

Accountability:

How Media Drive Results and Impact Online Success

purchase intent

web search

awareness

message association

web traffic

consideration

brand favorability

Accountability II

How Media Drive Results and Impact Online Success

“The advertising dollar has never been more scrutinized, measured and quantified than it is today. What was once a bottomless pit of marketing capital emptied into the hands of advertising mavens, today’s advertising dollar is being doled out with expectations for a tangible return on investment.”

— Thomas Banks, CEO, FlexSCAN, *Health Business Week*, August 24, 2007

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Introduction

“If the 20th century was known in marketing circles as the advertising century, the 21st may be the advertising measurement century.”

— Stuart Elliott, *The New York Times*, February 22, 2007

Every business wants to optimize its return on investment. Consequently, accountability remains one of the most vital topics in marketing today. As marketing executives continue to refine the methods they use to measure results, they are able to understand the effects and costs of different elements of their marketing programs. The learning can guide them to fine tune their efforts in order to get the greatest “bang for the buck.”

As a result of the greater emphasis on accountability, marketers and the advertising, media, and research communities are conducting an array of studies to find out which media and media combinations deliver the best results. The previously issued **Accountability: A Guide to Measuring ROI and ROO Across Media** (www.magazine.org/accountability) provided an accessible overview of accountability: what it is, how it is measured and findings.

This sequel, **Accountability II: How Media Drive Results and Impact Online Success**, gathers together a wealth of new information on accountability—overall and by product category—that has recently been released from a number of researchers and organizations, including:

- Advertiser Perceptions
- Affinity, LLC
- American Advertising Foundation
- BIGresearch
- CNW Research
- Condé Nast Publications
- Dynamic Logic/Millward Brown
- JupiterResearch
- Marketing Evolution
- Mediamark Research Inc.
- Meredith Corporation
- Online Publishers Association
- Starcom MediaVest Group, Inc.

Accountability II: How Media Drive Results and Impact Online Success takes a look at recent media-neutral research and offers insights on:

- How media perform throughout the purchase funnel from brand awareness to purchase intent—overall and for specific product categories
- How media influence consumer visits and searches on the web to drive online results

Additional studies will continue to shed light on accountability. To stay up to date with new research as it is released, please visit www.magazine.org/accountability. This site is dedicated to furthering understanding about marketing accountability. More information on the studies in this guide, including their methodologies, are also available at this address.

Executive Summary

“It’s great to see that for the exact same product, a company can go from getting it wrong to reevaluating its marketing, changing it, and then getting it right and becoming a success.”

— Rex Briggs and Greg Stuart,
What Sticks: Why Most Advertising Fails and How to Guarantee Yours Succeeds

The third-party findings gathered in **Accountability II: How Media Drive Results and Impact Online Success** offer insights on purchase funnel dynamics and consumer online behavior that can have profound ramifications for advertisers looking to maximize their return on marketing investment.

When looking across research that examines consumers’ purchase decision-making process (a.k.a. “the purchase funnel”), overall findings indicate that:

- **Media synergy is important: In general, more media get better results**
- **TV and magazines in combination drive awareness most effectively**
- **Magazines excel at driving purchase intent, i.e., they are the most effective medium at the bottom of the purchase funnel**
- **Through all stages of the purchase funnel, magazines perform the most consistently**
- **Magazines and online are usually the most efficient drivers**
- **These patterns generally hold true across product categories**

Recent accountability research has also found that a number of factors influence consumers’ web behavior. Their findings show that:

- **Offline media perform well in driving web traffic and search—often better than online media**
- **Media synergy is important, although each medium influences online behavior differently and plays a distinctive role**
- **“Qualified” search offers quite different and informative results than “total” search results, which is where advertisers tend to focus**
- **When looking at the role individual media play in driving web results, magazines most consistently drive web traffic and search**

“In my mind, the primary objective of ‘marketing accountability’ is to improve the productivity of the entire marketing supply chain to better discern what works and what doesn’t work, so that we can

- *Build brand equity*
- *Drive short-term business results*
- *Enhance long-term performance potential*
- *Streamline and increase the productivity of the marketing process*
- *Improve the marketing decision-making process across all platforms”*

— Bob Liodice, President, Association of National Advertisers, September 10, 2007

Media That Drive Effectiveness Through the Purchase Funnel

The way to... great results, is not to run away from accountability but to embrace it."

— Howard Draft, CEO DraftFCB, *The New York Times*, April 20, 2007

A number of researchers have performed ground-breaking work examining which media and media combinations deliver results at each stage of the purchase funnel. The importance placed on each stage of the purchase funnel varies by marketer depending on the program's objective, although purchase intent tends to be the metric of greatest importance.

Two companies have made aggregations of client-commissioned cross-media accountability studies publicly available:

- **Dynamic Logic/Millward Brown** aggregated cross-media accountability data from 32 studies from 2003 through 2007
- **Marketing Evolution** aggregated cross-media accountability data from 20 studies from late 2004 through mid-2006

Both companies compared the effects of television (network, syndication, cable and/or spot), consumer magazines and online (banners and rich media). TV was the dominant medium used by marketers across the aggregated studies. Independently, each company found similar results for media performance.

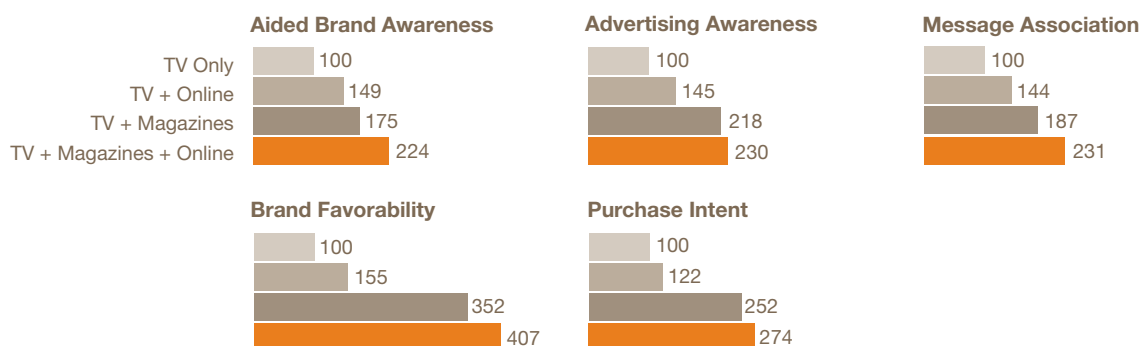
The Importance of Media Synergy

Dynamic Logic's 32-study aggregation reveals that media synergy—media working together—was important for getting results across the purchase funnel from brand awareness through to purchase intent. Dynamic Logic's analysis revealed that:

- **Three media were better than two, and two media were better than one in generating results**
- **The combination of TV and magazines provided significantly more lift (versus TV alone) than did TV plus online**

Cumulative Effects of Different Media Combinations

Pre/Post Point Change (Index Versus TV Alone)



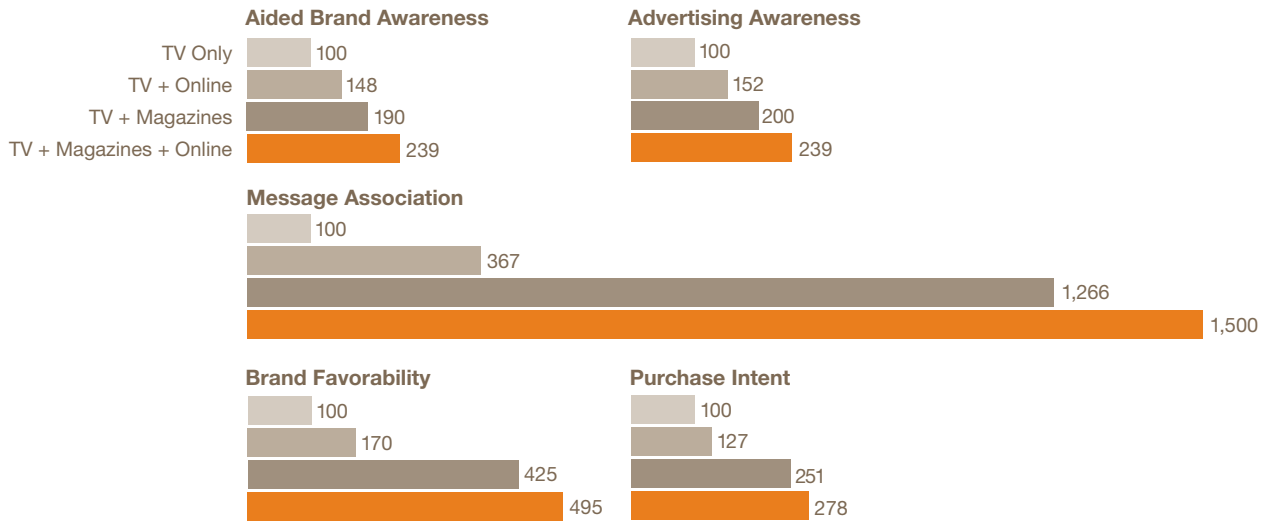
Note: Results reflect the impact of different media combinations expressed as an index with TV as the base medium. Results are an aggregate of 32 studies.

Source: Dynamic Logic/Millward Brown CrossMedia Research, 2004 – 2007

Results from Dynamic Logic's 15 most recent studies (2006-2007) mirrored those of the full 32 study aggregation.

Cumulative Effects of Different Media Combinations

Pre/Post Point Change (Index Versus TV Alone)



Note: Results reflect the impact of different media combinations expressed as an index with TV as the base medium.

Results are an aggregate of 15 studies.

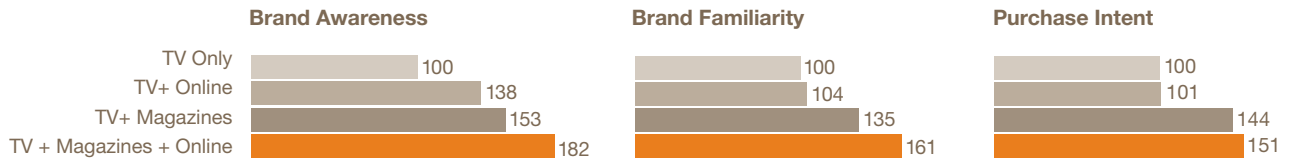
Source: Dynamic Logic/Millward Brown CrossMedia Research, 2007

Marketing Evolution found similar results:

- **Three media got better results than two.** However, the combination of TV and online did not significantly lift effectiveness versus TV alone in two of the three stages studied
- **TV and magazines together were the more effective combination of two media at all stages studied**

Cumulative Effects of Different Media Combinations

Pre/Post Point Change (Index Versus TV Alone)



Note: Results reflect the impact of different media combinations expressed as an index with TV as a base medium. Results are an aggregate of 20 studies, 10 of which had sufficient sample size to examine each combination of media (index versus TV alone).

