

# DRIVING BRAND ENHANCEMENT

CUTTING EDGE RESEARCH ILLUSTRATING HOW AND WHY INTERNATIONAL  
PRINT MEDIA ENHANCES ADVERTISING BRAND COMMUNICATIONS

## Executive Summary - 2007



## 1.0 INTRODUCTION

The World Press Group (WPG) commissioned ICD Research to undertake exploratory research investigating the following hypotheses’:

- Whether consumers have the same attitudes towards international and national titles
- Whether advertising was enhanced to different degrees within international and national titles
- Whether perceptions of advertising within international and national publications varied
- Whether specific brand associations differ within international and national titles

ICD Research conducted a mixed methodology approach which used the online qualitative research to test the hypotheses’ and shape the design of the quantitative, which consisted of an online survey of both subscribers to the 8 international titles across 6 countries and non international readers from the global network of panel partners commissioned by ICD Research.

Analysis addressed the hypotheses as well as using statistical methods to determine an enhancement factor comparing advertising within both international and non international titles.

For the purposes of analysis, each country contributed the same weight and each international and non international title was assumed to be of equal weight/importance within the research to report on the group of titles, rather than the enhancement factor of individual titles.

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## 2.0 QUALITATIVE RESEARCH FINDINGS

### 2.1 Approach

The qualitative research was exploratory in nature and designed to help shape the quantitative research rather than be used in isolation. Amongst other objectives, key to the qualitative groups was the exploration around the word 'enhancement' to determine how respondents perceive the *phrase 'a product/service is enhanced when it is advertised in [title name].'*

### 2.2 Results

With matched samples of international and non international readers, perceptual and attitudinal differences emerged. Their reasons for reading, their awareness of offering, the language they use and their response to advertising messaging and stimulus is significantly different.

#### 2.2.1 International Readers

International titles provide readers with more than 'international' reporting.

- It is analysis, combined with fact
- It is in-depth reporting and not constricted to breaking news
- It is less biased
- It is trustworthy
- It is reputable

International titles were not read in isolation. International readers often read more than one title, in conjunction with national titles, to get a balanced and global perspective on news.

*"National is for day to day news, international for more analysis and different perspective on things you might have read somewhere else" - France – International*

*Moderator: "National titles will often have a political agenda"*

*Respondent B: "They are not always unbiased"*

*Respondent C: "The thing that disappoints about the UK press is its a bit too much gossip and not enough perspective"*

*Respondent A: "Based on reading 'the title', I would say it has a policy agenda rather than political"*

*Respondent B: "I find that national titles have quite a political agenda, international titles perhaps seem to have more of an agenda of ethics" - UK – Internationals ONLINE FOCUS GROUP*

#### 2.2.2 Non-International Readers

Those who read only national titles were quite varied in their opinions on print media. Many had little to no experience of international publications at all but still had perceptions. Others were familiar with international titles but were not engaged or had infrequent readership of these publications. The advertising within these titles often reflected the perceptions that were held of the title overall.

*"For me, an international newspaper is a newspaper which is often in English but they also often offer a different, not a German, perspective*

*and therefore include different aspects as well as imply cultural differences" German – National*

*"I think there is an assumption a certain type of person will read a certain type of newspaper" - UK - National*

## 2.3 Views on Advertising

It was understood that advertising is a requirement for all publications but used to maintain the content contained within national and international titles. Advertising was remembered when relevant to the reader, although the recognition of its purpose and cut through is more evident with international readers.

*"Surely the more adverts (within reason) the more money to spend on editorial budgets etc" UK – International*

Tangible products are more associated with national titles, whereas the perception exists that advertisers are more likely to use international press to convey corporate policies and corporate branding. However, the perception was held that certain advertisers would advertise in both types of titles, although the messaging in both would be different.

*"Most ads in the internationals do not try and sell you something but want you to remember their brand" France – International*

International recognition gained through advertising was seen to increase the prestige of the brand. International titles were seen to be successful given their multinational status and it is this image of success which is echoed in the advertisements by global companies. In all, a successful title would only display advertising from successful organisations.

