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MAKING THE
CASE FOR
MAGAZINE MEDIA



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Readers love
their magazines

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foreword

Strength in numbers

Chris Llewellyn, President of FIPP, heralds the new age of publishing, where strong content finally gets the true multi-platform opportunities it deserves.

It was in ancient Egypt that commercial messages first started to appear, handwritten on papyrus – a fantastic, mobile, interactive new medium that had so many more advantages over the static wall paintings that had been the dominant media to that point. And so, more than two millennia ago began the debate about advertising effectiveness.

Subsequently legions of researchers and analysts have spent whole careers in trying to establish how advertising works, a task always complicated by the fact that the palette of media choice available has never been static. By the time we get to the mid-

1990's, Brand Managers could choose between new multi-channel terrestrial, cable and satellite TV channels; national and hyper-local radio; a resurgent cinema; professional outdoor; efficient printing and distribution systems encouraging new newspaper sections and launches; an explosion of magazines; and with a PC on every desk, ever more sophisticated direct mail and direct marketing techniques.

Lurking in the background, about to emerge, eyes-blinking into the light, was 'New Media'. In 1995 the internet had only some 16 million users worldwide – mainly academics, scientists, and government agencies. Google, eBay, and Yahoo!, were

all created or came to market in the twelve months between January 1995 and January 1996. So what seemed a dizzying choice of media back then was, as we now know, just the end of a new beginning.

By the mid 2000s, there was a plethora of advertising effectiveness studies of how 'new' and traditional media worked. During this period FIPP produced a report, *Take a Fresh Look at Print*, which reviewed research studies from all over the world to produce a set of coherent findings that explained the role magazines played in the then new media mix.

Since then of course we have seen the emergence of social media, YouTube and Facebook, both launched in 2005 for example, and in April 2010 came the launch of the iPad. Together with other tablet devices, sales since launch are approaching some 200 million, becoming truly mass-market, and have changed the shape of the media industry in a quite fundamental way. Today, with an always 'on' consumer, we have a complex, perplexing panorama that sees magazines moving out of their former silo straightjackets and becoming truly multi-platform media brands, available anytime, anywhere, and anyhow.

This means there is a need to understand how these changes have affected media consumption,

and the way that advertising, and specifically magazine media advertising, now works.

FIPP, whose mission is to share knowledge and identify and communicate emerging trends to our members, the world's most important magazine media groups and associations, therefore commissioned the eminent media researcher Guy Consterdine to review and interpret the many recent advertising effectiveness studies. It has been quite a task, but with *Proof of Performance: Making the Case for Magazine Media* I believe we have produced an important piece of work that demonstrates empirically just how effective and engaging magazine media brands are irrespective of platform.

My thanks therefore go to Guy, and to my colleague Helen Bland who has driven this project brilliantly, and last but not least, to all the many researchers and their companies from around the world who have allowed FIPP access to their material.

Chris Llewellyn

President and CEO

FIPP – the worldwide magazine media association

WHAT SEEMED A
DIZZYING CHOICE
OF MEDIA BACK IN
1996 WAS, AS WE
NOW KNOW, JUST
THE END OF A NEW
BEGINNING...

introduction

This is an exciting time to be working in the world of media, particularly in magazines and digital media. Developments are moving very fast, and publishers are having to rapidly learn how to profitably migrate editorial and advertising content into digital forms. Researchers too are having to adapt, and to learn how to measure consumers' use of the new digital platforms, and how this modifies – or does not modify – consumers' use of printed magazines.

The principal objectives of this book are:

- to review some of the research-based evidence on how consumers are using printed and digital magazine content around the world;
- to demonstrate the effectiveness of the advertising these media carry;
- to present a narrative of the case for magazine media, a narrative which will apply in any country and could

- be populated with local research evidence; and
- to stimulate ideas for publishers and others in planning their own research programmes.

The context of this book is that magazine publishers are deep into the process of changing from being publishers of printed periodicals, with a few peripheral other activities, to becoming content companies who publish in many forms of media. These additional media include iPads and other tablets; smartphones; websites; digital replicas of the printed magazines; social media; electronic newsletters; emails; events; and so on. Printed magazines will remain a significant form of publication, but only one of many. It seems likely that most large magazine publishers will eventually evolve to the point where the majority of revenue comes from digital platforms instead of print; some have already reached this situation or are close to it.

What this amounts to is a very bright future for content-publishing companies.

Consequently much of this book deals with research about consumers' use of digital media.

Nevertheless for most publishers of consumer magazines print is still the major source of their audiences and revenue in 2012 and will continue to be so for some time.

There is an easy answer to those who ask "Is print dead?" No, it most certainly isn't. It will remain an important medium but it will progressively play a less dominant role in the activities of companies formerly known as magazine companies.

The phrase 'magazine media' is used throughout this book. It refers to all the platforms on which publishers with a print-magazine background are now publishing their editorial and advertising content. 'Magazine media' means the brand. In the simpler days when magazine publishers only published on paper, and any other activities such as exhibitions or other events were regarded as very subsidiary, it was sufficient to describe the medium as 'magazines' and everyone knew what was meant. Today the word 'magazines' can be ambiguous; is it referring to the printed form only, or print plus digital and other media? We need another term to describe the latter. In time another phrase may emerge as companies evolve further, but for now 'magazine media' will serve.

In this book I cite research from many countries, for it is clear that consumers throughout the globe behave in much the same way as far as print and digital magazine



"MAGAZINE MEDIA HAS BEEN SWEEPED UP IN A TIDE OF REINVENTION, EXPERIMENTATION AND OPTIMISM. WE ARE AT THE ADVENT OF POSSIBLY THE GREATEST CREATIVE REVOLUTION IN THE HISTORY OF MAGAZINES. TECHNOLOGY IS DRIVING INNOVATION IN OUR PRINT MAGAZINES, MAKING THEM MORE INTERACTIVE. OUR CONTENT IS INCREDIBLY WELL SUITED TO DIGITAL PLATFORMS. MAGAZINE PUBLISHERS WHO HAVE POSITIONED THEIR BRANDS TO SERVE THEIR AUDIENCES AND ADVERTISERS ON ALL PLATFORMS ARE EAGER TO EMBRACE THE FUTURE."

Nina Link, MPA, USA, 2011

usage is concerned. I thank all those who have brought their own research to my attention. Space does not allow me to describe the methodology of each study I have quoted, but the reference section directs readers towards further information. Most of the studies I mention were published in the last four years, and half were published in 2011 or 2012.

I would be glad to hear of other relevant research, including new studies published in the coming months, and updates of information in this book, for inclusion on FIPP's website.

*Guy Consterdine
CEO, Guy Consterdine Associates
FIPP Research Consultant
July 2012*

Executive summary

CHAPTER 1

Consumer's use of magazines in print

Printed magazines call for the reader's active participation, with the reader fully in control of decision-making about what and how to read, and for how long. Readers find titles which connect with the personal self.

Different categories of magazine, and within category different individual publications, serve different profiles of reader needs and motivations – some titles primarily giving practical advice, some focusing on emotional support or escapism, and so on. Whatever kind of person a consumer is, and whatever interests he or she has, there is a magazine which fits that combination of interests and motivations. This naturally leads towards a reader having an emotional attachment to those magazines which match his or her own personality and situation.

When a magazine closely chimes in with a reader's self-image there is a high level of

identification with the publication. There is a feeling of ownership, that this is 'my magazine', an informed friend, and that 'My magazine helps me to become the type of person I want to be'. Readers therefore have a powerful trusting relationship with their chosen magazines.

This is a universal truth about printed magazines, and it remains true after the arrival of the internet and other new digital platforms.

A range of emotional and behavioural consequences flow outwards from the central fact of this personal relationship which readers develop with their favourite magazines. Readers savour 'the magazine moment' – 'me time', a treasured, absorbing and usually relaxed experience. There is focused attention, issues are read thoroughly, considerable time is devoted to them, issues are typically picked up more than once, and many pages are re-visited. Since the reader is in physical control, everything that strikes a chord can be dwelt on for as long as desired.

Not everyone who reads a particular issue of a magazine reads it on the day it is published. Some readers see it on publication day, some first see it in the next few days, others in the following week, and for yet others it will be one or more weeks later when they first see it. Thus the full complement of readers of a printed magazine issue accumulates over a period of time, instead of occurring immediately and all at once. The rate at which new readers of an issue accumulate is similar from one country to another.

It is vital to take account of the rate of accumulation when planning the allocation of advertisements across a campaign, in order to control the week by week delivery of ad exposures. It is also essential to incorporate readership accumulation when modelling the post-campaign effectiveness of magazine advertising, otherwise the contribution of magazine media will be significantly under-valued.

CHAPTER 2**Impact of advertisements in print**

Magazines are unique in the extent to which the advertisements are welcomed by the audience. It's a virtuous circle. Readers choose magazines which match their own interests and outlook. Only those advertisers whose products fit in with a magazine's editorial content and audience choose to advertise there. Therefore the carefully selected ads are likely to be of interest to the readers. It's a perfect dating arrangement.

Put another way, relevance for readers means targeting for advertisers. Readers' process of selecting their magazines ensures the *relevance* of the magazine's contents to each reader, and from an advertiser's point of view, relevance of content means a *targeted* audience, with little 'wastage'. The targeting goes far beyond standard demographics, and can be defined in many other ways, including attitudes. Magazines segment consumers into like-minded groups, simply through the process of self-selection of one's own magazine.

Moreover in many markets magazines tend to target the most valuable customers – those who spend most, the enthusiasts.

Magazine advertising is perceived by readers to be relevant, appealing, inspirational, and useful in deciding what to do and buy. Consequently magazines are the one medium for which ad avoidance is not a problem. Nor are ad clutter or a high ad ratio a problem, uniquely among major media.

An advertisement will have the most impact

when the magazine, the advertisement and the reader are attuned to one another. Thus 'engaged' readers, who have strong ties to their magazines, are particularly receptive to advertisements.

For the average ad, 90% or more of readers are exposed to it, in the sense of eyes open in front of the page.

Advertisement noting is one of the most common measures of the impact of a magazine ad. It does not simply measure exposure to the ad (it under-estimates that); it measures not only exposure but also a degree of communication. Typically, around 50%-60% of an issue's readers 'note' (recall seeing) the average full page ad. Noting scores can show how this tends to vary according to size and position of the ad, by product category, and other factors. The greater a reader's interest in the product category, the greater the likelihood of recalling and receiving a communication from the ad.

Among those noting an ad, many are stimulated to take some kind of further action, such as discussing the product with someone, cutting out the ad, going online to look for more information, looking out for the product when visiting a shop, recommending the product to someone, thinking about purchase, buying it, simply feeling warmer towards the product, and so on.

Thus magazines have a major contribution to make in nudging consumers along their journey towards purchase – whether it is a magazines-only campaign or magazine media are used as part of a multi-media campaign.

CHAPTER 3**Creative formats for print advertising**

Creative and unusual formats and devices within magazines heighten impact, invite interaction, and increase involvement.

For example, double page spreads are more than just bigger spaces. They present a chance to talk to readers on their own without distraction, and to create a world of their own. The wide rectangular space is excellent for telling a story, including ads with a strong fantasy or aspirational element. The communication value of the larger space goes beyond the higher ad noting scores that they achieve. Gatefolds take this a stage further.

Unexpected use of special papers, unusual textures or materials, embossing, or other 'paper engineering' devices demand reader attention and invite a response. They present something tactile that readers feel they just have to touch and explore.

Samples, vouchers and gifts draw the reader closer to the advertiser. Gifts are warmly received and enhance the reader's perception of both the advertiser and the magazine. However they must be appropriate. Samples have the advantage over vouchers that the gratification is immediate. Samples are considered a natural thing for magazines to carry, they create goodwill, and they are part of the fun of a magazine.

Advertorials – sometimes known as advertisement features or branded content – enable the advertiser to don the mantle and sport

the values of the magazine itself. This intimacy brings added credibility to the brand, while readers appreciate the added value of having something extra for them to read. Advertorials encourage readers to take a closer look at the product, in a receptive and favourable frame of mind. Readers feel that the editor is there to represent their interests and ensure fair play; most think the editor has written or part-written the advertorials. Readers feel that the magazine has to some degree endorsed the products.

Fragrance strips heighten the impact of an ad, and increase reader's involvement and interactivity.

Technology is driving innovation in printed magazines at an unprecedented rate, with barcodes, augmented reality, watermarks and other emerging methods enabling publishers to make their printed pages more interactive, and to lead readers to new experiences on mobile devices. It is now possible for readers to watch a video, listen to an interview or song, or link to an e-commerce store, straight off the printed page, via a camera-equipped smartphone or tablet and an action symbol such as a QR code. Reader interaction can reach new heights.

CHAPTER 4

Consumers' use of magazines' digital formats

Websites and print are complementary.

Readers find it natural to use both platforms of

a magazine brand, looking for different kinds of information on each. Often the distinction lies in printed magazines being used for pleasurable relaxation and inspiration, and websites being used for targeted information-seeking and up to date news – though that is too simplified to be a complete description, and the situation is affected by the kind of magazine brand and its function as a printed title (for instance, practical versus entertainment).

If forced to choose just one format, most users of both prefer print to websites.

Readers of **digital editions** on mobile devices or PCs are a very desirable target audience for many advertisers: above-average incomes, well educated, and skewed towards the younger age groups.

A considerable time is spent reading digital magazines, and the issues are read thoroughly. Many consumers read them in a parallel way to their reading of printed magazines, in linear mode from front to back – contrasting with the quicker, more fragmented style of reading associated with websites.

Nevertheless tablets are beginning to change consumers' expectations of magazine content, and consumers are ready to explore more and have fun on the way. Publishers should provide content to surprise and delight.

Tablets are fun, and when a user has grown accustomed to a tablet the device becomes indispensable. Tablets also increase the total amount of magazine content that is consumed across all platforms.

The interactivity that digital editions can offer enhances readers' involvement, and enriches their reading experience. The more creatively interactive the content, the greater the engagement and satisfaction.

This does not mean that printed magazines will lose their appeal. Print will co-exist with digital formats. Among the reasons are the permanence of paper and all that flows from it; the sheer appeal of reading on paper; and its shareability.

The combination of websites, digital editions on various devices, and traditional print means that consumers have a very involving and entertaining range of magazine brand experiences available. It is the beginning of a golden age for readers – and for those publishers who learn to harness the new opportunities.

CHAPTER 5

Impact of ads in digital formats

On **websites**, as in printed magazines, trust is a key element. Original content websites (including magazine media websites) are more trusted than portals and social media websites, and they perform better in terms of affecting consumer attitudes and actions.

Trust in a print magazine brand rubs off onto the magazine's website, and this trust is a valid metric when measuring a campaign's success.

Not all display ads on websites are actually seen by consumers visiting the web page: 31% are not 'in view' at all.

Digital editions, whether apps or replicas of printed editions, attract very desirable target audiences for many advertisers: affluent, well educated, and skewed towards the young. They are also willing to pay significant sums to subscribe.

In digital editions consumers are receptive to advertising which is relevant to them. Many users agree that the ads typically provide more information than those in print, and users can focus their attention on the elements of most relevance, thus in effect customising the ad's content to their personal needs. Many feel that the digital ads are fun to engage and interact with. Consequently the ads are an important part of a digital edition's content.

Advertisements in digital replicas produce responses which are broadly similar to responses to ads in printed format. The in-app ads however provoke even more noting and action, largely because they tend to be more interactive, with an ability to provide greater additional information and entertainment. The more seamlessly the advertising is aligned with the editorial content the greater the chance of it grabbing attention and interest.

Consumers are intrigued and excited by ads which take advantage of capabilities and features unique to tablets - watching a video, entering a sweepstake, looking at pop-up recipes, games, animations, and so on. They look for advertising to invite them in, be relevant, immersive, interactive, and browsing-oriented. They are very open to brands communicating with them on

these devices within their trusted brands.

However the majority of tablet ads are still replicas of print ads, and do not take full advantage of the new possibilities offered by tablets' interactive facilities.

Early indications are that ads on tablets perform better than ads on the smaller screens of smartphones.

Magazine publishers are in a strong position to have an effective presence on **social media**, taking advantage of the strong personal relationships and trust which magazine brands create with their customers.

CHAPTER 6

Comparing mags and other media

All media have their strengths, and consequently it is a mix of several media which produces the most complete communication.

Some of magazines' strengths - compared with TV, internet, radio and newspapers - are to do with engagement and inspiration: factors such as involvement, self-recognition, stimulation, keeping readers informed of trends, enthusiasm, indulgence and enjoyment. Another kind of strength is practical use: new credible information, tips, and motivation to do something. The combination of inspiration together with practical assistance to put the inspiration into effect is a very positive one for advertisers.

All media are subject to multi-tasking to some extent: using other media, or doing

something else, at the same time. Magazines are least troubled by this and the distraction it implies. Moreover when magazines are used simultaneously with another medium, it is magazines which generally receive the prime focus of attention. The reason is understandable: it's in the nature of reading print that one has to focus on the words and images and apply at least a degree of attention. Reading is an active process that has to engage the brain. As the pages are turned they must be mentally scanned and a selection made of where attention will alight, and then the reading of articles or advertisements in depth requires similar focus.

Magazine readers have a much more positive attitude towards advertisements than users of other media. The intrusiveness of television and radio is a benefit to advertisers in many ways, but it frequently creates irritation among viewers. Moreover the commercials cannot be turned off in order to continue with the programmes; instead, in these linear media the audience must wait until the ads run their course before the programmes get under way again. It is the broadcasters who are in control, not the viewers or listeners.

With print media it is the readers who are in control. If they scan an advertisement and in a flash decide they don't wish to pay further attention to it, they can focus on something else on the page or turn to the next page. Instead of being a linear medium, print is an easy-access medium in which one can move forwards or backwards, repeatedly if desired, mentally

screening things in and screening things out. Thus the ads tend not to create irritation.

Moreover the targeted nature of the advertising carried by magazines means that most of the ads are of some interest and relevance to most readers, and far from being annoying many ads are positively welcomed by readers, and acted upon. Magazines are unique in that the advertising they carry is an acceptable and often welcomed part of the package - ideal conditions for building and retaining trust in the ads, and making readers receptive to the advertising.