Source: Marketing Evolution, 2006

Media That Drive Brand Awareness

Dynamic Logic and Marketing Evolution both found that when looking at each medium's contribution to brand awareness, **TV produced the largest increase in brand awareness— with magazines also providing a significant boost.**

Aided Brand Awareness

Magazines

5.7

TV

7.6

Online

3.7

Base 32 studies
Source: Dynamic Logic/Millward Brown
2004 – 2007



Total Brand Awareness

Magazines

44%

50%

6

Television

34%

43%

9

Online

45%

47%

2

0 10 20 30 40 50

Note: Results reflect the average point lift for each medium across the 20 studies.
Source: Marketing Evolution 2006

Media That Drive Ad Awareness

Dynamic Logic found that magazines, TV and online each contributed to increased ad awareness. **TV and magazines produced the greatest lifts in ad awareness, with each medium contributing significantly more impact than online.**

In Marketing Evolution's studies, **TV and magazines also generated the highest increases in ad awareness. In their studies, however, magazines outperformed TV.**

Ad Awareness

Magazines

8.3

TV

9.8

Online

4.4

Base 32 studies
Source: Dynamic Logic/Millward Brown
2004 – 2007



Advertising Awareness

Magazines

48%

57%

9

Television

32%

44%

7

Online

57%

60%

3

0 10 20 30 40 50 60

Note: Results reflect the average percentage point increase for each medium across the 6 studies in which advertising awareness was studied.
Source: Marketing Evolution 2006

Media That Drive Attitude Shifts

Dynamic Logic and Marketing Evolution each looked at interim stages of the purchase funnel between awareness and purchase intent where attitudes about a brand can shift. Dynamic Logic studies message association and brand favorability, while Marketing Evolution examines brand familiarity and brand imagery. (See “How Is the Purchase Funnel Defined?” on pages 29–30 for more information.) Findings showed that:

- For three of these stages—message association, brand familiarity and brand imagery —magazines and TV were the primary drivers with relatively equal contribution
- When it comes to brand favorability, Dynamic Logic found that magazines produced the highest impact, more than double that of TV and more than four times that of online

Point Difference Between Exposed and Non-exposed Consumers

Message Association

point difference



Source: Dynamic Logic/Millward Brown 2004-2007

Brand Favorability

point difference



Source: Dynamic Logic/Millward Brown 2004-2007

Brand Familiarity

point difference



Source: Marketing Evolution 2006

Brand Imagery

point difference

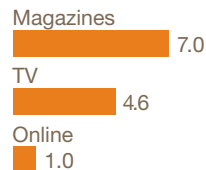


Source: Marketing Evolution 2006

Media That Drive Purchase Intent

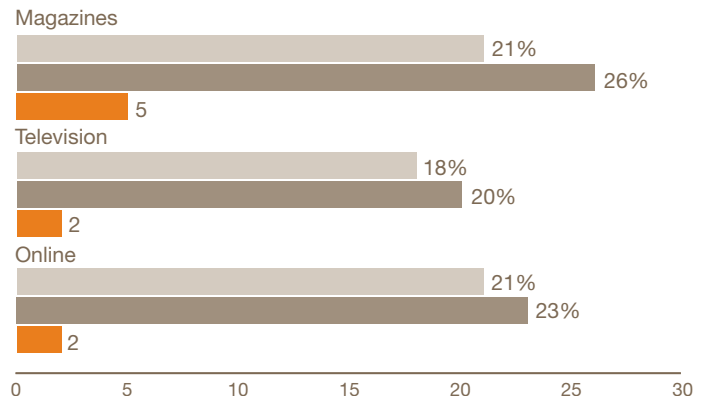
Marketing Evolution and Dynamic Logic found that **when it came to increasing purchase intent**—often considered the most important stage of the purchase funnel—**magazines were by far the most effective—with a significantly greater point increase compared to the next highest ranking medium in both studies.**

Purchase Intent



Base 32 studies
Source: Dynamic Logic/Millward Brown 2004 – 2007

Purchase Intent



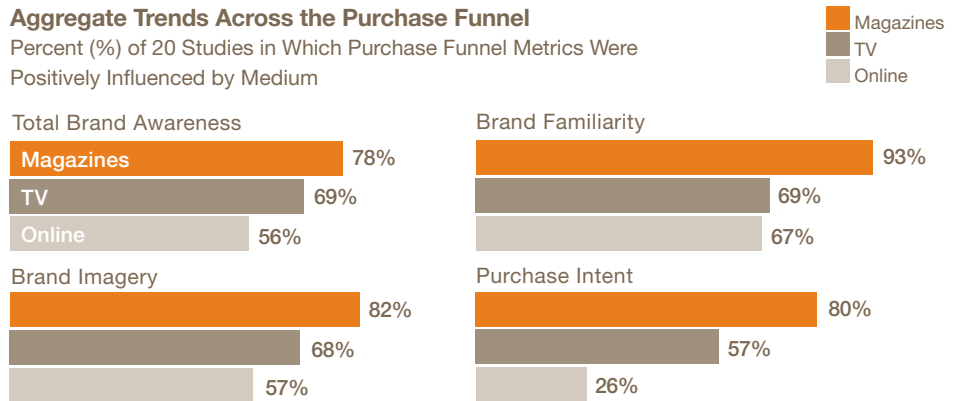
Note: Results reflect the average point lift for each medium across the 20 studies.
Source: Marketing Evolution 2006

Media That Deliver Results Consistently

It's vital for advertisers to feel secure in their media decisions; consequently, consistent performance provides key information. Marketing Evolution found that **magazines performed the most consistently—producing positive results in the most campaigns—through all stages of the purchase funnel.**

Aggregate Trends Across the Purchase Funnel

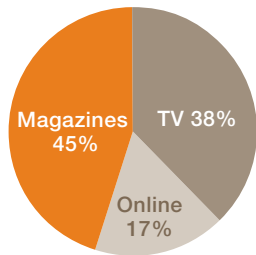
Percent (%) of 20 Studies in Which Purchase Funnel Metrics Were Positively Influenced by Medium



Note: Not all studies included each purchase funnel metric for every media.
Source: Marketing Evolution, 2006

Similarly, from brand awareness through to purchase intent, Dynamic Logic's 32-brand analysis showed that **magazines were the most consistent performer**, followed by TV. Magazines contributed 45% of overall effects, and television provided 38%.

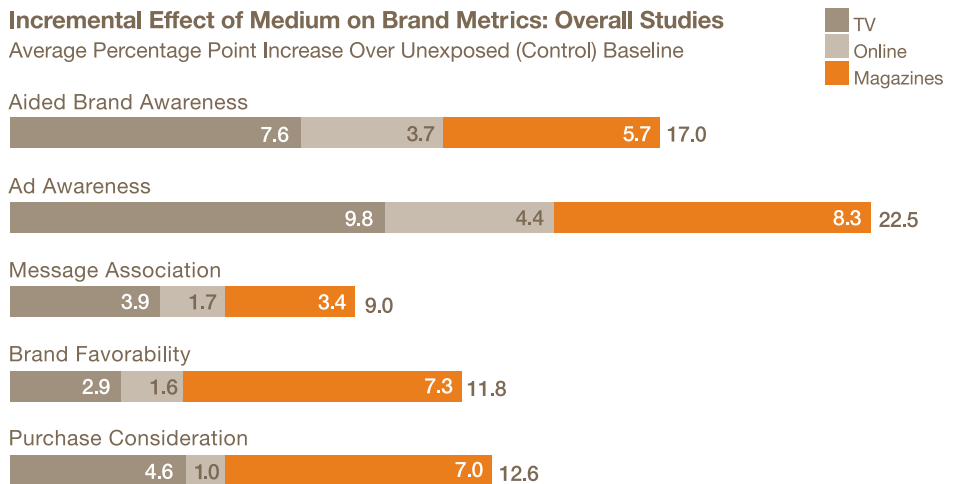
Incremental Effect Across Purchase Funnel



Base: 32 Studies
Source: Dynamic Logic/Millward Brown CrossMedia Research Studies 2004 – 2007

Incremental Effect of Medium on Brand Metrics: Overall Studies

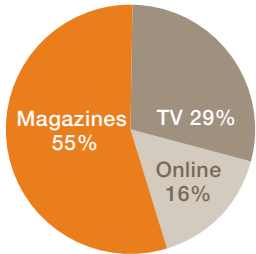
Average Percentage Point Increase Over Unexposed (Control) Baseline



Base: 32 Studies
Source: Dynamic Logic/Millward Brown CrossMedia Research Studies 2004 – 2007

Dynamic Logic's results held true when looking at the 15 studies conducted in 2006-2007. **Magazines again were the most consistent performer across the purchase funnel** followed by TV, with 55% of effectiveness contributed by magazines and 29% by television.

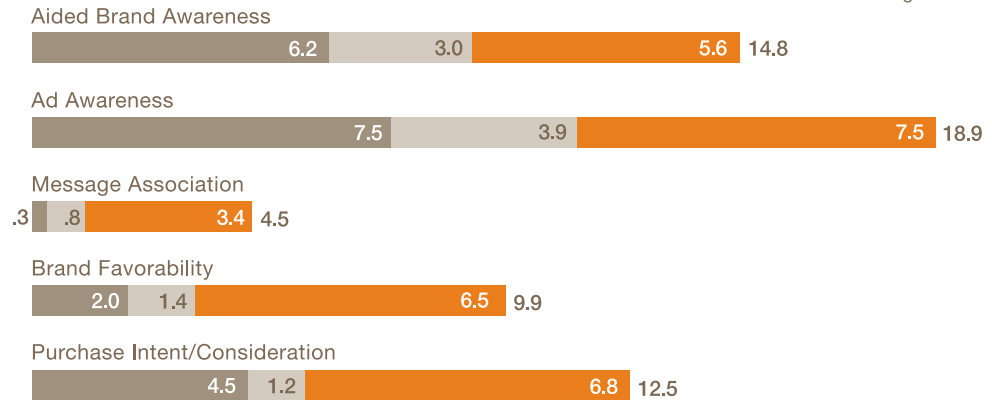
Incremental Effect Across Purchase Funnel



Base: 15 Studies
Source: Dynamic Logic/Millward Brown CrossMedia Research Studies 2004 – 2007

Incremental Effect of Medium on Brand Metrics: 2007 Studies

Average Percentage Point Increase Over Unexposed (Control) Baseline



Base: 15 Studies
Source: Dynamic Logic/Millward Brown CrossMedia Research Studies 2007

Media Impact on Efficiency

While effectiveness is important, knowing how much each medium returned for its investment is also a key consideration for advertisers. For the 32-study aggregation, Dynamic Logic did not provide ROI data, either because ROI was not part of the analyses or was not comparable across all studies. However, reasonable conclusions can still be made from available data.

