Print Media Academy

HEIDELBERG

The Strengths of Print for Brand and Corporate Communication

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Comparative Study of the Advertising Impacts of Print and Electronic Media

A joint study project by the Print Media Academy of Heidelberger Druckmaschinen AG and the Faculty of Advertising and Marketing Communication of Stuttgart Media University (winter semester 2007/2008)

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Subject to technical modifications and other changes.

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Foreword

Dear reader,

As part of Heidelberger Druckmaschinen AG, the leading provider of solutions for print shops with a focus on offset printing, the Print Media Academy is an internationally active training institute serving the print media industry. We currently operate 18 facilities in 15 countries. Each year, some 17,000 participants take advantage of our comprehensive program of courses and seminars on technical and business topics.

Our main job is to collect and pass on knowledge related to all aspects of the medium of print. We have therefore worked with the Stuttgart Media University to prepare this study on the relevance of print media in the age of Web 2.0 and Internet TV. This project by the Faculty of Advertising and Market Communication has made an important contribution to the current debate on media-related issues.

I hope you find the study stimulating and enjoyable to read. On behalf of the Print Media Academy, I would like to thank the project team for its first-class work.

Bernd Schopp
Director of the Print Media Academy

Print Media Academy

I. Executive Summary

Based on findings about how daily newspapers, magazines, product brochures and business reports convey information and advertising messages, this study reveals a great deal about the strengths of printed media – independently of the concrete forms they take and who publishes them. It also shows how and why print yields the best results in combination with TV and the Internet. Overall, the study provides the print media community with valuable insights and arguments. It lets marketing decision-makers, creatives and print buyers deploy print products even more successfully to achieve specific aims.

THE STRENGTHS OF PRINT: CONTEXT AND SUSTAINABILITY

A trend is coming into focus: while the electronic media of television and the Internet are developing into an entertainment-oriented platform for obtaining information, print media are consolidating their role as a contextual information platform. In the future, television and the Internet will primarily meet the need for large quantities of rapidly available information. By contrast, print media will continue to satisfy the longer-term wish for higher quality, sustainable information at a slower, "decelerated" pace.

SECONDARY ANALYSIS: ADVERTISING IMPACT, COMPLEMENTAR- ITY AND MEDIA MIX · In other words, print enables sustained reception of information and therefore also allows advertising to have a longer-term, more profound impact. This is one of the main findings of this study, for which 80 other studies were reviewed in a secondary analysis and 20 of them subjected to in-depth scrutiny. This study project has also revealed that high credibility and suitability for addressing specific target groups is ascribed to the medium of print as part of the media mix. The greatest advertising impact is achieved when print and electronic media are combined with one another. For example, it can be effective to use one medium to communicate a "teaser" for a campaign that is then conducted in another medium: for exam- ple, print ads for a television commercial or Web banners to call attention to a print campaign. The two media platforms then complement one another in how they impact and are received by the audience, instead of competing.

THE MEDIA TEST: PERCEPTUAL DIFFERENCES AND MESSAGES · Television and the Internet have altered how media are perceived and utilized, to a large extent because of how they flood users with rapidly changing images and scenes. A laboratory test of three campaigns conducted within the scope of this study has confirmed that the impact of advertising does not only depend on its content and messages; it also depends on the special characteristics of the presentation medium (e.g., whether it is a print ad, a Web banner or a television commercial). For evoking

interest or emotionally addressing target groups with clear messages, the medium of print is most effective, assuming that the messages are formulated and visually presented in an attractive and precise manner. This was shown by recall rates in about 60 test subjects. Where print advertising is concerned, this makes it essential to follow classical advertising rules such as the KISS formula (Keep It Simple, Stupid).

EXPERT ROUND TABLE: THE "GUTENBERG GALAXY" HAS PLENTY OF POTENTIAL · At a round table conference, seven experts from different industries described the potentials of the medium of print from their perspectives. These potentials include the opportunities that will arise from further technological advances and innovations in the printing industry. They particularly stressed the greater enjoyment that results from receiving information and advertising messages through the medium of print as compared to the electronic platforms. Where advertising is concerned, the ability of print to sustainably and precisely address target groups, among other things, is an important argument in its favor. In combination with electronic media (in a media mix), not only can it be expected to have the greatest impact, but its effect can also be amplified at the regional, national and international levels. The experts all shared the conviction that the "Gutenberg galaxy" will continue to expand.

II. The Basis: Knowledge from Other Relevant Studies

The scientific basis for this study consisted of 80 other studies, which were selected on the basis of their relevance, cost-free availability and currentness. After analyzing this knowledge pool and applying the 80-20 Pareto rule, the most important 19 studies were left. The secondary analysis was divided into three areas: "Overview of media use", "Comparison of the media of print, TV and the Internet" and "The impact of print in the media mix".

1 OVERVIEW OF MEDIA USE

1.1 CURRENT TRENDS · Which media are used today and will continue to be used in the future? Several trends can be observed. Generally speaking, expectations regarding the quality of individual media are rising. Although readers, viewers and listeners are willing to spend more time consuming media, they are also paying more attention to selecting content that corresponds to their interests and needs. Consequently, on the whole competition for consumers' media-time budget is therefore intensifying. It is also clear that in the future they will become even more proficient, turning into "professional multimedia users". Although the Internet and use of it will continue to spread as a result of this, the classical media will nevertheless still play major roles.

Average time spent on media in 1980, 2000 and 2005

For Germany overall, Mon.-Sun. from 5 a.m. to midnight (min./day)

	1980	2000	2005
TV	125	185	220
Radio	135	206	221
Daily newspapers	38	30	28
Magazines	11	10	12
Books	22	18	25
CDs/MCs/LPs/MP3	15	36	45
Videos/DVDs	–	4	5
Internet	–	13	44
Total media consumption	346	502	600

Fig. 1: Media time budgets and daily use

Media use from 2000/2001 to 2004/2005

	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005
Watching TV	91	90	90	89	89
Listening to the radio	84	84	83	82	81
Reading the paper	84	83	82	80	79
Listening to records/ cassettes/tapes/CDs	44	44	43	43	42
Reading magazines	40	39	39	36	35
Reading books	35	36	37	37	37
Using computers	30	34	38	41	44
Watching VCs/DVDs	7	8	8	8	11

Fig. 2: Media use in the future

1.2 REASONS FOR USE AND STRENGTHS, ILLUSTRATED BY DAILY NEWSPAPERS AND MAGAZINES · The readers of daily newspapers mainly want to learn about current events and form opinions about social, political and economic issues. Detailed information and background are the trumps that daily newspapers can play. On the basis of their credibility and seriousness, they offer a way for their readers to get their bearings in today's world. It is also important for them to focus on a particular region. Older target groups (golden agers) also see daily newspapers as a source of entertainment and a pleasant way to pass the time.

Direct comparison of reasons to use different media

For Germany overall, persons 14 years and older, first or second choice (%)

	TV		Radio		Daily news-papers		Internet	
	2000	2005	2000	2005	2000	2005	2000	2005
So I can discuss issues	77	75	49	45	62	56	11	24
To get food for thought	74	71	53	46	60	52	13	31
To get up to speed	73	69	45	41	68	59	13	30
To relax	89	88	81	77	24	21	5	13
Because I enjoy it	86	85	72	62	27	22	14	31
So I won't feel lonely	87	86	79	75	21	18	6	18
To forget about everyday life	87	88	78	72	22	19	7	19
Out of habit	78	78	71	67	46	40	4	14
Because it helps me cope with everyday life	70	66	56	51	61	55	10	27

Fig. 3: Media use in the future

Magazines are popular because of their in-depth information, their entertainment value and the enjoyment of reading them. They achieve the latter with conceptually and visually attractive content. They not only set agendas, but also evaluate and weight them. Magazines also make a contribution to decelerating media consumption. The advertising industry will continue to take advantage of these factors in the future, which the expert round table confirmed (see page 51).

1.3 THE TARGET GROUPS OF PRINT · Current studies (see Figures 4 and 5) substantiate the general impression that young target groups are particularly drawn to the Internet, despite the fact that half of those between the ages of 14 and 19 state that they read the newspaper several times a week. Newspapers are primarily read by "golden agers", in addition to being the medium preferred by individuals with higher incomes. This includes the group of so-called "post-materialists": well-educated, successful in their careers and with money to spend, these individuals use print media to an above-average extent (Fig. 6). The reason for this has to do with their strong desire for self-realization, rewarding leisure activities and sound background information. Another group with an affinity for print media is that of the "modern performers". These are the cream of the crop of the young urban professionals. Because they also drive new trends, they are especially interesting to the advertising industry.

