” [PD5]

“ It goes backwards and forwards, backwards and forwards at certain points. But there is certain legwork, for want of a better expression, that you do on the journey of the consumer, the objectives, and then the actual solution evolves and evolves and evolves” [PD5]

In contrast, others suggested that the process needed to show that the second implementational stage is the bigger part of the actual campaign delivery:

“ the overarching client objectives & underpinning audience segmentation, etc., [are] reviewed less often, maybe once a quarterly or every six months” [PD1]

One participant saw the second stage of implementation and iteration as being like ‘a snail’ or ‘spiral’, with the micro actions of the implementation happening faster and faster on smaller and more specific refinements over time, in cycles of learning, planning and feeding back all leading to make up the final effort:

“ arr, the snail!” [MD2] ...

“ So, I think the theory is the same, but it is just more iteration. So you are constantly learning, planning and learning and feeding back. Constantly learning what next. I genuinely think it is the same approach but just faster and smaller [...]. It’s not about creating one big thing which is risky [...] reactions to the small things then start to inform the big stuff” [MD2]

“ Very like it but the spiral is getting smaller...” [MD4]

Many participants indicated that they have develop their own agency processes, underlining the fact that agencies have their own organisational culture and like to have their own processes that they can point to as being ‘their way’ and why it will be an advantage for their clients. But a common theme was that these processes are ‘looser’ than they might have been in the past, making them more flexible to changes.

“ Whilst we are big fans of process, our frameworks tend to be looser now to make them more future proof and reflect changing opportunities [MD1]

“ it’s an iterative process fused in direct response planning using data for continual refinement, usually weekly but often in real-time” [PD8]

Overall, there were suggestions that a new model should be flexible enough to represent the variations in weighting that was placed on the different stages of the formation of the media strategy and the implementational planning stage:

- First that undertaken for significant annual planning review in tandem with development of annual marketing plan.
- Second the tactical replanning undertaken throughout the year incorporating & responding to metrics and measurements captured.

Participants agreed that the current sequential models needed to be revised to incorporate the more iterative approach that is being applied, with the consensus that some form of dividing arrow that navigated the planner from the analysis stage back to the scheduling elements was vital.

As noted above, participants identified that the circular nature or continuum was the most appropriate model, with those proposed by Barban *et al* (1993) and Barker (2007) being the most appropriate for updating. However, a mechanic was required to demonstrate the iteration identified within the executional intra media planning and implementation stage.

The model developed by Barker (2007) was selected as being the most suitable for updating in terms of recency, familiarity, copyright and the basis of the original question as to whether current models were still applicable.

The dissecting line attempts to emulate some of the fluidity found within the infinity loop or the concept of the snail. This is shown in Figure 7-6 below.

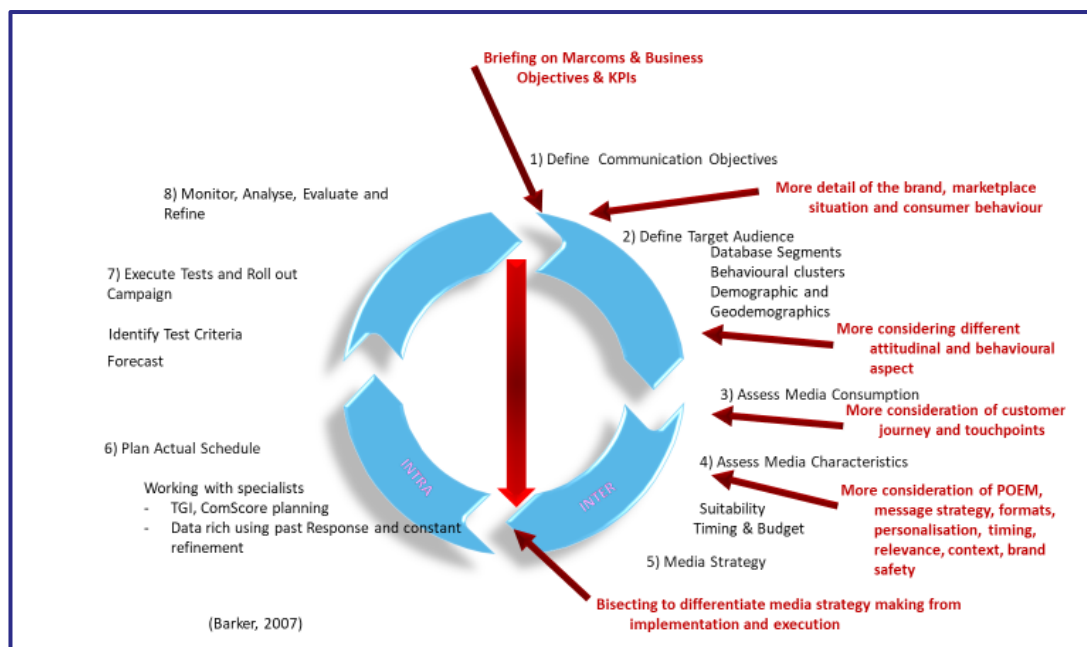


Figure 7-6: First iteration of inter-media planning process framework (adapted from Barker 2007)

In addition, many participants felt that the usefulness of the framework would be improved by offering more details of the individual steps.

Because of the importance placed on the media briefing many commented that this should be made explicit. Linked to this should be the aspect of understanding the hierarchically linked objectives, from business and marketing through to communication and media and the relevant supporting KPIs.

To complement this, the evolution of the situation and marketplace should be identified to help draw clients and agencies together in sharing data around not just the brand, products and services but also the audiences and the brand communications that they receive from the client and other competing players.

“ It’s really a combination of things. I think the brand will have a determining factor on how the brand should be behaving. It’s the audience will be the other factor. Then linking all those things back to what the objectives are, because obviously the objectives, and what you’re

trying to do, will have a huge determining factor on the channels that you use. So it's normally a combination of those three things, a bit of art and a bit of science, and the audience thrown into the middle of those things" [PD1].

Building on this, defining the audience should be the next step. However, more considerations can be added to reflect the fact that there are now multiple methods for targeting across both attitudinal and behavioural aspects.

The media strategists craft is then acknowledged but with a more explicit link between the audience and how they interact with media and touchpoints along the customer journey, reflecting the concepts of the hierarchy of effects that underpins a lot of behavioural psychology.

"Yeah, 'meaning' is usually the word I would use on that, so that – have we understood our own brand story, our own meaning – our own purpose. Why should anyone care, what's the connections with that audience, and therefore audience/media selection then becomes how do we deliver that meaning, that story that purpose that's the right time in the customer journey" [MD2]

The key characteristics of the media also need to be considered to ensure that they reflect formats or dimensions required by the message strategy, but also in terms of the ability to achieve the targeting goals. Aspects such as personalisation, geographic or timing are identified here, along with context which is returning as a key consideration in the face of brand safety issues. These aspects all contribute to the setting of the media strategy:

"In essence, that is identifying core audiences or identifying a business problem, translating that into a marketing problem, using insight to derive a strategy, which is then implemented and executed using media, both paid, owned and earned" [MD1]

In relation to the implementational aspects, the participants suggested expanding this to include developing individual schedule detailed and test activity to formulate the agency or client negotiations. However, the implementation stage leads with the execution and monitoring of tests activity which should be evaluated against the guiding KPIs to ensure that each step is leading the campaign in the right directions.

"I think when I first started all those years ago, the role of a media planning and buying agency was to identify where people were most receptive to a message and buy that space or time as effectively as possible. Digital has fundamentally changed that in the sense that media has become more searchable, sociable, transactional, and I'll come back to that, and increasingly measurable" [MD1]

These evaluations are fed back into the optimisation and replanning phase which produces the updated plans in a series of iterations as suggested in Figure 7-7 overleaf.

"Decisions have been made on a very much more last-minute basis. So, in other word, something goes out, results coming through, instead of much forward planning it is much more reactive on the basis of the last thing that happened. So forward planning is not as forward as it used to be" [MD4]

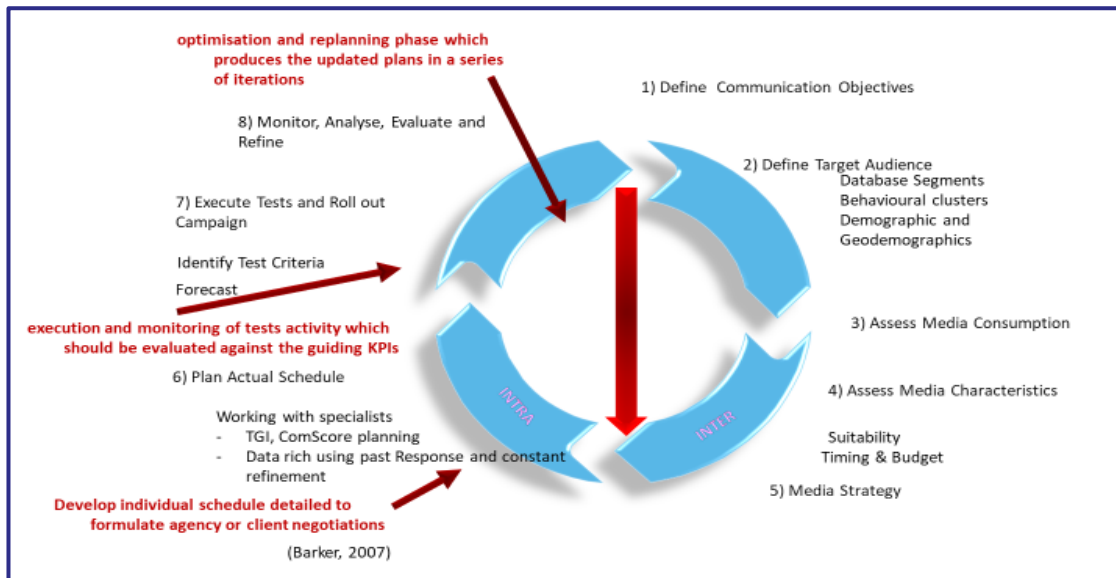


Figure 7-7: Second iteration of implementational aspects of planning process (adapted from Barker 2007)

The final delivered plan for the campaign is therefore only seen once the campaign has ended. It might change from the initial vision as it progresses, building on new data as it is received. It will follow the vision in terms of the types of channels to be used and how to use them but will be responsive to changes in the environment and consumer interactions as they arise.

“ how much budget we give them is an output not an input. That’s the difference. You can look at our plans and we just so happened to have spent 3% in TV or 90% in TV, that depends on the activation plan. We don’t start there [just] because you used to” [MD1]

As a result of all of these comments from the participants a final suggestion is made as to how the media planning process framework could be depicted at the current time as shown in Figure 7-8 below.

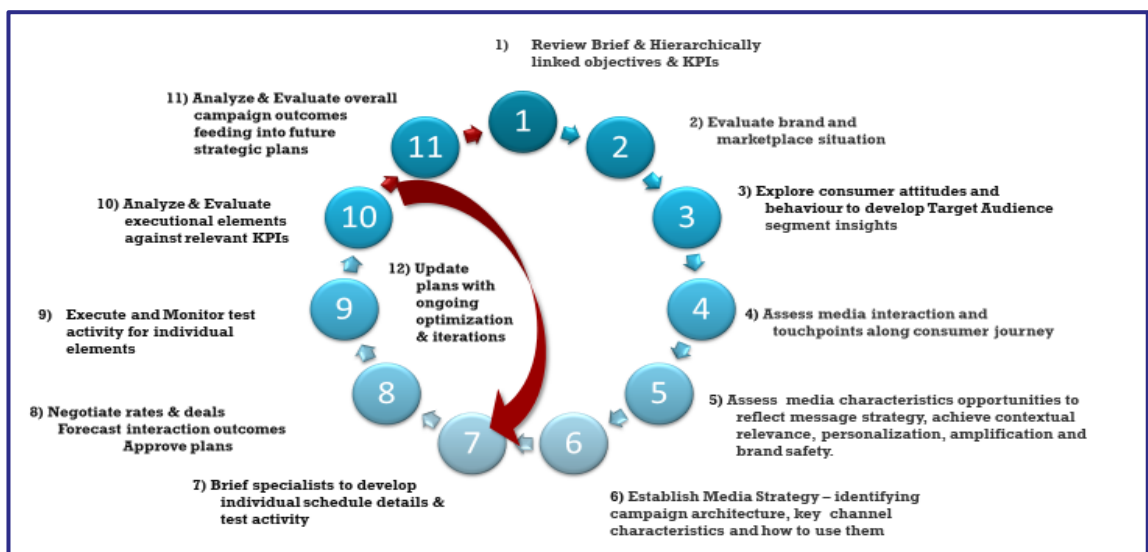


Figure 7-8: Final iteration media strategy and planning process framework (adapted from Barker 2007)

The key themes from the participant interviews are integrated to attempt to form a comprehensive but clear framework. Attempts at modelling this around an infinity loop were made but as noted by some of the participants, this fails to show the iteration and optimisation clearly, and suggests that the flow goes directly back into reassessing the higher-level strategy issues. They were all agreed that this was not the case.

The simple model offered in Figure 7-8 (see p. 172) therefore attempts to reflect the division between the two aspects of media planning, separating the strategy making stage from the more iterative implementational aspects that seek to build on feedback and real time data to optimise the execution during the campaign. This is a big change from former models that would imply that feedback and data needed to be fed back into the next campaign.

The framework is a guide to the aspects that need to be considered rather than a prescriptive set of steps. It establishes the strategy as a specific outcome of the process.

As noted by MD1, *“our frameworks tend to be looser now to make them more future-proof and to reflect a changing opportunity”*

Building on this Study 2 explored the aspects of media briefing in greater depth and are written up in the next chapter, Chapter 8.

Chapter 8: Study 2 Media Planners Survey Findings

This chapter details the findings from the data obtained through the media planners survey, the objective of which is to identify what data and information media planners use and have access to when undertaking the media planning task. This study builds on the work undertaken by Cowan and Abratt (1999) and Arul (2012, 2013) which established that fourteen key information categories of data were used, as identified in Figure 8-1 below, with sixty-eight underpinning variables (See Appendix 12-4, p.228).

Budget Information	Media Information
Communications Planning Information	Objectives Information
Competitive Information	Product & Brand Information
Creative Information	Reach & Frequency Information
Consumer Behaviour Information	Sales Information
Historic Information	Segmentation & Target Information
Market Size Information	Timing Information

Figure 8-1: Key categories of data used in media planning and buying (Cowan & Abratt, 1999)

The data collection was guided by RQ3: What types of data do media planners currently use to formulate the media strategy and plan? Supporting this, two sub-objectives were articulated through the survey to delve into the detail of what data they may want compared to what they might actually use:

- Q2: Please list the data and information types that you are given and have access to use for the development of your media plans
- Q3: Please list the data and information types that you would like to have access to for the development of your media plans

8.1: Primary observations from the data

Once the data was uploaded to Nvivo, it was initially evaluated via the word cloud feature to help visualise the contents and get a general understanding of the terms used and word density patterns.

The respondent data from Q2 shows that *'objectives, budgets, audience, creative and timing'* are cited frequently, as shown in Figures 8-2 overleaf. It is also the first indication that new information terms are being listed, such as KPIs and assets.

However, when looking at the data from Q3, as displayed in Figure 8-3 overleaf, the terms that stand out are *'data, insight, previous results, and analytics'*. This reflects the move towards digital planning and accountability, but it has to be remembered that this question asks 'what data would they like to have access to', indicating that a lot of respondents would like to use data and insight but are not actually able to get hold of it.

There were also a surprising number of references to information and data that could be considered essential, including references to objectives and creative messaging.

indicating the data categories that are of greater or lesser importance at a generalised level.

- Secondly, the inter-category word usage can be analysed to establish the commonality or variations in information descriptions used.
- Finally, because the coding was built up from the existing literature, it is possible to draw comparisons and identify differences with the previous research.

8.2.1 Question 2 data categorisation

As outlined in Chapter 6, the coding identified sixteen categories of data that media planners and marketers state they use when formulating the media plan (see section 6.5.7 – data analysis). This included the original 14 identified by Cowan & Abratt (1999) plus two new categories, ‘Owned Media’ and ‘Project Management’. In addition, one category was renamed, with the original ‘Reach and Frequency’ category being changed to ‘KPIs’.

Using the count of references to each node, it is possible to calculate what percentage of the overall respondent base mentioned a particular category, and ranking information sources accordingly. This facilitates a number of comparisons, as shown in Table 8-1.

Information Sources	Avg of Mkt	Rank	Avg for MP	Rank	Avg for All	Rank
Budget Information	90%	1	79%	1	82%	1
Segmentation and Target Market	65%	4	78%	2	75%	2
Information concerning objectives	70%	3	74%	3	73%	3
KPIs	50%	6	56%	6	55%	4
Timing Information	35%	11	59%	4	54%	5
Creative information	25%	13	59%	5	52%	6
Historical information	60%	5	38%	9	43%	7
Media information	20%	16	48%	7	42%	8
Market size information	45%	7	40%	8	41%	9
Product/Brand information	75%	2	26%	12	37%	10
Owned Media	40%	8	33%	11	34%	11
Consumer behaviour information	25%	14	34%	10	32%	12
Communication Planning & Strategy	40%	9	25%	13	28%	13
Project Management	40%	10	16%	14	22%	14
Competitive information	30%	12	16%	15	19%	15
Sales information	25%	15	12%	16	15%	16

(All Respondent Base 93 = 100)

Table 8-1: Q2 ‘Information sources used’ coded by incidents of mentions

The most numerous mentions were of Budget, Segmentation and Target Market, Objectives, and KPIs. Looking at the separate data for all Media Planners (MP) and all Marketers (Mkt), there were some clear differences, such as the Media Planners ranking Timing Information, Creative Information and Media Information quite highly compared to Marketers. Marketers put more emphasis on Product and Brand information and Market size information.

