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A REVIEW OF PRINT/TELEVISION COMMUNICATION STUDIES

SYNOPSIS

This paper marks a departure from the traditional subjects for this Readership Symposium. It is not concerned with any aspect of readership research as such, but with the conduct of six studies in five different countries designed to examine the way in which print and television advertisements interact with each other, in terms of the messages they communicate.

These studies are intended to provide evidence that advertisers would increase the effectiveness of their advertising expenditure if they were to use a mix of both print and television, rather than spend all their money in television, as many large-budget fmcg brands in the UK and US are likely to do.

The paper introduces the subject with a few background comments to explain why this series of studies should have been carried out at this point in time. It then summarises the research designs used in the different countries and highlights the findings.

After making some further general comments, The paper concludes with information on a proposal by the International Federation of the Periodical Press (FIPP) to produce an international brochure and video covering these research studies. This material is to be funded by publisher associations and others and would be intended for use by national publishers in their advertisement sales activities.

INTRODUCTION

The early thinking which lead to the design of the studies which are described in this paper took place in the UK in the late 1970's, but the trigger for the recent wave of projects was a UK study carried out in 1986. This 1986 study was commissioned by a group of magazine publishers and was designed specifically to provide sales material to enable the publishers to challenge the media strategies of many of the large-budget fast moving consumer goods advertisers who spent all, or virtually all, their money on television.

The need for such work can be seen from the following table which shows the press share of ad expenditure for the Top 100 UK advertisers in 1989. The position in 1985/86, when the first study was carried out, was virtually identical.

Table 1

ANALYSIS OF EXPENDITURE OF TOP 100 UK SPENDING BRANDS IN 1989

	FMCG's	STORES	CARS	FINANCE	REST
No. of brands	27	23	17	11	22
	%	%	%	%	%
Press share:					
None	37	-	-	-	-
Less than 9%	44	4	-	18	5
10 - 49%	15	22	53	45	33
50 - 89%	4	61	41	36	24
90%+	-	13	6	-	38

The reason for the publishers' concern is immediately apparent from this table. It will be seen that over one-third of all large-budget fmcg brands (Foods, Household Stores, Toiletries and Cosmetics) did not spend any money at all in print, while over 80% of them spent less than 9%. It would be clearly unrealistic for the publishers to hope that any selling strategy of theirs would persuade such advertisers to switch the bulk, if not all, their money from television into print, but it seemed reasonable to believe that there was a good chance for switching a minority proportion.

After all, we are talking about the effectiveness of advertising expenditure at the margin, that is we are talking about the shape of the response function, and while there is plenty of theorising about this subject there is

virtually no factual evidence. So the publishers could be confident that the advertisers who spent all, or virtually all, their money on television didn't actually know whether or not this was better for them than an integrated mixed print and television strategy.

At this stage it is also relevant to comment that whereas publishers from many different countries have shown considerable interest in this work, they come to the problem from two very different start positions. Active support has come from publishers in countries with well developed commercial television, such as the UK and US, who have the objective to reclaim money currently committed to television. In contrast, the objective of publishers in other countries, such as Germany, Denmark, Sweden and Norway, where commercial television is just beginning to become important, is to prevent advertisers from adopting a distorted, television-only strategy.

REASONS FOR MIXED MEDIA ADVERTISING

There are two broad groups of reasons why an advertiser should adopt a mixed media strategy. The first group of reasons are all concerned with the nature of the audiences reached and the extent to which a media mix will provide a better balance of reach and frequency than a single medium. This group of reasons are thus all centred on scheduling considerations, and hence depend very much on the readership papers which are the lifeblood of this Symposium. They are not our concern in this paper, however.

The second group of reasons centre on various aspects of communication, including the extent to which the different physical properties of print and television mean that when they are used together, in an integrated fashion, they support and supplement each other. In this way, the total communication achieved is better for the advertiser than the communication which either medium can achieve on its own.

COMMUNICATION STUDIES

The communication studies described in this paper are designed to examine the nature of this interaction between print and television. The paper summarises 5 of the 6 studies of this type which have been carried out, while the sixth one, which is still on-going, will be described in more detail by the next speaker.

