

# Affinity's FINEPRINT

Insights & Strategies for More Effective Print Advertising

4th Quarter • 2006

## Pass It Along Measuring the Value of Pass Along Readership

For many magazines, pass along readership can represent the largest contribution to a title's total audience - over retail buyers, public place readers, and even subscribers. But what is the contribution of pass along readership to advertising effectiveness?

To shed light on this important audience segment, Affinity recently fielded a benchmark study in conjunction with its syndicated VISTA Print Effectiveness Rating Service. A set of tailored questions were fielded solely among readers who obtained their copies of VISTA measured issues via pass along, resulting in more than 3,200 interviews across 70 different magazine titles.

In addition, the standard ad effectiveness ratings tracked by the VISTA Service were examined among pass along versus total magazine readers.

### Pass Along vs. Total Readers

Pass Along Readers		Total Readers	
Total Recall	48%	Total Recall	52%
Brand Association	81	Brand Association	83
Actions Taken (net)	53	Actions Taken (net)	51

#### Actions Taken Detail

	Pass Along Readers	Total Readers
Have a more favorable opinion	10%	12%
Gather more information	10	11
Visit advertiser's Web site	10	10
Visit store, dealer, other location	7	7
Save ad for future reference	6	6
Recommend product/service	5	5
Consider purchasing product/service	18	19
Purchase product/service	6	7

Source: VISTA Print Effectiveness Rating Service, 2006  
Base: Brand Association and Actions Taken based on respondents recalling specific ads

The topline findings suggest that while advertising recall scores skew slightly lower among pass along readers on average, there is no measurable difference in the level of reader response generated, or in the unique actions that readers take, or plan to take, as a result of exposure to specific print campaigns among pass along vs. total readers.

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### Endemic Edit

Do Endemic Articles Generate  
Higher Readership Levels?

This year, Affinity's VISTA Service will measure the readership of more than 3,000 articles appearing in the country's leading business and consumer publications.

Categorizing the measured articles by topic makes it possible to compare the readership levels of endemic versus non-endemic editorial features appearing in different magazine genres.

As one might expect, some articles score higher when the topic covered complements the magazine's genre or the niche audience served by the title. As the following chart illustrates, however, there are also other topics where readership levels for certain types of articles are actually higher outside the endemic magazine genre.

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Articles in endemic publications that score **above** the norm...

		Average Readership
Auto articles...	in <i>Automotive</i> pubs	59%
	in all other pubs	51%
Fashion articles...	in <i>Fashion</i> pubs	60%
	in all other pubs	52%
Parenting articles...	in <i>Parenting</i> pubs	57%
	in all other pubs	48%

Articles in endemic publications that score **below** the norm...

		Average Readership
Fitness articles...	in <i>Fitness</i> pubs	53%
	in all other pubs	62%
Travel articles...	in <i>Travel</i> pubs	49%
	in all other pubs	58%
Food articles...	in <i>Culinary</i> pubs	58%
	in all other pubs	62%

Source: Affinity's VISTA Print Effectiveness Rating Service, 2006

**Highest Recalled Ads of the Quarter**



Tab Energy



Revlon Luxurious Lengths Mascara



Cingular Wireless



ABC - Desperate Housewives

**Beverages** This campaign for **Tab Energy** appeared as a full page, four-color unit across a number of women's service and women's fashion titles in the third quarter, including the August issue of **W** magazine, where this top scoring beverage category ad was recalled by 77% of readers.

**Telecom** This **Cingular Wireless** campaign, appearing in a variety of business publications, personal finance titles and golf enthusiast magazines, outpaced all other telecommunications category ads, including a four-color page in the September issue of **Inc.** that was recalled by more than seven out of ten issue-specific readers.

**Beauty Products** Appearing as both full page, four-color units and two-page spreads in select fashion, women's and entertainment magazines, this **Revlon Luxurious Lengths Mascara** campaign ranked #1 in the category, with an impressive 80% recall score in the August issue of **Glamour**.

To find out which ads were top performers in other VISTA categories, please contact Affinity at (212) 922-9582

**Entertainment** **ABC's Desperate Housewives** campaign featured the highest recalled entertainment ads of the quarter. Appearing in both full page and multi-page formats, the campaign appeared in the Sunday newspaper supplements, including the September 22nd issue of **Life**, where almost nine out of ten readers recalled seeing the ad.