From the standpoint of marketing and advertising, print is espe-
cially attractive for several reasons. For one, print advertising
is not annoying. The opposite is true: it is a contact medium that
is consciously allowed. Recipients are addressed while they
are in a calm state of mind for reading. This enhances the im-
pact of advertising. And finally, print advertising conveys exclu-
sivity, seriousness and information in connection with leading
brands and products. Taken as a whole, these factors explain
why a disprortionately great sum is spent on print advertising.

Media use in 2005 by target groups

Persons 14 and older (%)

Several times a week …	Overall	Men	Women	14–19	20–29	30–39	40–49	50–59	60–69	70+
Watching TV	89	88	90	90	83	85	87	90	95	95
Listening to the radio	81	81	82	71	73	82	85	86	85	80
Reading the paper	97	79	78	52	64	72	81	88	90	87
Using computers	44	54	35	74	68	59	52	41	21	9
Listening to records/ cassettes/tapes/CDs	42	43	40	75	62	51	43	34	27	18
Reading books	37	28	45	36	33	34	37	38	40	42
Reading magazines	35	34	36	29	28	31	34	38	42	43
Watching VCs/DVDs	11	14	9	23	22	14	10	7	6	5

Fig. 4: Media use in the future

Internet use in Germany in 2000 and 2005

Persons 14 years and older, occasional use (%)

	Overal	Men	Women	14–19	20–29	30–39	40–49	50–59	60+
2000	29	37	21	49	55	41	32	22	4
2005	58	68	49	96	85	80	71	57	18

Fig. 5: Media use in Germany

Sinus Milieus® in Germany

Educated and well-to-do target groups tend to have a greater affinity for print.

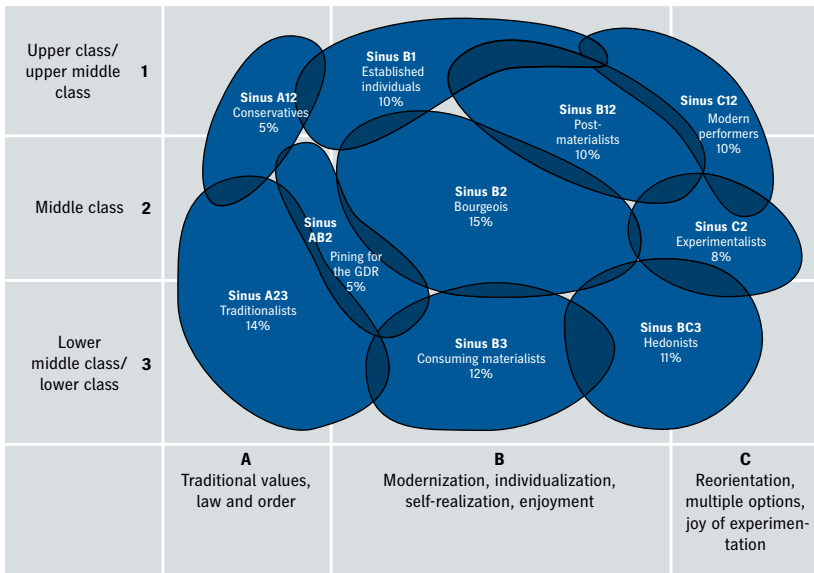|	A Traditional values, law and order	B Modernization, individualization, self-realization, enjoyment	C Reorientation, multiple options, joy of experimen- tation
Upper class/ upper middle class **1**	Sinus A12 Conservatives 5%	Sinus B1 Established individuals 10% — Sinus B12 Post- materialists 10%	Sinus C12 Modern performers 10%
Middle class **2**	Sinus AB2 Pining for the GDR 5%	Sinus B2 Bourgeois 15%	Sinus C2 Experimentalists 8%
Lower middle class/ **3** lower class	Sinus A23 Traditionalists 14%	Sinus B3 Consuming materialists 12%	Sinus BC3 Hedonists 11%

Fig. 6: Sinus Sociovision

1.4 CONCLUSIONS · "When it comes to selectively publishing and commenting on information, traditional media are unbeatable. Their competence has a special appeal. Trust and responsibility, truth and clarity call for a credible source — and a centralistic, authoritarian form of organization. (…) Young target groups are also susceptible to authoritative sources of information." (Cordula Krüger of Equity, "Zukunftswerkstatt Medien: Medien-Qualitäten", HORIZONT 45/2006)

2 COMPARISON OF THE MEDIA OF PRINT, TV AND THE INTERNET

Whenever a marketing decision-maker, creative or print buyer wants to systematically leverage media, they have to be familiar with their strengths and best applications. Print, television and the Internet are therefore compared, analyzed and evaluated in the following, applying the criteria of information and impact.

This comparison is based on qualitative and quantitative studies carried out by TNS Emnid ("On the Future of Print"), Grüner + Jahr ("Panel on the Effectiveness of Advertising"), VDZ ("Pilot Study: Why Crossmedia Works Better") and IMAS International ("On the Credibility of Advertising Media in 2007"). (The titles are translated here; the articles are only available in German.) General criteria for comparison were derived from the most important insights of these studies, which are applied in the figures to evaluate the individual media.

The findings of the qualitative studies, which were applied for ranking purposes, are explained in the figures. It was also possible to quantify some of the evaluations. The corresponding percent-ages are only provided in the figures as supplementary information, however. The actual comparisons are made on the basis of a three-value scale (very poor – good – very good or very low – moderate – very high).

2.1 INFORMATION

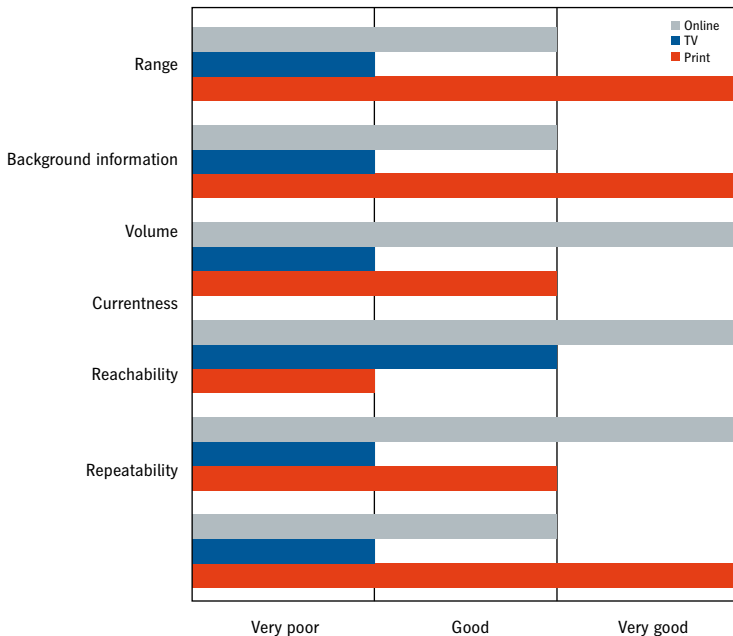## "Information" as a criterion for comparison

Fig. 7: Chart prepared based on consulted studies (see appendix)

THE RANGE of information covers two aspects. One is the range of topics addressed in the three compared media, and the other is the medium that recipients prefer for obtaining information. Print, with its wide range of topics, takes first place here. Fifty-five percent of the population uses the medium of print to get information, while 32 percent state that they consult online media. Because television is a random medium — i.e., viewers can not always decide themselves what they want to see — it takes third place.

BACKGROUND INFORMATION: Print adds details about a product or service. These can extend from information on a wide spectrum of topics all the way to background information and commentaries. Of course, the Internet does this too: 46 percent therefore now use the Internet more than print to get information. In the case of television, the focus is not on systematically gathering information. (The aspect of "seriousness", which is very important in connection with background information, is covered in section 2.2 "Impact".)

It is in a medium's favor if it can offer a large VOLUME OF INFORMATION, which applies to the Internet in particular. However, print has an edge when it is about coping with the flood of available information, which is often perceived as "oppressive". With print, recipients are not helplessly overwhelmed by the sheer volume of information; instead, they keep the reins in their hands.

CURRENTNESS: The Internet has left print behind in terms of how up-to-date its information is. Television is also strong when it comes to quickly facilitating contacts. Print therefore only takes third place here.

REACHABILITY: Those who wish to get information online can now access the World Wide Web (nearly) everywhere: in an Internet café, at work or at home. Television is still relative inflexible in this regard, although this will change with IPTV and mobile TV. The criterion of "reachability" also includes the aspect of "mobility", where the easily used and portable medium of print has a distinct advantage. Electronic media will always depend on more or less costly and fragile output devices that users cannot carry around without taking at least some care to prevent them from being damaged.