*A: "It gives the whole campaign an added sense of trustworthiness"*

*B: "I think she meant reinforced. The credibility of the product was enhanced"*

*Germany – International*

*A: "Brands who advertise internationally are already established, so it's a case of reminding the audience and occasionally pushing a new product"*

*B: "Brand awareness vs. sales & market share"*

*A: "Think global, act local, says the marketing guy"*

*France – International*

Advertising in the internationals was deemed as 'better' given the size and importance of audience that the brand reaches. Greater recognition of advertising in international titles was also important to note.

*"The global factor is important and global brand awareness also. We still remember the product brand and name, even unconsciously" France – International*

*"In an increasingly global world, international appeal and recognition will be the defining success factor" UK- International*

### 3.0 QUANTITATIVE RESEARCH FINDINGS

With robust and matched demographic samples, the quantitative research allowed analysis to measure perceptions and opinions overall, and within sub-segments. Through careful analysis, an 'elite' segment was identified and defined by their superior job title and current income.

#### 3.1 Perceptions

- To understand whether differences existed within titles or 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

*"[INTERNATIONAL TITLES] remain for the most part impartial and give you the facts, leaving you to make up your own mind"*

Amongst the elite segment, the variance between international and non international titles becomes more pronounced.

**FIG 1. ATTITUDES**

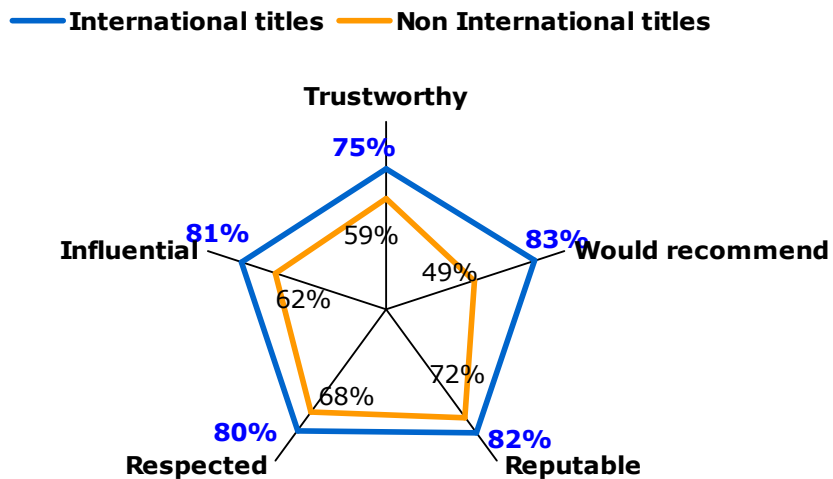
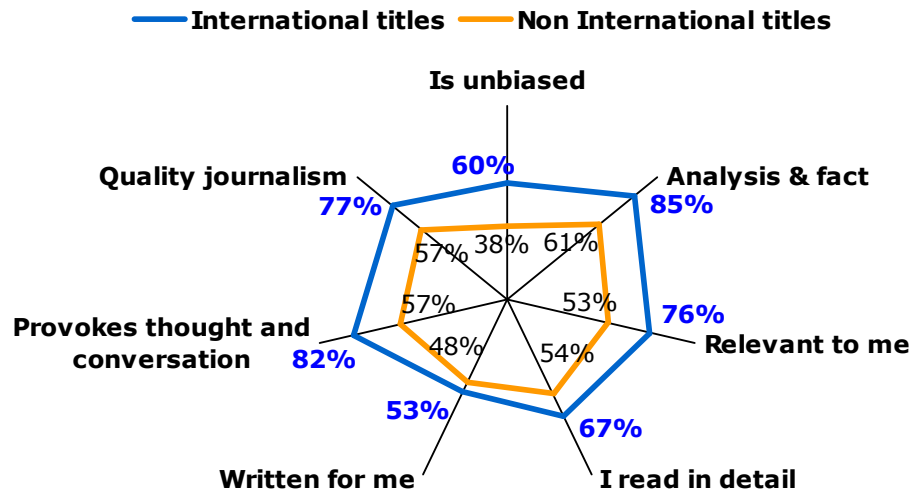


