

# **JACK MYERS Media Business Report**

## **27th Annual Myers Survey of Advertising Executives on National TV Sales Organization Performance**

### **Digital Video and Audio Media Sales Organizations**

**December 2012**

**This study incorporates 65 National TV Sales Organizations & seven Online/Multi-Platform Organizations.  
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## Digital Video & Audio - Value for the Investment\*



Digital Video & Audio	Total		Responsibility						Number of Years in Business						Gender				Location						Target									
	Total	RK	Client Executives	RK	TV Planner/ Buyer	RK	Digital Planner/ Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/ SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK		
Pandora	71.1%	1	64.3%	2	74.4%	1	74.5%	1	64.2%	5	71.1%	1	72.0%	1	68.7%	1	72.6%	2	64.2%	4	80.8%	1	83.4%	1	75.7%	2	64.2%	1	69.8%	1	67.4%	3		
YouTube	67.7%	2	71.9%	1	67.7%	2	61.1%	2	71.4%	3	62.8%	2	69.0%	2	64.8%	3	73.1%	1	64.7%	3	72.8%	2	63.1%	3	55.8%	4	60.5%	3	64.0%	2	67.5%	2		
Hulu	62.3%	3	58.1%	4	62.3%	3	50.0%	6	80.0%	1	54.6%	4	60.3%	4	67.9%	2	56.8%	5	67.0%	1	71.5%	3	42.3%	4	58.8%	3	53.1%	4	56.7%	3	70.0%	1		
Clear Channel/iheartradio	62.1%	4	60.8%	3	59.5%	4	53.8%	3	na	na	62.0%	3	64.1%	3	60.0%	4	62.8%	4	66.7%	2	57.2%	5	68.4%	2	75.9%	1	62.5%	2	56.4%	4	63.4%	4		
AOL/Huffington Post	55.7%	5	54.6%	5	56.4%	5	51.3%	5	73.9%	2	53.1%	5	48.7%	6	48.0%	6	63.8%	3	56.2%	6	61.1%	4	na	na	53.3%	5	44.1%	5	52.0%	5	63.3%	5		
Yahoo!	50.5%	6	51.6%	6	48.5%	7	52.7%	4	66.6%	4	43.2%	7	49.0%	5	52.3%	5	49.0%	7	57.4%	5	50.0%	6	30.0%	5	35.0%	6	38.5%	7	50.5%	6	47.7%	6		
Vevo	46.9%	7	50.0%	7	51.4%	6	46.4%	7	41.1%	6	50.0%	6	47.0%	7	44.5%	7	50.0%	6	47.6%	7	na	na	na	na	32.0%	7	44.0%	6	46.0%	7	31.6%	7		

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

## Digital Video & Audio - Quality Sales Team and Customer Service\*



Digital Video & Audio	Total		Responsibility						Number of Years in Business						Gender				Location						Target							
	Total	RK	Client Executives	RK	TV Planner/ Buyer	RK	Digital Planner/ Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/ SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK
Hulu	75.1%	1	71.9%	2	76.8%	1	66.6%	2	71.5%	2	76.5%	1	76.2%	1	75.7%	1	74.4%	1	75.5%	1	77.0%	2	76.9%	1	70.0%	1	66.7%	2	73.6%	2	80.0%	1
Pandora	72.7%	2	77.8%	1	68.3%	2	79.0%	1	67.8%	4	73.9%	2	71.4%	2	73.0%	2	71.4%	3	68.7%	2	88.5%	1	66.7%	2	63.9%	4	70.0%	1	78.6%	1	71.1%	3
AOL/Huffington Post	64.5%	3	71.5%	3	60.0%	5	61.6%	3	73.9%	1	71.9%	4	52.6%	4	56.0%	5	73.9%	2	57.1%	7	72.2%	3	na	na	53.3%	6	61.8%	3	65.3%	3	73.3%	2
YouTube	64.2%	4	71.0%	4	61.9%	4	52.7%	5	66.6%	5	72.5%	3	52.4%	5	60.5%	3	70.6%	4	66.2%	3	52.4%	5	52.6%	4	58.2%	5	58.2%	6	65.1%	4	55.5%	5
Vevo	61.6%	5	53.3%	6	65.8%	3	60.7%	4	64.7%	6	67.9%	5	50.0%	6	56.7%	4	67.8%	5	62.8%	5	na	na	na	na	65.4%	3	61.5%	4	60.7%	5	50.0%	7
Clear Channel/iheartradio	60.1%	6	58.4%	5	57.5%	6	50.0%	7	na	na	56.7%	6	64.1%	3	50.0%	7	67.5%	6	63.4%	4	61.9%	4	57.9%	3	65.5%	2	59.4%	5	54.5%	6	63.3%	4
Yahoo!	51.7%	7	46.9%	7	50.0%	7	52.6%	6	71.4%	3	48.8%	7	47.1%	7	53.2%	6	50.9%	7	59.3%	6	48.2%	6	30.0%	5	45.0%	7	41.0%	7	49.4%	7	54.5%	6

