



APPENDIX



optimizing vs. minimizing

MEDIA

in partnership with **think^{tv}**

Top 10 Research Learnings

1. **TV advertising** is best at driving **Awareness, Understanding, Top of Mind** and **Image**: TV was ranked the #1 medium in every category, and for every age group
2. **Free samples** are the #1 driver of **Trial**, not surprisingly, but also the #1 driver of **Loyalty** in almost every category we looked at
3. **OOH** performed well across several brand objectives: **Large outdoor billboards or posters** ranked #2 on the measures **Awareness** and **Top of Mind** in most categories, and even tied with TV for #1 driver of **Top of Mind** for retail
4. **YouTube** performs best on the measure **Understanding**, ranking #2 overall driven by its #2 rank in the Auto and Online Travel categories, and its strength with younger adults
5. **Magazines** performed well on **Image** across all income brackets, for both Men and Women, and for anyone over 35
6. What gender divide? There were actually very few differences between male and female respondents, with the one exception being **Emails from Companies**, which ranked much higher amongst women, especially when it comes to driving **Loyalty**
7. **Online Ads via Smartphone** performed above average with only one age group (A18-24) and on only one measure (**Top of Mind**) where it ranked #2 (after TV)
8. While younger adults – both the 18-24 and 25-34 groups – ranked YouTube and social media higher than their older cohorts, they both ranked **TV Advertising** as the #1 driver of **Awareness, Understanding, Top of Mind** and **Image**
9. Different incomes had almost no impact on the specific drivers of brand objectives, with the one exception being that **Movie Theatre** makes an appearance as being a strong driver of **Image** with the group that make \$100k +
10. These results highlight the importance of focusing on **value over cost**

What We Did

Provides a common base to compare across mediums.
To provide you with the evidence that the lowest cost doesn't always make for the best decision

8 categories



retail clothing



alcohol



toothpaste



online travel



banking



automotive



fast food



soft drinks

6 brand objectives

- Awareness
- Understanding
- Trial
- Top of mind
- Image
- Loyalty

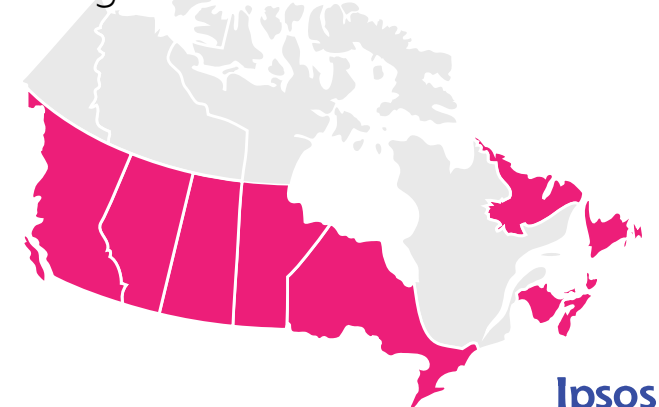
16 brands

OLD NAVY	pepsi	TD	Coors LIGHT
Ford	M	WINNERS	CIBC
Crest	Coca-Cola	trivago	Corona
Tim Hortons	Hotels.com	Colgate	TOYOTA

17 touchpoints

- facebook
- radio
- tv traditional
- digital ad
- social media other
- mobile ad
- youtube
- billboard
- email
- tv internet
- poster
- newspaper
- mail ad
- flyer ad
- free sample
- magazine
- cinema

2,007
English Canada interviews



Study Details

BRAND OBJECTIVES

Qualified respondents were asked the following questions about each medium:

- **AWARENESS:** Makes you aware of <INSERT CATEGORY> for the first time
- **BUILD UNDERSTANDING:** Builds your understanding of <INSERT CATEGORY>
- **TRY FOR THE FIRST TIME:** Gets you to try <INSERT CATEGORY> for the first time
- **KEEP TOP OF MIND:** Keeps <INSERT CATEGORY> top of mind
- **SUPPORT GOOD IMAGE:** Supports <INSERT CATEGORY>'s good image
- **ENCOURAGE LOYALTY:** Encourages greater loyalty to <INSERT CATEGORY>