Dynamic Logic stated that television represented the dominant share of spending for the 32 cases. Based on this, **magazines were more efficient than TV, given that they accounted for a greater contribution to overall effects (45%) than TV (38%) despite lower spending.**

For many of the accountability studies it conducted, Marketing Evolution made recommendations to marketers to reallocate their media mix. They advised that:

- Share of spending for magazines should increase as much as 30 points in 11 of the 16 studies
- Share of spending for online should increase as much as 10 points in 7 of the 16 studies
- Share of spending for TV should increase as much as 10 points in 3 of the 16 studies

When marketers implemented the recommended reallocation of media, their average return on investment (ROI) increased 23% at comparable budget levels.

How Media Drive Online Success

As consumer activity on the web increases, marketers are making the Internet a more important element in their marketing plans, seeking to drive consumers to their websites. As a result, web traffic and search results are increasingly regarded as measures of marketing success. A number of surveys have documented the role that various online and offline media play in affecting consumer online behavior, including:

- The role of media in driving online traffic, search and purchase behavior
- The role of media in driving consumer response to online video ads

How Media Drive Web Traffic

Research that looked at how media affect online results demonstrates that:

- **Traditional media play a critical role in driving web traffic and search**, even when URL addresses are often missing or not prominently displayed in offline ads
- **Looking at qualified search—those consumers ready to make a purchase—paints a different picture of media usage than total search**, which is most often the focus of advertisers
- **Print media, especially magazines, excel in all areas studied**

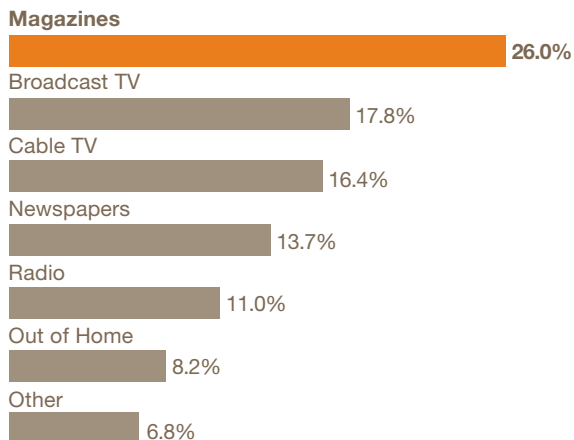
“As somebody who’s ultimately paying the bills, what I’m looking for is accountability.”

— Donna Campanella,
Executive Director of Global Media,
Avon, *Advertising Age*, May 7, 2007

What Marketers Think

A survey by the American Advertising Federation (AAF) sought to find out which media marketers considered most effective for driving traffic to advertisers’ websites or other web-based marketing sites, such as those related to online promotions/offers. **Marketers selected magazines as the most effective in driving consumers online**—more than eight percentage points higher than broadcast TV and roughly ten percentage points higher than cable TV, the second and third highest rated media.

Effectiveness of Media at Driving Consumers to the Web



Source: ICOM, American Advertising Federation (AAF) 2006

Quantifying How Magazines Build Web Traffic

Marketing Evolution aggregated nine studies conducted since 2004 that had quantifiable data on web visits to examine how magazine ads contributed to building web traffic. Importantly, their analysis looked at what consumers do versus what they say they will do. (Marketing Evolution did not analyze multiple media given significant differences in creative approaches by medium.) The product categories included automotive, consumer electronics, health and beauty, and entertainment brands. Only automotive had sufficient data to be studied separately.

The analysis compared the number of online visits among consumers who saw magazine ads (an exposed group) to consumers who read different issues of the same magazines without any exposure to the ads (the control group). The difference in percentage between control group (non-exposed) visits and exposed group visits is the measure attributed to magazine advertising effectiveness.

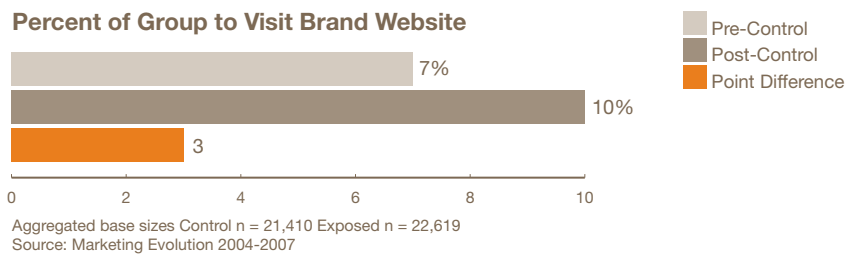
From the aggregated results of these nine studies, Marketing Evolution made three key findings regarding the contribution of magazines to building web traffic:

- **Magazine ads had a major impact on building web traffic**
- **Magazine ads generated web traffic at each stage of the purchase funnel, especially purchase intent**
- **Including a URL address in magazine ads significantly increased web visits**

How Magazine Ads Build Web Traffic Overall

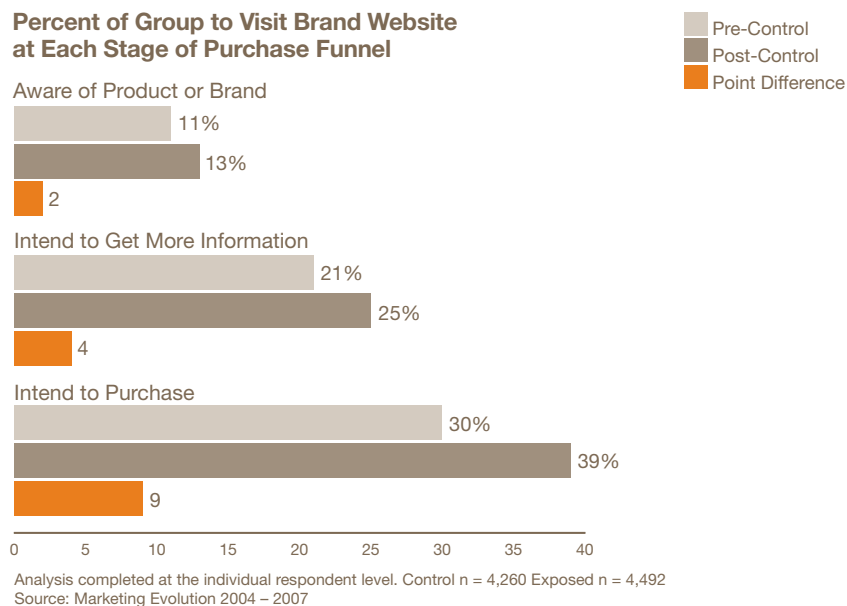
More than a 40% lift in web traffic occurred across all nine studies after consumers were exposed to magazine advertisements compared to a control group of respondents who were not exposed to advertising. This increase represented more than one million unique visitors per brand.

Graph interpretation: If 1,000 people saw the magazine ad, seventy of these people visited the brand's website without being exposed to the magazine ads. In the group exposed to magazine ads, 100 of the 1,000 people visited the website. The incremental 43% (three point) lift was due to the magazine ad exposure.



How Magazine Ads Build Web Traffic Across the Purchase Funnel

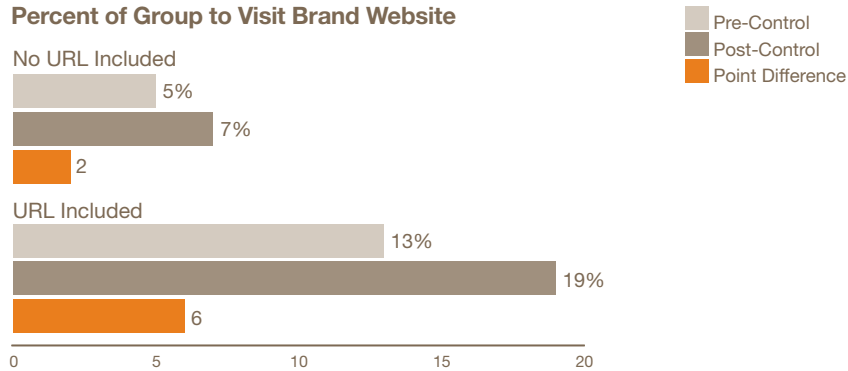
Magazines contributed across the purchase funnel, especially excelling at influencing purchase intent, often considered the most important stage. These results parallel those seen in overall purchase funnel analysis where magazines' strengths are evident throughout the purchase funnel, particularly in increasing purchase intent.



Including a URL in Magazine Ads Increases Web Visits

Despite the statistically significant impact of magazine advertising on web traffic in the nine aggregated studies, less than half included a web address (URL) in the ad. **When the URL was included in the magazine advertising creative, the percent change in visits tripled from two to six points.**

Percent of Group to Visit Brand Website



Analysis completed at the study level. 4 studies include URL and 5 studies do not include URL.
 Aggregated base sizes Control n = 21,410 Exposed n = 22,619
 Source: Marketing Evolution 2004 – 2007

Note: For automotive-specific findings on how magazine ads build web traffic, please see automotive section on page 16.

How Media Drive Web Search

Media That Prompt Online Searches for Merchandise

BIGresearch conducted a study for the Retail Advertising and Marketing Association (RAMA) to help advertisers understand which media perform best at influencing consumers to start a search for merchandise online. The results show:

- **Offline media generally ranked ahead of online media and word-of-mouth: print and TV sites took the top four spots**
- **Magazines prompted web searches more than any other medium**
- **Results generally held true by gender and age**

Top 10 Media that Trigger an Online Search (Adults 18+)

Medium (percent)	Overall	M	F	18–24	25–34	35–44	45–54	55–64	65+
Magazines	52%	52%	51%	60%	56%	50%	48%	50%	48%
TV/Broadcast	44	47	41	45	46	45	45	45	39
Newspapers	41	42	40	30	34	40	43	49	52
TV/Cable	36	40	31	55	45	35	30	28	24
Face-to-Face	35	39	32	49	40	37	33	31	24
E-mail Advertising	30	30	31	37	33	30	29	29	26
Direct Mail	29	28	31	26	29	30	30	31	30
Radio	28	32	25	31	35	30	27	24	20
Internet Advertising	27	31	24	41	33	26	25	23	18
Outdoor	11	12	10	16	16	11	11	8	5

Source: BIGresearch, July 2007, for the Retail Advertising & Marketing Association. (Sample Size: 15,439, age 18+)

Media That Drive Prospects to Search: Total and Qualified

JupiterResearch conducted a study on behalf of the search engine marketing firm iProspect to gain a better understanding of how exposure to offline channels influences search and purchase behavior of search engine users. In the study, two out of three search engine users said that they initiated their search for a company, product, or service because of an offline ad. **Television and magazine/newspaper ads led results**, far outpacing radio and out-of-home ads.