Looking at the data from the previous research by Cowan & Abratt (1999), as shown in Table 8-2 overleaf, it is seen that Budgeting, Targeting, Objectives, and Reach & Frequency information were ranked as the most important. However, there are some interesting points of parity and difference to be seen between the two sets of data – although it must be remembered that the questions were not asked in the same way and that the objectives of the studies were different. The current study was asking what data/information respondents were

given or had access to. That does not mean that something that they did not have access to was not a priority, hence the second part of the questionnaire.

Information Sources	Avg of Mkt Mean	Rank	Avg of MP Mean	Rank	Avg of Total Mean	Rank
Segmentation and Target Market	9.60	2	9.33	1	9.47	1
Information concerning objectives	9.91	1	8.49	4	9.21	2
Reach and frequency information	8.45	7	8.94	2	8.56	3
Budget information	8.50	5	8.58	3	8.54	4
Consumer behaviour information	8.42	8	7.30	6	7.86	5
Sales information	8.47	6	7.17	7	7.83	6
Timing information	8.07	11	6.98	8	7.53	7
Media information	8.24	10	6.71	9	7.41	8
Creative information	7.31	13	7.33	5	7.32	9
Competitive information	8.39	9	5.98	11	7.21	10
Communication Planning & Strategy	8.58	3	5.51	12	7.07	11
Market size information	8.55	4	5.40	13	7.00	12
Historical information	7.32	12	6.00	10	6.67	13
Product/Brand information	6.22	14	4.37	14	5.31	14
Average	8.38		7.07		7.71	

Table 8-2: Priorities given to different information (Cowan & Abratt, 1999, p.44)

When comparing across the two studies, there are notable similarities, such as the importance of information relating to Targeting, Objectives, Reach/KPIs and Budgets. However, a key difference seems to be around the increase in priority given to Historical information and a reduction in interest in Sales Information, and of course, the identification of new data sources such as Owned Media and Project Management Information. This comparison is outlined more clearly in Table 8-3 below.

Information Sources	Q2 Weighted mentions	Rank	C&A Avg Mean (p.44)	Rank
Budget information	82%	1	8.54	4
Segmentation and Target Market	75%	2	9.47	1
Information concerning objectives	73%	3	9.21	2
KPIs (aka reach & frequency)	55%	4	8.56	3
Timing information	54%	5	7.53	7
Creative information	52%	6	7.32	9
Historic information	43%	7	6.67	13
Media information	42%	8	7.41	8
Market size information	41%	9	7	12
Product/Brand information	37%	10	5.31	14
NEW Owned Media Information	34%	11		
Consumer behaviour information	32%	12	7.86	5
Communication Planning & Strategy	28%	13	7.07	11
NEW Project Management Details	22%	14		
Competitive information	19%	15	7.21	10
Sales information	15%	16	7.83	6

Table 8-3: Changing priorities over 20 years (adapted from Cowan & Abratt 1999 p. 44)

This might be because planners are now more involved in the business focus and sales targets are often translated to KPIs to sit alongside the objectives, therefore this element is being embraced from a different perspective. In addition, a linguistic change was the presence of the phrase amongst current respondents of 'targets' to mean 'what the campaign has to deliver' rather than 'who to deliver against'. These semantic differences were discussed in Chapter 6 in relation to the units of assessment.

8.2.2 Question 3 data categorisation

Question 3 asked “Please list the data and information types that you would like to have access to for the development of your media plans”. This data was also transferred into a statistical view to understand the priorities outlined by the respondents.

As seen in Table 8.4 it shows that data related to Historic Performance, Consumer Behaviour and clients Owned Media are key priorities. Even when separated out into Media Planners and Marketers the results show the same general priorities.

In the case of Historic Information, given that both parties want the information, it would be interesting to find out why this data is not forthcoming, and where it can be obtained from. Similarly, Owned Media data was on both marketers and media planners wish lists. This should be something that the clients are able to provide but it may be that internal policies prevent this information being released from IT or operations teams to support the marketing function. As noted in the literature, owned customer data is now seen as an important competitive asset (Liebeskind 1996, Macnamara *et al.* 2016). Further research is required here.

Information Sources	Avg of Mkt	Rank	Avg for MP	Rank	Avg for All	Rank
Historical information	55%	1	40%	1	43%	1
Consumer behaviour information	40%	2	27%	3	30%	2
Owned Media	35%	3	27%	4	29%	3
Communication Planning & Strategy	15%	9	27%	5	25%	4
Creative information	5%	14	29%	2	24%	5
KPI	20%	7	23%	6	23%	6
Project Management	30%	4	21%	7	23%	7
Information concerning objectives	25%	5	21%	8	22%	8
Sales information	20%	8	15%	9	16%	9
Segmentation and Target Market	15%	12	15%	10	15%	10
Competitive information	20%	6	11%	12	13%	11
Media information	5%	15	12%	11	11%	12
Market size information	15%	10	8%	13	10%	13
Product/Brand information	15%	11	8%	14	10%	14
Budget Information	10%	13	3%	15	4%	15
Timing Information	5%	16	0%	16	1%	16
<i>(All Respondent Base 93 = 100)</i>						

Table 8-4: Q3 ‘Information sources wanted’ coded by incidents of mentions

In relation to consumer behaviour data, it indicates that it is a priority, but it appears that this information is not forthcoming in a format that is wanted by nearly a third of all respondents. However, some other elements need more interpretation as well, such as the low priority seen amongst marketers to Creative Information, Communication Planning and Strategy and Media Information. According to some of the verbatims offered in Q4, marketers expected this information to come from the media and creative teams, rather from the briefing. Therefore, it was an outcome of the briefing process. This makes sense and reflects the changes in roles and responsibilities outlined within the literature, where media planners have been elevated from schedulers and buyers to experts who are part of the strategic management team to deliver the marketing and business goals.

Overall, the data corroborates the findings from the in-depth interviews undertaken for Study 1, where participants stated that briefing is very important but that clients are not giving

them all of the data that would help to make better decisions and apply learning from the past to the future activity.

8.2.3 Comparing priorities

Finally, it is noteworthy to compare the priorities identified between Q2 and Q3. When looking at all respondent data there is a clear divergence at the front end, as shown in Figure 8-4.

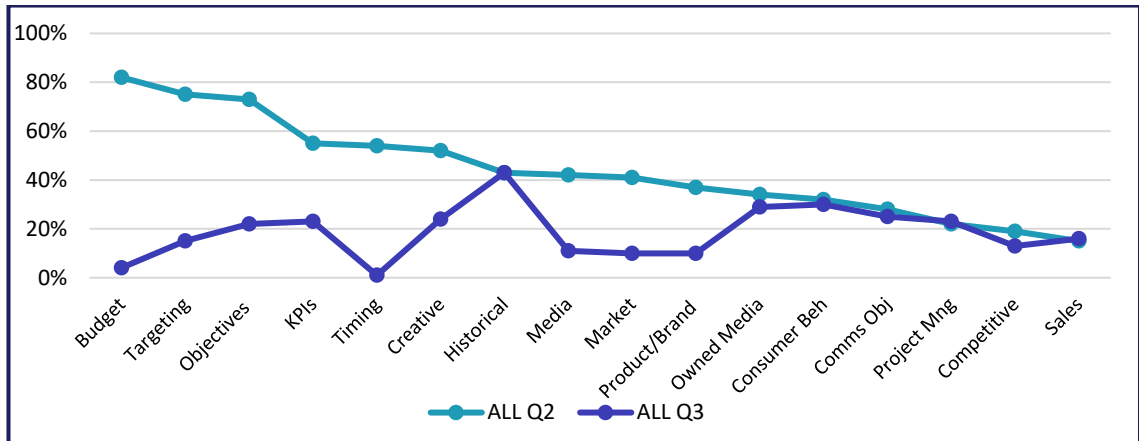


Figure 8-4: Comparison of priorities between Q2 and Q3 for all respondents

With over 80% of respondents to Q2 saying they are getting ‘Budget information’ it is hardly surprising that there is little mention of it in Q3. The demand for historic data does stand out as an anomaly, as being data that is received by many but also wanted by an equal number of respondents. Equally there is data such as ‘Sales information’ that very few respondents say they are using and very few who claim to want it.

When comparing the media planner data, it indicates that they use budgets, targeting, objectives, timing, creative and KPI information when formulating the plan (see Figure 8-5).

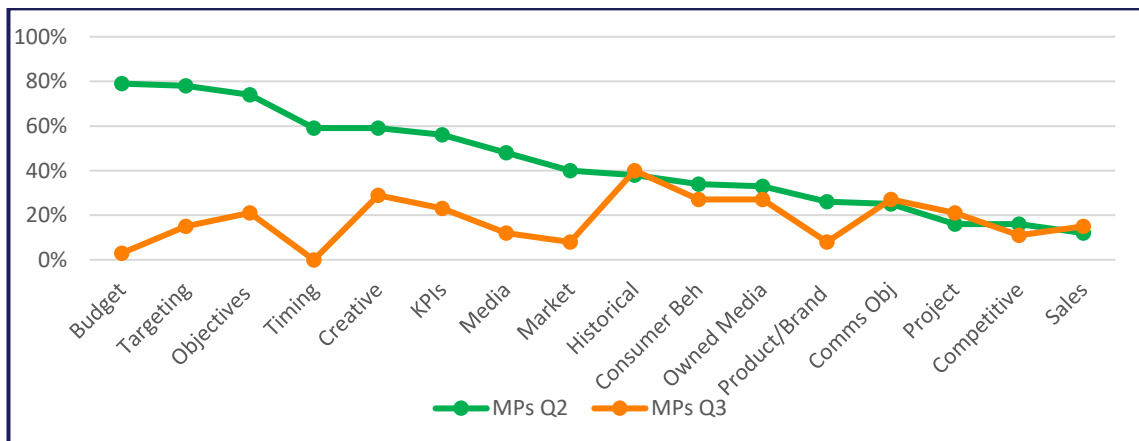


Figure 8-5: Comparison of Media Planner priorities between Q2 and Q3

It is interesting to see that some planners are stating that they are not receiving information related to Objectives or KPIs, others were noting the absence of Creative Information or Consumer Behaviour data. In addition, almost equal numbers of planners were using owned media data as were wanting it. The mentions of Media Information were perhaps lower than

anticipated as it is undoubtedly within the media planning process, but maybe some respondents thought this was obvious. This would be interesting to research further.

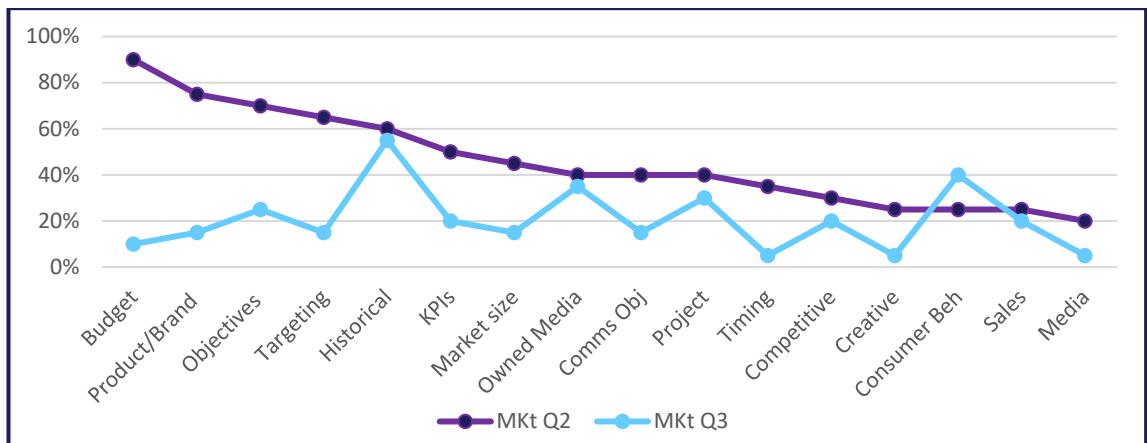


Figure 8-6: Comparison of Marketers priorities between Q2 and Q3

Marketers have access to, and use, more Product and Brand Information, but seemed to share the frustrations of media planners at the lack of access to Historic Information and campaign data (See Figure 8-6). They also demonstrate a decreased interest in pure sales data and almost no interest in media data.

8.3: Detailed review of each briefing category

As observed above, most respondents stated they received information relating to ‘Budgets’, ‘Segmentation & Targeting’, ‘Objectives’, KPIs and ‘Timing’, suggesting these are a priority. As would be expected, these topics were cited less in the ‘information wanted’ answers, as detailed above, however, there were still high numbers of respondents stating that they were not receiving the data. Looking at each category independently it is interesting to see what data is being received and what is not. This is also helpful in identifying what might be the new information needs.

The next step is to analyse in greater detail the individual categories and sub-categories to identify what the nuances of the coding can reveal.

8.3.1 Budget Information

The Budget category is fairly straightforward, containing just two sub-categories relating to past budgets and current budgets (See Figure 8-7). By designation, 81% of Media Directors (MDs), 79% of Media Planners (MPs) and 90% of Marketers (Mkts) mentioned some form of ‘budget’ or ‘spend’ as information they were given or had access to for the development of the media plans. This underpins how important this single aspect is.

Category	Sub Category Statement
Budget Information	Past advertising budgets and media plans of the brand/product
	Current budget constraints on the advertising or communications campaign

Figure 8-7: Budget information

Statements included ‘Budget split’, ‘proposal with budget allocation’ & ‘Ballpark Budget’. Only three respondents referred to past media plans: ‘info on any campaigns from the past’,

'Previous media plans', & 'previous year Media Plan'. Other mentions of past advertising were in the context of past responses or performance, and therefore were allocated to the historical information category. A few respondents indicated a touch of frustration, wanting to know what *'the real budget is' and 'the marketing budget'*. One respondent just wanted *'more budget'*. However, as seen in the literature there has been a rise in activation and acquisition-oriented planning. Therefore, reflecting this, statements combining *'Cost per acquisition', and 'activation targets'* were also added to the budget category, because when multiplied together, these generate the overall budget, as shown in the following statements: *"allowable CPA and targets, target costs, activation targets budget (sometimes)"*

This represents a different way to allocate funds whereby marketers look at how many sales are needed and what they can afford to pay for each lead, sale or order, as opposed to considering the overall media budget or share of voice. The phrase current budget constraints would still encompass this, however for clarity it might be advisable for new briefing processes to make this clearer.

8.3.2 Timing Information

The timing category contained six sub-categories, as shown in Figure 8-8, and was again quite straightforward criterion to code, with 61% of Media Planners (62% of Media Directors and 59% of Media Managers) stating they were given information relating to *'Timing', 'Timeframe', 'Campaign Dates', and 'Length of campaign'*.

Category	Sub Category Statement
Timing Information	Advertising production lead times for various media classes
	The product category life cycle
	Length of consumer purchasing decision of the product category
	The brand/product life cycle
	Forthcoming events or activities that might affect the product or brand
	Time imperatives for the current advertising campaign

Figure 8-8: Timing information

Interestingly, only 39% of Marketers mentioned timing information. However, no respondents listed this as information they wished they could get, indicating that those that needed or used the information when developing the media plan had access to it. This potentially reflects the 'always on' nature of much of today's media activity, especially around digital acquisition campaigns (Binet and Field 2008c).

8.3.3 Segmentation and Target Audience:

Segmentation and targeting was mentioned by almost 90% of respondents, although with a much wider range of terms being used. Cowan & Abratt (C&A) listed aspects of 'brand and product targeting, psychographics, demographics and positioning', but the core terms used by respondents were simply *'Audience', or 'Target Audience'*, with some adding *'segments', 'demographics', and 'universe', etc.*, as shown in the Nvivo word cloud in Figure 8-9 overleaf.

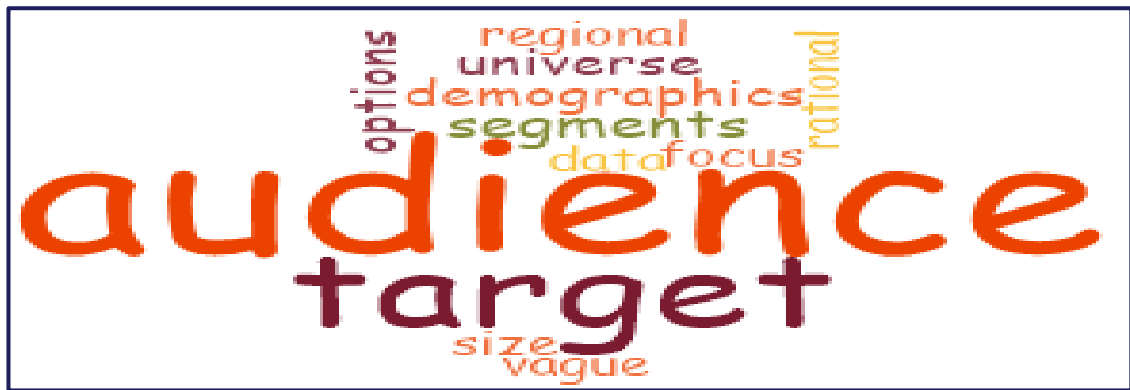


Figure 8-9: Audience information given' word cloud

One respondent listed ‘Vague Audience’ as data given, and ‘Robust Audience’ under information wanted. Echoing this, other respondents said they would like access to ‘customer profiles’, ‘target audience priorities’, and ‘detailed, up to date audience insight’, all suggesting that there is room for greater information sharing here. To help clarify the requirements it is helpful to append more explicit descriptions of what is needed within profile information now. In addition, given the prevalence of geography and location within current targeting options, geography and location was added to these descriptions, as outlined in Figure 8-10.