REPEATABILITY refers to the ability to systematically get the same information multiple times whenever it is needed. With print and the Internet, users decide themselves how often and how intensively they take advantage of what is available. The medium of television is still much more "fleeting", meaning that content consumed once is impossible or difficult (only with the aid of recording equipment) to access again.
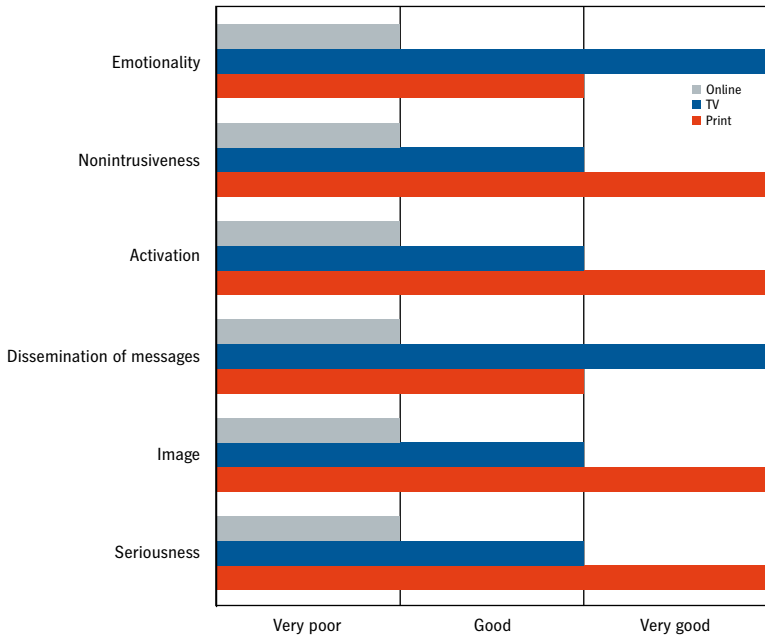
2.2 IMPACT

"Impact" as a criterion for comparison

Fig. 8: Impact as a criterion for comparison, chart prepared based on consulted studies (see appendix).

EMOTIONALITY: As everyone knows, feelings and emotions can best be conveyed through the medium of TV. At the same time, however, print is perceived as sensual and stimulating because of its esthetics (e.g., design, layout and imagery). As a consequence of the steadily widening possibilities of modern printing technology, print now also offers more and more options for more effectively communicating emotions.

NONINTRUSIVENESS is a strength of print. Many viewers experience television commercials as annoying, but only rarely do readers of print media react similarly to print ads. Print is not intrusive. Print has time. Users can always decide whether or not, when and how intensively they consume content. Apart from the commercials, however, the medium of TV is also relatively nonintrusive because it is usually used more for relaxing than for obtaining information. Online advertising, by contrast, does not stay in the background. Popups and flash animations in particular are experienced as invasive.

ACTIVATION: Print promotes sales, for examples when products for everyday use are advertised in newspapers. Because daily newspapers are primarily read early in the day, advertisements can prompt immediate purchasing decisions. Television gives 21 percent of consumers ideas for purchases. The advantages of TV are that it quickly makes contact and has a strong activating effect due to the emotional impact of this electronic medium.

DISSEMINATION OF MESSAGES: The medium of TV can be used to reach many people in a short time. Its large range plays an especially important role in connection with new products. The use of images and sound also lets complex products and services be presented in an understandable way and messages effectively conveyed. Print extends, amplifies and deepens advertising messages, but because of the limited amount of information it can convey is less well-suited for communicating new or complex messages. Print is used for long-term branding purposes. Print brings brands closer to people.

IMAGE: Of all three media, print has the best image. This medium is appreciated as being democratic, controllable, credible, mobile, reliable, well-organized, direct, sensual, stimulating and repeatable. The Internet is perceived as "visually unattractive".

SERIOUSNESS refers not only to the dependability of a source of information, but also to the quality of the information itself. Quality and seriousness are ascribed to print advertising. Print brands in particular are regarded as "seals of quality" for other brands. Overall, print still takes first place here over the other two communication media. Over 60 percent of those surveyed attribute the greatest credibility to the various forms of printed information. Television is still considered by 57 percent to be a source of credible information. The Internet lags far behind: in 18th place, with only 33 percent of contestants favoring it. In other words, the Internet is still not widely regarded as very credible – unless a message's sender (and the corresponding website) and/or the context of the advertising is considered by users to be so (e.g., if a reputed print brand such as Germany's "Der Spiegel" magazine is published on the Web in an online edition).

2.3 CONCLUSIONS · Print is characterized by several aspects:
- Print covers a comprehensive range of topics and thus meets different needs, from thematic overviews to in-depth background information.
- Print stems the flood of information and is important to all age groups. Print is ubiquitous, print is impossible to escape. But print is also nonintrusive, because recipients decide themselves whether to use the medium or not.

- Print has an impact due to its esthetics; it uses design, layout and photography to stimulate interest.
- Print prompts consumers to buy, owing to its good image and high credibility.

The Internet can score points in terms of "information" but lags behind in terms of its impact:
- The Internet offers a large volume of up-to-the-minute information.
- The Internet makes use of many new, innovative technologies and possibilities for communication.
- Adverting in the World Wide Web, and especially banners and popups, have so far failed to have an emotional effect; in fact, these are often perceived as annoying.

The medium of TV is losing ground to print and the Internet:
- Watching television has a very emotional impact, but is less informative and flexible.
- Television ensures fast contact with viewers, has a strong activating effect and powerfully delivers messages.

3 THE IMPACT OF PRINT IN THE MEDIA MIX

3.1 COMBINED TV/PRINT ADVERTISING CAMPAIGNS · In the following, examples of combined TV/print campaigns by the automotive and body care industries are considered to illustrate the general advantages of print advertising: high access to important target groups, high contact density and high recall and acceptance of advertising messages.

The car campaign shows that the share of print – measured by the volume of printed advertising – is well above the share of spending (Fig. 9) by the Sinus Milieu® social indicator groups (Fig. 6) – amounting in this case to 49 percent. These social indicator groups include opinion leaders, multipliers, selective viewers and innovators. In other words, print has above-average effectiveness for reaching high-status groups.

The example of cars: high involvement
Shares of TV and print in spending and printed advertising

Spending	GRP of print advertising		
Total of 7.5 million euros	Population 18–64 years old Total 1,046	Social indicator groups Total 1,092	Car brand X "maybe" Total 1,102
Print 39% TV 61%	Print 42% TV 58%	Print 49% TV 51%	Print 49% TV 51%

Summer half of 2002; budget: total of 7.5 million euros, thereof 4.6 million euros for TV and 2.9 million euros for print
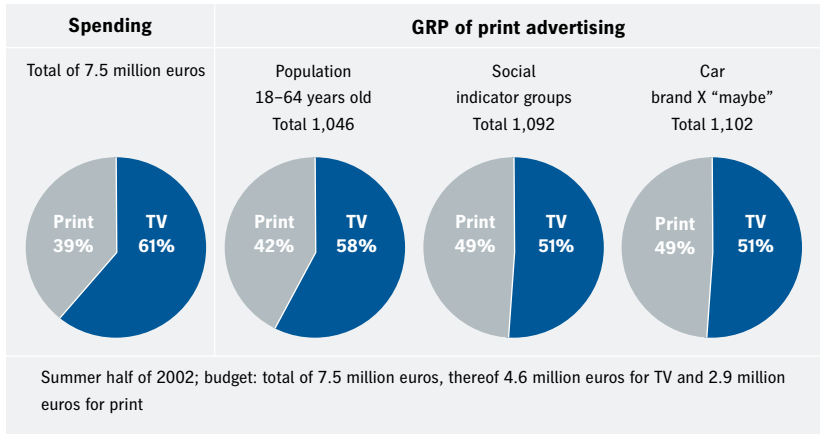
Fig. 9: Media mix planning examples from MarkenProfile 10

This car advertising campaign illustrates that print still reaches a large proportion of high-quality target groups. Or put another way: without print, parts of high-quality target groups would not be reached at all.