JupiterResearch took the research a step further by finding out which media that prompted searches resulted in a purchase. It found that two out of five online search users (39%) who perform a search as a result of exposure to advertising in an offline channel end up making a purchase as a result of that search. **Magazine and newspaper ads were the most influential media at generating qualified traffic (based on the percent making a purchase after conducting a search)** compared to TV, radio or out-of-home, which produced relatively similar results.

Sources That Prompted an Online Search

	%
Television Ad	37
Magazine/Newspaper Ad	30
Radio Ad	17
Billboard/Indoor/Sports Venue Sign	9

Source: JupiterResearch, 2007

Offline Sources that Drive Qualified Traffic to Websites

	%
Made purchase after conducting an online search	39
Magazine/Newspaper Ad	30
Television Ad	23
Radio Ad	22
Billboard/Indoor/Sports Venue Sign	19

Source: JupiterResearch, 2007

Offline Media Users' Behavior on the Web

Multimedia data from Mediamark Research, Inc. (MRI) provide additional perspective on using offline media to drive online behavior. The information, based on examining heavy usage of offline media, show that **print media users, led by magazines, are more likely than users of other offline media to take action by seeking information and making purchases on the Internet.**

Likelihood of Buying and Searching Online by Medium

	Indices versus Total U.S. Adults (100)			
	Heavy Magazine Readers	Heavy Newspaper Readers	Heavy Radio Listeners	Heavy Television Viewers
Obtained in Past 30 Days:				
Information for new or used car purchase	171	121	122	69
Childcare or parenting information	200	111	92	79
Medical information	154	144	96	79
Information about real estate	152	138	106	55
Financial information or tracked investments or traded stocks/bonds or mutual funds	141	135	95	59
Make a purchase for business use	154	138	112	47
Make a purchase for personal use	138	126	99	57
Downloaded music	174	105	112	66
Downloaded podcasts/podcasting	173	138	71	49

Source: MRI, Fall 2006

How Media Drive Consumer Response to Online Video Ads

Research consistently shows that offline media drive consumers to the web and prompt them to take action, but what about the websites of offline media? A survey conducted by the Online Publishers Association (OPA) asked online users what action(s) they have taken as a result of viewing an online video ad on a variety of sites. OPA's results show that:

- **Offline media-branded websites—such as magazine and national newspaper sites and national broadcast and cable TV sites—ranked in four of the top five website categories** studied at driving viewers to take some kind of action as a result of viewing an online video ad
- **Magazine sites consistently outperformed the other media sites**, including in such critical actions as checking out a company website, going to a store to check out the product and calling a toll-free number

Actions Taken From Viewing Online Video Ads

Medium (percent)	Checked out company websites	Searched for info	Clicked on banner ad	Talked to friends and family	Went to store to check product	Requested more info	Signed up for a product trial	Called toll-free number
Magazine Sites	45	38	30	27	29	28	18	14
Online-Only News + Info	42	35	29	22	26	23	16	10
Natl. Newspaper Sites	40	37	25	23	22	23	15	10
Natl. Broadcast TV Sites	38	31	25	22	19	19	12	7
Cable TV Sites	38	30	25	22	20	19	12	8
Portals	37	34	25	27	24	23	14	10
User-Generated Sites	35	24	20	18	14	14	9	5

Source: Online Publishers Association, June 2007

Media Effectiveness Across Product Categories

A number of studies reveal that media perform differently within individual categories. The categories examined here include: Automotive, Electronics, Entertainment, Home Improvement, Packaged Goods, Pharmaceutical and Retail.

For each of these categories, public data—both aggregated studies and case histories—were used to look at the performance of three media: TV, magazines, and online. Aggregated database findings were examined as well as individual case studies. Slight variations were found in each of the analyses; however, in general, category-specific findings underscored findings from the overall studies:

- **Media synergy is important: In general, more media get better results**
- **TV and magazines in combination drive awareness most effectively**
- **Magazines excel at driving purchase intent, i.e., they are the most effective medium at the bottom of the purchase funnel**
- **Through all stages of the purchase funnel, magazines perform the most consistently**
- **Magazines and online are usually the most efficient drivers**

Automotive

A wealth of accountability data exist for the automotive category. This section examines:

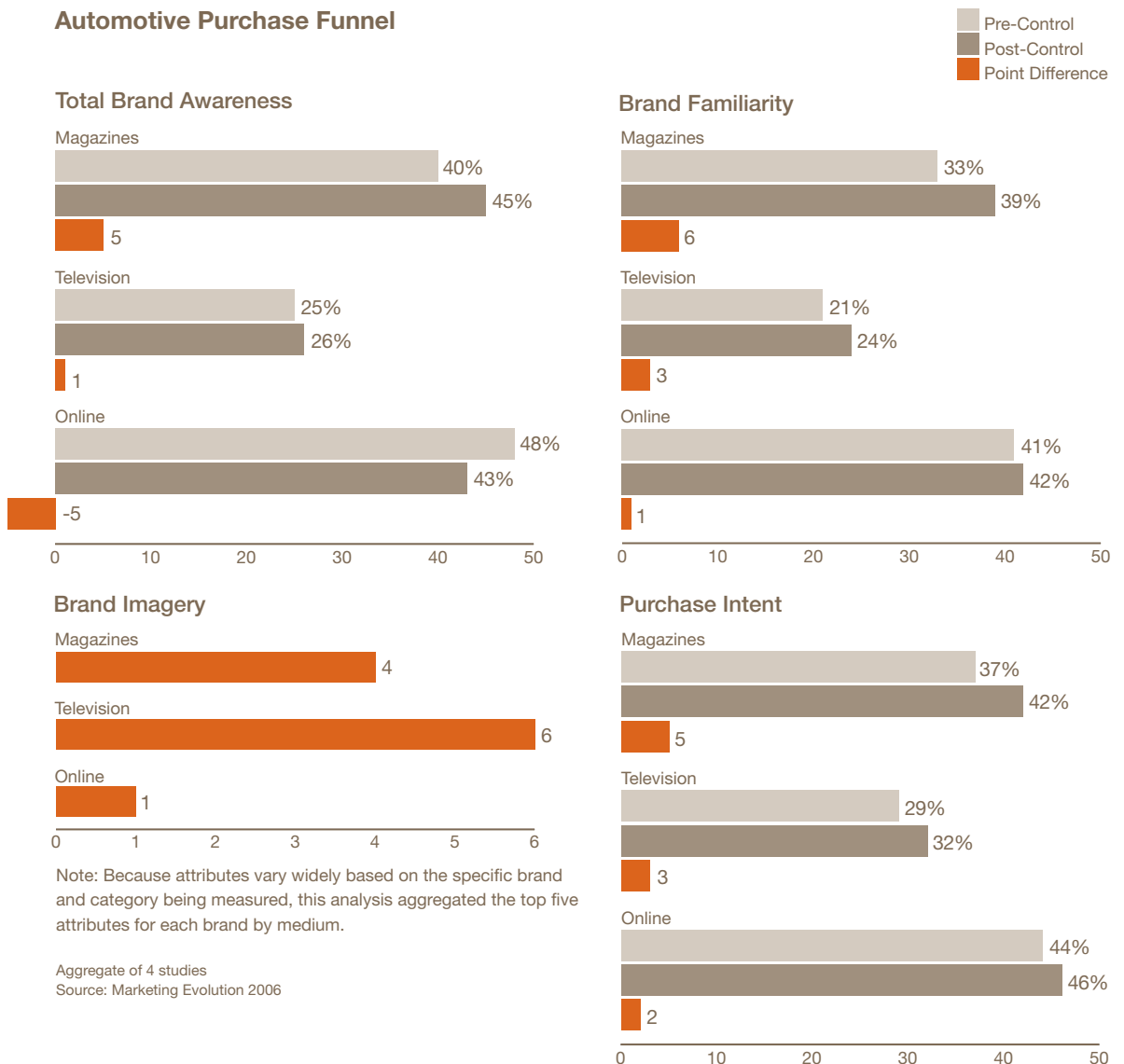
- Findings from cross-media accountability studies
- How media drive online success

Cross-media Studies: Aggregated Analysis

In its aggregation of cross-media accountability automotive studies, Marketing Evolution found:

- **With the exception of brand awareness, each medium contributed throughout the purchase funnel**
- **Magazines delivered the highest point changes in the brand awareness, brand familiarity, and purchase intent stages of the purchase funnel**
- **At the brand imagery stage, television yielded the highest average increases**

Automotive Purchase Funnel



Case Studies

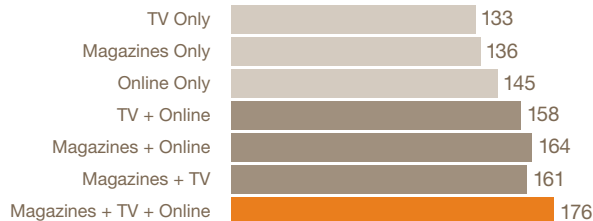
Jeep Compass

Dynamic Logic examined cross-media effectiveness for an advertising campaign developed to launch the Jeep Compass. When looking at which medium most often improved results, **magazines alone or magazines working synergistically with other media—usually online—most consistently yielded positive results across the purchase funnel.**

- For both brand awareness and ad awareness, the combination of all three media produced the highest increase, with the combination of magazines and online coming in second
- The combinations of magazines plus online and magazines plus TV produced the highest—and equal—levels of message association
- All three media combined and magazines plus TV performed equally in producing brand favorability, with magazines plus online coming in not far behind
- All three media combined produced the most purchase intent with the combination of magazines plus online generating the second highest level

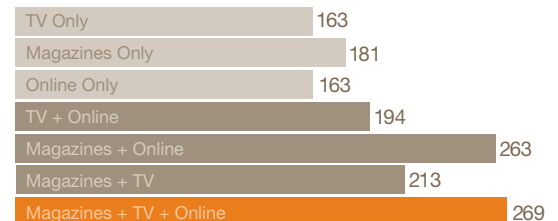
Aided Brand Awareness

Have you heard of the following vehicles?
(Please note both make and model.)