In outline, the basic approach used by all these communication studies has been similar to the research

designs employed by many agencies for pre-testing purposes.

Respondents, broadly speaking in the target market for the campaigns being studied, are recruited and shown different combinations of print and television advertisements, usually in a hall interviewing situation. A varying series of pre- and post-exposure questions are asked and comparisons made between balanced sub-samples, each receiving a different pattern of ad exposure. The sample sizes have tended to be on the small side, but no smaller than the samples used by agencies for pre-testing advertisements.

The first of these communication studies was carried out in the UK in 1986. It was sponsored by a group of magazine publishers, covered 7 mixed magazine and television campaigns, and employed two slightly different research designs.

For 3 campaigns a balanced design was employed, with half of each sample (about 45 people) seeing a television advertisement, followed by a print ad and a repeat showing of the television ad, all for the same brand, while the other half of the sample saw the sequence print/television/print. In all cases, and after each showing of an advertisement, a standard open-ended question was asked, along the lines;

"Please tell me everything that passed through your mind whilst you were looking at the advertisement, whether or not your thoughts were actually connected to it".

Although properly balanced this design had the weakness that it was not possible to make any comparison between 2 TV exposures and 1 TV and 1 print exposure, so for this reason a slight change in the design was employed in the second part of the study, covering 4 campaigns. In this case one half of each sample saw a TV advertisement followed by a filler print advertisement and a repeat of the television ad, while for the other half of the sample the filler print ad was replaced by the print ad for the same brand as the two television advertisements.

The report on this research was published with the title The Media Multiplier. The conclusion reached was that television and magazines working together in a campaign produced fuller, richer, and more effective communication than either medium on its own. It was explained that using two media in combination enables each to achieve its own particular kind of communication, whilst allowing the consumer perceptions from the one to feed off, and enhance, the perceptions from the other. Thus each multiplied the effect of the other.

This first study was given an award by FIPP, the

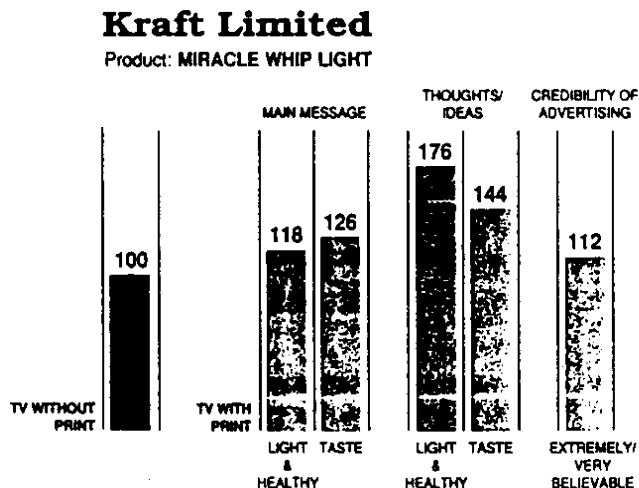
International Federation of the Periodical Press, because it was judged to be the best piece of research undertaken in 1986 to promote the interests of magazine publishers.

The publicity arising from this award led a Canadian group, made up of MacLean-Hunter, Reader's Digest, Telemedia Publishing and MacLaren:Lintas, to undertake a similar study in late 1988, covering 4 campaigns. They judged that it was a weakness of the UK design that the respondents were asked potentially repetitive questions about the advertising for the same brand in either two or three stages of the interview, so they developed what they considered to be an improved version.

The Canadian design was as follows:

- Step 1 the respondent was exposed to 2 print ads, A and B
- Step 2 questions were asked about the impact of print ad A only
- Step 3 the respondent was exposed to 2 television ads, B and C
- Step 4 questions were asked about the impact of both television ads, B and C

An example of the results obtained from this Canadian study is given in the chart below, relating to the Kraft Miracle Whip Light campaign



The Canadian design was certainly a very neat way of avoided the UK weakness of repetitive questions, but in turn it had a different weakness. As will be seen from the diagram, the main comparisons made were between a one exposure level (TV without print) and a two exposure one (TV with print), so it could be argued that the differences

noted were more the result of the exposure level than the media mix.