The example of cars: high involvement
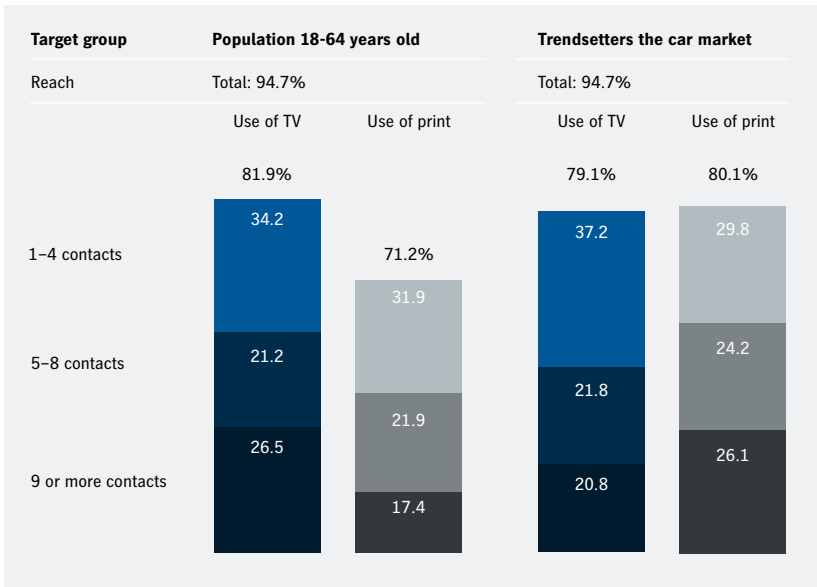Reach in different contact classes, quality target groups

Target group	Population 18-64 years old		Trendsetters the car market	
Reach	Total: 94.7%		Total: 94.7%	
	Use of TV	Use of print	Use of TV	Use of print
	81.9%		79.1%	80.1%
1–4 contacts	34.2	71.2%	37.2	29.8
		31.9		
5–8 contacts	21.2	21.9	21.8	24.2
9 or more contacts	26.5	17.4	20.8	26.1

Fig. 10: Media mix planning examples

In the case of Gillette (body care), it can also be seen how TV and print complement one another for communicating advertising messages – the greatest impact is achieved by deploying both media in a coordinated campaign to make a product known (Fig. 11)). Reminding recipients of advertising messages leads to high acceptance of them. This acceptance is also higher among users of print media (readers of magazine ads) than among TV viewers (watchers of television commercials) (Fig. 12).

The example of body care: changes in product recognition with and without print contact
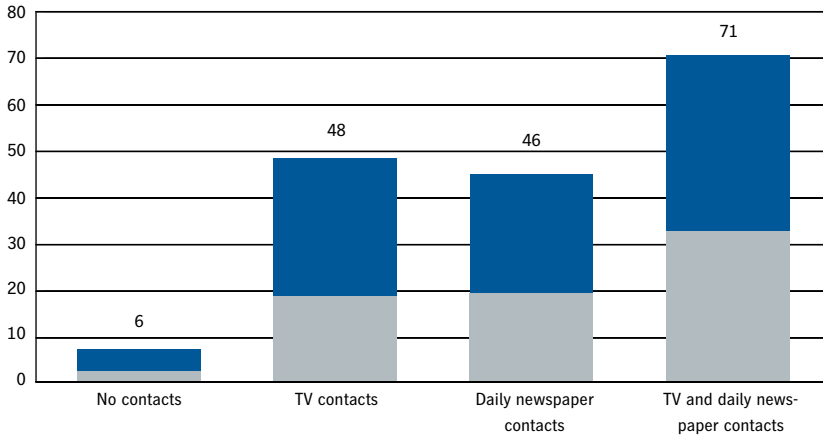
Fig. 11: The example of bodycare: Gillette case study

Acceptance of advertising by consumers

Percentages

Like magazine ads* — 56
Dislike magazine ads — 29
Like TV commercials — 48
Dislike TV commercials — 36
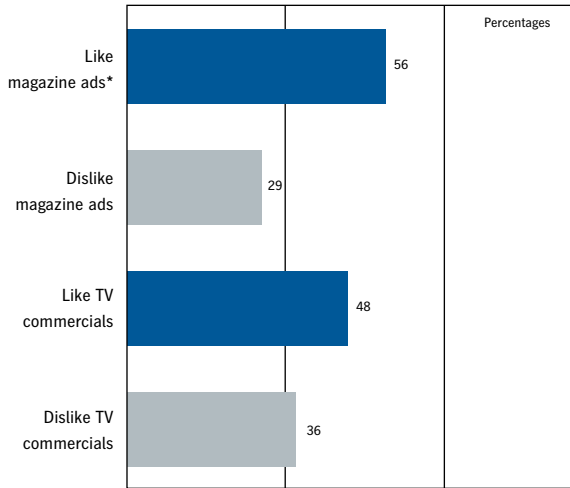
* Types reachable via magazines and TV, figures for 2004

Fig. 12: Acceptance of advertising by consumers (Source: "Die zehn Stärken von Zeitschriften im Media-Mix", January 2005, Bauer Media Akademie)

3.2 MULTIPLIER EFFECT AND EXTENDED REACH · Combined TV/ print ad campaigns create so-called multiplier effects. In other words, a mixture of media confronts recipients more intensively with the content of advertising. The learning effect is greater and the campaign overall more effective. In the case of print, the multiplier effects attract greater attention to the advertising messages. The advertiser benefits from the specific strengths of print: readers' loyalty to certain publications, greater trust on the part of readers and high transfer of credibility to the advertising. Print media also prompt readers to take action. Members of the target groups receive supplementary information that they have missed in television commercials, which frequently receive little attention, or has not been communicated at all via that medium.

There is yet another aspect to consider: combined TV/print campaigns, i.e. with a "mixed strategy", reach target groups much better than single-medium strategies. On moderate budgets, the relative reach of mixed-media strategies is 20 to 30 percent greater than single-medium strategies (Fig. 11). Mixed approaches minimize the number of individuals who are reached too little or too much. The advertising is more effective as a result. This advantage is expressed in the "effective reach", which increases by between 15 and 30 percent compared to TV-only campaigns.

Acceptance of advertising by consumers

Reach gain of 20 to 30 percent
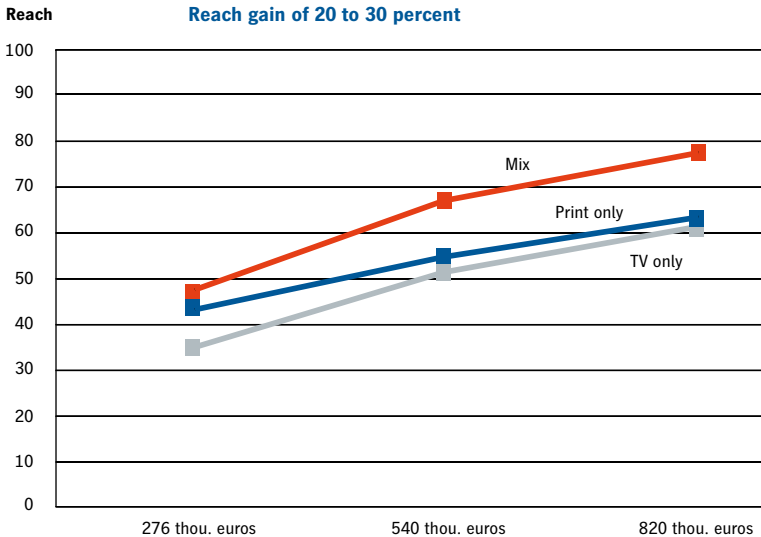
Fig. 13: Media mix strategies - research findings on effective combinations of media

On the whole, a mix of media provides more diverse opportunities for recipients to digest the information than monostrategies. At the same time, it avoids the feared "wear-out effect", which occurs with frequent exposure to the same advertising. Consequently, dividing spending relatively equally between TV and print ensures not only a greater impact, but also a sustained multiplier effect and greater reach.

3.3 DOES A MEDIA MIX ALSO YIELD BENEFITS IN A HIGHLY SUCCESSFUL CAMPAIGN? · The benefits of mixed-media strategies are sometimes ignored when the creative solutions devised for one medium are regarded as especially successful. In many such cases, the advertiser then concentrates the entire budget on that one medium. The hope is that the campaign's creativity will offset the drawbacks of using only one medium. However, this strategy only works if there are enormous differences between the impacts achievable with different media. Only if the contact rate of the second medium is less then 20 percent of that of the first will a monostrategy do better. This is shown by cases in which strategies involving print and TV have been optimized. The reason is that single-medium approaches contact target persons more often than makes economic sense (resulting in contact overkill). Reducing that medium then has relatively minor disadvantages. In such a case, the use of a second medium to reach new target persons will also yield benefits if each individual contact is less effective.

3.4 CONCLUSIONS · When choosing media for marketing and advertising, the different ways in which they work should be considered. Electronic media prompt purchases through fast but relatively unstable attention-getting effects. Brand advertising in print media also promotes sales – more slowly to be sure, but with a longer-term effect and positive benefits for brand loyalty. However, it cannot be said that ads run in print media (e.g., magazines with a wide circulation) generally have a long-term effect and TV commercials a short-term one. Television commercials result in significantly greater recall. That is why one medium can be substituted for the other: they functionally complement one another.

III. The Test: Campaigns in Print, TV and the Internet

1 ORGANIZATION OF THE TEST

The realtime test designed for this study illuminated the impact of three campaigns by the companies of BMW, IBM and Debitel in the media of print, TV and the Internet. It was strictly a laboratory test, leaving variables such as actual relevance, involvement and target group affinity out of account. In all cases, the actual ad or commercial was considered separately from the content of the medium. This ensured objective evaluation.

