

WHEN LATE LEFT BEATS EARLY RIGHT

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When OMD was established in Hong Kong in early 1998, one of the challenges was to look at established media and try to find answers to the questions which clients were asking. Media research is frequently highly focused on issues which, while important, are far from top of mind for clients. A recurring question among our clients was a simple one: "How do you support your recommendations on which pages or sections I should advertise in?" Beyond general media observations, the answers were surprisingly difficult to come by. While there was some section readership information available in the ACNielsen Media Index, this was not extensive and it focused on the "usually" word that may conceal real answers within averages of normal behaviour.

We decided to combine two components of print research which have already been developed. The first element was "noting and reading " and the second a battery of quality of reading questions. To do both properly, we limited coverage of titles and focused our research on the publications where our clients spent the most money.

What is interesting about this approach, novel in Asia, is the way in which it has focused industry attention on the media planning applications of noting and reading studies. In the limited sense in which they had been applied before, these were typically viewed as a form of creative assessment rather than media placement.

We have labeled this program "Optimum Impression" and to date we have conducted surveys in Hong Kong, Shanghai, Beijing and Singapore. ACNielsen have been the research partner in each of these markets.

The results have provided valuable insights into reading behaviour in Chinese language and mixed race cultures. For media planning, we have been able to assess whether the ratecard pricing strategies of a newspaper reflects actual media consumption. Perhaps rather startling is that, in some cases, media independents now know more about the medium than does the proprietor.

Objective

As stated above, the objectives are to capture and evaluate quality of reading measures; and detailed noting and reading scores. The range of information collected included:

- Media characteristics for the specific advertisement, such as size, colour, page, position and section in the newspaper
- Creative ad characteristics, such as celebrity, promotion mentioned, copy length, type and size of illustrations
- Interest level in the advertised category
- Demographics eg. age, sex, working/non-working
- Media habits eg. title, time and place of reading newspaper
- Ownership and usage of advertised category

Research Method

Target respondents were aged between 15-54. Copies of the live daily and weekly publications were used during the interview to assess respondents' recall of ads during a face to face interview. The use of ads in the live context of a publication was essential to move the study beyond an ad recognition monitor.

The sample size was 1000 per market in Hong Kong and Singapore, and 600 in China (being a sample of 300 women in each of 2 cities). In Singapore, which has two large minority populations with distinct reading habits, race was also one of the control parameters to ensure race distribution within the sample was in line with the population.

Monitored Publications

Nine publications were monitored per market in Hong Kong and Singapore, which included daily newspapers, weekly and monthly magazines. In China, two women's magazines were tested. To ensure readers had completed reading the issue to be tested, the last issue and not the current issue was monitored. In total, 1755 ads were monitored in Hong Kong and 755 in Singapore which covered a wide variety of ads by size, colour, position, product category and brand. The China survey was focused on only two titles and therefore covered just 40 advertisements, principally for fashion and personal care items.

Ad selection rule

A random number table was used for the ad selection process, to list out all page numbers of the publication in a random order, and as a basis for ad selection. Quotas were used to ensure there was a spread of product categories and adequate measures of key ratecard positions (such as front pages)

Monitored ads

To reduce respondent fatigue, but at the same time avoid wasting valuable interviews, a structure was adopted whereby variable numbers of ads were selected for each respondent depending on how many of the monitored titles they had read. Monitored ads were coded in detail by the research company. This coding was built into the final database to allow analysis of ads that went beyond individual creative treatments and permitted generalisations across ads and markets.