Evidence from the second UK study suggests that this is not likely to be a particularly valid criticism, while the similarity between the conclusions drawn from this study and the others is striking.

- Adding print to TV contributes more than adding more TV.
- Print communicates additional ideas to those derived from TV alone.
- Print can affect and enrich what is understood from exposure to TV.

The Canadians also came to another very important conclusion. Namely; that the impact is strongest when creative execution and advertising concepts are complementary for both media.

The third study of this type was carried out in the Netherlands. It was commissioned by Admedia and Lintas and covered 11 mixed TV and magazine campaigns. Two research companies were used, one employing hall interviews, while the other one did their interviewing at home. Both research companies used as controls subsamples who had seen the television ads only.

The questions used by both research companies were the same, although they were asked in slightly different sequences. They were as follows:

- All thoughts while seeing the ad
- What the ads were trying to get across
- The messages which were communicated about the brand
- The level of agreement with 10 statements about the brand

The main conclusions which were drawn from this work were as follows;

- TV + print created more positive responses than TV on its own, for all campaigns at Questions 1, 2 and/or 3
- At question 4 (involving 10 statements about the ads) the mix of TV + print created more positive responses for 10 out of the 11 campaigns tested.

The fourth project in this series of communication studies was carried out in mid 1989 in Italy, commissioned by the leading magazine publisher, Arnoldo Mondadori. Eight campaigns were covered, using a research design which was

the same as the design employed for the second half of the first UK study,

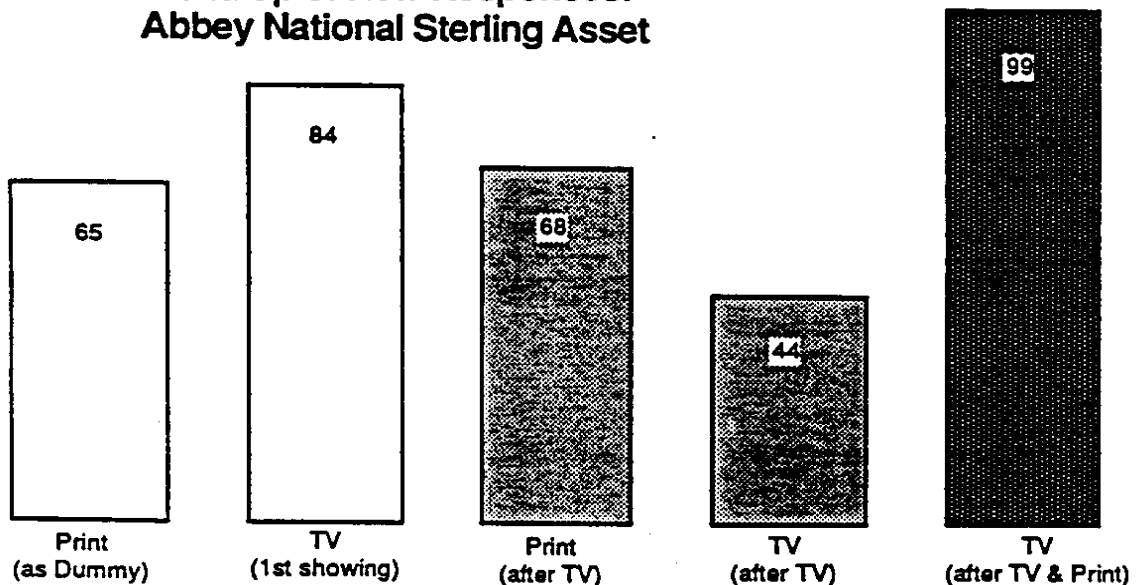
As a result of this work their conclusion was that a mixed television and magazine campaign produced a communication impact which was far superior to that from a single medium.