The test was conducted during the course of one day at Stuttgart Media University. The test subjects for the surveys were 58 randomly selected, highly educated persons between the ages of 19 and 35. The test intentionally focused on this young, educated target group, because the members of this age group not only have money to spend but are also proficient in using all of the media. Also, they are not generally regarded as having a strong affinity for print. Three advertising campaigns in the media of print, TV and the Internet were tested, some of which had just been launched. However, attention was not focused on the campaigns themselves, but rather on the medium or media used.

Fig. 14: BMW: 2/1 ad; Debitel: 1/1 ad; IBM: 1/1 ad

Fig. 15: Screenshots of TV commercial for BMW

Fig. 16: Screenshots of TV commercial for Debitel

Fig. 17: Screenshot of Web banner for IBM

Fig. 18: Screenshot of Web banner for BMW

Fig. 19: Screenshots of Web banner for Debitel
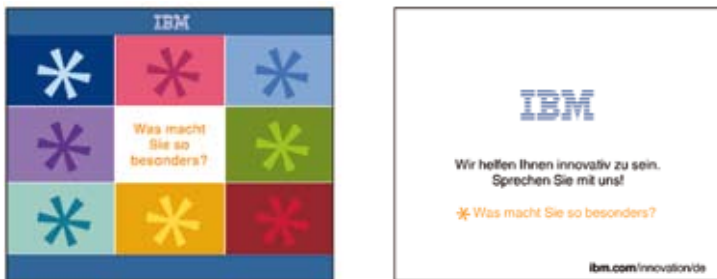
Fig. 20: Screenshots of Web banner for IBM

To avoid contamination between the advertising in different media, it was necessary to ensure that each test subject only came into contact with part of each campaign. The campaigns were therefore divided up into three blocks:

Block A	Block B	Block C
TV: BMW	TV: IBM	TV: Debitel
Print: IBM	Print: Debitel	Print: BMW
Internet: Debitel	Internet: BMW	Internet: IBM

Each test subject was first shown one of the three blocks, then asked in an interview about what they had seen with the aid of an unsupported recall questionnaire. It was important to make sure that roughly the same number of test subjects saw each block. The interviews began with questions about the subject's general media use, then proceeded to ask about the impact of the campaigns in the different media and what the subject recalled. For example, they were requested to say whether they remembered the logo or slogan of each campaign. Open-ended questions were also included, however, such as how the advertising affected them. This made it possible both to collect and compare hard data and to include soft data in the evaluation.

In the following, the findings of the media test are discussed, generally comparing the individual media with one another on the basis of averaged values. A comparison of the media in each campaign then follows.

Fig. 21: Images from the media test at the Stuttgart Media University

2 GENERAL COMPARISON OF MEDIA

The following comparison of print, TV and the Internet as adver-
tising platforms identifies the strengths of each medium on the
basis of text, images, sound and possibilities for interaction.

Impacts and their causes
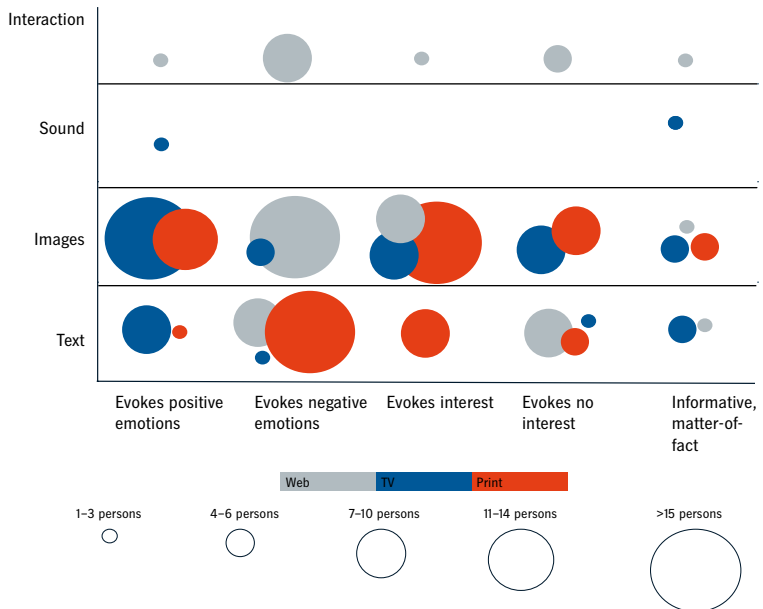
Fig. 22: Chart prepared based on survey findings

Figure 22 shows the connection between the effectiveness of an advertising platform and the reasons for it. It reveals that print is better than any other medium for stimulating interest with pictures. Television mainly uses stationary and moving images to evoke positive emotions. However, this strength of the medium of TV is offset by the fact that the audio component – an alleged advantage – barely increased the effectiveness of advertising in this test.

Neither was it possible to confirm the assumption that users attach especially value to the interactive possibilities offered by the Internet. The possibilities for interacting actually confused the test subjects and evoked more negative than positive emotional responses to the advertising. It was also discovered that print advertising can also provoke negative emotions; in the media test, this was the case with the Debitel and IBM ads, which were heavy on text. The test subjects' responses thus reinforces the well-known necessity of adapting advertising (whether ads, commercials or banners) to the unique characteristics of the selected platform. Otherwise its impact will be nullified.

Concerning brand recall, print and TV tie for first place, considerably ahead of the Internet. Although not only text and images but also sound are used communication on television – a statement that also applies to some extent to the Internet – this does not result in higher recall rates. Background music, speakers with pleasant-sounding voices, and sound logos apparently make little or no contribution to brand recall in the case of TV. This implies that television commercials are not suited for building, positioning or strengthening brands in the ways practiced until now.
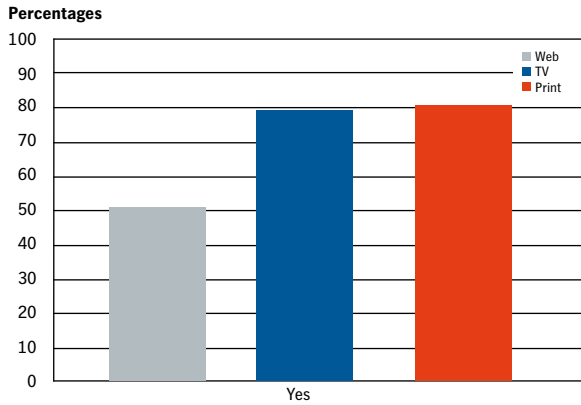
Brand recall (%)

Percentages

Fig. 23: Chart prepared based on survey findings

Where logos are concerned, all three advertising platforms result in nearly identical unsupported recall rates. Print has a slight edge, however, at 84.3 percent.
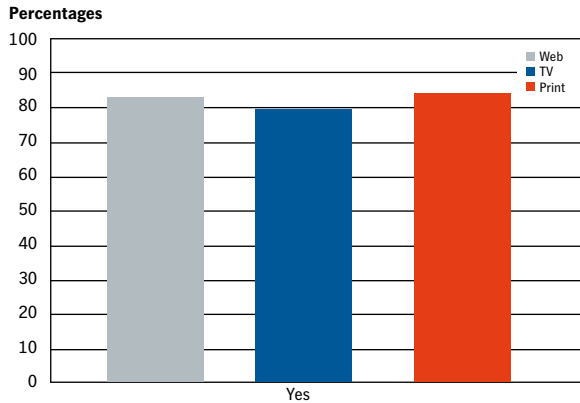
Logo recall (%)

Percentages

Fig. 24: Chart prepared based on survey findings

Regarding slogans, all three media do very poorly in getting people to remember them. This is mainly because it takes high exposure to advertising to anchor a slogan in a consumer's memory. But many of the test subjects were seeing these campaigns for the first time.