FIG 2. RECOGNITION OF EDITORIAL QUALITY



### 3.2 Advertising Awareness

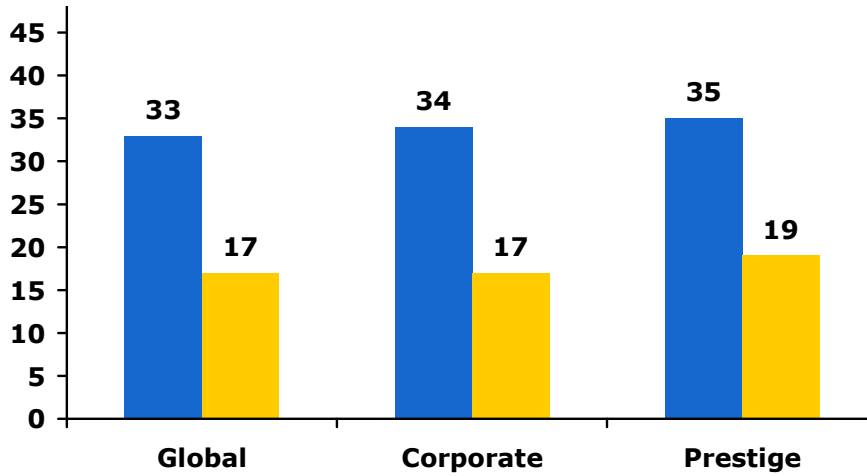
International and non international readers were asked their agreement with a series of attitude statements relating to both types of titles, as well as the advertising contained within.

Key findings included:

- Perceptions of corporate, global and prestige advertising contained within international titles; and *seen* as relevant to the audience [international readers] and *perceived* to be relevant [non international readers]
- There was strong agreement that the reputation of the advertisers complements the reputation of the international title
- As identified in the qualitative, the consistency and longevity of advertisers and advertising messaging is stronger within international titles than non international titles

FIG 3. DRIVERS OF RELEVENCE (% Rating 8 or 9 within 9 point scale)

■ International Titles ■ Non International Titles



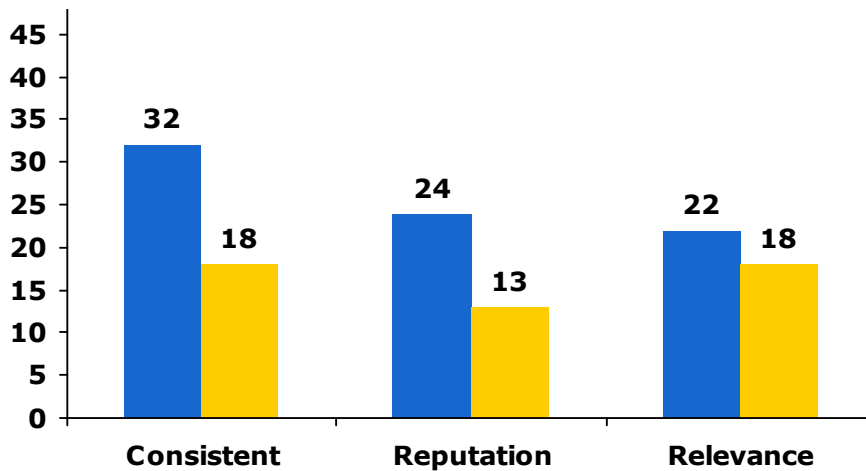
### 3.3 Key Driver Analysis

Contributing factors and attributes identified within the qualitative research were quantified with the differences between international and non international readers explored.

Key results are listed below

FIG 4. Key Enhancement Drivers (% Rating 8 or 9 within 9 point scale)

■ International Titles ■ Non International Titles





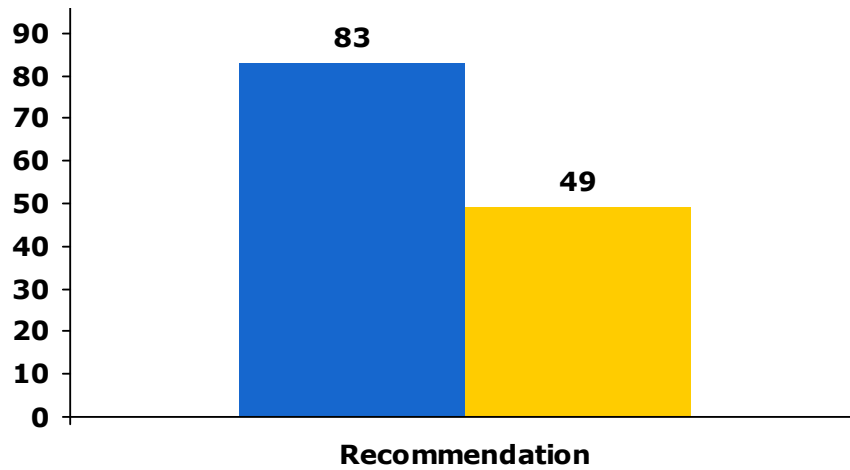
**TABLE 1. Key Enhancement Drivers: Summary of Ratings**