Spend for impact: Stronger drivers by brand objective

Base: **Total**

N = 2007

TP Influence (INDEX) - Total	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	135	166	139	134	155	136
TV via Internet	102	109	100	100	102	91
YouTube	102	124	100	100	112	97
Facebook	95	93	80	97	91	91
Social media other than Facebook	87	88	85	91	86	84
Online ads via PC/tablets	95	88	85	100	86	84
Online ads via smartphone	84	73	80	94	75	71
Radio	102	98	90	106	86	91
Large outdoor billboards or posters	116	73	95	122	107	84
Indoor Posters	105	78	90	106	102	84
Movie theatre	98	88	85	97	102	91
Newspaper	95	98	90	94	96	78
Magazine	105	109	95	97	118	91
Emails from companies	80	104	90	88	86	130
Advertising mailings	102	104	109	94	91	110
In-store Circulars or Flyers	95	98	109	94	96	117
Free Samples	105	109	184	82	112	169

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Retail**

N = 503

TP Influence (INDEX) - Retail	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	139	153	140	122	141	119
TV via Internet	97	105	96	96	103	86
YouTube	100	110	100	93	108	93
Facebook	97	105	79	101	86	86
Social media other than Facebook	87	81	87	87	81	79
Online ads via PC/tablets	90	86	83	96	81	79
Online ads via smartphone	87	77	83	99	76	66
Radio	110	91	87	104	81	79
Large outdoor billboards or posters	119	81	105	122	114	73
Indoor Posters	113	96	114	110	119	66
Movie theatre	87	81	79	90	86	99
Newspaper	97	96	83	101	86	79
Magazine	116	120	114	101	124	93
Emails from companies	77	91	87	104	86	159
Advertising mailings	100	96	96	101	86	113
In-store Circulars or Flyers	94	124	109	96	119	146
Free Samples	90	110	157	78	124	185

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Banking**

N = 500

TP Influence (INDEX) - Banking	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	141	168	154	134	167	140
TV via Internet	114	119	109	100	105	88
YouTube	87	108	96	89	111	96
Facebook	99	86	83	100	86	96
Social media other than Facebook	91	86	90	93	80	88
Online ads via PC/tablets	99	81	90	96	80	88
Online ads via smartphone	80	65	83	96	74	61
Radio	103	114	96	110	80	105
Large outdoor billboards or posters	114	65	77	117	93	79
Indoor Posters	103	65	83	117	99	61
Movie theatre	103	76	71	103	93	88
Newspaper	103	130	96	107	111	88
Magazine	99	124	90	100	123	88
Emails from companies	80	124	109	96	93	132
Advertising mailings	99	119	115	96	105	114
In-store Circulars or Flyers	95	92	103	79	99	114
Free Samples*	91	81	160	69	105	167

#1 medium

#2 medium

* Interpret these results carefully as “free samples” wasn’t defined and it’s hard to know what each respondent was assuming for this question

Spend for impact: Stronger drivers by brand objective

Base: **Automotive**

N = 501

TP Influence (INDEX) - Automotive	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	138	162	141	132	153	148
TV via Internet	107	120	109	106	98	94
YouTube	114	137	120	95	121	94
Facebook	93	85	82	97	88	107
Social media other than Facebook	83	90	92	86	70	101
Online ads via PC/tablets	97	90	92	109	88	94
Online ads via smartphone	87	68	92	95	79	81
Radio	104	94	92	115	88	87
Large outdoor billboards or posters	125	77	92	123	116	94
Indoor Posters	97	77	60	106	107	81
Movie theatre	111	94	87	103	112	87
Newspaper	111	124	98	100	112	74
Magazine	104	124	87	103	130	101
Emails from companies	83	98	98	80	84	141
Advertising mailings	100	98	125	97	88	114
In-store Circulars or Flyers	87	90	92	86	88	94
Free Samples*	59	73	136	66	79	114

#1 medium

#2 medium

* Interpret these results carefully as “free samples” wasn’t defined and it’s hard to know what each respondent was assuming for this question

Spend for impact: Stronger drivers by brand objective

Base: **Beer**

N = 501

TP Influence (INDEX) - Beer	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	126	167	124	134	148	129
TV via Internet	102	109	107	102	111	108
YouTube	112	122	107	112	111	101
Facebook	88	90	79	96	99	86
Social media other than Facebook	88	96	90	93	93	86
Online ads via PC/tablets	93	96	79	99	86	86
Online ads via smartphone	88	83	79	96	68	79
Radio	107	103	90	115	93	94
Large outdoor billboards or posters	121	77	102	118	123	101
Indoor Posters	112	90	102	109	99	86
Movie theatre	93	90	90	83	99	86
Newspaper	84	77	73	80	80	79
Magazine	102	90	90	99	117	72
Emails from companies	74	96	85	86	80	122
Advertising mailings	93	96	90	96	80	86
In-store Circulars or Flyers	98	96	107	89	99	108
Free Samples	121	128	203	93	117	194