In comparison with other media, magazines are effective in driving the audience to take action after seeing ads, including in persuading consumers to go online for further information, and generating recommendations and word of mouth communication.

At the centre of magazines' unique ability to communicate with, influence and motivate their readers lies the closeness of readers to their chosen magazine brands, and the position of magazines as centres of communities of like-minded individuals. The strengths that flow from this mean that there is a distinctive and valuable role for magazine media as part of a multi-media advertising campaign.

CHAPTER 7

Campaign effectiveness: magazine media on their own

There are many many case studies of successful advertising campaigns which have used magazines

on their own and proved that they have generated significant additional sales, and repaid the advertising investment several times over.

Multi-brand studies have shown magazine-only campaigns creating average sales uplifts of 10%-12%. Some of the brands have increased sales primarily through increasing the weight of purchase by existing customers, while for other brands the sales uplifts have mainly been through bringing new customers to the brand. The sales uplifts were also associated with increases market shares.

The average return on investment (ROI) was high, meaning that handsome profits were made.

CHAPTER 8

Campaign effectiveness: magazines in multi-media campaigns

One of the reasons why television, internet and magazines work well together is the synergy that occurs between these different forms of media. They work in different but complementary ways; each one not only delivers unique contributions but also enhances the performance of the other media. For example, magazine advertising helps consumers to take out more from the television advertising.

Within a multi-media campaign, magazines are effective in nudging consumers along their journey towards purchase, and this applies to all stages of the journey, from creating awareness to bonding emotionally with the product or service,

and making a purchase.

Statistical evidence is presented which demonstrates the powerful incremental effect of adding magazines to TV and online advertising. It shows magazines creating substantial incremental uplifts in:

- » brand awareness/familiarity
- » advertising awareness
- » message association
- » favourable attitudes to the brand
- » purchase intent

Generally speaking, the benefit of magazines was particularly strong as the measures came closer to the point of purchase.

Analyses have shown that, in campaigns where TV advertising is the main medium, magazine advertising adds substantial value:

- » among all major target audiences
- » in all product categories
- » for launches and small brands
- » for large brands

For launches and small brands, magazines were particularly valuable for increasing the visibility and awareness of the brand. For large brands where awareness is already very high, magazines were especially helpful in improving the richness and quality of the communication delivered by the campaign.

Moving from the stages leading to sales to sales themselves, TV combined with magazines outperforms TV used on its own. Adding

magazines to TV, or TV and online, for the same budget, lifts sales.

There is much evidence that advertisers frequently over-invest in television advertising, and that re-allocating a portion of the TV spend into magazines, or more magazines, would pay dividends by increasing sales.

Diminishing returns applies to media as well as to many other fields. It means that when campaigns spend nearly all the budget in TV, the last tranche of the TV money is likely to be yielding much lower returns than if that money was spent in magazines.

CHAPTER 9 Using econometric models to assess media effectiveness

Increasingly, advertisers' strategic media decisions are being guided by econometric modelling of a brand's historic performance data, to judge the effectiveness of each medium that was used.

Econometric modelling can be a great friend to magazine media. It can identify in a quantified form the best ways of using magazines for each specific advertiser. From this emerges statistical proof of the strengths and effectiveness of magazines. The results of modelling can help change attitudes towards magazine media, in a positive direction, showing in fresh ways the medium's power.

But to achieve this it is imperative that appropriate data on magazines is fed into the models. Unfortunately magazines are sometimes treated in a manner which puts the medium at an unwarranted disadvantage. Among several reasons, the biggest obstacle, unique to magazines, is that magazine exposures may be misallocated by the modeller. Magazines accumulate their readership over time, and different publications accumulate over different periods of time.

Though we know this, all too often it is easy for the modeller to overlook and assume for the

purposes for modelling that all readership or GRPs are attributed in the week in which the title is published (since at an aggregate level the GRPs are correct).

The result is that the week by week pattern of magazine exposures, as modelled, do not match the weekly pattern of sales or other KPIs – and thus the reported connection between sales and magazine advertising is much weaker than is the real case. It is estimated that this causes magazine ROI (return on investment) to be under-estimated by about a fifth on average.

It should be a priority for publishers to ensure media agencies and modellers are aware of the existence and importance of readership accumulation data, and make it simple (through software) to provide them with the relevant data.

Then the modellers will be much more likely to discover for themselves that magazine media have a powerful role to play in multi-media campaigns, and can yield impressively high returns on investment. ●

POSTSCRIPT "IT DOESN'T APPLY HERE." REALLY?

The argument that "It doesn't apply here, my country is different" is shown to be false. In a wide range of countries, covering many different situations in the media market and varied social scenes, the same conclusions emerge about magazines – about the way they are read, the targeting they achieve, and the influence they generate on the consumer's purchase journey. The characteristics and power of magazines are global. This means that in the absence of local information it would be reasonable to quote research from other countries when putting forward the case for magazine media.

1

Consumers' use of print

Readers choose magazines whose personalities and interests match their own. This creates an involved trusting relationship – like a friend. This means attentive, thorough and repeated reading.

Each magazine has its own personality

The magazine medium's essential strength lies in the active way in which readers choose and use their magazines, and thus find titles which connect with the personal self. Printed magazines are an active medium, for they call for the reader's active participation, with the reader fully in control of decision-making about what and how to read and for how long.

Different categories of magazine fulfil different needs, and therefore work in different ways, all of which are well adapted to the needs and interests of their particular readers. Similarly, within any given category of magazine (gardening, motor racing, cookery, etc), there are vital distinctions of character, focus and function between individual titles, giving each publication its own unique positioning.

This specialisation means that each magazine has its own personality and can get very close to the people with the specific attitudes and focus which the title offers.

Motivations for reading magazines

This is reflected in the range of motivations for reading magazines. A study in 2010 by *Carat's Consumer Connection System* in the UK [1] looked at 14 different motivations, among regular readers of magazines. The four most frequently mentioned motivations were 'to give me ideas', 'to learn things', 'to relax and unwind', and 'the content suits my tastes and interests.'

Figure 1 ranks all 14 motivations. It underlines what a wide range of motivations exist, ranging from the practical to the emotional and indulgent.

An equally striking thing about the results was the variations by gender, sex and other consumer characteristics. A further factor is that different categories of magazine, and within category different individual publications, serve different profiles of reader needs and motivations – some titles primarily giving practical advice, some focusing on emotional support or escapism, and so on. Taking these two things together – great

variation in motivations among consumers, and great variation in the offerings by publishers – brings us to the same conclusion as before: that whatever kind of person a consumer is, and whatever interests he or she has, there is a magazine which fits that combination of interests and motivations. This naturally leads towards a reader having an emotional attachment to a magazine which matches his or her own personality and situation.

A personal relationship between reader and magazine

The process of choosing magazines whose personalities suit or complement one's own is similar to the way one chooses friends. Indeed, in focus groups readers sometimes describe their favourite magazines as "a friend".

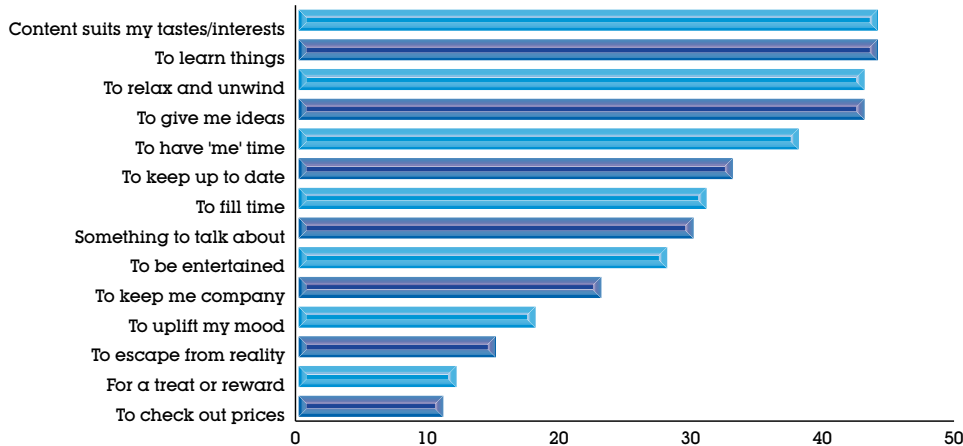
It is nothing new to say that when a magazine's personality matches a reader's personality, a close relationship develops. It's always been in the nature of magazine

"I COME OUT OF READING
COSMOPOLITAN FEELING
A DIFFERENT PERSON THAN
WHEN I COME OUT OF
READING PRIMA."

Focus group respondent

Fig 1. MOTIVATIONS FOR READING MAGAZINES, AMONG REGULAR READERS

% claiming each motivation



Source: Carat Consumer Connection System, UK, 2010

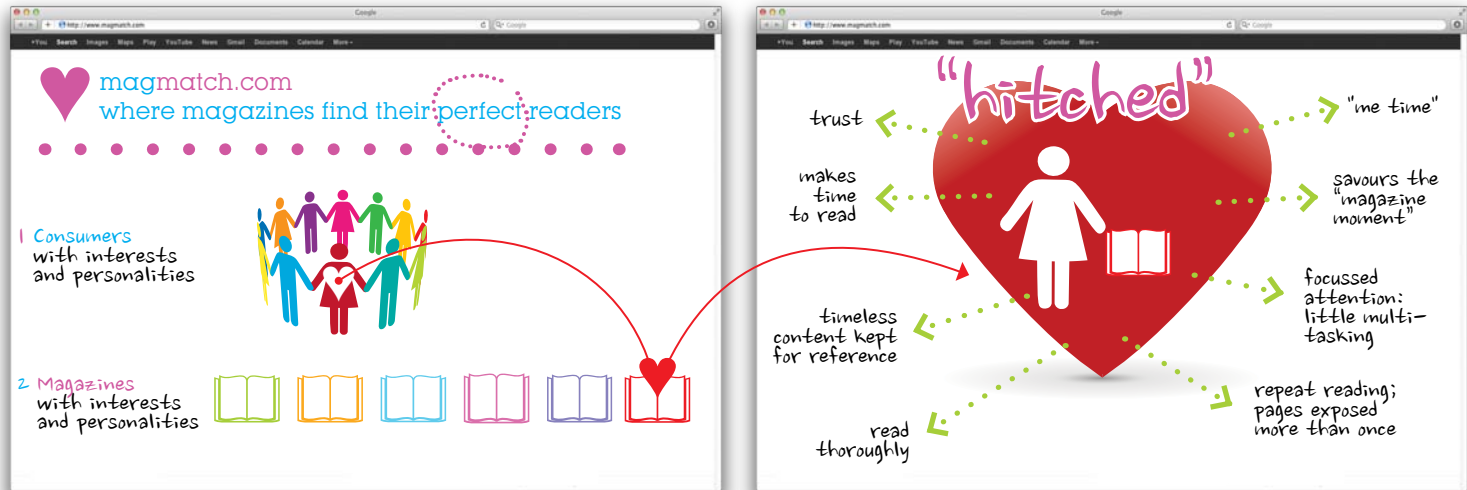
reading. It was particularly well expressed in the National Magazine Company's qualitative study *The Readers' Perspective* back in 1994 in the UK [2]. The study interviewed readers of eight of the National Magazine Company's titles. Readers' attitudes to their chosen magazine were summed up in this way:

1. The reader has his or her own perception of what type of person he or she wishes to be.
2. When a magazine closely chimes in with this self-image there is a high level of identification with the chosen magazine. There is a feeling of ownership, that this is 'my magazine', an informed friend.
3. There grows a sense that 'My magazine helps me to become the type of person I want to be'. Magazines are thus aspirational, enabling.
4. The reader feels 'I therefore have a powerful trusting relationship with my magazine'.

This was voiced at the time by one advertising agency in the following words: "The most

Fig 2. **MATCHMAKERS**

How magazines and readers discover a certain chemistry



The 'magazine moment'

The *Absorbing Media* study published by the PPA (Professional Publishers Association) in the UK [6] described the typical magazine reading experience as 'the magazine moment'. The report stated "The magazine moment was described warmly and positively by all respondents. It was treasured, as a break from work/housework/

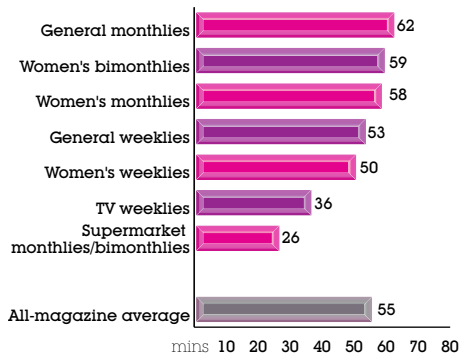
homework/etc, a totally different activity which transported the readers from their everyday situation... sometimes into other people's lives (as with *Hello!* magazine) or into a dream life of their own, for example by reading do-it-yourself or travel magazines. It was generally an intensely personal moment. The reader was utterly absorbed in the magazine. Demands on one's

time could be forgotten for a while.

"The magazine moment often took place in relaxed places. Although the reader was often alone, in a private place, this was not always the case. The magazine itself could be sufficient to create a private 'bubble' that protected the reader from intrusion.

"Women with children in particular appreciated

Fig 3. AVG. TIME SPENT READING (UK)



Based on adults, except women's titles, based on women
Source: National Readership Survey, UK, Oct 2010-Sept 2011

the fact that their relationship with magazines was like an unconditional friendship. The magazine would always be there when they had a moment, to talk to them for as long as they could spare.

"Magazines 'feed' the reader, and respondents 'devour' their favourite magazines. They treasured buying them, taking them home to read as a treat, combined with other relaxing pleasurable activities – some even claimed to read their magazines in the bath. The satisfaction obtained was analogous to eating a favourite food."

Connecting with the personal self

"Connecting with the personal self" was identified as one of the key roles of magazines, in

the *Magazine Experiences Europe* study published in 2008 by *Time* and *Fortune* magazines [7]. The survey was conducted among adults in **France, UK and Germany**. There were a variety of ways in which the connection with the personal self was demonstrated:

- » 68% of consumers said they are alone when reading a magazine (compared to only 24% for watching TV, a more social/family experience)
- » 52% agreed with the statement 'My choice of magazines says something about the kind of person I am.'
- » 57% said 'There are always magazines in my house.'
- » 34% of consumers set aside a 'special time' for reading magazines. It is a 'me time' medium.
- » 22% described their magazine reading experience as being 'Like a gift to myself'.

The study found that the personal relationship is deepened through magazines' role as a source of knowledge and learning. Magazines attracted high scores for agreement with statements like 'Magazines help me learn new things' and 'Magazines inform me of news and events'.

A companion study from Time Inc, this time in the **USA**, called *The Magazine Experience Study* [8], similarly concluded that magazines meet a range of emotional and rational needs. There is the pleasurable anticipation of a magazine's availability, whether through the post or from a bookstall. There's "the joy of discovery" of what a new issue contains, and the rewards of picking up the issue a number of times.

The survey emphasised that magazines are described in pleasure terms. Their portability and tactile qualities are key components of that pleasure. Readers feel in control of their reading. Magazines have a high social currency value. They help define "who I am".

Trust and 'me time'

The involvement between readers and their chosen magazines creates trust in the magazine's contents. The *AdSense* study by IPC Media in the **UK** in 2012 [9] concluded "Trust in magazines is grounded in providing personally targeted, impartial information which is accurately researched. Magazines are an 'appointment to view' medium which offers valuable 'me time'". Copies tend to be read as a treat, when relaxing, and for taking a break. Readers are in a receptive mood – receptive to all the contents of the magazine, including the advertising.

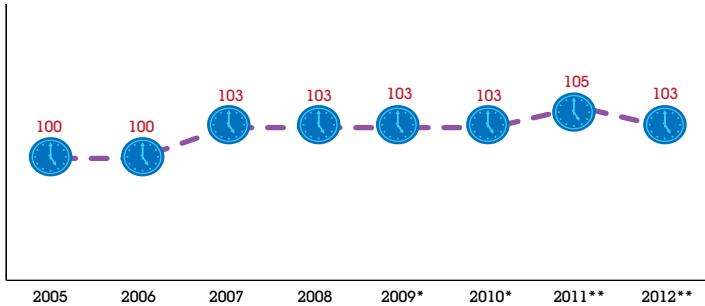
Time spent reading

The emotional side of involvement with a magazine leads to observable behaviour, such as intensive reading. The total length of time spent reading is considerable.

In the **Czech Republic**, for example, consumers spend an average of 4 hours 42 minutes per week reading all their magazines, according to the *Magazine Advertising Study* by the Czech Publishers Association/Millward Brown, 2010 [10]. This rises to 6 hours 10 minutes when the magazines' online versions are added.

Fig 4. TIME SPENT READING REMAINS STABLE (CANADA)

Average minutes per issue (indexed on 2005)



Source: Print Measurement Bureau (PMB) Canada. *Fall **Spring

The UK's *National Readership Survey* [11] is one of the surveys which measure time spent reading for every individual publication it covers. Examples of group averages for 2011 are shown in Figure 3.

Has the time spent reading magazines been reduced by the growing use of websites, smartphones, laptops, tablets and other digital media over the last seven years? The answer is no. In Canada the *Print Measurement Bureau (PMB) Readership Survey* [12] shows that reading time for the average magazine has not diminished at all during the period 2005 to 2012 (Figure 4).

The PMB also measures 'average degree of interest', on a 10 point scale, across all measured

titles. This too has remained very constant from 2005 to 2012 (Figure 5).

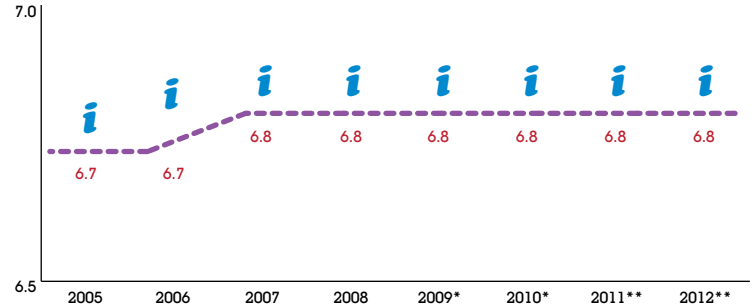
Repeat reading

One of the unique strengths of printed publications is that they can be picked up and read on multiple occasions.