	INTERNATIONALS			NON INTERNATIONALS		
	Rated 1-4	Rated 5-7	Rated 8-9	Rated 1-4	Rated 5-7	Rated 8-9
Reputation	33%	43%	24%	42%	45%	13%
Consistency	21%	48%	32%	34%	48%	18%
Relevance	25%	54%	22%	32%	50%	18%

**FIG 5. Recommendation as part of Key Enhancement Driver for Non International titles**

*The recommendation metric measures willingness to recommend the international or national title overall, rather than the rating scale used for the other key drivers*

■ International Titles ■ Non International Titles



### 3.4 Enhancement

The overall research objective of DBE centred on 'enhancement' with the following hypothesis' requiring confirmation/validation

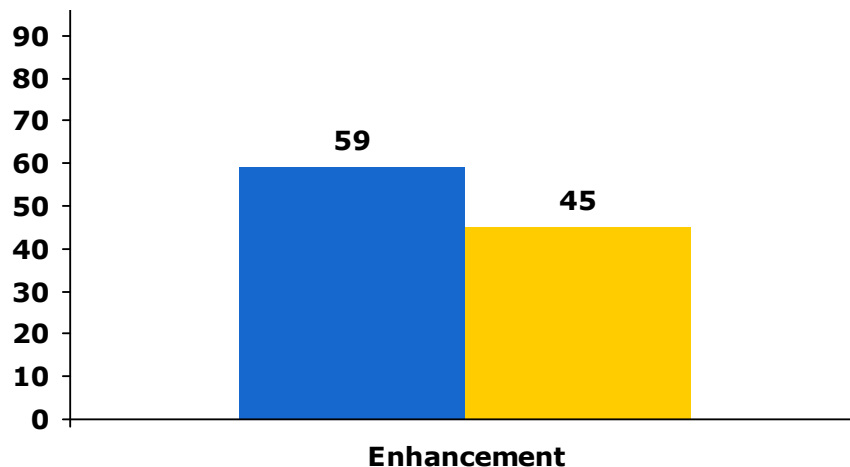
- Whether consumers have the same attitudes towards international and national titles.
- Whether advertising was enhanced to different degrees within international and national titles.
- Whether perceptions of advertising within international and national publications varied.
- Whether specific brand associations differ within international and national titles.

As each hypothesis was believed to be a contributor to overall enhancement, ICD Research were commissioned to identify the key drivers to advertising being enhanced within international and non international titles, as well as the overall enhancement difference.

The difference between advertising being enhanced within an international title and non international title is shown below

**FIG 6. Enhancement of advertising within International and Non International titles**

■ International Titles ■ Non International Titles



## 3.5 Sector Enhancement

The matched samples were asked their opinions on where specific sector advertising would be enhanced. The below definition of enhancement was provided based on the qualitative research

***"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"***

A rating was required for each sector listed below, 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)

Overall, all readers believe that categories such as airlines, investment banking, luxury watches and hotels will be enhanced by advertising in international titles, with the difference and pre-disposition towards international titles more pronounced as documented in the following tables.