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Toothpaste**

N = 500

TP Influence (INDEX) - Toothpaste	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	148	179	143	149	171	146
TV via Internet	100	112	85	101	99	73
YouTube	96	128	85	101	99	86
Facebook	88	95	69	84	77	73
Social media other than Facebook	80	67	79	88	88	73
Online ads via PC/tablets	84	89	74	94	83	73
Online ads via smartphone	72	67	79	91	77	66
Radio	84	106	69	97	83	86
Large outdoor billboards or posters	108	67	74	123	94	86
Indoor Posters	104	73	74	114	105	93
Movie theatre	84	61	63	88	88	73
Newspaper	92	95	79	81	99	79
Magazine	112	117	95	107	122	93
Emails from companies	84	95	85	84	88	119
Advertising mailings	104	117	116	88	88	113
In-store Circulars or Flyers	112	89	148	114	105	146
Free Samples	148	140	286	97	133	219

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **QSR**

N = 501

TP Influence (INDEX) - QSR	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	122	154	131	136	151	137
TV via Internet	87	100	81	98	93	84
YouTube	98	114	97	100	107	89
Facebook	91	95	85	92	98	79
Social media other than Facebook	91	90	81	89	83	84
Online ads via PC/tablets	87	104	85	95	83	89
Online ads via smartphone	84	75	76	87	73	79
Radio	115	109	93	125	93	89
Large outdoor billboards or posters	122	70	114	130	98	84
Indoor Posters	112	90	102	103	93	89
Movie theatre	94	95	89	98	107	79
Newspaper	91	80	85	98	98	74
Magazine	91	95	76	79	98	79
Emails from companies	80	95	85	87	98	132
Advertising mailings	119	100	127	106	98	126
In-store Circulars or Flyers	94	114	106	92	98	121
Free Samples	119	124	191	89	132	184

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Soft Drink**

N = 501

TP Influence (INDEX) - Soft Drinks	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	142	162	137	138	150	134
TV via Internet	92	102	93	95	99	91
YouTube	103	114	88	103	99	102
Facebook	80	96	64	83	99	86
Social media other than Facebook	92	90	69	86	94	86
Online ads via PC/tablets	88	84	64	95	89	91
Online ads via smartphone	77	78	69	89	75	75
Radio	92	90	78	95	85	81
Large outdoor billboards or posters	115	78	98	121	117	97
Indoor Posters	111	72	108	109	94	91
Movie theatre	100	96	108	121	113	124
Newspaper	88	84	78	95	80	86
Magazine	96	96	98	103	117	81
Emails from companies	80	114	78	80	75	102
Advertising mailings	92	102	103	80	99	102
In-store Circulars or Flyers	111	90	123	109	94	108
Free Samples	142	156	245	98	122	161

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Online Travel**

N = 502

TP Influence (INDEX) - Online Travel	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	132	169	135	140	139	146
TV via Internet	104	119	109	98	104	97
YouTube	110	142	114	108	127	104
Facebook	110	105	105	114	98	104
Social media other than Facebook	92	100	100	102	92	76
Online ads via PC/tablets	104	91	109	114	87	97
Online ads via smartphone	86	73	87	114	81	90
Radio	104	96	105	98	92	111
Large outdoor billboards or posters	110	68	79	111	92	83
Indoor Posters	101	73	79	95	92	76
Movie theatre	98	91	79	86	110	83
Newspaper	95	105	105	83	104	76
Magazine	107	96	92	92	116	97
Emails from companies	86	100	105	92	75	125
Advertising mailings	98	100	105	95	92	90
In-store Circulars or Flyers	80	87	92	86	92	90
Free Samples	80	82	105	73	104	153

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Male**

N = 968

TP Influence (INDEX) - Male	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	134	161	136	138	158	146
TV via Internet	98	102	103	104	105	88
YouTube	102	124	109	104	111	102
Facebook	91	86	71	88	88	88
Social media other than Facebook	91	86	87	88	82	80
Online ads via PC/tablets	94	97	82	97	82	88
Online ads via smartphone	83	70	82	91	76	73
Radio	102	108	92	113	94	95
Large outdoor billboards or posters	118	75	92	123	105	88
Indoor Posters	102	86	92	107	99	80
Movie theatre	102	91	87	101	105	95
Newspaper	98	102	92	97	88	80
Magazine	102	113	92	97	123	95
Emails from companies	79	91	87	85	82	117
Advertising mailings	98	97	103	91	88	102
In-store Circulars or Flyers	94	97	109	91	99	109
Free Samples	106	113	179	82	117	175

