

Eyecare Journal Advertising Solutions

Because You Can't Manage What You Don't Measure



**Guide to Effective
Eyecare Journal Advertising**

PERQIHCI
RESEARCH

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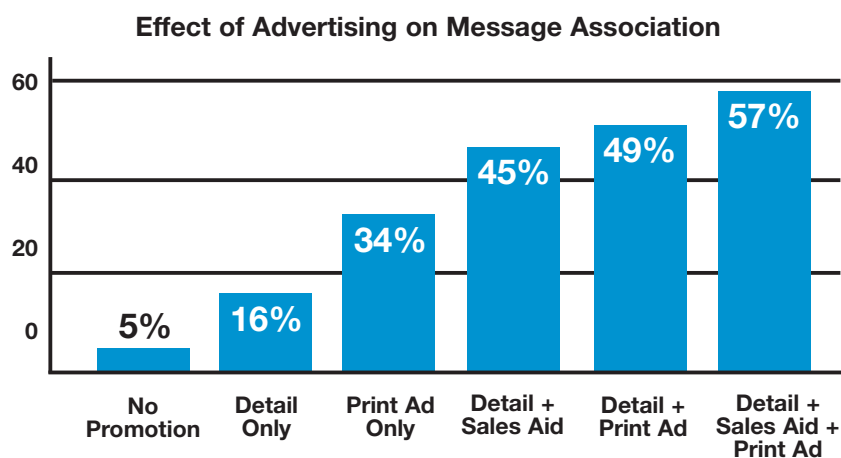
PERQ/HCI Guide to Effective Eyecare Journal Advertising Because You Can't Manage What You Don't Measure

Comprehensive measurement of the eyecare marketplace is essential to managing an effective ad campaign. No matter how large or small your business, no matter what target within the eyecare marketplace your products reach, when you place an ad in eyecare journals you are entering into a diverse and crowded conversation. Conventional advertising wisdom dictates that you must “break through this clutter” to get your message heard. You already know some of the best ways to market your products, and you have achieved success with your creative strategies.



But are you using professional journals that deliver the most return on your substantial investment?

An analysis of promotional efforts to physicians in the pharmaceutical industry shows just how important effective print advertising can be as part of the overall media mix. When used in conjunction with sales efforts, print ads significantly added to eyecare professionals' recall of particular marketing messages. Messages supported by print ads in conjunction with other efforts enjoyed greater overall market share as well.



Furthermore, a 2002 AC Nielsen/HCI study concluded that advertising improves the effectiveness from sales detailing alone by 38%. Print advertising remains an essential component in your marketing mix, but for the most effective targeting, companies must ask: **How likely is it that my ad in a particular publication will reach my targets? Am I getting the most from my ad budget?**

This Guide to Effective Eyecare Journal Advertising is designed to not only increase your understanding of the dynamics at work in eyecare journal advertising, but to give you a more complete picture of how to measure the success of your marketing initiatives.

In the following pages, you will learn about various tools that exist to help you plan more intelligently and make smarter decisions - services from the widely acknowledged leaders in their respective fields, such as **SRDS®** and **PERQ/HCI**.

By collecting the most detailed and accurate information possible from multiple objective sources, you can feel confident that your ad campaigns are backed by powerful knowledge of the environment in which they will be placed - resulting in better decision making, and measurably better campaigns.

As you read through this Guide to Effective Eyecare Journal Advertising, if you have any questions or would like to learn more about the solutions discussed, [please call Dave Emery at 800.243.2702 ext. 235.](#)



Journal Profiles, Circulation and Rates: Where to Start

The SRDS (Standard Rate and Data Service®) Business Publication Advertising Source® (BPAS) is a good starting point to help you better understand the options available to advertisers. SRDS' objective relationship with publishers ensures standardized, current information.

For over 84 years, media planners at advertising agencies of every size have used SRDS resources for gathering key information on media opportunities. Today, over 95% of advertising agencies use SRDS products to some extent. Media properties and advertisers like you also use SRDS daily to gather information and stay up-to-date on their marketplace.

SRDS' BPAS is a centralized source for all the essential data you'd need to start planning, including: editorial profiles, advertising rates, editorial calendars, links to publication Web sites and media kits and access to audit statements. SRDS is also the industry resource for reliable circulation data, detailed by controlled versus paid circulation.

Think of SRDS as your personal research assistant: SRDS data experts make over 21,000 listing updates every month, continuously updating the data online. With approximately 1,200 healthcare titles listed (part of a larger database of over 5,500 b-b publications), and over 50 journals specifically serving the eyecare marketplace, you will likely find ad opportunities you have not previously considered.

SRDS listings include the following information:

- Publisher's Editorial Profile
- Personnel
- Representatives/Branch Offices
- Commission and Cash Discount
- General Rate Policy
- Black/White Rates
- Bleed
- Special Positions
- Color Rates
- Covers
- Inserts
- Classified/Mail Order Rates
- Split-Run
- Special Issue Rates and Data
- Geographic and/or Demographic Editions
- Contract and Copy Regulations
- General Requirements
- Issue and Closing Dates
- Special Services
- Circulation
- Electronic Products

The screenshot displays the SRDS BPAS website interface. At the top, there is a navigation bar with 'Go To:' and various menu options like 'New Search', 'Class', 'Output Reports', 'Resources', 'Contact SRDS', 'Help', and 'Logout'. The main content area is divided into two columns. The left column features a yellow box for 'Class H29 Ophthalmology' with a 'View Profiles' button. Below this, there is a list of publications including 'Administrative Eyecare', 'American Journal of Ophthalmology', 'Annals of Ophthalmology', 'Archives of Ophthalmology', 'Cornea', 'Current Opinion in Ophthalmology', 'EyeNet', 'EyeWorld', and 'Investigative Ophthalmology & Visual Science'. The right column displays the profile for the 'AMERICAN JOURNAL OF OPHTHALMOLOGY', an Elsevier publication. It includes contact information (360 Park Ave. South, New York, NY 10010), a description of the journal's content, and sections for '1. PERSONNEL' (listing Joshua Spierer, Bradley R. Straatsma, and Eileen Daidula) and '2. REPRESENTATIVES and/or BRANCH OFFICES' (listing Mirvica Associates in Berlin, NJ).

