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Memo

TO: The Fund for Animals
FROM: David B. Hill, Ph.D., Director
DATE: January 26, 2004
SUBJECT: Results of New York Metro survey

Near the end of last year, December 17-20, 2003, we fielded the survey you commissioned of the opinions of females 18 to 50 years old living in the New York Metropolitan area. The margin of error for this survey of 500 women is $\pm 4.4\%$ at the 95 percent confidence level.

The survey was designed to measure awareness of advertising sponsored by The Fund and other related groups, as well as to replicate portions a similar study conducted in July of 2003.

Message awareness

Overall, just 21 percent of respondents reported having read, seen or heard in the past six months "a lot" (6%) or "some" (15%) about the debate over wearing fur. This represents a small but significant increase over the 16 percent that reported a lot or some exposure in the survey taken last July.

- Recall of debate over the fur issue varies only modestly by demographic classification. Older (40-50) women, those with college degrees, and the most affluent women were somewhat less likely to have heard much about the issue.

More robust improvement was noted in advertising awareness as 32 percent of the women said they had read, seen or heard anti-fur advertisements in the past six months. That reflects an increase of 8 points over the 24 percent reporting ad exposure last July.

- As with exposure to the fur debate, older (40-50) women were less likely to report having seen advertisements. But education and income provided strikingly different results. Better educated and more affluent women were MORE likely than others to report advertising exposure.

Television was the most frequently mentioned advertising medium, cited by 41 percent of those exposed, while print advertising in newspapers and magazines was recalled by 21 percent. Outdoor sign advertising was recalled by 14 percent and radio ads by only 4 percent of those recalling any ads.

Not surprisingly, word of mouth (debate) exposure and advertising exposure are related, but not entirely one in the same. Only 67 percent of those who reported debate exposure had seen ads and just 44% of those who reported advertising exposure also reported "a lot" or "some" exposure to word-of-mouth debate.

Conclusions

- Because word-of-mouth lags behind advertising exposure, the traditional remedy would be to expand the public relations budget in deference to more advertising.
- Because radio is typically a cost effective means for reaching targets like younger and less affluent women, and because radio messaging is almost non-existent, The Fund might consider wider use of this broadcast medium as an alternative to cable television.

Impact of advertising

Although there was significantly greater recall of advertising in this survey when compared with last July, the self reported efficaciousness of the advertising was more modest. Last July, 50 percent described the advertising as having some (“strong” or “some”) impact. In this survey, just 47 percent reported similar impact (although self-reported “strong” impact rose from 19 percent to 24 percent).

The indirect measurement of advertising’s impact produces mixed results. As shown in the table below, ad exposure does not change purchase intentions or sentiment about animals needing their fur, but it does seem to influence shopping preferences and sentiment that fur is okay to wear for those who want it.

	Exposed to advertising	Not exposed to advertising
Likely to buy fur in next 6 months	15%	14%
Animals need fur more than people	79%	85%
Prefer to shop at stores w/o fur	49%	37%
People should wear fur if the want	67%	75%

The failure of advertising to influence the first two indicators in the table above may reflect a seasonal variation. In fact, this survey, taken during a cold winter month, shows a rise over the summer survey in purchase plans for all fur garments and particularly for garments made entirely of fur rather than just trimmed. This might suggest the conclusion that the apparent impotence of the advertising is misunderstood. It might be true that winter purchase plans would have been MUCH higher had it not been for the advertising suppressing those intentions. But because purchase plans rose even among those not exposed to ads, this conclusion is speculative at best and overstated at worst.

The table below shows that “debate exposure” is generally as effective as advertising exposure in influencing attitudes and behaviors, again suggesting the relative importance and likely efficacy of cost-effective public relations expenditures that foster debate.

	Exposed to advertising	Exposed to debate
Likely to buy fur in next 6 months	15%	19%
Animals need fur more than people	79%	85%
Prefer to shop at stores w/o fur	49%	47%
People should wear fur if the want	67%	68%

Conclusions

- Because of potential seasonal variations in fur purchase plans, it is nearly impossible to definitely conclude much about the efficacy of anti-fur advertising, but the measured results are modest at best. Even less costly public relations may be as effective as paid advertising in inducing desired attitudes and behaviors.

Purchase plans

As in the July survey, intent to purchase fur is highest among younger (18-29) women and ethnic minorities. Variations by income and education are not systematic, though higher status individuals are slightly less likely to report purchase plans.

Minorities are especially interested in purchasing garment made entirely of fur (or fake fur).

Despite that fact that younger women and minorities seem more inclined to purchase fur, their attitudes belie this. Younger women are more likely to agree that "animals need their fur more than people do," and less likely to say that "people should be able to wear fur if they want to."

Conclusions

- Intent to purchase fur is buttressed by attitudes beyond fur or animal issues, i.e., people buy fur for status or prestige, for perceived warmth, for fashion. To change purchase behaviors, a broader range of arguments beyond animal issue alone must be employed to change the plans of potential fur purchasers.