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

## Digital Video & Audio - Effective Upfront Presentation & Negotiations\*



Digital Video & Audio	Total		Responsibility						Number of Years in Business					Gender				Location						Target								
	Total	RK	Client Executives	RK	TV Planner/Buyer	RK	Digital Planner/Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK
Hulu	63.1%	1	65.7%	1	62.3%	1	69.6%	1	51.4%	4	62.1%	1	71.9%	1	64.5%	1	61.4%	1	58.9%	1	67.9%	2	65.4%	1	60.8%	1	56.2%	1	65.1%	1	58.8%	1
Clear Channel/iheartradio	51.3%	2	56.5%	2	45.6%	4	36.0%	6	na	na	50.0%	2T	51.3%	2	44.1%	4	55.8%	2	41.3%	5	71.4%	1	50.0%	2	50.0%	2	42.0%	5	43.4%	5	44.8%	5
YouTube	50.4%	3	46.9%	3	52.1%	2	57.2%	2	57.1%	1	50.0%	2T	42.8%	5	50.0%	2	52.0%	3	51.4%	2	47.6%	5	47.4%	3	48.8%	4	44.2%	3	50.6%	2	45.9%	4
Yahoo!	45.4%	4	45.5%	5	46.8%	3	39.4%	4	52.4%	3	40.9%	5	45.1%	3	44.6%	3	47.2%	5	42.6%	4	50.0%	4	40.0%	5	50.0%	2	48.7%	2	43.7%	4	56.8%	2
Vevo	43.7%	5	46.6%	4	40.0%	6	55.5%	3	43.8%	5	46.4%	4	33.3%	7	38.9%	5	50.0%	4	47.6%	3	na	na	na	na	32.0%	7	42.3%	4	46.0%	3	42.1%	7
AOL/Huffington Post	41.7%	6	33.3%	7	45.4%	5	38.5%	5	56.5%	2	32.2%	7	38.5%	6	36.8%	6	46.8%	6	41.1%	7	55.6%	3	na	na	34.5%	6	30.3%	7	37.8%	6	46.7%	3
Pandora	40.0%	7	44.4%	6	38.2%	7	31.8%	7	39.3%	6	34.0%	6	44.0%	4	34.9%	7	45.1%	7	41.2%	6	34.6%	6	47.4%	3	48.7%	5	41.9%	6	37.2%	7	44.6%	6