Category	Sub Category Statement
Segmentation and Target Market Information	Product category user psychographics insight (i.e. lifestyle, interests, self-image)
	Product category user profile and demographics (i.e. age, education, income, location, etc.)
	Brand or product target market profile data and demographics (i.e. age, education, income, geography, location, etc.)
	Brand or product target market psychographics insight (i.e. lifestyle, interests, self-image, etc)
	Current market position of the brand or product
	Media vehicle's audience demographics
	Media vehicle's audience psychographics

Figure 8-10: Segmentation and target market information

These, together with the brand and product positioning information ensure that media planners are able to pursue a range of targeting options, including contextually led programmatic buying that is accelerating in its application as a result of changes in legislation around privacy and approaches to using cookie tracking.

However, whilst subjective, it also felt appropriate to two of the original sub-categories out of this section. The statements related to information about the ‘Media vehicle’s audience demographics’ and the ‘Media vehicles audience psychographics’ seem to be more relevant to the Media Information category. This reflects the move to ‘Audience First’ seen in both the literature (O’Donohoe 2008, Mihart 2012, Romaniuk 2012b) and Study 1. The segmentation and targeting decisions are no longer seen to be driven by the profile of audiences that can be reached by the media. Therefore, data related to the audience profile of the media vehicles should be located alongside other media consumption data that forms part of the media planners’ knowledge base and craft.

8.3.4 Hierarchically linked Objectives

Objectives was another highly mentioned category with 64 respondents identifying ‘*comms objectives*’, ‘*media objectives*’, ‘*goals*’, and ‘*campaign objectives*’ in response to Q2. In addition, 14 respondents included ‘*business objectives*’. One respondent summed this up: ‘*Business objectives; resultant comms objectives (what’s required to hit biz objectives)*’.

However, there were also many mentions of ‘*business objectives*’ and wanting to know ‘*marketing plan & objectives*’ and ‘*overarching business strategy*’ mentioned in response to Q3. Cowan & Abratt stated that MPs needed to understand the broader marketing and business objectives if they were to make more rational decisions. The data would indicate that ‘*hierarchically linked*’ objectives are needed but not always received, with 26% of MPs listing frustration around this area.

Category	Sub Category Statement
Information concerning objectives	Brand or product marketing communication objectives
	Brand or product marketing objectives
	NEW Brand or product organizational Business goals and objectives

Figure 8-11: Information concerning objectives

To ensure that this important data is always discussed it seemed appropriate to add a new sub-category for the business goals, as shown in Figure 8-11.

8.3.5 Communication Planning and Strategy

The wider Communication Planning and Strategy criteria saw 12 respondents stating they received details of ‘*Overall Plan*’, ‘*Other channels*’, ‘*PR Schedule*’, ‘*Comms Plan*’, ‘*wider/broader strategy & plan*’ and ‘*brief on other media*’. But twice that number called for additional data, expressing a desire for ‘*longer term view*’, ‘*what else client/other agencies doing*’, and ‘*social schedules*’, reflecting the expanding array of alternative media that can be used. To accommodate this, a new sub-category was added to help both media planners and clients prompt for any other activity that might be running concurrently, such as email and customer relationship marketing activity. Social media aspects were also considered for this category, as outlined in Figure 8-12.

Category	Sub Category Statement
Communication Planning and Strategy Information	Direct marketing plan and strategy of the brand/product
	Sales promotion plan and strategy of the brand/product
	Public relations and publicity plan and strategy of the brand/product
	NEW Customer relationship marketing strategy and email plans activity
	NEW Social media activity

Figure 8-12: Communication planning and strategy information

These are a particularly blurred area, where a client’s customer services team are often responsible for monitoring and responding to comments, but it can also be delegated to a social agency. It can also be a large part of paid media placement as display advertising is

seeded across social channels as discussed in Chapter 2. Therefore, reflecting the respondent data, a reference to social media was also added to this category checklist. This echoes the fact that all parties benefit and can formulate more integrated solutions by sharing the knowledge of all activities that are being undertaken.

8.3.6 Key Performance Indicators (KPIs)

The next highest criterion listed by respondents was KPIs, with 48 responses saying they received KPIs and 19 stating that they wanted ‘KPIs’ and ‘clear success metrics’. KPIs could be included within the objectives, but they are often viewed differently as they are about benchmarking, setting interim measures to guide success and evaluation targets that contribute to the delivery of the overall objective (Binet and Field 2008d, Saura *et al.* 2017). Alongside KPIs, respondents also noted *CPA (Cost per Acquisition)*, *AoV (Average order value)* and ‘conversion rates’, indicating some of the day-to-day targets that were set for them. There is no mention of KPIs in the previous research, but consideration was given to Reach and Frequency (R&F), detailed by Cowan & Abratt as ‘advertising exposure and continuity/frequency required’ (Cowan and Abratt 1999). R&F was often linked to recall as a proxy for effectiveness, however, today’s digital pathways allow for greater accountability and as advocated by Binet & Field (2008), simply showing that people recall a campaign, does not prove the campaign worked. As discussed in Chapter 4, Binet & Field advise that ‘hard objectives’ and ‘measures of financial return’ are the ultimate evaluation metric for all commercial campaigns. KPIs and the other success metrics described by respondents definitely fit with this principle. Renaming this category and adding new sub-category descriptions would offer similar guidance for media planning as the previous R&F criteria, but ensuring that it is updated to help Media Planners and Marketers correctly agree on the required outcomes and steps along the way. Therefore, as described in Chapter 6, this category was renamed, and two new sub-categories added.

Category	Sub Category Statement
KPIs	Media vehicle audience exposure (reach)
	Average frequency of the media vehicles schedule
	Advertising exposure (reach) and continuity (frequency) required
	Number of sales messages intended to be communicated in the campaign
	NEW KPIs for the media activity
	NEW Targets and benchmarks for the campaign

Figure 8-13: KPIs information

There is the possibility for duplication with the budget setting aspect, but this is avoided by the budget category requiring the combination of activation targets and costs in combination.

8.3.7 Creative Information

Creative information was the next criteria to be analysed. 37 media professionals and 5 clients said they were briefed on and used some form of creative information in their media planning. Cowan & Abratt described ‘past marketing themes, advertising campaign strategy and related complexities of the advertising message’ as the information required here, however

the planners predominantly mentioned ‘*assets*’ and ‘*formats to plan to*’, very functional terms for the physical or digital creative elements.

Very few respondents stated they received briefing on ‘*creative messaging*’. This is surprising as context and relevance is a key targeting goal within digital media and used to overcome the rise of consumer Ad blocking. But this may account for why 21 respondents wanted information on ‘*creative messaging*’, ‘*creative ideas*’, and ‘*what the creative looks like*’.

Category	Sub Category Statement
Creative information	Past advertising themes of the brand or product
	The advertising campaign’s creative strategy
	The complexity of the advertising message
	NEW Creative Assets and Formats

Figure 8-14: Creative information

These general themes fitted neatly with the existing sub-categories shown in Figure 8-14, with a new element added to encompass assets and formats.

8.3.8 Product & Brand and Market Size

Data relating to the product, brand and market was mentioned more frequently by marketing managers than media professionals. Clients talked of ‘*branding guidelines*’, ‘*company product portfolio*’ and ‘*company performance*’. This would indicate it is of higher priority to clients, which matches Cowan & Abratt’s findings. However, if media professionals are to interpret business objectives ‘more rationally’ and are striving to deliver greater relevance in ad placement, then having a deeper understanding of the market, product and brand would appear to be useful to really understand the problems facing the organisation, as listed in Figure 8-15.

Category	Sub Category Statement
Product/Brand information	Current problems facing the product or brand
	The package design of the brand

Figure 8-15: Product/Brand information

8.3.9 Media Information

Under Media information, Cowen & Abratt (1999) listed 14 sub-criteria including ‘cost per thousands, geography, available measures, vehicles primary function and reproduction quality’, but within the current study these gained few mentions. However, if the definitions was expanded to include paid, owned and earned media (Pringle and Marshall 2011, Smith 2016), 23 respondents mentioned getting data such a ‘*role of display*’, ‘*keywords*’, ‘*media owner case studies*’, ‘*role of channels*’, ‘*platforms in use*’, ‘*channel details*’, ‘*available channels*’, ‘*costs*’ and ‘*digital landscape*’. Reflecting the focus on trading, a number of media professionals also mentioned ‘*platforms/share*’, ‘*understanding key agency deals*’, ‘*trading targets*’ and ‘*trading calendar*’.

In response to Q3, on the information wanted side, there were several mentions of ‘*client requests*’, ‘*restrictions*’, ‘*channel preferences*’, and ‘*client preferences*’, perhaps suggesting a degree of frustration from not knowing client preferences in advance. This also reflects the

blurring of demarcation between who may be responsible for making decisions, particularly as clients take on greater responsibility for owned and earned media and have the lead voice in designing brand guidelines and identifying brand safety guidelines. Therefore, this aspect was added to the briefing checklist, as seen in Figure 8-16.

Closer inspection of the pre-existing categories also suggests that some of the aspects are now redundant in the digital environment. Digital is fully embedded across all forms of media and it is likely that ‘traditional and non-traditional’ media vehicles has ceased to be a definition to differentiate digital options. This is an aspect that should be researched further.

Category	Sub Category Statement
Media information	Traditional and non-traditional media vehicle options available
	Number of different media classes to be used in the campaign
	The geographic flexibility of the medium
	The production flexibility of the medium
	Advertising production costs for various media classes
	Cost per thousand of the media vehicle
	Editorial environment of the media vehicle
	Advertising clutter of the medium/vehicle
	Reproduction quality of the media vehicle
	Credibility of the media vehicle
	Media vehicle’s primary function (e.g., to entertain, inform, advertise)
	Relationship between the audience and the vehicle
	Potential/available measures of advertising effectiveness of the medium/vehicle
	Longevity of the medium of vehicle
NEW Preferred Platforms and Restrictions	

Figure 8-16: Media information

8.3.10 Historic Information

Historic information, as outlined in Figure 8-17, is another area that changed dramatically once the definition was broadened to include owned media data, and terms such as ‘social listening’, ‘social media monitoring’, ‘tracking being used’, and ‘Google analytics’ were interrogated and judged to match with Cowen & Abratt’s descriptions of ‘past history of responsiveness to advertising’. Based upon this it ranked highest amongst the data wanted, with requests for ‘response data’, ‘previous campaign results’, ‘customer data match-backs’, ‘digital analytics’, ‘key conversion times’, ‘learning from other campaigns’, and ‘tracking data’.

Category	Sub Category Statement
Historic information	Historical development of characteristics of the product category
	Historical development of characteristics of the brand or product
	Past history of responsiveness to advertising of the brand or product

Figure 8-17: Historic information

These are important factors that feed into targeting decisions which are increasingly based upon behaviour rather than demographics, especially where digital programmatic tools are available (Lin *et al.* 2013). This is an aspect that should be researched further and could be expanded as new forms of measurement and digital attribution become available.

8.3.11 Sales information

The coding also had to consider how digital data overlaps with much of the description included within the Sales Information category, because the sales function is also closely attributed to digital advertising. However, the sales statements remain distinct and different. Media planners and clients need to understand the correlation between sales patterns and how they respond to advertising efforts. Generally, the data will be from different sources, particularly where on and offline distribution options exist. There are many aspects of attributing that remain based upon correlations, rather than being able to identify direct causation. Therefore, this data should be maintained as discrete from historic advertising response data to allow for clear evaluation to take place.

Category	Sub Category Statement
Sales information	Monthly/seasonal sales patterns of the product category
	Brand or product sales and distribution strategy
	The unique selling proposition of the brand or product
	Monthly/seasonal sales patterns of the brand or product
	Geographical sales patterns of the brand or product
	Customer sales analysis of the brand or product
	Sales forecasts of the brand or product
	Sales history of the brand or product

Figure 8-18: Sales information

8.3.12 Owned Media

A new category for the client's 'Owned media' data was identified as being useful to ensure that aspects of *'tracking'*, *'attribution modelling'*, *'econometric modelling'*, *'web stats'* and any other client data can be clearly identified. This is accompanied by a series of sub-categories to separately identify the different aspects that clients are now responsible for in a clear way. Once this category was established, it can be seen that nearly 40% of respondents indicated they received this type of information (Q2). Likewise, around 40% said that it was information they would like to receive, making it the second highest category of information that was wanted but not received (Q3).

Category	Sub Category Statement
NEW Owned Media	NEW Brand or Product Social Media activity and monitoring
	NEW Brand or Product website or GA tracking data
	NEW Brand or Product website or landing page
	NEW Customer Database

Figure 8-19: Owned media information

8.3.13 Remaining categories

Other criteria such as Consumer Behaviour information and Competition information were only mentioned a few times, by respondents. Even within this, an additional aspect was added to the Consumer Behaviour category to highlight the need to share information on the customer journey behaviour and any relevant customer feedback that is received.

The final collection of unmatched terms was clustered around the concept of 'Briefing', with a number of respondents saying they received a brief. However, most comment around this were in the information required, with a lot of comments around 'better briefing' and 'with more insight from the marketing plan'. Similarly, respondents wanted 'feedback', 'more time', with one respondent asking, 'who's making the decisions; who's doing the briefing'.

8.4: General observations

This survey included both media planners and marketers involved within the media briefing and media planning process. This reflects the work of both Cowen & Abratt (1999) and Arul (2012, 2013) and facilitates a number of observations between the sets of data. There is a distinct aspect that appears to be the responsibility of the marketers and others that reside with the media planners. Some of the respondents offered short explanations supporting their answers to Q2 and Q3 through the open field included in Q4. For instance, one respondent noted that "*Budgets, objectives and timeframe generally come from the client Brief*" (MP2)

Media frustrations seem to remain, as shown in the quote from MD1 below, however, it is unclear if this is a frustration with clients having media preferences or with internal trading deal restrictions.

" More control over partners that can be used for the media delivery" (MD1)

Likewise, as seen in the analysis above, there is still a demand for more historic information, including the client back-end data, to improve targeting, drive efficiency and to set or monitor KPIs:

" It would be great to get more backend client data. Web traffic/click stream to show how leads are converting and whether the AOV/value differs" (MD1)

" If digital - owner access of the adserver to allow more data/analytics input. More granular KPI outcomes from the previous media activity." (MD2)

" Internal historical sales data on the product/service, e.g. Audiences, time they purchased, lifetime value etc. (MP1)

Some of the Media Directors offered insight into why this might be, commenting:

" clients see this as sensitive data that can give them an advantage but unsure how to use it and whether to give it to us" (MD1)

" clients don't think [we] are the right person to have it (MP1)

One of the most interesting comments indicated that there is a move amongst clients to recruit in-house analysts who are now filtering the information that is given to agencies. One reason offered for this was from MD5, who stated "*I think all the bad press over the last few years makes them cautious & they are unsure of the value of the data*". Therefore, there are a variety of reasons that might be responsible for why clients are not sharing the required data with agencies.

Chapter 9: Discussion and conclusions

9.1: Introduction

The core objective of this research study was to explore the strategic practices, models and processes being used to guide the media strategy formation and the media planning process, in order to identify if new approaches are emerging and if so develop a media planning framework that would more accurately represent this.

This was achieved firstly by exploring the literature to identify the major theoretical frameworks, concepts, issues and debates within the fields of advertising, media planning and strategy making that support understanding and execution of media planning. This revealed that the process is highly complex and builds on a wide range of models and theories related to media, communication, consumer behaviour and economics. It showed that the role of the media planner has changed over the last few decades from being focused upon the implementational optimisation of advertising time and space, to being a more central part of the strategic planning team, and responsible for developing marketing communications solutions that deliver business results.

As such, the literature indicated that setting the media strategy had become an important and distinct part of the media planning process. This was the first significant change in practice that was identified.

Further exploration of the strategic management literature also indicated that the complex and turbulent digital environment was likely to have impacted on the decision-making approach that underpinned the strategy making process. This was captured within the conceptual framework and proposed that media strategy and planning should have become more emergent to enable it to be able to respond to the dynamic digital environment and to explore this, two further research questions were established to guide the primary research:

- RQ2: What are the narratives around how media planners currently approach media strategy and planning?
- RQ3: What types of data do media planners currently use to formulate the media strategy and plan?

The main conclusions to these studies are outlined here and led to the development of both a revised media planning process framework and a new checklist of information sources to be considered as part of a comprehensive briefing between agency and client. These are supported with examination of the implications for both theory and the teaching and practice of media planning.

9.2: The link between strategy making and complexity

One of the first aspects of this study was to explore the strategy making process and how the turbulence and complexity of the digital environment might impact it. This showed a wealth of evidence that a more iterative emergent style of strategy making was appropriate in dynamic and turbulent conditions.

This was articulated through the conceptual framework as shown below in Figure 9.1 and originally presented in Section 3.7, p. 70. This combined the discussions of Stacey and Mowles (Stacey 2007, Mowles *et al.* 2008, Stacey and Mowles 2016), Reeves *et al.* (2015) and Regnér (2003, 2008) with the underlying Strategy Concept model (Mintzberg, *et al.*, 2003), to include more aspects of the current debate around strategy making approaches that accommodate the complexity and unpredictability seen in the environment.

