

AN EXPERIMENT IN MEASURING BRAND ENHANCEMENT

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Those charged with promoting advertising sales into international print media have long argued – that would be for at least thirty years – that the environment and brand equity of their titles offer marketers of global products and services advantages not afforded to them by national media. In this time, the ‘proof of the pudding’ has rarely been in the eating but rather along the lines that if something is repeated frequently enough, people will believe it. So while not a law of international print media sales, it has passed into international print sales’ lore that international media donate a qualitative advertising effectiveness edge over, above and beyond that presented by national media. In 2006 a group representing the collective interests of international print¹ media decided to call their *own* bluff and research the aged efficacy of their claims. Given the foregoing, perhaps the most interesting part was that they really did not know exactly what they were going to get: the design of the research was, in fair measure, experimental – not least because, in essence, they were conducting an experiment. (The design of the study was the responsibility of the author of this paper and *iCD Research*). And it was not an experiment whose results could be buried should they fail to support the research’s hoped for outcomes, for the agency community had been consulted, fore-warned (and fore-sold) on the study.

The Hypotheses

The survey set out to investigate four hypotheses:

1. That attitudes towards international and national titles were different
2. That advertising was enhanced to different degrees within international and national titles
3. That perceptions of advertising within international and national publications varied
4. That specific brand associations differ across international and national titles

The first hypothesis - that attitudes towards international and national titles were different - was hardly new and indeed questions around this topic had appeared on many international research surveys in the last five years. However, in these surveys, e.g. ABRS, EBRS (Ipsos Mori), in terms of a ‘qualitative’ understanding of attitudes to, and judgements on, national and international media, this was the end of the line: yes, differences existed in perception between the print media types in relation to whether they were seen to be, for example, “unbiased”, “trustworthy”, “influential”, “respected” et al, but the studies did not go further and investigate whether there was *any benefits to advertisers* as a consequence of observed differentials. It passed seamlessly into sales lore that there were and, furthermore, these benefits were ubiquitous across all advertising categories. The ‘Driving Brand Enhancement’ study commissioned by the World Press Group and conducted by *iCD Research* was burdened by no such assumption; indeed the assumptions of the past were to be the matter smeared under the media research microscope.

Approach

There were three stages to the research:

Alignment: this involved a series of face-to-face interviews with stakeholders within the World Press Group itself and likely recipients of the eventual findings (agency and client advertising personnel) to gain ‘buy-in’ and ensure that all key objectives were covered.

Qualitative: Six online focus groups were expedited (two in each of France, Germany and the UK) with readers of national and international titles. The main purpose of this stage of the research was not to generate usable findings, but to identify key themes within the relationship between medium and advertising and to test respondents’ understanding of language (such as ‘enhancement’, for example). The qualitative stage of this study was primarily – but crucially – used to inform and construct elements with the quantitative arm.

Quantitative: 2,114 interviews were conducted over a four week period (October 2006) with residents of six countries: France, Germany, Italy, Spain, Switzerland and the United Kingdom. The sample – names and e-mail addresses – were provided by each of the World Press Group member publications and were supplemented by respondents from *iCD Research*’s global panel.

¹ World Press Group: The Economist, Financial Times, Fortune, International Herald Tribune, National Geographic, Newsweek, TIME, Wall Street Journal Europe

All respondents, both international and non-international readers were required to be:

- Employed Full-Time
- Earning US \$57,000 or more
- Regular readers [4 out of 4 issues] of a title (see below)

Both groups, however, are not mutually exclusive as very few would readers would only read international titles uniquely.

- International readers were required to have read 4 out of 4 issues of one or more of any of the eight World Press Group titles. They were allowed to be readers of non-international titles i.e. national publications.
- Non-International readers were to have read 4 out of 4 issues of local “quality” publications as set out by survey design (See Table 1). However to be designated non-international readers they had not to be readers of more than 3 out of 4 issues of any of the eight World Press Group titles.

Table 1

INTERNATIONAL	UK	FRANCE	GERMANY	SPAIN	ITALY	SWITZERLAND
The Economist	The Independent	La Tribune	Die Welt	ABC	Corriere Della Sera	Basler Zeitung
Financial Times	The Guardian	Le Figaro	Frankfurter Allgemeine Zeitung	Actualidad Economica	Il Giornale	Corriere Della Sera
Fortune	The TIMES	Le Monde	Handelsblatt	El Mundo	Il Sole 24 Ore	Neue Zurcher Zeitung
International Herald Tribune	The Daily Telegraph	Le Point	FT Deutschland	El Pais	La Repubblica	Tages-Anzeiger
National Geographic	The Independent on Sunday	L'Express	Der Spiegel	El Periodico	L'Espresso	Tribune de Geneve
Newsweek	The Observer	Le Nouvel Observateur	Die Zeit	Expansion	Il Mondo	Cash
TIME	The Sunday Times	Capital - French édition	Focus	Il Sole 24 Ore	Panorama	Der Spiegel
Wall Street Journal Europe	The Sunday Telegraph	Enjeux Les Echos	Capital - German Edition	Tiempo	Capital - Italian edition	Das Beste Aus Reader's Digest