Publications in SRDS Eyecare Classifications – H29 & H30

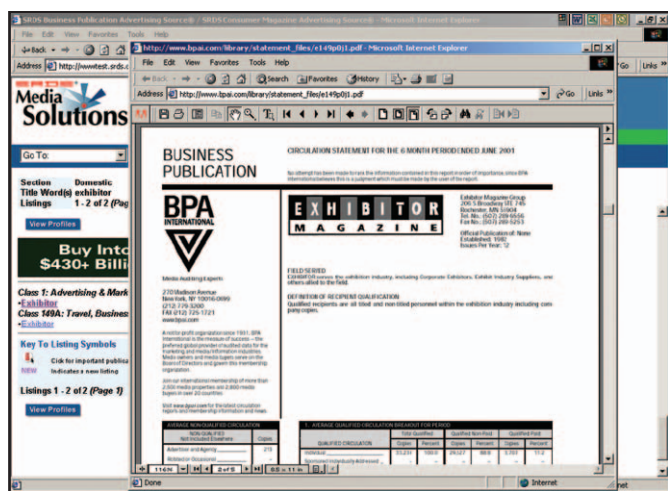
- Ophthalmology (H29) - 29 titles
- Optometry & General Eye Care (H30) - 13 titles

There are a few titles in other healthcare classes that also mention ophthalmology and optometry.

Audited and Non-Audited Publications

Some publications undergo a strict process of auditing the circulation figures they present to potential advertisers. It is important to note, however, based on their tightly controlled circulation, many specialized publications are not audited. For those that are audited, it is often very useful to examine the audit statements published by BPA International (Business of Performing Audits).

BPA International was founded in 1931 as an independent, not-for-profit, self-regulating organization to verify circulation claims. For business publications and consumer magazines, BPA International verifies all paid, all controlled, or any combination of paid and controlled circulation and reports it all in one concise document (which is instantly accessible from a publication's listing on the www.SRDS.com Web site or www.bpai.com). For publications that are audited by BPA, audits are a useful source for objective baseline information.



In addition to verified circulation, one very useful feature of BPA reports is business/industry breakdowns - a detailed portrait of the market segments targeted by a particular publication (e.g., optometric students vs. practicing optometrists). These details can be an important way to more precisely target your journal selection.

Obtaining circulation figures (whether from sworn publisher statements or from BPA audits) and the planning and contact data in SRDS are your best initial steps for gauging appropriate publications for your advertising, and for developing an overall plan for the media you wish to target. However, in order to help ensure that your message is seen by your targets, **you'll need more detailed information: receivership, average issue readership and ad exposure data from PERQ/HCI.**

For specific information on using the SRDS Business Publication Advertising Source, **please call Andy Spantiko at 800.851.7737 ext. 5122.**

For more information on Eyecare Journal Advertising Solutions, **please call Dave Emery at 800.243.2702 ext. 235.**

Journal Readership: A More Complete View of Ad Opportunities

Although understanding circulation is important, too often advertisers rely solely on the stated circulation of professional journals to choose where to place ads. Circulation can be viewed as the beginning of your advertising decisions, while more specific information should be used to further evaluate and select your media options.

Ophthalmologists, Optometrists and Opticians are busy professionals who may not take the time to read every journal they receive on a regular basis. Indeed, they might not even realize they are receiving the publication. Although a journal is delivered to a number of recipients (circulation), you still need information on what the audience actually does with the publications they receive (readership).

PERQ/HCI readership measurement delves deeper and gives you the detail on this behavior. PERQ/HCI surveys 1,000 randomly selected Ophthalmologists, 1,000 Optometrists and 1,000 Opticians from across the country using names selected by Direct Medical Data.

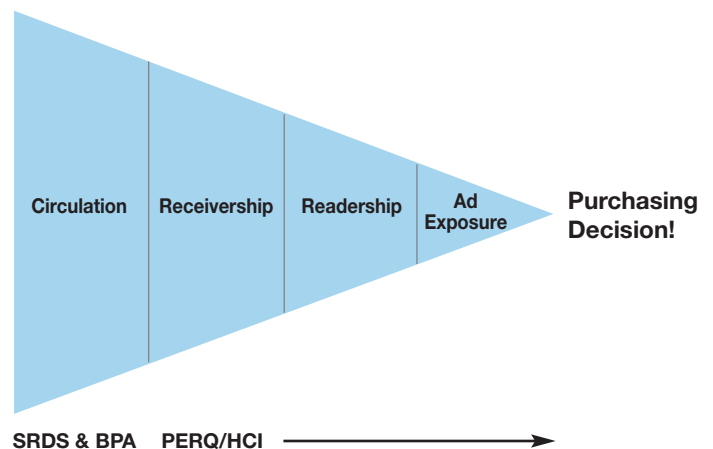
The PERQ/HCI FOCUS™ study asks:

- How often do you read the journals you receive?
- How thoroughly do you read them?