# On the Record

*An Ongoing Series of Conversations with Industry Leaders*

## George Janson • Managing Partner, Director of Print • Mediaedge:cia

*This year, Mediaedge:cia will place ads in more than 600 publications on behalf of iconic brands as diverse as Accenture, Campbell's Soup, Chanel, Colgate and Lincoln Mercury. The driving force behind the agency's creative media strategies is one of the industry's most outspoken advocates.*

### What is the single greatest challenge facing the print medium today?

The print industry is facing a multitude of challenges. The pressure to maintain rate base and profitability in an oversaturated marketplace, the need to disclose data in a timelier and more transparent manner, and the challenge of finding new and unique ways to engage the next generation of readers to mention just a few. Despite these challenges, I believe that this is an exciting time for the magazine industry. New ABC rules will encourage magazines to find creative and profitable ways to attract new readers, and perhaps we can abandon the traditional notion that "bigger is better". Economic challenges are encouraging magazines to find alternate revenue streams and new ways to connect consumers with their brands. And if the industry is serious about delivering more timely and transparent data, they will be on a more level playing field with TV and the Internet.



### How should magazines be leveraging the Web?

The Internet represents a potential gold mine for magazines because it complements one of magazines' core strengths – providing accurate, credible content. Especially content that can be tailored for the Web user, going beyond what's covered in the pages of the printed magazine. Ultimately, it won't matter how the consumer obtained this content, but the fact that they did, and that it satisfied their information or entertainment needs.

### How has the role of print changed within your company's overall media buying strategy?

Most marketing initiatives today are multi-channel. Consumers have relationships with multiple media platforms that reflect both communication and

transaction experiences. Many advertisers are shifting their dollars to media that can demonstrate timely performance. Exposure to magazine advertising is often delayed, as opposed to TV advertising, where most exposures occur immediately. Our continual challenge is to adequately represent the contribution of magazines to an overall campaign.

Many of our internal discussions are centered around the magazine "brand", in which print and paper represent just one potential consumer touch point. We are also trying to get our clients to think beyond traditional ad units. We're constantly championing new, unique units (even fractionals) that will grab a consumer's attention and create impact.

### When you evaluate publications for your media plans, what are the key criteria you use?

Does the title serve its audience? Are its readers the type of people we want to reach? Is the circulation vital or is it merely being treated as a commodity? Is it priced fairly?

And can publishers provide proof of performance measures like advertising recall, reader action and circulation delivery?

### How has today's ROI challenge impacted your own role within Mediaedge:cia?

Advertisers are much more determined to maximize sales and minimize costs. Every strategic and tactical decision that we make is intended to increase their bottom line. This adds significantly to the complexities of tracking a campaign, and requires the integration of information from many sources to provide a comprehensive assessment.

Personally, I'm working closer than ever with our Print Research team in developing practical applications

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## Action Heroes • July-September 2006

Top Scoring Ads of the Quarter for Specific Actions Taken by Readers



### #1 Studio by JCPenney

Have a more favorable opinion about the advertiser



### #1 Windows Mobile

Gather more information about the product/service



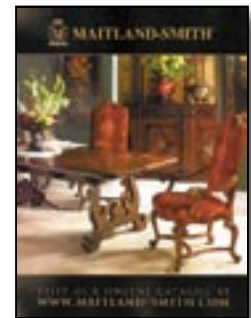
### #1 Pier One

Visit a store, dealer or other location



### #1 Zappos.com

Visit the advertiser's Web site



### #1 Maitland-Smith

Save the ad for future reference



### #1 Boppy

Recommend the product/service



### #1 Knorr Lipton Cajun Sides

Consider purchasing the product/service



### #1 Hefty OneZip

Purchase the product/service



Looking for past issues  
of FINEPRINT?  
**AffinityResearch.net**

*Affinity*

VISTA Rating Service  
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Custom Research Solutions  
Competitive Campaign Analysis  
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FINEPRINT is published  
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savvy and advertising astute.  
Comments, suggestions and  
routing to colleagues  
is encouraged.