Weighting of data was undertaken such that each country represented an equal percentage of the universe. Further, each WPG title was assumed to be equal and results are presented at an aggregated level. In respect of both of the fore-going the weighting system can rightly be seen to be artificial: each of the six countries does not have the same population, nor does each title have the same readership. However, it was stated from the outset that the research was intended to be more of a genuine experiment rather than a quest for verisimilitude. Further, the weighting by country to ensure a sixth universe allocation to each, did little to affect the results which will be viewed later; this is because there was little, or certainly no significant country by country, variation. With regard to readership there was little option to an artificial construct: given readership was defined as 4 out of 4 issues, for internationals there was no reliable data available that could express each title's absolute (hence allowing later for relative) readership. And, importantly again, when data were analysed there was not an expansive range of results from the extremities of scores achieved by individual international titles.

Isolating an independent variable: The single most important measure to be implemented with respect of weightings was that which was undertaken to ensure that the sample of international readers and non-international readers were **matched in terms of demographic and economic characteristics**. This is where the claim to be an experiment is truly justified. It is well known from every international survey of note or reputation that readers of international titles enjoy a higher profile (as given by occupational status, income, education, international travel) than the survey universe average (irrespective of survey) and readers of 'quality' national titles. Given that the research wanted to look at the differences between readers and non-readers of international titles in respect of their relationship or perception of publications – both national and international – and the advertising contained, or regarded as best placed within, titles, then the elimination of characteristics which, themselves, could be seen to be explanatory factors in any differences arising in scores was essential. For example, if readers of international titles generally indicated that international publications were more appropriate vehicles for luxury watch advertising, it was important that this did not stem, and therefore could be explained by, higher levels of occupational status or income. In others words, by matching the two types of reader samples on a range of key (if not exhaustive) variables it left as independent *only* the relationship between readers and publications and brand perceptions (irrespective of readership) of the two title categories.

Data collected from each respondent, and subsequently used to weight the respective samples, were:

- Age
- Gender
- Country of residence
- Work status
- Job title
- Main business activity
- Personal income
- Household income
- Marital Status
- Children living in household
- Citizenship

Readership itself was precisely – if again somewhat arbitrarily – defined.

- International readers were required to have read 4 out of 4 issues of one or more of any of the eight World Press Group titles. Such a high frequency of readership – to be matched as a criterion in the non-international sample – obviated any sense of bias owing to the provenance of the sample-list. It should be noted that international readers were allowed to be readers of non-international titles if they met the frequency criterion.
- Non-International readers were to have read 4 out of 4 issues of local publications as set out by the methodology. They were, however, not to have read any more than 3 out of 4 issues of any of the World Press Group titles.

RESEARCH FINDINGS

Testing the hypotheses, and explaining differences between the matched samples.

Hypothesis 1) That attitudes towards international and national titles were different

With robust and demographically matched samples, the quantitative research allowed analysis to measure perceptions and opinions overall, and within sub-segments.

- To understand whether differences existed across reader types, a series of media and brand driver attribute questions were asked of both sample sets.
- While international and non-international readers demonstrated an affinity towards their regular title, differences emerged within:
 - Perceptions of less bias within international titles
 - Higher recommendation to others