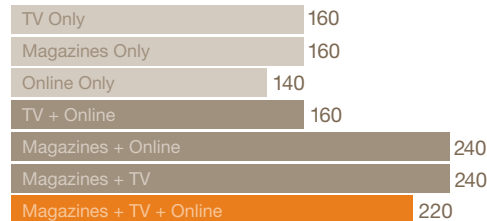
Aided Advertising Awareness

Have you seen the following vehicles advertised in the past 30 days?



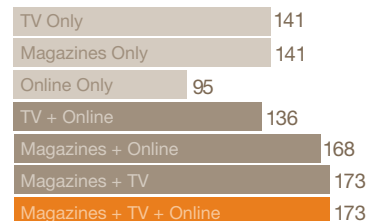
Message Association

Which of the following compact/small SUVs, if any, uses this message in its advertising?
“Freedom is a whole new dimension”



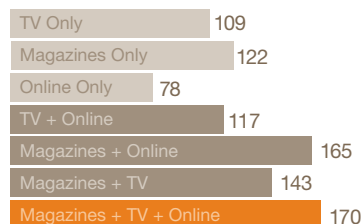
Brand Favorability

How would you describe your overall opinion about each of the following small/compact SUVs?



Purchase Consideration

The next time you are looking to buy or lease a vehicle, how likely are you to consider the following small/compact SUVs*?



(Index compared to consumers exposed to no advertising)

- Individual Media
- Two Media Combination
- Three Media Combination

Source: Dynamic Logic/Millward Brown, 2007

Dynamic Logic examined the ROI of each medium and combination of media for each stage of the Jeep Compass purchase funnel. Their findings included:

- **Magazines in isolation or magazines plus online were the most efficient of the various media and media combinations**
- TV in isolation or in combination with other media was less efficient for this campaign than magazines and online in isolation or combination

Calculated Cost-per-Person (CPP) by Metric and Exposure Cell
Lower Index = Greater Efficiency

	Individual Media			Two Media Combinations			Three Media Combination
	TV Only	Magazines Only	Online Only	TV + Online	Magazines + Online	Magazines + TV	Magazines + TV + Online
Aided Brand Awareness	236	100	131	282	133	314	207
Aided Ad Awareness	434	100	167	1666	147	380	212
Message Association	186	113	115	644	100	239	322
Brand Imagery							
Attribute A	—	—	—	—	100	461	301
Attribute B	—	183	—	—	100	238	199
Attribute C	—	156	—	—	100	204	215
Attribute D	1914	—	—	—	100	553	232
Attribute E	—	163	—	—	100	646	242
Attribute F	—	—	—	—	100	500	586
Brand Favorability	594	112	—	2496	100	330	317
Purchase Consideration	—	—	—	—	100	1887	960

Note: Index of 100 represents the most efficient medium or media combination and all other costs were indexed against the most efficient cost. A dash means that the increase was under one percentage point or did not increase.
 Source: Dynamic Logic/Millward Brown, 2007

Chrysler Sebring

Marketing Evolution performed a return on marketing objectives (ROMO) analysis for a joint research effort between Condé Nast Publications and Chrysler for the launch of the 2007 Sebring. The marketing goal was to increase the brand’s familiarity. In looking at how individual media (TV, magazines, online and newspapers) contributed to the campaign, the Chrysler Sebring study found distinct differences:

- **Magazines were the medium with the most impact in driving total awareness** (+12 points), **brand recognition** (+8 points), **and**, most important for this advertising campaign, **brand familiarity** (+11 points). Online also contributed to driving awareness (+5 points)
- **Print media were the most effective in driving purchase intent: newspapers** (+9 points) **and magazines** (+6 points)

Note: Additional information on how saturation affects automotive results can be found in "What other terms in Accountability are important to know" on page 32.

How Individual Media Contributed to Sebring Campaign Success Metrics

Chrysler's Main Metrics

	Point Difference			
	TV	Magazines	Online	Newspapers
Total Awareness	not sig.	12	5	not sig.
Sebring Recognition	not sig.	8	not sig.	-9
Familiarity (Top 2 boxes)	not sig.	11	not sig.	not sig.
Purchase Intent (Top 2 boxes)	not sig.	6	not sig.	9

Source: Marketing Evolution, 2007

The (ROMO) analysis also found distinct differences in efficiency among media. **Magazines emerged as not only an effective medium, but also the most efficient one for influencing purchase intent, brand recognition, and brand familiarity. Online was most efficient in driving total awareness.**

ROI by Medium

	People Impacted Per \$100K Spent (indexed)			
	TV	Magazines	Online	Newspapers
Total Awareness	—	827	100	—
Sebring Recognition	—	100	—	—
Familiarity (Top 2 boxes)	—	100	—	—
Purchase Intent (Top 2 boxes)	—	100	—	262

Note: Index of 100 represents the most efficient medium or media combination and all other costs were indexed against the most efficient cost. A dash means that the increase was under one percentage point or did not increase.
Source: Marketing Evolution, 2007

Based on efficiency, Marketing Evolution advocated shifts from TV and online into:

- **Magazines if the primary goal is to increase brand familiarity**
- **Magazines and newspapers if the primary goal is to enhance short-term sales** for those people who already have Sebring in their consideration set, i.e., purchase intent, or a combination of familiarity and purchase intent

Recommended Budget Reallocation

	Optimized Mix (percent by medium)			
	TV	Magazines	Online	Newspapers
Actual Mix	59.7	16.2	18.5	5.7
If the Goal is Familiarity	55.6	24.3	14.4	5.7
If the Goal is Purchase Intent	50.0	24.3	8.8	17.0
If the Goal is Familiarity & Purchase Intent	52.8	24.3	11.6	11.3

Source: Marketing Evolution, 2007

Ford F-150

When Marketing Evolution analyzed the effectiveness of media used in an advertising campaign for the Ford F-150 pickup truck, they found that:

- **Online and magazines drove the highest point changes overall**
- **Across the purchase funnel, TV delivered the lowest point change**

Ford F-150 Individual Media Effects

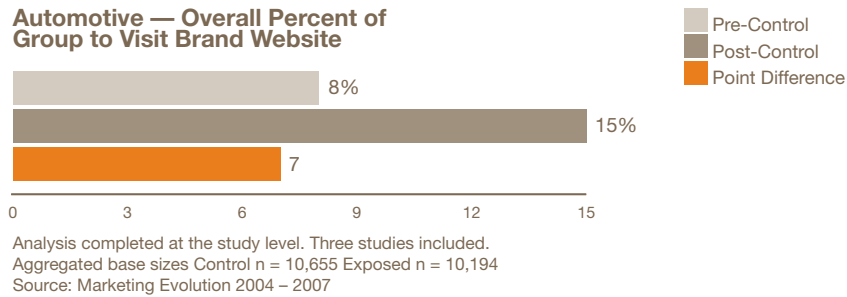
Branding Metrics Summary

	Point Difference		
	TV	Magazines	Online
Ad Recall	3	13	15
Familiarity	not sig.	11	10
Average Brand Image Attributes	not sig.	8	9
Purchase Consideration	5	6	6
Purchase Intention (unaided)	2	3	12

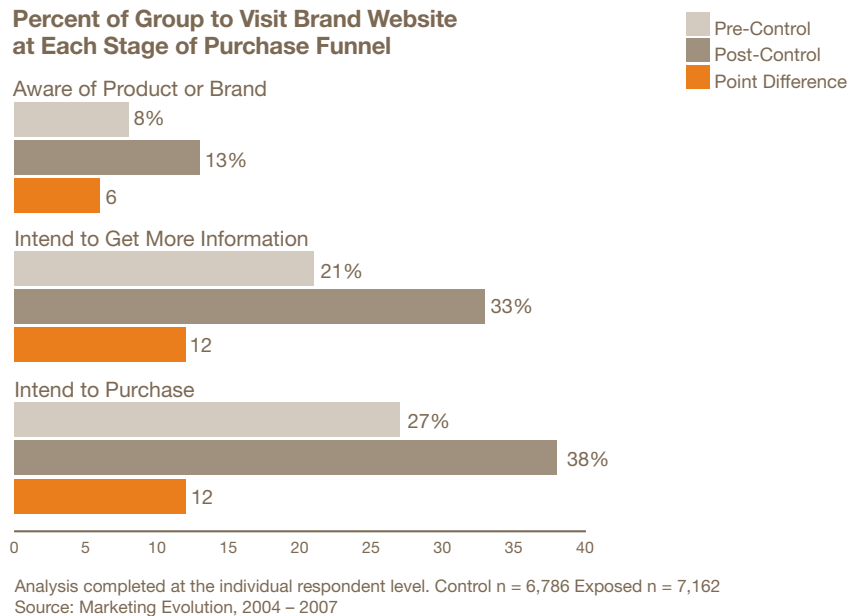
Source: Marketing Evolution, 2005

Media That Drive Online Success

As part of their analysis on how magazines drive web traffic (see pages 12-13) Marketing Evolution was able to examine the automotive category separately, comparing online visits among consumers who saw magazine ads (an exposed group) to consumers who read the different issues of the same magazines without any exposure to the ads (the control group). As with the aggregated studies' findings overall, they found that in all the automotive cases, **magazine ads had significant impact in driving traffic to the brands' websites—with an average increase of seven points, representing an 85% lift, over the control group.**



Again, in the automotive category the response to magazine ads was strong across all levels of the purchase funnel with the most impact at the bottom stages of the funnel.



