

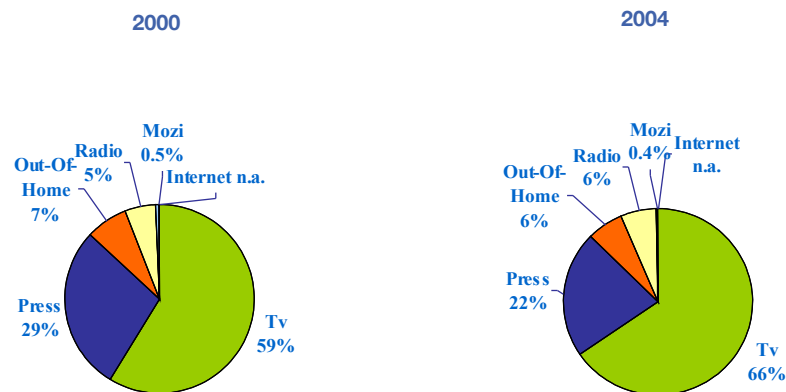
THE POWER OF THE WRITTEN WORD

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The development of the Hungarian media and advertising market is only a few decades old. Hungarian commercial television and radio started their work in 1998 and they have radically changed the media landscape in Hungary.

Although the two Hungarian commercial television organizations soon developed a vast audience, due to the lack of experience and relatively low licensing fees, the advertising fees were extremely low. By the start of the third millennium these phenomena resulted in a dramatic increase of television advertising revenues while the print advertising revenues decreased year by year.

Media spending in Hungary



Source: TNS Media intelligence

This trend was further strengthened by the GRP based quantitative media planning system: TV ratings based on electronic viewership measurement systems became the currency of media and advertising business.

At the same time, Hungarian TV audience is subject to more commercials during prime-time programming than television audience in other counties, e.g., Britain, and consequently, the number of Hungarians who are sceptical towards commercials or who refuse commercials has increased.

Based on this, the Hungarian Publisher's Association (HPA) decided to announce a project, the main goal of which would be to show the importance and advantage of print advertising over the other types of media advertising, particularly taking other qualitative measures into consideration, as this is the only way to understand the function, the influence and the effectiveness of each media.

Ipsos-Szonda won the HPA tender in July 2004. Ipsos-Szonda has relevant experience in media research, as the company has been conducting the national readership survey in Hungary together with GfK Hungary for more than a decade.

The initial research hypothesis was that attitude towards the media has an effect on advertisements and commercials; the greater the media involvement, the more effective the advertisements and, thus, the success of the campaign. Although such Return on

Investment research had already been carried out in many other countries, it was still essential to confirm this phenomenon in Hungary.¹ This new complex survey was very different from the generally established surveys previously conducted and many new methodical innovations were used. The complexity of the research was indicated by the fact that both qualitative and quantitative methods were used for analysis. The qualitative focus groups were selected so that the participants were similarly situated individuals for whom the use of a certain product or service was relevant, which made the group more interesting as the participants were likely to have paid more attention to the commercials.

The development of the qualitative part took a long time as it was very special in nature. The researchers used the sample of the National Media Analysis and conducted interviews with individuals whom they knew were readers of certain papers and viewers of certain TV channels. This way we got 4 sub-samples and 58 campaigns:

- daily newspaper readers + TV viewers
- women's weekly magazine readers + TV viewers
- women's monthly magazine readers + TV viewers
- men's/sports/business magazine readers + TV viewers

So finally our total sample (2000 persons) consisted of two different samples, according to the task of the survey.

1. Representative 15-59 years old (gender, age, education, type of settlements, counties) sample for the attitude (media, ads) part of the survey.

2. Different reader groups for the measurement of the recall of the ads and attitude towards the brands. We had four different readers groups. Each group contained 300 respondents, who read the given magazines/newspapers and watched the two national commercial TV stations (we knew this from the National Media Analyzes). We collected 12-15 print and/or TV ads for each group which had run in the given print and TV stations. To set up these ads we used systematically the TNS Media Intelligence data base. (In Hungary from 1998 TNS Media Intelligence has monitored all the TV, print, outdoor and radio ads).

The four different groups were as follows:

- daily newspaper readers + viewers of 2 TV stations
- women's weeklies readers + viewers of 2 TV stations
- women's glossy readers + 2 viewers of TV stations
- "macho" magazine (sport and economical)

The selection of the campaigns was also very cautious. Basically we analysed three types:

- campaigns that appeared on TV but not in print
- campaigns that appeared both on TV and in print
- campaigns that appeared in print but not on TV

¹ AC Nielsen: Highlights of Sales Scan – a Magazine Advertising Study from ACNielsen, 1998.
 Media Marketing Assessment (MMA) Study for MPA, 2001.
 Starcom Mediavest Group: Evaluating Tv And Print Effects, 2001.
 The Multiplier Effect: Tv+Print improves communication. Rolf Speetzen, ESOMAR Print Brand Conference, 2001.
 Millward Brown: Ad Awareness Study for Magazine Publishers of America.
 Synergy Study – Print Media association, South Africa.
 Gfk Germany Hassloch studies.
 Media Efficiency Maps. Researched by the Media Edge. Europe for Young and Rubicam.
 Strength in numbers: The challenges for newspaper advertising. World Association of Newspaper conference, Paris, 1999.
 Alan Smith: Take a fresh look at print, 2002.
 Ad Track. Millward Brown Study for IPC Magazines.