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

## Digital Video & Audio - Multi-Platform Brand Extensions & Integration\*



Digital Video & Audio	Total		Responsibility						Number of Years in Business						Gender				Location						Target									
	Total	RK	Client Executives	RK	TV Planner/ Buyer	RK	Digital Planner/ Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/ SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK		
Clear Channel/iheartradio	65.0%	1	45.8%	5	72.4%	1	73.1%	1	na	na	60.0%	1	69.2%	1	55.6%	4	72.1%	1	63.4%	3	57.1%	4	73.7%	1	72.4%	1	75.1%	1	61.8%	1	66.7%	2		
YouTube	62.9%	2	65.7%	2	62.0%	2	52.7%	4	71.4%	2	56.8%	3	61.9%	2	63.4%	2	63.4%	2	67.7%	1	68.2%	1	42.1%	4	60.5%	2	60.5%	3	61.6%	2	56.7%	4		
Vevo	61.5%	3	73.3%	1	54.3%	4	57.2%	2	70.6%	3	57.2%	2	61.1%	3	64.8%	1	57.1%	4	65.2%	2	na	na	na	na	50.0%	4	61.6%	2	60.8%	3	75.0%	1		
AOL/Huffington Post	53.7%	4	59.1%	3	56.6%	3	47.4%	5	73.9%	1	51.7%	4	42.1%	7	50.0%	5	57.8%	3	56.3%	4	61.1%	3	na	na	44.8%	7	47.1%	4	51.3%	5	56.7%	4		
Pandora	52.0%	5	53.6%	4	49.3%	6	54.8%	3	64.3%	6	50.0%	5	44.0%	5	57.8%	3	44.4%	6	48.5%	5	46.1%	6	68.4%	2	53.8%	3	46.5%	5	51.8%	4	47.9%	6		
Hulu	48.1%	6	40.7%	6	48.6%	7	34.9%	7	65.7%	5	42.4%	6	42.6%	6	46.2%	7	49.4%	5	48.4%	6	65.4%	2	46.2%	3	46.0%	6	44.4%	6	42.2%	6	45.8%	7		
Yahoo!	46.2%	7	33.4%	7	51.6%	5	47.4%	5	66.7%	4	38.6%	7	45.1%	4	49.2%	6	43.4%	7	48.2%	7	53.3%	5	30.0%	5	50.0%	4	43.6%	7	40.2%	7	63.7%	3		

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

## Digital Video & Audio - Relevant Research Support and Intelligence\*



Digital Video & Audio	Total		Responsibility						Number of Years in Business						Gender				Location						Target							
	Total	RK	Client Executives	RK	TV Planner/ Buyer	RK	Digital Planner/ Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/ SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK
Hulu	72.3%	1	65.7%	4	75.9%	1	62.2%	4	67.7%	3	77.3%	1	68.3%	1	68.0%	2	77.0%	1	75.5%	1	82.2%	1	52.0%	5	65.3%	3	62.9%	2	69.1%	1	70.0%	2
Yahoo!	66.4%	2	69.7%	3	65.6%	4	63.1%	3	76.2%	2	63.7%	4	66.7%	2	72.3%	1	60.4%	5	66.6%	2	63.4%	4	60.0%	3	70.0%	2	66.6%	1	68.9%	2	75.0%	1
YouTube	64.2%	3	71.9%	1	65.7%	3	69.5%	1	57.1%	5	74.0%	2	54.8%	3	62.8%	3	67.3%	2	65.6%	3	54.6%	6	52.6%	4	57.1%	5	54.7%	4	64.7%	3	62.1%	4
AOL/Huffington Post	61.8%	4	50.0%	6	69.1%	2	66.7%	2	78.3%	1	62.5%	5	51.3%	5	58.0%	5	66.0%	3	63.2%	4	66.7%	3	na	na	60.0%	4	61.7%	3	62.7%	5	70.0%	2
Pandora	61.6%	5	71.4%	2	58.8%	5	58.1%	5	55.5%	6	70.2%	3	52.9%	4	62.1%	4	62.9%	4	55.9%	5	73.0%	2	63.1%	1T	71.1%	1	52.4%	5	63.2%	4	57.5%	5
Clear Channel/iheartradio	50.0%	6	45.8%	7	52.2%	6	36.0%	7	na	na	43.3%	7	50.0%	6	40.0%	7	57.2%	6	48.2%	6	55.0%	5	63.1%	1T	48.2%	6	51.7%	6	44.4%	6	41.4%	6
Vevo	47.6%	7	57.1%	5	50.0%	7	40.7%	6	58.8%	4	46.4%	6	37.6%	7	52.8%	6	40.7%	7	45.2%	7	na	na	na	na	36.0%	7	44.0%	7	42.8%	7	36.9%	7

