

THE MEDIUM AND THE MESSAGE - A COMPARATIVE SURVEY OF PRINT AND TV COPY TESTING PRACTICES AMONG MAJOR ADVERTISERS AND AGENCIES.

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FORWARD

This is the introduction to a very unusual study. A publisher, G+J USA, has investigated advertiser and agency use of copy testing for print. It is part of their larger commitment to work with the industry to help develop reliable systems for improving the effectiveness of print advertising.

It is unusual because media sellers do very little for advertisers on the hard questions. They don't worry about when or whether the advertising they carry is effective. They pocket the money and don't leave a phone number. For all their protests, that is how a commodity sells.

And because sales results are far less than certain, advertisers can't manage their advertising dollars the way they manage other spending. One purchasing manager told us "It's like buying a \$50-million melon. We have to spend the money to find out if it's going to be any good."

As obvious as they seem, these are new ideas. They have been championed by the work of MPA, Millward Brown and Nielsen in print, and John Jones, Colin McDonald and Michael von Gonten in TV. All find the effects of strong advertising messages are immediate and evident. This new focus on advertising as a selling tool makes the development of sales-effective messages a priority.

Historically, magazines have promised only exposures and haven't worried much about sales. Media effectiveness is hostage to creative, yet media suppliers are seldom concerned about the effectiveness of the advertising messages they carry, arguing media's responsibility ends with the contextual delivery of the message to the reader/viewer.

Media pay a high-price for this lack of concern. The uncertainty of a sales response sends advertising dollars to promotion, where results are costly, but predictable. It highlights the internet as a potent, more response-oriented competitor and it encourages CPM buying, which is actually advertisers telling their agencies "if you guys can't guarantee it's going to work, pay as little as possible." For these evident reasons, all media should be interested in helping to improve that state-of-the-art.

The authors believe the development of effective creative is an essential media interest. It isn't 'none of their business,' it could well be the key to their business. We also wonder whether current creative development practices might not favor television, if advertisers and agencies do not pursue the development of print ads with the same rigor as they do TV commercials.

THE STUDY

This is a comparative study of TV and Print copy-testing practices among leading advertisers and agencies. It was conducted for G+J USA by Ephron, Papazian & Ephron and McPheters & Company, during the fourth quarter of 1998 and the first quarter of 1999. It surveyed 24 of the largest advertisers, which as a group spend more than \$2.2 billion annually in magazines and nine of the largest advertising agencies.

The study covers copy-testing policy and practices --- which services are used, how consistently, for which brands and why, the observed effects of copy testing on creative effectiveness and attitudes towards print and TV copy testing.

FINDINGS

Copy testing is almost always advertiser driven. Most of the advertisers surveyed have testing policies -- at least for their TV ads. Many have uniform policies that cut across divisional and national boundaries. A few require that the same suppliers and methodologies be used globally.

Advertisers report 90% of television creative is tested before running, while less than a third of print ads are studied. Copy testing appears to follow the money. Respondents point-out there are fewer print campaigns and they have smaller budgets.

Two-thirds of the advertisers we spoke with have copy-testing policies for TV. Only 14% have a policy on the testing of print ads. A few advertisers suggest print is tested less, because they are less confident of the value of the print copy testing systems available.

A majority of advertisers report copy testing has resulted in better creative. Most feel it has improved their TV advertising. A smaller percent report it has improved print creative.

Several advertisers we spoke with said that they were doing (or planned to do) more print copy testing. One was ordering all print ads be tested. For some this reflected a greater use of magazines. No responding advertiser planned to do less print testing.

Agencies seldom initiate copy testing for either medium. The usual role of the agency is to cooperate in a process controlled by the client. Agencies frequently do qualitative research using focus groups or one-on-ones, early in the creative process. As one agency executive put it, "We believe in doing our homework up-front."

Only two of the agencies interviewed had what might be called a copy testing "policy." One was to discourage the copy testing of their commercials. The other was to do "what the client wants."

Most agencies think copy testing contributes to formula advertising and weak creative. Given the difference in attitudes between advertisers and agencies towards copy testing, it is not surprising that they disagree about whether it produces better advertising.

Agencies believe copy testing is frequently misused. Examples of misuse range from testing copy among groups other than those targeted by advertising, to making wholesale revisions based on diagnostics and then not testing the revision to see if it outperforms the original.

