print in the mix

A clearinghouse of research on print media effectiveness

SPRING/SUMMER 2012

Did You Know...

In the 1970s, there were eight media platforms advertisers and agencies had to research, plan, buy, and analyze the effects of when mounting a campaign. **Today there are more than 100 choices –** 17 from mobile alone. *(PQMedia, 2012)*

There are **nearly 187 million magazine reading adults in the U.S. and 46% of them are interacting with their favorite magazines exclusively in print, a survey finds**. When asked why they are not currently reading magazine content digitally, the majority (54%) say they "just prefer reading printed copies of magazines," and 44% claim "no interest in reading their magazines in a digital format." *(Affinity American Magazine Study, Fall 2011)*

Nearly six out of 10 (58%) consumers **feel social media marketing is invasive**. In addition, **two-thirds (64%) say they "hate" when a company targets them with marketing messages through their social networking profile**. *(Insight Strategy Group, 2012)*

A survey of the top 100 U.S. magazines (by circulation) finds the total number of **QR and other action codes in magazines grew 439% in 2011**. Ninety-seven percent of action codes in Q4 were either QR codes (72%) or Microsoft Tags (25%). Digital watermarks (embedded digital info imperceptible to the human eye) just entered the top 100 in December 2011. Their use is expected to rise in 2012. *(Nellymoser QR Code and Tag Study, 2012)*

An examination of the top 200 U.S. advertisers' digital ad campaigns finds **31% of online display ads go unseen** due to users scrolling by them before they load or the ad running on a part of the web page never viewed. In addition, **72% of campaigns ads are inadvertently displayed next to content deemed 'not brand safe'** by the advertiser. *(comScore, 2012)*

According to the Direct Marketing Association, **52.4% of U.S. consumers say they read the direct mail** sent to them from retailers and **53% find this direct mail "useful."** *(DMA 2011 Statistical Fact Book)*

Make sure to check out other findings at *Print in the Mix*

Traditional Ad Channels Most Engaging

Data from the *2012 American Shopper Study,* a BrandSpark and Better Homes and Gardens initiative, shows **traditional advertising channels outperform digital channels in engaging the American consumer.**

Key findings:

- Among users of traditional media, 97% say they "always" or "sometimes" notice TV ads, followed by magazine ads (86%) and direct mail (82%).
- When it comes to digital media, 71% of Internet users say they "always" or "sometimes" notice search engine ads and 66% say they notice ads appearing on social media platforms. One-third of respondents say they never notice social media ads.

How Often Ads Are Noticed, by Media

Media	Always	Sometimes	Never
TV	57%	40%	4%
Magazines	30%	56%	14%
Internet	25%	58%	17%
Direct mail	24%	59%	18%
Outdoor ads	18%	62%	19%
Radio	21%	58%	21%
Paid daily newspapers	21%	53%	26%
Search engines	18%	53%	29%
Social networks	18%	48%	34%
Free daily newspapers	18%	48%	34%
Blogs/Online editorials	12%	43%	46%

- The study also finds women are more likely than men to notice ads, most often in traditional media. The largest discrepancy is in magazines, with 88% of women saying they notice the ads, compared to 80% of men.
- Younger shoppers (18-24) are far more likely than those 65 and older to notice online ads, such as Internet ads (91% vs. 69%) and ads featured on search engine (76% vs. 52%).

About: BrandSpark International, in collaboration with SSI, conducted this online survey of over 60,000 American consumers (age 18+) in November-December, 2011. The survey was weighted by gender, age, and region to conform to U.S. MRI data and reflect the principal shopper.

Source: Marketing Charts, TV and Magazine Ads Get Most Attention, February 9, 2012.

Social Media: A Marketing Priority, Yet Not a Revenue Generator

An Econsultancy/Adobe survey of 600 global marketers finds while **social media engagement leads the list of "most exciting digital opportunities" for 2012, its effectiveness as a revenue generating channel is in question.**

Key findings:

- When asked which **digital marketing opportunities** had them most excited, 54% of respondents say **social media engagement is top of mind**. The next closest response: mobile optimization at 38%.
- Queried about upcoming **digital marketing priorities, social media also leads the pack**, chosen by 39% of respondents as their lead focus.
- Yet while social media marketing is said by many to be intriguing and a 2012 priority, **almost half (48%) of company and agency respondents say, "social media has added many more programs and goals, but not the revenue to support new hires."** Just 20% of companies and 13% of agencies say this is not an issue for them.

About: The results are based on an online survey of more than 600 client-side and agency respondents, 27% based in North America and about two-thirds based in Europe; 42% are exclusively focused on B2C, 32% are B2B-focused, and 26% are focused on both B2B and B2C.

Source: Marketing Charts, Social Media Excites Marketers, but Doesn't Yet Generate Revenue, February 14, 2012.

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"We Prefer Direct Mail," Say Consumers

According to marketing firm Epsilon Targeting's *Consumer Channel Preference Study*, **direct mail continues to deliver as consumers' preferred means of receiving marketing messages from brands**. Key findings:

- Six out of 10 U.S. consumers surveyed say they "enjoy getting postal mail from brands about new products."
- Across all key verticals – from financial and insurance to retail and personal care – **direct mail is preferred over email by all respondents.** The propensity for direct mail also extends to the 18-34 year old demographic.