**TABLE 3: Sector Enhancement in International and Non International Titles**

		<b>Total Internationals</b>	<b>Elite Internationals</b>	<b>Total Non-Internationals</b>	<b>Elite Non-Internationals</b>
<b>Automobiles (e.g. Toyota, BMW, Honda)</b>	International Titles	88%	82%	72%	87%
	Non International Titles	68%	57%	91%	89%
<b>Investment Banking (e.g. Merrill Lynch)</b>	International Titles	98%	97%	87%	93%
	Non International Titles	49%	36%	87%	85%
<b>Gas/Petrol/Energy (e.g. Chevron, Shell)</b>	International Titles	93%	90%	77%	72%
	Non International Titles	50%	43%	83%	79%
<b>Delivery &amp; Courier Services (e.g. Fed Ex, UPS)</b>	International Titles	93%	88%	73%	79%
	Non International Titles	53%	48%	86%	85%
<b>Credit Card Providers (e.g. VISA, American Express)</b>	International Titles	92%	89%	83%	87%
	Non International Titles	62%	55%	86%	83%
<b>Mobile Phones (e.g. Nokia, Samsung)</b>	International Titles	87%	85%	71%	76%
	Non International Titles	62%	48%	90%	88%
<b>Luxury Watches (e.g. Rolex, Tag Heuer)</b>	International Titles	95%	95%	81%	89%
	Non International Titles	52%	46%	82%	82%
<b>Hotels (e.g. Four Seasons Hotels, Mandarin Oriental Hotels)</b>	International Titles	97%	100%	81%	89%
	Non International Titles	56%	44%	81%	76%
<b>Airlines (e.g. Singapore Airlines, Lufthansa)</b>	International Titles	98%	99%	85%	87%
	Non International Titles	55%	44%	83%	76%
<b>Banks (e.g. HSBC, ABN AMRO, CitiBank)</b>	International Titles	94%	95%	82%	85%
	Non International Titles	61%	54%	84%	71%
<b>Software (Microsoft, Oracle, SAP)</b>	International Titles	83%	68%	71%	88%
	Non International Titles	61%	65%	82%	73%

### 3.6 Company/Brand Enhancement

A number of advertisers were presented to all respondents in order for them to evaluate the medium that they believe would be appropriate to advertise within.

**TABLE 4. Brands covered within DBE**

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

Brands were also tested specifically at a national level to alleviate any biases towards international brands in the testing process. These brands were:

**TABLE 5. Country specific brands covered within DBE**

<b>UK ONLY</b>	<b>FRANCE ONLY</b>	<b>GERMANY ONLY</b>	<b>ITALY ONLY</b>	<b>SPAIN ONLY</b>	<b>SWITZERLAND ONLY</b>
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

The majority of the brands presented were deemed by all respondents to be more appropriate to be advertised within international titles with differences emerging when segmenting the overall sample, as documented in the following table.

The questionnaire was designed to allow the readers their own interpretation relating to the brands after the qualitative research uncovered an awareness of multiple brand advertising strategies, e.g. Shell was perceived to target consumers and business readers with different messaging strategies.

**TABLE 6. Appropriateness of advertising in International titles by brand**

RATED INTERNATIONAL	Total Internationals	Elite Internationals	Total Non-Internationals	Elite Non-Internationals
ABN AMRO	61%	57%	55%	49%
British Airways	64%	63%	56%	54%
BMW	53%	52%	29%	25%
BP	61%	68%	45%	56%
Canon	51%	62%	35%	36%
Credit Suisse	60%	64%	61%	69%
Four Seasons	79%	92%	63%	77%
Honda	40%	41%	17%	9%
HSBC	64%	68%	51%	29%
Kodak	60%	70%	41%	59%
LG	38%	52%	24%	30%
Mandarin Oriental	74%	82%	64%	72%
Merrill Lynch	78%	85%	59%	57%
Microsoft	57%	75%	44%	50%
Motorola	42%	42%	27%	29%
Nokia	46%	61%	20%	20%
Rolex	76%	83%	56%	45%
Samsung	35%	35%	27%	44%
Shell	63%	81%	46%	51%
Singapore Airlines	81%	91%	63%	54%
Tag Heuer	76%	77%	60%	56%
Toshiba	52%	52%	27%	20%
Toyota	38%	42%	23%	31%
UBS	74%	75%	56%	47%

### 3.7 SUPPORTING VERBATIM

To support the quantitative component of the research design, open ended comments were recorded to understand the rationale behind reader views and opinions.