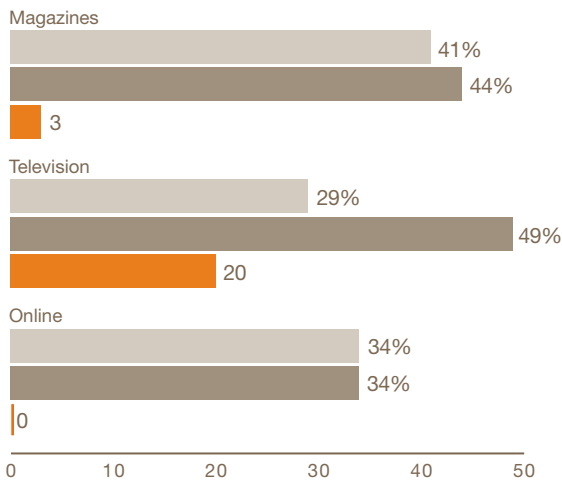
Electronics

Marketing Evolution found that when looking at an aggregation of electronics studies, **TV, supported by magazines, led in driving results throughout the purchase funnel.**

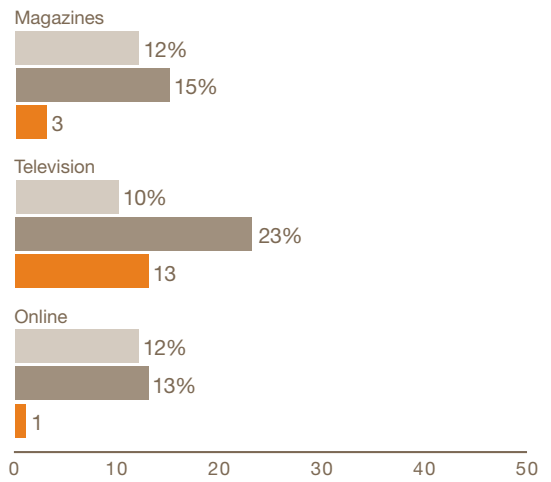
Electronics Purchase Funnel



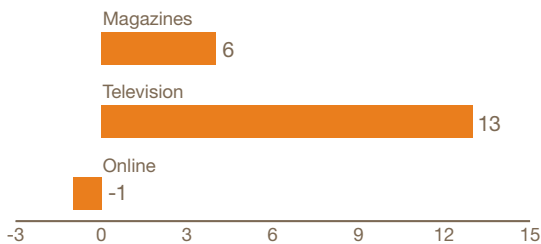
Total Brand Awareness



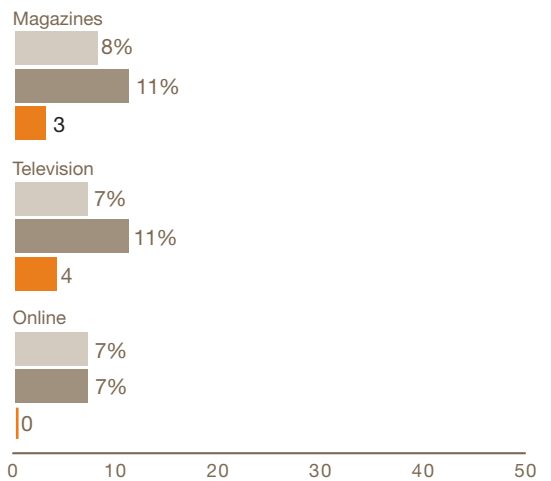
Brand Familiarity



Brand Imagery



Purchase Intent



Note: Because attributes vary widely based on the specific brand and category being measured, this analysis aggregated the top five attributes for each brand by medium.

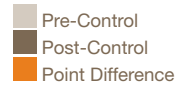
Aggregate of 3 studies
Source: Marketing Evolution, 2006

Entertainment

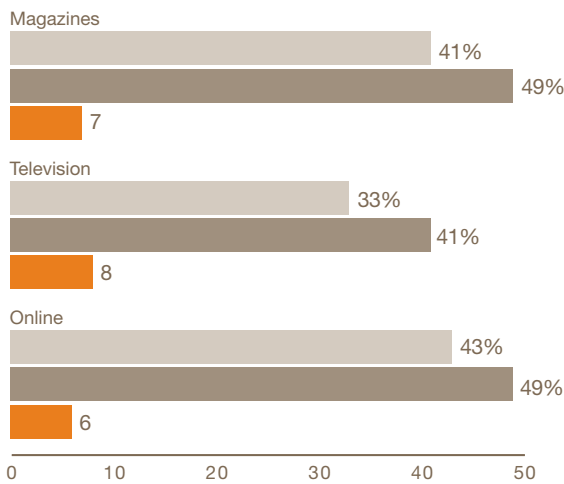
Marketing Evolution aggregated data from seven cross-media accountability studies in the entertainment category. They found that:

- All media contributed at each stage of the purchase funnel
- Television produced the highest increase in brand awareness with magazines a close second
- Overall, magazines were most effective across the purchase funnel, scoring the highest in brand familiarity, brand imagery and purchase intent

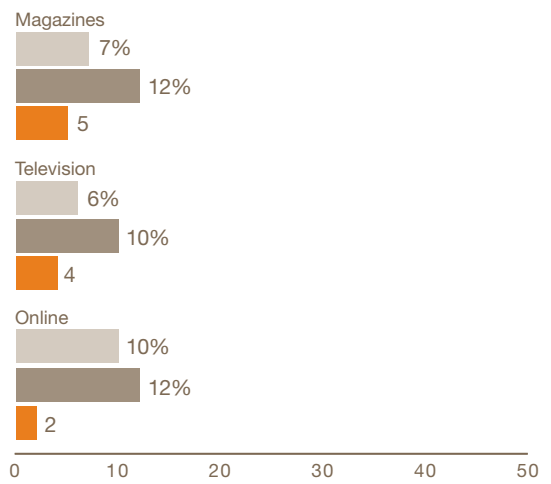
Entertainment Purchase Funnel



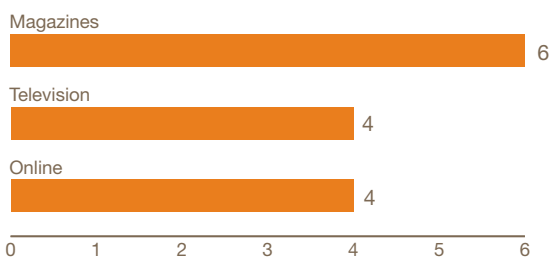
Total Brand Awareness



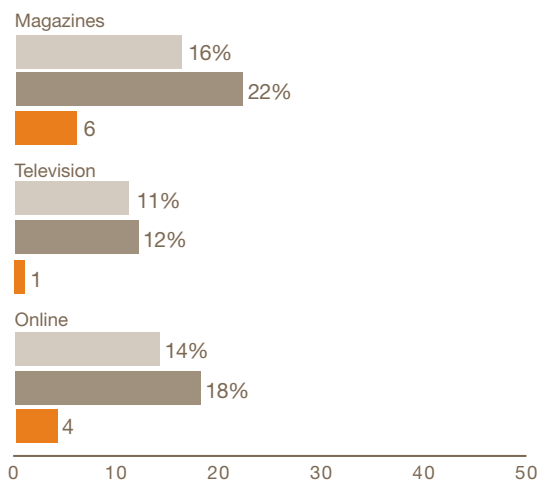
Brand Familiarity



Brand Imagery



Purchase Intent



Note: Because attributes vary widely based on the specific brand and category being measured, this analysis aggregated the top five attributes for each brand by medium.

Aggregate of 7 studies
Source: Marketing Evolution 2006

Note: The purchase intent question for this category is phrased as an intention to tune in, view, attend or buy the product.

Home Improvement

HomeSight™, a research resource developed by Meredith Corporation and CNW Market Research, found that **magazine editorial and ads were the most important resources for consumers throughout the home improvement purchase process**, eclipsing all other resources, including personal recommendations, retail exposure and other media. **Nearly half (45%) of all home improvers cited magazines as their primary source of motivation for beginning a new home improvement project.** Magazine editorial (24%) and magazine advertising (21%) contributed almost equally.

Primary Sources of Home Improvement Projects (percent)

Magazine Editorial	24%	Newspaper Editorial	3%
Magazine Advertising	21	Newspaper Advertising/FSI	3
Home Show/Other Demos	13	Internet Advertising	3
Friend/Neighbor/Contractor	12	Internet Editorial	2
Retail Exposure	7	Radio Program	1
TV Program	5	Radio Advertising	1
TV Advertising	5		

Source: CNW Research, Inc. 2007

Once consumers were committed to undertaking a home improvement project, HomeSight found that:

- **Magazine editorial and advertising excelled as the #1 and #2 sources of information for the consumer in the first four of five stages** in the home improvement purchase decision process.
- **Retail exposure was most important in the final stage of price comparison**

Top Sources of Information for the Five Stages of the Home Improvement Process (percent)

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
Needs Assessment	Product Comparison	Feature Comparison	Style/Design Comparison	Price Comparison
Mag. Edit 26	Mag. Edit 27	Mag. Edit 24	Mag. Ad 22	Retail Exp. 45
Mag. Ad 19	Mag. Ad 19	Mag. Ad 21	Mag. Edit 18	News Ad 14
Home Show 13	Internet Edit 10	Internet Edit 15	Retail Exp. 14	Mag. Ad 11
Friend 8	Home Show 10	Internet Ad 9	Internet Edit 11	Internet Edit 9

Source: CNW Research, Inc. 2007

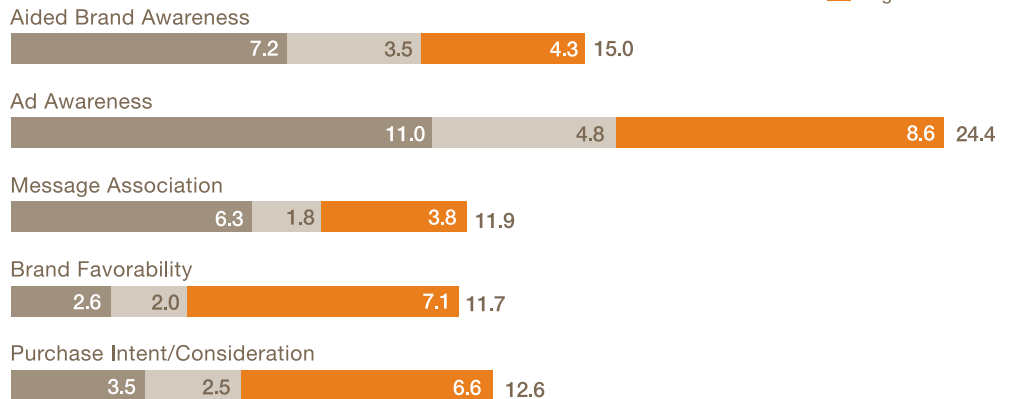
Packaged Goods

In the 32 cross-media accountability studies aggregated by Dynamic Logic, 14 of them represented the consumer package goods category. As with the overall results, findings in the consumer package goods category showed that:

- **Each medium contributed to results throughout the purchase funnel**
- **Television, supported by magazines, had the greatest impact on brand awareness, advertising awareness and message association**

- **Magazines excelled at the bottom of the funnel:**
 - Increasing brand favorability three times more than online and more than double that of TV
 - Boosting purchase intent/consideration the most, nearly double that of TV and three times that of online

Incremental Effect of Medium on Brand Metrics: CPG Studies
Average Percentage Point Increase Over Unexposed (Control) Baseline



Base: 14 Studies
Source: Dynamic Logic/Millward Brown CrossMedia Research, 2007
Note: Consumer magazines were used in this test; trade publications were excluded from this analysis.