Table 2 Attitudes towards publication genre

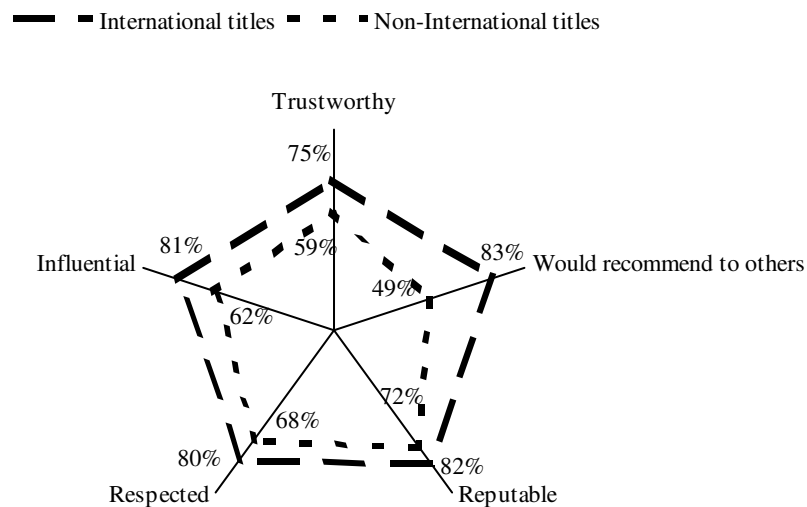
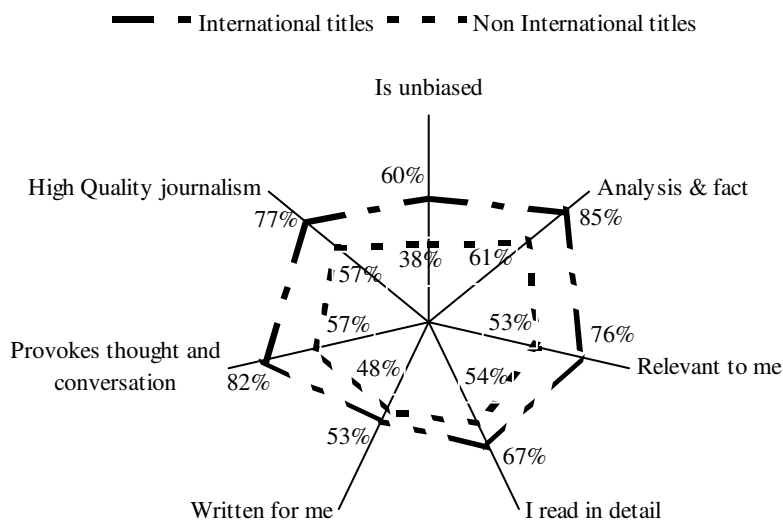


Table 3 Recognition of editorial quality by publication genre



Whilst these kinds of data are neither new nor revelatory (see recent EBRs/ABRS, Ipsos Mori), it is the first time that these difference have been demonstrated by matched samples research.

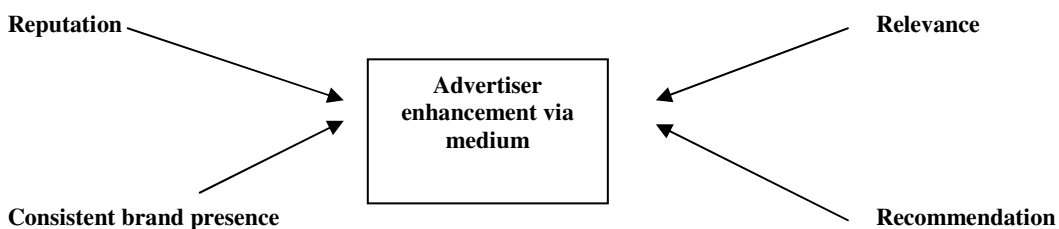
Hypothesis 2) That advertising was enhanced to different degrees within international and national titles

The first important point to note is that from the qualitative stage of the research it was possible to get an understanding of key language elements i.e. ‘engagement’ and the drivers of such concepts. Below I list a few quotations given in response to the question, ‘What does enhancement mean to you?’

- “I interpret ‘enhanced’ in your question as a broadening of appeal (i.e. were people respect and/or trust the brand)
- “...more prestige – increasing the reputation rather than the material product”
- “Giving the company exposure to various markets and increasing its presence globally”

At the quantitative stage and via factor and regression analyses it was possible to identify key drivers of the relationship between a medium and the value of enhancement. These are shown in Table 4 below.

Table 4 Relationship between enhancement and medium



To gain a better understanding of the “drivers” of possible brand enhancement respondents were presented with a list of statements and then were asked to rank, on a scale of 1 to 9, their level of agreement with each statement (very strong agreement equated to 9). Where respondents had a readership (4 out of 4 issues) of more than one medium – whether it was within the international or national category – one was selected on a random rotation basis. Tables 5 to 8 below give the results related to four statements. In each case there is a statistically significant variance.

Table 5 Reputation and advertising

The reputation of advertisers within this title often complements the reputation of the title

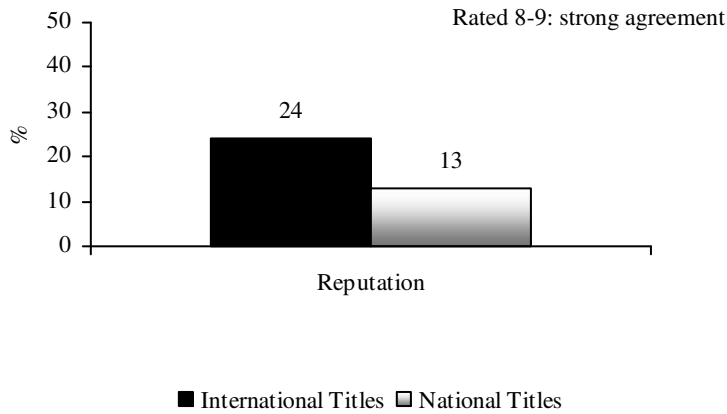


Table 6 Relevance, their drivers and advertising

Global brands often advertise within this title

Corporate image or corporate branding messages are often advertised in this title

