

JackMyers Survey of Advertising Executives On Television Advertising Value and Sales Organization Performance



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ATTRIBUTE IMPORTANCE:
TV ADVERTISING SALES
BEST PRACTICES**

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AGENCY VS. CLIENT
(ADVERTISER)**

I.1 Attribute Importance: TV Advertising Sales Best Practices	2008 Top 2 Boxes¹	2008 Rank	2007 Top 2 Boxes¹	2007 Rank	2008/2007 Change
Organization Delivers on Promises	94.1%	1	93.9%	1	0.2%
Sales Representatives are Responsive to My Needs & Interests	90.9%	2	90.1%	2	0.9%
Delivers Value for the Investment	80.8%	3	New Attribute		
Provides Trusted Environment for Advertising	67.1%	4	59.6%	5	12.6%
Organization Delivers Efficient Media Costs	66.7%	5	70.3%	3	-5.1%
Delivers More Targeted & Engaged Audiences	64.8%	6	63.0%	4	2.9%
Organization Offers Innovative & Non-Traditional Opportunities	64.8%	6	56.6%	6	14.5%
Organization Provides Relevant Research Insights	53.9%	8	New Attribute		

* For the second year in a row, “Delivering on Promises” and “Responsive to My Needs and Interests” are the #1 and #2 ranked attributes most expected by sales organizations and its representatives, respectively, as identified by agency and advertiser executives participating in this 25th annual JackMyers industry survey.

* “Delivers Value for the Investment,” a newly-introduced attribute in the 2008 survey, achieved an impressive #3 rank, with a Top 2 Boxes score of 80.8%, although thirteen and ten points below the top two attributes.

* Sales organizations that “Provide Trusted Environment” was the second-highest growing attribute, up 12.6%, '08/'07, and moved up in rank to #4 (#5, '07).

* “Organization Delivers Efficient Media Costs,” declined in importance (by -5.1%, from 70.3% in 2007 to 66.7% in 2008) and rank (down 2 notches, from #3 to #5). It’s not just achieving efficient CPM’s anymore. It’s Value.

* The #6-ranked tie (64.8% Top 2 Boxes) between “Offers Innovation and Non-Traditional Opportunities” and “Delivers More Targeted and Engaged Audiences” is based on the former attribute achieving the highest growth rate (+14.5%, year-on-year, and nearly five times the growth rate) over the latter, with a modest growth rate of 2.9%.

* Also, notably, with a growth rate of nearly five times that of its tied attribute, “Organization Offers Innovative and Non-Traditional Opportunities” versus “Delivers More Targeted and Engaged Audiences,” with Top 2 Boxes score of 64.8%, #6 rank and +2.9% and +14.5% growth year-on-year,” does this suggest that 2009/2010 will be the years of change: moving ad dollars more proportionately to media behavior?

* An attribute new to the 2008 survey, “Organization Provides Relevant Research Insights,” ranked 8th, with the lowest Top 2 Boxes scores of 53.9%, 43% below the top-ranked attribute, “Organization Delivers on Promises.” Although this does not bode well for media and market research (survey-based) companies, does this mean a movement to utilizing metrics that are more census-sized, single-sourced, interactive, transactional, and near-realtime? Accountability.

For more information, contact Jack Myers at jm@jackmyers.com.

¹ “Top 2 Boxes” refers to the two highest scores on a scale 1-X. In this survey, a seven-point scale was used, where 1 represents “Not at All Important” and 7 represents “Extremely Important.” A score of 94.1% for “Organization Delivers on Promises” indicates that of all respondents who answered this question, 94.1% chose either a 6 or a 7 on the seven-point scale (and the remainder 5.9% chose a 1, 2, 3, 4 or 5 on the seven-point scale.