Attitudes Towards Postal Mail and Email

Statement	% of Consumers
I enjoy checking my postal mail box	60%
I receive too many emails in one day	65%
I enjoy getting postal mail from brands about new products	59%
I enjoy getting email from brands about new products	43%
I get a lot more emails that I do not open	75%

- Consumers report getting an emotional boost from receiving direct mail; 60% agree they "enjoy checking their postal mail boxes."
- Half of all respondents concur with the statement, "I pay more attention to information I receive by postal mail than if it was received by email."
- One-third (34%) of those who prefer email to print mail cite "saving on paper" as the main reason, up from 21% in 2010. Of those who favor print mail to email, 32% say they "already get too much email," and 30% "prefer not to have to print the information they need."
- Six out of 10 (59%) enjoy receiving direct mail sent to their homes promoting new products, while 43% like receiving new product emails from brands. Note: Respondents could agree to one or both statements.
- When it comes to direct mail, 31% prefer personalized mailings, compared to 5% who are fine with generically addressed mail – demonstrating that "Current Occupant" does not carry the emotional pull of a personally addressed mailing.
- Consumers say the most trustworthy channels are newspapers (21%), company websites (21%), and direct mail (16%). Social media and blogs are deemed least trustworthy, each garnering a 6% trust level.
- Three-quarters (75%) of consumers report receiving more email than they can read.

continued >

> "We Prefer Direct Mail" *continued*

- Three out of 10 (31%) respondents do not find ads on social media sites useful. With this said, 10% report using Facebook to research and review product information, up from 6% in 2010.

In response to the findings, Warren Storey, VP of Product Marketing and Insight at ICOM, a division of Epsilon Targeting, said, "It's just 'surprising' because everything you hear in the media is basically counter to what the consumers are actually telling us, which is that direct mail is still the preferred channel. **Direct mail is one of those mediums that is always quietly there in the background doing a great job.**"

About: Epsilon Targeting has completed three surveys since 2008 on the topic of consumer channel preference to generate trending data. The U.S. section of this 2011 study is based on completed surveys from 2,226 consumers.

Source: Epsilon Targeting, Consumer Survey Results Reveal Direct Mail Is Most Preferred Channel for Receipt of Brand Communications, December 1, 2011.

Consumers Turn to Print, TV, Radio—Not Social Media—for New Brand Info

With the surge in social media's popularity, marketers are increasingly using Facebook and Twitter to communicate with customers. Yet with this said, consumers say they are **most likely to learn about new brands, products, or services from offline media and word-of-mouth, as opposed to social media and other digital channels.**

A survey by AYTM Market Research of 2,000 U.S. Internet users finds just 6.5% "most frequently" hear about new brands, products, and services via social media, while 17.6% say they "often" do, and 26.5% share they "sometimes" do. A quarter (26%) of respondents "never" learn about new offerings via Facebook, Twitter, Google+, and the likes.

Instead, the study finds, the majority of consumers are most apt to learn about new offering from offline media, such as magazines and newspapers, TV, and radio. Among respondents, 16% "most frequently" learn about new brands, products, and services via offline channels, 34.9% say they "often" do, and 31.8% said they "sometimes" do. Just 4.2% say they "never" first hear about new brands and products via print and broadcast media.

After traditional channels, the ways consumers "most frequently" and "often" use to learn about new brands and products are word-of-mouth (48.9%), shopping at brick-and-mortar stores (40.8%), online news sites and blogs (32.6%), online ads (30.8%), and shopping sites (30.4%).

Source: eMarketer, Most Consumers Still Don't Talk About Brands on Social Sites, January 10, 2012.

What Gets Envelopes Opened

Pitney Bowes commissioned a study to identify **factors that could influence when and whether recipients would open their mail and read it**. The survey of 1,500 U.S. adults examined preferences, attitudes, and behaviors about mail as received at home.

For the study, participants were presented with graphic depictions of envelopes to determine which features would make them most likely to open them. They examined an average of 16 screens, each containing four randomized envelopes, to test for variables including the presence of text, graphics, and color on envelope fronts and backs. Key findings:

What's printed on the front of the envelope strongly influences when and whether it gets opened.

- Recipients are 69% more likely to open a mail piece with color text and graphics on the front, before opening pieces with no headline or graphic.
- Given a choice of color graphics or black-and-white text, mail recipients are 2.5 times more likely to open envelopes with color graphics first.

What's printed on the back of the envelope is less influential.

- Six out of 10 (57%) hardly ever notice what is printed on the back of an envelope when sorting through or opening their mail.
- However, as with the front of the envelope, the study indicates the presence of color text and graphics on the envelope's back is significantly more likely to influence the decision to open, rather than black-and-white only.

Mail recipients favor print mail to email for bills, invoices and financial statements, as well as most catalogs and promotions.