This was well illustrated in Germany by the *Ad Impact Monitor (AIM)* research programme running from 2009 through into 2012 [13]. The programme, initiated by VDZ the national magazine association, and currently run by a new umbrella organisation including advertisers and media agencies, involves three elements: ad tracking, brand tracking, and an *RFID Contact*

Fig 5. READER INTEREST SCORES REMAIN STABLE (CANADA)

Average reader interest score Scale: 1 (low) to 10 (high)



Source: Print Measurement Bureau (PMB) Canada. *Fall **Spring

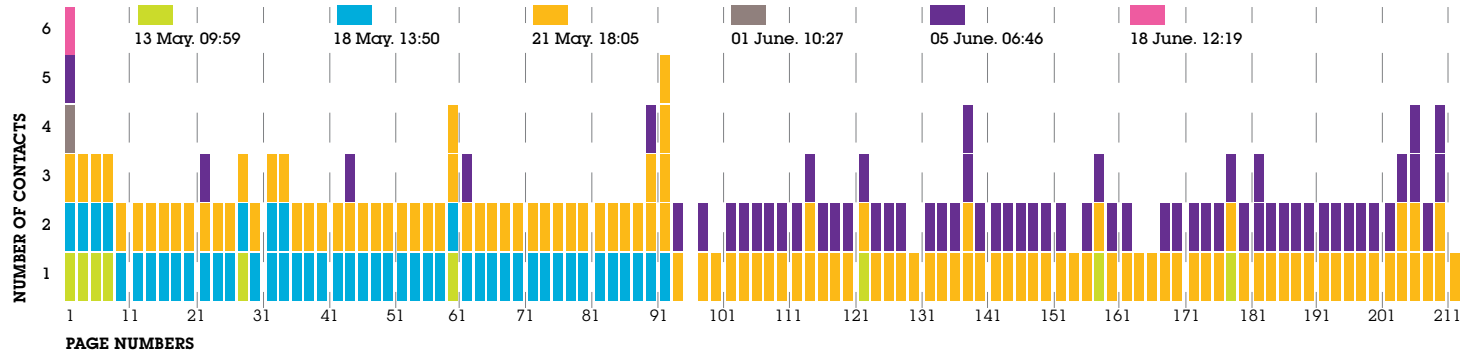
Study. The *RFID Contact Study*, using passive measurement of the day by day reading of magazines, was able to establish which pages of selected magazines were read, when, and for how long. This means it was possible to study an individual reader's whole reading pattern of a particular issue of a magazine.

For example, a 38 year old woman read the June 2009 issue of *Vogue*. She read it on six occasions:

- » 13 May from 09:59 in the morning
- » 18 May from 13:50
- » 21 May from 18:05
- » 1 June from 10:27
- » 5 June from 06:46
- » 18 June from 12:19

Fig 6. READING PATTERN FOR GERMAN VOGUE

June 2009 issue – 38 year old woman



Source: AIM RFID Contact Study, 2009-2011, Germany

In the course of those six occasions 210 of the 212 pages of that issue were read at least once; only two pages were not opened at all. Nearly all pages were opened on at least two occasions, and some pages exceeded that – as Figure 6 shows.

On 13 May the woman looked at the first few pages, and sampled a few others. On 18 May she had a very thorough look through the first half of the magazine. During 21 May in the evening she had an intense read, opening almost every page in the book, and opening a few of the pages twice or even four times. On 1 and 18 June she only picked up and looked at the front cover, but on 5 June

she enjoyed a very thorough read of the second half of the magazine, seeing some of the pages more than once, and she also looked at a handful of pages in the front half of the publication.

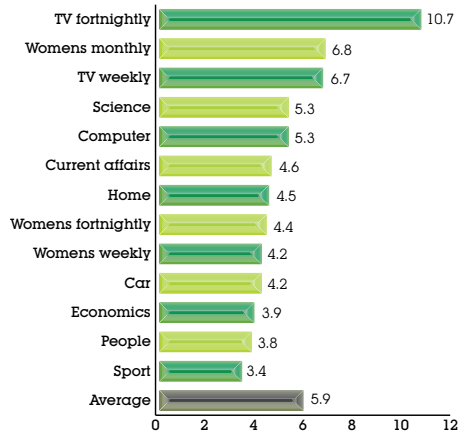
This illustrates in a striking way how every page, including every advertisement, can deliver several exposures to the same reader.

The RFID study found that on average each issue was picked up 5.9 times. The number varied by category of magazine, as Figure 7 shows. Publications with a strong reference function such as TV magazines had particularly high pick-ups per issue.

The average two-page spread was looked at 1.88 times. If the spread included an advertisement it made little difference: the spread was still looked at 1.80 times.

Some estimates have put the page contact figure even higher than Germany's 1.8. In the UK, using a different measurement technique, the average Page EXposure score (PEX) was calculated as 2.5, according to the *Quality of Reading Survey (QRS)* [14]. There were variations by individual magazine and by genre of magazine. For the average motoring monthly featuring performance cars, each page was

Fig 7. AVERAGE OF SIX READING OCCASIONS FOR EACH ISSUE
Average number of reading occasions per reader, by category of magazine



Source: AIM RFID Contact Study, 2009-2011, Germany

exposed 4.9 times, whereas for the average classified advertising weekly each page was looked at only 1.7 times.

The QRS also established that paid-for magazines were picked up an average of 5.4 times – not very different from the 5.9 in **Germany**.

In the **Czech Republic** a similar situation to **Germany** and the **UK** was found. The *Magazine*

PANEL 2
EASY FOOD COOKERY MAGAZINE

Easy Food magazine in **Ireland**, published by Zahra Publishing, is written for budget-conscious nutritionally-aware busy home cooks who want quick and easy recipes. Its quantitative reader survey (15) showed that the magazine provided emotional support, creating inspiration and confidence, and solving the problem of what to provide for the family day after day while ensuring it is nutritionally balanced:

▶▶ 99% of readers agreed “*Easy Food* provides inspiring meal ideas for my family and myself”

▶▶ 94% agreed “Following a recipe’s instructions gives me confidence”

▶▶ 62% agreed “I find it difficult to come up with ideas of what to cook for myself/my family every day”

▶▶ 89% agreed “I’m concerned about eating a nutritionally balanced diet”

Consequently, readers are prepared to take action: 99% agreed “I intend to cook something from *Easy Food*” and 71% agreed “If I see a new kind of food I will try it”. 49% of readers keep their issues for reference.



Advertising Study conducted by Millward Brown for the Czech Publishers Association [10] found that 85% of magazine readers pick up and read a copy more than once, and 63% several times.

The repeat reading of magazine issues, resulting in multiple exposures for the ads they carry, is one contributory factor in explaining why magazines are shown – later in this book – to be such an effective advertising medium. And repeat reading is a phenomenon that surely exists in every country.

Keeping copies for reference

Those magazines containing substantial timeless contents are liable to be kept by readers for a long time. Taking the **Irish** cookery magazine *Easy Food* as an example (Panel 2), its 2008 reader study [15] showed that 49% of readers keep the issues after reading them, in order to refer back to them later.

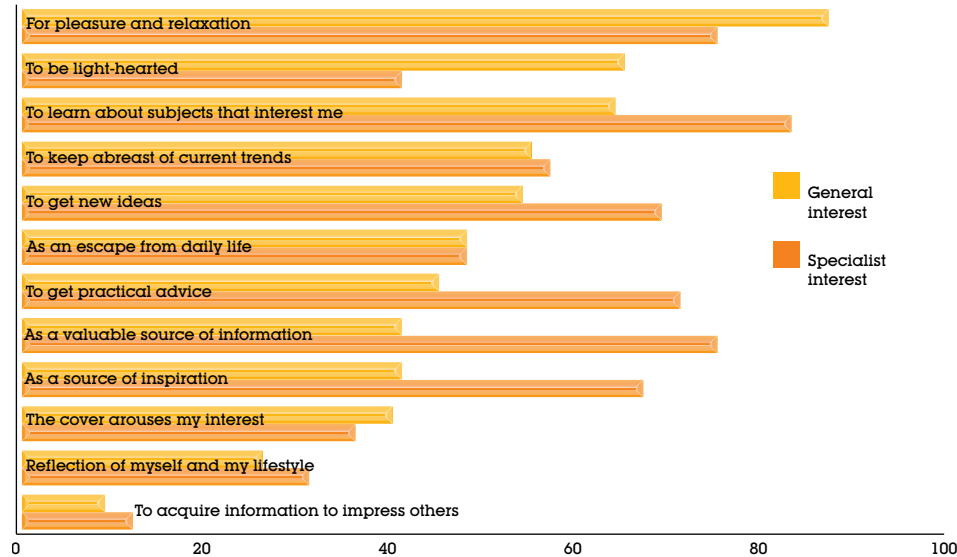
Similarly the *Magazine Engagement Study* in the **Netherlands**, published by the NUV Dutch Publishers Association in collaboration with Starcom Netherlands [16], found that 56% of readers of specialist magazines save issues for reference.

Specialist and general magazines

There are some distinctions to be made between specialist magazines which deal with a specific topic, such as motoring, cookery, gardening, science and so on; and general magazines which cover a much wider range of topics.

Fig 8. REASONS FOR READING SPECIALIST AND GENERAL MAGAZINES

"I frequently read this magazine for ..."



Source: Magazine Engagement Study, NUV Dutch Publishers Association, 2007. Base: women

In the **Netherlands** the *Magazine Engagement Study* [16] quantified some of the differences (Figure 8).

Specialist interest magazines serve a rather different function from general interest magazines, among women. The general interest

titles are more oriented towards recreational roles, such as relaxation, pleasure and light-heartedness, whereas the specialist titles are more oriented towards seeking new ideas and information, and practical inspiration and advice. Of course, both categories of magazine fulfil all of

these functions to some degree.

This distinction is another viewpoint onto the way in which the medium has evolved into a variety of function-based and emotion-based publications, to the extent that consumers can find titles which closely match their own outlook on life as well as their interests.

Readership accumulation

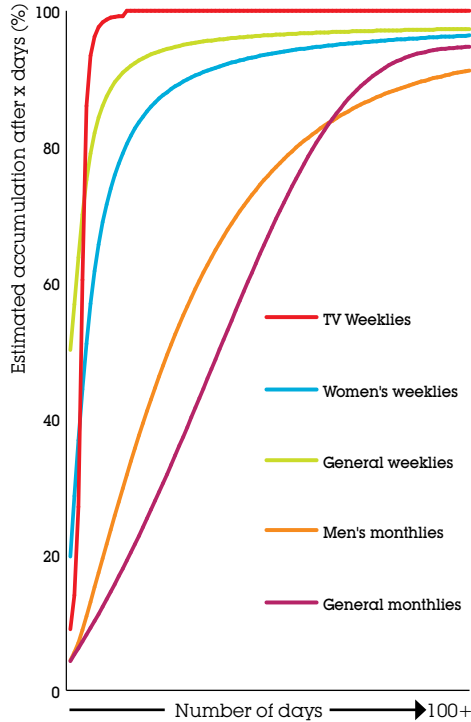
Not everyone who reads a specific issue of a magazine reads it on the day it is published. Some readers see it on publication day, some first see it in the next few days, others in the following week, and for yet others it will be one or more weeks later when they first see it. Thus the full complement of readers of a printed magazine issue accumulates over a period of time, instead of occurring immediately and all at once.

Several factors influence the speed at which the total readers of an issue builds up. The most obvious is its publication frequency: a typical weekly accumulates new readers of an issue faster than a typical monthly. Other factors include the predominant distribution method (e.g. subscriptions versus single copy sales); how time-critical the editorial content is; how appealing the magazine is to pass-on readers; and even the physical robustness of the magazine.

The rate of accumulation has been measured in several countries. An example is the **UK**, where the *National Readership Survey (NRS)* commissioned its own *Readership Accumulation Study* [17]. Every magazine and newspaper whose

Fig 9. READERSHIP ACCUMULATION

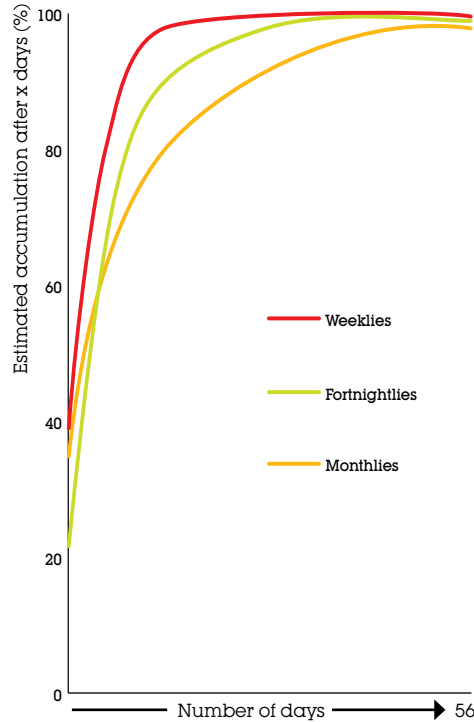
UK



Source: NRS Readership Accumulation Survey, UK, 2004

Fig 10. READERSHIP ACCUMULATION

Germany



Source: AIM RFID Contact Study, 2009-2011, Germany

readership was measured in the NRS was given its own accumulation curve – that is, about 230 curves were published. In addition, summary curves for 25 publication groups were created. Figure 9 shows some examples.

Although these curves were measured several years ago, there's no reason to suppose that the timing pattern in which a reader first encounters an issue of a magazine will have changed significantly.

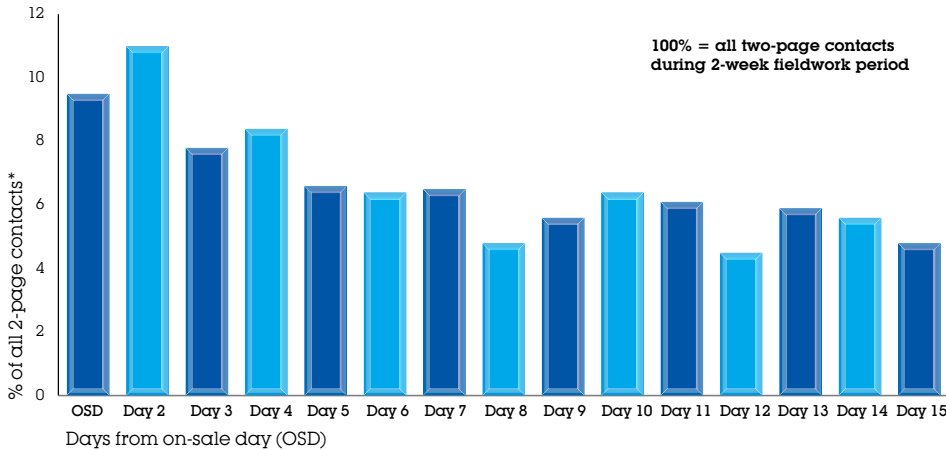
Moreover there is a very strong similarity between the UK curves and those from several other countries. Even two countries which have different balances of circulation methods have look-alike accumulation curves - namely the UK whose circulations are predominantly through single copy sales and the USA where the magazine market is predominantly based on subscriptions.

In Germany the accumulation curves derived from the RFID study are very similar in shape to those in the USA and UK. The RFID study is part of the *Ad Impact Monitor (AIM)* programme discussed earlier. By passively measuring every time a respondent picked up a copy of a magazine that was being measured, it was possible to plot the rate of accumulation of new readers of a given issue. Three sample curves are shown in Figure 10: for weeklies, fortnightlies and monthlies.

We can be confident that a broadly comparable pattern exists in almost all other countries, and therefore it would be reasonable for any country without its own accumulation study to adopt a set of curves based on one or more of those countries which do have such a study. Approximate as it

Fig 11. CONTINUOUS BUILD-UP OF EXPOSURES THROUGH TIME

Taking account of multiple reading occasions: weekly magazines



Base: 290,299 two-page contacts; aggregated average of 24 weekly magazines

Source: AIM RFID Contact Study, 2009-2011, Germany. *including second & subsequent reading occasions

may be, better than to work on the implicit assumption that all reading of an issue occurs on the day the issue first goes on sale.

The concept of accumulation is vital when planning the allocation of ads across a campaign, in order to control the week by week delivery of ad exposures. It is also essential when modelling the post-campaign effectiveness of magazine advertising. To evaluate a magazine campaign

on the (sometimes unwitting) assumption that all the exposures generated by an issue can be allocated to the week the issue is published is to significantly undervalue the campaign. Instead, it is necessary for the model to distribute the exposures through time in line with the pattern described by readership accumulation studies, in order to correctly align (say) weekly exposures with the weekly pattern of sales or other criterion.

The readership accumulation curves are based on readers' first exposure to an issue. The curves thereby ignore all a reader's subsequent repeat exposures to the same issue. An analysis of data from the AIM RFID Contact Study in Germany, based on 24 weekly magazines, takes all the multiple exposures into account, and shows how exposure to double-page spreads builds up during the first two weeks. Figure 11 reveals the pattern for an average issue of a weekly magazine.

Among all contacts (including the repeat contacts) with double-page spreads (and the ads on them), about 20% occur in the first two days, while 80% of exposures occur in the next 13 days. Even Days 13 and 14 are each contributing almost 6% of the fortnight's exposures. In addition further exposures (not measured by the RFID study) will occur from Day 16 onwards, forming a long tail, and perhaps adding a tenth or fifth to the total contacts.