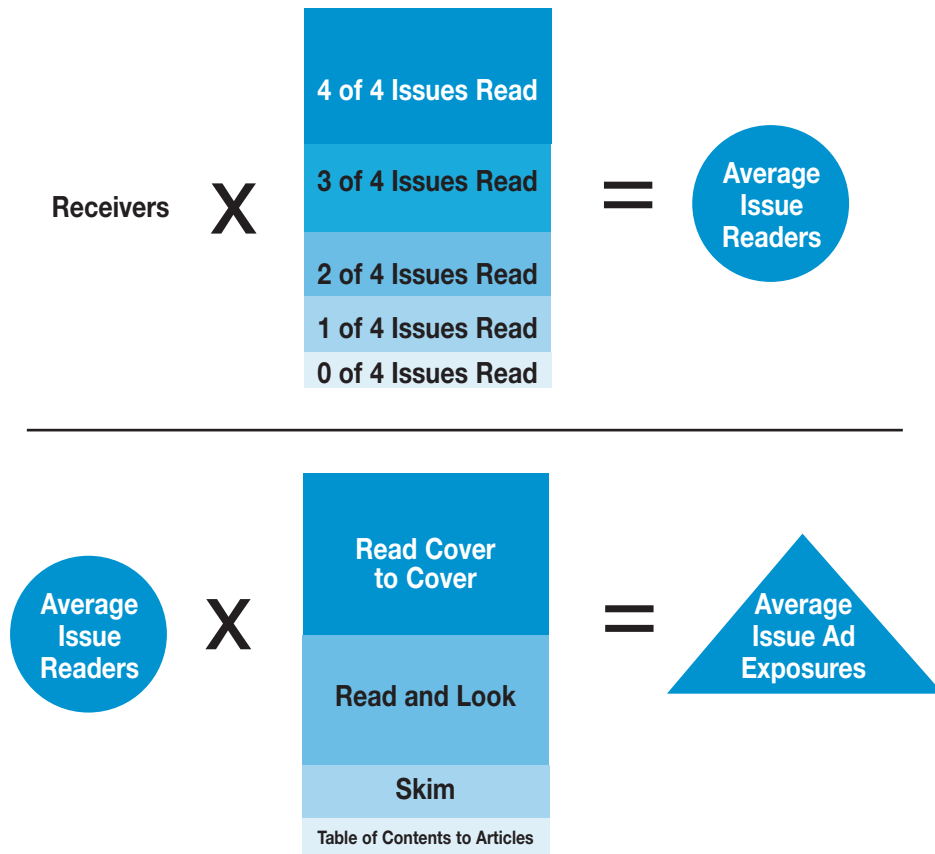
These questions provide quantifiable measures that can be used to give a more detailed picture of readership behavior - and a clearer picture of the effectiveness of advertising placed in these journals. The PERQ/HCI FOCUS study discovers:

- How many Ophthalmologists, Optometrists, and Opticians are likely to read the issues they receive (Average Issue Readers)
- How many Ophthalmologists, Optometrists, and Opticians are likely to see an ad page in an average journal issue (Average Issue Ad Exposures)

In addition to the FOCUS methodology described above, PERQ/HCI also employs the Media-Chek®/APEX methodology, designed to explore the probability of ad exposure more deeply.



Number of Readers x Reading Frequency = Avg. Issue Readers x Reading Behavior = Avg. Issue Ad Exposure



By measuring the frequency of readership (“what Ophthalmologists read”) as well as thoroughness of reading (“how Ophthalmologists read”), the PERQ/HCI FOCUS methodology delivers the most accurate estimate available of how likely it is that your message will be seen.

Journal Readership in the Eyecare Industry

Focusing on readership, in contrast to circulation and receivership, helps protect your advertising investment from one of the most commonly cited advertising pitfalls: allocating dollars to publications that aren't being thoroughly read by your target audience and the decreased possibility that your message will be seen.

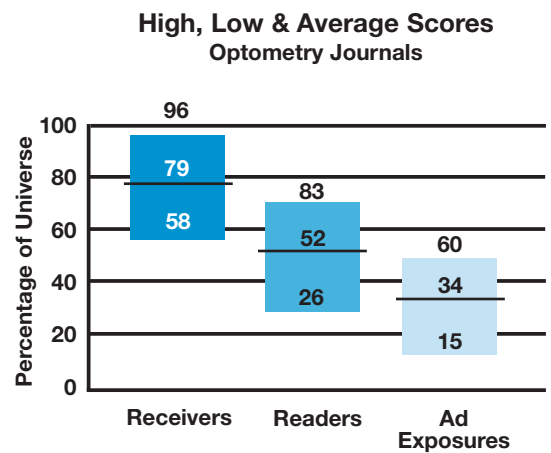
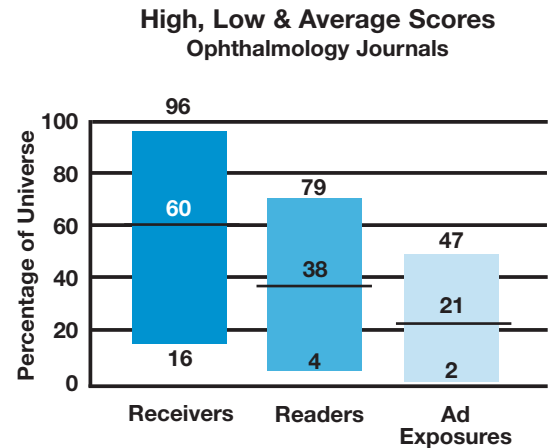
The eyecare marketplace is similar to other healthcare segments studied by PERQ/HCI in that circulation does not directly correspond to average issue readership or average issue ad exposure. 2003 PERQ/HCI data indicate that among the professional journals that circulate to the entire universe of Ophthalmologists, the average receivership is 60%. Certain journals are "read better" than others, resulting in scores ranging from a high of 79% down to a low of 4% of the circulation that reads any given issue among Ophthalmology titles.

Knowing the circulation of a publication does not guarantee how many eyecare professionals will see your ad.