- Two-thirds (66%) of recipients prefer to receive catalogs by physical mail.
- Six out of 10 (61%) favor receiving bills and invoices by physical mail.
- Nearly the same numbers of mail recipients (59%) prefer to receive financial or bank statements by physical mail, as opposed to email.

About: The February 23-March 3, 2010 online survey of 1,503 opt-in research panelists (age 18+) was conducted by Leflein Associates, on behalf of Pitney Bowes. The sample margin of error of = +/-2%.

Source: Pitney Bowes, Color Makes a Noticeable Difference, 2010.

Nearly 1 in 5 Smartphone Users Makes a Purchase After Scanning a QR Code

A survey of over 1,200 U.S. adults conducted by research firm Chadwick Martin Bailey looks at how consumers are using QR codes, what they're looking for when they scan, and what will motivate them to make it part of their purchase process. Key results:

- While only 21% know QR codes by name, 81% of respondents report having seen the ubiquitous black and white squares.

- For smartphone owners, QR codes are becoming a part of the purchase process; **Half of smartphone owners surveyed have scanned a QR code, and nearly one in five (18%) made a purchase** after code scanning.
- Results are more mixed as to the usefulness of the information received from scanning a QR code; 41% of respondents say the scan proved useful, 42% report mixed results, and 18% say the scan was not worth it.
- Among those who scanned codes, reasons include: curiosity (46%), to obtain more information about a company, service, product, deal, or event (41%), to take advantage of a promotional offer (18%), or to gain access to exclusive content (16%).
- The top reason to scan a QR code (noted by those who have scanned and those who haven't) is interest in a discount, coupon, or free item (46%).
- Magazines and newspapers are the top source for scanned QR codes (35%), followed by packages (18%), websites (13%), direct mailings (11%), billboards or signs (11%), emails (4%), and other (7%).

"Consumers are curious about QR codes and the information they can get," notes Jeff McKenna, Senior Consultant at Chadwick Martin Bailey. "But companies need to understand what consumers expect from a scan whether it's more information, a coupon, or exclusive offer. Companies who use QR codes successfully to drive engagement or sales will be those who meet customer expectations and offer compelling reasons to scan."

About: Data for the Consumer Pulse study was collected from 1,228 U.S. adults (age 18+) via a nationally representative online survey questionnaire fielded by CMB in October 2011.

Source: PRWeb, New Study Reports Nearly 1 in 5 People Made a Purchase After Scanning a QR Code, January 4, 2012.

Print Sways Shoppers' Store Choices, Including Among the Young

Updated research from measurement firm Nielsen to "determine the relative merits of print vs. digital media in today's retail environment," finds that **contrary to the message often heard regarding print channels losing ground to digital as a means of influence, consumers say it is print advertising that most influences their store and shopping choices.** Key findings from Nielsen's survey of 11,000 U.S. adults:

- The media sources shoppers as a whole say they most rely on weekly for sales and product info are newspapers (69%) followed closely by direct mail (67%).
- The only digital vehicle demonstrating equivalent reach is email sent from retailers (67%). Other digital channels' influence, such as social media (45%) and a store's website (37%), lag by double-digits.
- Interestingly, store choice for the youngest generation of shoppers, those age 15 to 32, is the most heavily influenced by print vehicles.
- Direct mail (92%) and newspapers (91%) lead as most influential channels for the majority of the "most tech-savvy generation." The digital channels most influencing younger consumers (ages 15-32) are store websites (84%) and retailers' emails (78%); Social media motivates the shopping choices of 55% of these young consumers.
- When asking about future messaging, more than 70% of shoppers express a desire for digital delivery of marketing materials via a store's website or a retailer's email. Approximately a third say they are interested in ads sent to them via social media or smartphones apps.
- With this said, nearly 90% of shoppers wish to continue receiving print advertising at home or in-store, "suggesting a preference for multi-media information delivery that maximizes the number and nature of contact points for on-the-go consumers."

About: Nielsen's findings are based on a survey among an 11,000 shopper subset of the Nielsen Homescan panel.

Source: Nielsen, The Evolution of Circulars: From Print to Digital, Q4 2011.

About Print in the Mix

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At Print in the Mix we review research from a variety of academic and industry resources and distill the quantitative facts to present top-line synopses for use by media specifiers, print providers, and others as they make the case for "print in the mix."

The Print in the Mix Clearinghouse publishes its print newsletter two to three times a year and issues an e-newsletter monthly. Subscription is free for both. To sign-up, please visit us at printinthemix.com. **Print Council Members:** Additional copies of this newsletter are available upon request.

Dr. Patricia Sorce: Editor-in-Chief || 585-475-2313 || psorce@rit.edu
Liz Dopp: Managing Editor || 585-475-7436 || liz.dopp@rit.edu

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About The Print Council

The Print Council is a business development alliance formed by leaders in the graphic arts industry whose goal is to influence and promote the greater use of print media. Through education, awareness, market development, advocacy, and research, The Print Council serves the industry to develop, maintain, and increase the market for printed goods. In addition, the Council works closely with industry associations, ongoing initiatives, and relevant user groups that share common goals.

For more information, please contact Executive Director Ben Cooper at bycooper@wms-jen.com or info@theprintcouncil.org.

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