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IN THIS REPORT:

**1.2
THE IMPACT OF THE SALES
CALL: TV ADVERTISING
SALES BEST PRACTICES**

IN SUBSEQUENT REPORTS:

**1.1
ATTRIBUTE IMPORTANCE:
TV ADVERTISING SALES
BEST PRACTICES**

**1.3
RESPONDENT PROFILE
&**

**KEY INSIGHTS:
WOMEN v. MEN**

**1.4
ATTRIBUTE IMPORTANCE:
AGENCY VS. CLIENT
(ADVERTISER)**

1.2 The Impact of the Sales Call: Advertising Sales Best Practices

All National TV Sales Organizations - The Top 5

Sales Organization	Fox Cable Sports	Turner Sports	BBC America	The CW	NBC TV Network	Avg.
Index*	148	142	139	139	137	120
“Met With” Mean Score	5.57	5.52	5.13	5.44	5.28	5.34
“Not Met With” Mean Score	3.76	3.89	3.70	3.92	3.86	4.51

* In today’s virtual world of emailing, text-messaging and volleying voicemail messages in lieu of live phone conversations - meeting clients and prospective clients in person greatly improves the Overall Performance Ratings (Power Scores) of sales organizations and may lead, hopefully, to the mutual benefit of sellers and buyers alike: Business.

On average, Performance Ratings of all national TV sales organizations improved* by 20%:

- * Broadcast Networks +25%
- * News & Sports Networks +23%
- * Youth Networks +19%
- * General Audience Cable Networks+17%
- * Emerging & Non-Traditional Networks**

* Indices for sales organizations that exceeded the "Average" may be interpreted as a positive - the affect of conducting in-person meetings.

* Indices that are slightly above or below the "Average" should be looked at more closely, as it may be validating a stage of a sound business relationship between buyer and seller - building, established, or fostering - based on longevity, investment, or other factors. Specifically, this is noticeable when the gap between “Met With” and “Not Met With” Mean Scores is smaller, yielding a small index. When the “Not Met With” Mean Score is higher than the “Average” and within close range of a higher-than-average “Met With” Mean Score, this may be indicative of a healthy business relationship. This is evidenced by the more established networks - broadcast and cable, and by genre.

* Lastly, there are occasions where “Not Met With” Mean Scores exceed the “Met With” Mean Scores, which may be

interpreted two or more ways: Crisis? Opportunity?

Please refer to the JackMyers Research “Advertising Sales Practices” reports for details.

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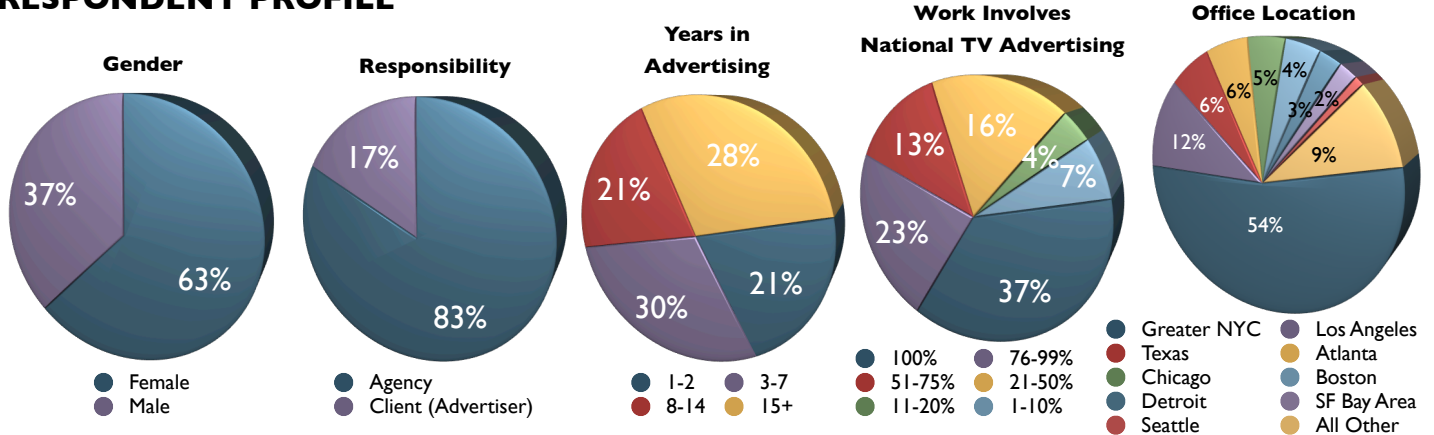
*Index/indices and percentage gain are derived by *dividing the Mean Score* of agency/advertiser respondents that indicated that they “*Met With,*” *in person,* the sales executive (of the specific company identified) within the last 12 months *by* the *Mean Score* of agency/advertiser respondents that indicated that they “*Did Not Meet With,*” *in person,* with the sales executive (of the specific company identified) within the last 12 months, expressed as an index, percentage gain, or both.