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

## Digital Video & Audio - Overall \*



Digital Video & Audio	Total		Responsibility						Number of Years in Business						Gender				Location						Target									
	Total	RK	Client Executives	RK	TV Planner/ Buyer	RK	Digital Planner/ Buyer	RK	3-7	RK	8-14	RK	15+	RK	Male	RK	Female	RK	NYC area	RK	Midwest	RK	West/ SW	RK	Men 18-49	RK	Women 18-49	RK	Digital Video	RK	Affluent	RK		
Hulu	64.2%	1	60.4%	3	65.2%	1	56.7%	3	67.3%	2	62.6%	2	63.9%	1	64.5%	1	63.8%	2	65.1%	1	72.8%	1	56.6%	3	60.2%	3	56.7%	2	61.3%	1	64.9%	1		
YouTube	61.9%	2	65.5%	1	61.9%	2	58.6%	2	64.7%	4	63.2%	1	56.2%	4	60.3%	2	65.3%	1	63.1%	2	59.1%	5	51.6%	4	56.1%	4	55.6%	3	61.2%	2	57.5%	5		
Pandora	59.5%	3	62.3%	2	57.8%	3	59.6%	1	58.2%	5	59.8%	3	56.9%	3	59.3%	3	59.3%	5	55.7%	4	64.6%	2	65.8%	1	62.6%	1	55.0%	4	60.1%	3	57.7%	4		
Clear Channel/iheartradio	57.7%	4	53.5%	6	57.4%	5	49.8%	7	na	na	54.4%	4	59.7%	2	49.9%	6	63.1%	3	56.6%	3	60.5%	4	62.6%	2	62.4%	2	58.1%	1	52.1%	5	55.9%	6		
AOL/Huffington Post	55.5%	5	53.7%	5	57.5%	4	53.1%	4	71.3%	1	54.3%	5	46.6%	6	49.8%	7	61.7%	4	54.8%	6	63.3%	3	na	na	49.2%	6	49.0%	6	53.8%	4	62.0%	2		
Vevo	52.3%	6	56.1%	4	52.3%	7	52.1%	5	55.8%	6	53.6%	6	45.8%	7	51.5%	5	53.1%	6	53.7%	7	na	na	na	na	43.1%	7	50.7%	5	51.3%	6	47.1%	7		
Yahoo!	52.0%	7	49.4%	7	52.5%	6	51.0%	6	66.7%	3	47.0%	7	50.6%	5	54.3%	4	50.2%	7	54.8%	5	53.0%	6	38.0%	5	50.0%	5	47.7%	7	50.5%	7	59.5%	3		

\*Overall score is the average of 5 attributes: Value for the Investment, Quality Sales Team and Customer Service, Effective Upfront Presentation and Negotiations, Multi-Platform Brand Extensions and Integration, Relevant Research Support and Intelligence

\*Respondents rated each sales organization with which they have a relationship on a 1-5 scale (5=market leader, 4=market achiever, 3=market average, 2=market laggard, 1=market loser). Rankings are based on the percentage of respondents rating each organization 4 or 5. Five performance attributes were measured. An overall average of the percentages for the five attributes was also computed. Detailed information on 1-5 ratings are available to premium subscribers.

# JACK MYERS MEDIA BUSINESS REPORT

## Methodology

The Myers Surveys of Advertising Executives on TV Sales Organizations have been conducted since 1984 and are the industry standard for measuring sales organization performance based on the perceptions of advertiser and agency executives. The report includes ratings among client executives, senior agency media management, media planners, and media buyers. The survey tracks and reports on the increasing importance of the advertiser network relationship evaluating networks on their performance as both sales organizations and media brands. The sales organizational performance of 72 media organizations is evaluated with each sales force rated according to a variety of attributes that define their relationships with advertisers and agency executives.

Respondents were asked to rate the sales organizations with which they are personally familiar on their industry competitive position on five key performance attributes:

- Value for the Investment
- Quality Sales Team and Customer Service
- Effective Upfront Presentation & Negotiations
- Multi-Platform Brand Extensions & Integration
- Relevant Research Support and Intelligence

Each sales organization was rated on a 1-5 scale for each of these key attributes:

- 5 = Market Leader
- 4 = Market Achiever
- 3 = Market Average
- 2 = Market Laggard
- 1 = Market Loser.