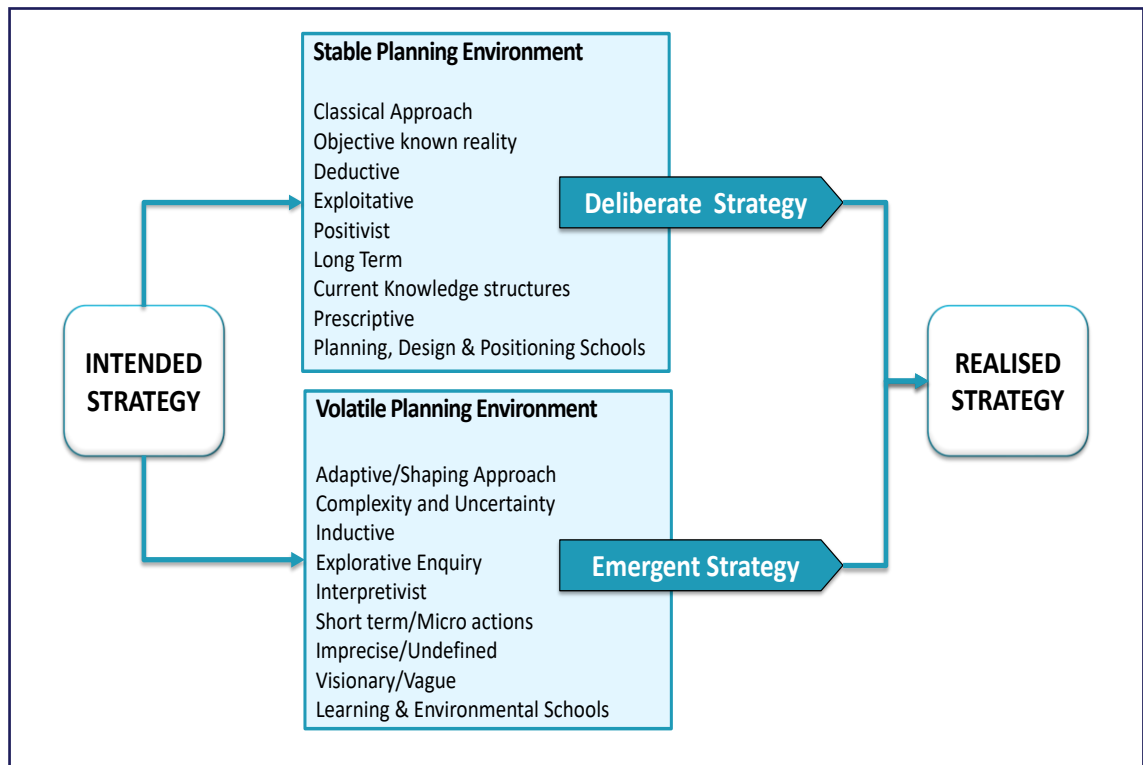


Figure 9-1: Conceptual framework demonstrating anticipated change in media strategy making in the face complex and turbulent digital environment.

The suggested divergence between Classical deductive and Adaptive inductive strategy practices is underpinned by the changes in planning environment and suggest that the process needs to be more adaptive and emergent when faced with a volatile environment.

When applied to the field of media strategy and planning this helped to develop the hypothesis that more emergent and iterative media strategy-making processes may have been developed to meet the needs of the digital environment.

This model was used to evaluate and interpret the primary research around how media strategy makers describe their strategy-making process, to identify where the similarities and differences might lie, and if there are any nuances that suggest a new approach.

9.2.1 Existing media planning frameworks show a deductive process approach

Chapters 2 to 5 reviewed the research and advice offered to media planners by academics and practitioners through the literature on strategies proposed to help deliver the required objectives. The early work showed that media planning work was primarily an implementational activity of optimising the media budget, as such, the focus was on

identifying mathematical methods that would deliver the perfect schedule and meet the media objectives, in terms of impacts, reach and frequency, prior to committing the media budget through the buying process (Georges 1963, Metheringham 1964, Broadbent 1966, Little and Lodish 1969, Little 1979, Pasadeos *et al.* 1997). The research of the time was dominated by a focus on vehicle selection and maximising exposure efficiencies of individual media impacts within the constraints of the budget allocation.

More recently the research has shifted to a wider variety of topics and concepts such as how communication might work, the role of context on engagement, irritation and memory, the opportunities presented by cross platform and simultaneous media consumptions to create positive synergies, and issues around the nature of impact, such as frequency, saturation, carryover, decay etc., (Bang *et al.* 2005, Appleton-Knapp *et al.* 2012, Danaher and Dagger 2013, Robertshaw 2017, Schultz and Block 2018). These are all designed to help strategists and planners make sense of communication opportunities offered by the myriad of media channels and vehicles that are now available. These topics are oriented toward improving the art of media planning by supporting heuristics that can be used to shape the strategy.

A number of overarching framework models have been developed to guide the media planning process. The simple flow diagram proposed by Sissors and Petray (1976) clearly identifies the media strategy stage, placing it before the inter-media and intra-media selection aspects. The more detailed process models developed by Barban *et al.* (1993) and Cannon (2001) emphasised that media planning should be nested within the marketing plan and the need to consider the overall marketing communication before defining the media strategy. However, they also suggest that the media strategy should encompass the evaluation and assessment of scheduling options, with the optimal solution being put forward as the recommendation for the media buyers to deliver. Options are reviewed objectively in the confidence of a relatively known and stable environment and the ability to reliably implement the prescribed proposals. Because it relies on current knowledge structures it is more exploitative than exploratory in nature. Having identified the optimal solution to deliver the goals, the recommendations are agreed and handed down to the media buyer for implementation. The 'realised strategy' is therefore very deliberately seen through, as described in the Strategy Concept (Mintzberg, Lampel, Quinn, & Ghoshal, 2003, p. 143).

Building on this, Barker's (2007) process model signalling the growing iterative nature of media planning and the increased need for schedules to be updated and optimised at the implementation stage. However, this still suggested that the process was a relatively linear progression from briefing through to execution. Therefore, the basis of this framework, and the strategy making process, remains essentially deductive.

The traditional process offered has therefore been to formulate a strongly intentional & rational media strategy, using internal & external background data to evaluate, identify & prescribe the media strategy and optimal media schedule to deliver marketing goals (Barban *et al.* 1993, Donnelly 1996, Broadbent 1999, Sissors and Baron 2010, Katz 2019). This assumes extensive analysis will allow 'rational actors' to design the optimal solution to ensure

organisational survival. It resonates with Planning, Design and Positioning Schools of strategy making, being based upon a strongly rationalised approach, underpinned by economic theories that suggest agents enacting strategic choice adopt an ontological objectivity stance (Porter 1996, Faulkner 2002, Stacey 2007, Lampel *et al.* 2013, Stacey and Mowles 2016).

The literature review, therefore, provides evidence that the existing media planning frameworks are underpinned by a classical approach to strategy making.

9.2.2 Media strategy and planning is now a more emergent process

Looking through the narrative of the interviews it is clear that the hypothesis of the conceptual framework is corroborated, and supports the research of Reeves, *et al* (2013) and Oliver (2015) that those within the advertising media industry should be using a more emergent and adaptive approach to strategy making because of the dynamic nature of their operating environment.

The phrases used to describe the working environment support the assertion that media planning is now enacted in a complex, turbulent and unpredictable state, including statements such as:

“ In this fast-paced moving world” [MD1] and “Operating on the edge of chaos [MD1]

“ Agility, speed, are we moving fast enough? [PD3]

“ Digital can scale things very quickly” [PD1]

“ It’s an incredible change that’s taking place”[MD3]

Building on this, participants described a more adaptive process, with the full campaign and budget allocation emerging over time as the teams explore and interpret the complex, uncertain and rapidly changing media environment. The media strategy no longer involves prescribing the optimum schedule based upon evaluation of alternatives because campaigns need to be flexible to the rapidly changing media environment.

This supports the hypothesis that media planning is now more adaptive and inductive in its approach. In addition, there is now a clear separation between the setting of the media strategy and the optimisation undertaken throughout the implementational stages. The media strategy underpins the visionary element of the more emergent strategy making style. The iterative implementation demonstrates the inductive exploration of the learning school, supported with small micro actions.

9.3: Developing a media planning framework

Looking at the detail of the media strategy formation and the media planning process was a core objective of this study, with the aim of developing a media planning framework that would more accurately represent what is actually taking place. In considering how that new process might unfold, the individual steps were explored both within the literature and with professionals currently involved with the task. This indicated a number of changes to the existing frameworks.

9.3.1 Goals and objectives remain the start point

When reviewing the media planning process holistically, the study indicates that there is no real change to the start point for the strategy making process. The initial briefing remains the most important aspect, and the opportunity for a detailed exchange of information, data and feedback to be incorporated to ensure the next campaign or action can be optimal. Within this, identifying the goals and objectives remains imperative. However, whilst there has been comprehensive debate underpinning the importance of media planning being grounded within the marketing objectives (Barban *et al.* 1993, Donnelly 1996) it is now evident that there needs to be a clear hierarchical link back to the organisational objectives to ensure that the advertising is being designed to deliver the outcomes that the business wants. These can include long and short-term goals across both behavioural and attitudinal aspects.

9.3.2 Media planners are now business partner

The key change was that the goals and objectives are now linked to the business outcomes rather than just media impacts or consumer measures. Media planners describe themselves as business partners and the media agencies are more central to the communication decisions making process for their clients as evidenced many times across both Study 1 and 2 by the participants, for example:

“ How are you going to help transform our business” [MD1]

“ We’ve gone from people that hung ads in places to, potentially, a really important business partner [MD2]

This corroborates the position adopted by Young (2014) and reinforces the need for media objectives to be able to show a hierarchical link back to the business objectives. Although both studies indicated that to get the required information needed detailed briefing and having the right calibre of staff to be able to ask the right questions.

9.3.3 Media strategy begins with audience insight, not optimising media impacts

Another key conclusion from Study 1 is that the overall approach to developing the media strategy has changed. The literature indicates an historic role of optimising media impacts, with quantitative aspects, such as cost-efficiency and the reach and frequency of delivery, being key topics throughout the discourse.

The study indicates that understanding the audiences’ relationship with the product, brand or situation is now the start point. Data or audience research are used to gain insights that can shape both the communication strategy and underpinning media strategy to drive the required attitudinal or behaviour outcomes.

“ are you trying to make loyal customers do something or trying to break old habits and create new habits? Creating new habits really, really has a big effect on how you use media. [PD3]

This is also demonstrated through the rise of seeking situational relevance and re-emergence of context as an important planning criterion. Because of this qualitative focus, intuition and the use of heuristics remain an important part of the media strategy making

process. In combination, these aspects continue to reinforce the interpretivist approach to selection.

9.3.4 Media strategy and planning combines art with science

The media modelling literature shows that for over half a century, academics and practitioners have been trying to find a mathematical solution to resolve the complexities of the media planning decision process. Early discourse proposed various algorithms or ‘programming’ techniques to help optimise the qualitative and quantitative aspects.

Participants also indicated that their organisations had developed proprietary programmes to help evaluation and optimise media recommendations. However, whilst using methods such as econometric modelling, they reject pure black box thinking and optimisation. They note that it is important for the strategist to put their own thinking on the front end. They identify that if everyone uses the same programme and data, plans would become homogeneous, and that the very principle of the media strategy is to build competitive advantage. They note that even where formats and creative assets may indicate specific types of media vehicle characteristics are required, the individual channel selection can be more fluid.

“You still need to have that intelligent, insightful view of the audience, and ... a degree of intuition about when and where the right place is” (MD2)

9.3.5 Prescriptive budget allocated no longer part of media strategy

Historically, both practice and the literature recognised that the budget would be allocated down to the last penny and signed off by the client to be implemented as instructed. Now the strategy offers a vision of which channels offer the opportunity to engage with the audience at the right time and place to confer relevance upon the interaction created. That strategy is crafted to align the communication back to the marketing and business objectives for the activity and is described as being more focused upon creating moments of relevance with the audience rather than maximising impacts. Because of the demand to consider the business and marketing implications of the proposed media strategy, it is vital that the strategist is well briefed and familiar with the client’s brand world, including having a detailed understanding of the issues facing the client. The actual implementational plan builds on day to day, and often real-time, micro-actions of both the planners and the consumers. As such it changes, it adapts and learns quickly from these interactions to optimise and move forward.

Consequently, the budget allocation is no longer a prescribed output of the media strategy making process. General ideas of how the budget might be allocated at the initial stages of the campaign are reflected within the communication strategy and formats used, but the specific channels may vary hugely as planner buyers look for the most relevant opportunity to reach the audience in a rapidly changing media environment. As a result, the ultimate budget allocation was described as an output of the finished campaign.

9.3.6 Learning and iteration are a fundamental part of the process

The study shows that media planning is now a highly iterative process, where the learning from each interaction is evaluated to help plan the next element. The time period between these stages can be very short, particularly where programmatic and real-time data is available. This supports the fact that media planning is now less deliberate and prescriptive in its approach and emphasises flexibility to optimise activity in realtime as data and information becomes available.

9.3.7 Planning frameworks must incorporate the iterative nature of the process

The existing planning frameworks outline a linear or circular process approach. The study indicates that the circular, sequential models were the most appropriate. However, there should be more of a distinction between the inter-media planning stage, which establishes the media strategy, and the implementation intra-media stage, with the implementation being clearly identified as a learning and iterative stage where new information is gathered. Participants agreed that the current sequential model proposed by Barker (2007) needed to be revised to incorporate the more iterative approach that is being applied, with the consensus that some form of dividing arrow that navigated the planner from the analysis stage back to the scheduling elements was vital.

9.4: New media strategy process framework

To recognise these changes, a number of adjustments are recommended to the previous overarching process framework as outlined in Figure 9.2.

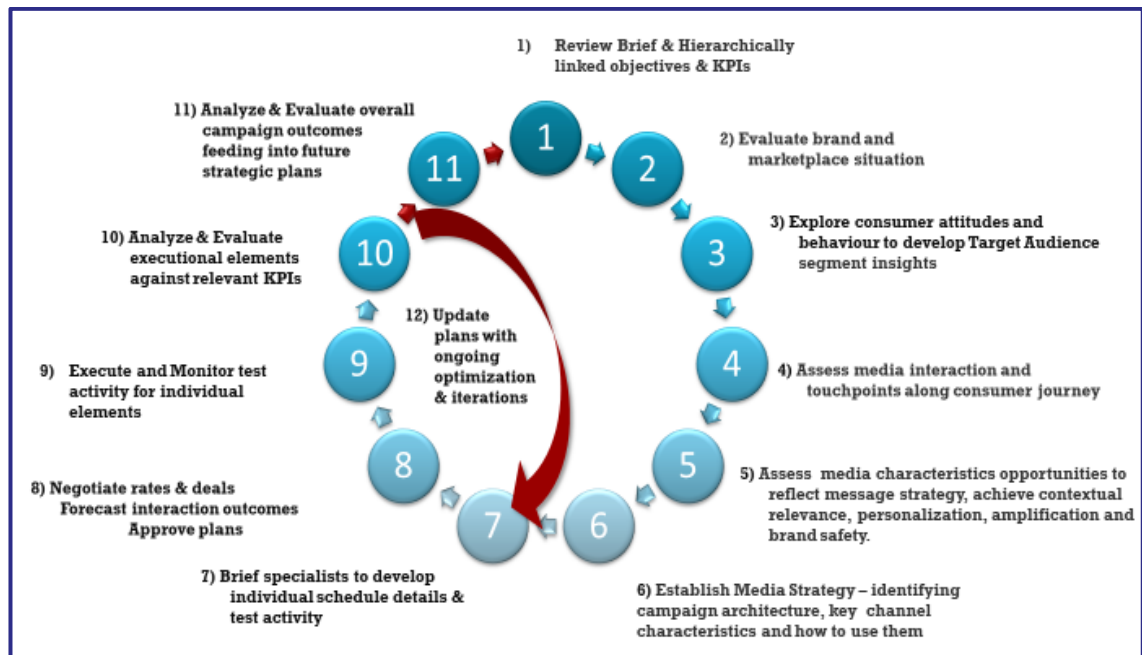


Figure 9-2: Proposed Model of Media Planning Process

Firstly, reflecting the importance of the business partnership that is now evident, the framework explicitly incorporates the marketing briefing and establishing of hierarchically

linked objectives from the business, marketing and communication goals, through to the media objectives.

Secondly, the evaluation of the current situation and marketplace is highlighted to begin insight generating and assimilate the briefing details.

The next important step is to define the audience, which participants indicated is a major driver of strategic decisions. Media is then assessed from the viewpoint of its ability to create positive interaction with that audience. The customer's journey is mentioned to embrace the variety of objectives that might be required, ranging for example from broad awareness through to customer conversion, reflecting the presumed hierarchy of effects.

Detailed media experience is then applied to assess the full characteristics of the media to identify those that can deliver the required communication suitably within the timing and budgetary constraints.

These five elements in total lead to the setting of the media strategy by identifying which media will be considered and how they will be combined.

At the intra-media stage, implementational planners and buyers will utilise their specialist knowledge of their specific media area, be it audio-visual or digital, etc., to propose and negotiate the initial detailed schedules and test activities.

Evaluation of these will lead to ongoing optimisation and replanning.

In this digital environment it is envisaged that this framework would be a good online model where each level could be supported with the breadth and wealth of data, theories and heuristics offered by the literature.

9.5: Developing a new media briefing checklist

Alongside the new framework is the ability to produce an updated briefing checklist to include more of the digital data that is being used to guide the details of the media strategy and the implementational plan.

New statements were identified around the demands for client owned data in relation to their own media channels, such as the website and their customer database.

There was a strong correlation between the data from study 1 and 2 in relation to the need to understand the business goals and therefore this needs to be explicit within the briefing procedure. In addition, there was a call for clearer lines of responsibility to be identified. This concept was prominent in the early client brief prepared by the industry and has been added to the statement list to echo this.

In its current format it is a dry list of topics that does not easily open itself up to iteration. This in itself would be a failing in an area that has already been identified as dynamic and highly emergent. The main category or topic headlines are the predominant aspect, with the sub-category statements serving to suggest and nudge the user to consider some of the multiple issues that can be explored under each heading. An interactive form would be the best representation of this.