The considerations for the campaign selection (based on the TNS Media Intelligence data) were:

- same camp. age
- same campaign budget
- other media types but same usage
- other sectors:
 - finance
 - telecommunications
 - automotive
 - FMCG
 - campaigns between the 1st September - 10th October 2004.

The results of the research seem to prove our theory. The focus group participants stated negative attitudes only towards television commercials but not towards print advertisements. In the case of print media, participants were of the opinion that advertisements are a natural part of the papers, while as far as TV is concerned, commercials are the necessary evil they have to tolerate.

Disturbance of different media

	disturb	Not disturb
Tv	57%	6%
Internet*	17%	47%
Flyers	13%	47%
Radio	11%	33%
Press	5%	52%
Outdoor	4%	65%
Ads in the shops	3%	66%

*Based on the Internet users

Source: National Media Analysis
Ipsos-Szonda & GfK

ESOMAR AB – 5%
Degree – 4%
Main shoppes – 6%

The relationship with print can also be more intimate than with TV, as magazines can be a tool for self expression, it is written for “people like me.”

The results of the qualitative research are also reflected in the quantitative research data. The Recall Index of advertisements that ran on TV as well as in the papers was 19% higher than the Recall Index of those that appeared only on TV.

During the analysis of the campaigns that ran both on TV and in print we also investigated the function of the synergy. We wanted to know the role of print in the recognition and in the attribution of campaigns and, more specifically, whether or not print gave something additional to TV spots. We were able to do this complex research thoroughly because the method of the data collection was based on CAPI. Our survey “*Power of the Written Word*” is the biggest survey ever carried out in Hungary.

We covered the brand names and logos in TV spots and in printed advertisements. The results were amazingly promising, they absolutely confirmed our expectations. Print strengthened TV spots recognition by 7% and attribution by 14%, which are absolutely remarkable results, especially as far as advertisers are concerned. The favourable index of attribution can be found in other parts of the research as well.

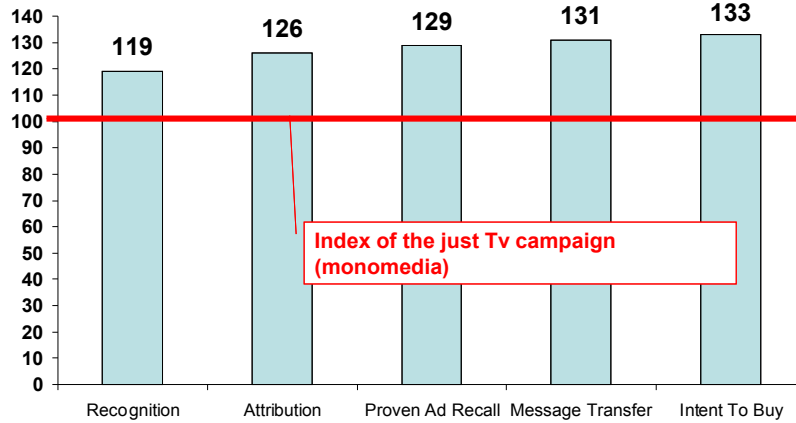
By using spontaneous questions when measuring the potential of the message transfer (of the advertisements), our results showed that advertisements which appeared both on TV and in print received an index 31% higher than those that were only on TV.

Consequently, it was established that the brand as advertised, and the print media have a close symbiotic relationship. Not only does print media support brands, but there is an active feedback as well. This specific synergy culminated in the Purchase Intent Index. The purchase willingness increased by 33% for those advertisements that appeared in print as well as TV.

Efficiency of the different campaigns

(TV+print) VS. (TV)

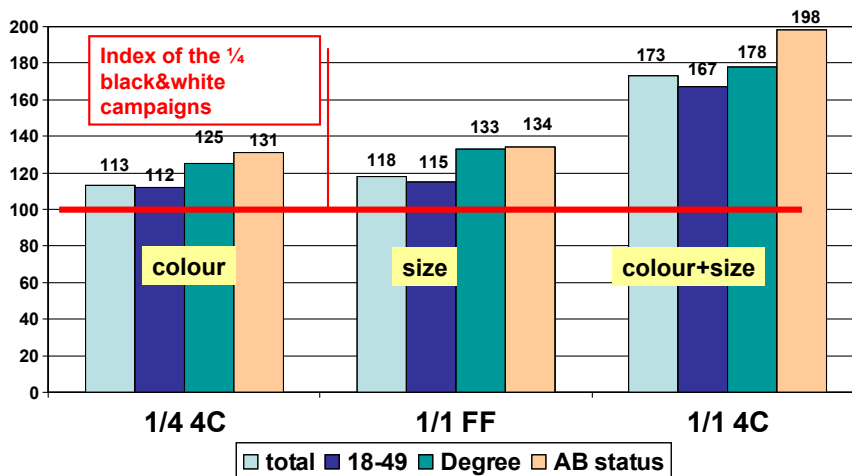
Same budget



Source: The Power Of The Written Word, Ipsos-Szonda, 2004

So our theory has been proved to be right and our national research experience is in line with international research experiences. But we took some further steps: if print can help optimise the Efficiency Index of a campaign, then how can we optimise the efficiency of printed advertisements, and how and to what extent do the creative features of an advertisement influence its effectiveness and importance. In order to answer these questions, we analysed different types of advertisements with different colour and size combinations. We came to the conclusion that colour and size both improve the effectiveness (Recall) approximately to the same extent. If we combine colour and size, we can see an immense improvement: a 1/1 colour advertisement can be 100% more effective than a 1/4 black and white one.

Recall of the print ads according to the size and colour



N=2000