The Network categories include:

### **Broadcast TV Networks**

-ABC-TV  
-CBS-TV  
-FOX-TV  
-NBC-TV

-THE CW  
-Telemundo  
-Univision  
-ION Media Networks



### **News, Sports & Information Networks**

- Bloomberg News
- CBS Sports Networks
- CNBC
- CNN Networks
- ESPN Customer Marketing & Sales
- Fox News

- Fox Sports Networks
- MSNBC
- NBC Sports Networks
- Turner Sports
- The Weather Company (Weather Channel)

### **Cable TV Entertainment/Specialty Networks**

- Adult Swim/Cartoon Network
- ABC Family
- A & E
- AMC/WE/IFC
- BBC America
- BET
- Bravo
- Current TV
- Discovery Channel
- E!
- Fox Entertainment Cable Networks (FX, NatGeo)
- Fuse

- G4
- GSN
- Hallmark Channel
- History Channel
- ID - Investigation Discovery
- Lifetime Networks
- MTV Music & Logo Group
- MTV Entertainment Group (Comedy Central, Spike, CMT, TV Land)
- MTV Kids & Family (Nickelodeon)
- Ovation
- Oxygen
- Reelz

- RL (Retirement Living)
- Scripps (Food Network & Cooking Channel)
- Scripps (HGTV & DIY)
- Scripps (Travel Channel & GAC)
- Style
- Syfy
- TLC: The Learning Channel
- Turner Entertainment Sales (TBS/TNT)
- TV Guide Network
- USA
- WGN America

### **Other National TV & Online Media**

- AOL/Huffington Post
- CBS Television Distribution
- Clear Channel/iheartradio
- Comcast Spotlight
- Disney ABC Domestic Television
- Hulu
- National Cinemedia
- NBC Universal Television
- NCC

- Paramount Pictures
- Pandora
- Screenvision
- Sony Pictures Television
- 20th Television
- Vevo
- Warner Bros Domestic TV
- Yahoo!
- YouTube

The top two-box percentage (Leader/Achiever - 4/5) is reported for each sales organization for each attribute as well as their overall score based on the average of the five attributes: ***Value for the Investment, Quality Sales Team and Customer Service, Effective Upfront Presentation and Negotiations, Multi-Platform Brand Extensions and Integration, Relevant Research Support and Intelligence.***

The sales organizations were then ranked within their competitive network category for each of the following respondent subsets:

**-Total Respondents**

**-Job Responsibility**

- Client Executives
- TV Planner/Buyer
- Digital Planner/Buyer

**-Number of Years in the Business**

- 3-7 years
- 8-14 years
- 15 years or more

**-Gender**

**-Office location**

- New York City Area
- Midwest
- West/Southwest

**-Major Target Demographic**

- Men 18 to 49
- Women 18-49
- Digital/Video
- Affluent

The survey was conducted online during October 2012. Lists of business contacts were derived from Myers' in-house database and networks' submissions of both their agency and advertiser client contacts. Respondents were identified personally and were qualified by Myers as influential members of the media buying and marketing community. They were then invited, via e-mail, to participate in an online survey. There were 402 respondents who participated in the survey. As an incentive, a cash reward was given.

Results are not presented for cell counts with less than 14 respondents and are designated as such by "**na**" (not applicable). Caution should be used when interpreting data for subgroups with small base sizes. Results should be considered directional rather than projectable in nature.

Detailed information for full 1-5 ratings is available upon request to premium clients.

## Myers 2012 TV Industry Report on Network Sales Organizations Respondent Profile



Total # of Respondents: 402\*

### My responsibility is:

Client / Advertiser Executive	18.2%
Agency TV Planner/Buyer/Executive	63.0%
Agency Digital Planner/Buyer/Executive	12.4%
Agency Creative/Branded Entertainment Executive	1.3%
Agency General/Account/Research Management	4.2%
Other	0.9%

### My office is located in the following market area:

Northeast	5.3%
Southeast	7.3%
Midwest	17.2%
West Coast	11.8%
NYC Area	56.5%
Southwest	1.9%
West/Southwest	13.7%

### I have been in the advertising business for:

1-2 years	1.9%
3-7 years	28.1%
8-14 years	35.0%
15 + years	35.0%

### Gender

Male	44.6%
Female	55.4%

### Target Demographic

National TV	84.4%
Adults 18-49	64.5%
Men 18-49	30.2%
Women 18-49	35.1%
Adults 25-54	64.5%
Men 25-54	30.9%
Digital Video	52.7%
Women 25-54	51.9%
Adults 55+	16.8%
Mass	34.7%
Affluent	30.9%
African American	24.8%
Branded Entertainment	38.9%
Asian American	4.6%
Hispanic	35.1%
Gay	6.9%
Business to Business	14.1%
Don't use age/gender demos	2.7%

\* Respondent Groups highlighted in red appear as banners in the report

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