**Emerging & Non-Traditional Networks. Due to respondent counts that did not meet minimum reporting standards, some data are withheld from reporting in certain banners and sub-groups. Reported data should be looked at directionally.

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RESPONDENT PROFILE



IN THIS REPORT:

1.3.1 RESPONDENT PROFILE

1.3.2 KEY INSIGHTS: WOMEN v. MEN

- ★ Attribute Importance
- ★ TV Ad Value & Sales Organization Performance (Power Scores)

IN SUBSEQUENT REPORTS:

1.1 ATTRIBUTE IMPORTANCE: TV ADVERTISING SALES BEST PRACTICES

1.2 THE IMPACT OF THE SALES CALL: TV ADVERTISING SALES BEST PRACTICES

1.4 ATTRIBUTE IMPORTANCE: AGENCY VS. CLIENT (ADVERTISER)

1.3.1 Women vs. Men Attribute Importance: TV Advertising Sales Best Practices	% Top 2 Boxes Total	% Top 2 Boxes Women	% Top 2 Boxes Men	Point Difference from Total: Women Men	
Organization Delivers on Promises	94.1	95.2	91.9	1.1	-2.2
Sales Representatives are Responsive to My Needs & Interests	90.9	94.4	86.5	3.5	-4.4
Delivers Value for the Investment	80.8	86.3	71.6	5.5	-9.2
Provides Trusted Environment for Advertising	67.1	71.8	58.1	4.7	-9.0
Organization Delivers Efficient Media Costs	66.7	73.8	56.8	7.1	-9.9
Delivers More Targeted & Engaged Audiences	64.8	69.4	60.8	4.6	-4.0
Organization Offers Innovative & Non-Traditional Opportunities	64.8	71.8	54.1	7.0	-10.7
Organization Provides Relevant Research Insights	53.9	58.9	45.9	5.0	-8.0

The insights garnered from the table above, both vertically and horizontally, is fodder for thought and discussion in setting objectives in pursuit of opportunities. Also, based on the scores in the tables above and below, this writer respectfully yields to the observations and thoughts noted by John Gray, author of "Men Are From Mars, Women Are From Venus."

For more information, contact Jack Myers at jm@jackmyers.com.

1.3.2 Women vs. Men Television Advertising Value & Sales Organization Performance (Power Scores): TV Advertising Sales Best Practices	Total	Women	Men	Point Difference from Total: Women Men	
All Nationals Sales Organizations Average (#38)	48.4	49.2	47.7	0.8	-0.7
#1 Ranked Sales Organization in Category	62.5	62.8	NA	0.3	NA
Broadcast Networks Average (#6)	45.8	47.6	42.1	1.8	-3.7
#1 Ranked Sales Organization in Category	52.2	52.1	52.4	-0.1	0.2
General Audience Cable Networks Average (#17)	48.5	48.3	48.7	-0.2	0.2
#1 Ranked Sales Organization in Category	59.9	61.8	54.6	1.9	-5.3
News & Sports Networks Average (#9)	47.5	50.9	40.3	3.4	-7.2
#1 Ranked Sales Organization in Category	57.6	58.9	54.5	1.3	-3.1
Youth Networks Average (#6)	52.6	50.1	54.8	-2.5	2.2
#1 Ranked Sales Organization in Category	62.5	62.8	62.0	0.3	-0.5

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The Top 5 Sales Organizations/Networks Ranked by Attribute Importance