In analyzing the effectiveness and efficiency of media for a packaged goods brand, Marketing Evolution recommended increasing the magazine and online portions of the advertising budget an incremental six percentage points for each medium.

**Consumer Packaged Goods Optimization
Media Mix Modeling Results**

	2004 Budget	Recommended Budget
TV	81%	69%
Magazine	9	15
Online	4	10
Radio	6	6

Source: Marketing Evolution, 2005

Pharmaceutical

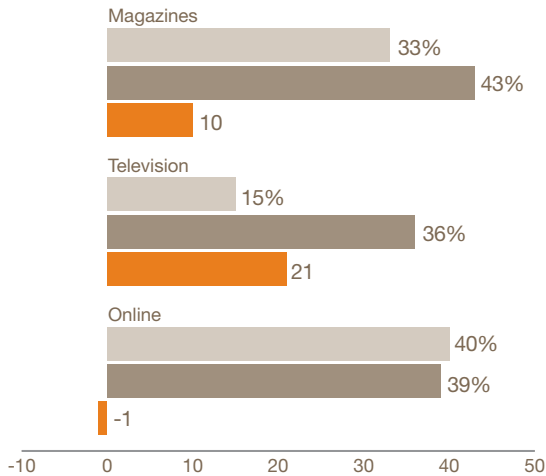
In aggregating data from pharmaceutical cross-media accountability studies, Marketing Evolution found that:

- **TV boosted brand awareness the most with an important contribution from magazines**
- **Online and magazines contributed the most to brand familiarity, while all media contributed to brand imagery**
- **Magazines ranked the highest in driving purchase intent, followed closely by TV**

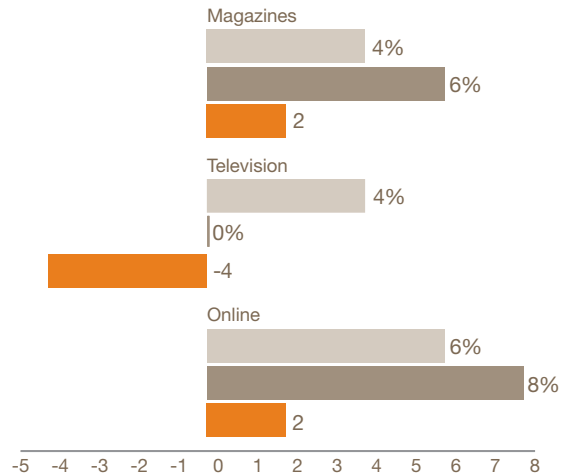
Pharmaceutical Purchase Funnel

Pre-Control
Post-Control
Point Difference

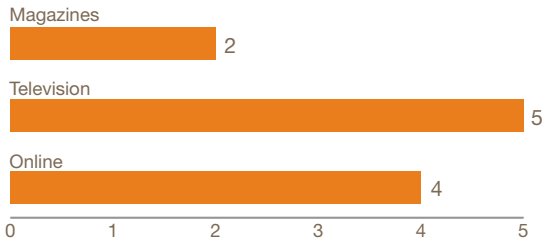
Total Brand Awareness



Brand Familiarity



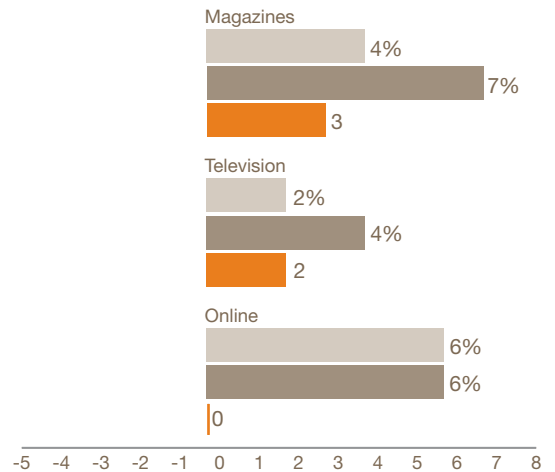
Brand Imagery



Note: Because attributes vary widely based on the specific brand and category being measured, this analysis aggregated the top five attributes for each brand by medium.

Aggregate of 2 Studies
Source: Marketing Evolution 2006

Purchase Intent



Note: The purchase intent question for this category is phrased as an intention to talk to your doctor/physician.

When looking at the cost efficiency of media in pharmaceutical advertising, a cross-media accountability study that Marketing Evolution performed for a major pharmaceutical brand revealed that **magazines generated almost twice the intent to talk with a doctor than TV, at less than a third of the cost.**

Pharmaceutical Recommended Mix

Cost Per Impact — Effort/intent to talk to a doctor (net)

Magazines

\$14.94

Online

\$16.22

Television

\$51.54

Source: Marketing Evolution, 2005

Affinity surveyed consumers on their recall and response to pharmaceutical direct-to-consumer (DTC) ads seen in magazines and on television. The study found that:

- **Recall scores for magazine DTC ad campaigns skewed much higher than those for TV**
- **Magazines indexed more than half again higher than TV for actions taken in response to DTC advertising, based on those who recalled the ad**

	Ad Recall	Recall Index	Action/Recall Percentage	Action/Recall Index
Magazine Ads	50%	139	17%	155
TV Commercials	36%	100	11%	100

Source: Affinity's VISTA Service, 2007

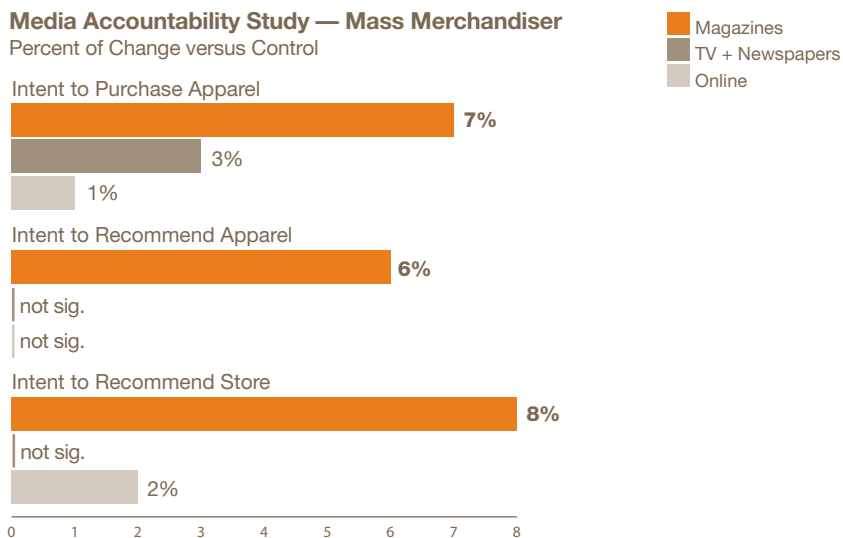
Retail

Marketing Evolution's accountability study for a mass merchandiser found that magazines were more effective than TV and newspapers together or the Internet:

- **Magazines were two times more effective than TV and newspapers together and seven times more effective than the Internet in driving purchase intent**
- **Magazines were the only medium to demonstrate a contribution increasing intent to recommend apparel**
- **Magazines were four times more effective than the Internet in driving intent to recommend the store**

Media Accountability Study — Mass Merchandiser

Percent of Change versus Control

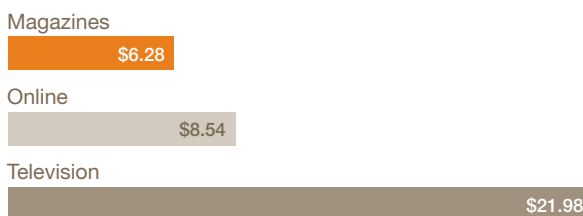


Source: Marketing Evolution, 2005

Marketing Evolution also found that **magazines were the most cost-efficient media channel for this retail brand's core campaign objective: intent to purchase apparel**. On a cost per impact basis, TV was three times more expensive and online was a third more expensive than magazines.

Retail Recommended Mix

Cost Per Impact — Apparel Purchase Intent



Source: Marketing Evolution, 2005

What's Next in Accountability

As advertisers look at new and different ways to isolate and measure the many elements that contribute to a campaign's success, accountability research will continue to evolve. The following trends provide insight into the future of accountability:

"Accountability means having a justification for the thinking, methodology, and questions that lead to insights."

— BIGresearch, *"How to Be Consumer-Centric and Accountable, Too"*

Using engagement attributes to increase accountability

Accountability studies today measure current or past marketing activities. A number of companies are examining how to improve results in the planning stages of an advertising effort. Many are specifically looking at whether engagement attributes can be used in the media selection process to improve advertising accountability.

Research in this area includes both syndicated products as well as custom studies. An example of the latter was provided by Starcom, which has linked its proprietary research (A.C.E.) to data from Affinity. The results indicated that **incorporating engagement factors into the planning process can improve results**, based on increasing advertising recall and forming a more favorable opinion of the product or service.

Linking Engagement Factors to Client Success Metrics

Engagement Rating	Recall	More Favorable Opinion
More Engaging Publications	106	146
Less Engaging Publications	100	100

Source: Starcom A.C.E. MRI Engagement Questions and Affinity's VISTA Service, 2006

Synergy between media and creative impact

Several companies are now trying to isolate the impact of advertising creative from the effects of the media in which the advertising appears. The goal is to boost accountability by leveraging the power of the creative message beyond results produced by the media environment. For example, Starcom has also been working to develop custom creative content for specific magazines and has found that **using contextual content increased advertising results**, as seen in higher recall, action taking, forming a more favorable opinion and purchase intent.

Determining Magazines' Return on Objectives

	Average Score in Magazine	Custom Content
Total Recall	54%	78%
Readers Who Took Action	27%	47%
Readers With More Favorable Opinion	4%	11%
Readers With Purchase Intent	8%	16%

Source: Starcom and Affinity's VISTA Service, 2006

Developing "off-the-shelf" accountability studies

While advertisers prefer custom studies, producing client-specific analyses can be both costly and time-consuming. Therefore, some accountability research companies are developing new products that leverage broad learning about accountability for general use.

Even though these products will not be client-specific, they may offer segmentation by such factors as a client's marketing objective, product category or demographic target, which may make these products more applicable to the client's needs and situation.

"Most of the time, media choices and their respective ROIs are not intuitive—analysis is required."