*"Green issues. I believe that the kind of people who read this magazine (e.g. me) are increasingly concerned with environmental matters and, therefore, if these energy companies can link their message to the environment, they stand a high chance of connecting with that reader"*

**UK International Reader explaining why gas/petrol/energy advertising is enhanced within international titles.**

*"It might be possible that the consumer would link an economic behaviour regarding the always-rising energy prices with 'the title'. It would be appropriate if these companies made some ads for the customers to gain more understanding and a better orientation."*

**German Non International Reader explaining why gas/petrol/energy advertising is enhanced within international titles.**

*"I would assume that 'the title' readers would be spread across the globe, they would travel a lot on business and therefore would be interested in hotels."*

**UK International Reader explaining why hotel advertising is enhanced within international titles.**

*"Widespread circulation of the publication in different countries, high visibility for hospitality facilities like hotels"*

**Italian Non-International Reader explaining why hotel advertising is enhanced within international titles.**

*"I usually read some these titles on the plane, and I decide which airline to select. The target/media match is therefore correct"*

**Italian International Reader explaining why airline advertising is enhanced within international titles.**

*"The average reader 'the title' is more of an airline traveller as the common population and more interested in this kind of information"*

**German Non International Reader explaining why airline advertising is enhanced within international titles.**

*"They are less of a regular purchase like a car (even an expensive one) and the companies simply need to maintain the brand."*

**UK International Reader explaining why luxury watch advertising is enhanced within international titles.**

*"I think it is a medium which people of a standard which can allow certain luxuries usually read"*

**Spanish Non International Reader explaining why luxury watch advertising is enhanced within international titles.**

*"The title' is read by a wide category of travellers on the higher level of buying capacity. Such an advertisement may bring to their attention a certain auto brand; 'the title' has credibility, hence people may rely on the advertisements made in 'the title'."*

**Swiss International Reader explaining why automobile advertising is enhanced within international titles**

"This is an important publication therefore an automobile that aspires to have a certain weight on the market must also rely on certain vehicles not to compromise its own image"

**Italian Non International reader explaining why automobile advertising is enhanced within international titles.**

"People who read this international title are likely high(er) income managers who would be more likely to use Private Banking"

**French International Reader explaining why investment banking advertising is enhanced within international titles.**

"Because I think the target at which 'the title' is directed includes investors at which investment and private management banks should aim their advertising in this type of magazine."

**Spanish Non International Reader explaining why investment banking advertising is enhanced within international titles.**

"It means that depending on the culture, you can interpret the same thing differently, but since HSBC has a thorough local knowledge, they know how to adapt [to] meet the needs of anyone."

**French International Reader explaining why private banking advertising is enhanced within international titles.**

"These are banks with an international profile and great prestige which would benefit from being advertised in a highly prestigious publication such as the one cited."

**Spanish Non International Reader explaining why private banking advertising is enhanced within international titles.**

"The information delivered by the title is accurate, professional. People that read the newspaper seek information that can be trusted. That's a reason for FedEx, UPS: They have chosen a newspaper that can be trusted"

**Spanish International Reader explaining why delivery and courier services advertising is enhanced within international titles.**

"Because it is an international publication, I believe one of the most widely sold and thus the advertising of couriers is necessary to establish one's name worldwide, a quick way to receive goods of every kind, even envelopes."

**Italian Non International Reader explaining why delivery and courier services advertising is enhanced within international titles.**

"Software is the mesentery that holds the guts of economies together. Of course those interested in the subject contained within the title need to know about an unseen but essential part of the economy"

**French International Reader explaining why software/computing services advertising is enhanced within international titles.**

"The title' is an international magazine and software has the same trait"

**German Non International Reader explaining why software/computing services advertising is enhanced within international titles.**

"The title' is most likely read by the higher income group & advertising a Credit Card in the magazine will enhance the readers choice of card."

**French International Reader explaining why credit card provider advertising is enhanced within international titles.**



*"Readers of these newspapers are more involved in financial things and therefore paying by credit card is more common for them"*

**Swiss Non International Reader explaining why credit card provider advertising is enhanced within international titles.**

*"I think mobile phones are desired by readers from a very wide range of publications. 'the title' represents an affluent readership which to whom I expect high end phones with office functionality would appeal."*

**UK International Reader explaining why mobile phone advertising is enhanced within international titles.**

*"Because mobile phones are used by all categories of people worldwide. In addition to being read worldwide, 'the title' isn't specific for a certain category."*

**Italian Non International Reader explaining why mobile phone advertising is enhanced within international titles.**

## 4.0 TECHNICAL APPENDIX

### Methodology

2,114 interviews were conducted over a four week period from 6 countries namely:

- United Kingdom
- France
- Germany
- Italy
- Spain
- Switzerland

Sample was provided from all World Press Group stakeholders as well as ICD Research's global panel.