For more information about  
Affinity's VISTA Service, call  
**(212) 922-9582**

## Pass Along Reader Survey

### Source of pass along copy...

Friend	36%
Family member	32
Business Associate	21
Other	11

### Reason copy was passed along...

I regularly share magazines with this person	60%
The issue featured an article that interested me	13
The magazine was routed to me at my work	13
Someone wanted me to try the magazine	9
I requested the issue from someone	6
The magazine was given to me as a gift	3
Other	6

\*Multiple responses

### Personal experience with passed along copy...

It was the first time that this magazine was passed along to me	11%
This magazine is passed along to me on an occasional basis	54
This magazine is passed along to me on a regular basis	35

### Previous experience reading passed along magazine...

Yes, I have read this magazine before	86%
No, I have never read this magazine before	14

### Likelihood of subscribing to title based on pass along experience...

Very likely	12%
Somewhat likely	58
Not at all likely	29
I already subscribe	1

### Likelihood of buying title at retail based on pass along experience...

Very likely	13%
Somewhat likely	54
Not at all likely	32
I already buy it at a retail outlet	1

### Additional titles passed along at the same time...

Only this issue was passed along to me	47%
This magazine was passed along to me with one or two others	40
This magazine was passed along to me with three or four others	10
This magazine was passed along to me with five or more others	4

### Action taken when finished reading pass along copy...

Saved it for future reference	20%
Passed it along to someone else	36
Returned it to the person that passed it to me	23
Discarded it	18
Other	4

Source: Affinity, 2006

Base: 3,263 issue-specific pass along readers

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## Top Performing Q3 Editorial Features



### One Sexy Mother

Harper's Bazaar  
August 2006

Read/looked into	92%
Read more than half	73%
Actions taken (net)	48%



### 2006 Fall Preview

TV Guide  
September 11, 2006

Read/looked into	88%
Read more than half	69%
Actions taken (net)	72%



### The 15 Healthiest Foods

Woman's Day  
September 12, 2006

Read/looked into	83%
Read more than half	75%
Actions taken (net)	85%



### America's Best Hospitals

U.S. News & World Report  
July 17, 2006

Read/looked into	82%
Read more than half	65%
Actions taken (net)	70%



### Confessions of a Snake Charmer

Maxim  
August 2006

Read/looked into	81%
Read more than half	68%
Actions taken (net)	57%

Note: Extent of Readership and Actions Taken based on respondents reading specific articles (Editorial Actions Taken include: Save article for future reference, Pass it along to someone, Gather more information on the topic, Visit a related Web site, Some other action)

## Recipe for Success

Affinity's VISTA Service measures the impact of ads in the **Packaged Foods** category, as well as packaged foods ads featuring recipes.

On average, recipes ads are more effective - generating higher recall, brand association and net actions taken scores, specifically among readers who report that they will save the ad for future reference or are planning on purchasing the packaged food product as a result of the campaign.

### All Packaged Foods Ads

Total Recall	54%
Brand Association	90%
Actions Taken (net)	64%

### Actions Taken Detail

Save ad for reference	4%
Purchase intent	21%

### Packaged Foods Ads That Feature a Recipe(s)

Total Recall	60%
Brand Association	92%
Actions Taken (net)	71%

### Actions Taken Detail

Save ad for reference	11%
Purchase intent	25%

Source: Affinity's VISTA Service, 2006

Base: Brand Association and Actions Taken based on respondents recalling specific ads

Know someone who  
should be receiving  
**FinePrint?**

Just let us know and we'll  
add them to the list...

[tom@AffinityResearch.net](mailto:tom@AffinityResearch.net)

## On the Record - George Janson, Mediaedge:cia

and models that will bring us closer to measuring ROI. Focusing specifically on print ROI, however, it is extremely challenging. Our experience suggests that print ROI varies between brands, with different categories of products, and against different consumer targets.

We strongly believe that print “works” and that consumers respond to it. Across all media, magazine advertising is typically found to be less objectionable and least likely to be filtered out by consumers. On the other hand, it is often difficult to “prove” performance because only some consumers, some of the time, respond in a visible way, actually changing their behavior immediately after reading an ad. That does not mean that others are not responding – we have to infer that to some extent. But without timely audience data and better proof of performance measures we are often left to model the return on our print investment.

### Has the ROI challenge influenced or changed your relationships with publishers?

We encourage publishers to provide more frequent audience, circulation and response measures. And we assess their ability to provide multiple touch points with their readers, whether these contacts are made on-line, through marketing programs, or through other line extensions.

### What can publishers do to effectively demonstrate a return on your client’s investment?

Try to include some measure of accountability for things such as unique ad units and sponsorships, and partner with us on research that has relevant applications. If a magazine is asking us to invest additional dollars for these types of initiatives, we have to be able to justify the incremental cost to our clients.