Flow of questionnaire – Reading & Noting section

The following flow of questions was adopted:

- Identify publications read in the last issue period
- If yes, show the last issue to make sure it is the issue read in the last issue period
- If yes, ask if read each section of the issue
- If yes, ask if the respondent noted the selected ads in the section
 - **Noted**- having seen any part of the ad on this page and in this issue
 - **Did not note**-do not remember having seen the ad on this page and in this issue
- If yes, ask level of reading
 - **Read all** – read the whole ad on this page and in this issue
 - **Read most**-read more than half of the ad on this page and in this issue
 - **Read some**-read some part of the ad on this page and in this issue
 - **Have noted but not read**-have seen this ad on this page and in this issue but didn't read it

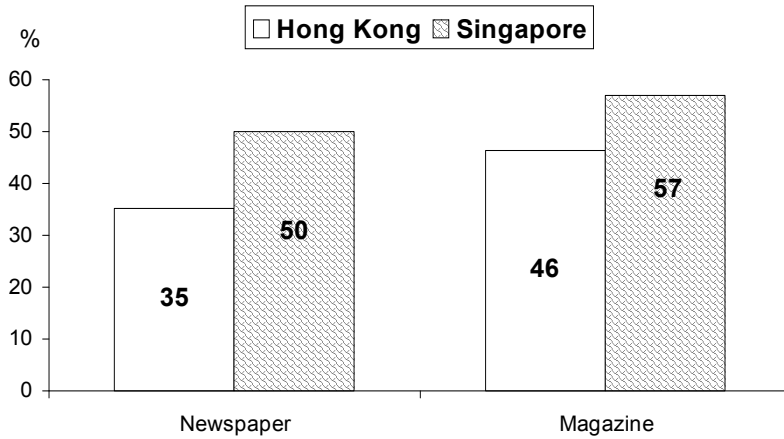
The use of specific issue and ad location was key to minimise the chances of the noting and reading exercise becoming a measure of ad recognition rather than specific issue measurement.

Summarising the methodology, we aimed to collect a large amount of information on how our consumers interact with print advertising. This was aided by sacrificing coverage for depth and detailed classification of the advertising base to build up the analysis options without adding to the interview length.

The Results

Two databases were produced. The first was respondent based and designed to measure "people based" media issues such as time and place of reading. The second database was advertisement based. This was designed to answer questions such as: what percentage of colour ads is noted, or which are more difficult to interpret meaningfully on a respondent basis.

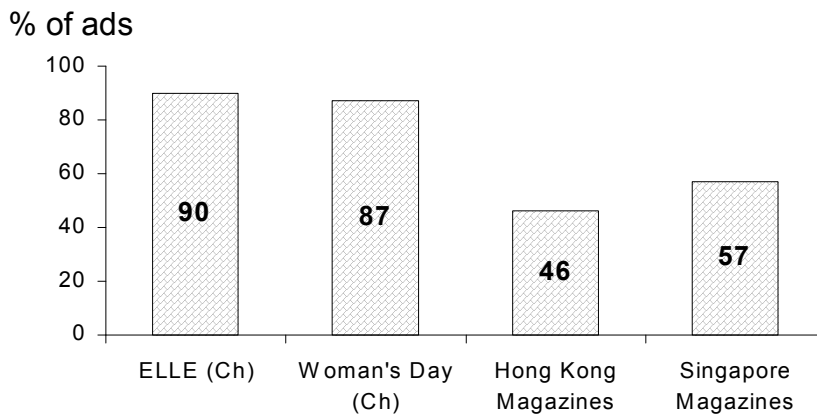
Noting of Ads Hong Kong vs Singapore



Base: AIR of measured newspapers and weekly magazines
Source: Optimum Impression Hong Kong/Singapore

Chart one covers the overall results from the HK and Singapore surveys and shows the percentage of ads being remembered (“noted”). The range of figures for newspapers and magazine ads are similar to those in many Western studies. In each city, it appears that the noting scores are higher for magazines, whilst Singaporeans are either more attentive overall – or are at least more diligent respondents to our survey!