Prestige companies/brands advertise within this title

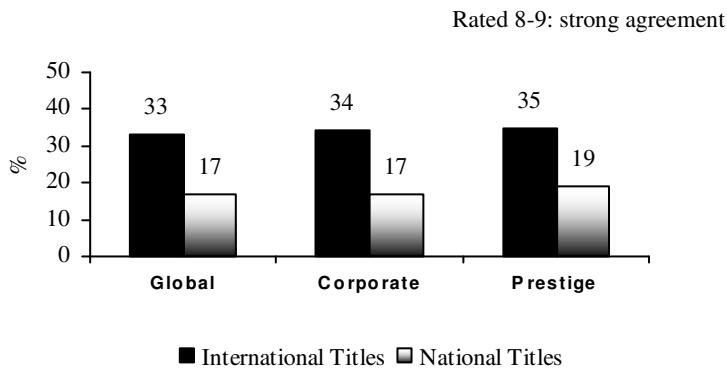


Table 7 Consistent presence and advertising

I often see the same companies/brands advertised within this publication

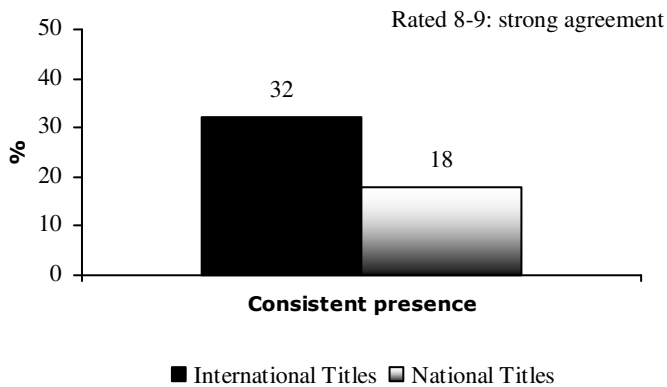
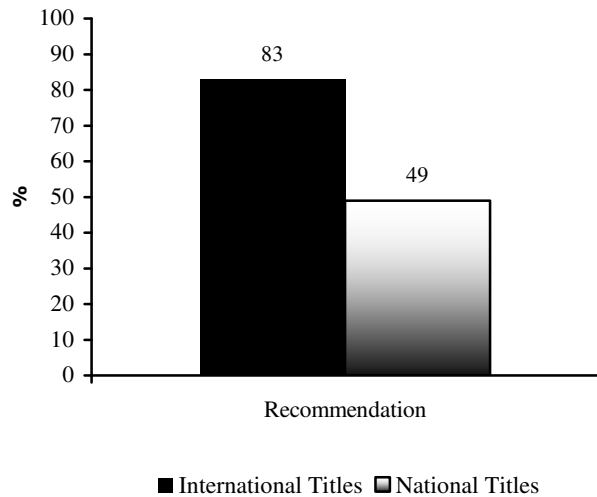


Table 8 Recommendation and advertising

I would recommend this title to others

Rated 8-9: strong agreement

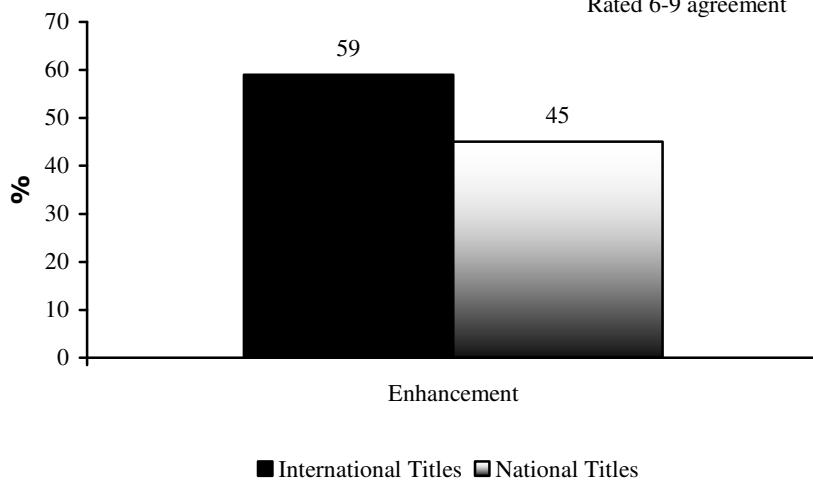


On each and every driver of advertising enhancement, it can be seen that international titles scored significantly higher in the ‘top box’ ranges than national media. And this was encapsulated by looking at the aggregate scores for international media compared with national media for those giving a positive answer (that is, checking boxes 6-9 on the 9 point agreement scale) for the question, “advertisements are enhanced by the content contained in this title”. (See Table 9 below).