The fifth study was again carried out in the UK. This time the study was commissioned by the Press Research Council, a body representing the interests of both newspaper and magazine publishers, so consequently the research covered both newspaper and magazine ads. A total of 12 campaigns were covered, by two research companies who used the same basic design as the one used for the second part of the first UK study, and also for the Italian study. That is, one half of each sample saw the sequence TV/print/TV, while the other half saw the sequence TV/filler print/TV.

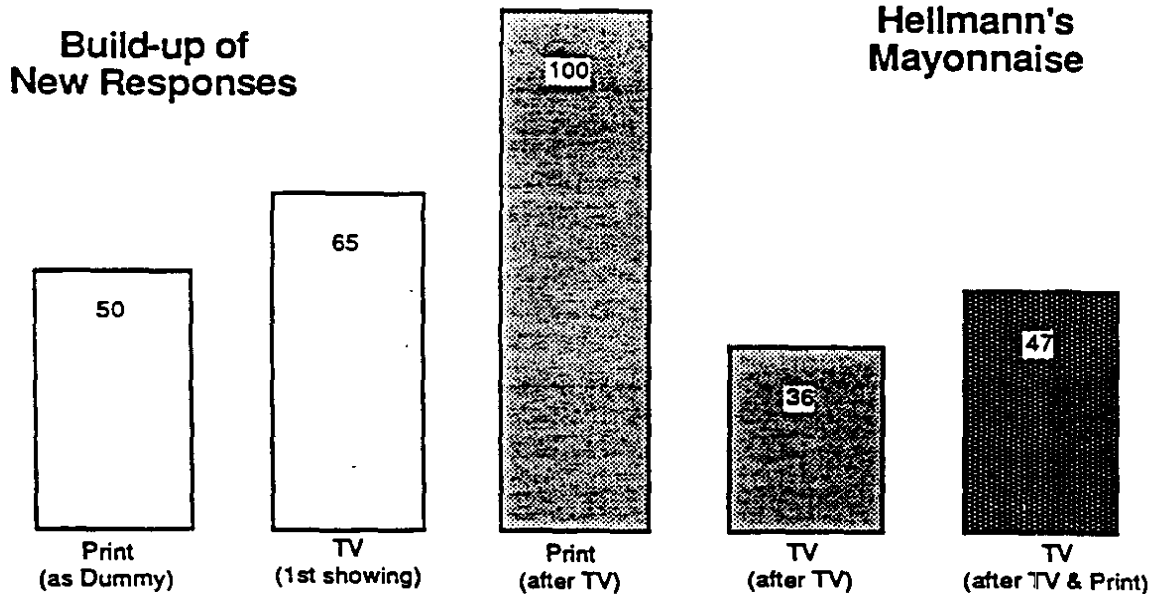
One of the research companies involved in this second UK project had also carried out the first study, so they used the same questioning approach as described earlier in this paper. Their experience with that earlier study, however, led them to devise a tighter analysis framework. For the second study, and after each ad exposure and question, they identified all new thoughts which the advertisement had generated.

In the case of the Abbey National Sterling Asset campaign (for investments) the diagram below shows that the most powerful communication took place at the second showing of the TV commercial, seen after a print ad for the same product had been seen. At this stage the communication achieved was higher than the level at any other exposure and over double the second TV level without an intervening matched print ad. In response function terms, this diagram suggests a rapid fall away for a television-only campaign, but increasing marginal effectiveness for a mixed print and television one.

Build-up of New Responses: Abbey National Sterling Asset



As is to be expected, different campaigns produced different patterns of new responses. The main characteristic of the one for Hellmann's Mayonnaise below is that the TV treatment integrated very positively with the print ad, to generate the highest level of response.



The questioning approach of the other company used for the second UK study may be illustrated by the following question;

"I'd like you to imagine you have been watching this advertisement when a friend was out of the room. How would you describe it to the friend"

The responses to such questions were not analysed in terms of new responses, but one of the advantages of the semi-qualitative questions employed by both UK research companies is that since the responses were recorded verbatim, they could be studied so as to gain an insight as to how the messages conveyed by the two media interact with each other.