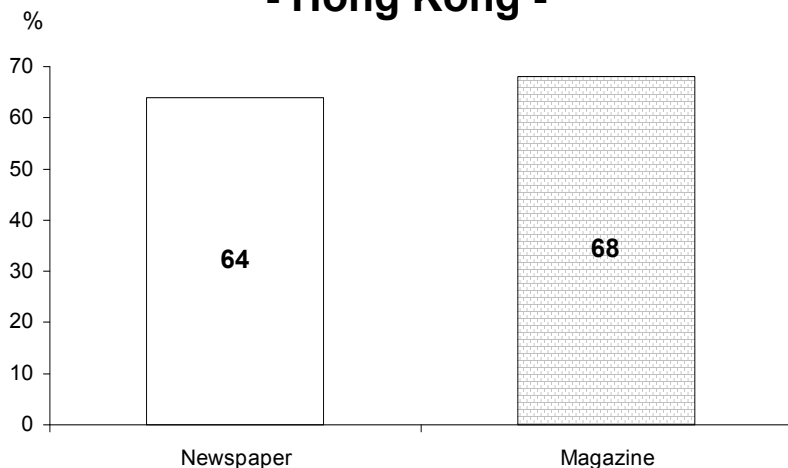
Noting of Ads by Magazines China vs Hong Kong vs Singapore



Base: AIR of measured magazines in China, Hong Kong & Singapore
Source: Optimum Impression China/Hong Kong/Singapore

Chart two demonstrates the results for the Optimum Impression survey that was undertaken in China. It focused on two women's magazines Elle and Woman's Day, against the “benchmarks” in Hong Kong and Singapore. The high cover price and relative novelty of such high quality print work in China probably goes some way towards explaining the extremely high levels of ad noting of around the 90% mark. The figures can only be described as remarkable.

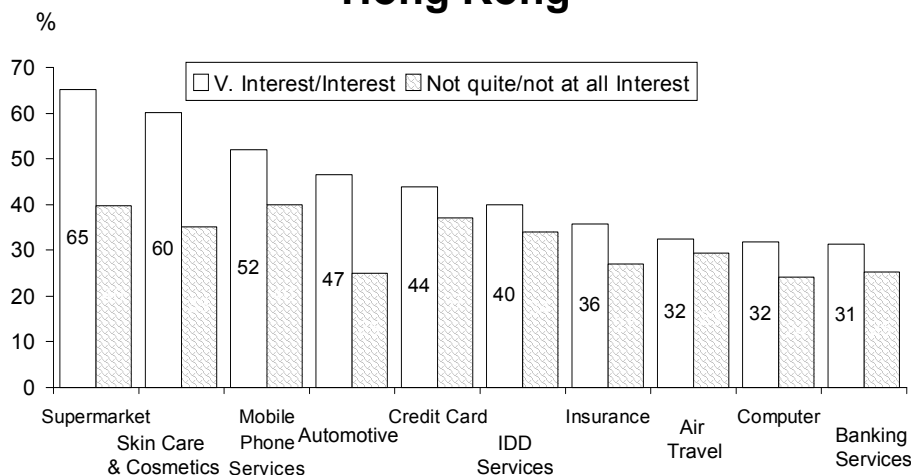
Reading of Ads Reading Most/All of the Material in ads - Hong Kong -



Base: All those who noted the ads
Source: Optimum Impression Hong Kong

Moving to the measures of reading, chart three shows for HK reading levels at the "most or all" level of around the 65% mark. Interestingly, this varies little between print types. We found similar levels of reading in the China survey, despite the big differences in noting.