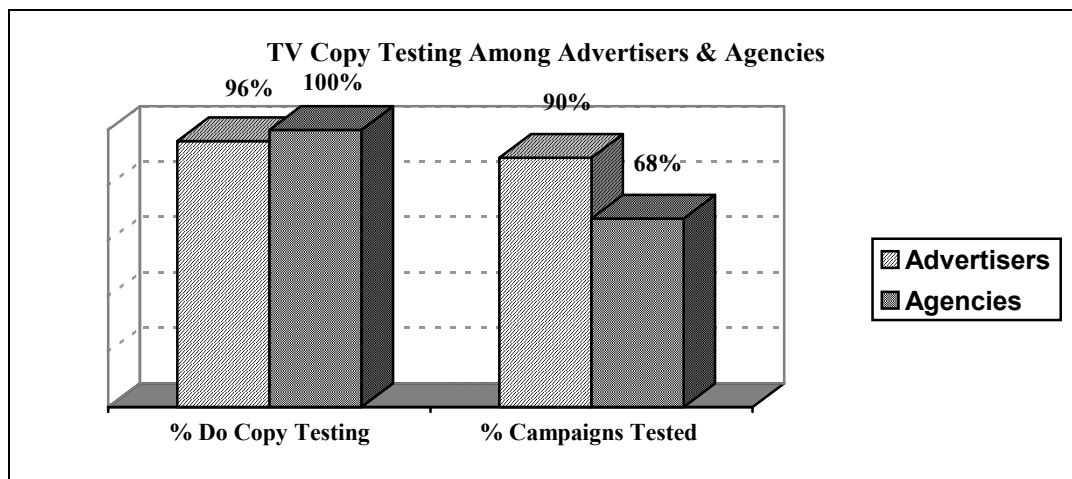
Advertisers are more likely than agencies to welcome a publisher's initiative to facilitate print copy testing. Some advertisers are wary of seller involvement and others would want to see details before deciding. The few that have a print copy testing policy in place tend to be committed to their current system.

DETAILED FINDINGS

TV Copy Testing

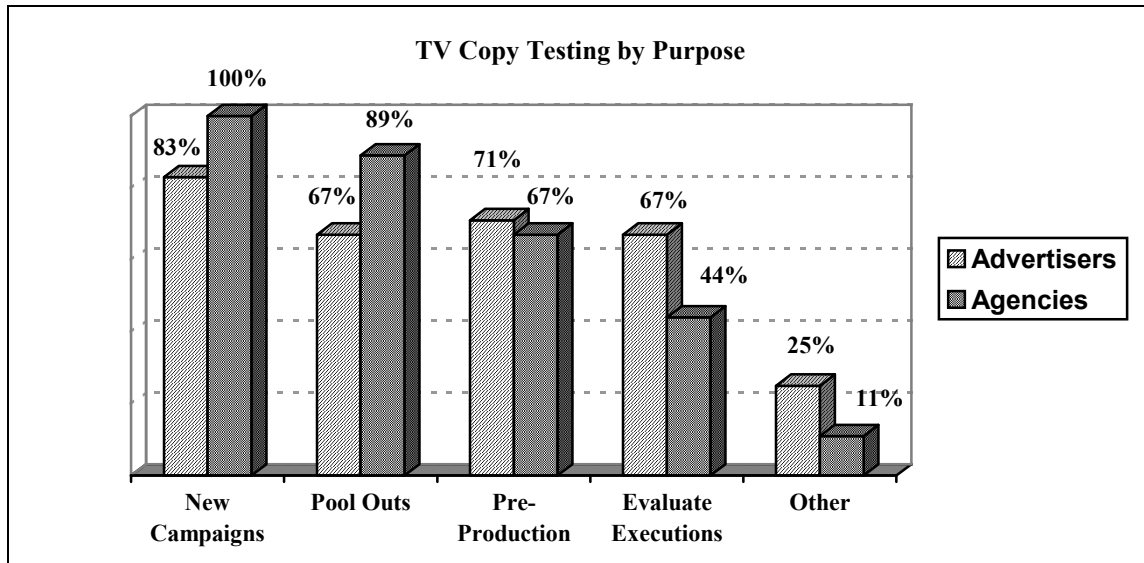
More than 95% of responding advertisers copy test their television commercials. An average of 90% of all campaigns are tested.

All of the agencies we spoke with are involved in copy testing, but they report a lower percent of campaigns tested. A reason for the difference is we interviewed only large advertisers, agencies serve both large and small advertisers, and small advertisers are less likely to test copy.



Advertisers report TV copy testing is most commonly used for new campaigns (83%), pre-production diagnostics (71%), pool outs (67%), and to evaluate relative strengths of different executions (67%).

Several of the respondents said they also test competitive copy. On occasion, copy testing is used to assess the creative approaches of different agencies. Because they do work for many clients, all agencies are involved in the testing of some new campaigns.



The client is the decision-maker who runs the copy testing program, which evaluates the agency's work. Agencies are almost always party to the copy testing process, though rarely to the decision whether to test or the supplier to use.

When asked how agencies fit into the process, one advertiser responded, "As victims". Others described agency participation as "kicking and screaming".