Slogan recall (%)

Percentages
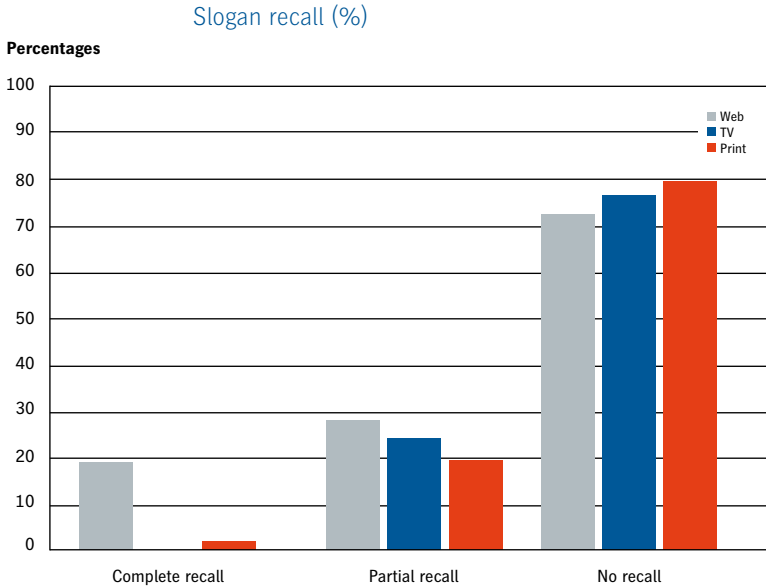
Fig. 25: Chart prepared based on survey findings

When it comes to product recall, print seems to do poorly at first glance. But if the BMW ad is considered, it turns out that many of the test subjects remembered the product as merely a generic BMW and not as a BMW Series 1 model. This makes it clear that involvement plays a major role. A person with low involvement was unable to say which model was being advertised for. In the case of the IBM campaign, by contrast, no specific product was presented. This was purely an image campaign, so by all rights it should not have been possible to remember a product.

But if subjects saw a (long) TV commercial or intensively studied a banner, they concluded that a service was being offered. This is because, due to the long duration of their exposure, they wanted to derive a concrete result.

Product recall (%)

Percentages
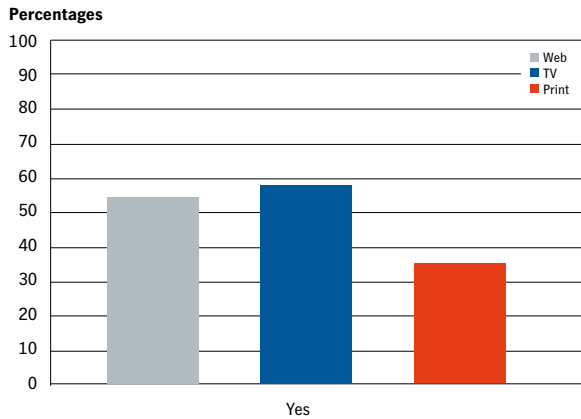
Fig. 26: Chart prepared based on survey findings

3 COMPARISON OF MEDIA IN EACH CAMPAIGN

The preceding comparison of the three media – applying averaged values – yielded general statements about the advertising effectiveness of print, television and the Internet. Now they are compared for the individual campaigns. This serves two purposes. One is to show the basis for the general assessments and explain any exceptions to them.

The other is to identify additional, generally valid strengths and weaknesses of the individual platforms within the context of individual campaigns. The carts show the effectiveness of each medium for the BMW and IBM campaigns. In the case of Debitel, the results were similar to those with the BMW campaign, so there is no need to present them.

3.1 IMPACT · Print is suitable as the platform for advertising the BMW product (Fig. 27). This medium has a positive impact on over 80 percent of the test subjects in the form of interest or positive emotions. The fact that, in this case, print was not regarded as an informative medium may be neglected because this was not the goal of the campaign. The TV commercials by BMW and Debitel both split the test subjects into two camps. In over 30 percent, they stimulated positive emotions, but in an equal number they failed to evoke any interest at all. The Internet does not have an extreme effect in either direction, as was ascertained in the cases of both BMW and Debitel.

Impact of BMW advertising

Percentage
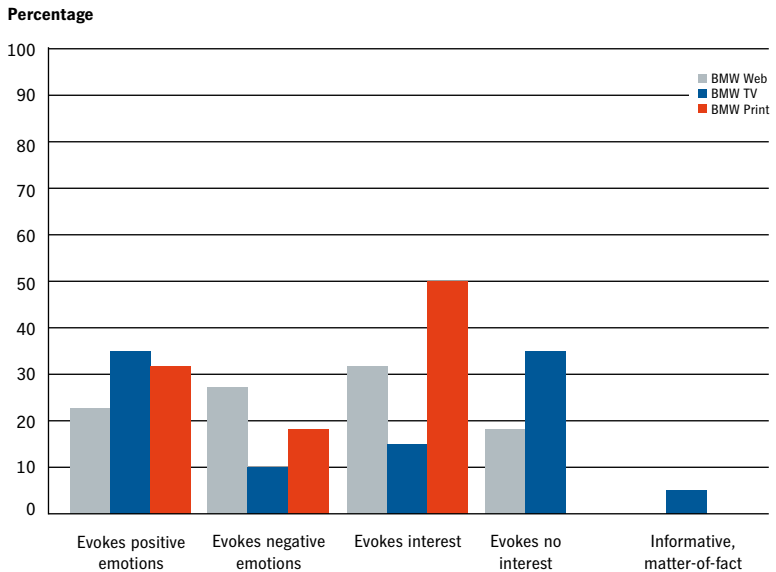
Fig. 27: Chart prepared based on survey findings

The breakdown was different with the IBM campaign. The clear winner was television, followed by the Internet and print. Why was this? IBM took advantage of television's visual and acoustic possibilities for communicating content and reaching consumers.

So the commercial's positive effect was due not only to moving
pictures and text but also to the use of sound (Fig. 30). In con-
trast to BMW, IBM also used interactive tools that took advan-
tage of the possibilities unique to the Internet. In all three media,
BMW concentrated on leveraging the strong impact of pictures
(Fig. 29). This strategy favors print, because while looking at an
ad a reader can concentrate on the most important image ele-
ments without being distracted by other features.

Impact of IBM advertising

Percentage
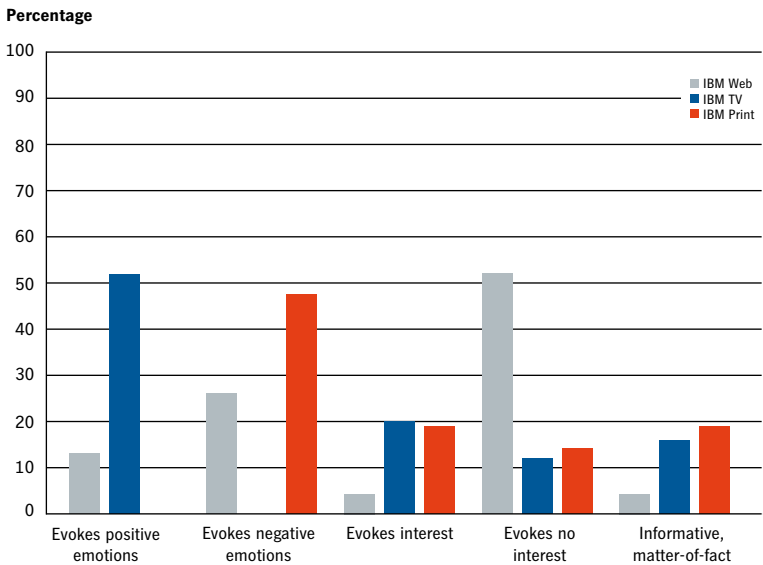
Fig. 28: Chart prepared based on survey findings

Impact of BMW advertising

Percentage
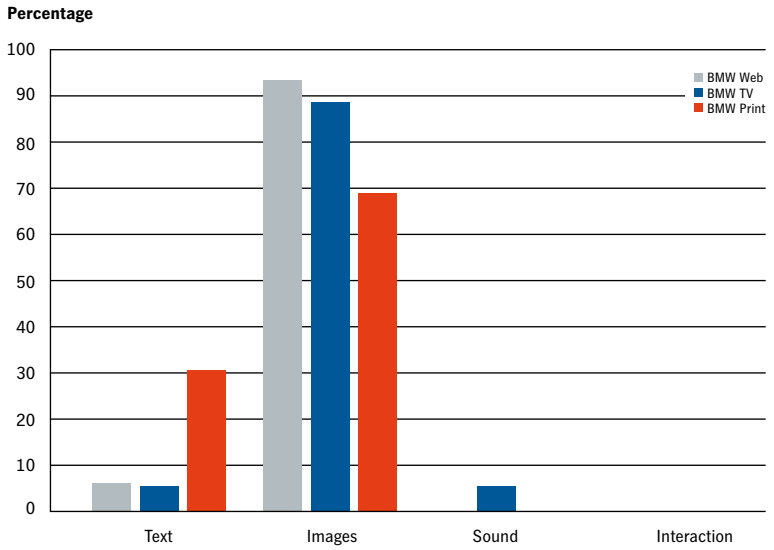
Fig. 29: Chart prepared based on survey findings

Impact of IBM advertising

Why does it have this effect?