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

Both groups however are not mutually exclusive as very few would readers would only read international or national titles exclusively.

- International readers were required to have read 4 out of 4 issues of one or more of any of the 8 World Press Group titles. They were allowed to be readers of non-international titles.
- Non-International readers were to have read 4 out of 4 issues of local publications as set out by the stakeholders. They were however not to have read any more than 3 out of 4 issues of any of the 8 World Press Group titles

Weighting of data was undertaken with each country representing an even number of interviews. Each title was assumed to be equal and results are presented at an aggregate level.

Data collected from each respondent were:

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

The following tables display the demographic profiles of respondents collected within the survey.

**TABLE 7. Age group profile**

	<b>International</b>	<b>Non International</b>
18-24	3%	2%
25-29	8%	9%
30-34	15%	18%
35-39	17%	15%
40-44	15%	16%
45-49	13%	15%
50-54	11%	11%
55-59	9%	7%
60-64	5%	4%
64+	3%	1%

**TABLE 8. Gender profile**

	<b>International</b>	<b>Non International</b>
Male	73%	79%
Female	27%	21%

**TABLE 9. Marital Status profile**

	<b>International</b>	<b>Non International</b>
Single	23%	18%
Living with a partner, but not married	15%	19%
Married	55%	57%
Separated/divorced /widowed	7%	6%

**TABLE 10. Job Title Profile**

	<b>International</b>	<b>Non International</b>		<b>International</b>	<b>Non International</b>
Owner	8%	9%	Consultant	7%	7%
Partner	3%	2%	Other Senior Director	4%	3%
Chair	3%	3%	Manager	9%	7%
President	2%	0%	Senior Government Official	2%	1%
CEO	3%	1%	Professional, e.g. Doctor, Dentist	5%	5%
Managing Director	5%	2%	Legal Professional, e.g. Solicitor	2%	3%
Vice President	1%	0%	IT Professional, e.g. Data Communications	4%	7%
General Manager	3%	2%	Other Professionals, e.g. Teacher, Nurse	6%	8%
CFO	2%	1%	Clerical	3%	11%
Finance/ Finance Director	3%	1%	Academic	4%	4%
Treasurer	1%	0%	Other	8%	8%
Department Head	11%	13%			

**TABLE 11. Main business activity profile**

	<b>International</b>	<b>Non International</b>		<b>International</b>	<b>Non International</b>
Utilities/Mining/ Quarrying	3%	3%	Banking	8%	8%
Oil/Plastics/ Chemicals/ Pharmaceuticals	6%	3%	Other Financial Services	9%	4%
Manufacture of Metals	1%	1%	Software/Computer Services	5%	3%
IT/Computing Equipment	6%	6%	Telecommunications Services	2%	3%
Telecommunicatio ns Equipment	2%	1%	Advertising/Marketing Services/PR	3%	2%
Other Electronic/ Electrical Engineering	2%	2%	Printing/Publishing/ Broadcasting	2%	2%
Construction/Civil Engineering/ Building Materials	2%	6%	R&D/Scientific/ Technical Services	4%	2%
Vehicles/Transport Equipment	1%	2%	Freight/Logistics/ Storage/Postal Services	1%	1%
Other Mechanical Engineering	1%	1%	Import/Export/Wholes ale/Retail	2%	3%
Food/Drink/ Tobacco	1%	3%	Travel/Tourism/ Leisure Services	1%	3%
Textiles/Clothing	1%	1%	Healthcare/Educational Services	11%	11%
Other Manufacturing	1%	3%	Other Services	9%	14%
Insurance	2%	3%	Other (please specify)	14%	10%

**TABLE 12: Copies of titles included in DBE**

<b>INTERNATIONAL</b>	<b>UK</b>	<b>FRANCE</b>	<b>GERMANY</b>	<b>SPAIN</b>	<b>ITALY</b>	<b>SWITZERLAND</b>
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