Table 9-1: Final Media Briefing Checklist

Main Category	Sub-category statement
Budget Information	Past advertising budgets and media plans of the brand/product
	Current budget constraints on the advertising or communications campaign
Communication Planning and Strategy Information	Direct marketing plan and strategy of the brand/product
	Sales promotion plan and strategy of the brand/product
	Public relations and publicity plan and strategy of the brand/product
	NEW ECRM and Email activity
Competitive information	NEW Social media activity
	Share of voice of the competitor's brand or product
	Competitor media expenditure analysis
	Competitors' communication strengths and weaknesses
	Communication strategy of the competitors
	The direct marketing strategy of the competitors
Consumer behaviour information	The sales promotion strategy of the competitors
	Public relations and publicity strategy of the competitors
	Consumption or usage patterns of the product category
	Consumer buying behaviour of the product category
	Consumption or usage patterns of the brand/product
	The expected reaction to the advertising message
Creative information	NEW Customer Feedback
	NEW Customer Journey and Pathway to Purchase Insight
	Past advertising themes of the brand or product
	The advertising campaign's creative strategy
Historical information	The complexity of the advertising message
	NEW Creative Assets and Formats
	Historical development of the characteristics of the product category
Information concerning objectives	Historical development of the characteristics of the brand or product
	Past history of responsiveness to advertising of the brand or product
	Brand or product marketing communication objectives
KPIs	Brand or product marketing objectives
	NEW Brand or product organizational Business goals and objectives
	Media vehicle audience exposure (reach)
	Average frequency of the media vehicles schedule
	Advertising exposure (reach) and continuity (frequency) required
	Number of sales messages intended to be communicated in the campaign
Market size information	NEW KPIs for the media activity
	NEW Targets and benchmarks for the campaign
	Size of the total market for the product category
Media information	Current market share of the brand or product
	Market potential forecasts of the brand or product
	Traditional and non-traditional media vehicle options available
	Number of different media classes to be used in the campaign
	The geographic flexibility of the medium
	The production flexibility of the medium
	Advertising production costs for various media classes
	Cost per thousand of the media vehicle
	Editorial environment of the media vehicle
	Advertising clutter of the medium/vehicle
	Reproduction quality of the media vehicle
	Credibility of the media vehicle
	Media vehicle's primary function (e.g., to entertain, inform, advertise)
	Relationship between the audience and the vehicle
Potential/available measures of advertising effectiveness of the medium/vehicle	
Longevity of the medium of vehicle	
NEW Preferred Platforms and Restrictions	
NEW Owned Media	NEW Brand or Product Social Media Monitoring
	NEW Brand or Product website or GA tracking data
	NEW Brand or Product website or landing page
	NEW Customer Database
NEW Project Management	NEW Agency and Client approved briefing procedure
	NEW Deadlines and timing for project preparation

Main Category	Sub-category statement
	NEW People invovled in briefing and approving project
Product/Brand information	Current problems facing the product or brand
	The package design of the brand
Sales information	Monthly/seasonal sales patterns of the product category
	Brand or product sales and distribution strategy
	The unique selling proposition of the brand or product
	Monthly/seasonal sales patterns of the brand or product
	Geographical sales patterns of the brand or product
	Customer sales analysis of the brand or product
	Sales forecasts of the brand or product
	Sales history of the brand or product
Segmentation and Target Market Information	Product category user psychographics (i.e., lifestyle, interests, self-image)
	Product category user demographics (i.e., age, education, income, geography, etc.)
	Brand or product target market demographics (i.e., age, education, income, geography, etc.)
	Brand or product target market psychographics (i.e., lifestyle, interests)
	Current market position of the brand or product
	Media vehicle's audience demographics
	Media vehicle's audience psychographics
Timing Information	Advertising production lead times for various media classes
	The product category life cycle
	Length of consumer purchasing decision of the product category
	The brand/product life cycle
	Forthcoming events or activities that might affect the product or brand
	Time imperatives for the current advertising campaign

9.6: Interpretation and contribution to theory

This study corroborates the research of Stacey and Mowles (Stacey 2007, Mowles *et al.* 2008, Stacey and Mowles 2016), Reeves *et al.* (2015) and Regnér (2003, 2008), that within the more dynamic and complex environment it is more appropriate to take an emergent approach to strategy making and ensure that learning is acted upon.

Looking specifically at practitioners who work within advertising media strategy and planning the work corroborates the recommendations of Reeves *et al.* (2015) when he suggested that advertising should be looking to be adaptive, if not visionary. It also echoes the work of Oliver (2015) which demonstrated that around 52% of those in a strategy making role within media industry were using an emergent and inductive approach.

Looking specifically at the underpinning theories for media planning, senior media strategists no longer appear to be using a classical deductive approach to define the media strategy. Although still driven by a hierarchy of underpinning objectives, the strategies proposed are more emergent, exploring new opportunities as they develop. Customer data and insights are used to drive the shape of media to be used, but the creative characteristics, together with the context & relevance of the engagement, are derived more intuitively.

The start point is not the optimisation of media impacts or prices to deliver a reach & frequency target. In addition, budgets are not apportioned prescriptively, but emergent from implementation and iteration. Their practice resonates strongly with an adaptive, inductive approach. This is followed by the implementation which uses highly data-driven techniques which allows for rapid learning, iteration and optimisation within and across formats or

channels. Therefore, the media campaign is still highly optimised, but this happens throughout the deployment rather than via prior evaluation.

9.7: Identifying strategic dichotomy

Building on the work of Regnér (2003) the study also sought to identify if the strategies produced at the top or centre of the communication team differed from the approaches being undertaken by the implementational media planners and buyers. Regnér's work suggested that senior teams were often restricted to using classical and deductive approaches exploiting what they already knew, whereas those at the periphery were more exploratory and inductive.

However, the study indicates that both the strategists and the implementational teams demonstrate a little of both these aspects. The aspect of 'what you know' is reflected in the importance of the combination of 'art and science' which mixes both experience and insight. The strategies are informed but only loosely defined to enable iteration and emergence as new opportunities arise.

The implementational teams use data and algorithms alongside experience and environmental scanning to analyse, respond, re-plan activity and optimise the final campaign, sometimes in real-time. Each day they are exploiting what they know, whilst exploring what they might do tomorrow. There is no apparent dichotomy between levels or teams.

9.8: Interpretations and contribution to practice

Client organisations need to recognise this greater separation between strategy making and implementational planning, buying and optimisation. The media strategy and inter-media decisions need to be recognised as the source of competitive advantage that will drive relevant communications that strive to engage the consumers in a brand experience. It is the craft of the planner that will deliver this – not the black box. However, the plan will be optimised and updated, often in real time to ensure that the day-to-day media placements are as efficient and effective as possible, driven by algorithms and advanced planning systems.

Media and communication strategists need more information and time to think; to draw upon customer insights & media knowledge and craft a strong vision that delivers the relevance and cut-through needed to achieve objectives. This requires the confidence to outline the shape of the overarching media strategy without prescribing exactly how the budget will be deployed.

The implementation planners and buyers need to have the latitude to exploit their knowledge of the rapidly changing landscape with final schedules emerging from multiple closely related iterations and optimisation.

This approach is differentiated from short termism or tactical optimisation, because it identifies longer term, hierarchically linked business and marketing goals to develop the communication strategy to guide the implementation of the media plan.

The key interpretation for practice is in the presentation of an updated media planning process to help guide practitioners and those looking to understand media planning strategy

making, such as students and graduates undertaking relevant vocational courses or looking to go into the creative industries.

The research also offers an updated framework for the briefing procedures between clients and agencies. Briefing remains an issue with incomplete data being shared, despite the fact that we now operate in such an apparently data driven world.

The study also indicates that alongside the use of data to inform decisions, expertise and individual interpretations of data are highly valued. It is hoped that the use of the briefing framework in conjunction with the media planning process framework will assist clients and planners to achieve greater levels of understanding and in turn develop campaigns that deliver their objectives even more successfully.

9.9: Limitations and future research

The greatest limitation of this research is that it is restricted to media strategists within London and the South of the UK. Findings may differ across continents, where approaches and techniques may be different. Research across a wider base of organisations, regions and countries would be valuable.

Further research should be undertaken to test the proposed model with more agencies and clients to gain insight into whether it represents their current processes. Undertaking both quantitative and qualitative research to evaluate more details of the process steps undertaken throughout the media planning process would be useful to corroborate or update the proposed framework. In addition, it would be interesting to see if the model helps to explain media strategy making processes to new graduates, whether on the client or agency side.

In terms of briefing, now that a new list of information needs has been identified, it would be useful to test this in a similar manner to the previous research. Specific elements, such as historic information, appear to be 'wanted' by both marketers and media planners, and it would also be interesting to find out why this data is not forthcoming, and where it can be obtained from. Similarly, owned media data was on both marketers and media planners wish lists.

This should be something that the clients are able to provide but it may be that internal policies prevent this information being released from IT or operations teams to support the marketing function. Some participants seem to be less worried about briefing and data availability which suggest that they are more aware of the bigger picture issues, but others suggest that information fails to flow through organisations to more siloed partners, specialists or junior media planners. This could be a conscious or unconscious failing and warrants further research to review internal briefing procedures and assumptions that might indicate why this aspect is a problem.

If the research project were being undertaken again in the light of the knowledge acquired the methods chosen might differ. The inclusion of a survey to ask a wider base of respondents to outline their process steps and indicate the priorities for determining the best media

strategy would have been useful. Therefore, future research could look to test the model and compare and contrast it with a wider base of responses through the use of survey techniques.

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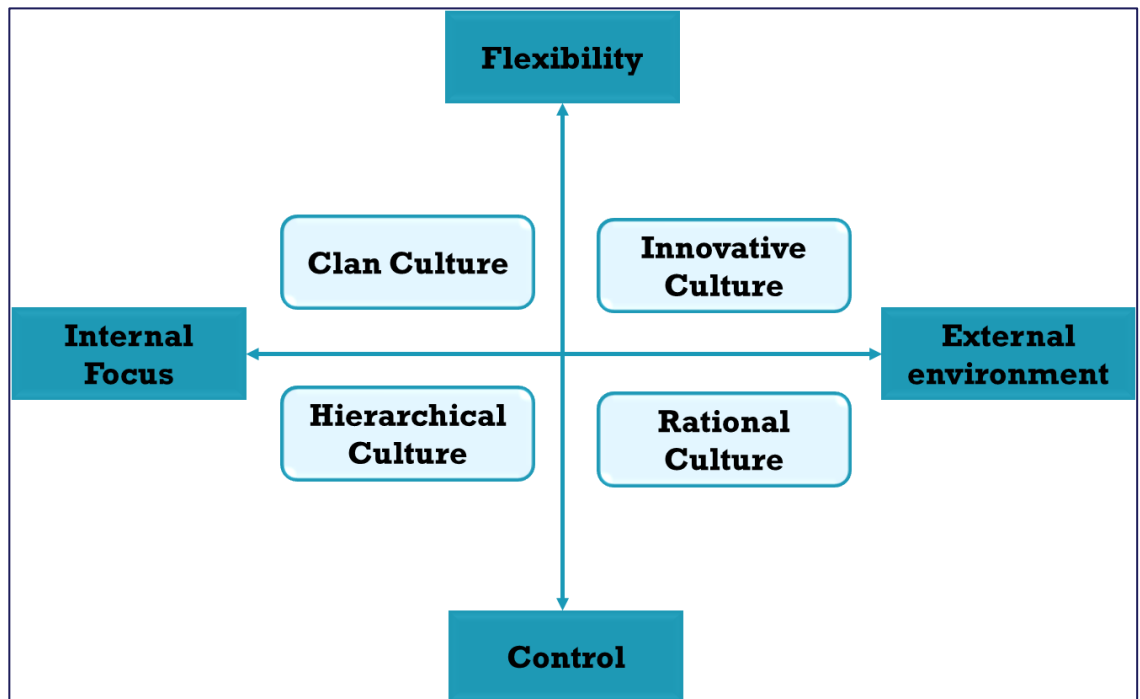
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Chapter 11: Abbreviations

ABC	Audit Bureau of Circulation
AHP	Analytic Hierarchy Process
ANP	Analytic Network Process
CPC	Cost Per Click
CPT	Cost Per Thousand
DCF	Discounted Cash Flow
DMA	Direct Marketing Association
IAB	Internet Advertising Bureau
IMC	Integrated Marketing Communications
IPA	Institute of Practitioners in Advertising
MCDM	Multi-Criteria Decision Making
MNP	Media Neutral Planning
NRS	National Readership Survey
OE	Operational Efficiency
OTS	Opportunities To See
ROI	Return on Investment
ROMI	Return on Marketing Investment
WPP	Wire and Plastic Products plc, British multinational advertising and public relations company
FVP	Frequency Value Planning Process

Chapter 12: Appendices

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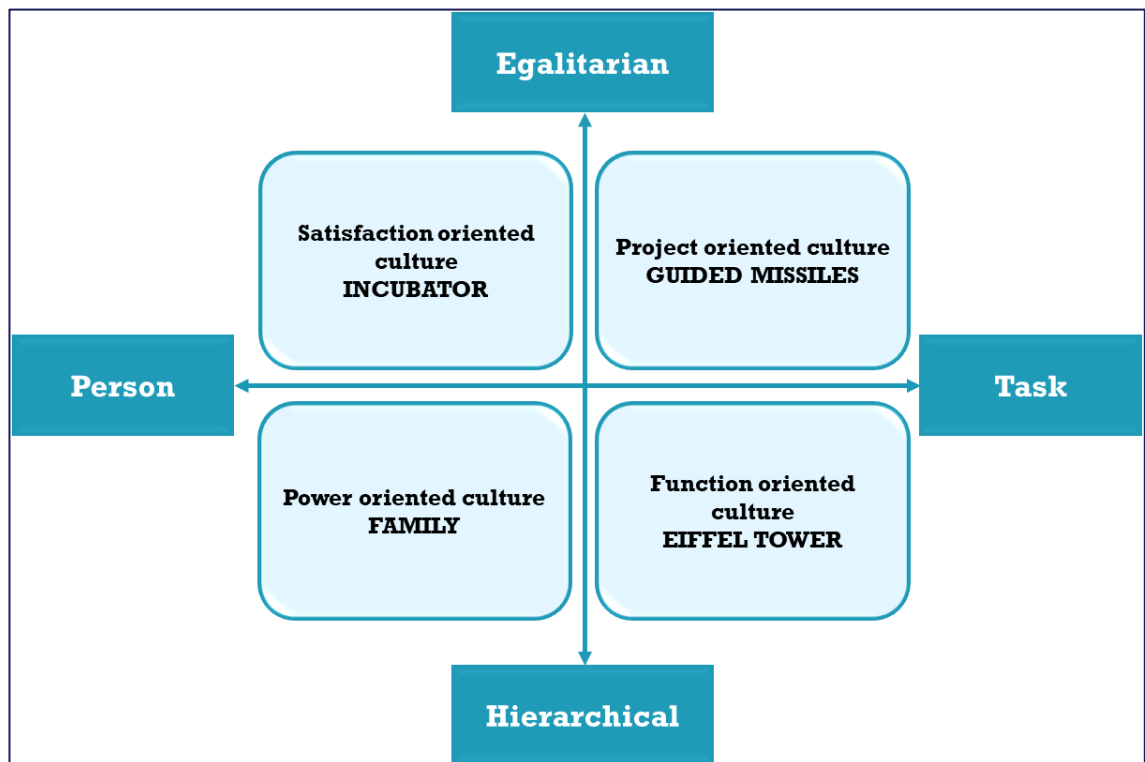
Competing Value Model (CVM) (Quinn & Rohrbaugh, 1983)

Emphasises the conflict between stability/change and internal/external environments.

Typology has four characteristics:

- Clan Culture - associated with affiliation, leadership is participative and consensus building.
- Innovation Culture - values change and flexibility. Motivations includes growth opportunities, stimulation of diversification, and creativity. Leaders are visionaries, entrepreneurs, and idealists. Culturally accept risk and plan for future scenarios.
- Hierarchical Culture - based on bureaucratic values. Organizations cultural assumes stability and continuation of organization; authority formally and fully accepted, behaviours based on rules and regulations. Leaders conservative, avoid risk and emphasise operational problems.
- Rational Culture - based on assumptions of achievement. Motivated by performance and results, future rewards, individuals value competitiveness and meeting goals. Leader goal orientated, hands on, productivity orientated. Organisationally individualistic

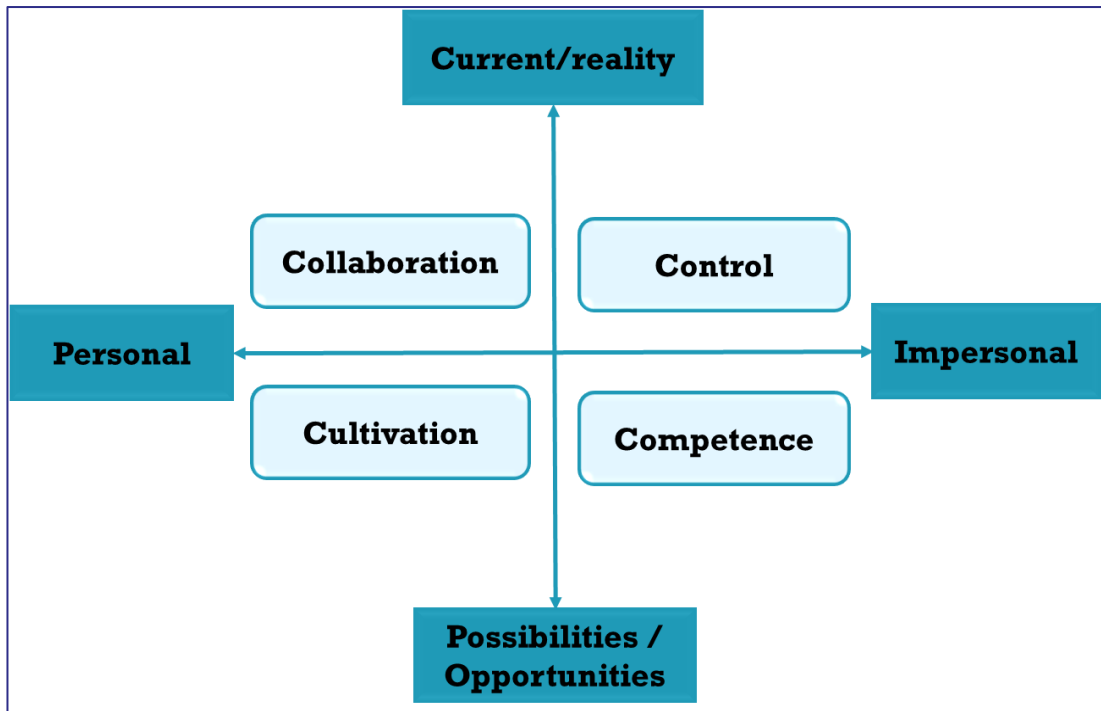
Appendix 12-2: Typology for Organisational Analysis (adapted from Hampden-Turner and Trompenaars 1993)



Typology for Organisational Analysis (Hampden-Turner and Trompenaars 1993)

Key:

- Familiar culture - personal, close, direct but hierarchical relationships. Oriented to power of leader, as in the experienced parent.
- Eiffel Tower - formal bureaucracy, individual responsibility. Rational support with methods and rules. Hierarchy based on duties not individuals.
- Guided Missile -egalitarian, impersonal. Rationalism gives weight to strategic objectives, more group focused, can respond to environment to meet goals
- Incubator - culture directed by final objectives, enabling self-fulfilment of staff, organisational objectives subordinate to personal/egalitarian needs, people oriented.