For advertisers, two major conclusions are underlined by this analysis:

- >> Second and subsequent exposures to a typical double-page spread contribute heavily to the total impact of a magazine advertising campaign, and should be taken into account when planning campaigns and modelling post-campaign performances.
- >> The continuous build-up of exposures through time means that a magazine advertising campaign continues to work for a substantial period after the issues come on sale. ●

2

Impact of advertisements in print

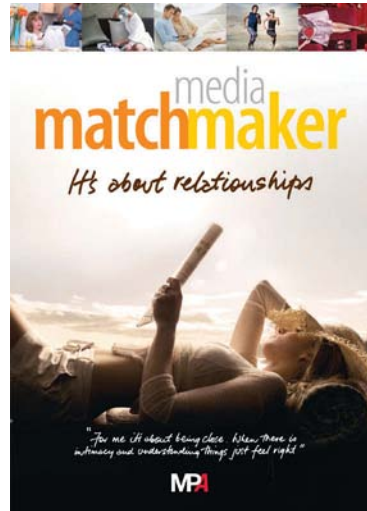
Advertisements in printed magazines are a valued part of their contents, because readers have chosen their magazines, and so have the advertisers. It's the perfect dating arrangement. Readers notice and take action after seeing relevant ads.

In an often-quoted piece of research, the media agency Starcom in the **USA** [18] asked consumers to tear out from their favourite magazines ten pages which between them represented the essence of the magazines. On average three of the ten pages were advertisements. This is a striking illustration that readers appreciate the advertisements in magazines as being a useful part of the package.

This chapter examines the impact of print magazine advertisements in isolation. Chapter 5 looks at digital magazine advertisements, and Chapters 7-9 examine magazine media advertising in the context of complete campaigns.

Ads are part of the desired magazine content

Magazines are unique in the extent to which the advertisements are welcomed by the audience. It's a virtuous circle. Readers choose magazines



which match their own interests and outlook. Only those advertisers whose products fit in with a magazine's editorial content and audience choose to advertise there. Therefore the carefully selected ads are likely to be of interest to the readers. It's a perfect dating arrangement.

This was illustrated by the **Australian** study *Media Matchmaker: It's About Relationships*, (left) published by Magazine Publishers of Australia in 2007 [19]. It showed that magazine advertising is perceived to be relevant, appealing and useful in deciding what to buy. It is the one medium for which ad avoidance is not a problem. The

"MAGAZINE ADVERTISING IS TARGETED TO YOU – NOT AN INTERRUPTION LIKE TV"

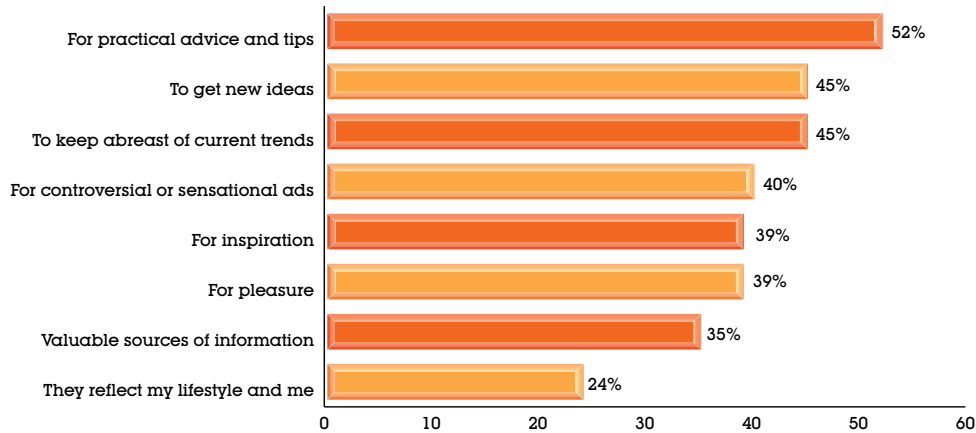
Respondent in Media Matchmaker, Australia

"A MAGAZINE'S POWER RESTS IN THE FACT THAT THE READER TAKES THE TIME TO READ AND IS FOCUSING ON THE MAGAZINE. IT IS NOT ONLY 'YOUR MOMENT', BUT ALSO THE MOMENT FOR THE ADVERTISER. THIS IS AN OPPORTUNITY FOR AN ADVERTISER TO HAVE AN EXCLUSIVE ENCOUNTER WITH CONSUMERS."

Report on Magazine Engagement Study, The Netherlands

Fig 12. I READ ADVERTISEMENTS FOR/BECAUSE:

% of all readers who agree



Source: Magazine Engagement Study, NUV Dutch Publishers Association, The Netherlands, 2007

quantitative study captured this by showing a list of statements and asking respondents to say for each statement which of the six media, if any, they thought the statement applied to. Magazines scored highest on the following statements while the other five media achieved much lower figures:

- “The advertising is usually appealing and attractive”:
 - 58% of magazine readers agreed
 - Next highest: 36% of free TV viewers
- “The ads contain useful product information”:
 - 50% of magazine readers agreed
 - Next highest: 41% of newspaper readers
- “The ads are helpful in deciding what to buy”:
 - 46% of magazine consumers
 - Next highest: 37% of newspaper consumers.
- “The ads here are more relevant to me”:
 - 44% for magazines
 - Next highest: 30% for newspapers
- “I like this medium to carry advertising”:
 - 41% for magazines
 - Next highest: 36% for newspapers

Conversely, magazines scored lowest on statements that were negative about advertising:

- “I avoid the ads if I can”:
 - 67% of free TV viewers agreed, but only 19% of magazine readers, the lowest score of any of the six media
- “The ads annoy me”:
 - 76% of free TV viewers agreed, but only 14%

of magazine readers – again the lowest score, this time equal with newspapers

The *Magazine Engagement Study*, published in 2007 by NUV Dutch Publishers Association in the Netherlands [20], investigated readers' reasons for reading advertisements. Prominent themes were practical advice, information, and new ideas; and pleasure and inspiration (Figure 12).

The survey confirmed that an advertisement will have the most impact when the magazine, the advertisement and the reader are attuned to one another. Thus readers who have strong ties to their magazines are particularly receptive to advertisements. 'Engaged' readers – defined here as those who said they read the magazine from cover to cover and would miss it if it were no longer available – consistently scored even higher than total readers. 75% of engaged readers reported that, after reading an advertisement, they had visited the shop or website. 66% said that, after reading an advertisement, they had been persuaded to buy a product or try a new service.

Relevance for readers means targeting for advertisers

To summarise in a slightly different way, targeting is a basic strength of the magazine medium, and it provides advertisers with an audience tailor-made for information about suitable products. We have seen that readers' process of selection of their magazines ensures the *relevance* of the magazine's contents to each reader, and from an

advertiser's point of view, relevance of content means a *targeted* audience.

The targeting goes far beyond standard demographics, and can be defined in many other ways, including attitudes. Magazines segment consumers into like-minded groups, simply through the process of self-selection of one's own magazine.

Because their audiences are targeted, magazine readerships contain little 'waste' of people who are not within a relevant advertiser's target market. At its simplest, a car advertiser using a motoring magazine can be sure that all readers of the magazine are interested in the sort of cars featured in the magazine.

Moreover in many markets magazines tend to target the most valuable customers – those who spend most. Within any market, some consumers are more enthusiastic and passionate about the subject than other customers in the same market. It is these enthusiasts who are most likely to be reading magazines about the topic, and spending money in the market.

"THE PRODUCTION QUALITY THAT YOU GET FROM MAGAZINES CAN BE SECOND TO NONE IN SHOWING OFF A PRODUCT IN ITS BEST LIGHT."

Jim Jarrett, Business Director, Business Planning, Mindshare UK

Consequently magazine readers tend to be more knowledgeable and to spend more. Their product knowledge, combined with their enthusiasm for the topic which makes them eager to talk to other people, makes them influential in other people's purchasing decisions too.

Ad noting: what it is measuring

Involvement with advertising is a largely subconscious process in which consumers relate advertising messages to their own interests, thoughts and associations. If such matches are made with a particular ad, the ad acquires personal relevance, which reinforces its persuasive power. The effect is considerably stronger when the reader feels emotionally involved with the magazine carrying the ad.

This must be borne in mind when studying data on recall of advertisements. A reader's perception of and remembrance of an ad is filtered through these connections and associations.

The measurement of ad noting is essentially based on showing a sample of readers a copy of the issue they have read, and asking them to go through the issue page by page and stating what they can remember having looked at previously.

The level of the scores is dependent on the form of the question asked. A question which asks whether or not the reader 'looked at' the advertisement is likely to produce lower scores than a question which distinguishes between (a) just glancing at it and moving on to something else, and

(b) actually reading something in the ad.

This is because most respondents can't believe interviewers count casual screening-out of advertisements as 'looking at' the ads (even supposing they remember doing so), so they don't claim such glancing unless specifically asked about it. It can make a big difference to the scores.

Chapter 1 described how, in the *AIM RFID Contact Study* commissioned in **Germany** by the Verband Deutscher Zeitschriftenverleger (VDZ) [13], the example reader of *Vogue* had opened 210 of the 212 pages in the issue – giving an average page exposure score of 99%. Yet it is extremely unlikely that this reader would subsequently claim, in a typical ad noting interview, to have seen every advertisement in the book except those (if any) on the two missed pages.

The *RFID Contact Study* updates and endorses the findings of a number of old but still relevant studies in the **UK**. The *NRS Reader Categorisation Study* [21] distinguished between "saw and read something" on the page and "saw but just glanced at" the page. Combining both types of

"WHEN YOU BUY A COPY OF VOGUE, YOU EXPECT TO SEE FANTASTIC ADVERTS FOR FANTASTIC BAGS AND SHOES. IT IS PART OF THE EXPERIENCE."

Respondent, Media Experience Survey 2012, The Netherlands

Fig 13. TYPICAL AD NOTING / IMPACT SCORES

	Ad noting	Brand noting*	Action taken*
2-page spread	55-65%	85-90%	50-60%
Full page	50-60%	85-90%	50-60%
Half page	45-50%	80-85%	50-60%

**Based on those noting the ad. Source: Guy Consterdine, based on norms in several countries*

exposure yielded average page traffic scores of 90% or more, against much lower conventional page traffic scores. Similarly, in one traffic and noting study conducted by Gallup [22], informants who failed to claim to have looked at selected advertisements were asked what they thought the reason for not looking was. This established that the great majority of non-noters had in fact looked at the advertisements but had not originally claimed to have noted them because they had not felt interested in them - often because the product was not relevant. These readers had perceived the ads in order to subconsciously decide not to study them. For one of the ads studied, the noting score was only 34%, but 80% of informants could recall having actually looked at it when asked why they hadn't claimed to have noted it.

Page traffic and ad noting data are clearly not measuring total exposure but communication of some sort. The scores are reflecting interest and

involvement in the subject matter of the article or advertisement. Selective perception is at work.

Thus ad noting scores are underestimates of eyeballs open in front of ads; instead they are 'qualified' exposure, filtering out those readers for whom the ad left no conscious memory of seeing. Noting scores are a valuable measure of communication, not a measure of total ad exposure.

Ad noting: some results

There are many services offering print advertisement noting and impact measurements, and although there are some variations in methodology, and these services operate in a range of countries, most use online interviewing and yield broadly similar results. Based on large samples of four-colour ads, typical average values, or norms, by size of advertisement are shown in Figure 13.

Special positions record rather higher norms. For example, ad noting of back covers shows an uplift of around 10-20% on average.

In studying or using such scores, bear in mind that they measure communication - and not total exposure (eyes open in front of the page) which typically exceeds 90% for the average page.

Further insights have been provided by the *Magnify* study in the **UK**, commissioned by the PPA (Professional Publishers Association) and published in December 2011 [23]. It was an advertisement impact survey conducted by GfK, using the methodology employed by sister company GfK MRI Starch in the USA.

Fig 14. MAGAZINES AS DRIVERS OF BEHAVIOUR ON CONSUMER JOURNEY

	Editorial article	Ad
Noting score	54%	54%
Read any of content	50%	45%
Read most of content	33%	25%
Information gathering:		
Used for ideas	18%	
Gathered more info after seeing article/ad	13%	18%
Visited brand website	11%	16%
Cut it out	7%	7%
Impact actions:		
Discussed/referred it to someone	19%	
Passed to someone	13%	
Have a more favourable opinion of product		19%
Recommended the product		14%
Consideration and purchase:		
Considering purchase	12%	22%
Purchased	4%	9%
Net action score	66%	63%

Source: Magnify, PPA, 2011, UK

Magnify compared the impact of editorial articles as well as advertisements. It found that the average noting scores were the same for both (Figure 14). For ads to be recalled as much as the articles indicates that magazines are a very hospitable environment for advertising.

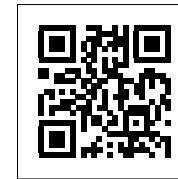
Reading some or all of the content was higher for editorial, but action taken after reading tended to be stronger for the advertisements. For example, higher proportions of ad noters gathered more information and visited websites, and considered making a purchase, than article noters. The net action score, combining all actions listed on the questionnaire, was similar for editorial and advertising, on average. Of course most editorial articles do not call for any action, but the comparison does show a substantial degree of active involvement in the advertising by readers.

Looking more deeply at the ad impact data, the *Magnify* study found that not all product categories perform equally, and that relative performances vary considerably according to the measure looked at. The differences reflected inherent interest in the product category (some are of wider interest than others), frequency of purchase (for example, cars versus food), and other factors.

Magnify's overall conclusion was that the readers' attention to the advertising, and the presentation of the advertising in the hospitable environment of a magazine, leads to engagement with the ad, which in turn helps drive familiarity

with the product, information-gathering about it, purchase consideration, and buying. Thus magazines have a major contribution to make in nudging consumers along their journey towards purchase – whether it is a magazines-only campaign or magazine media are used as part of a multi-media campaign.

PPA has created a short video which summarises *Magnify's* results.



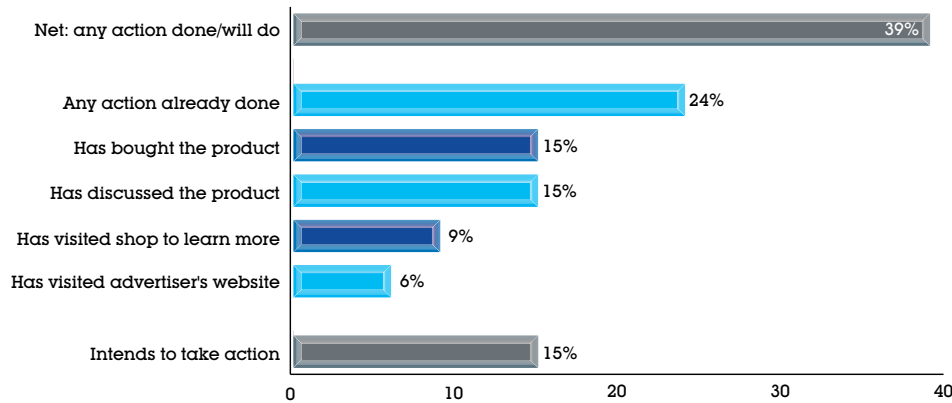
Magnify video

Beyond ad noting: actions stimulated by seeing print ads

The PPA's *Magnify* is one of many pieces of research from around the world which, in measuring ad impact, have gone beyond ad noting and measured actions of some kind which were stimulated by seeing print ads.

Another example is a series of studies in **Finland** conducted for Sanoma Media, Finland, based on the *Sanoma ABC Database*, 2009-2010 [24]. Female subscribers to Sanoma's women's magazines (subscribers form the majority of readers) were interviewed to establish their awareness of and reactions to the ads in the magazines.

Fig 15. FINLAND: SUBSCRIBERS' REACTIONS TO INDIVIDUAL ADVERTISEMENTS



Base: female subscribers who noted the ad
Source: Sanoma Media Finland's ABC Database 2009-2010

The average ad noting score was 52% - very similar to the *Magnify* figure of 54%. 90% of subscribers said they had taken action of some sort in response to an ad in their magazine. What was particularly impressive was the reaction to individual advertisements. On average, 39% of those who had noted a specific ad said they had taken or intended to take some form of action as a result of seeing that ad. Figure 15 gives more details, and shows that magazine ads drive readers to act.

A study in **Indonesia** by the Femina Group in 2010 examined three of the group's magazines. The survey, called *Ad Buzz For Brands Advertised In Magazines* [25], interviewed readers of *Femina* (written for women aged 24-35), *Gadis* (for girls aged 13-17), and *Ayahbunda* (a mother-and-baby title). For each magazine one advertisement was researched among readers. As well as high levels of ad recall, it was found that 40% of *Femina* readers, 65% of *Gadis* readers and 25% of *Ayahbunda* readers had discussed the ad

or product with other people. For *Femina* and *Ayahbunda* it averaged around 2-4 other people, while for *Gadis* it was 5-9 friends who were spoken with. The high level of buzz generated by the ads was accompanied by many readers also visiting the advertisers' websites, visiting a store, looking for further information elsewhere, and keeping the ad for reference. In addition a number of respondents bought the products.

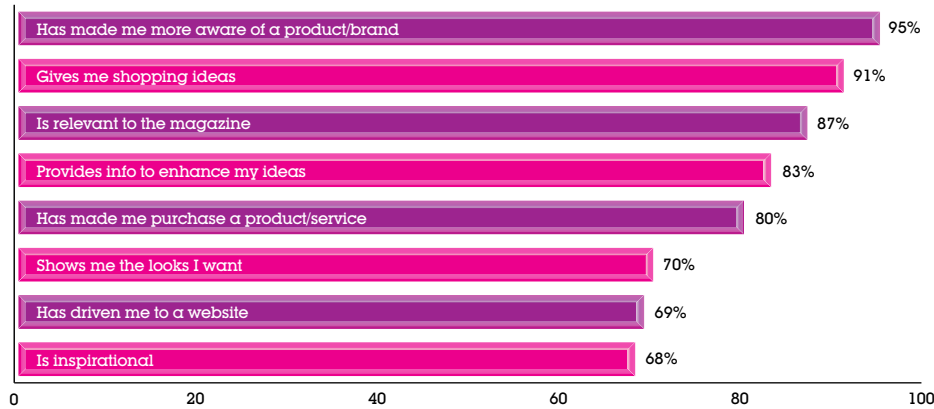
The situation is very similar in **Thailand**. The Magazine Association of Thailand (TMAT) commissioned a programme of qualitative and quantitative research called *Reader Behaviour and Potential of Magazines*, which ran through 2008 and 2009 [26]. The main reasons why consumers bought magazines, and their attitudes towards the advertisements, were the same as in other countries.