### In your opinion, what is the correlation between reader engagement and advertising performance?

We know that some magazines achieve higher ad recall scores than their competitors, so the environment that a particular magazine offers is important... and it’s often a plus. However, the contribution that reader engagement makes is small compared to other factors such as creative, audience composition and the reader’s genuine interest in the product being advertised, which ideally result in reader actions that can be quantified.

## Pass Along Reader Survey

### *Subscriptions as a result of pass along...*

Yes, I’ve subscribed to a magazine that was initially passed along to me	73%
No, I’ve never subscribed to a magazine that was initially passed along to me	27%

### *Retail purchases as a result of pass along...*

Yes, I’ve bought a magazine at retail that was initially passed along to me	79%
No, I’ve never bought a magazine at retail that was initially passed along to me	21%

### *Attitudes and Opinions...*

	<b>Strongly Agree</b>
Receiving a magazine from someone is a great way to try it before I subscribe myself	61%
I read magazines that are passed along to me the same way I read magazines I buy myself	48%
When I finish reading a magazine, I usually think of someone that I can pass it along to	36%
I would rather have someone pass along a magazine to me than buy it myself	26%

## VISTA NORMS

	Total Recall	Brand Assoc.	Actions Taken
<b>All Ads Measured</b>	<b>52%</b>	<b>83%</b>	<b>51%</b>
<b>Ad Size</b>			
Multi-page units	60%	86%	55%
Two-page spread	57	85	52
Full page	52	84	51
Less than full page	41	75	48
<b>Color</b>			
4-color	53%	83%	52%
Spot color(s)	49	82	44
B&W	46	77	46
<b>Cover Position</b>			
Inside Front Cover	57%	79%	50%
Inside Back Cover	53	87	49
Back Cover	60	89	46
<b>Issue Position</b>			
1st half of issue	53%	83%	51%
2nd half of issue	52	83	52
<b>Ad Category</b>			
Agriculture	43%	63%	41%
Apparel & Accessories	56	85	54
Area Development	38	70	43
Automotive	52	84	43
Aviation	49	72	44
Baby Care Products	57	91	56
Baby Foods	56	91	48
Beauty Products	57	87	58
Beverages	55	88	60
Business Services	46	81	53
Candy & Gum	55	88	64
Computer Software	46	75	45
Computers & Technology	51	78	48
Consumer Electronics	51	80	54
Dairy/Produce/Meats/Fish	60	87	59
Dental Products	50	88	58
Diversified Corp. Services	48	75	47
Drugs & Remedies (DTC)	50	82	33
Drugs & Remedies (OTC)	48	83	48

*Ad Category (con't)*

	Total Recall	Brand Assoc.	Actions Taken
Educational Products	50%	82%	59%
Electronic Components	44	79	38
Energy & Utilities	47	80	42
Entertainment	54	84	50
Eyewear & Accessories	53	86	48
Finance & Insurance	47	80	39
Fine Jewelry	55	81	47
Fitness Equipment	52	84	43
Government	43	76	34
Hair Products	55	85	54
Healthcare	40	63	40
Home Improvement	52	75	55
Horticulture	49	76	58
Household Appliances	55	77	51
Household Furnishings	52	78	54
Household Products	51	85	63
Liquor	56	87	54
Manufacturing	43	66	43
Musical Instruments	41	60	43
Non-Profit Organizations	47	70	48
Office Machines & Supplies	46	80	60
Online Services	46	77	42
Packaged Foods	55	90	65
Personal Care Products	54	87	59
Pet Supplies & Services	52	84	41
Photographic Equipment	47	83	58
Printers & Peripherals	46	80	50
Professional Services	46	72	40
Publishing	45	74	45
Real Estate	46	74	38
Recreational Vehicles	49	78	41
Restaurants	60	90	62
Retail	57	84	59
Schools/Camps/Seminars	38	72	41
Specialty Items	53	75	36
Sporting Goods	58	86	58
Sporting/Ent./Cultural Events	45	78	44
Telecommunications	48	80	43
Tobacco Products	47	89	22
Toys & Games	53	83	52
Transportation & Shipping	50	87	53
Travel	51	81	56

*Source: VISTA Print Effectiveness Rating Service (Jan 2005-Sept 2006); Brand Association & 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.)*