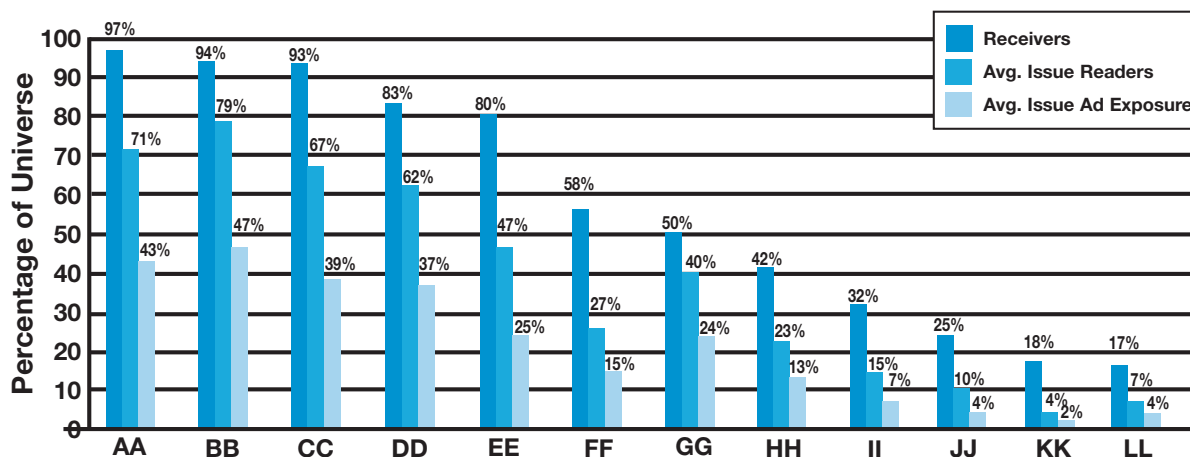
The PERQ/HCI FOCUS methodology also examines reading patterns. Study respondents are asked to identify whether they read a journal cover-to-cover, look through the publication and read articles of interest, skim through the publication, or look at the table of contents and go straight to articles of interest. Responses are then weighted to represent the likelihood of seeing an ad based on reading behavior.

Where do the journals you're advertising in fall? You want to make sure your ads are in journals where they will be seen by your prospects. In the 2003 FOCUS Eyecare Readership Report these ad exposure scores for Ophthalmology titles range from 47% for the strongest journal to 2% of receivers seeing an ad in the lowest ranked publication.

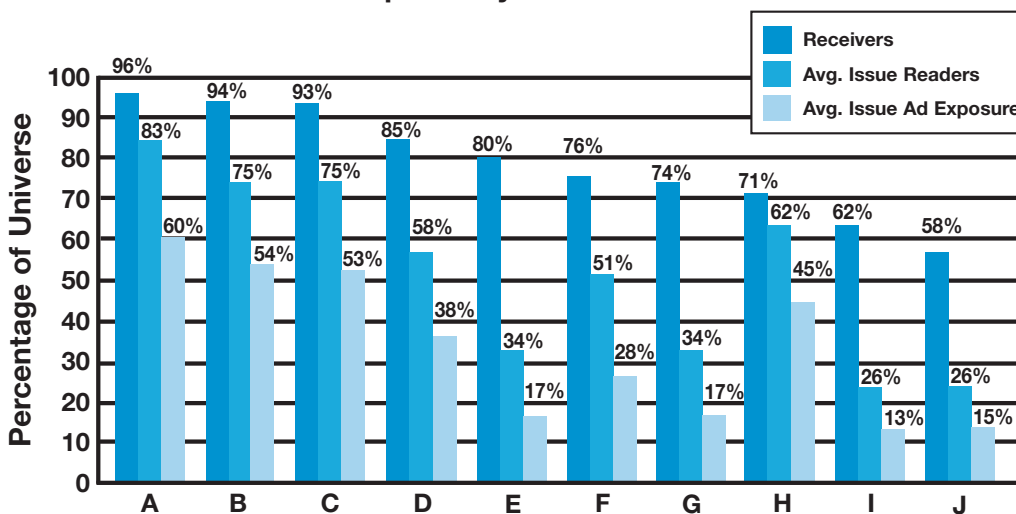
Receivership, Readership and ad exposure scores are also available for optometry titles.



Selected Ophthalmology Journals Studied



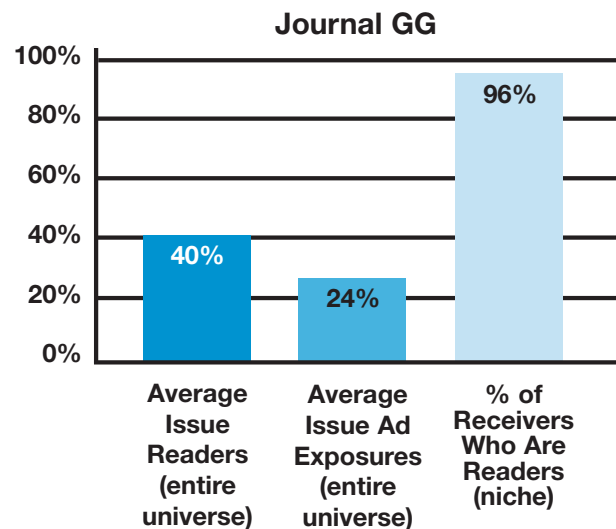
Optometry Journals Studied



The graph above clearly illustrates the difference in receivership, readership and ad exposure, based on 2003 FOCUS data for various eyecare journals. Although Journal C in Optometry is received by 93% of the universe of optometrists, 75% of the universe reads the publication and 53% is likely to see an ad.