Percentage
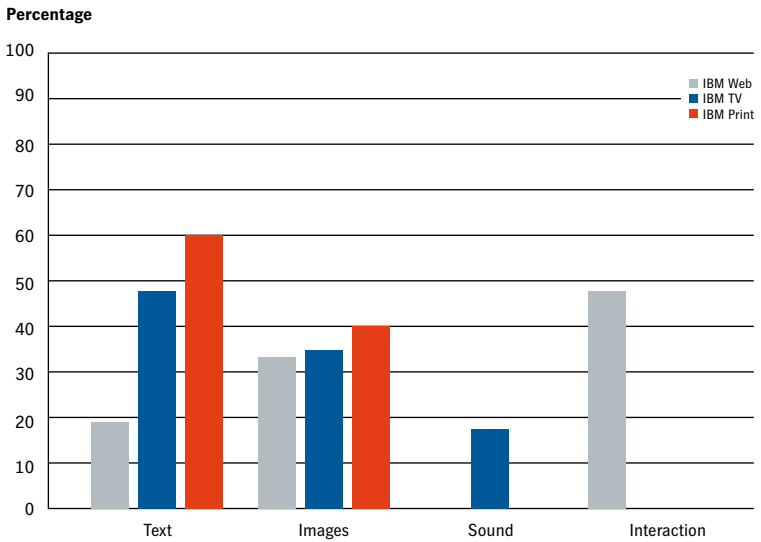
Fig. 30: Chart prepared based on survey findings

3.2 RECALL RATES: BRAND, PRODUCT, SLOGAN, MESSAGE ·
Another important aspect is that of the recall rates generated
by a campaign. For example, brand recall should be quite pro-
nounced, regardless of the medium. As the media test shows,
this is also largely the case.

However, in spite of the generally high brand recall rates, it is conspicuous that the banner of the BMW campaign lags somewhat behind print and TV in terms of effectiveness (Fig. 31). This must be interpreted in light of the fact that in all three media, the logo shown is small and only appears at the edge of the page or at the end of the commercial. This means that, with conditions otherwise being relatively equal, recall of the brand is least with the banner.

In the IBM campaign, print is the least effective medium in relative terms. It should be taken into account, however, that IBM tailors advertising to the medium used. Unlike BMW and Debitel, which use similar image and text elements in all three media, IBM concentrates on taking advantage of the unique characteristics of each medium, taking its respective strengths and weaknesses into consideration. For instance, the imagery used by IBM is quite different in each medium. Different requirements have to met in print, television and the Internet to ensure recognition and recall of the brand. In contrast to the television commercial, in which the brand is shown separately and isolated from the rest of the content at the very end, in the print campaign it appears small and inconspicuous right under the copy.
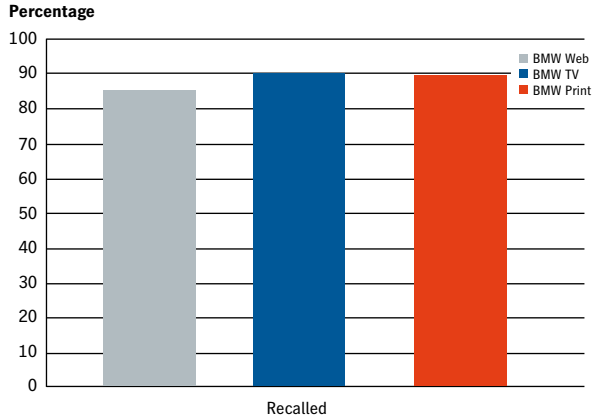
Brand recall in the case of BMW

Percentage

Fig. 31: Chart prepared based on survey findings

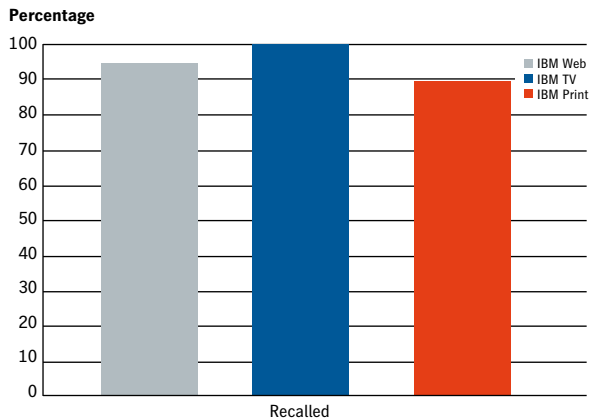## Brand recall in the case of IBM

Percentage

Fig. 32: Chart prepared based on survey findings

The BMW campaign for the Series 1 coupe is the only product advertising included in the test. The advertising from IBM and Debitel is part of image campaigns. This may be one of the reasons why the product recall rate is less than 50 percent for both of these two campaigns. Their image character is clearly expressed by the banner in the case of IBM, and in the case of Debitel by the television commercial (with a recall rate of 53 percent). The medium of print takes second place in both campaigns. In other words, print is also an important contributor to the success of image advertising.

Product recall in the case of BMW

Percentage
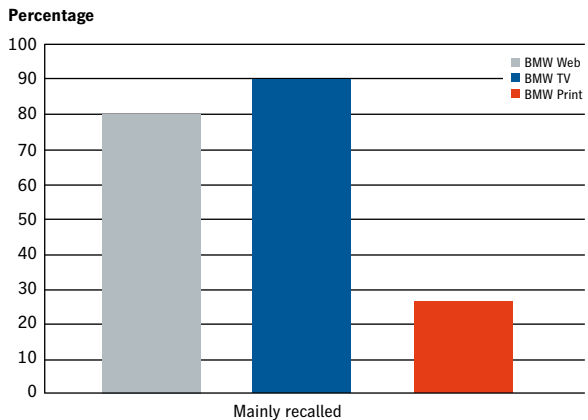
Fig. 33: Chart prepared based on survey findings

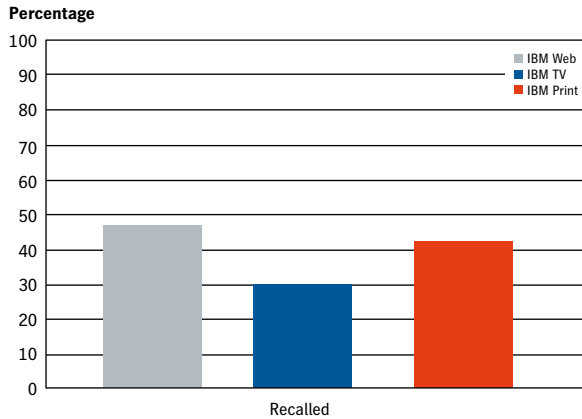## Product recall in the case of IBM

Percentage

Fig. 34: Chart prepared based on survey findings

Like in the campaign-independent comparison of the three media, viewers who pay only brief attention fail to register the slogan. That is why no cross-media slogan recall was identified. Together with the BMW television commercial, however, the IBM banner constitutes an exception: it was recalled at least partially by nearly 50 percent of the test subjects. But this was attributable not to the medium, but to the strategy of tailoring the advertising to the medium: the idea and thus also the content of the banner were based on a text element, namely the slogan. It was heavily integrated in the possibilities the banner offered for users to interact with it, which explains why it was remembered relatively well.
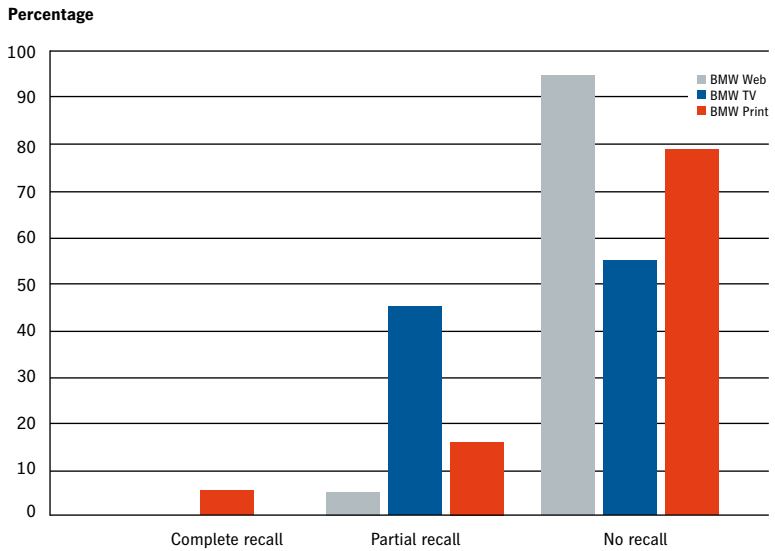
Slogan recall in the case of BMW