Comparing magazines with other types of media showed that magazines were considered distinctive and powerful in terms of providing detailed information (88% of respondents agreed), while generating new ideas and perspectives (81%). Ads in magazines could reflect a favourable image of products and services (66%).

The more interested that respondents were in the product category of an advertised product or service, the more likely they were to recall the advertisement. Recall also depended upon the creative work, the information provided, and the magazine's image in the respondent's mind - that is, involvement in the magazine brand. Magazine ads were regarded as good sources of information used for making a buying decision.

Fig 16. BEAUTY-RELATED ADVERTISING IN CLEO MAGAZINE

% who agree*: The advertising...



* Agree strongly + Agree. Base: readers of Cleo magazine. Source: Cleo Beauty Survey, 2008, Singapore

The power of magazine advertising within the beauty product category was illustrated by *Cleo* magazine in **Singapore**. *Cleo* is read primarily by young women from 18-29 years of age, and the magazine advises on beauty, fashion, health, sport, travel, finance and general lifestyle trends. The *Cleo Beauty Survey* [27] was undertaken with the objective of demonstrating to beauty advertisers and would be advertisers the influence and power of *Cleo* in creating awareness, engagement, brand loyalty and,

ultimately, driving retail through its strong relationship with young women who have high disposable incomes and a willingness to spend on themselves. A sample of 1,098 readers was interviewed by The Nielsen Company in September-October 2008.

Nielsen reported that almost 90% of *Cleo* readers, conscious about their image, were actively looking for ways to further enhance that image. When asked "Pick ONE medium that has given you the most relevant beauty information",

81% said magazines, and the next most popular medium was word of mouth recommendation, cited by 14%.

The positive attitudes to magazine advertising, and its ability to make readers aware of brands, absorb information about them, and be encouraged towards purchase, are demonstrated in Figure 16.

Figure 17 shows the power of magazines in prompting trial of a new beauty brand.

The *Cleo* survey is a fine illustration of the benefit to advertisers provided by a magazine with a clear editorial positioning and very close ties to its readers, who therefore rely on the magazine for much of their inspiration and guidance when considering their purchases in that field, and who find the advertisements as valuable as the editorial.

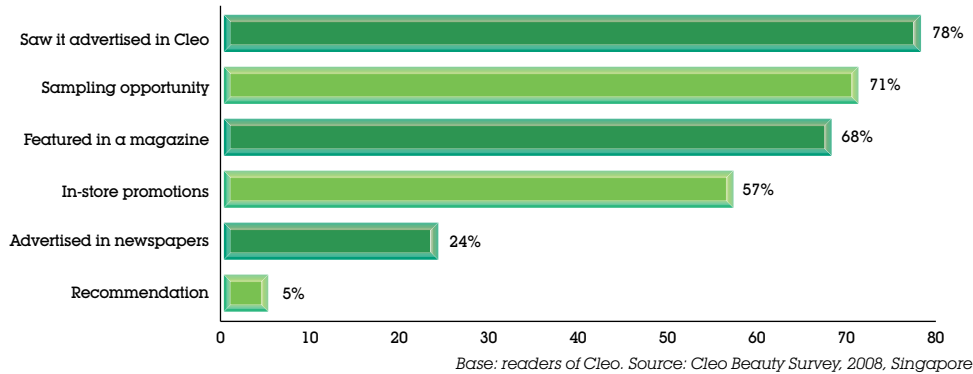
This, in **Singapore**, is exactly what is found in the very different media markets in **European** countries, **North America**, **Australia** and elsewhere, and is further evidence that printed magazines work in much the same ways all over the world.

A survey in **Ireland** reinforces the point that readers are likely to take action after seeing advertisements in their magazines. In the reader survey by *Easy Food* magazine [15] 73% of readers agreed that "I have bought a particular brand suggested in an *Easy Food* recipe or 'EF Recommends' box", and 91% agreed that "The advertising in *Easy Food* gives me useful product information".

Similarly glossy women's monthly magazine

Fig 17. TRIGGERS TO TRY A NEW BRAND OF BEAUTY PRODUCT

Q: 'What prompts you to try a new brand?'



Image, from Ireland's Image Publications, found in its reader survey [28] that:

- » 82% of readers had bought a product that advertised in *Image*
- » 81% had tried new health and beauty services which have been featured in the magazine
- » 88% considered that the advertising in *Image* was useful

Another example is Time Inc's *Magazine Experience Survey* in the USA [8]. It found that three-quarters of readers acted on the content of the advertising when they had finished reading a favourite magazine:

- » 55% talked to someone about something in the magazine.
- » 39% passed along an article to others.
- » 25% bought or intend to buy a product or service advertised in the magazine.
- » 22% recommended to family or friends a product or service they'd seen in the magazine.
- » 33% had visited a website mentioned in a magazine ad

The *AdSense* study published by IPC Media in the UK in 2012 [9] found substantial agreement with

these two statements, among readers:

- » I feel warmer towards the brand having seen the advert: 45%
- » I'm more likely to purchase having seen the advert: 46%

AdSense also found magazine ads were creating word of mouth communication. Among those who recalled seeing a given ad:

- » 18% talked to someone about the product
- » 10% recommended the product to someone

Engagement increases ad effectiveness

Another insight into the significance of the high degree of engagement among magazine readers comes from ad testing statistics held in a large database by publisher Sanoma Media, which maintains a central collection of multi-country research in **Belgium** [29]. Readers classified as having high engagement with a magazine consistently scored higher than those classified as having low engagement, across a range of measures of ad receptivity (Figure 18).

Ad clutter is not a problem in magazines

Advertisers are understandably concerned about advertisement 'clutter' in the media – increasingly so, as the volume of advertising messages escalates. With television and radio the linear nature of the medium means that if the length of the commercial break or the number of different commercials in it are high, it is more difficult for any one advertiser's commercial to be noticed and attract the attention of the audience.

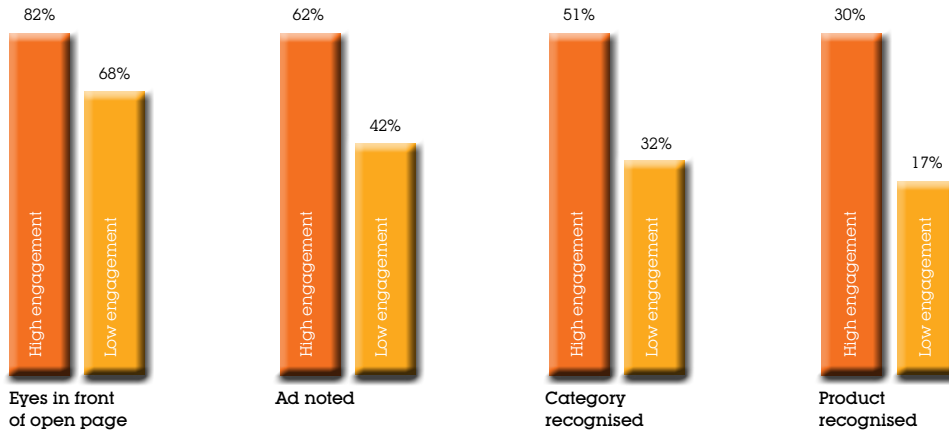
There is no such problem of clutter in

magazines however. The targeted nature of a magazine's readers means that most magazine ads have some degree of relevance to the issue's audience. Indeed the advertisements are generally regarded as an integral and important part of the content. Moreover the reader controls the order in which ads are looked at, and the attention and time devoted to each one – unlike the broadcast media where it is the broadcaster who controls which commercials are presented, when, and for how long.

In magazines the relevance of the ads, and the readers' generally positive attitudes, mean that a given advertisement's impact is not likely to be much affected by whether there are other ads nearby, ads from direct competitors, or whether a high proportion of the issue's pages are made up of ads. This has been confirmed by the *Stop/watch* report [30] published in 2005 by Medialogue in **Belgium**. *Stop/watch* is a compilation of several years' worth of data on ad noting and other measures of ad performance.

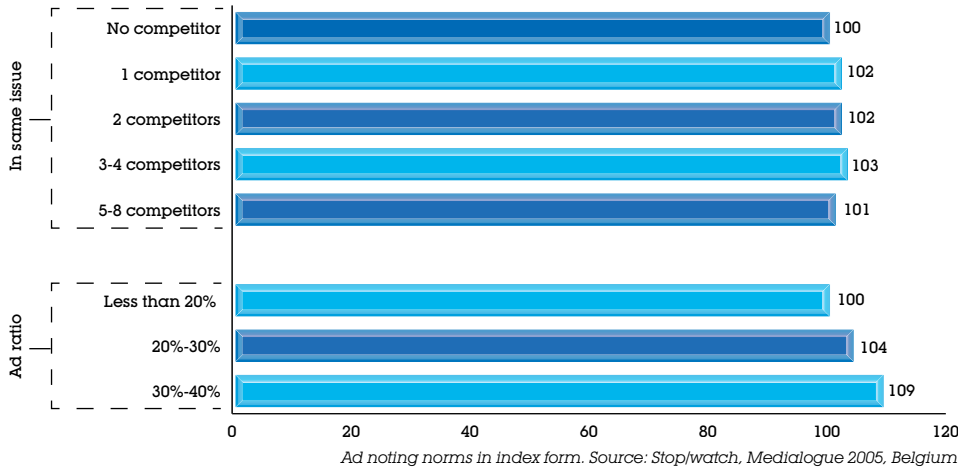
Figure 19 shows that there is no disadvantage (in terms of recalling the advertisement) to have direct competitors advertising in the same issue of the magazine. It makes no difference whether there are no competitors or eight competitors in the issue. This is a contrast to television and radio, where it is a cardinal rule not to have direct competitors in the same commercial break. (The magazines tested were mass-market titles. With specialist magazines, readers positively want lots of competitors in

Fig 18. **ENGAGED READERS SEE MORE**



Source: Sanoma RRO Database, 2000-2010

Fig 19. AD NOTING: AD CLUTTER IS NOT A PROBLEM



the same issue. Computer magazines are a good example: many are thick with advertisements and catalogues, forming a marketplace.)

Secondly, it is no disadvantage to have a high ad ratio: that is, the proportion of total pages in the issue which are advertisements. Indeed, quite the opposite. For ads in issues where 30-40% of the pagination is advertising, the average score for an ad is slightly higher than for issues with lower proportions of advertising.

Another way of measuring ad clutter is to

analyse noting scores by thickness of issues. An analysis by GfK MRI Starch in the USA in 2011 [31] examined average noting scores by size of issue, based on 2,902 magazine issues and more than 78,000 ads (full or double pages in colour). It found that there was no difference in noting scores between issues with less than 175 pages, 175-225 pages, 226-274, 275-325, 326-499 and 500+ pages. Thicker issues means more ads, yet the greater volume of ads did not cause any fall in noting scores.

Readers with a predisposition to buy

In Australia Pacific Magazines has been examining action by readers with a predisposition to buy, in its Buyers Action Measure (BAM) programme of research [32].

Purchase is the last in a chain of decision-making and information-absorbing stages, each of which may be influenced by interaction with an ad. While an individual consumer does not necessarily go through every stage prior to purchase, and may skip some, it is valuable to measure each of a series of consumer responses in turn. BAM measures seven possible actions taken as a result of seeing a specific ad, and it measures them among two audiences: all readers, and those with a predisposition to buy within the relevant product category (the BAM audience).

Through these seven action stages, Pacific Magazines aimed to prove that magazines are able to generate a complex range of overlapping actions as a result of exposure to ads, as consumers graduate through the range of possible responses.

Aggregated results based on surveying individual ads during 2010 showed that, on average, 57% of all measured ads were recalled. Among those who recalled an ad, 91% also recalled the advertised brand.

Average ad noting/recall scores varied according to the quarter of a magazine in which the ad was placed. Based on full page ads only (mainly to remove the effect of double-page spreads being concentrated towards the front

of the books), average ad noting scores showed a moderate benefit in being as early in the magazine as possible (Figure 20). There was also, on balance, a very small advantage in being on a right-hand page.

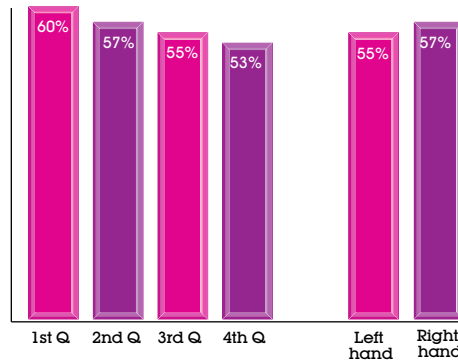
Aggregating across all ads measured, among all readers who recalled the advertisement, average scores for the seven action stages were:

- » Visited advertiser's website: 9%
 - » Clipped or saved ad: 4%
 - » Contacted advertiser: 2%
 - » Talked about product/service: 12%
 - » Recommended product/service: 7%
 - » Looked for product/service: 13%
 - » Bought product since seeing the ad: 7%
- » Any of the 7: the ACTION score: 24%

These figures are likely to be underestimates because they show actions taken within nine days of the on-sale date of a weekly magazine and three weeks for a monthly – in order to interview respondents while their memories were reasonably fresh. But the interview would therefore take place before some of the eventual actions had occurred.

While the figures above were based on all readers of the surveyed magazine issues, the next level of analysis was among those readers who were in the market for the advertised brand's product category – that is, the core potential buyers. They were defined as those who have in

**Fig 20. AUSTRALIA:
AD NOTING BY QUARTER OF
MAGAZINE, AND LEFT/RIGHT PAGE**



*Based on full page advertisements only
Source: Buyers Action Measure (BAM).
Pacific Magazines, 2010, Australia*

the past bought, or say they intend in the future to buy, a brand in the product category. The scores among this group are called Buyers Action Measures (BAM).

Naturally, this group showed a higher level of actions than all readers. Overall, 34% of the BAM group took at least one of the seven actions, compared with 24% of all readers. Even so, many of the non-BAM readers – those outside the core market – still took action, and some of these represent new potential buyers.

There were variations by product category. In the baby products category 47% of the BAM group took at least one action after seeing an ad, and for household products and cleaners it was 43%.

At the level of an individual advertisement, this methodology provides some evidence to the advertiser of the return being delivered for the investment. At the level of aggregated results, it demonstrates the ability of printed magazines to nudge consumers in the direction of buying.

Ad impact: it's worldwide, and in the nature of printed magazines

All the surveys quoted in this chapter (as well as a very large number of other studies) are saying essentially the same thing. They prove beyond doubt that advertisements in printed magazines create an impact among readers, and that this is worldwide, across countries with very different conditions in the local media market. It is in the nature of printed magazines. Advertisements are a valued part of a magazine's content. For the average ad, 90% or more of readers are exposed to it, in the sense of eyes open in front of the page; 50-60% of readers can recall seeing it; and this proportion is strongly affected by the creative work and the reader's own interests and associations. Among those recalling an ad – a group of subconsciously self-defined readers for whom the ad carries some significant connection – there are high levels of further mental activity and physical actions, moving readers further along the consumer journey towards purchase. ●

3

Creative formats for print ads

Innovative, original formats and devices within magazines heighten impact and increase involvement

Creative format = premium impact

An investigation of creative formats was commissioned by the Professional Publishers Association (PPA) in a UK study called *Creative Format, Premium Impact*, in which semiotic analysis and focus groups were used by Rachel Lawes Consulting [33]. Conclusions were drawn about a range of formats.

» Double page spreads

Double page spreads are more than just bigger spaces. They present a chance to talk to readers on their own without distraction, and to create a world of their own. The wide rectangular space is excellent for telling a story, including ads with a strong fantasy or aspirational element. The content of the ad is seen as a bit special simply because of format.



» Gatefolds

Gatefolds – where the page opens out and reveals two further pages beneath – take this a stage further. Their physical nature makes them demand reader attention and interaction. The additional width makes this a particularly good

way of getting across a story or narrative. One effective manner of presentation is to place the ‘hero’ brand in the centre, flanking it on each side with supporting material; this draws on echoes of the traditional triptych format familiar in Western culture and associated with reverence. Butterfly gatefolds – spreads where both pages are themselves gatefolds – take the surprise element further, intriguing readers.

» Print technology, textures and special papers

“Contemporary print and paper technology is the modern art of magazines” declared Rachel Lawes. It is exciting, unpredictable and effective for engaging audiences. Artists are using textures, optical illusions and objects in their work to make their point or elicit reaction – presenting

advertisers and creatives with a wealth of ideas to develop for their own use. Sensory experience is enhanced by using unexpected materials. Two examples are formats incorporating thermachromatic (causing images to change with heat) or lenticular (where the image appears to move) elements.

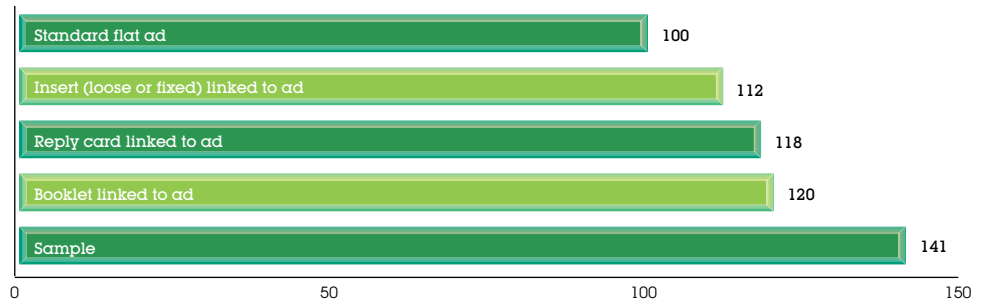
Different weights, qualities and textures of paper; embossing; die cutting and unusual trimmed pages; scratch 'n' sniff or 'peel it' fragrances; 3D spectacles with which to view a 3D advertisement; and other forms of paper engineering – the research confirmed that these are all effective ways of delivering impact and encouraging readers to interact with the ads. They present something tactile that readers feel they just have to touch and explore.