Cultural Analysis Model (Schneider 2000)

The Cultural Analysis Model involves aspects of leadership, authority, decision making, structure, relationships, staffing, and performance management. Based upon the characteristics of military, family, university, and religious organisational structures. These are categorised along a continuum offered by two vectors Impersonal vs Personal and Reality vs Possible.

The first dimension was personality/impersonality, creating a dimension related to the nature of human relationships in the organisation along a continuum of subjective/emotional/personal through to objective/rational/functional.

The second, proposed an emphasis the way power is exercised within the organisation, so power versus equality. They suggest that smaller patriarchal businesses would cluster together in Family, echoing Trompenaars.

Appendix 12-4: List of category and sub-category questions (Cowan & Abratt 1999, p.44)

Qu	Group	Sub-Group Statement
59	Budget Information	Past advertising budgets and media plans of the brand/product
61	Budget Information	Current budget constraints on the advertising or communications campaign
32	Communication Planning and Strategy Information	Sales promotion plan and strategy of the brand/product
31	Communication Planning and Strategy Information	Direct marketing plan and strategy of the brand/product
33	Communication Planning and Strategy Information	Public relations and publicity plan and strategy of the brand/product
57	Competitive information	The sales promotion strategy of the competitors
56	Competitive information	The direct marketing strategy of the competitors
58	Competitive information	Public relations and publicity strategy of the competitors
54	Competitive information	Competitors' communication strengths and weaknesses
55	Competitive information	Communication strategy of the competitors
53	Competitive information	Competitor media expenditure analysis
39	Competitive information	Share of voice of the competitor's brand or product
66	Consumer behaviour information	The expected reaction to the advertising message
15	Consumer behaviour information	Consumer buying behavior of the product category
13	Consumer behaviour information	Consumption or usage patterns of the product category
28	Consumer behaviour information	Consumption or usage patterns of the brand/product
62	Creative information	Past advertising themes of the brand or product
67	Creative information	The complexity of the advertising message
63	Creative information	The advertising campaign's creative strategy
11	Historical information	Historical development of the characteristics of the product category
21	Historical information	Historical development of the characteristics of the brand or product
60	Historical information	Past history of responsiveness to advertising of the brand or product
17	Information concerning objectives	Brand or product marketing objectives
16	Information concerning objectives	Brand or product marketing communication objectives
34	Market size information	Market potential forecasts of the brand or product
7	Market size information	Size of the total market for the product category
25	Market size information	Current market share of the brand or product
51	Media information	Potential/available measures of advertising effectiveness of the medium/vehicle
46	Media information	Advertising clutter of the medium/vehicle
52	Media information	Longevity of the medium of vehicle
50	Media information	Relationship between the audience and the vehicle
5	Media information	Advertising production costs for various media classes
49	Media information	Media vehicle's primary function (e.g., to entertain, inform, advertise)
47	Media information	Reproduction quality of the media vehicle
4	Media information	The production flexibility of the medium
3	Media information	The geographic flexibility of the medium
48	Media information	Credibility of the media vehicle
45	Media information	Editorial environment of the media vehicle
2	Media information	Number of different media classes to be used in the campaign
1	Media information	Traditional and nontraditional media vehicle options available
42	Media information	Cost per thousand of the media vehicle
37	Product/Brand information	The package design of the brand
29	Product/Brand information	Current problems facing the product or brand

Qu	Group	Sub-Group Statement
65	Reach and frequency information	Number of sales messages intended to be communicated in the campaign
41	Reach and frequency information	Average frequency of the media vehicles schedule
40	Reach and frequency information	Media vehicle audience exposure (reach)
64	Reach and frequency information	Advertising exposure (reach) and continuity (frequency) required
38	Sales information	Sales history of the brand or product
36	Sales information	Sales forecasts of the brand or product
22	Sales information	The unique selling proposition of the brand or product
35	Sales information	Customer sales analysis of the brand or product
18	Sales information	Brand or product sales and distribution strategy
12	Sales information	Monthly/seasonal sales patterns of the product category
27	Sales information	Geographical sales patterns of the brand or product
26	Sales information	Monthly/seasonal sales patterns of the brand or product
24	Segmentation and Target Market Information	Current market position of the brand or product
8	Segmentation and Target Market Information	Product category user psychographics (i.e., lifestyle, interests, self-image)
20	Segmentation and Target Market Information	Brand or product target market psychographics (i.e., lifestyle, interests)
9	Segmentation and Target Market Information	Product category user demographics (i.e., age, education, income)
44	Segmentation and Target Market Information	Media vehicle's audience psychographics
43	Segmentation and Target Market Information	Media vehicle's audience demographics
19	Segmentation and Target Market Information	Brand or product target market demographics (i.e., age, education, income)
10	Timing Information	The product category life cycle
6	Timing Information	Advertising production lead times for various media classes
30	Timing Information	Forthcoming events or activities that might affect the product or brand
23	Timing Information	The brand/product life cycle
14	Timing Information	Length of consumer purchasing decision of the product category
68	Timing Information	Time imperatives for the current advertising campaign

Appendix 12-5: Summary of Media Characteristics (Fill 2013, p. 808)

Table 27.1 A summary of media characteristics		
Type of media	Strengths	Weaknesses
Print		
Newspapers	<ul style="list-style-type: none"> Wide reach High coverage Low costs Very flexible Short lead times Speed of consumption controlled by reader 	<ul style="list-style-type: none"> Short lifespan Advertisements get little exposure Relatively poor reproduction, gives poor impact Low attention-getting properties
Magazines	<ul style="list-style-type: none"> High-quality reproduction that allows high impact Specific and specialised target audiences High readership levels Longevity High levels of information can be delivered 	<ul style="list-style-type: none"> Long lead times Visual dimension only Slow build-up of impact Moderate costs
Television	<ul style="list-style-type: none"> Flexible format, uses sight, movement and sound High prestige High reach Mass coverage Low relative cost, so very efficient 	<ul style="list-style-type: none"> High level of repetition necessary Short message life High absolute costs Clutter Increasing level of fragmentation (potentially)
Radio	<ul style="list-style-type: none"> Selective audience, e.g. local Low costs (absolute, relative and production) Flexible Can involve listeners 	<ul style="list-style-type: none"> Lacks impact Audio dimension only Difficult to get audience attention Low prestige
Outdoor	<ul style="list-style-type: none"> High reach High frequency Low relative costs Good coverage as a support medium Location-oriented 	<ul style="list-style-type: none"> Poor image (but improving) Long production time Difficult to measure
Digital media	<ul style="list-style-type: none"> High level of interaction Immediate response possible Tight targeting Low absolute and relative costs Flexible and easy to update Measurable 	<ul style="list-style-type: none"> Segment-specific Slow development of infrastructure High user set-up costs Transaction security issues
Transport	<ul style="list-style-type: none"> High length of exposure Low costs Local orientation 	<ul style="list-style-type: none"> Poor coverage Segment specific (travellers) Clutter
In-store POP	<ul style="list-style-type: none"> High attention-getting properties Persuasive Low costs Flexible 	<ul style="list-style-type: none"> Segment-specific (shoppers) Prone to damage and confusion Clutter

Appendix 12-6: Submission to LSBU UREC for ethical clearance

1. Title of Study	
Media planning: Exploration of media decision making process in digital environment	
2. Contact Details of Lead Applicant	
Title: Ms Surname / Family Name: Barker	Forename(s): Beverly
Address for Correspondence: Alder Rise, Huntick Road, Lytchett Matravers, BH16 6BB	Telephone Number: 07956 832 952 Fax Number: E-mail address: bbarker@bournemouth.ac.uk formerly_barkerba@lsbu.ac.uk
3. Safety	
Please indicate any possible risks to the investigators, participants, other personnel or the environment: (Please <input checked="" type="checkbox"/> as appropriate).	
<input type="checkbox"/> use of environmentally toxic chemicals <input type="checkbox"/> use of radioactive substances <input type="checkbox"/> ingestion of foods, fluids or drugs <input type="checkbox"/> refraining from eating, drinking or usual medication <input type="checkbox"/> contravention of legislation on any of: gender, race, human rights, data protection, obscenity	<input checked="" type="checkbox"/> potential psychological intrusion from questionnaires, interview schedules, observation techniques <input type="checkbox"/> bodily contact <input type="checkbox"/> sampling of human tissue or body fluids (including by venepuncture) <input type="checkbox"/> sensory deprivation
<input type="checkbox"/> defamation <input type="checkbox"/> misunderstanding of social / cultural boundaries <input type="checkbox"/> nudity; loss of dignity <input type="checkbox"/> compromising professional boundaries with participants, students, or colleagues	
If you have ticked any of the boxes above, please describe the actions which will be taken to minimise the risk. <i>Please see attached schedule</i>	
If this project requires the use of any special procedures or techniques, please describe any training or competency assessment to be undertaken by investigator (s). N/A	
Does the applicant or any member of the research team require a CRB disclosure in order to conduct this research? (Please <input checked="" type="checkbox"/> as appropriate). <input type="checkbox"/> Yes . State why here: <input checked="" type="checkbox"/> No. State why here: <i>Participants will all be competent adults who have freely consent to be interviewed about their professional practice, with the right to withdraw at any point.</i> If a CRB disclosure is required please indicate whether (Please <input checked="" type="checkbox"/> as appropriate). <input type="checkbox"/> The CRB check has been completed <input type="checkbox"/> The CRB check application is submitted, awaiting outcome <input type="checkbox"/> No CRB application has yet been submitted Note: if a CRB disclosure is required, the Secretary of the Research Ethics Committee will need to see evidence of a satisfactory disclosure before final ethical approval can be given. In order to save time, evidence of satisfactory disclosure need not be submitted at the application stage.	
4. Anonymity / Confidentiality	
Please indicate measures that will be taken to protect and maintain the anonymity and / or confidentiality of participants. <i>Participants will all be competent adults who have freely agreed to be interviewed about their professional practice. In return names will be anonymised (by a numbering system kept secure by the author) and any attributable quotations will be with the express permission of the participants. All recordings and transcripts will be kept in password protected files on the university password protected system, and folders and printed materials will be locked in the filing cabinet in the locked office.</i>	
5. Informed Consent	
How will potential participants be invited to take part in the study? If by letter please include a copy of the letter, if by poster please include a copy of the poster and make clear where the poster will be displayed. <i>Respondents have been selected from within larger base of media planning professions who work within agencies, suppliers or client side organisations. Respondents will be contacted by email in the first instance to outline the research and gain their initial consent to talk further with the researcher. Those who agree will be sent a confirmation letter with the author's details and providing information about the project and rationale together a short overview of the interview guide to clarify the type of information that will be discussed and a reminder that they may withdraw at any stage.</i>	
When will participant receive a copy of the participant information sheet? Please include a copy of the participant information sheet. If you are not providing a participant information sheet please explain why.	

Those who agree to be interviewed will be sent a confirmation letter (attached) along with details of the author, the PhD project, its rationale and objectives and clarity on why the individual has been selected, what will be expected of them, how they can confirm their participation or not.

How long will participants have between receiving information about the study and giving consent?

If after receiving the confirmation letter and other information, a potential respondent wishes to withdraw they may do so simply by declining the interview date offered by the researcher when telephoned or emailed to confirm the appointment, or any time up to or during the interview. In addition, if after the event anyone decides that they wish to withdraw their comments from the research they will be able to do so.

Who will obtain informed consent from participants?

Permission will be sought by the author from the individuals who participate with the research prior to the interview when the interview time is confirmed and will be reconfirmed by the author before commencing the interview. Interviewees will be sent the Participant information form with the initial request for interview and will also be presented with a copy accompanying their consent form at the time of the interview.

Please indicate what form of consent will be used in this investigation.

(Please as appropriate).

- Written (note a copy of the consent form must be attached)
 Verbal
 Implied

If consent is verbal or implied, please explain why you are not obtaining written consent.

n/a

Are you offering any incentives or rewards for participating? (Note, normal travelling expenses are not regarded as an incentive or a reward.) (Please as appropriate).

- Yes
 No

If yes, what are they?

Are there any issues related to the ability of participants to give informed consent themselves or are you relying on gatekeepers to consent on their behalf?

There are no issues regarding informed consent as participants are all mature responsible adults, who hold senior positions within advertising and media agencies, supplier and client side organisations who will decide for themselves whether they wish to participate.

Appendix 12-7: Ethics Applications summary of points addressed

Ethics application 1352
University Ethics Research Ethics Committee
 Summary of points to address.

Please indicate your response to each point and specify where changes have been made.

Point No	Point to respond to	Response	Location (doc, pg, para)
1	There is some risk of psychological intrusion and also compromising professional boundaries presented by this research. Please consider these (and mitigations) and revisit section 5 of the form	It is not anticipated that the interview will pose any threat that could be considered a psychological intrusion, but the possibility must be considered and processes put in place to mitigate any such possibility. The participants are high level career professionals who regularly present the agency's credentials outlining their approach to planning when working on new business pitches. They also present planning methodologies and solutions to clients on a regular basis. Therefore the information being sought is something about which the respondents are highly knowledgeable and which they describe and discuss regularly. However, respondents will be reminded that they do not have to answer any questions where they think that they may compromise their professional or company position. In addition, the context of the interview must be entirely non judgemental and the interviewer will in no way be confrontational or opinionated. To ensure this is it important that the researcher maintain a pleasant but neutral manner and does not pass comment on the respondent's answers except to progress the discussion as outlined within the interview guide. Social researchers must strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be voluntary and as fully informed as possible (SRA, 2003). To support this, interviewees will be recruited via a process of personal invitation and informed consent, with the right to withdraw at any point due to any reason and without any requirement to disclose that reason, which should ensure that anyone who completes the interview is entirely comfortable with the process. In addition, the SRA (2003) draw a distinction between unobtrusive methods (Lee 1995: 57-60) and unobtrusive measures (Webb at al.1966 and 2000; Lee, 2000) stating that 'the former being clearly more intrusive than the latter – though that does not excuse the latter from consideration of the subjects' perception of intrusion'. The setting for the interviews will be selected by the respondent and is recommended to be the respondent's place of work. An alternative location would be the university site, using the Ehrenburg Centre for Research as the venue. From a perspective of interviewer and respondent confidentiality, safety and professionalism, Personal / home locations will not be considered at all. Recording of the interview will be made clear in the information sheet, but will be discussed again at the set up to the interview and respondents will be reminded that they can withdraw if they feel that the methods of interview, note taking and recording are intrusive, and that they have the right to withdraw at any point without giving a reason. Boruch & Cecil (1979 & 1982) as cited by SRA describe sampling and statistical techniques for preserving privacy as a mitigating procedure for avoiding undue intrusion. Here again the respondents will be privately contacted in advance and will have their privacy maintained by the procedures for rendering the material anonymous both in its storage and in its use within the thesis write up.	Pg 15, para 3 Pg 16/17

Point No	Point to respond to	Response	Location (doc, pg, para)
2	How will waiving right to anonymity for some participants be managed?	The anonymity of individual participants will not be waived for the interview, the storage, analysis or write up of findings. Respondents will be advised not to reveal information that their employer would consider to be proprietary. However, if respondents wish to discuss some proprietary tools for which details are available in the public domain, the public domain information will be cited without linking it in anyway back to the respondents interview comments.	
3a	Under 'Risks' in the information sheet, please advise participants they should not reveal information their employers consider proprietary, as this may compromise them professionally. Participants should be reminded of this at the beginning of the interview	Done	Pg 25 Sc. 1.8 & 1.10 Pg 26 Para 2
3b	Include PIs contact details on info sheet and also UREC contact details (email) in reference to complaint procedure	Done: Added to consent for, information sheet and invitation letter	Pg 25, App 4, point 1.14
3c	Add UREC number (1352) to documents (e.g. consent form)	Done: Added to consent for, information sheet and invitation letter	Pg 22, App2 Pg 23, App 3 Pg 24, App 4
4	The invitation suggests that participants have already been contacted. Please clarify this?	The invitation was originally designed to send out in advance as it was suggested that it would be useful to get tacit agreement that individuals would be agreeable to participate in the research. However, this was not undertaken as both supervisors advised against it when they read the application paperwork – therefore no invitations have been sent out and the letter has been changed.	Pg 22, Appendix 2

Appendix 12-8: Interview Request Letter

Mr A N Other
Managing Director,
A N Other Agency
Agency House,
Agency Rd,
London

1st September 2017

Dear A

Re: PhD research interview request

Thesis: Media Strategy & Planning: Exploration of The Media Selection Process in The Digital Environment

I am writing to ask if you would be willing to participate in my PhD Research project looking into current practices & processes within media planning.