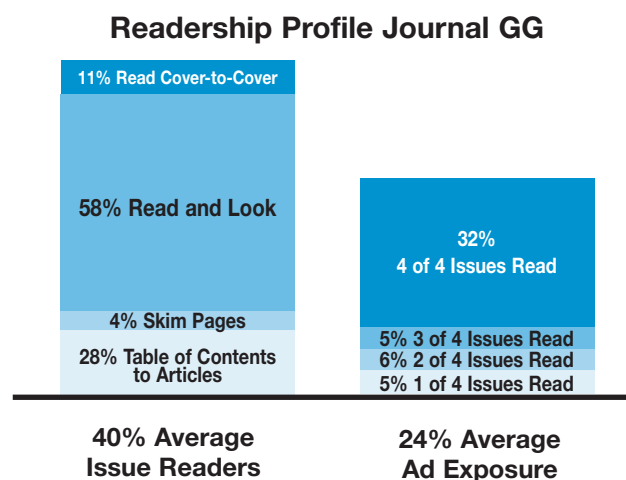
Niche publications that are not delivered to the entire universe of Ophthalmologists, Optometrists and Opticians may appear to be penalized for their lower circulation; however, by looking at the journal receivers in these instances, you can see why circulation should not be your sole determination for media selection. If a journal only goes to a highly specialized audience, it is not going to have the circulation of a journal that is sent to all licensed Ophthalmologists. However, because the content of these niche journals is targeted to a specific interest of the reader, they may be read more thoroughly.

For example, let's examine Journal GG, an Ophthalmology journal in the 2003 FOCUS Readership Study. Because of the specialized nature of its editorial content, Journal GG's circulation is only 50% of the eyecare universe. Consequently, its average issue reader and average issue ad exposure scores are comparatively low when projected to the entire universe (40% and 24% respectively).



However, by looking at the percentage of eyecare professionals that read Journal GG (48%), and dividing it by the percentage of those who receive the publication (50%), you learn that **among the niche audience that receives Journal GG, 96% read the publication.** This means that **while the entire universe does not receive this journal, those that do, read it.** If you're trying to reach those niche prospects, your ad in Journal GG would reach them without wasted circulation.

PERQ/HCI readership studies are an essential part of your decision-making when planning print advertising, helping you to understand the value of key publications and consider the benefits of niche journals. **By placing your advertising in the journals that your targets read regularly and thoroughly, you'll communicate your message more efficiently to its best audiences.**



While the advertising environment may be getting more complex, **PERQ/HCI offers a variety of measurement tools to enable better ad placement decisions.** In addition to the FOCUS methodology described above, PERQ/HCI also employs the Media-Chek/APEX methodology - designed to more deeply explore the probability of ad exposure.

2003 FOCUS™ Eyecare Journal Readership Study

The FOCUS Eyecare sample consists of 1,000 Ophthalmologists, 1,000 Optometrists and 1,000 Opticians randomly selected from the Direct Medical Data's list of member and non-member, active private practices across all 50 states.

Specialties Surveyed:

- Ophthalmologists
- Optometrists
- Opticians

Data Are Reported By:

Ophthalmologists

- Total Universe of Ophthalmologists
- High Volume Practice (101 or more patients per week)
- Volume and Type of Surgeries

Optometrists/Opticians

- Total Universe of Optometrists/Opticians
- High Volume Practice (76 or more patients per week)
- High Volume Refractions (26 or more per week)
- Self/Employed/Owner
- Years in Practice (15 or less years)
- Lens Recommendations

Publications Studied

Publications included in the PERQ/HCI FOCUS Eyecare Journal Readership Study must be issued at least quarterly, must contain editorial content and must include advertisements from multiple sponsors. To be included in the readership report, the publication must circulate to at least 20% of the specialty universe.

2003 Ophthalmology Title Reported

- Administrative Eyecare
- American Journal of Ophthalmology
- Archives of Ophthalmology
- Cataract & Refractive Surgery Today
- Contact Lens Spectrum
- Eynet
- Eye World
- Journal of the American Medical Association (JAMA)
- Journal of Cataract & Refractive Surgery
- Journal of Refractive Surgery
- Ocular Surgery News
- Ophthalmology
- Ophthalmology Management
- Ophthalmology Times
- Refractive Eyecare for Ophthalmology
- Review of Ophthalmology
- Survey of Ophthalmology
- Vision Care Product News
- 20/20

2003 Optometry Titles Reported

- American Optometric Association News
- Contact Lens Spectrum
- Eyecare Business
- Optometric Management
- Journal of the American Optometric Association
- Primary Care Optometry News
- Review of Optometry
- Vision Care Product News
- Vision Monday
- 20/20

Journal Advertising Spending: The Measure of the Market

Without knowing the size of a market, the trend in spending and the players in it, advertisers cannot set a reasonable strategy to compete for message awareness.

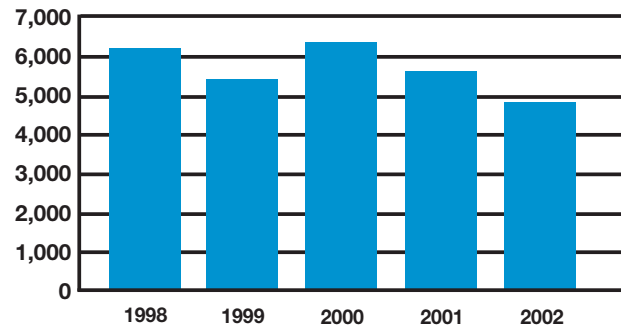
To direct advertising resources most efficiently in a rapidly changing market like eyecare, it is critical to know which markets are growing and which are shrinking. In a large, growing market, you may want to hit hard with many larger advertising units. In an established market with few competitors, a quieter, less expensive presence may be adequate. In either case, you need an ongoing source of ad spending information to make well-informed decisions.

Share of Voice, the percent of the total ad dollars your products account for in a category, is critical to successfully communicating to your target audience. If you own only 10% of the dollars being spent in your market and a competitor owns 50% you will have a difficult time impacting the potential buyer of your product.