See footnotes below re: "Attribute Importance"¹ & "Top 2 Boxes"²

#1*: Sales Organization Delivers on Promises

(*#1-Ranked Attribute by Importance: 94.1%)

Hallmark Channel	#1
A&E Television Networks	#2
Turner Entertainment Networks	#3
NBC Universal Cable Networks	#4
FOX Broadcasting Sales	#5
TOP 5 - WEIGHT AVERAGE	61.3%
AVERAGE - ALL (#38)	50.4%

#2*: Sales Reps are Responsive to My Needs & Interests

(* #2-Ranked Attribute by Importance: 90.9%)

Nickelodeon Kids & Family Group	#1
Hallmark Channel	#2
Turner Entertainment Networks	#3
The Weather Channel	#4
Adult Swim	#5
TOP 5 - WEIGHT AVERAGE	69.2%
AVERAGE - ALL (#38)	57.6%

#3*: Delivers Value for the Investment

(*#3-Ranked Attribute by Importance: 80.8%)

NBC Universal Cable Networks	#1
Nickelodeon Kids & Family Group	#2
Hallmark Channel	#3
Adult Swim	#4
Rainbow Networks (AMC, WE)	#5
TOP 5 - WEIGHT AVERAGE	56.1%
AVERAGE - ALL (#38)	44.0%

#4*: Provides Trusted Environment for Advertising

(*#4-Ranked Attribute by Importance: 67.1%)

Nickelodeon Kids & Family Group	#1
Scripps Networks	#2
The Weather Channel	#3
Hallmark Channel	#4
ABC Family	#5
TOP 5 - WEIGHT AVERAGE	70.9%
AVERAGE - ALL (#38)	53.3%

#5*: Delivers More Targeted & Engaged Audiences

(*#5-Ranked Attribute by Importance: 64.8%)

Nickelodeon Kids & Family Group	#1
Adult Swim	#2
Scripps Networks	#3
NFL Network	#4
Turner Sports	#5
TOP 5 - WEIGHT AVERAGE	65.0%
AVERAGE - ALL (#38)	48.3%

#6*: Organization Offers Innovative & Non-Traditional Opportunities

(*#6-Ranked Attribute by Importance: 64.8%)

Nickelodeon Kids & Family Group	#1
Rainbow Networks (AMC, WE)	#2
The Weather Channel	#3
MTV Entertainment Group	#4
Scripps Networks	#5
TOP 5 - WEIGHT AVERAGE	49.6%
AVERAGE - ALL (#38)	37.4%

#7*: Organization Provides Relevant Research Insights

(*#7-Ranked Attribute by Importance: 53.9%)

Nickelodeon Kids & Family Group	#1
Rainbow Networks (AMC, WE)	#2
The Weather Channel	#3
MTV Entertainment Group	#4
Scripps Networks	#5
TOP 5 - WEIGHT AVERAGE	49.6%
AVERAGE - ALL (#38)	37.4%

¹ & ² Attribute Importance" as it is presented in this report is based on the two highest scores (6-7, referred to as "Top 2 Boxes") on a seven-point scale (1-7), where 1 represents "Not at All Important" and 7 represents "Extremely Important," as indicated by the respondents participating in this survey that answered this battery of questions.

Examples: Attribute "Sales Organization Delivers on Promises" received the highest score on Attribute Importance: 94.1% of respondents scored this attribute with either a 6 or 7 on a seven-point scale. The remainder amount in this example, 5.9% (100% - 94.1% = 5.9%), chose a score of 1, 2, 3, 4 or 5 on the seven-point scale. Continuing, "Sales Representatives are Responsive to My Needs and Interests," with a Top 2 Boxes score of 90.9%, is second-highest in rank...and so on.

Within each Attribute, the Top 5 Sales Organizations are identified in rank order, based on the respondents' scores in the "Top 2 Boxes." Also provided are the weight average for the Top 5 Sales Organizations and the Weight Average of all 38 sales organizations reported in this survey.

For more information, contact Jack Myers at jm@jackmyers.com.