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Female**

N = 1039

TP Influence (INDEX) - Female	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	135	163	139	132	148	130
TV via Internet	101	119	97	97	99	89
YouTube	101	124	97	97	108	89
Facebook	98	104	88	103	94	89
Social media other than Facebook	88	89	88	91	84	89
Online ads via PC/tablets	95	84	83	103	84	83
Online ads via smartphone	81	74	79	97	79	77
Radio	101	94	83	103	84	89
Large outdoor billboards or posters	118	69	97	121	108	89
Indoor Posters	108	74	88	106	103	83
Movie theatre	91	84	79	94	99	89
Newspaper	95	94	83	88	103	83
Magazine	105	104	93	97	113	83
Emails from companies	81	109	93	91	89	136
Advertising mailings	101	109	116	97	94	112
In-store Circulars or Flyers	98	99	111	97	99	118
Free Samples	101	104	190	85	113	172

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **18-24**

N = 208

TP Influence (INDEX) - 18-24	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	135	140	120	131	136	116
TV via Internet	103	110	107	92	105	87
YouTube	125	140	124	111	127	110
Facebook	100	106	94	111	100	93
Social media other than Facebook	103	123	107	105	109	105
Online ads via PC/tablets	96	106	90	98	86	93
Online ads via smartphone	100	93	103	121	95	93
Radio	100	97	81	105	68	105
Large outdoor billboards or posters	121	68	94	114	109	87
Indoor Posters	103	85	90	98	86	93
Movie theatre	103	93	90	95	105	87
Newspaper	82	93	73	78	91	64
Magazine	85	89	77	85	100	70
Emails from companies	75	89	90	92	86	134
Advertising mailings	89	72	90	85	86	99
In-store Circulars or Flyers	75	85	94	85	86	105
Free Samples	103	114	179	98	123	163

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: 25-34

N = 422

TP Influence (INDEX) - 25-34	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	133	145	124	131	137	128
TV via Internet	102	123	96	100	103	103
YouTube	114	127	110	112	123	122
Facebook	118	114	96	109	108	90
Social media other than Facebook	106	105	101	100	93	96
Online ads via PC/tablets	98	95	92	106	93	90
Online ads via smartphone	94	86	96	106	88	71
Radio	98	100	78	103	83	83
Large outdoor billboards or posters	114	82	87	125	108	96
Indoor Posters	102	82	101	100	103	83
Movie theatre	102	95	87	100	108	96
Newspaper	90	86	92	85	83	71
Magazine	98	100	96	97	113	83
Emails from companies	71	91	83	82	69	122
Advertising mailings	86	86	96	85	83	96
In-store Circulars or Flyers	86	95	101	82	98	103
Free Samples	90	86	161	76	103	167

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: 35-44

N = 428

TP Influence (INDEX) - 35-44	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	130	169	145	127	149	124
TV via Internet	109	118	104	109	103	90
YouTube	109	123	93	103	109	97
Facebook	94	97	83	91	86	90
Social media other than Facebook	83	77	83	91	86	90
Online ads via PC/tablets	94	87	83	97	86	90
Online ads via smartphone	83	77	83	94	80	83
Radio	105	97	88	103	91	83
Large outdoor billboards or posters	116	72	104	121	109	90
Indoor Posters	101	72	83	106	103	76
Movie theatre	98	87	83	106	91	90
Newspaper	94	97	78	91	97	83
Magazine	105	97	88	97	120	90
Emails from companies	76	103	88	83	91	131
Advertising mailings	94	108	109	94	86	103
In-store Circulars or Flyers	98	103	114	97	97	110
Free Samples	109	118	192	88	120	186