Percentage

Fig. 35: Chart prepared based on survey findings

Slogan recall in the case of IBM

Percentage

Complete recall   Partial recall   No recall
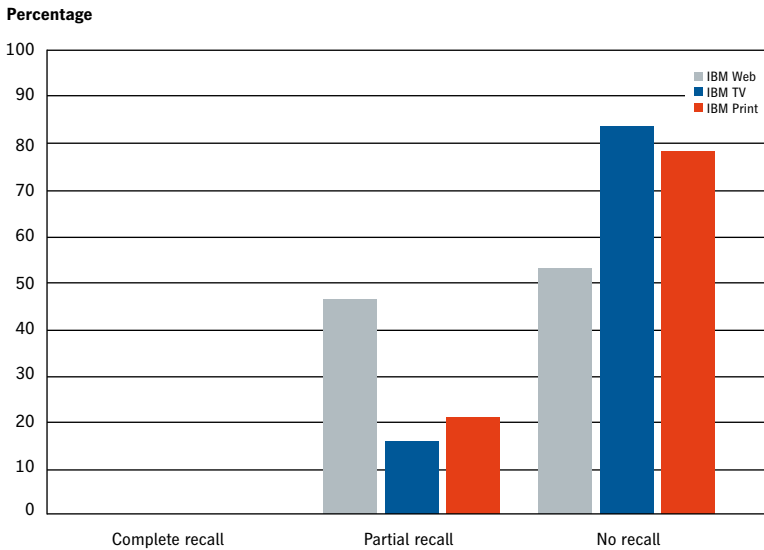
Legend: IBM Web, IBM TV, IBM Print

Fig. 36: Chart prepared based on survey findings

In terms of how well a message is remembered, the Internet is least effective. This medium does not appear suitable for communicating important messages. Television, by contrast, generates recall rates of between 50 and 63 percent, depending on the campaign. This has to do with the fact that television conveys the message both verbally and visually, and it can be repeated several times during the course of a commercial. Print does not permit this. But print performs excellently compared with the Internet, because the message can be reduced to its most essential aspects and clearly conveyed with a minimum of images and text.
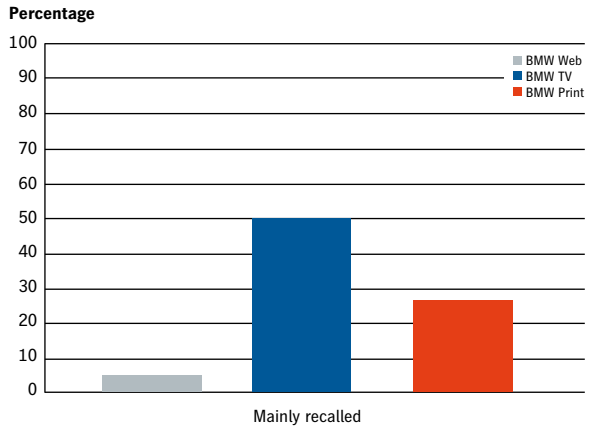
Message recall in the case of BMW

Percentage

Fig. 37: Chart prepared based on survey findings

Message recall in the case of Debitel
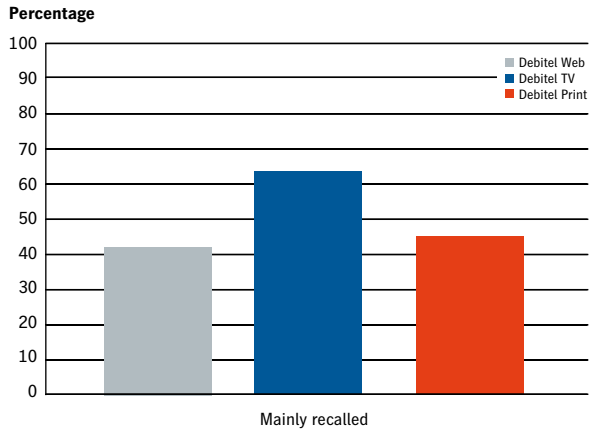
Percentage

Fig. 38: Chart prepared based on survey findings

3.3 CONCLUSIONS · Where the medium of print is concerned, the comparison of all three media for each campaign shows that it offers the following benefits:

- Reduction to the essentials can generate a (positive) effect.
- Print is either informative, emotional or interesting – only rarely does it possess more than one of these attributes at once.
- It is suited for product advertising (simple emotional presentation) without providing more detailed information.
- Print uses images, with their strong impact, as central elements.
- Print does not let other "features" such as sound and inter-activity distract from the essentials, and therefore generates considerable brand recall.
- Print also works for image campaigns. Conversely, the Internet tends to be poorly suited for product advertising (the BMW campaign being a case in point).
- Print can be used in any campaign.
- The slogan is recalled, despite the fact that many of the test subjects were not clear on what exactly the slogan was.

IV. Expert Round Table: the Challenges and Opportunities of Print

For the present study, the effectiveness of print was investigated by reviewing 19 other relevant studies and conducting a campaign test. The findings thus obtained are supplemented below by a summary of what was discussed at an expert round table.

A round table discussion on the topic of "The Future of Print" was held in January 2008 with the following experts representing the printing, advertising, publishing and IT sectors:

- Prof. Dr. Wolfgang Fuchs (Stuttgart Media University)
- Prof. Bernd-Jürgen Matt (Stuttgart Media University)
- Dr. Werner Schumacher (Bechtle Verlag & Druck)
- Reiner X. Sedelmeier (kom-Agentur für Kommunikation und Marketing)
- Peter Waibel (Jung von Matt Neckar)
- Eberhard Wallis (IBM Deutschland GmbH)

The experts agreed that print media will continue to be an integral part of the media mix in the future. Now, in the age of Web 2.0, it is not about declaring war between the media, but rather about taking advantage of new opportunities. The example of eBay shows how Internet providers can boost the demand for print products. This online company not only runs print ads but even publishes its own print medium. Print is utilized as a strategic medium for strengthening users' loyalty to the platform and making it easier for interested parties to begin taking advantage of it.

In the experts' opinion, how users perceive and take in different media is changing. While online media meet the need for fast, direct information, print provides in-depth information as well as sustained visual and tactile impressions. The experts also see print as being best for precisely addressing defined target groups. For example, a manufacturer of high-quality branded products can quickly reach potential customers belonging to the right target group by running an ad in leading business magazines. The experts expressed the view that digital media are mainly suited for communication, and in many cases not at all for advertising. The success of banner advertising has so far been minimal compared to print ads, they stressed.

The experts regarded print and the Internet as partners in advertising and marketing communication. Print media call attention to a product or service, while websites provide more detailed information on it. However, in many cases this symbiosis of print and the Internet can only work well if the printing presses start rolling as close in time as possible to the placement of online ads. This means that printers will have to get used to even tighter deadlines.

The experts had no doubt that the Internet will continue to increase in importance. At the same time, new and improved printing technologies will enable print to set new standards of quality. For example, there is still plenty of room for growth in package printing. There are also other areas in which print has potential. Corporate publishing is registering high growth rates, for example. And more customer magazines are now being printed than commercial general-interest publications. If print succeeds in building a reputation in these areas, it has a good chance of conquering them, according to the experts.

One task, in their opinion, is a perpetual one: the print media industry must communicate the advantages of print better to customers and creatives, for example in connection with the aspects of paper and finishing. In addition, the industry needs to extend its consulting capabilities and respond more sensitively to customer wishes. Both of things are essential prerequisites for consolidating the position of print in the inter-media rivalry. Another important conclusion of the discussion was that although print has acquired a new competitor in the Internet age, it has also demonstrates its strengths. Print must continue to focus on what only it can do – which is a great deal.

V. Recommendations for Action

The findings of this study permit the derivation of three practically relevant recommendations for action by marketing decision-makers, creatives and print buyers – with regard to print's role in communicating both content and advertising messages.

RECOMMENDATION 1: Use print as a text medium – especially when it is necessary to communicate complex messages. This is because print

- informs,
- contextualizes,
- multiplies and reinforces.

RECOMMENDATION 2: Use print as a vehicle for advertising – especially when it is wished to reach target groups with high expectations. This is because print

- has an emotionalizing, activating effect across sociodemo graphic boundaries;
- reaches educated consumers with considerable purchasing power, who still have a strong affinity for print; and
- is credible, so ads have a sustained impact.

RECOMMENDATION 3: Use print in campaigns along with other media to enhance the impact of advertising. This is because print

- has great strengths that compensate for the weaknesses of other media,
- "decelerates" information reception, thus making it more intensive and sustained, and
- supports systematic branding.

VI. Quellen

The present study draws upon the following sources:

- Gillette case study : HORIZONT IV, "PrintPositionen: Auf den Mix kommt es an", 2006.
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- "Zur Zukunft von Print", 2007, TNS Emnid.

Based on findings about how daily newspapers, magazines, product brochures and business reports convey information and advertising messages, this study reveals a great deal about the strengths of printed media — independent of the concrete forms they take and who publishes them. It also shows how and why print yields the best results in combination with TV and the Internet. Overall, the study provides the print media community with valuable insights and arguments. It lets marketing decision-makers, creatives and print buyers deploy print products even more successfully to achieve specific aims.

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