I have attached an overview of the core proposal, which outlines the aims and objectives for the research, together with a copy of the interview consent form and a whole host of participant information for you to consider.

If you think this is something you would be happy to do, I would like to organise an interview with you. I would anticipate to last between 45-60 minutes. During that time, I would look to explore your thoughts, as an agency communications/media strategist and planner, on current approaches to media strategy and planning. For example, what is your approach to the inter-media selection? What guiding theories or practice do you consider when shaping your activity? How do you optimise effectiveness? What metrics, measures or systems you use to measure effectiveness and/or outcomes of campaigns? Etc.

The research is predominantly qualitative in nature and therefore I am looking to record your personal experiences and interpretation of the issues, however, if you wish to do this from a corporate perspective then that can be accommodated within the research process.

If you think this is something that you would be willing to participate in I would be grateful if you would read the attached consent form and confirm that you are happy to take part.

Many thanks,

Best regards

Beverly

Beverly Barker,
MSc, PGCHE, FIDM, SFHEA
Lecturer in Advertising & Digital Media
Department of Corporate & Marketing Communication
Faculty of Media & Communication, Bournemouth University

Appendix 12-10: Participant Information Sheet

Study title

Media Strategy & Planning: Exploration of The Media Selection Making Process in The Digital Environment

Invitation paragraph

You are being invited to take part in a research study. Before you decide whether to participate or not, it is important that you understand why the research is being undertaken and what it will involve. Please take time to read the following information to decide whether or not you wish to take part.

What is the purpose of the study?

With the rapid increase in advertising and promotional media channels available to the media planner, fragmentation of audiences and generally unconnected media measurement methodologies, this research seeks to understand how the role of media planning may be changing. It seeks to understand the media strategy making process, how those tasked with media planning responsibilities approach media strategy and tactics and what types of measurement is used to determine successful outputs and outcomes. The overall aim of proposing a framework to:

Evaluate the media selection decision making process being used by practitioners to make selections and choices in the digital environment.

Identify how media effectiveness is defined by practitioners and what prospective measures and metrics are suggested.

The study will run for the next year and with the research taking the form of in-depth interviews with senior media planners, communications planners, client side marketers who brief and approve media activity, media owners who devise and report on audience measurement and campaign delivery, together with data and industry organisations who seek to develop planning systems and contribute to the debate. The aim is to identify the processes and metrics that planners and marketers are using to plan and evaluate their campaign activity and how relative effectiveness is judged between media to help inform media selection and budget allocations. Overall the objective is to understand the way in which planners are dealing with the rapidly evolving media landscape and what underpins their decision making and if there is a new paradigm evolving.

Why have I been invited to participate?

You have been invited to participate in this research because you are a senior media planner/communications planner, media owner or marketer within the UK media and advertising industry. The researcher will interview around 20 other of your peers across the industry to give the research the broadest and most representative base possible to answer the research questions.

Do I have to take part?

The research is entirely voluntary. It is up to you to decide whether or not to take part. If you do decide to take part, you will be given this information sheet to keep and be asked to sign the attached consent form. If you decide to take part, you are still free to withdraw and you can still withdraw up to the point of anonymisation and do not have to give a reason.

What will happen to me if I take part?

If you agree to take part in this study, the research would be undertaken at your place of work in a pre-booked meeting room or via an electronically facilitated interview over Skype or 'GotoMeeting' style software. The interview will be a general open conversation and the researcher will use an interview guide to ensure that all the core topics are covered. The researcher will take notes and will record the interview to enable an accurate transcript to be made and analysed. The whole interview should last between 45-60 minutes. Questions will vary depending upon your role but will look to explore what issues and concerns you have in the area of media selection, media strategy & planning, and media measurement, etc., within the current climate. The researcher is a Lecturer and PhD student at Bournemouth University and formerly a Board Director and Media Director within a large UK media independent.

What are the possible disadvantages and risks of taking part?

Apart from the time commitment, it is not envisaged that there should be any other financial or non-financial costs to you for participating in this research.

What are the possible benefits of taking part?

If some common frameworks can be identified that can help overcome the disjointedness between online and offline planning it may help improve how students are taught about this aspect of marketing, it may add to the current debate on integration within both the trade press and academic publications.

Will what I say in this study be kept confidential?

All information collected about the individual will be kept strictly confidential (subject to legal limitations). Transcripts will be held on the university server in a password protected file. The transcripts will be coded so that the respondent is not identified. The list of codes and transcripts will be kept separately within a locked filing cabinet on the university campus. Within the written thesis, and any subsequent papers, the anonymity of the participants will be maintained by using a description of their role rather than either their name or their employer, e.g. Senior Media Director within a top 10 media independent. Where proprietary systems are mentioned these will be described only in such terms as the respondent is happy with. This may mean that they are clearly named e.g. RAID®, or generically, depending upon whether the organisation wishes their proprietary systems to be described or not. Data generated by the study must be retained in accordance with the University's policy on Academic Integrity and will be kept securely in paper or electronic form for a period of up to ten years after the completion of a research project.

What should I do if I want to take part?

If you are happy with all that you have read regarding this study, then you are asked to complete the consent form which will clearly identify all the aspects that you are agreeing to.

Who is organising and funding the research?

This research is not funded by any participating body and it is being organised and undertaken solely by the researcher, as a research student of the Faculty of Media and Communications at Bournemouth University.

Who has reviewed the study?

Research is only undertaken once it has been approved by the Research Ethics Panel (REP) on behalf of the University Research Ethics Committee (UREC). If you have any questions about the approval, or the research process, you should contact the Chair of the

University Research Ethics Committee. Further information can be found at http://blogs.bournemouth.ac.uk/research/files/2012/09/8B-Research-Ethics-Code-of-Practice_February-20143.pdf

Complaints procedure: who can I talk to about this study?

If you have any questions or complaints that you would like to discuss in relation to this study you may contact UREC, at researchethics@bournemouth.ac.uk

Finally, I would like to thank you for taking the time to read this information and hope that you will be able to participate in the research shortly. November, 2019

Appendix 12-11: Outline for semi-structured interviews

Introductory comments

Thank you for agreeing to this interview.

As we have discussed, this study is focused on understanding the issues surrounding media planning in the new digital environment.

With the rapid increase in advertising and promotional media channels available to the media planner, fragmentation of audiences and generally unconnected media measurement methodologies, this research seeks to understand how the role of media planning may be changing, how media planners approach media strategy, media selection, implementation and evaluation. The objective is to evaluate the media selection decision making process being used by practitioners to make selections and choices

The study will run for the next year, with the research taking the form of multiple in-depth interviews with senior media planners/communications planners. The aim is to identify the strategy making processes that planners and marketers are using to develop their campaign activity, media selection and budget allocations. These issues will be triangulated through interviews with media owners and literature.

We have previously discussed the scope of participation and I have here a copy of the consent form which I would like you to sign.

Main body of interview

- Can you tell me what your role is?
- Could you summarize the key responsibilities of your role in relation to communications and media planning?
- Do you work in any specific field / specialism within the media planning function?
- How does it relate to media planning and evaluation?

List of topic headings for discussion:

- Thinking about the planning function, I would like to understand a number of issues relating to media planning, namely...
- Could you tell me about your approach to communications and media planning?
- Commencement
 - What sort of briefing do you get / wish you could get?
 - What sort of information do you have access to and start with?
 - Is there any other information you wish you could have access to?
- Decisions
 - How do you decide which channels to use?
 - How do you select the most effective medium/media for the marketing communications task?
 - How do you apportion budgets to them?

Deepening justification/explanation

- What are the biggest challenges when approaching a new campaign?
- How would you describe the environment you work in?
- When planning, what are the key drivers/big idea that shape your selection of channels and vehicles?
- What role does intuition play in planning?

Probing and clarifying

- What models and theories help shape your plans?
- What sort of information do you receive to help you make inter-media channel planning decision?
- Is there other information that you would like to receive that could assist in your planning decisions?

Elaborating

- What types of measures, metrics & KPIs do you use to assist with the planning decisions?
- How much is your decision guided by computer systems or data evaluation?
- Do you use qualitative or quantitative measures?
- Do you use secondary sources, TGI or Touchpoints?
- Do you use computer optimization?
- Do you use econometric modelling?
- What role do you think such planning systems have?
- How much do they drive media usage decisions?

Literature check

- How would you define media effectiveness?
- Academic research findings – TV to be one of the most effective – Do you think it is possible to say that any one medium is the most effective?
- How important is assessing media effectiveness in relation to your communications and media planning?
- How do you measure media effectiveness for your campaigns?
- Do you have different measures for different objectives?
- Do you have different measures for different media?
- Do you judge digital and offline media differently?

Unconscious / projective questions

- Thinking of the planning function I would be interested to capture your view on the process that planners undertake
- Process diagrams – which would be most appropriate for a planning framework?
- Which key pointers would you include on a framework?
- Here is a framework that has been derived from previous research, how well does it match your practice? What would you change?
- Would you identify your plans as highly deliberated instructions that require implementation, a guiding shape that is fluid and emergent?
- Media spend – money still migrating to digital channels – is this a reflection of effectiveness?

Confirmation questions

- What role does the client / agency play in planning?
- Do clients / agencies work to the same approach to media strategy formation?
- Do clients / agencies measure effectiveness in the same way as you?
- If you were instructing a graduate trainee how would you describe the media selection decision making process?
- Do you think we are seeing the emergence of a new paradigm within media planning?
- Is there anything you think I have missed?

Closing comments & thank you. Thank you very much for helping me with this and giving up your time. Qualitative research is a highly iterative process, and the questions are likely to develop further as the research develops.

Appendix 12-12: Initial full interview coding for Study 1

Themes & Categories	Strategy Formation
People Overview	1 Briefing done
Agency Type	1 Budget
Peeps Role	2 Objectives
People skills	Brand background
	DR Activation
Approach	KPIs
brand world	Long vs Short term focus
gut feel	Outcomes measurement
	Politics & Influence
Questions	Audience Analysis
Changing Environment	1-2-1 vs GRS
Clients involvement	Journey planning
Digital migration	Segmentation
GDPR & data usage	Channel selection
Media Owner influence	Business case
Paradigms around approach	Competition SoV
Privacy concerns	Contextual
Process steps	Heuristics
Iteration Shapes	Innovation
Qu? Most Effective Medium	Mass vs 1-2-1
Qualitative interpretation	Media Consumption
Research & Insight	On vs Off line
Salutations	Optimisation
Summing up	Programmatic
Measurement	Retargetting
Agnostic Measure	Selection
Analytics	Silos
Attribution	Tools
Compliance	Creative
Data Evaluation	Guiding Models
Data Sources	Ad avoidance - blockers
DR Measures LTV Conv% CPS	AHP etc
Effectiveness	Influence ripples
Efficiency	Reach
Evidence	Synergy
ROI	Testing
Touchpoints	Heuristics
What metrics	Non Optimising
	Optimising
	Strategy vs tactics

Appendix 12-13: Summary of Coding against Interview Sections

Interview section	Question	Topics
Welcome		
Purpose: confirm respondent had read PI, discuss issues, gain consent		
Beginning of core interview Purpose: To identify role of the respondent and understand 'where they are coming from' when developing media Strategy (MS)	- Can you tell me what your role is?	Role
	- Could you summarize the key responsibilities of your role in relation to communications and media planning?	Responsibilities
	- Do you work in any specific field/specialism within the media planning function?	Work focus/specialisation
	- How does it relate to media planning and evaluation?	Involvement with media planning and buying
List of topic headings for discussion: Thinking about the planning function ... could you tell me about:		
Purpose: Identify initial approach: planned /deductive or different?	- Your approach to communications and media planning?	MS Approach
Purpose: Identify level of information / environment analysis that supported the strategy making	- What sort of briefing do you / wish you could get?	Briefing
	- What sort of information do you have access to and start with?	Information needs
	- Is there any other information you wish you could have access to?	
Purpose: Draw connection with suggested complex, turbulent, unpredictable digital environment	- How would you describe the environment you work in? - What are the biggest challenges when approaching a new campaign?	Changes in the Planning Environment & challenges
Purpose: Probe around intuition vs analysis in MS asking different aspects of the same thing from different angles	- When planning, what are the key drivers/big idea that shape your selection of channels and vehicles? - How do you decide which channels to use? - How do you select most effective medium/media for marketing communications task?	Intuition vs analysis
	- What role does intuition play in planning?	Intuition and heuristics
	- How do you apportion budgets to them?	Budgeting
	- What models & theories help shape your plans?	Models & theories
	- What sort of information do you receive to help you make inter-media channel planning decision?	Data sources: client analytics / in-house / industry support
	- What types of measures and metrics do you use to assist with the planning decisions?	Objectives KPIs
Purpose: Identify general level of data involvement in determining MS	- How much is your decision guided by computer systems or data evaluation?	Decision support Optimisation
	- Do you use qualitative or quantitative measures?	Decision support Data sources
	- Do you use secondary sources, TGI or Touchpoints?	Decision support Data sources
	- Do you use computer optimization? - Do you use econometric modelling?	Decision support modelling
Purpose: Identify opinion around decision support / deductive techniques	- What role do you think such planning systems have? How much do they drive media usage decisions?	Decision support modelling
Purpose: Repetition/ confirmation around level of information / environment analysis that supported MS	- Is there other information that you would like to receive that could assist in your planning decisions?	Information needs

Interview section	Question	Topics
Purpose: guided conversation around evaluation, link to objective & future planning, reconfirming some points	<ul style="list-style-type: none"> - How important is assessing media effectiveness in relation to your communications and media planning? - How would you define media effectiveness? - How do you measure media effectiveness of campaigns? - What metrics & KPIs are important to you? - Do you have different measures for different objectives? - Academic research findings – TV one of most effective. Do you think it is possible to say any one medium is most effective? - Do you have different measures for different media? - Do you judge digital & offline media differently? - Do you use qualitative or quantitative measures? - Do you use secondary sources? - Do you use planning tools such as TGI, comScore or touchpoints? - Do you use computer optimization? 	<p>Objectives KPIs Effectiveness Planning sequence Online/offline Optimisation Data sources</p>
Thinking of the planning function I would be interested to capture your view on the process that planners undertake. This section supported with image artefacts		
Purpose: conceptualise the approach/process being described	<ul style="list-style-type: none"> - Process diagrams – which would be most appropriate for a planning framework - Which key pointers would you include on a framework? - Here is a framework derived from previous research, how well does it match your practice? What would you change? 	<p>Process summary Planning sequence Planning frameworks</p>
Purpose: MS&P approach in different language reflecting literature	<ul style="list-style-type: none"> - Would you identify your plans as highly deliberated instructions that require implementation, or a guiding shape that is fluid and emergent? 	<p>Strategy theory MS Approach</p>
Purpose: interrogate online/offline decisions from different perspective	<ul style="list-style-type: none"> - Media spend – money still migrating to digital channels – is this a reflection of effectiveness? 	<p>Online/offline Heuristics</p>
Purpose: identify client/agency factors effecting MS	<ul style="list-style-type: none"> - What role does the client/agency play in planning? - Do clients /agencies work to the same approach to media strategy formation? - Do clients /agencies work to the same definition of media effectiveness as you? - Do clients/agencies measure effectiveness in the same way as you? 	<p>Role of clients Organisational/cognitive bias</p>
Purpose: Support RQ	<ul style="list-style-type: none"> - If you were instructing a graduate trainee how would you describe the media selection decision making process? 	<p>Planning frameworks? Teaching MP?</p>
Purpose: straight out ask them what I am trying to find out	<ul style="list-style-type: none"> - Do you think we are seeing the emergence of a new paradigm within media planning? 	<p>New paradigm</p>
Purpose: concept development	<ul style="list-style-type: none"> - Is there anything you think I have missed? 	<p>Dependent upon answer</p>

Appendix 12-14: Initial coding for Study 2 based on Cowan & Abratt 1999

Name	
Budget Info	
Current budget constraints on the advertising or communications campaign	
Past advertising budgets and media plans of the brand or product	
Communication Planning and Strategy Information	
Information Direct marketing plan and strategy of the brand or product	
Information Public relations and publicity plan and strategy of the brand or product	
Information Sales promotion plan and strategy of the brand or product	
Competitive Info	
Communication strategy of the competitors	
Competitor media expenditure analysis	
Competitors' communication strengths and weaknesses	
Public relations and publicity strategy of the competitors	
Share of voice of the competitor's brand or product	
The direct marketing strategy of the competitors	
The sales promotion strategy of the competitors	
Consumer Behaviour Info	
Consumer buying behaviour of the product category	
Consumption or usage patterns of the brand or product	
Consumption or usage patterns of the product category	
The expected reaction to the advertising message	
Creative Info	
Past advertising themes of the brand or product	
The advertising campaign's creative strategy	
The complexity of the advertising message	
Historic Info	
Historical development of the characteristics of the brand or product	
Historical development of the characteristics of the product category	
Past history of responsiveness to advertising of the brand or product	
Market Size	
Current market share of the brand or product	
Market potential forecasts of the brand or product	
Size of the total market for the product category	
Media Info	
Advertising clutter of the medium or vehicle	
Advertising production costs for various media classes	
Advertising production lead times for various media classes	
Cost per thousand of the media vehicle	
Credibility of the media vehicle	
Editorial environment of the media vehicle	
Longevity of the medium or vehicle	
Media vehicle's primary function (e.g., to entertain, inform, advertise)	
Number of different media classes to be used in the campaign	
Potential or available measures of advertising effectiveness of the medium or vehicle	