Table 9 Enhancement of advertising by publication content

Advertisements are enhanced by the content contained in this title

Rated 6-9 agreement



However, whilst it might be true that on a generalised basis that international media outscored national media, the goal of the research was somewhat wider. And that was to investigate how enhancement worked – or indeed didn’t – at the advertising category and brand level.

Hypothesis 3) That perceptions of advertising within international and national publications varied

The matched samples were asked their opinions of where specific sector advertising would be enhanced on a selection of international and national titles. Respondents were presented with a list of four national and four international titles. from which they were asked to choose as many, or as few, titles that they felt would “enhance” the advertising category. For national readers (that is, read 4 out of 4 of a specified national title) the list of national titles always contained the title they read; the other titles within the list of four national titles – assuming there weren’t 4 out of 4 readers of all four titles – was generated randomly. The same strictures were used to generate the list of four international titles. For some, that is those that read (4 out of 4 issues) of both a national and international title then both lists would always have the titles included that they were a reader of.

The definition of enhancement (based in the main on the qualitative research findings) is giving below.

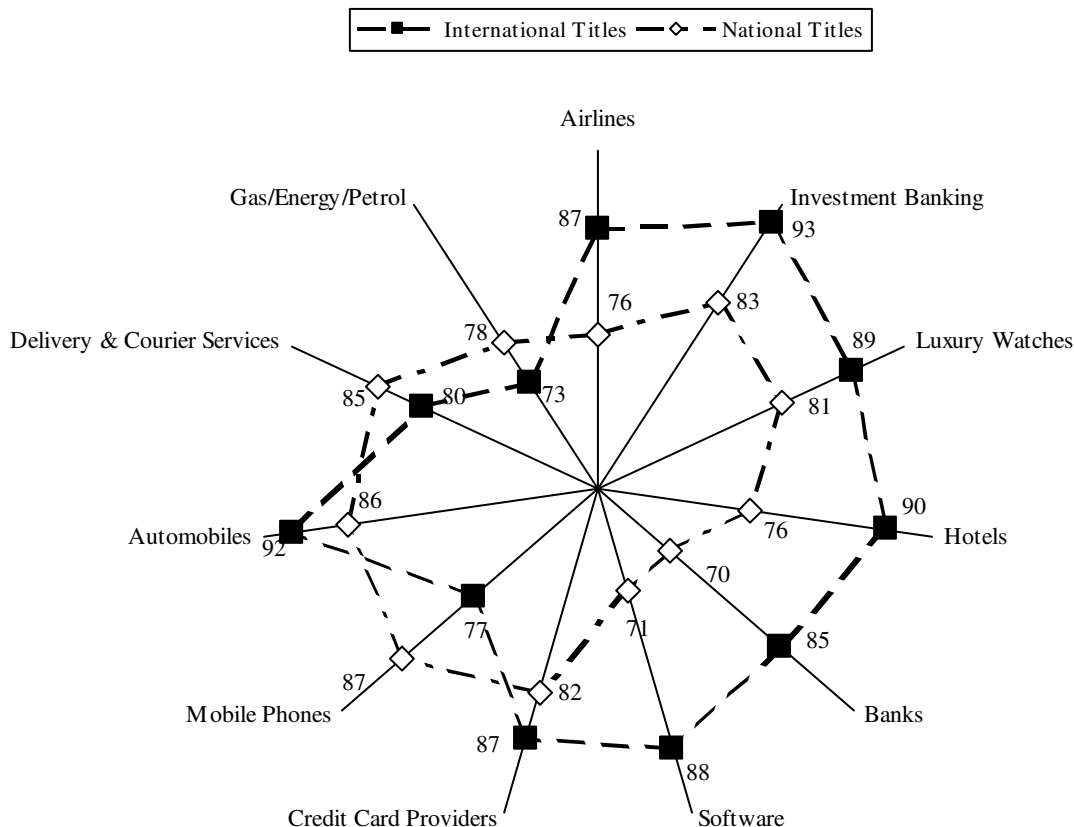
“By enhance the product or service we mean, advertising would improve the image or you believe there is a clear association between the category and the title”

In total eleven sectors were listed with examples of companies within each sector provided.

- Automobiles (e.g. Toyota, BMW, Honda)
- Investment Banking (e.g. Merrill Lynch)
- Gas/Petrol/Energy (e.g. Chevron, Shell)
- Delivery & Courier Services (e.g. FedEx, UPS)
- Credit Card Providers (e.g. VISA, American Express)
- Mobile Phones (e.g. Nokia, Samsung)
- Luxury Watches (e.g. Rolex, Tag Heuer)
- Hotels (e.g. Four Seasons Hotels, Mandarin Oriental Hotels)
- Airlines (e.g. Singapore Airlines, Lufthansa)
- Banks (e.g. HSBC, ABN AMRO, Citibank)
- Software (Microsoft, Oracle, SAP)

In relation to brand enhancement, in all categories there is a marked distinction (the vast majority statistically significant) between those choosing from the list of nationals and international titles (despite, of course, as the data shows, the greater part selected at least one from both lists). However as Table 10 clearly shows, the difference - or the advantage – is **not** entirely ubiquitously to either internationals or nationals.