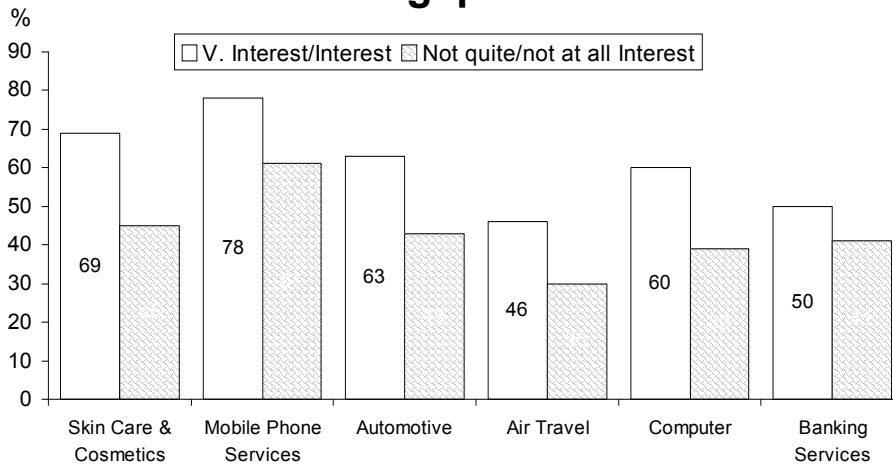
Interest in product = Ad interest? % Noting of Ads - Hong Kong -



Base: All those interested / not interested in respective product categories
Source: Optimum Impression Hong Kong

We found clear differences in noting levels driven by both the product category and the degree of interest expressed in the product category by the consumers. Chart four shows how noting levels vary by category. The intensely competitive and promotion driven supermarket ads attracted the highest attention. For some categories such as automotive, there was a clear ability for consumers to tune out of the ads. Hong Kong has a very low level of car ownership, with less than one in five people having a vehicle. For other more low interest categories such as banking it seemed that noting levels were low regardless of whether an individual considered themselves interested in the category.

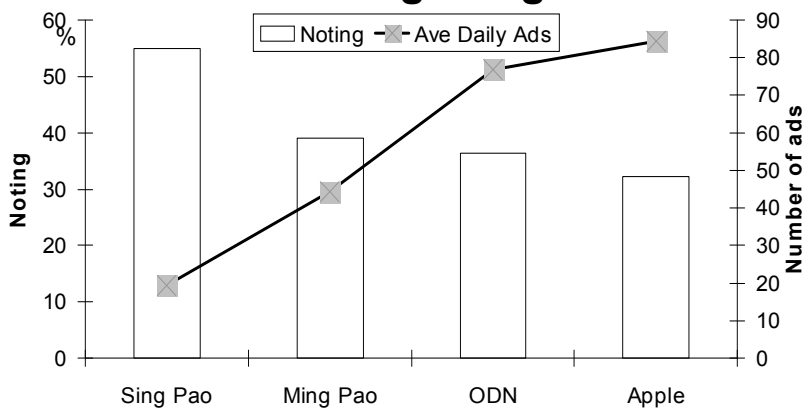
Interest in product = Ad interest? % Noting of Ads - Singapore -



Base: All those interested / not interested in respective product categories
Source: Optimum Impression Singapore

In comparison to Hong Kong, the noting figures for Singapore in chart five showed major differences by product area. Mobile phones were the top scorer: a good indicator of the receptivity of the community at this particular stage of the cellphone “life cycle”. Despite the annual awards for their national carrier as the best in the world, interest in air travel and related noting was bottom of the list: a finding which could not have been predicted with ease.

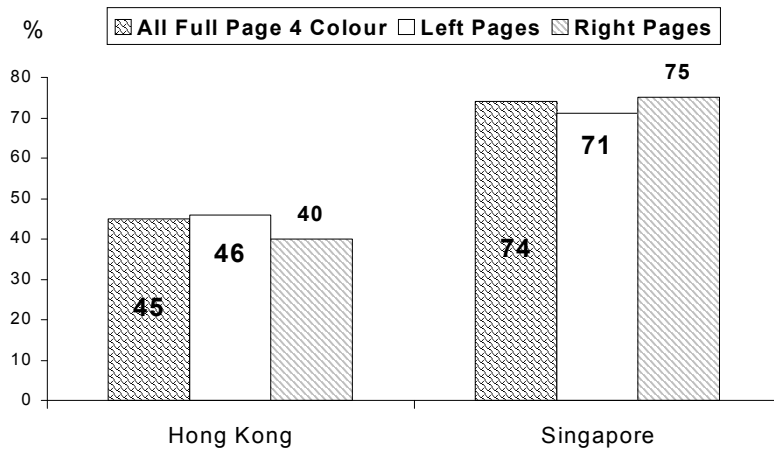
Impact of Number of Ads on Noting Newspapers - Hong Kong -