Name	
Relationship between the audience and the vehicle	
Reproduction quality of the media vehicle	
The geographic flexibility of the medium	
The production flexibility of the medium	
Traditional and non-traditional media vehicle options available	
Objectives	
Brand or product marketing communication objectives	
Brand or product marketing objectives	
Product & Brand Info	
Current problems facing the product or brand	
The package design of the brand	
Reach & Frequ Info	
Advertising exposure (reach) and continuity (frequency) required	
Average frequency of the media vehicles schedule	
Media vehicle audience exposure (reach)	
Number of sales messages intended to be communicated in the campaign	
Sales Info	
Brand or product sales and distribution strategy	
Customer sales analysis of the brand or product	
Geographical sales patterns of the brand or product	
Month or seasonal sales patterns of the brand or product	
Monthly or seasonal sales patterns of the product category	
Sales forecasts of the brand or product	
Sales history of the brand or product	
The unique selling proposition of the brand or product	
Seq & Targeting	
Brand or product target market demographics (i.e., age, education, income)	
Brand or product target market psychographics (i.e., lifestyle, interests)	
Current market position of the brand or product	
Media vehicle's audience demographics	
Media vehicle's audience psychographics	
Product category user demographics (i.e., age, education, income)	
Product category user psychographics (i.e., lifestyle, interests, self-image)	
Timing Info	
Advertising production lead times for various media classes	
Forthcoming events or activities that might affect the product or brand	
Length of consumer purchasing decision of the product category	
The brand or product life cycle	
The product category life cycle	
Time imperatives for the current advertising campaign	

Appendix 12-15: Q2 Word Frequency Report

Word	Length	Count	Weighted Percentage (%)	Similar Words
budget	6	73	4.51	budget, budgets
objectives	10	64	3.95	objectives
audience	8	57	3.52	audience, audiences
target	6	56	3.46	target, targeting, targets, targetting
data	4	32	1.98	data
info	4	30	1.85	info
kpis	4	29	1.79	kpis
media	5	27	1.67	media
assets	6	24	1.48	assets
campaign	8	24	1.48	campaign, campaigns
creative	8	24	1.48	creative
business	8	22	1.36	business
dates	5	21	1.30	date, dates
brand	5	18	1.11	brand, branding
product	7	18	1.11	product, products
client	6	17	1.05	client, clients
market	6	16	0.99	market, marketing
messaging	9	16	0.99	message, messages, messaging
timings	7	16	0.99	time, times, timing, timings
plans	5	15	0.93	plan, planning, plans
brief	5	14	0.86	brief, briefing, briefs
company	7	14	0.86	company
current	7	13	0.80	current, currently
past	4	13	0.80	past
channels	8	11	0.68	channel, channels
competitive	11	11	0.68	competition, competitive
customer	8	11	0.68	customer, customers
performance	11	11	0.68	performance
platforms	9	11	0.68	platform, platforms
sales	5	11	0.68	sales
segments	8	11	0.68	segmentation, segments
timeframe	9	11	0.68	timeframe

Word	Length	Count	Weighted Percentage (%)	Similar Words
cost	4	10	0.62	cost, costs
etc	3	10	0.62	etc
formats	7	10	0.62	format, formats
success	7	10	0.62	success, successful
use	3	10	0.62	use, used
comms	5	9	0.56	comms
google	6	9	0.56	google
historic	8	9	0.56	historic, historical, historically
response	8	9	0.56	response, responsibilities, responsible
activity	8	8	0.49	activation, activity
background	10	8	0.49	background
key	3	8	0.49	key
research	8	8	0.49	research
stats	5	8	0.49	stats
available	9	7	0.43	availability, available
behaviour	9	7	0.43	behaviour, behavioural
goals	5	7	0.43	goals
information	11	7	0.43	information
insight	7	7	0.43	insight, insights
metrics	7	7	0.43	metrics
overview	8	7	0.43	overview
preferred	9	7	0.43	preferences, preferred
results	7	7	0.43	resultant, results
site	4	7	0.43	site
web	3	7	0.43	web
analysis	8	6	0.37	analysis
competitor	10	6	0.37	competitor, competitors
cpa	3	6	0.37	cpa
full	4	6	0.37	full
get	3	6	0.37	get
idea	4	6	0.37	idea, ideas
like	4	6	0.37	like
look	4	6	0.37	look, looking
obj	3	6	0.37	obj

Word	Length	Count	Weighted Percentage (%)	Similar Words
page	4	6	0.37	page, pages
previous	8	6	0.37	previous, previously
strategy	8	6	0.37	strategies, strategy
trends	6	6	0.37	trend, trends
want	4	6	0.37	want
achieve	7	5	0.31	achieve
content	7	5	0.31	content
length	6	5	0.31	length
rates	5	5	0.31	rates
studies	7	5	0.31	studies
tgi	3	5	0.31	tgi
access	6	4	0.25	access
analytics	9	4	0.25	analytics
broader	7	4	0.25	broader
case	4	4	0.25	case
deals	5	4	0.25	deals
demographics	12	4	0.25	demographics
estimate	8	4	0.25	estimate, estimated
guidelines	10	4	0.25	guidelines
issues	6	4	0.25	issues
keyword	7	4	0.25	keyword, keywords
materials	9	4	0.25	material, materials
measurement	11	4	0.25	measurement
people	6	4	0.25	people
share	5	4	0.25	share
sign	4	4	0.25	sign
statistics	10	4	0.25	statistics
tools	5	4	0.25	tool, tools
tracking	8	4	0.25	tracking
url	3	4	0.25	url, urls
worked	6	4	0.25	work, worked
year	4	4	0.25	year
acquisition	11	3	0.19	acquisition
aims	4	3	0.19	aims
awareness	9	3	0.19	awareness

Word	Length	Count	Weighted Percentage (%)	Similar Words
based	5	3	0.19	based
benchmarks	10	3	0.19	benchmarks
calendars	9	3	0.19	calendar, calendars
consumer	8	3	0.19	consumer
conversion	10	3	0.19	conversion
destination	11	3	0.19	destination
details	7	3	0.19	details
factors	7	3	0.19	factors
find	4	3	0.19	find
industry	8	3	0.19	industries, industry
knowledge	9	3	0.19	knowledge
landing	7	3	0.19	landing
learning	8	3	0.19	learning, learnings
need	4	3	0.19	need
owner	5	3	0.19	owner, owners
partners	8	3	0.19	partner, partners
party	5	3	0.19	party
proposal	8	3	0.19	proposal
roi	3	3	0.19	roi
role	4	3	0.19	role
search	6	3	0.19	search, searching
service	7	3	0.19	service
similar	7	3	0.19	similar
size	4	3	0.19	size
social	6	3	0.19	social
spend	5	3	0.19	spend
trading	7	3	0.19	trading
traffic	7	3	0.19	traffic
types	5	3	0.19	types
understanding	13	3	0.19	understand, understanding
universe	8	3	0.19	universe
user	4	3	0.19	user
3rd	3	2	0.12	3rd
action	6	2	0.12	action
advertising	11	2	0.12	advertising

Word	Length	Count	Weighted Percentage (%)	Similar Words
agency	6	2	0.12	agency
aov	3	2	0.12	aov
biz	3	2	0.12	biz
clear	5	2	0.12	clear
communicate	11	2	0.12	communicate, communicating
consumption	11	2	0.12	consumption
context	7	2	0.12	context
cpc	3	2	0.12	cpc
ctr	3	2	0.12	ctr
database	8	2	0.12	database
deliver	7	2	0.12	deliver, delivering
desk	4	2	0.12	desk
digital	7	2	0.12	digital
documents	9	2	0.12	documents
econometrics	12	2	0.12	econometrics
example	7	2	0.12	example, examples
existing	8	2	0.12	existing
facebook	8	2	0.12	facebook
feedback	8	2	0.12	feedback
flight	6	2	0.12	flight
free	4	2	0.12	free
general	7	2	0.12	general, generally
given	5	2	0.12	given
good	4	2	0.12	good
history	7	2	0.12	history
house	5	2	0.12	house
includes	8	2	0.12	includes, including
know	4	2	0.12	know
kpi	3	2	0.12	kpi
last	4	2	0.12	last
line	4	2	0.12	line
macro	5	2	0.12	macro
mintel	6	2	0.12	mintel
month	5	2	0.12	month
offer	5	2	0.12	offer, offers

Word	Length	Count	Weighted Percentage (%)	Similar Words
office	6	2	0.12	office
offline	7	2	0.12	offline
options	7	2	0.12	options
organisation	12	2	0.12	organisation, organisations
per	3	2	0.12	per
period	6	2	0.12	period
planner	7	2	0.12	planner
potential	9	2	0.12	potential
project	7	2	0.12	project, projections
promotional	11	2	0.12	promotional, promotions
proposition	11	2	0.12	proposition, propositions
regional	8	2	0.12	regional
reports	7	2	0.12	reports
required	8	2	0.12	required
restrictions	12	2	0.12	restrictions
retention	9	2	0.12	retention
seasonality	11	2	0.12	seasonality
second	6	2	0.12	second, secondly
secondary	9	2	0.12	secondary
similarweb	10	2	0.12	similarweb
start	5	2	0.12	start
statement	9	2	0.12	statement, statements
stuff	5	2	0.12	stuff
team	4	2	0.12	team, teams
term	4	2	0.12	term, terms
things	6	2	0.12	things
timeline	8	2	0.12	timeline
video	5	2	0.12	video
vision	6	2	0.12	vision
website	7	2	0.12	website
well	4	2	0.12	well
whats	5	2	0.12	whats
wider	5	2	0.12	wider
able	4	1	0.06	able
acorn	5	1	0.06	acorn

Word	Length	Count	Weighted Percentage (%)	Similar Words
advantage	9	1	0.06	advantage
afford	6	1	0.06	afford
agreements	10	1	0.06	agreements
alikes	6	1	0.06	alikes
allocation	10	1	0.06	allocation
allowable	9	1	0.06	allowable
already	7	1	0.06	already
ambition	8	1	0.06	ambition
anecdotal	9	1	0.06	anecdotal
annual	6	1	0.06	annual
ask	3	1	0.06	ask
assess	6	1	0.06	assess
attitudinal	11	1	0.06	attitudinal
attribution	11	1	0.06	attribution
averages	8	1	0.06	averages
axciom	6	1	0.06	axciom
back	4	1	0.06	back
ballpark	8	1	0.06	ballpark
begin	5	1	0.06	begin
behavioral	10	1	0.06	behavioral
bespoke	7	1	0.06	bespoke
best	4	1	0.06	best
blukai	6	1	0.06	blukai
board	5	1	0.06	board
bought	6	1	0.06	bought
budet	5	1	0.06	budet
built	5	1	0.06	built
buyer	5	1	0.06	buyer
call	4	1	0.06	call
came	4	1	0.06	came
campagin	8	1	0.06	campagin
capability	10	1	0.06	capability
categories	10	1	0.06	categories
centre	6	1	0.06	centre
certain	7	1	0.06	certain

Word	Length	Count	Weighted Percentage (%)	Similar Words
challenges	10	1	0.06	challenges
choice	6	1	0.06	choice
collateral	10	1	0.06	collateral
collected	9	1	0.06	collected
come	4	1	0.06	come
commercial	10	1	0.06	commercial
commissioned	12	1	0.06	commissioned
complete	8	1	0.06	complete
console	7	1	0.06	console
contextual	10	1	0.06	contextual
contractual	11	1	0.06	contractual
cookie	6	1	0.06	cookie
core	4	1	0.06	core
courses	7	1	0.06	courses
cpl	3	1	0.06	cpl
cpms	4	1	0.06	cpms
create	6	1	0.06	create
crm	3	1	0.06	crm
delivery	8	1	0.06	delivery
demand	6	1	0.06	demand
desired	7	1	0.06	desired
direct	6	1	0.06	direct
discussions	11	1	0.06	discussions
display	7	1	0.06	display
diverse	7	1	0.06	diverse
drive	5	1	0.06	drive
dsp	3	1	0.06	dsp
due	3	1	0.06	due
ecrm	4	1	0.06	ecrm
effectiveness	13	1	0.06	effectiveness
email	5	1	0.06	email
engagement	10	1	0.06	engagement
environment	11	1	0.06	environment
envisage	8	1	0.06	envisage
evaluation	10	1	0.06	evaluation

Word	Length	Count	Weighted Percentage (%)	Similar Words
event	5	1	0.06	event
evidence	8	1	0.06	evidence
expected	8	1	0.06	expected
failure	7	1	0.06	failure
final	5	1	0.06	final
financial	9	1	0.06	financial
focus	5	1	0.06	focus
framework	9	1	0.06	framework
going	5	1	0.06	going
government	10	1	0.06	government
great	5	1	0.06	great
growth	6	1	0.06	growth
gwi	3	1	0.06	gwi
hit	3	1	0.06	hit
impact	6	1	0.06	impact
important	9	1	0.06	important
increase	8	1	0.06	increase
influences	10	1	0.06	influences
inputs	6	1	0.06	inputs
interest	8	1	0.06	interest
internet	8	1	0.06	internet
intuition	9	1	0.06	intuition
investments	11	1	0.06	investments
involved	8	1	0.06	involved
iwth	4	1	0.06	iwth
just	4	1	0.06	just
kantar	6	1	0.06	kantar
known	5	1	0.06	known
landscape	9	1	0.06	landscape
leaders	7	1	0.06	leaders
leanings	8	1	0.06	leanings
liek	4	1	0.06	liek
listening	9	1	0.06	listening
long	4	1	0.06	long
lot	3	1	0.06	lot

Word	Length	Count	Weighted Percentage (%)	Similar Words
lotame	6	1	0.06	lotame
main	4	1	0.06	main
making	6	1	0.06	making
management	10	1	0.06	management
mandatory	9	1	0.06	mandatory
marketplace	11	1	0.06	marketplace
may	3	1	0.06	may
mediatel	8	1	0.06	mediatel
meet	4	1	0.06	meet
mission	7	1	0.06	mission
mix	3	1	0.06	mix
mkt	3	1	0.06	mkt
national	8	1	0.06	national
netbase	7	1	0.06	netbase
new	3	1	0.06	new
next	4	1	0.06	next
normally	8	1	0.06	normally
now	3	1	0.06	now
nrs	3	1	0.06	nrs
ons	3	1	0.06	ons
optimising	10	1	0.06	optimising
oracle	6	1	0.06	oracle
orders	6	1	0.06	orders
otherwise	9	1	0.06	otherwise
outcome	7	1	0.06	outcome
overall	7	1	0.06	overall
pans	4	1	0.06	pans
patterns	8	1	0.06	patterns
perceived	9	1	0.06	perceived
pew	3	1	0.06	pew
plus	4	1	0.06	plus
portfolio	9	1	0.06	portfolio
positioning	11	1	0.06	positioning
possible	8	1	0.06	possible
ppc	3	1	0.06	ppc

Word	Length	Count	Weighted Percentage (%)	Similar Words
precious	8	1	0.06	precious
problems	8	1	0.06	problems
process	7	1	0.06	process
profiles	8	1	0.06	profiles
provide	7	1	0.06	provide
publisher	9	1	0.06	publisher
quite	5	1	0.06	quite
rational	8	1	0.06	rational
rationale	9	1	0.06	rationale
recently	8	1	0.06	recently
recommendations	15	1	0.06	recommendations
relationships	13	1	0.06	relationships
rely	4	1	0.06	rely
reponse	7	1	0.06	reponse
resonates	9	1	0.06	resonates
resource	8	1	0.06	resource
responding	10	1	0.06	responding
right	5	1	0.06	right
round	5	1	0.06	round
run	3	1	0.06	run
schedule	8	1	0.06	schedule
scope	5	1	0.06	scope
sector	6	1	0.06	sector
see	3	1	0.06	see
setting	7	1	0.06	setting
side	4	1	0.06	side
significant	11	1	0.06	significant
sits	4	1	0.06	sits
situation	9	1	0.06	situation
solution	8	1	0.06	solution
sometimes	9	1	0.06	sometimes
speak	5	1	0.06	speak
specialists	11	1	0.06	specialists
specific	8	1	0.06	specific
split	5	1	0.06	split

Word	Length	Count	Weighted Percentage (%)	Similar Words
staff	5	1	0.06	staff
stakeholders	12	1	0.06	stakeholders
stands	6	1	0.06	stands
state	5	1	0.06	state
steer	5	1	0.06	steer
strategic	9	1	0.06	strategic
strongest	9	1	0.06	strongest
suite	5	1	0.06	suite
supplier	8	1	0.06	supplier
surprisingly	12	1	0.06	surprisingly
talk	4	1	0.06	talk
tend	4	1	0.06	tend
therefore	9	1	0.06	therefore
thought	7	1	0.06	thought
throughout	10	1	0.06	throughout
timeperiod	10	1	0.06	timeperiod
toolkit	7	1	0.06	toolkit
top	3	1	0.06	top
touchpoints	11	1	0.06	touchpoints
trying	6	1	0.06	trying
ultimately	10	1	0.06	ultimately
usage	5	1	0.06	usage
usp	3	1	0.06	usp
usually	7	1	0.06	usually
vague	5	1	0.06	vague
vcr	3	1	0.06	vcr
vendor	6	1	0.06	vendor
via	3	1	0.06	via
view	4	1	0.06	view
viewerslogic	12	1	0.06	viewerslogic
visits	6	1	0.06	visits
volume	6	1	0.06	volume
warc	4	1	0.06	warc

Word	Length	Count	Weighted Percentage (%)	Similar Words
way	3	1	0.06	way
within	6	1	0.06	within
words	5	1	0.06	words