Post-it notes are arresting when they crop up in unexpected places such as attached to an advertisement: because of the way people normally use them in their everyday lives, they say to the reader “This is something I must remember”. (These days, nine years after this research was conducted, one would add the digital technologies of 2012 to this list of special things to do with advertisement pages.)

» **Sponsorship and supplements**
Sponsorship implies endorsement of the advertiser by the magazine – whether the

Fig 21. AD NOTING: INSERTS, BOOKLETS AND SAMPLES

Indexed: Standard flat ad = 100



Source: Stop/watch, Medialogue, 2005, Belgium

sponsored item is a page of the magazine, a pull-out supplement, a separate supplement, or any other element of the editorial package. The phrase ‘sponsored by’ suggests something of editorial origin, subsequently supported by the advertiser, whereas the phrase ‘in association with’ suggests a more equal partnership between editor and advertiser. A particularly close approach to readers can be made by sponsoring a regular feature in the magazine. It makes the brand seem an integral part of the publication, tapping more deeply into the reader’s

relationship with the magazine, and naturalising the brand’s presence.

» **Samples, vouchers and gifts**
Rachel Lawes established that samples, vouchers and gifts draw the reader closer to the advertiser. Samples have the advantage over vouchers that the gratification is immediate. Gifts are warmly received and were found to enhance the reader’s perception of both the advertiser and the magazine. However they must be appropriate – for the reader and the magazine. This means

READING ADVERTORIALS 1

"ALTHOUGH IT IS AN ADVERT, IT LOOKS LIKE IT COULD BE AN INTERESTING ARTICLE"
"IT SAYS 'AN ESQUIRE PROMOTION' SO IT LOOKS AS THOUGH ESQUIRE ARE ENDORSING
THE PRODUCT AND THAT IN MY EYES GIVES IT EXTRA VALUE"

Respondents in The Readers' Perspective, for The National Magazine Company, UK

making a gift as personal, flattering and meaningful as possible, rather than something that could have been chosen for anybody.

Samples and inserts linked to ads

The conclusions in the *Creative Format, Premium Impact* research about samples were corroborated by evidence from **Belgium**. Medialogue's *Stop/watch* ad barometer research [30] measured advertisement noting for advertisements carrying samples, inserts and booklets (Figure 21).

Compared with standard flat advertisements, the addition of inserts to an advertisement (stuck onto it, or in a blister, or loose) raised average ad noting by 12%, while reply cards or booklets linked to an ad raised it by about a fifth. Most impressive however was the effect of samples, where ad noting was boosted by 41%.

Nevertheless the benefits of samples go well beyond mere recalling of the ad. Medialogue commissioned a qualitative study in **Belgium** in 2002 called *The Samples Research* [34] which dealt with cosmetics advertisers in women's magazines.

It showed that samples were appreciated by women, who considered them a natural thing for magazines to carry. Free samples are part of the fun of a magazine. They create goodwill and readers are keen to try them.

Advertorials/Branded content

One creative use of ad space is advertising content written in the house style of the host magazine, with a statement at the top such as 'Advertisement' or 'Promotion' to indicate its true nature and avoid misleading the readers. These are sometimes known as advertisement features, or branded content. However the most popular term seems to be 'advertorials', a neat condensation of 'advertising' and 'editorial'.

Advertorials enable the advertiser to don the mantle and sport the values of the magazine. The PPA/Rachel Lawes survey *Creative Format, Premium Impact* (see above) described how this intimacy brings added credibility to the brand, while readers appreciate the extra material for them to read.

The objective should not be to trick readers

into thinking it is an editorial feature – they are unlikely to be fooled for long and will resent being misled – but to let them understand this is an advertiser-related feature which offers extra value via information and/or entertainment.

Another study to investigate advertisement features was *The Readers' Perspective*, a qualitative study in the **UK** for the National Magazine Company [2]. Readers of eight of National Magazines' titles were interviewed. Advertorials were found to be welcomed because of their originality and unique qualities. They are considered 'added value' advertising. One informant expressed it by saying "There's something extra there to read, and you feel you're getting a little bit more".

Advertorials encourage readers to take a closer look at a product. *The Readers' Perspective* found that while a reader normally immediately recognises that an advertorial is a promotion and not a page of editorial, the reaction is likely to be:

1. This is an article or feature about Product X
2. The editorial approach and layout

are interesting (after all, it's the same as the one I love throughout the magazine's editorial pages)

- 3. It's an exclusive
- 4. This offers a reward to me
- 5. I will read it, or at least scan it

While display advertising is seen as providing subjective information which is under the control of the advertiser, and editorial is seen as unbiased information under the control of the editor, advertorials fit neatly in between. They are under the joint control of the advertiser and the editor. The editor is there to represent the interests of the reader and ensure fair play. There is a strong implied endorsement by the magazine.

This endorsement by the magazine was also a prime finding from another UK survey, *Advertorials: Qualitative Research*, commissioned by SouthBank Publishing Group [35]. Readers assume the editor has been involved in the selection of the product shown in the advertisement feature, and this implies researching the products and choosing the one that's best for readers. The more closely

the advertorial matches the magazine's own style the stronger the assumption that the editor has written it, and thus the stronger the endorsement. The magazine's own brand values feed into the advertorial, and they in turn feed into the readers' perception of the product. Advertorials are perceived as generally useful and informative, which encourages an overall positive feeling about them among readers.

Research in the **Netherlands** agreed with the findings of these earlier studies. The survey *Taking Advantage of Editorial Credibility*, published by Sanoma Media and Media Test in 2012 [36], showed that branded content is highly appreciated, in both printed magazines and on magazine publishers' websites. Eleven

brands were examined. In print, conventional advertisements were compared with advertorials for the same brands. On websites, standard advertisement rectangles were compared with branded content panels for the same brands.

The qualitative stage of the research established that the branded content should be presented in the style of the editorial content, and there must be a well-judged subtle balance between the advertiser's message and additional relevant material that interests, inspires and provides something to talk about. Then it earns high credibility and consumers positively want to read it, as they do editorial articles. The branded content was variously described as fun, appealing, believable, interesting, honest and

Fig 22. ADVERTORIALS COMPARED WITH STANDARD ADS

	In printed magazine		On website	
	Ad	Advertorial	Rectangle ad	Advertorial
Entertaining	36%	50%	37%	61%
Message recall	33%	44%	23%	88%
Brand consideration	45%	50%	57%	63%

Source: *The Added Value of Branded Content*, by Sanoma Media and Media Test, The Netherlands, 2012

READING ADVERTORIALS 2

"IT'S LIKE YOU ARE WITH A GROUP OF GIRLFRIENDS CHATTING ABOUT A NEW PRODUCT"
 "A POSITIVE STORY ABOUT A NICE PRODUCT, A DIFFERENT STORY THAN STANDARD ADVERTISING"

Respondents in *The Added Value of Branded Content*, Sanoma Media, The Netherlands, 2012

Fig 23.
SCENTED ADS COMPARED WITH ALL ADS

	All ads	Scented ads
Noting score	54%	64%
Read any of ad*	82%	88%
Read most of ad*	42%	48%

* Base: Ad noters. Source: GfK MRI Starch, Jan-April 2011, USA

reliable, and readers tended to agree that “it gives me a good feeling” and “I want to read it”.

The quantitative stage of the research measured the extent to which the advertorials performed even better than the conventional ads. Figure 22 shows that, in print, advertisement features achieved higher scores for entertainment, message recall, and brand consideration (“Which brands would you consider when buying...?”).

Online, the advertorials scored substantially higher than ad rectangles for entertainment, and message recall, and somewhat higher for brand consideration.

The statistics in the **Netherlands** in 2012 paint the same broad picture as the statistics from a **UK** study in 2006 called *Creative Works*, published by Emap Advertising [37]. Compared with conventional ads, advertorials delivered 27% higher brand awareness, and 11% higher purchase consideration. 52% of magazine readers agreed that they would read an advertorial even if they weren’t initially interested in the product being advertised.

Scented ads

One of the creative uses of print is to add scents to the paper, often through scent strips whereby a scent is released when the strip is pulled off the page, or when the page is scratched or rubbed. Does this affect the performance of the ad? In the **USA**, GfK MRI analysed their database of Starch-measured ads to find out [38]. Selecting five product categories, 6,514 magazine ads in those categories had been researched during the period January-April 2011. 49 of those ads used scented paper (Figure 23).

The average noting score for all 6,514 ads was 54%, but for the 49 scented ads it was 64%, a 19% lift. The reading scores were higher too.

How many tried the scent? On average, 17% of those who noted the ad. The highest was an ad for Febreze Air Freshener and Candles in *Cosmopolitan*, where no less than a third of noters (33%) experienced the scent. Clearly, the use of scent can increase readers’ involvement and interactivity with a print ad.

A similar finding emerged from the *Magnify* study by the PPA in the **UK** [23]. Ads with fragrance strips attracted 20% higher noting scores than the average for all ads. This is almost identical to the Starch figure of 19% uplift in the **USA** – and another example of the fact that consumers use magazines in much the same way in different countries.

The *Magnify* study went on to find that ads with fragrance strips were 58% more engaging, and 67% more ‘effective’ than ads without, on average.

Mobile action codes

Technology is driving innovation in printed magazines at an unprecedented rate, with barcodes, augmented reality, watermarks and other emerging methods enabling publishers to make their printed pages more interactive, and to lead readers to new experiences on mobile devices.

Notably, the year 2011 saw strong growth in the use of ‘mobile action codes’ such as 2D bar codes, QR (Quick Response) codes, Microsoft tags, and certain other types of symbols printed on a magazine page, and non-visual links such as watermarks. These codes are activated by camera-equipped smartphones or tablets. When an appropriate code-reader app is opened on the device, pointing the camera lens at the printed code brings up new material on the smartphone or tablet. Readers can immediately be watching a video, listening to an interview, and more – seeing an advertisement come to life.

In the **USA**, mobile marketing firm Nellymoser has surveyed the top 100 **USA** magazines by circulation [39]. It found that the number of mobile action codes climbed from 352 in Quarter 1 2011 issues to 1,365 in Quarter 1 2012 issues. 80% of the codes printed in the top 100 magazines in Quarter 1 2012 were QR codes. Other types used included Microsoft Tags (16%), other 2D barcodes, digital watermarks and Near Field Communication (NFC).

The number of magazine titles using at least one action code was 78% in Quarter 1 2011, reached 90% in May, rose to 96% Quarter 4 2011,

PANEL 3

QR CODES IN REPORTERS WITHOUT BORDERS AD CAMPAIGN

The free-speech organisation Reporters Without Borders, registered in **France**, launched a magazine ad campaign, created by Publicis Brussels, to raise awareness of suppressed speech liberties around the world.

A QR code in the ads enabled readers to place a smartphone over the mouths of pictured dictators to see and hear a moving mouth speaking – but it was not the mouth of the dictator but a journalist describing restrictions on free speech. To see this in action, use the QR code below.



Reporters Without Borders

For further examples of outstanding creative uses of magazine advertising – some using QR codes, some using other striking ideas – see *Innovations in Magazine Media 2012 World Report* (40), published by FIPP

and 99% in Quarter 1 2012. The proportion of advertisement pages with codes rose steadily from 3.6% in March 2011 to 8.4% in Quarter 1 2012. The average number of codes per issue rose from 2.3 in Quarter 1 2011 to 4.9 in Quarter 1 2012.

The Nellymoser analysis found that codes which merely send readers to a website were reducing in importance. Instead, most codes aim to engage users with branding campaigns, product demonstrations, e-commerce, social media and sweepstakes for building customer databases. When scanned, over a third of codes (35%) took users to video content while 21% took users direct to a mobile commerce app/site, 20% to subscription/sweepstake and 18% to a social media sharing site.

Allure magazine in the **USA** ran, in 2011, a 'Free Stuff' issue featuring Microsoft Tags on many of the advertisements. Readers scanned these tags 200,000 times in only three days. This was one of the success stories, but what is the typical performance of such tags and codes?

GfK MRI Starch Advertising Research, as part of their online monitoring of magazine issues in the **USA**, found that in the first half of 2011 4% of **US** readers who noted an ad containing a 2D barcode got out their smartphones and used the code, to download the promised information [38]. Men, and 18-34 year olds, scanned the codes more than average. One of the highest scoring ads was for Porsche cars in *Men's Journal*, where as many as 17% used the code to see more of the car.

If 4% using the barcode seems a small figure, consider that most of these (i.e. those not doing it purely for the novelty) will be the very readers who are particularly interested in the product, and many will be among those consumers who are closest to considering buying the product. With the exception of any pure novelty-seekers, the very act of using the barcode self-defines a reader as a prime sales prospect. It is a very good example of the accurate targeting by magazine media. ●

4

Consumers' use of digital formats

Publishers' printed magazines, websites and digital editions are complementary, serving different functions. Users are engaged by magazine content in digital formats as well as in print.

Magazine publishers are evolving into multi-platform content publishers, rapidly adopting digital channels and providing all-round opportunities to reach both mass and targeted audiences. The digital platforms include websites, tablets, e-readers, smartphones, and social media networks. This chapter is divided into two main sections – WEBSITES and DIGITAL EDITIONS.

Websites

Print and websites complement each other

Magazine reading and internet surfing have an affinity with each other, in that the kind of people who read magazines tend to be the kind of people who use the internet. One of many countries to demonstrate this is the **Czech Republic**, where the *Cesky Statisticky Urad 2010* [41] showed that internet penetration was higher among magazine readers than among the general population in every age group.

For example, 36% of all 55-64 year olds were internet users in the last three months, but it was 52% among magazine readers in that age group. Similarly among a younger age group, 25-34 year

olds, 77% were internet users but the figure was 93% among magazine readers of that age.

Another **Czech Republic** source, *The WoM Effect*, published by the Czech Publishers Association/Millward Brown in 2011 [42], found that 38% of print magazine readers also read magazines online. The proportion was even higher among people under 45 years of age.

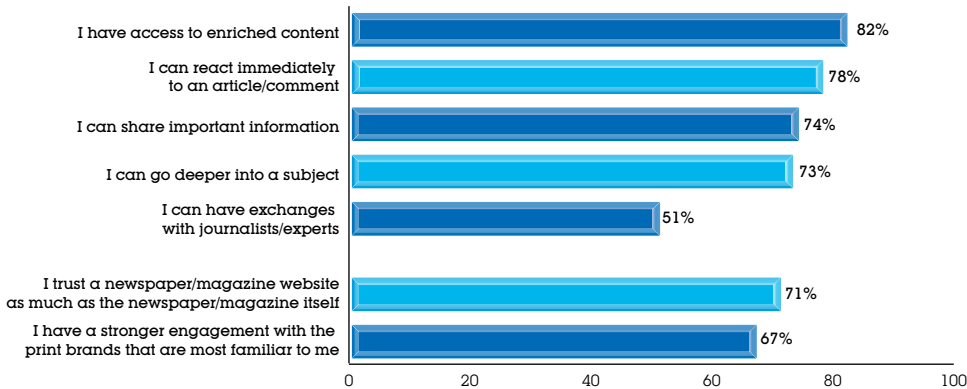
This substantial level of overlap between print and online magazine audiences – a simple illustration of the complementary nature of print and websites – was echoed in **Greece** by the study *Developing A Media Brand* conducted by Focus Bari for the weekly motoring magazine *Autotriti*

in 2009 [43]. The study also found that the brand personality of *Autotriti* was equally strong among print readers and website visitors. The audience demographics and car-related profile was almost identical for users of both platforms. However there were differences in usage. For example, the website was particularly effective for saving time and cost before buying a car, through consumers researching when actively looking for up to date information. The printed magazine came into its own for pleasurable relaxation and inspiration.

The complementarity between a magazine brand's print and website offerings was underlined in detail by a survey in **France**,

Fig 24. PUBLISHERS' WEBSITES: RICHNESS, INTERACTIVITY & TRUST

% agreeing with statements



Source: L'Efficacité Print + Web, SPM, France, 2011

L'Efficacité Print + Web, published by SPM La Presse Magazine [44]. The survey, conducted in July 2011 using an online sample of more than 4,600 magazine readers, studied three categories of publication: news, women's and cars.

72% of respondents agreed that 'I feel that the information in a newspaper or magazine and its internet site truly complement one another'. 75% agreed that 'I find it very natural to read

a newspaper or magazine and to consult its internet site or its mobile application'.

Consumers liked the enriched content and depth of publishers' websites, and the ability to interact with them – as Figure 24 shows.

The chart also confirms that the innate values of print brands are transmitted to their digital extensions. Publishers' websites are more involving than the websites of pure players.

Fig 25. ACTIVITIES BY MAGAZINE READERS WHO VISIT A MAGAZINE WEBSITE

Read an article online	72%
View/click on an ad	24%
Forward an article to someone	24%
Bookmark the magazine's website	21%
Download/print an article	20%
Purchase a product/service	10%
Subscribe to a magazine	8%
Post a comment/blog	8%
Download an application	5%
Another activity	24%

Source: VISTA Service, Jan-Dec 2010, Affinity Research, USA

Print publishers are ideally placed to operate successful and appealing websites.

SPM described this as "the 'New Deal' of print brands, which reinvents the experience of editorial content". Print media brands enhance advertisers' print and digital campaigns, because building on solid print values while taking advantage of digital benefits spells maximum impact on relevant targets.

Magazine readers perform a wide array of activities while visiting a title's website, with the reading of articles being the most popular, according to data published in 2011 by Affinity Research, based on their *VISTA Service* in the USA [45]. Figure 25 shows that other popular activities include forwarding an article, viewing or clicking on an ad, bookmarking the site for a return visit, and downloading or printing an article.

Affinity also found that 48% of magazine readers go online to find more information about the advertising in their printed magazines.

In the **Czech Republic** the *Magazine Advertising Study* by the Czech Publishers Association/Millward Brown in 2010 [10] found that 48% of adult readers said they noticed www links in magazine ads. Among these, 54% visited advertisers' websites, 29% noticed them and know where to look for further information, and only 17% took no further steps.