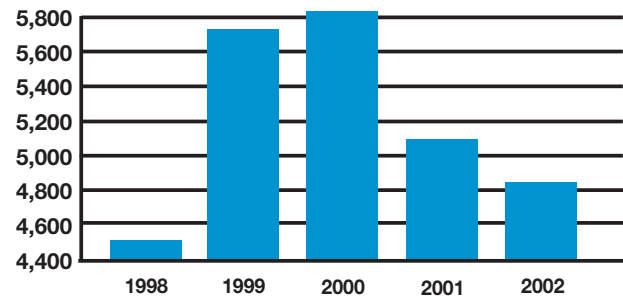
Do not assume that share of market equals share of voice. Because a product dominates the sales in a category does not mean that they are the heaviest advertiser as well. Market leaders often become complacent and can be effectively challenged by an aggressive, broad-based advertising campaign. Knowing what a competitor is spending on promotion is as crucial as knowing the sales revenue of their line.

Product life cycle also plays a major role in determining advertising spending. A new product, unless it is truly a “breakthrough” item, requires much heavier and more information-laden promotion than does a more established product. An introductory campaign needs to provide all the reasons to buy while an older product can just remind the buyer of who they are. These data are categorized and reported by company, product, classification, and journals where a product’s ads appear.

Ophthalmology Journal Annual Pages



Optometry/Opticianry Journal Annual Pages

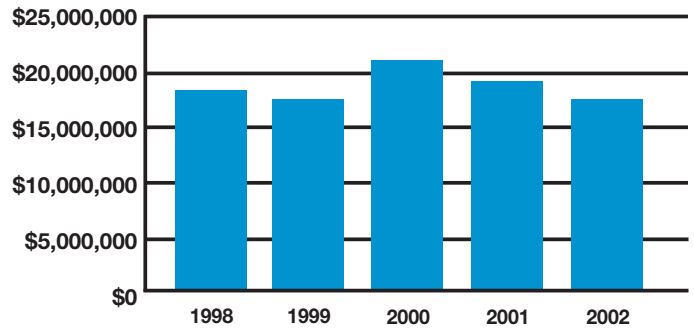


Competitive product life cycle also impacts the effective campaign strategy. Increasing promotion on an established product as a new competitor is being launched can help slow the erosion of market share to the newer product.

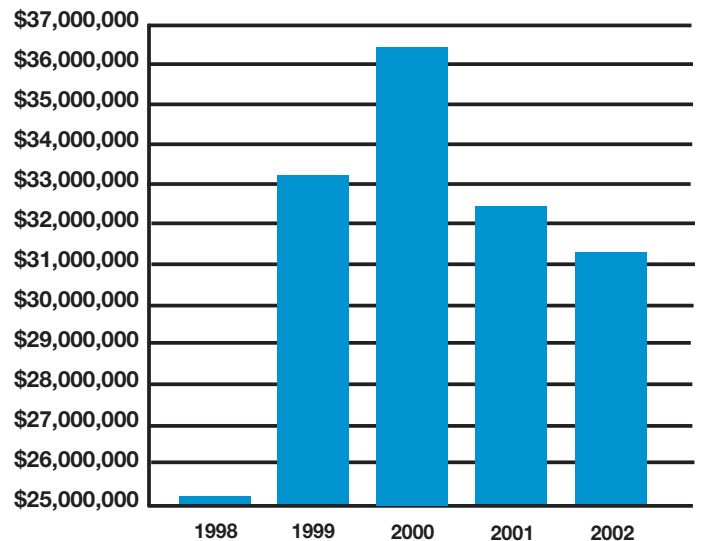
Finally, understanding how your competitors are spreading their promotion budgets across product lines can provide clues to their internal priorities. If a large portion of a company's journal advertising is being placed in one area, other product lines of that competitor may be vulnerable to a promotional blitz.

JAR (Journal Ad Review™) is a detailed monthly report that tracks advertising in over 600 healthcare-related journals across the entire industry. Customized monthly reports specifically designed for use by companies in the eyecare marketplace are available, and document dollars spent, ad pages and insertions placed. These data are categorized and reported by company, product, classification, and journals where a product's ads appear.

Ophthalmology Journal Annual Dollars



Optometry/Opticianry Journal Annual Dollars



Understanding Market Share Using JAR Data

JAR data can also be used to track detailed information on the eyecare marketplace at large. PERQ/HCI tracks 100% of all the ads placed in the important publications in this market, so you can be assured that you receive a comprehensive overview of market share.

- Look at a particular journal before placing an ad to gauge the competitive environment.
- How many products are you really competing with for customer attention?
- How many ads are cluttering the sales environment, and from whom?
- How many ads appear for a given competitive product in one month?

PERQ/HCI Eyecare Market Share Reports outline the top products in 85 classifications, as well as detailed spending information for over 450 companies.

The Ophthalmology Market – At a Glance

Top Journals	Market Share 1Q-2Q 2003 Based on Dollars	Market Share 1Q-2Q 2003 Based on Pages
1. Ocular Surgery News	24.6%	21.7%
2. Ophthalmology Times	17.7%	17.3%
3. Review of Ophthalmology	14.1%	11.7%
4. Ophthalmology Management	13.4%	11.6%
5. Eye World	6.9%	7.7%

Top Product Classifications	Market Share 1Q-2Q 2003
1. Ophthalmic Surgical Supplies	17.2%
2. Miotics & Glaucoma Others	15.7%
3. Ophthalmic Equipment	13.8%
4. Intraocular Lenses - IOL	5.6%
5. Ophth Broad/Medium Spectrum	4.8%

Top Advertising Companies	Market Share 1Q-2Q 2003 (Based on Ad Spending)
1. Alcon Labs	18.2%
2. Allergan Inc (including Pharmaceuticals)	12.6%
3. Pharmacia Ophthalmology	11.2%
4. Advanced Medical Optics	5.2%
5. Santen	2.5%

Top Advertised Products (1Q-2Q 2003)

1. Xalatan
2. Travatan
3. Lumigan
4. Tecnis
5. Restasis

Source: PERQ/HCI Eyecare Market Advertising Placement Analysis; June 2003.