— Rex Briggs and Greg Stuart,
What Sticks: Why Most Advertising Fails and How to Guarantee Yours Succeeds

A wider range of companies measuring accountability

To date, the majority of accountability studies have been client-generated. With increased interest in marketing effectiveness, more parties are commissioning accountability research. For example, advertising agencies and media companies have produced accountability studies on behalf of clients. This document includes such studies, including:

- A joint research effort between Condé Nast Publications and Chrysler for the launch of the 2007 Sebring
- HomeSight, a resource developed by Meredith Corporation and CNW Research for home product marketers
- Starcom's A.C.E. platform

Re-examining corporate organization and culture

A 2007 study conducted among marketing executives for the Association of National Advertisers (ANA) found two factors are inhibiting the wider use and optimization of advertising accountability practices:

- Silos within companies where marketing has become disconnected from—and worse, adversarial with—other organizational functions, such as finance, sales and the supply chain
- A lack of written goals for marketing ROI within companies

To address these concerns, the ANA Marketing Accountability Task Force has recommended that actions be taken to encourage progress.

Frequently Asked Questions

How Is Marketing Analysis Performed?

While there are many approaches to examining accountability, two forms of analysis are most often used by advertisers. Both techniques share a common goal of providing accurate feedback on marketing effectiveness and ROI. Each method has its own distinct advantages and uses. **Marketing mix modeling** (MMM) has been in active use since the 1990s, but more recently a second form of accountability research—**marketing campaign analysis** (MCA)—has also gained traction in the advertising community.

Deciding what type of accountability analysis is best depends on the job that needs to be done. The marketer will determine which method is most appropriate for his or her own particular needs and programs, examining factors such as those listed in the chart below. Importantly, the inputs and interpretation involved in accountability analyses affect what can be learned. For example:

- As with any type of analysis, accurate and highly specific data are required to produce meaningful results in both MMM and MCA. Said differently, if the data used in the analyses are flawed, the quality of the output may be compromised

- An effective use of any form of accountability analysis necessitates looking beyond the numbers to understand that, like a snapshot, they only capture one point in time based on specific inputs. A marketer must look deeper to understand how various drivers and influences determine the success of a campaign

The following chart provides a comparison of how these two popular methods work, highlighting their similarities and differences.

Marketing Mix Modeling	Marketing Campaign Analysis
Methodology	
Regression-based analysis	Combines analytics with surveys, typically administered online
Statistically analyzes a multitude of variables simultaneously to assess the impact of changes in the marketing mix	Analysis compares consumers who saw an ad campaign (exposed group) to consumers without exposure (control group)
Offers insights into past marketing plans to explain as much as possible about what happened	Gives a quick read on new products and new campaigns while media activity is occurring
Focuses on bottom of the purchase funnel (generally sales)	Focuses on response throughout the purchase funnel
Time frame typically includes three or more years of data	Uses shorter time frame to measure the current advertising/marketing campaign
Inputs	
Extensive list of marketing-specific variables, such as media, promotions, direct marketing activity, events or sponsorships, financial incentives	Fewer elements measured over shorter period, typically media focused
Includes external factors (baseline elements), e.g., competitive activity, seasonality, weather conditions, impact of special events (Olympics, elections)	External factors are not typically included, although they may be inferred
Allows for “slicing and dicing” of data while maintaining data reliability	Sample size often prevents segmentation of qualitative data by multiple factors (e.g., gender, age, income, geography, brand awareness, and purchase intent)
Cannot probe for quantitative data such as brand attributes or image	May probe for quantitative data such as brand attributes or imagery

Note: A full explanation of modeling is available in the previously issued Accountability: A Guide to Measuring ROI and ROO Across Media.

How Is the Purchase Funnel Defined?

Measuring the effect of advertising on consumers as they make purchase decisions—i.e., go through the purchase funnel from initial brand awareness to purchase intent—is a common way for marketers to assess whether their advertising/marketing plans meet their objectives.

Examples of Purchase Funnel Stages



Purchase funnels typically recognize a sequence that begins with awareness of the brand or the advertising and concludes with purchase intent or an actual purchase:

Brand Awareness: The level of familiarity consumers have with a brand.

— **Aided brand awareness** occurs when the consumer is asked about a specific brand(s) by name or shown a picture of the brand logo.

— **Unaided brand awareness** occurs when the brand is neither named nor shown, i.e., the consumer is asked to name the brand without a prompt.

Advertising Awareness: The level of familiarity consumers have with the brand’s advertising

— **Aided ad awareness** occurs when the consumer is asked about a specific ad(s) or shown a copy of the advertisement itself.

— **Unaided ad awareness** occurs when the ad is neither named nor shown. The consumer is asked to recall the ad from recent memory.

Message Association: The extent to which consumers can match the key message and/or concepts in the advertising creative product to the brand.

Brand Familiarity: Measures the degree to which advertising increases the percentage of consumers who say they know the brand.

Brand Favorability: The extent to which consumers have a favorable opinion of the brand as a result of exposure to advertising.

Brand Imagery: Reflects the degree to which a consumer agrees with positive attributes specific to individual brands.

Purchase Consideration/Intent: The stage of the purchase funnel most closely associated with a consumer’s likelihood to take action. The consumer is asked to indicate how likely he or she is to purchase the brand.

Does Purchase Intent Correlate with Actual Purchase?

Advertiser Perceptions, a research company that has studied the issue of purchase intent, recently conducted a validation study with their Power Metrics product in order to validate purchase intent research.

More than one thousand respondents (age 18+) were asked to choose from a select list of product categories and brands that they “would consider for purchase in the next 90 days.” In a recontact study, these same respondents were then asked which product categories and brands they had purchased in the past 90 days.

The findings validate that purchase intent correlates strongly with purchase:

- On average, 84% of respondents in the recontact study said they purchased the product category that they had reported having plans-to-buy. Results differed by category, from a low of 73% for vodka to a high of 90% for cold cereal
- Purchase intent that resulted in actual purchases by brand was somewhat lower than purchase intent that resulted in actual purchases by category. On average, 61% said they purchased the brands in the recontact study that they had reported having plans-to-buy. Again, results differed by brand, from a low of 54% for a specific vodka name brand to a high of 80% for a brand of cold cereal

The difference in intent and actual purchase—including the variation in rates between the category versus individual brands—was caused by a range of factors. For example, sudden changes in price or in a consumer’s circumstances (i.e., job loss or medical emergency) obviously affected intent to purchase. Also, the higher the purchase price and more discretionary the purchase, the more likely that expenditure would be subject to change, especially for less affluent respondents. However, respondents who had the means to buy generally followed through on their intent.

Given Advertiser Perceptions’ results, plan-to-buy metrics appear to be viable measures for predictable purchase intent projections.

How Can There Be a Negative Point Difference in Results?

A negative impact in marketing activity results when a control group exhibits a higher level of response than the group exposed to the advertising. One expects the exposed group would perform better, producing a positive difference. Sometimes, however, the opposite occurs, producing a negative effect. This indicates that the advertising communication was not successful.

What Other Terms in Accountability Are Important to Know?

Return: What a marketer gains (or loses) as the result of a marketing or advertising program.

— **Return on investment (ROI)** measures the relative efficiency of various marketing tactics (such as advertising/promotion mix, media mix, scheduling options, etc.) against marketplace performance. ROI is typically expressed in dollars or indices based on cost.

— **Return on objective (ROO)** examines marketplace response for advertising and marketing programs against preset objectives (such as increasing brand awareness or positively influencing purchase consideration).

Factors affecting return: In analyzing marketing results, accountability analyses may provide perspective on the following factors produced by an advertising or marketing program:

— **Halo effect:** The effects of “sister” brands in a corporate portfolio on a particular brand being studied. For example, the marketers of Diet Coke need to be aware of the halo effect of other Coke products.

— **Umbrella effect:** The effect of overarching corporate or portfolio messaging on a particular brand being studied, e.g., automotive corporate advertising may impact individual models.

— **Decay rate:** The rate at which the impact of a marketing or media element (or mix) declines over time. For example, an ad running the week of July 23 may have a residual effect until mid-August or later.

— **Saturation:** The point at which advertising no longer drives sales or does so at a minimal rate. When advertising reaches the saturation point, it means each dollar spent has less value because the ad no longer has the same effect on the marketplace. As an example, “What Drives Automotive Sales” (www.magazine.org/accountability), an analysis of data from Hudson River Group, revealed that the money allocated to TV often exceeded the point of diminishing returns, whereas magazines were rarely

saturated. On average, TV exceeded saturation in nearly half the weeks in-market for three brands studied. The research also showed that by reallocating the “wasted” funds into magazines, ROI increased for all the brands studied by as much as 12%.

- **Scheduling overlap:** The effect of running media simultaneously versus in isolation. A key question for marketers is whether to have more media scheduled at the same time or sequentially or to allow for a hiatus in order to drive results. For example, Marketing Management Analytics examined the weekly flighting of magazines and TV at the brand level in a study titled “Measuring the Mix” (www.magazine.org/accountability). The research showed that the overall effectiveness of both media—and the individual effectiveness of each medium—was highest when there was a substantial overlap in weekly scheduling, i.e., when more mix occurred.

Success metrics: Measure the impact of marketing elements without factoring in cost. Success metrics include:

- **Marketing/media effectiveness:** The overall consequence of the marketing/media mix or the individual consequence of each medium or marketing element.
- **Incremental sales contribution:** The percentage of total sales attributed to a specific marketing or media activity.
- **Efficiency:** A metric that combines the incremental sales driven by a marketing tool with its cost; synonymous with ROI.

Sales drivers: Marketing activities with quantifiable results that can be used as inputs in marketing mix modeling. Sales drivers are usually one of two types:

- **Incremental sales drivers:** Activities that are a result of the specific marketing elements being analyzed in the marketing mix. These can be adjusted by marketers to influence sales. Incremental sales drivers may include creative messaging, promotions, financial incentives (such as APR or rebates), direct marketing activity, and the media mix where the advertising is placed.
- **Baseline sales drivers:** Activities that are not directly attributable to marketing because they are not fully controlled by the marketer. Baseline drivers may include competitive activity, the weather, the impact of special events (such as elections or the Olympics), or the prevailing economic climate.

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Accountability: How Media Drive Results and Impact Online Success

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MPA would like to acknowledge the following organizations who's work contributed to this compendium.

Advertiser Perceptions

Affinity Research/VISTA Print Effectiveness Rating Service

American Advertising Federation (AAF)

BIGresearch

CNW Marketing Research

Condé Nast Publications

Dynamic Logic/Millward Brown

JupiterResearch

Marketing Evolution

Mediamark Research Inc. (MRI)

Meredith Corporation

Online Publishers Association (OPA)

Starcom

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