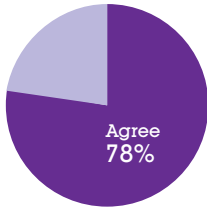
Another reflection of the complementary nature of print and web is the growing number of content publishers who began as websites and later decided to launch a print magazine to do things which the website couldn't do. If print didn't exist it would have to be invented.

Complementary – but print is preferred to websites

In spite of the value and interactivity of websites, most consumers still prefer printed magazines to websites. An example in the **UK** comes from the *Vogue Business Report 2011* from Condé Nast

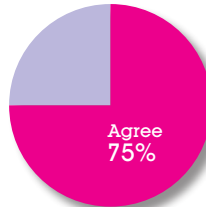
Fig 26. PRINT AND WEBSITES ARE COMPLEMENTARY

"Print magazines and magazine websites serve different purposes"



Source: *Vogue Business Report 2011, UK*

"Digital content complements print"



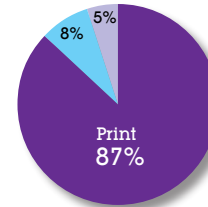
Source: *Harrison Group/Zinio/MEMS Technologies, 2010, USA*

[46] which interviewed ABC1 women aged 20-54 who regularly read at least one of 10 women's magazines. Asked "Which is your preferred way to access magazine content?", 87% preferred a printed magazine, 8% preferred websites and 5% had no preference. 93% agreed with the statement "I love having a 'magazine moment' where I can relax with the print version".

However these glossy magazine readers are not technophobes or techno-resisters. There was a perception that print and websites are

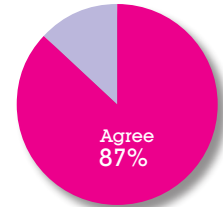
Fig 27. PRINT PREFERRED TO WEBSITES FOR MAG CONTENT

Preferred way to access magazine content



Source: *Vogue Business Report 2011, UK*

Prefer printed copy



Base: Those interested in reading digital magazines
Source: *CMO Council, 2010, USA*

complementary, with 77% agreeing "I use magazines to inspire me and the internet for research". Moreover 48% agreed that "I tend to read magazines when they go on sale and use magazine websites to stay updated between issues".

There are some marked parallels between the UK *Vogue* survey and two studies from the **USA** [47, 48]. While the samples in both countries see print and websites as complementary (Figure 26), the great majority still prefer a printed copy (Figure 27).

"ONLINE IS A QUICK FIX –MAGAZINES ARE SOMETHING TO SAVOUR"

Respondent in *Vogue Business Report 2011, UK*

Digital editions

Digital editions of magazines may be read on tablets (such as the Apple iPad), e-readers (such as the Amazon Kindle), smartphones and personal computers. Most digital editions are close replicas of the printed magazines as far as content is concerned, with relatively limited interactive features. Some digital editions diverge more substantially in the scope and scale of the interactive features included. It seems likely that during the near future some digital products will evolve further from the print editions and become markedly different publications.

Penetration of digital editions

The circulation of digital magazines has been growing very rapidly. For example, figures released in 2012 show that in the USA the total digital circulation of consumer magazines tracked by the Audit Bureau of Circulations jumped from 1.4 million in the second half of 2010 to nearly 3.3 million in the second half of 2011 – more than doubling in one year. Nevertheless, to put it into context, digital circulation was only 1% of total paid and verified circulation.

In the USA, MPA The Association of Magazine Media commissioned a survey called *The Mobile Magazine Reader*, published in 2012 [49]. Conducted by Affinity Research using its AppTrack panel of tablet or e-reader users, the survey found that 68% of the panel used an Apple iPad,

40% used an Amazon Kindle, and small numbers used other devices. 83% had used an app which enabled them to download an entire issue of a magazine, just like the printed version, while the other 17% had only used apps which downloaded selected features from magazines. 68% had been using such apps for less than one year (the fieldwork was in November 2011).

An analysis by Adobe Systems Inc in 2012 [50] looked at **worldwide** usage of tablet publications produced via the Adobe Digital Publishing Suite. Adobe concluded that accessing magazine content is a popular use of tablet computers. The analysis showed that, in the 12 months ending January 2012, 16 million digital publications had been downloaded, from the 1,500 tablet publications (magazines and newspapers) which use the Adobe suite. 68% of digital readers worldwide paid for some or all of their digital magazines and newspapers. 15% opted for single-copy purchases, 26% bought subscriptions and 27% went for print/digital bundles.

In **Germany** the proportion of iPad owners reading magazine content on their iPads was as high as 68%, according to the study *Magazine Usage on the iPad*, published by VDZ in 2011 [51].

A very similar proportion was found in the **USA**. An analysis of the iPanel created by GfK MRI, composed of tablet and e-reader owners [52], discovered in January 2012 that 71% of tablet owners were interested in reading digital magazines on their devices. The proportion was even higher among younger adults, with 85% of

male tablet owners aged 18-34 saying they would like to read digital magazines, along with 78% of female tablet owners in the same age range.

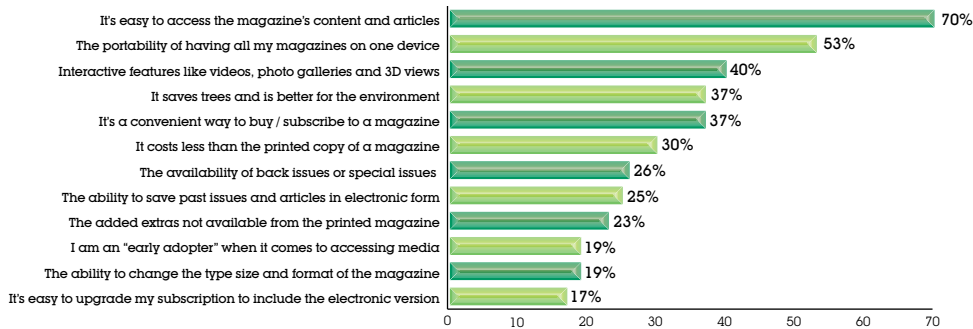
GfK MRI also found, in their *Survey of the American Consumer* [53] that during March-October 2011 fieldwork, 10.5% of all exposures to magazine content was in digital-only format. The total gross magazine audience, defined as the number of consumer exposures to magazine-branded content on any platform (print or digital) was 1.58 billion. Of these, 1.28 billion (81.0%) were print-only exposures; 166 million (10.5%) were digital-only, and 135 million (8.5%) were print and digital.

Profile of readers of digital editions

GfK MRI's *Survey of the American Consumer* also established that digital-only magazine readers skewed younger, better-educated and more affluent than the general population (March-October 2011). 36% of digital-only readers had an annual household income over \$100,000, an index of 143 compared with the general population's index of 100. 42% had a bachelor's degree or higher (index of 151). In terms of age, 54% were Millennials (born 1977-1994; 178 index), 24% were Gen-Xers (born 1965-1976; 110 index), while only 20% were Baby Boomers (born 1946-1964; 61 index).

Similarly *The Mobile Magazine Reader* survey found that **USA** magazine app users were young (57% were 18-34), affluent (average household income of about \$86,000), and very well

Fig 28. REASONS FOR ACCESSING MAGAZINES IN ELECTRONIC FORM



Source: *The Mobile Magazine Reader, MPA, USA, 2012*

educated (66% were college graduates or higher).

In **Germany** Axel Springer showed in its *iPad Media Impact Study* of 2011 [54] that newspaper/magazine iPad subscribers are well educated and financially well-off. In the same country the VDZ study confirmed that the average income of iPad users was above the national average.

Taking a wider geographical spread, Sanoma Media's *European iPad Survey* of 2011 was run in six countries: **Russia, Hungary, Finland, Netherlands, Belgium** and **Germany** [55]. It discovered that 63% of iPad users in these countries had above-average household incomes, 71% had a university degree (89% in **Russia**), the average age was 39, and 91% bought products online at least occasionally.

What is striking about all the surveys in these various countries, and surveys in other countries which have not been quoted, is the consistency of findings that typical readers of digital editions of magazines, and owners of tablets, have above-average incomes, are better educated than the general populations, and are skewed towards the younger end of the age range. They are a very desirable target audience for many advertisers.

Reasons for reading digital editions

The Mobile Magazine Reader in the **USA** revealed a varied range of reasons for reading in digital format (Figure 28), of which the most popular were "It's easy to access the magazine's content and articles" (70% agreed), "The portability of

having all my magazines on one device" (53%) and "I like the interactive features like videos, photo galleries and 3D views" (40%).

Time spent reading

A considerable amount of time is spent reading digital magazines.

The Axel Springer iPad panel in **Germany** [54] established that users spent an average of 4 hours 38 minutes a week reading newspapers and magazines on the device – averaging 40 minutes per day.

In the **USA** a 2011 conference paper called *A Day in the Life: Tracking E-Reader and Tablet Owners' Activities and Patterns of Use*, by Risa Becker and others, of GfK MRI [56], found that tablet owners spent an average of 2.5 hours using their tablets each day, on all uses of the tablet (not just magazines). GfK MRI commented that "The tablet is an absorbing platform which encompasses a number of activities that consume a lot of users' time." E-reader users spent rather less time on their devices - an average of about 2 hours per day.

The MPA's *Mobile Magazine Reader* concluded that an average of about 2.5 hours per week was spent reading digital editions of magazines. Most readers accessed a given issue two or three times. Two-thirds of users thought their reading of magazines on these devices would increase during the next year. There was considerable sharing of digital magazines with others (39% did) and 55% typically read earlier issues as well

as the current issue.

Still in the USA, a Meredith/MediaVest study compared digital and print editions of Meredith magazines among female iPad owners in 2011 – reported in a conference paper called *Guidelines for Maximising the Value of Tablets versus Print Magazines* by Britta Ware and others [57]. The study discovered that there were only small differences in overall time spent reading between printed and digital editions, but it was digital editions which generated the slightly higher time spent reading, due to the interactivity of digital editions. One respondent remarked “I actually spent more time reading this version since I was interested in tapping on all the added features. It was a great pleasure going through the digital version”. Getting more information *on demand* was valued.

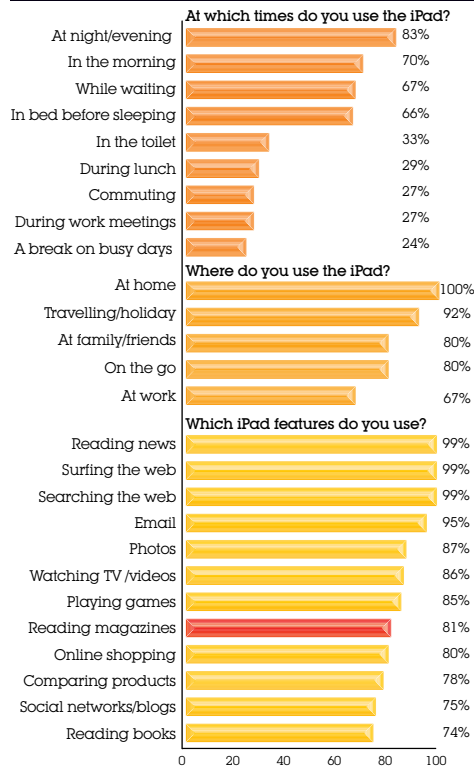
The Adobe analysis of **worldwide** usage found that 56% of readers spent between 25 minutes to 2.5 hours per month reading their tablet publications, and 9% spent more than 5 hours a month. Readers said that their average time spent had increased by 70% over the last six months.

According to Sanoma Media's *European iPad Survey*, 94% of iPad users in the six countries use the iPad several times per day, and roughly half of these spend between 30 minutes and 2 hours on it each day (all uses, not just magazine content).

Mode of reading

The *European iPad Survey* also made contributions about a number of other aspects of iPad usage in the six countries. 67% of iPads are actively shared

Fig 29. **iPAD USAGE** (6 European countries)



Source: Sanoma Media, 6 countries, 2011

with other people, principally spouse or partner (87% of those sharing) or children (61%), but also friends (50%) and colleagues (27%). There was a high usage of apps, with 30% having downloaded 50 or more apps. 83% of owners used the iPad in the evening in the living room (Figure 29) while 70% used it in the morning. 66% used it in bed before going to sleep. While everyone used their iPad at home, 67% also used it at work, as well as at family/friends (80%) and while travelling or on holiday (92%). The most popular activities on the iPad were reading news, and surfing/browsing/ searching the web. Notably, 81% of users read magazines on their iPads.

In terms of the format in which tablet owners read digital magazine content, the most popular way for **Americans** was through apps, with 65% of tablet owners who read a magazine on it in the last 30 days doing so via an app, according to the GfK MRI iPanel [52]. 47% of tablet owners accessed magazine content by visiting the website, and 37% read a digital reproduction of the printed magazine. Tablet ownership also encourages readers of both genders to read back issues of magazines. 19% of tablet owners on the iPanel who read a magazine on their device in the previous 30 days also read back issues of the same title.

In the **Netherlands** the *Viva Ad Impact iPad Survey* commissioned by Sanoma Media in 2011 [58] discovered that 62% of women reading an issue of the magazine *Viva* on the iPad read the whole of the issue or almost all of it, and a

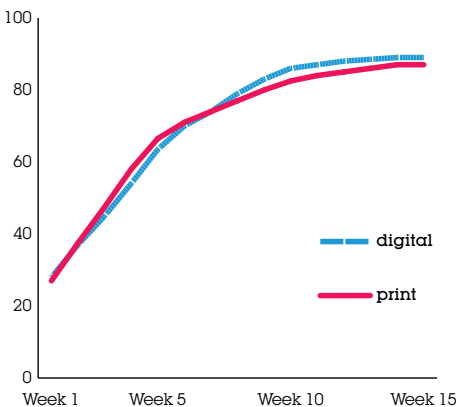


significant proportion had read or expected to read the issue on more than one occasion. 73% very much liked the interactive facilities offered by the iPad edition.

The Meredith/MediaVest *Guidelines* study by Britta Ware and others in the USA reported that, in comparing print and digital magazine experiences, there were some obvious differences, mainly arising from interactivity, but there were also high levels of similarity.

Tablets offer new interactive tools which have the potential to transform and enhance the reading experience. However women are reading on tablets in a fairly linear way, like printed magazines. Around three-quarters read

Fig 30. AUDIENCE ACCUMULATION OF WIRED MAGAZINE: PRINT V DIGITAL



Source: GfK MRI Fall 2010 adcum and Omniture visits to digital edition, USA, 2010, cited in Scott McDonald's paper (59)

the magazine from front to back, in both formats. In digital format, the front-to-back mode can be disturbed by clicking on links, zooming in and out, and using the navigation tools to find specific content.

Also from the USA, Scott McDonald of Condé Nast reported in his 2011 conference paper *Behavioral Metrics for Assessment of Tablet Audiences & Advertising* [59] that reading of magazine digital editions on tablets strongly

resembles the behaviour long observed with printed magazines – and contrasts with the quicker, more fragmented styles of reading associated with websites.

For example, readers of the digital editions of *Wired* magazine tend to page through them from front to back, with relatively little direct navigation to stories, despite the navigation tools which make this easy. This contrasts with websites where readers are more likely to jump into the middle of a site and then exit, rather than start at the top of the site and work their way down its structure in any systematic fashion.

For *Wired* magazine, the readership accumulation curve for the digital edition is remarkably similar to that of the print edition (see Figure 30).

In-home, out-of-home

The Axel Springer iPad panel in Germany found that 99% of panel members used their iPads at home, and no less than 89% also used them away from home. Thus the iPad was highly mobile. However this concerns total use of the iPads, not digital magazine reading specifically.

The Meredith/MediaVest study in the USA gave a different impression, commenting that digital magazines are mostly read at home. Portability is within the home, moving from room to room, rather than outside the home. Overall, print editions are more 'mobile' than digital editions – that is, reading magazines outside the home is more common in print.

Tablets are changing consumers' expectations and behaviour

A conference paper in 2011 called *What's New For News?* by Gregg Brussel (BBC Worldwide America) and Kate Sirkin (Starcom MediaVest Group) [60] gave some insights into the way tablets are changing consumers' expectations and behaviour. The paper reported on qualitative and quantitative interviews in the USA in 2011 with tablet owners who consume news content on their tablets (which means nearly all tablet users).

"As tablets blend easily into our lives, they are offering more than just portability and convenience. Users indicate they are exploring more, accomplishing more with greater efficiency, and having more fun along the way. Rather than simply replacing or replicating existing behaviour on other platforms, tablets are helping us to evolve – creating new behaviours and expectations. We see the implication of this being that tablet users become open-minded when they experience what's possible and that this provides the opportunity for publishers and advertisers to offer content that includes an element of surprise and delight.

"The general expectation when someone gets a tablet is that it's a nice-to-have, but many people are really not sure of what they will actually use it for. We found that beyond the obvious expectation of portability, users found themselves to be much more efficient (with multi-tasking, any-time access and of course the

Fig 31 TABLETS ARE BLENDING INTO PEOPLE'S LIVES

% of tablet owners who agree:	
Frequently use a tablet while multi-tasking	64%
Use a tablet in the home a lot more than anticipated	59%
Tablets have become a seamless part of daily life and routine	55%
Use a tablet much more than I thought I would	53%
Use a tablet outside the home a lot more than anticipated	40%

Source: *What's New For News?*, Brussel & Sirkin, USA, 2011

apps), and also to be fun (Figure 31). The sheer ease of swiping between apps, the variety and quality of the apps, and the reliability of the product made them a joy to use, and has created an anticipation of a very exciting future.

"Our relationships with media evolve once a tablet is used. There is a significant amount of multi-tasking. Almost half the sample increased their overall hours with media each day, driven in part by the recognition that 'tablets allow me to have new and different experiences with content on TV, online and print'.

"People are creating their own story arcs, following stories across platforms as 'living' and evolving content – and experiencing deeper

and more human connections with news. Tablet behaviours also lead consumers to partner with the content providers they know and trust. The implication is that trusted brands have a new opportunity to give users 360 degree experiences with content. More than just making content accessible on all platforms, this is about creating a continuous experience.