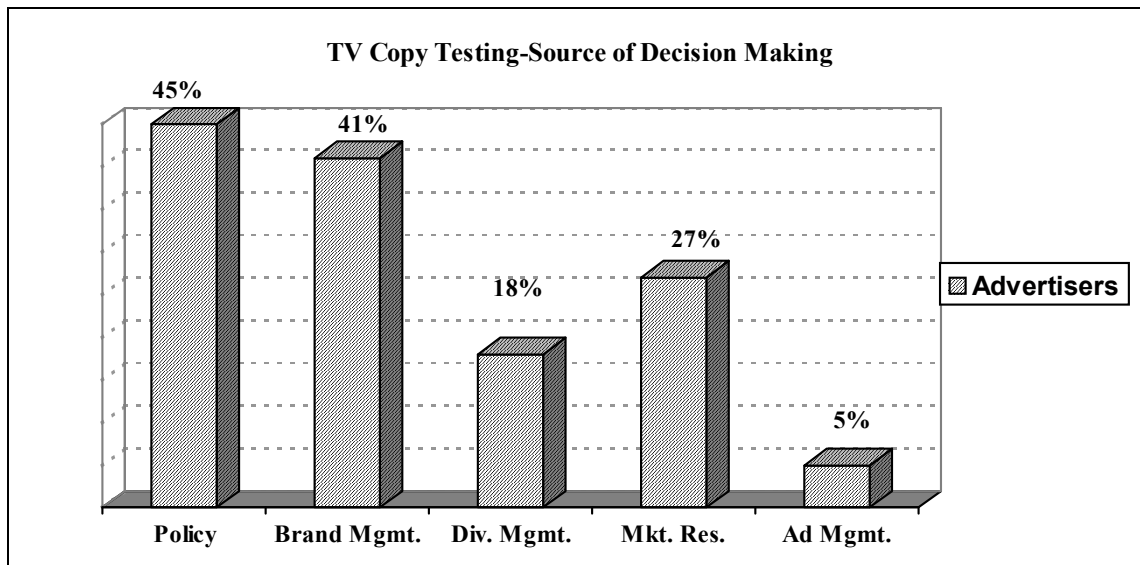
In many cases the agency role is passive. They are given the results, and expected to respond to the diagnostics. However, more than 40% of advertisers involve their agencies in establishment of measures and questionnaire development.

Over a-third of advertisers involve their agencies in determining decision criteria and one advertiser had recently invested substantial time and effort to educate its agencies as to why a specific method was used. This included a review of the extensive validation work that had been done by their supplier.

Agencies themselves are more likely to use qualitative techniques, primarily focus groups, as an integral part of the development process.

For two-thirds of the advertisers questioned, copy testing television ads is company policy. Examples of these policies range from "everything is tested" to "if you test, you will use [supplier name]". In several cases, policy dictates the supplier and method to be used for all new campaigns, worldwide.

Decisions about whether to test are most typically made by the brand group within the context of a testing policy.



Decisions as to whether to test pool-outs are largely a function of how different they are from previous executions. Policies sometimes dictate the testing of pool-outs, which represent a "significant departure." Advertisers say copy testing sometimes provides them with the comfort level necessary to take risks.

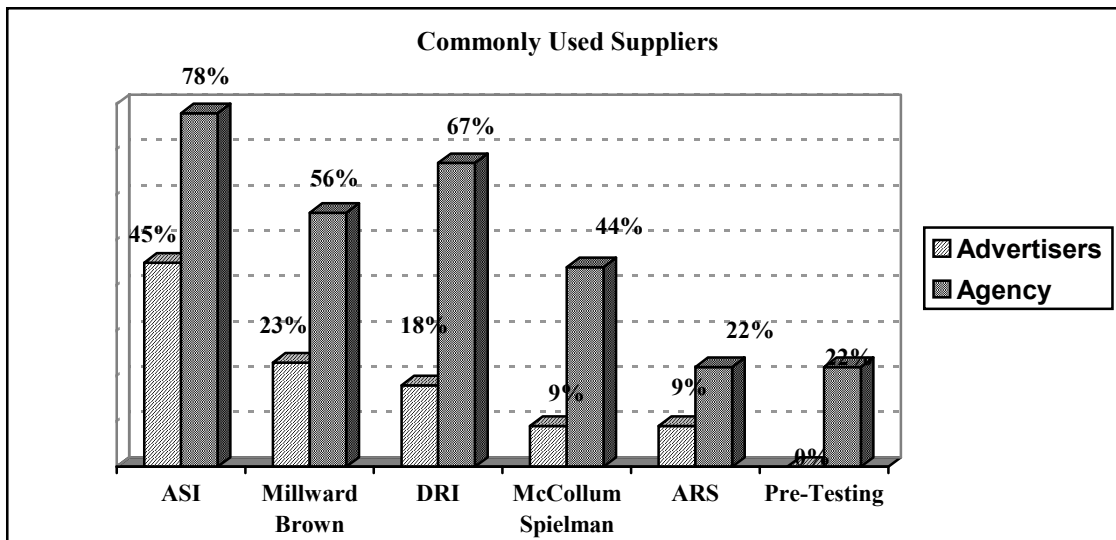
One agency executive said that copy testing occasionally worked to the agency's advantage when it helped to gain client support for campaigns that were significantly different from the brand's previous advertising.