Table 10 Enhancement by publication genre and advertising sector.



Clearly there was the hope, and maybe indeed the expectation, by those that commissioned the survey (The World Press Group) that there would be a category (and categorical) ‘clean-sweep’ for international titles. It is not within the intended scope or remit of this paper – whose focus is on reporting of a research experiment and of the results of it - to wander too far into the realms of conjecture as to why certain results were what they were, but a few steps off the straight and narrow path may be excused. The category ‘Mobile phones’ is the one where nationals enjoy their greatest advantage; the examples given are international household names – Nokia and Samsung – and both advertise in the national and international press. In the national press (and TV and radio) the focus is essentially retail: the telecommunications equivalent of ‘bottoms on seats’. And if we reconsider the definition given to respondents of “enhancement” [*‘By enhance the product or service we mean, advertising would improve the image or you believe there is a clear association between the category and the title’*] it may not be surprising of a higher predilection to the selection of national titles. Retail ads abound in the national press; they are a scarcer commodity in international print. Therefore where would it be expected that a “clear association between category and title” lies? However – and maybe mistakenly – enhance is explained in another, and perhaps not empathetic way: “advertising would improve the image.... (in a) title”. With hindsight maybe it would have been better - and that is better from the point of view of clarity of research and not for The World Press Group (though that could have been a consequence) – if these two propositions had been separated and asked of discretely and were not lumped together in the same question. For in the area of defining enhancement they may not have been pulling in the same direction: “improve the image” strikes me as predictive, and “clear association” seems more observational.

When the research drilled down into the brand level there was probably a greater degree of certainty as to how to interpret the data.

Hypothesis 4) That specific brand associations differ across international and national titles

A number of brands were presented to all respondents in order for them to evaluate the medium that they believe would be appropriate to advertise within. Some brands were common to all questionnaires (Table 11); and some only to specific national variants (Table 12)

Table 11. Brands covered on all questionnaires

Toyota	Shell	Tag Heuer
BMW	BP	Four Seasons
Honda	Samsung	Mandarin Oriental Hotels
HSBC	Motorola	British Airways
Credit Suisse	Nokia	Singapore Airlines
ABN AMRO	LG	Microsoft
Merrill Lynch	Toshiba	Kodak
UBS	Rolex	Canon

Table 12. Country specific brands covered

UK ONLY	FRANCE ONLY	GERMANY ONLY	ITALY ONLY	SPAIN ONLY	SWITZERLAND ONLY
O2	Air France	Mercedes-Benz	Nastro Azzurro	Telefonica	Nestle
Selridges & Co	Moet et Chandon	ADIDAS	Alitalia	Iberia	SwissAir
BT	Renault	BMW	Italia Telecom	Cacique	Swatch

Respondents were again presented with two lists of publications (international and national) but for this section of the research each list was comprised of all eight titles germane to the publication category. Respondents were then asked:

*“For each company, we would like to understand which **one** title you feel would be the most appropriate for the company to advertise within.”*

Table 13 gives results for those selecting an international publication with figures broken down by international readers (many of whom also read 4 out of 4 issues of a listed national title) and non-readers (who didn’t read 4 out of 4 issues of an international title). If it is thought that there is a likely bias within the framework to selecting a title that a respondent read 4 out of 4 issues of, then the balance would very much be in favour of selecting a national title – because whilst those deemed international readers could also read national titles the converse, the way the headings are constructed, could not be the case for non-international readers.

In reading the results it is a simple exercise to calculate the percentage selecting a national title for the categories of international or non-international readers: it is simply the reciprocal of them number shown of those selecting an international title. For example, for Singapore Airlines where 91% of international readers chose an international medium, it means 9% selected a national one; equally for Singapore airline where 54% of non-international readers chose an international title, it means that 46% chose a national one.

There were twenty-four brands asked of on all questionnaires. Of these twenty-four brands twenty of them registered a score of 50% or greater for an international medium by international readers, with only four brands failing to secure a majority for an international title. Conversely, eleven brands were selected by non-international readers to be better (or in Microsoft's case equally) suited to an international medium than a national one. (See brands with shaded grey figures). It is worth noting that if residents of the country of origin of a given brand were excluded from the analysis – say take UK residence out of BA data set – then the percentage figures from international would increase and those for non-international decline.