The Optometry Market – At a Glance

Top Journals	Market Share 1Q-2Q 2003 Based on Dollars	Market Share 1Q-2Q 2003 Based on Pages
1. 20/20 Magazine	25.9%	20.3%
2. Review of Optometry	13.8%	12.6%
3. Eyecare Business	13.2%	14.4%
4. Vision Monday	11.8%	13.7%
5. Vision Care Product News	10.6%	15.4%

Top Product Classifications	Market Share 1Q-2Q 2003
1. Eye Glass Frames - Adults	33%
2. Ophthalmic Equipment	10.6%
3. Eye Glass Lenses	8%
4. Ophthalmic Supplies	7.9%
5. Progressive Lenses	4.7%

Top Advertising Companies	Market Share 1Q-2Q 2003 (Based on Ad Spending)
1. Alcon Labs	4.1%
2. Marchon Eyewear	2.9%
3. Vivaint	2.7%
4. Signet Armorlite	2.6%
5. Ciba Vision Ophthalmics	2.3%

Top Advertised Products (1Q-2Q 2003)

1. Transition Lenses
2. Kodak Precise Progressive Lens
3. Visionexpo
4. Travatan
5. Cocoons Eyewear

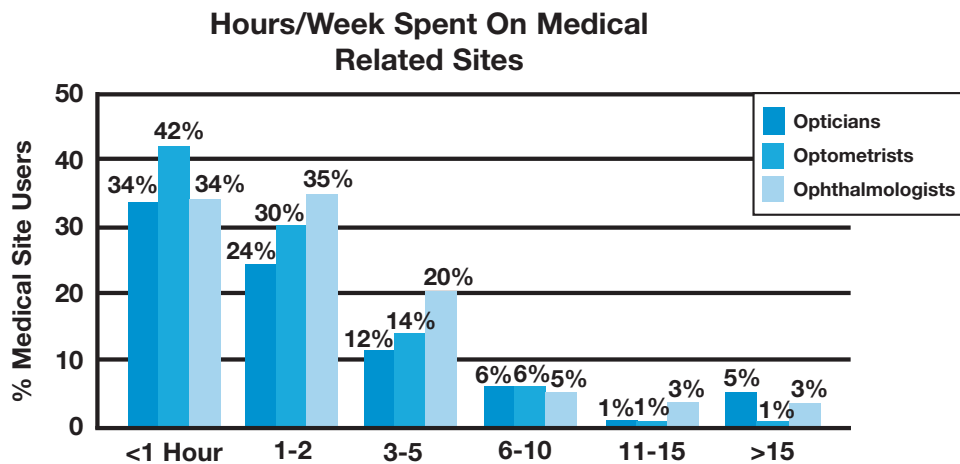
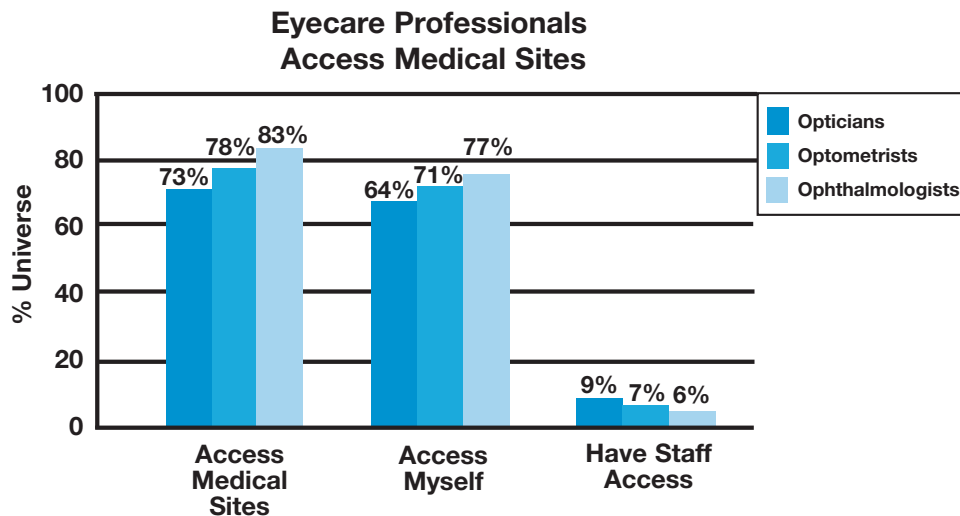
Source: PERQ/HCI Eyecare Market Advertising Placement Analysis; June 2003.

In addition to market share data, PERQ/HCI Eyecare Journal Advertising Solutions deliver data on using the Internet as part of your integrated campaign to reach eyecare professionals.