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: 45-54

N = 457

TP Influence (INDEX) - 45-54	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	141	164	140	130	166	147
TV via Internet	99	101	100	101	102	80
YouTube	92	122	100	95	107	86
Facebook	88	85	65	92	91	92
Social media other than Facebook	88	74	80	86	75	74
Online ads via PC/tablets	99	90	90	101	80	86
Online ads via smartphone	77	58	65	89	64	74
Radio	102	106	95	107	86	92
Large outdoor billboards or posters	113	74	95	121	96	86
Indoor Posters	106	79	95	115	107	80
Movie theatre	95	79	80	95	112	92
Newspaper	95	111	90	98	96	80
Magazine	106	122	100	98	123	92
Emails from companies	92	111	100	92	86	129
Advertising mailings	106	106	110	98	96	117
In-store Circulars or Flyers	95	106	115	98	102	123
Free Samples	106	111	180	84	112	172

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: 55-65

N = 492

TP Influence (INDEX) - 55-65	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	138	199	159	152	178	158
TV via Internet	88	99	85	92	104	86
YouTube	88	99	80	85	86	72
Facebook	78	73	68	79	74	79
Social media other than Facebook	71	60	62	76	61	72
Online ads via PC/tablets	85	73	68	98	80	86
Online ads via smartphone	71	53	62	79	55	65
Radio	110	99	97	117	98	94
Large outdoor billboards or posters	120	73	91	123	104	79
Indoor Posters	117	73	85	114	104	86
Movie theatre	88	79	80	85	92	86
Newspaper	110	119	97	108	117	94
Magazine	113	132	97	104	123	101
Emails from companies	88	113	97	98	92	129
Advertising mailings	120	146	136	111	110	122
In-store Circulars or Flyers	110	99	125	104	104	122
Free Samples	106	113	210	73	117	173

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Under \$50k**

N = 652

TP Influence (INDEX) - <\$50k	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	135	162	136	135	149	142
TV via Internet	100	111	94	92	103	93
YouTube	107	126	103	98	108	99
Facebook	93	101	75	92	87	86
Social media other than Facebook	89	91	80	89	87	86
Online ads via PC/tablets	96	91	85	102	87	86
Online ads via smartphone	78	71	85	98	77	74
Radio	96	96	89	105	82	93
Large outdoor billboards or posters	117	76	94	123	97	86
Indoor Posters	110	71	94	111	108	86
Movie theatre	89	81	75	95	97	86
Newspaper	96	101	85	92	97	74
Magazine	100	106	94	95	118	86
Emails from companies	82	101	99	92	92	123
Advertising mailings	107	106	117	98	92	111
In-store Circulars or Flyers	100	106	113	98	108	117
Free Samples	107	106	183	83	113	167

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Income \$50,000 - \$99,999**

N = 699

TP Influence (INDEX) - \$50-99k	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	129	161	139	132	148	123
TV via Internet	99	104	91	102	106	90
YouTube	99	120	96	99	111	90
Facebook	99	99	87	99	95	90
Social media other than Facebook	84	83	91	93	85	90
Online ads via PC/tablets	91	89	87	102	90	90
Online ads via smartphone	84	78	82	96	74	71
Radio	106	104	87	111	90	90
Large outdoor billboards or posters	118	73	96	123	111	90
Indoor Posters	106	83	96	105	101	84
Movie theatre	95	89	87	93	101	90
Newspaper	99	94	87	93	95	84
Magazine	106	104	87	96	116	90
Emails from companies	84	99	87	90	79	129
Advertising mailings	103	104	111	93	90	110
In-store Circulars or Flyers	91	99	111	93	95	116
Free Samples	106	115	178	84	111	168

#1 medium

#2 medium

Spend for impact: Stronger drivers by brand objective

Base: **Income: \$100,000 +**

N = 465

TP Influence (INDEX) - \$100k+	Awareness	Understanding	Trial	Top of Mind	Image	Loyalty
TV via traditional broadcast	138	160	140	132	162	142
TV via Internet	104	124	112	103	110	88
YouTube	104	129	106	103	110	101
Facebook	97	82	84	100	92	88
Social media other than Facebook	93	88	84	91	75	81
Online ads via PC/tablets	93	93	78	97	81	88
Online ads via smartphone	86	72	73	94	81	81
Radio	104	98	89	109	87	81
Large outdoor billboards or posters	119	72	89	124	104	95
Indoor Posters	101	88	84	106	92	81
Movie theatre	108	88	89	103	116	95
Newspaper	90	103	95	94	92	81
Magazine	104	108	101	100	116	95
Emails from companies	75	103	89	82	81	128
Advertising mailings	90	88	106	91	92	101
In-store Circulars or Flyers	93	98	101	91	92	101
Free Samples	101	103	184	79	116	176

#1 medium

#2 medium

DOWNLOAD the presentation

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