As a result of this work no fewer than 10 different ways in which this can happen were identified. These ways are described in detail in the published report, but for this paper I can only list them.

When used in conjunction with television, print can:

1. Lead people to see the commercial in new ways, and look for details
2. Encourage more response to the commercial

3. Add extra information or messages
4. Re-inforce the TV message
5. Expand the TV message
6. Help understanding of the TV message
7. Strengthen brand identification
8. Make the product seem more accessible
9. Focus more on product-orientated messages
10. Create a more positive feeling towards the product

It seems to me that this list provides an excellent first step towards the next stage in our study of the communication advantages of a mixed print and television media strategy. Namely to understand why and how the interaction takes place, with a view to exploiting it to the fullest possible extent.

The next speaker is going to describe the sixth, and most ambitious, of these communication studies, and I am certainly not going to steal her thunder in any way. However, I do urge you to take note of the way in which the sponsors of the project see it as the start of a learning process. May I wholeheartedly express my agreement with this belief.

The series of 5 studies which I have described, plus the first wave of the American study, have now covered 44 campaigns for brands from many different product fields. Because of this wide coverage, no one can argue with real conviction that the interaction which has been identified will not operate for their brand or in their country. The property is universal.

Overwhelmingly the results are in agreement that TV plus print makes the advertising budget work harder than TV on its own.

FURTHER WORK

From now on it seems to me that the publishers responsible for this wave of studies, and others, have three main tasks:

1. They need to communicate the results of this work to all major advertisers and agencies, actively and in all major countries. Increasingly advertisers and agencies are becoming multi-national in their thinking and planning,

so the publishers need to respond in kind. Not just once but many times, since there is a major education task to be undertaken.

This is why I am very pleased to be able to tell you that under the auspices of FIPP a group of publisher associations, major publishers and other interests are planning to produce a brochure and supporting video which summarise all the lessons so far learnt from this work.

The intention is that this material should be used by print ad sales personnel, on a worldwide basis, to support their normal selling activities.

2. They need to undertake more marketplace studies, so that it is possible to demonstrate the benefits of a mixed print and television strategy in terms of sales, brand shares and brand images. Some studies of this nature have already been carried out, notably in Germany and South Africa, but more are needed, and again I have reason to applaud the plans of the Americans.

3. They need to devise appropriate research methods for testing creative strategies and executions to ensure that maximum advantage is taken of the between-media interaction opportunities.

Once suitable research methods have been devised it will be a question of creating partnerships between publishers, advertisers and agencies to conduct experimental studies, involving alternative creative treatments, to seek out the best execution strategies. In this work it will be essential for the agencies to contribute the creative thinking and executions, but the publishers must be prepared to contribute substantially to the cost of the work. It would be both unrealistic and wrong for them to expect anyone else to pay for their basic product development research.

Will all this happen? I don't know, but I challenge anyone to deny that it makes sense. Of course it will be said that such a programme will be too expensive, but this isn't really the case. The truth is that because of the commission system the publishers have been isolated from realising that it was their basic responsibility to understand how the product they sell in the media market should be used.

In the years to come I am quite sure they will come to see that this stance less and less satisfactory. Readership and all other aspects of scheduling research is necessary, but not sufficient.

In arguing that publishers need to get involved in questions of creative strategy and execution, in terms of

understanding and education, I would go so far as to suggest that the television contractors would gain as much as the print owners from learning how to maximise the benefit from integrated print and television advertising.

The explanation for this comment is very simple. There is no doubt that in the last twenty or thirty years traditional advertising, basically print and television, has lost out substantially to other forms of promotion activity. People talk of a 50% loss of share, drastically affecting both print and television ad revenue.

One way for the traditional media owners to fight back would be to improve the efficiency with which their product is used, with the communication studies I have described suggesting that a print and television mix is better than television on its own. However, I cannot see such cooperation developing, although it would make great sense for a company or companies with both publishing and television interests.

Where are you, Mr Rupert Murdoch?

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