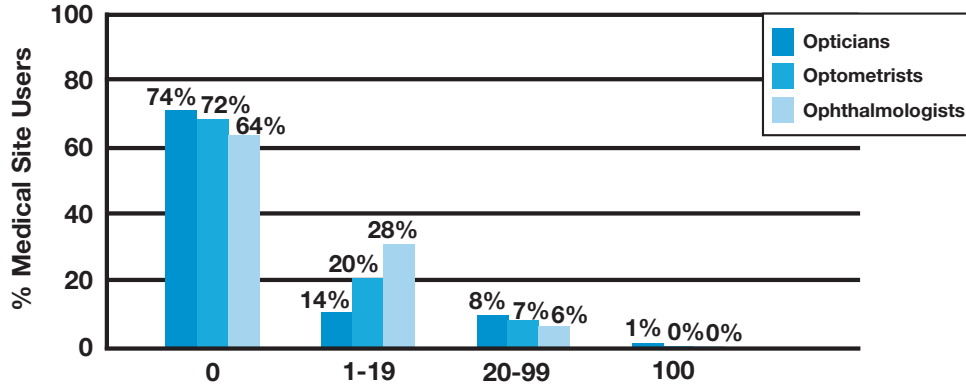
For more information on journal advertising spending and market share measurement in the eyecare industry, **please call Dave Emery at 800.243.2702 ext. 235.**

Internet Usage: How Your Targets View This Medium

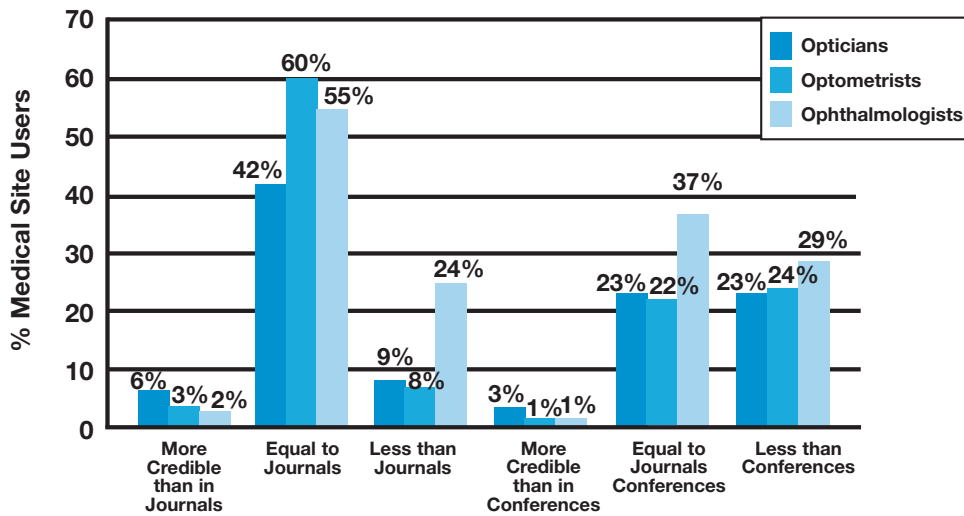
While opinions abound on the effectiveness of the Internet as part of your marketing and promotional mix, PERQ/HCI gives you authoritative data. This information analyzes the extent of eyecare professionals' use of the Internet and the reasons they use it. Learn how Opticians, Optometrists and Ophthalmologists use the Internet, for both professional advancement and enhancing patient care, and use the information to assess your own Internet marketing activities.



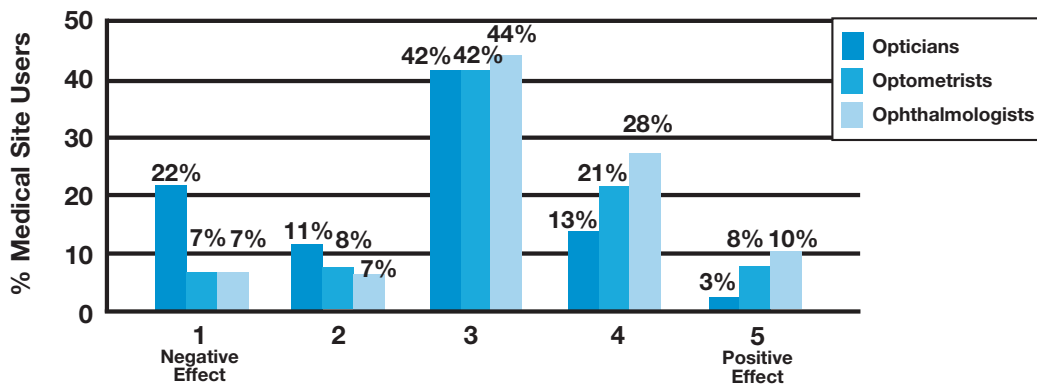
% CME/CE Credits Completed Via Internet



Credibility of CME/CE Courses Via Internet vs. Journals/Conferences



Effect of Internet on Delivery of Patient Care



For more information on Internet usage in the eyecare industry, [please call Dave Emery at 800.243.2702 ext. 235.](tel:800.243.2702)

Conclusion: Making the Most of Your Advertising Budget

PERQ/HCI is committed to helping you make the most effective and high-value decisions for placing your advertising. We believe that more informed decisions would not only help your bottom line, but also invigorate and challenge the publishers of eyecare journals to provide more information about their audiences.

The PERQ/HCI Advantage

PERQ/HCI has reported on advertising in healthcare journals across a variety of healthcare market segments for over 35 years. PERQ/HCI survey techniques, sampling approaches and report formats are in use at over 95% of the nation's major healthcare advertising agencies. FOCUS and Media-Chek/APEX readership studies are performed annually for the following specialties:

- Medical/Surgical
- Pharmacy
- Nurse Practitioner/Physician Assistant
- Managed Care
- Eyecare
- Dentistry
- Radiology
- Veterinary

PERQ/HCI is a VNU business. VNU is a global information and media company with leading market positions and recognized brands in marketing information (AC Nielsen), media measurement and information (Nielsen Media Research), business information (Billboard, The Hollywood Reporter, Computing, Intermediar) and directory publishing (Golden Pages).

PERQ/HCI looks forward to meeting with you and talking about the state of eyecare journal advertising in more detail. We welcome the opportunity to discuss the data in these reports as well as the other ways in which PERQ/HCI research can help empower your decision making.

Call 800.243.2702 ext. 235 for more information!