For many of the advertisers we spoke with, the decision not to test requires greater justification than the decision to test.

When asked what factors contributed to their decision whether to test new campaigns, policy/best practice was by far the most common response (68%).

Reasons for not testing included cost (9%) comfort with creative (9%) and the need to get on air quickly (5%).

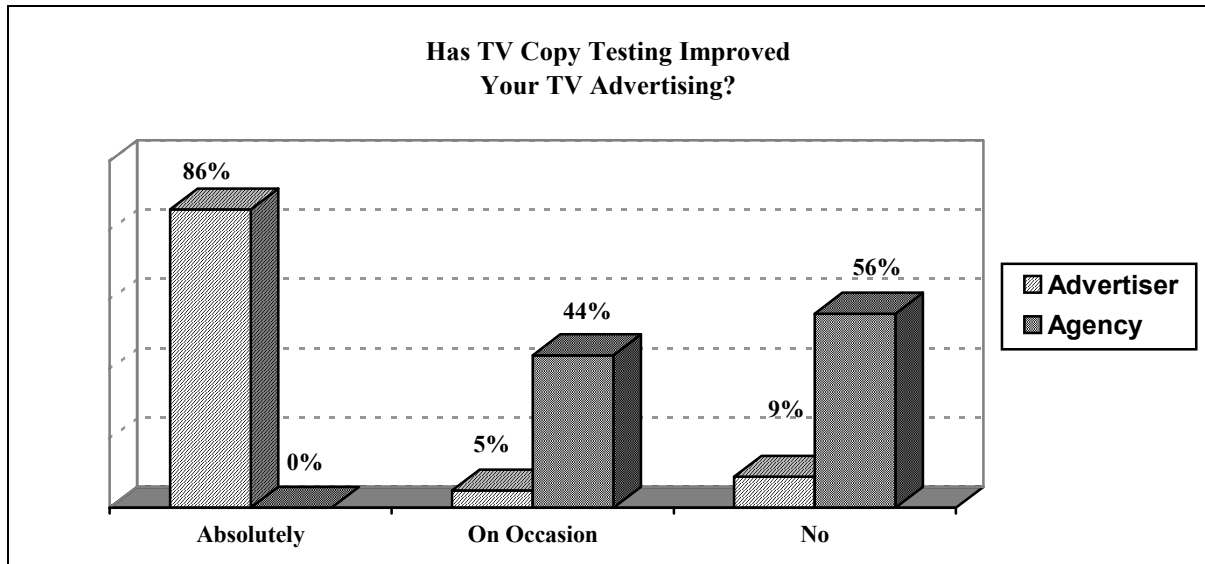
Most agencies and many advertisers have had experience with several suppliers. For both groups, ASI was the supplier most often named. However, in addition to the standard methods, over a quarter use "their own" systems, in most cases along with other services.



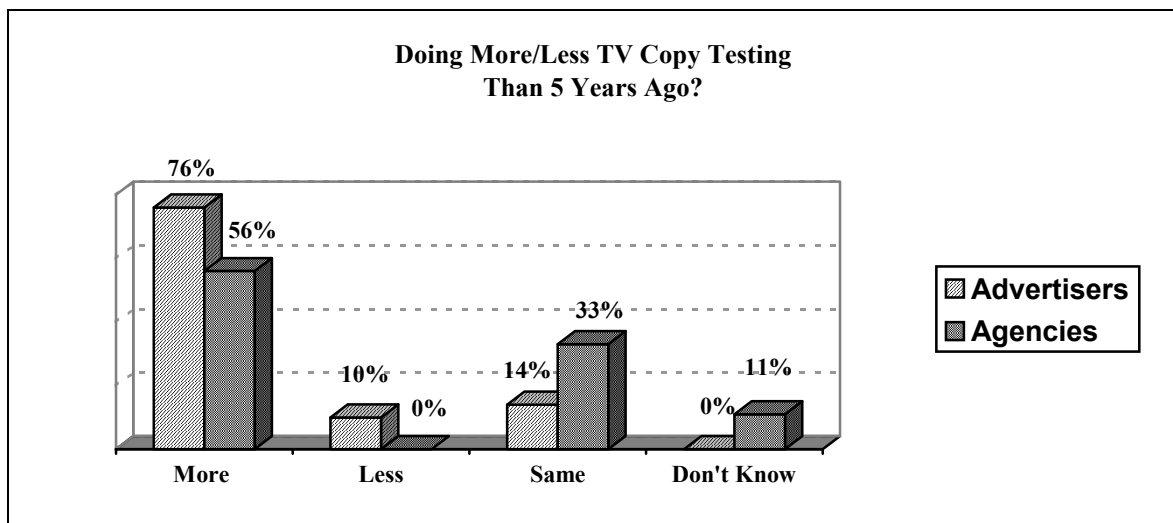
Over half of the advertisers had undertaken a thorough methodological review to aid them in their selection of suppliers. About a quarter used a supplier because a long-standing relationship had resulted in a large category-specific base of normative measures.