Base: Yesterday readers of respective newspapers
* small size ads are not included in calculating the ave. daily ads
Source: Optimum Impression Hong Kong
ACNielsen AdQuest

Of keen interest to advertisers was trying to answer the paradox that the more successful publications tend to have the most ads. More ads means more clutter and clutter is bad. We were able to demonstrate some of the negative implications of clutter in a newspaper environment. Chart six shows a clear inverse relationship: lower numbers of ads are matched with an overall increase in average noting levels, and vice versa. There are no doubt many other factors that may contribute to this effect from reader personality to type of advertiser using each title. Part of the analysis follow-up with Optimum Impression has been to use statistical analysis to define the relative importance of the different factors, as the basis of a print planning model.

Value of Left and Right Pages *Full Page Colour Newspaper Ads: Noting*

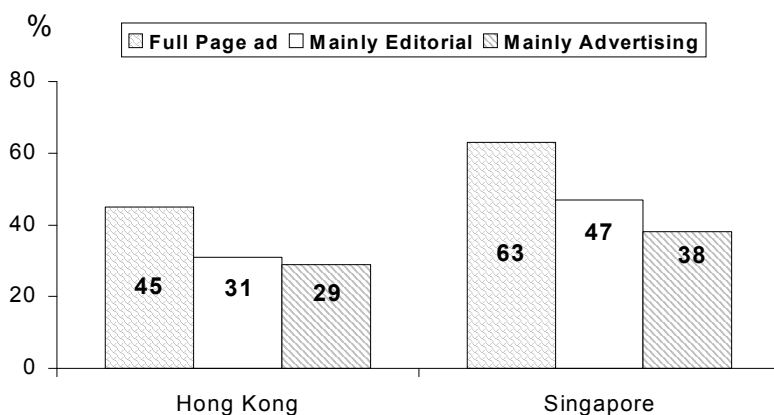


Base: Yesterday readers of newspapers
Source: Optimum Impression Hong Kong/Singapore

So are left hand pages sometimes better than early right? Chart seven returns to the theme of the newspaper. It shows a modest victory of sorts for left hand pages in the Hong Kong data. In the case of full page, full colour ads, the figures are 46% left and 40% right. The figures are more pronounced as left gets earlier and right shifts later for the advertisements measured, although we would prefer to keep the exact scores confidential. For those who may question the methodology or quality of the execution, it is worth remembering one thing. Chinese newspapers are printed and read "backwards" relative to the traditional Western layout. So a victory for left hand pages is only really showing that these figures line up neatly alongside all the other studies in this genre.

By comparison, Singapore newspapers are printed and read in line with the Western style, hence the scores favour right hand pages by a small margin.

Noting of Ads by Material on same page



Base: AIR of newspapers and magazines
Source: Optimum Impression Hong Kong/Singapore

On the final chart, we see that full page ads gain substantially higher noting scores, both in Hong Kong and Singapore. Size does matter, and more so than if a part-page ad occupies space alongside either other ads or editorial matter.

Conclusion

In this paper we have demonstrated the methods we employed and shared some of the insights from the survey. We have found that Optimum Impression has proved of interest to advertisers. We believe this is for a simple reason. It is a research programme that is closely linked to an action after the analysis is over, and those actions can either save clients money or increase the impact of the advertisement. A decision to decline a premium position that delivers a 10% improvement in noting by requiring a 25% premium in ratecard is the sort of research that clients can instantly embrace and relate to. Asian publishers would be advised to link their ratecards to audience performance measures in future.

