

Affinity's FINEPRINT

Insights & Strategies for More Effective Print Advertising

Affinity · 3rd Quarter · 2005

Smokin'

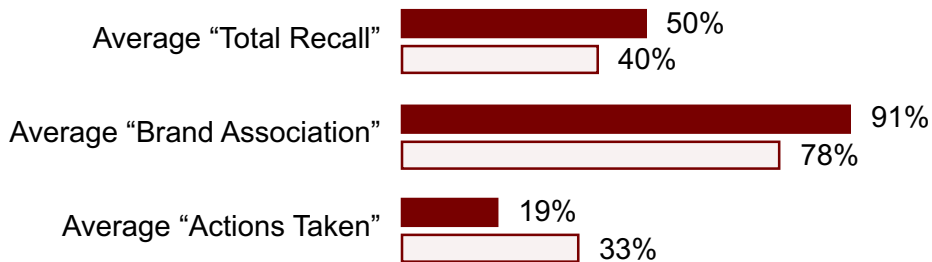
The Effectiveness of Tobacco vs. Anti-Tobacco Campaigns

The tobacco advertising category continues to spawn debate, as tobacco marketers actively promote their products in the pages of magazines. At the same time, a growing number of anti-tobacco campaigns are aggressively competing for readers' attention.

While much of the discussion has traditionally centered on audience delivery, and the appropriateness of those individual titles carrying tobacco ads, Affinity recently conducted an analysis focusing on an often overlooked dynamic of the debate - advertising effectiveness.

While the recall of tobacco ads is higher overall, and the brand association of those ads is stronger than anti-tobacco campaigns, the potential to prompt reader action is typically higher for smoking cessation drugs and quit assist programs.

■ Tobacco Ads □ Anti-Tobacco Ads



	Total Recall	Brand Association	Actions Taken
Tobacco Ads	50%	91%	19%
Cigarettes	54	91	19
Cigars	49	91	38
Smokeless Tobacco	41	90	15
Anti-Smoking Ads	40%	78%	33%
Drugs & Aids	45	83	29
Quit Assist Programs	35	74	36

* Brand Association and Actions Taken based on respondents recalling specific ads

In This Issue...

The Role of Print in the Mix for OTC Drugs & Remedies

The Best & Worst Campaigns for Brand Association

Differences in Reader Response by Print Genre

VISTA Norms - Q3/2005

Top Scoring Q2 Ads for Specific Reader Actions

The Impact of Tobacco Ads Versus Anti-Tobacco Ads

Success by Association

Measuring Brand Association Across Print Campaigns

The specific role that brand equity plays in the purchase process has been examined by researchers from a multitude of angles. One core conclusion is commonplace. Quite simply, a prospect must associate the advertised product with a unique brand in order for an ad to have any chance of success.

The VISTA rating service asks readers if they initially associated specific brands with the specific ads that they recalled seeing.

Following are examples of second quarter ads with the highest Brand Association scores, as well as a few examples that demonstrate how clueless some readers were when prompted about the sponsoring brand.

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Focus: OTC Drugs & Remedies

To identify the role that print plays in the total marketing mix for OTC drugs and remedies, Affinity fielded a series of studies in June among consumers who recently bought over-the-counter medications. The effort leveraged VISTA's custom capabilities by appending targeted questions to issue-specific VISTA surveys.

Q. Thinking about the over-the-counter medications that you recently purchased, which of the following, if any, helped you to decide what specific products or brands to buy?

Content	Something I read in a magazine article	23%
	Something I saw on a television program	20
	Something I read in a newspaper article	10
	Something I saw on an Internet Web site	8
	Something I heard on a radio program	4
Advertising	A television commercial	29%
	A magazine advertisement	21
	A newspaper advertisement	7
	An outdoor billboard promoting the product	4
	An advertisement on a Web site	4
	A radio commercial	4
Promotion	A coupon for the product	34%
	A mailing that I received about the product	10
POP	A free sample of the product	26%
	A display for the product at a grocery store, drug store, pharmacy or other retail location	16
	The packaging that the product came in	11
Other	My past experience with the product or brand	58%
	Recommendation from a doctor, pharmacist or other healthcare professional	34
	Recommendation from friend, family or business associate	31
	Something else influenced my purchase	5
	None of these	4

Source: Affinity's VISTA Print Effectiveness Rating Service/Custom survey modules

Base: 2,150 readers who purchased OTC drugs & remedies/past 3 months; multiple responses

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Different Readers - Different Results

Tracking Reader Action Across Print Genres

One of the key advantages of the print medium is the ability for advertisers to craft campaigns designed to meet a host of advertising objectives. As a result, there is an equally diverse set of potential actions that a reader might be prompted to take, depending on the campaign. Beyond building brands and driving sales, print campaigns are often launched to direct readers to a Web site, gather more information, recommend a product or service, or even save an ad for future reference.