Over 80% of advertisers said work had been done, most often within the company, to validate the results of their TV copy testing method. In addition, a number of suppliers were identified as having done work to validate their own systems.

Advertisers and agencies differ in their evaluation of copy-testing's contribution to advertising quality. Advertisers are substantially more likely to say that copy testing improves the effectiveness of their television advertising. More than 90% of the advertisers contacted believe testing has improved TV creative, 56% of agency respondents say it has not.

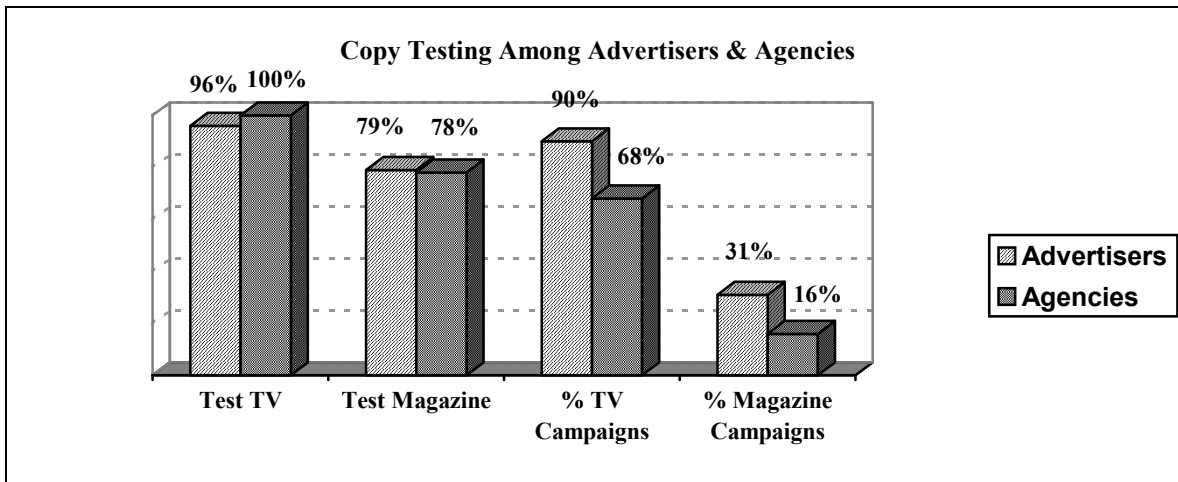


Another indication of the advertisers' confidence in the value of TV copy testing is its use is increasing among both advertisers and agencies. Based on our conversations with advertisers, it appears that concern with advertising accountability and the desire to reduce risk are behind its increased use.