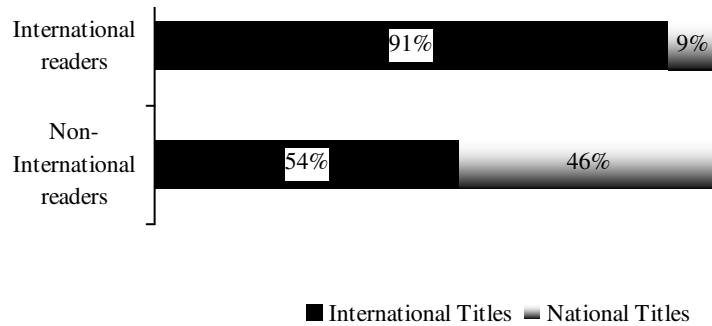
Table 13: Those selecting an international medium broken down by international and non-international readers

	International Readers	Non-International Readers
ABN AMRO	57%	49%
British Airways	63%	54%
BMW	52%	25%
BP	68%	56%
Canon	62%	36%
Credit Suisse	64%	69%
Four Seasons	92%	77%
Honda	41%	9%
HSBC	68%	29%
Kodak	70%	59%
LG	52%	30%
Mandarin Oriental	82%	72%
Merrill Lynch	85%	57%
Microsoft	75%	50%
Motorola	42%	29%
Nokia	61%	20%
Rolex	83%	45%
Samsung	35%	44%
Shell	81%	51%
Singapore Airlines	91%	54%
Tag Heuer	77%	56%
Toshiba	52%	20%
Toyota	42%	31%
UBS	75%	47%

While the data above seems, perhaps, just to be delving to one level deeper than the category advertising analysis (and at a certain level it is), there is a fundamental difference in how the scores are constructed. For advertising categories, respondents could choose either of international titles and national ones. At the brand level the respondent could only chose one medium. The latter forces a choice that is different from that facing the brand advertiser - where it is not a question of either/or and indeed both media sets are frequently employed. However, as was stated very early in this paper the research was, from its outset, qualified and cautioned by the notion of an experiment. And experiments do not have to replicate reality if they are trying to test a variable within it. The brand level data does add a useful dimension to the study because it a) is specific to a genuine company that has values and associations all of its own b) it presents a view of the perceived *relative* importance to brands of international and national media. And the relative importance can be viewed through the (literal) lens of international and non-international readers. (See Table 14).

Table 14 Singapore Airlines and Brand Enhancement

For each company, we would like to understand which one title you feel would be the most appropriate (Singapore Airlines) to advertise within

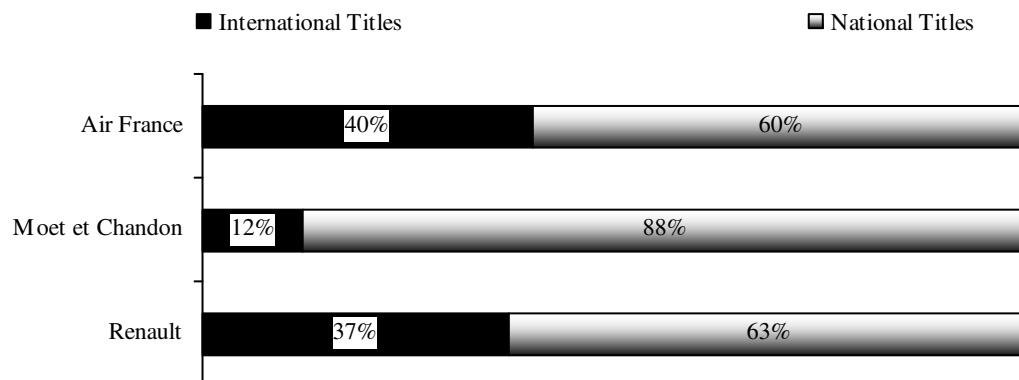


As well as investigating the perceived ‘best’ medium to advertise twenty-four common-to-all-questionnaire brands, the study looked, too, at national brands within national markets. However, as with the case of the company’s shown below or indeed BMW in Germany, these were themselves brands with an international presence and standing. But within their country confines it was strongly felt – albeit within different degrees of intensity – that national media were better suited to their promotion than international.

Table 15 French only respondents on French Brands

“Now, in the middle of the screen, you will see a number of companies that regularly or sometimes advertise within national and international press. For each company, we would like to understand which one title you feel would be the most appropriate for the company to advertise within.”

FRANCE only Respondents



Conclusion

The primary conclusion was that all four hypotheses (repeated below) were proven, and in each case to a statistically significant degree.