The following charts identify the differences in the actions that readers reported taking as a result of exposure to specific ads appearing in different publication genres.

How to Read This Chart...

For each of the individual actions that readers took, or plan to take, as a result of ad exposure, an index of **100** was established as a benchmark. If the index for a specific action is less than 100, readers of that genre are less likely to take the featured action than readers across all publications on average. If an index is greater than 100, readers of that genre are more likely to take that action than readers across all publications. For example:

- ✓ Readers are **twice as likely** to “visit a store, dealer or other location” as a result of ads appearing in **Fashion** magazines, than ads appearing in all magazines in general
- ✓ Readers of **Sports** magazines are **half as likely** to “save an ad for future reference”, versus ads appearing in all magazines in general

Print Genre	Have a more favorable opinion about the advertiser	Gather more information about product/service	Visit the advertiser's Web site	Visit a store, dealer or other location
Business & Finance	125	127	150	83
Entertainment	83	82	70	100
Fashion	108	109	110	200
General Interest	92	91	70	83
Shelter	92	100	100	133
Men's	108	100	110	117
Newsweeklies	92	100	90	67
Parenting	92	91	70	117
Sports	92	72	80	83
Women's	75	82	70	100

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<u>Print Genre</u>	<u>Save the ad for future reference</u>	<u>Recommend the product/service</u>	<u>Consider purchasing the product/service</u>	<u>Purchase the product/service</u>
Business/Finance	117	100	61	57
Entertainment	50	80	100	114
Fashion	117	120	122	271
General Interest	83	80	94	86
Shelter	117	100	122	157
Men's	83	100	100	100
Newsweeklies	67	60	72	57
Parenting	100	160	150	200
Sports	50	60	83	71
Women's	83	100	133	171

Ads that did the BEST job of showcasing the brand...

Among issue-specific readers who recalled these ads, fully **100%** were aware of the sponsoring advertiser



Callaway Big Bertha



Buick Terraza



Giorgio Armani



Subway



Viagra



Lay's Light



Acura TSX

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And the **WORST...**

Among issue-specific readers who recalled these ads, **less than half** were aware of the sponsoring advertiser



GM OnStar



Altoids Sour Gum



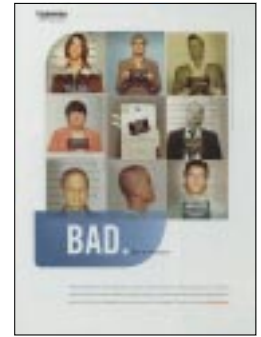
AT&T



Ritz Carlton



Today's Military



Toshiba

Highest Recalled Ads of the Quarter



One of the consistently top performing campaigns tracked by Affinity's VISTA service is the ongoing series of image ads created by the Milk Processor Education Board. The latest installment in the series, featuring *The View's* Meredith Vieira, is no exception.

This **Milk** ad, which appeared in a host of consumer magazines during the second quarter 2005, routinely ranked in the top tier for Total Recall, including the May issue of **Real Simple**, where nine out of ten readers made it the highest recalled ad of the quarter.



This multi-page ad for **McDonald's** appeared across a number of women's fashion and shelter titles, including **Allure** magazine, where it was one of the highest ranking ads of the quarter for Total Recall.

Almost nine out of ten issue-specific readers recalled the ad. The unit is printed on heavier paper stock and incorporates a perforated coupon for the advertised product - *McDonald's Fruit & Walnut Salad*.



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FINEPRINT is published quarterly for the marketing savvy and advertising astute. Comments, suggestions and routing to colleagues encouraged.



For more information about Affinity's VISTA Service, call
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OTC Drugs & Remedies Print in the Mix

Thinking about all of the advertising that you have seen recently for specific over-the-counter medications, please complete the following statements by checking only one answer for each.

The **most memorable** nonprescription drug ads appear...