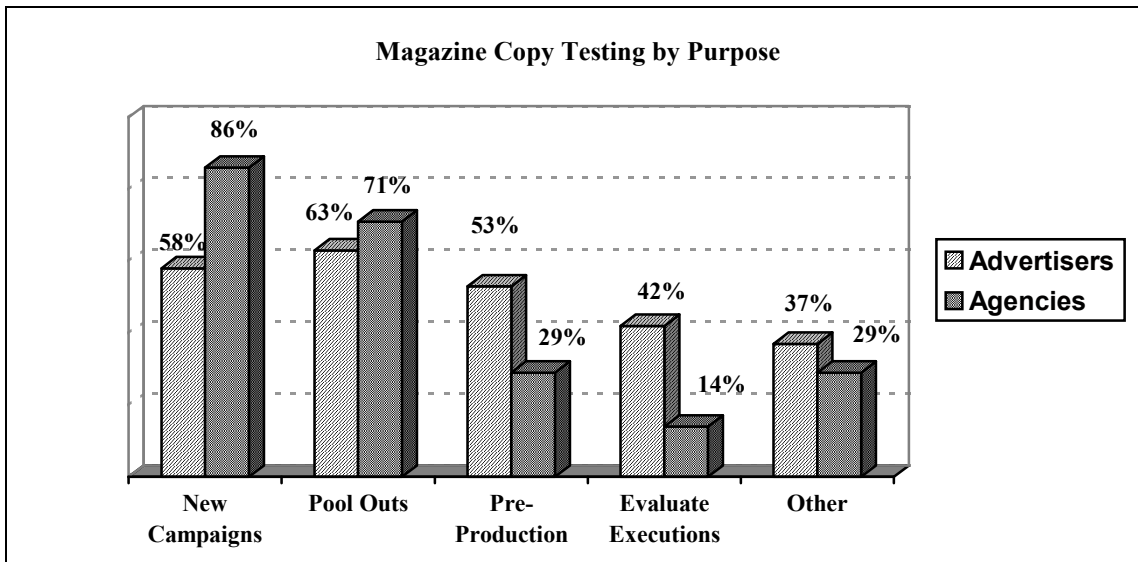


Magazine Copy Testing

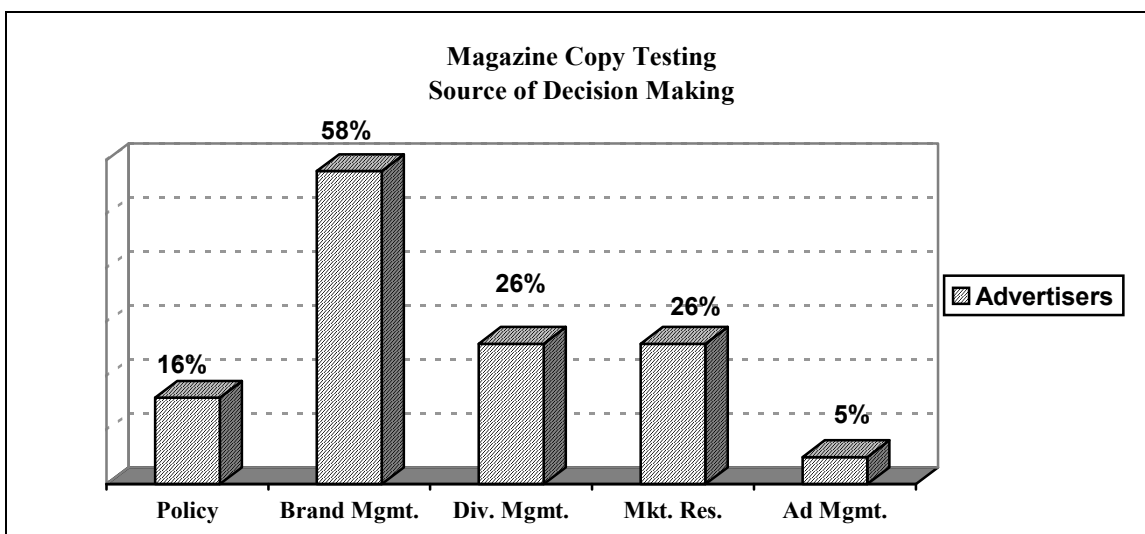
The major difference in the use of copy testing for magazine creative vs. television, is not in the proportion of advertisers or agencies doing it, but in the proportion of total campaigns tested. More than 75% of advertisers and agencies do some testing of magazine creative. However, advertisers report testing less than a third of magazine campaigns, while agencies report testing less than 20%.



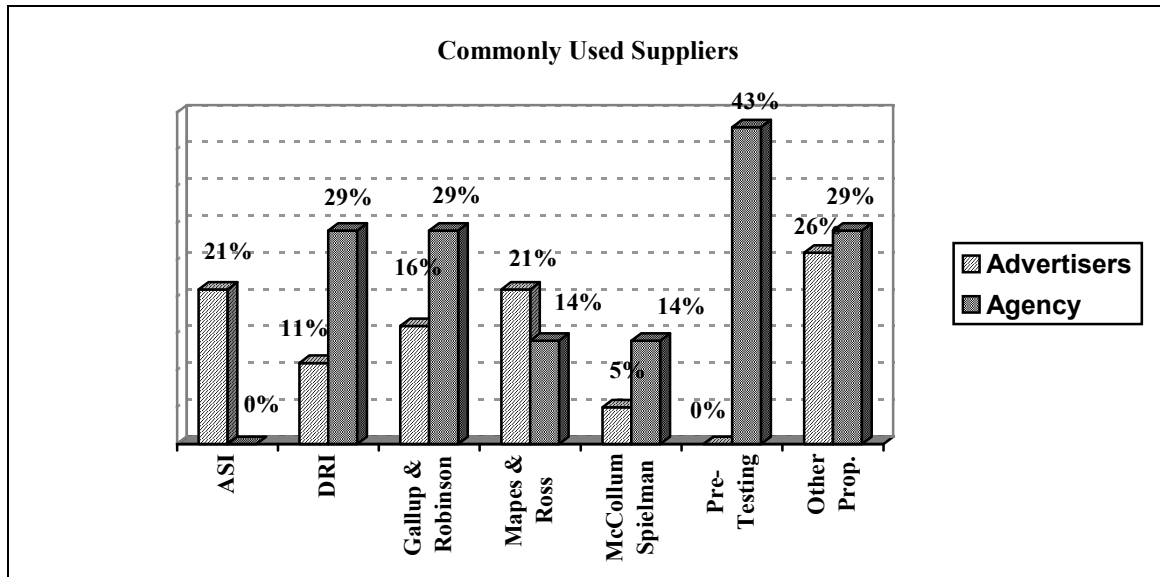
As was the case with TV, copy testing of magazine advertising is most likely to be done for new campaigns. All but one of the advertisers testing magazine copy said they involve their agency in some way.