The hypotheses again:

That attitudes towards international and national titles were different

That advertising was enhanced to different degrees within international and national titles

That perceptions of advertising within international and national publications varied

That specific brand associations differ across international and national titles

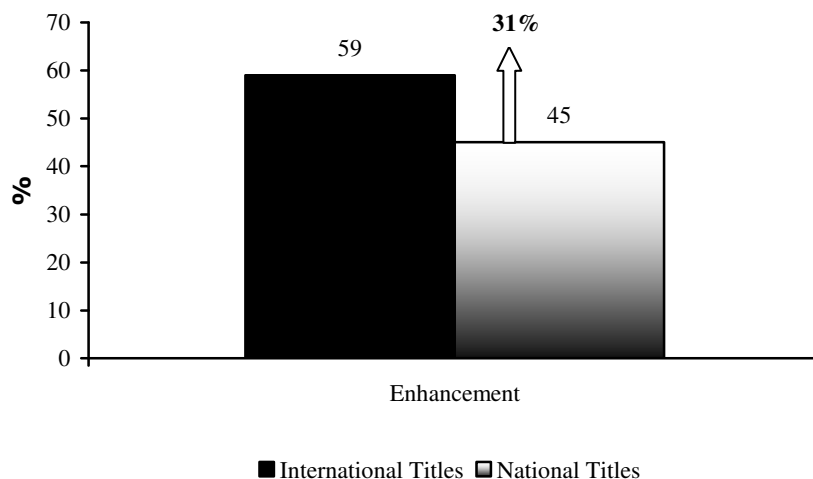
However, within the four headings of attitudes, enhancement, perception of advertising and brand association there were marked differences within the phenomena being tested, e.g. not all categories of advertising were seen to be uniformly 'enhanced' by one medium over the other; ditto for brand associations.

The use of matched samples ensured that the observed differences (those that proved the hypotheses) could not be explained by demographic/socio-economic variances within the two samples and that, therefore, there is something intrinsically different about the relationship between the two media sets (and how they are perceived by both readers and non-readers) and the advertising contained within them. Quite simply, as media types, they can be seen to 'enhance' advertising to varying degree.

However, in reality the readers of international print titles and 'quality' national ones are not matched demographically or socio-economically. Furthermore, when the results of the matched sample data were segmented by income levels the higher the income levels (though still matched), the better international media performed against national titles. A consequence of the two foregoing points is that while the hypotheses were proven as far as possible by isolating independent variables, in the real world where these publications are read by real people who actually really are different in an aggregated form from each other, the observed differences are probably severely minimised.

So taking the data that was first shown in Table 9, and which now becomes the content of Table 16, we can surmise that the uplift of 31% (that is the percentage that 59 is greater than 45) accorded to the international print media, is almost certainly an understatement of the differences accruing to the 'real' readership of the two media types.

Table 16: Enhancement restated



Therefore, what is at once a strength of the survey – its ability to test hypotheses on independent variables – is also a weakness: the results accruing to the two media types are indicative of difference, and are not measures of 'real' audiences.

Theoretically this is something that can easily be remedied. And that is instead of measuring difference between media type – national and international print – measurements should be of individual titles based on their true readership compositions. That though – for international titles at least – is much easier said than done. There is no total (15+) survey of these titles across Europe (let alone elsewhere) that measures them all and certainly not with any degree of accuracy given that their small penetrations generate very small (and very unreliable) samples. An added piquancy is that the World Press Group decided that this study would only be funded if no individual title data were to be made available. This is because of the lamentable record

international print media have of using data funded and collected for the common good (that is international media good) and for the greater glory of their media sector. However, history shows that if data were allowed to be published at the individual title level, then the various titles would try first (and perhaps, sadly, exclusively) to use the data against other individual titles should their data allow for it. Rarely in the history of international print media has the common good ever got near to surpassing individual need. Research directors might run research departments, but they don't run sales ones (and rightly so).

In assessing the merits of the survey it is only fair to point out two of its weaknesses. The first is that agencies really would like data by title not just media type (though media type data – national and international - has been much welcomed and appreciated). Secondly, the survey would have been of greater detailed use if it had collected data on more brands (though this is an exercise easily remedied in any future study). That it didn't investigate more brands in the first place was because of the testing of the first three (non-brand related) hypotheses. Any future survey would not have to re-tread this ground.

Therefore, an ideal “second-in-the-series” of the Driving Brand Enhancement survey could:

- Give results for individual titles based on robust samples for each and all
- Remove matched samples with a view to obtaining ‘real’ measures of enhancement, attitudes, associations and perceptions
- Have readership composition for 4 out of 4 readers for titles constructed on commonly accepted ‘best estimates’ for such key dependent variables such as income, occupational status, frequency of travel *et al*, thus allowing for ‘real’ world weighting and not ‘experiment’ weightings
- Measure scores for considerably more brands

Too many surveys repeat the content of previous ones. It would be a refreshing change if, for this survey at least, a second study stood on the shoulders of the first to gain deeper (as opposed to repetitive) insights into qualitative advertiser benefits on a range of print media. That is what the international agency and client marketplace would like and indeed wants.

However, as The Rolling Stones had occasional to point out: ‘You can't always get what you want’.

Though the next line was: “But you can try.”