On television	67%
In magazines	16
In newspapers	2
On the Internet	1
On the radio	1
On outdoor billboards	1
None of these	11

Memorable

The **most useful** nonprescription drug ads appear...

In magazines	53%
On television	18
On the Internet	9
In newspapers	6
On the radio	1
On outdoor billboards	-
None of these	12

Useful

The **most believable** nonprescription drug ads appear...

In magazines	35%
On television	19
In newspapers	7
On the Internet	6
On the radio	2
On outdoor billboards	-
None of these	32

Believable

The **most persuasive** nonprescription drug ads appear...

On television	48%
In magazines	22
On the Internet	3
In newspapers	3
On the radio	3
On outdoor billboards	1
None of these	21

Persuasive

Source: VISTA Print Effectiveness Rating Service/Custom survey modules
Base: 2,150 readers who purchased OTC drugs & remedies/past 3 months

Action Heroes • April-June 2005

Congratulations to the ads that ranked #1 - over all ads measured in Q2/05 - for each of the individual reader actions tracked by Affinity's VISTA Print Effectiveness Rating Service



#1 Mirra

Have a more favorable opinion about the advertiser



#1 GM HydroGen3

Gather more information about the product/service



#1 Epicurious.com

Visit the advertiser's Web site



#1 Target

Visit a store, dealer or other location



#1 Budget Blinds

Save the ad for future reference



#1 Verizon

Recommend the product/service



#1 Crest Pro-Health Rinse

Consider purchasing the product/service



#1 Kraft Mac & Cheese

Purchase the product/service

VISTA NORMS - Q3/2005

A Quarterly Update of the VISTA Print Effectiveness Database

	Total Recall	Actions Taken		Total Recall	Actions Taken
All Ads Measured	52%	52%	<i>Ad Category (con't)</i>		
Ad Size			Educational Products	47%	59%
Multi-page units	60%	57%	Electronic Components	45	38
Two-page spread	58	52	Energy & Utilities	45	36
Full page	52	51	Entertainment	54	49
Less than full page	42	50	Eyewear & Accessories	50	49
Color			Finance & Insurance	48	39
4-color	53%	52%	Fitness Equipment	50	41
Spot color(s)	48	44	Government	44	37
B&W	48	40	Hair Products	56	53
Cover Position			Home Improvement	53	55
Inside Front Cover	60%	53%	Horticulture	50	56
Inside Back Cover	52	52	Household Accessories	51	43
Back Cover	60	47	Household Appliances	58	57
Issue Position			Household Furnishings	50	54
1st half of issue	52%	52%	Household Products	52	64
2nd half of issue	51	52	Jewelry	56	47
Ad Category			Liquor	56	54
Agriculture	38%	27%	Manufacturing	42	43
Apparel & Accessories	58	55	Non-Profit Organizations	47	47
Area Development	39	38	Office Machines & Supplies	46	59
Automotive	52	43	Online Services	49	44
Aviation	49	44	Packaged Foods	56	66
Baby Care Products	56	57	Personal Care Products	53	55
Baby Foods	57	53	Pet Supplies & Services	53	40
Beauty Products	58	57	Photographic Equipment	48	61
Beverages	54	61	Printers & Peripherals	48	51
Business Services	45	55	Professional Services	43	39
Candy & Gum	58	66	Publishing	42	47
Computer Software	47	44	Real Estate	46	36
Computers & Technology	50	48	Recreational Vehicles	50	48
Consumer Electronics	54	56	Restaurants	60	67
Dairy/Produce/Meats	58	61	Retail	59	60
Dental Products	50	58	Schools/Camps/Seminars	38	40
Diversified Corp. Services	64	45	Specialty Items	52	32
Drugs & Remedies	48	43	Sporting/Entertainment Events	48	45
			Sporting Goods	58	59
			Telecommunications	50	42
			Tobacco Products	44	23
			Toys & Games	51	50
			Transportation & Shipping	51	57
			Travel	52	60

Source: VISTA Print Effectiveness Rating Service; "Actions Taken" based on respondents recalling specific ads (Measured actions include: Have more favorable opinion about advertiser, Recommend product/service to a friend, colleague or family member, Gather more information about advertised product/service, Visit advertiser's Web site, Consider purchasing/purchase advertised product/service, Visit store, dealer, or other location, Save ad for future reference.)