The decision to test magazine copy is usually made by brand management. They are much less likely to be constrained (or guided) by policy, since only three (14%) of the companies we spoke with have a copy-testing policy for print.

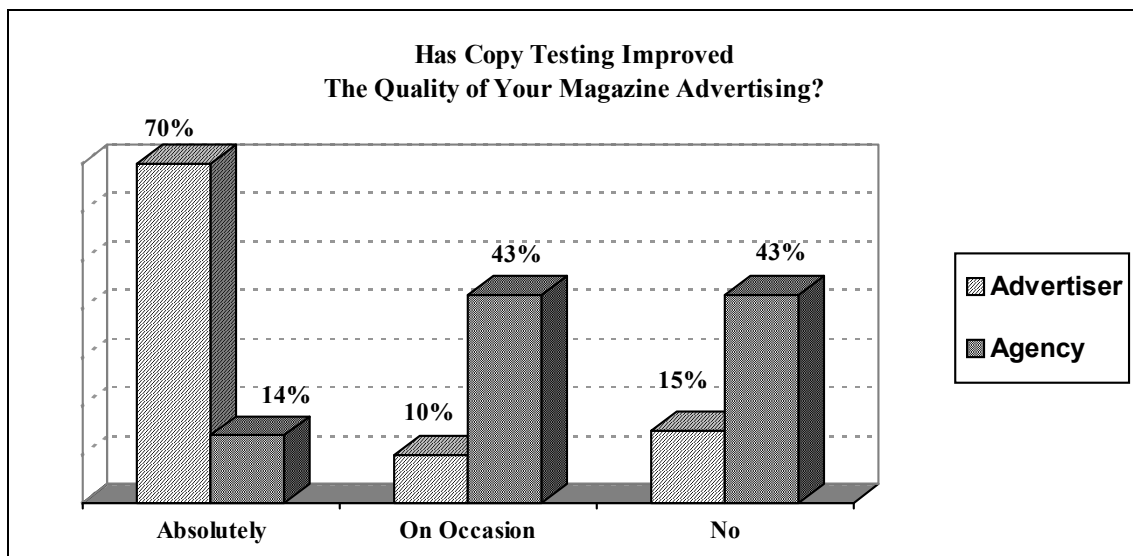


The list of suppliers used differs substantially from the TV list. Here longstanding relationships were the most frequent reason for selection of a supplier. As is the case with TV, a significant number of advertisers have developed proprietary systems.

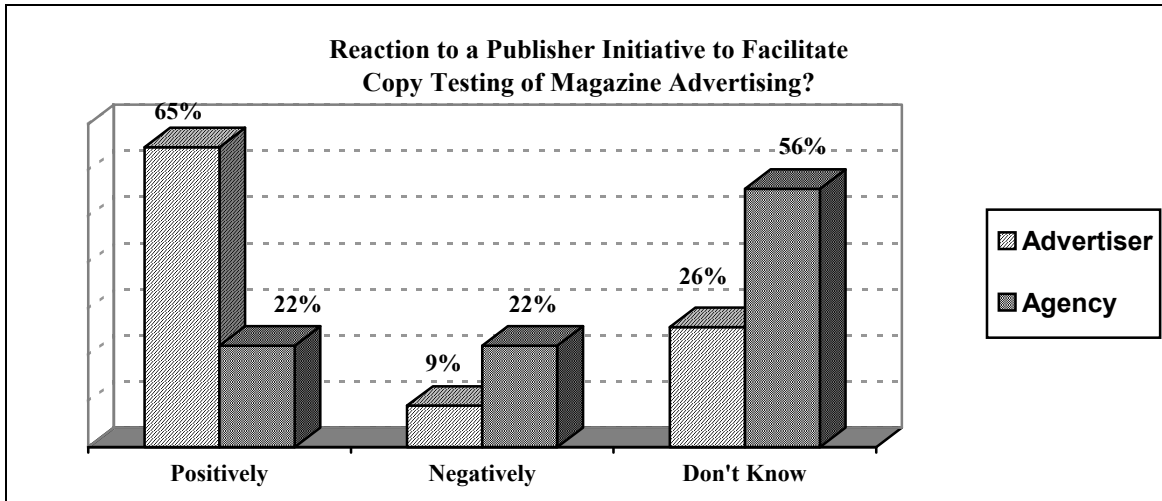


Only two advertisers were aware of work that had been done to validate the results of print copy testing, though 80% believe it has improved the effectiveness of their ads. Forty-two percent said they were doing more copy testing of print (vs. 71% for TV) and an equal number reported no change.

While advertisers seem more convinced of the value of TV testing, agencies view magazine copy testing somewhat more favorably than they do TV copy testing. One agency executive explained that "at least with print they can point to what they don't like."



When asked how they would respond to a publisher initiative to facilitate the pre-testing of print ads, the majority of advertisers responded favorably. Agencies were less enthusiastic. A few advertisers worried that it would be inappropriate for a publisher to play such a role. Another concern was that any initiative include their preferred methodologies. The majority of agency respondents were hesitant to express an opinion.



Firm	Name	Technique	Measures	Standard Sample	Materials	Norms	Time	Cost	Comparable TV Measure
Bruno and Ridgeway 609-895-9889	Day-after Recall Test	Magazines placed with qualified respondents in shopping malls to "take home and read that day." Next day telephone interview.	Ad recall, plus diagnostics.	200 qualified respondents.	Finished ads tipped into "live" issues.	Yes-some categories	4-5 weeks (10-days topline.)	\$8,000-\$10,000	No
Diagnostic Research International 323-254-4326	DRI	Portfolio test of 20 ads with editorial "filler". Multiple exposures to ad, each followed by questions. Mall intercept or telephone pre-recruiting, depending on incidence.	Recall, main idea comprehension, evaluation/ reactions, response and diagnostics.	100 product target group.	Rough or finished ads.	Yes-(1,200)	5 weeks	\$11,000	Yes
Gallup & Robinson 609-730-1550	Magazine Impact Research Service (MIRS)	In magazine test, next-day recall via telephone. Re-exposure for special questions. Geographically dispersed sample recruited door-to-door or via telephone.	Proved recall, idea communication, persuasion, ad liking and diagnostics.	150 women 18+.	Rough or finished ads.	Yes-Extensive	3 weeks	\$9,800 basic (more for custom)	Yes
Ipsos-ASI 203-840-3400	Next * Print	In-magazine test, next-day recall. Sample recruited by telephone. Also available: targeted sampling through NFO panel or purchased lists, depending on incidence. Telephone pre-recruiting. Magazines placed by mail.	Recall (with measured attention & brand linkage) purchase intent & frequency, diagnostics.	150 readers of similar magazines.	Rough or finished ads.	Yes-Extensive	4 weeks.	\$17,950	Yes
MSW Group (McCollum Spielman Worldwide 516-482-0310	Print*Chek	Multiple exposures to a proprietary magazine containing test and control ads with a different set of questions after each exposure. Mall intercept or telephone pre-recruiting, depending on incidence.	Measures include brand recall, communication, commitment/ persuasion, image/attitude/attribute, and diagnostics.	100 target respondents.	Rough or finished ad printed into test magazine by MSW.	Yes-Extensive	3 weeks	\$13,000-\$15,000	Yes
Mapes & Ross 609-924-8600	CoreSearch	Respondents are shown portfolio of ads and asked a series of diagnostics. Mall intercept or telephone pre-recruiting, depending on incidence.	Unaided recall, imagery, purchase intent and diagnostics.	100 women.	Rough or finished ads.	Yes-Limited	7-10 days	\$ 8,600	Yes
	Natural Exposure	In magazine test using next day recall conducted via telephone interview. Telephone recruitment-RDD or from list. Magazine placed by mail.	Recall, and persuasiveness. Imagery and additional diagnostics optional.	150 readers of similar publications.	Rough or finished ads.	Yes-Extensive	4 ½ weeks	\$10,400 (Synd)	Yes
Millward Brown 203-255-1222	LINK™	Respondent shown portfolio of ads chosen to create context similar to that in which ad will appear. Mall intercept or telephone pre-recruiting, depending on incidence.	Memorability, communication & persuasion. Detailed diagnostics.	100 of appropriate consumer group.	Rough or finished ads.	Yes-Limited	4-5 weeks	\$18,000+	Yes
Pre-Testing Company, Inc. 201-569-4800	Acid Test®	In magazine portfolio test. Mall intercept or telephone pre-recruiting, depending on incidence.	Recall, persuasion, "zapping" (eye-movement), and involvement.	100 of target audience.	Rough or finished ads.	Yes-Extensive	2-3 weeks	\$11,000-\$16,000 depending on data collected	Yes
Roper Starch Worldwide 212-599-0700	Starch™ Ad Readership Reports	T-T-B recognition. Door to door personal interview or personal interview of subscribers.	Noted, associated, read some/most. Demographics.	100 readers of specific issue.	"Live" ad	Yes	8-10 weeks	\$8900-\$12,000/ issue	No
	ADD+ IMPACT™	Respondents are shown ad. Mall intercept, on-line, or Opinion One kiosk.	Attention & bonding Diagnostics.	75 of target group.	Finished or rough ad	Yes	2 weeks	\$17,000+	Yes