"We move from a world where there is a top down linear hierarchy of news where people are passive recipients with 'appointment viewing' of one platform at a time to multi-layered two-way interactions, and pro-active explorations of news 24/7."

Sanoma Media's *European iPad Survey* was another source to give indications of the iPad causing changes in users' behaviour. The iPad has had an effect on how other devices are being used. 73% said they use their laptop or desktop computer less, and 38% said they use their mobile phone less, as a result of using their iPads.

Tablets are fun – and indispensable

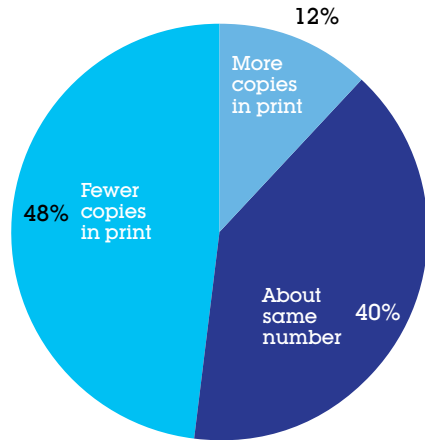
The *What's New For News?* paper by Brussel & Sirkin referred to tablet users "having more fun along the way". The Axel Springer iPad panel in **Germany** echoed that, with 62% of respondents agreeing that 'Reading a newspaper or magazine is more fun on the iPad than reading a printed newspaper or magazine'. In addition, 78% agreed that 'Apps for newspapers and magazines on the iPad create a very special multimedia experience'.

The iPad has become an indispensable and

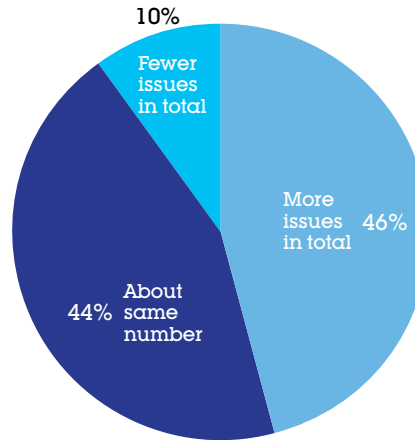
Fig 32. CONSUMPTION OF MAGAZINE CONTENT:

"Since i began reading magazines in electronic form, i am reading..."

(a) Printed magazines:



(b) Both printed and electronic form:



Source: *The Mobile Magazine Reader*, MPA, USA, 2011

constant companion. 78% of the panel agreed that 'The iPad has now become indispensable for me'. 95% agreed that 'If I were to lose my iPad I would buy another iPad'. 53% agreed that 'When I am on the go, I (almost) always have my iPad with me'.

62% surfed the internet more often since they acquired their iPad. The App Store was a regular

point of contact, with 69% browsing it multiple times per week, and another 25% multiple times per month. 70% of the panel already had 10 or more paid-for apps on their iPads; the average was 20 paid-for apps. On average, they had already spent 101 euros on paid-for apps, up to the time of the interview.

Digital editions increase total consumption of magazine content

One of the ways in which digital editions change behaviour is that they tend to increase consumer's total consumption of magazine content across all platforms.

The MPA's *Mobile Magazine Reader* in the USA revealed that after respondents began reading electronic versions of magazines, there was a net migration from print to digital among these respondents, but crucially their total consumption of magazine content had increased – as shown in Figure 32.

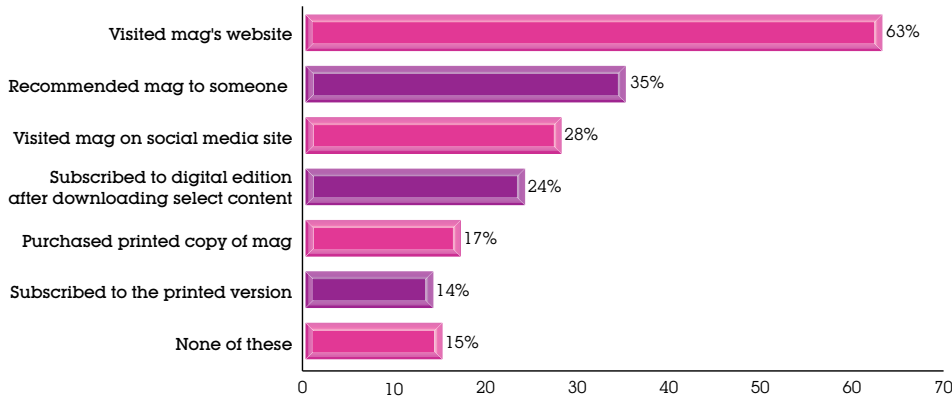
The Axel Springer iPad panel in Germany supported this conclusion. The iPad had opened access to a wider audience, and intensified the consumption of publishers' content. 68% of panel members agreed that 'I read some newspapers or magazines as an app on the iPad that I have not read as a printed edition up to now', and 52% agreed that 'Since I have the iPad, the overall total of newspapers and magazines (as an app or printed) that I read is higher than before'.

Engagement

Some of the results cited earlier in this chapter reflect users' deep engagement with their tablets and the magazine content on them. This section adds further evidence about engagement.

The Meredith/MediaVest study by Britta Ware and others in the USA reported that, while personally relevant content remains the most compelling content regardless of format,

Fig 33. ACTIONS TAKEN AS RESULT OF READING DIGITAL MAGAZINES



Source: The Mobile Magazine Reader, MPA, USA, 2012

interactive elements within digital editions are seen as exciting and absorbing. The interactivity that digital editions offer can be a powerful means of enhancing involvement and the total reading experience.

The Adobe analysis found that, **worldwide**, interactive features such as web views, videos, slide shows, audio and so on, heavily influence engagement. Readers interacted with 48% of all the interactive features in the apps. Web views and video are the two formats that captured the most interaction, said Adobe. And every fifth

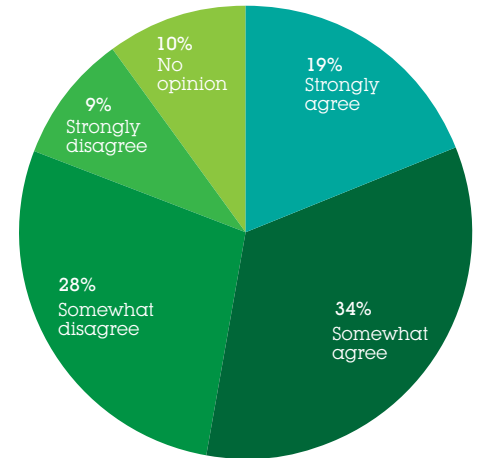
page viewed is an advertisement. An app gets opened up to five times per month, on average.

The *What's New For News?* paper by Brussel & Sirkin in the **USA** reinforced this, commenting that tablet users are enthusiastic, unusually engaged, and loyal to certain apps. Opportunities to further engage these users entail offering more evolving and interactive content.

Another sign of engagement is action taken. *Mobile Magazine Reader* found that, in addition to reading, 85% of respondents had taken some other action as a result of reading digital magazines. The

Fig 34. ELECTRONIC VERSUS PRINT

"I prefer reading the electronic versions of magazines versus printed copies"



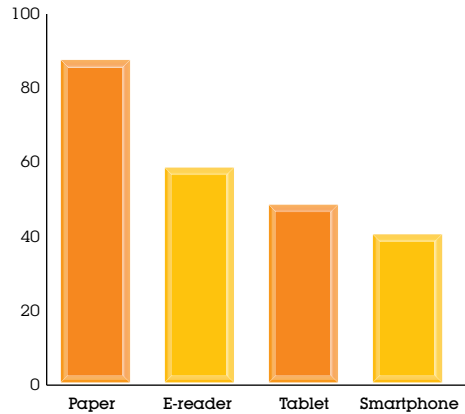
Source: The Mobile Magazine Reader, MPA, USA, 2012

most common actions were visiting the magazine's website (63%), recommending the magazine to someone (35%) and visiting the magazine on Facebook, Twitter or other social media site (28%). Figure 33 gives further details.

Actions concerning advertising are discussed in the next chapter.

Fig 35. **HIGHER SATISFACTION WITH READING IN PRINT**

% who are "extremely/very satisfied" with reading magazines on (device/paper)



Source: *Content Consumption in the Digital Age*, Harrison Group, USA, 2011

Preferences for print or digital editions

On balance, consumers who read magazines in digital form tend to prefer electronic versions of magazines to printed copies, but it is not an overwhelming verdict. Figure 34 shows results from *The Mobile Magazine Reader*. 53% agree that they prefer digital form but 37% disagree.

85% of digital consumer magazine readers

were 'satisfied' or 'very satisfied' with their digital experience, according to Texterity/BPA Worldwide's *Certified Profile of the Digital Edition Reader* in the USA in 2010 [61].

However the evidence is not all one-way. Another American survey, *Content Consumption in the Digital Age*, by the Harrison Group in 2011 [62], found markedly higher satisfaction levels with reading in print than with any of the three specified kinds of digital device (Figure 35). Nearly 90% of magazine readers were "extremely" or "very" satisfied with the experience of reading in print, a much higher proportion than for readers using e-readers, tablets or smartphones.

As usual, there are positives and negatives to consider – exemplified by the *Viva Ad Impact iPad Survey* in the Netherlands. Positive reactions from individual users of the *Viva* app included "It's *Viva* in heart and soul!", "A lot of fun", "*Viva* keeps up with the times!", "it's always with you" and "innovative". Among the negatives were that the interactive elements were not always obvious to the users, who therefore missed some of them or felt some annoyance at difficulties they experienced. Another drawback mentioned was that "You cannot pass it on to someone else".

Why print will co-exist with digital formats

The US Meredith/MediaVest paper, *Guidelines for Maximising the Value of Tablets versus Print Magazines* by Britta Ware and others, which compared digital and print editions of Meredith magazines among female iPad owners in 2011,

described why the authors thought print will continue to co-exist with digital formats.

» The permanence of paper:

→ "Reading a printed magazine is substantial. Unlike an online experience where images seem to quickly appear then disappear – an ephemeral experience – a print magazine feels more permanent. It feels more like a valued and valuable possession. A print magazine is more like a friend whereas an online magazine is more like a casual acquaintance."

→ "I can tear out the pages and put them in a folder for ideas for the future."

→ "It's easy to have the magazine lying open so I can follow along with the exercise routines."

» The appeal of paper:

→ "There's something about opening a magazine, freshly printed – the smell of it. There's just something about holding it in your hands and sitting on the couch... the opportunity it gives you to relax."

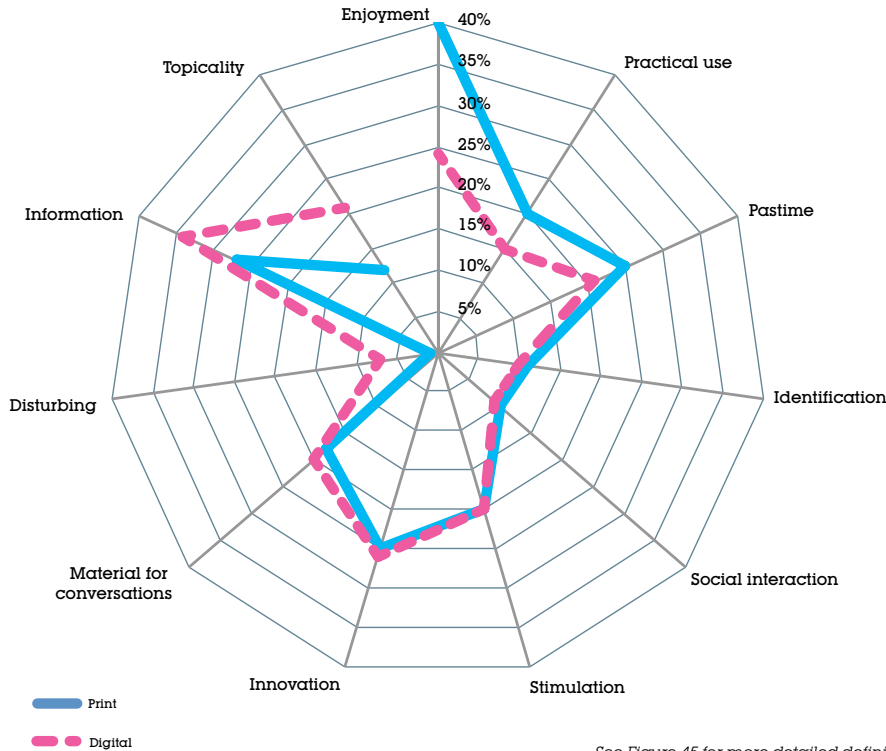
→ "There is just nothing like having a piece of paper in your hands."

» The shareability of paper:

→ "I can pass it to a friend and share the information with them too."

Print and digital complement each other; neither will disappear. The digital format offers a new and

Fig 36. COMPARISON OF PRINT & DIGITAL FORMATS FOR MAGAZINE CONTENT



See Figure 45 for more detailed definitions
 Source: Media Experience Survey, TNS NIPO/NUV, The Netherlands, 2012

different way for consumers to interact with their favourite magazines.

One survey respondent said “It combines many fun elements. It is similar to reading your favourite magazine while watching your favourite TV show because not only can you read articles but you can watch clips. It is also like having a library at your fingertips to explore more information on many of the topics in the magazine. Pictures and colours are amazing. It is a unique entertainment experience.”

Another respondent remarked “It makes reading more enjoyable and informative. So many times when you read a traditional magazine you may see something that might catch your eye and you think, oh I should look that up later, but then you never do. This makes it so easy to do just that. I also love the ability that I can keep numerous issues with me at all times. I always have something to read.”

The Media Experience Survey, conducted by TNS NIPO Netherlands and published by the NUV Dutch Publishers Association in the Netherlands in 2012 [63] gave a fresh viewpoint on the differences and similarities in the satisfactions derived from publishers' print and digital offerings. Here, digital means PCs, tablets and mobile phones. A spidergram (Figure 36) showed that the principal distinctions are that print is more oriented towards enjoyment/relaxation while the same publishers' digital content is more notable for topicality and information. Otherwise the prime impression created by the spidergram

is how similar the plots are for print and digital in most respects - in 8 out of 11 factors. Also notable is that disturbing, worrying content is negligible for print, and very low for digital.

Publishers' audience profiles trending towards digital

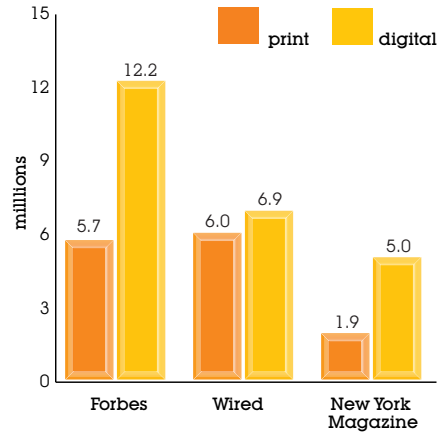
The remarkable strengths of tablets, websites, smartphones and social media in presenting magazine content, and consumers' enthusiastic acceptance of these new means of delivery, means that for publishers there is a dramatic and continuing shift in profile towards digital audiences - without necessarily reducing the print audience. This is well illustrated by data in the USA from Affinity Research's *American Magazine Study* and comScore's *Media Metrix* service [64].

Looking at the ten largest multi-title magazine media companies, the proportions of their total audiences reading some or all of their magazine content on digital platforms ranged from 15% to 45% in Fall 2011, and averaged 30% across all ten companies. These proportions are growing. The digital platforms included were magazine websites, tablets, smartphones, other mobile devices, social networks and other digital delivery.

The analysis also showed the print and digital audiences of the two largest magazine companies by total audience, aggregated across all their magazine brands. For one of these companies the proportion of its total audience using only print had become as low as 55%, while

Fig 37. DIGITAL AUDIENCES SURPASS PRINT AUDIENCES

Total audience



Source: *American Magazine Study*, Affinity Research, Fall 2011; *comScore Media Metrix*, 2011

THE EMERGENCE OF THE
TABLET HERALDS ONE OF THE
MOST TRANSFORMATIVE AND
EXCITING PERIODS IN THE
HISTORY OF MEDIA.

*Nina Link, president and CEO of MPA The
Association of Magazine Media, USA*

15% was using digital only and the remaining 30% was using both print and digital. For the other company print-only accounted for 65% of total audience, digital-only was 11%, and 24% were using both platforms.

Digital platforms bring in new audiences for magazine brands, as well as leading some existing print readers to use both print and digital and others to migrate to digital exclusively. For a few magazine brands, the digital audience has already surpassed the print audience. Examples in the USA include not only magazines whose print format is an extension of a previously established web or broadcast existence (such as *ESPN The Magazine* and *Food Network Magazine*) but also a number of brands whose origins are in print. Three examples are shown in Figure 37. All three of these brands were publishing information via websites, smartphone apps, tablet apps, e-reader apps and social media networks.

All in all, this indicates a very healthy future for magazine media. ●

5

Impact of ads in digital formats

Trust in a print magazine brand rubs off onto the magazine's website. Magazine digital editions attract very desirable target audiences, who are receptive to the advertising. The more interactive the ads, the more likely they are to be entertaining, informative and persuasive. On social media, magazine publishers can take advantage of the strong relationships and trust their brands create with their customers.

Evolving into multi-platform content providers, magazine publishers are finding that their digital output is yielding attractive audiences for advertisers - audiences who respond positively to the advertising. This chapter is divided into three main sections: **WEBSITES, DIGITAL EDITIONS** and **SOCIAL MEDIA**.

Websites

The importance of trusted brands

In digital media, as in printed magazines and other long-established media, trust is a key element. In the UK the *New Rules of Engagement* study published by the Association of Online Publishers (AOP) in 2010 [65] investigated which dimensions of website engagement had the strongest relationship with consumers' behaviour towards advertising. They found that the dominant dimension was trust. In this respect, original content sites were seen to perform well

ahead of portals and social networking sites. AOP commissioned a follow-up study called *The Value of Trust*, conducted by comScore and published in January 2012 [66]. It compared original content websites, portals and social networks, and concluded (Figure 38) that:

- » The higher levels of trust in original content sites rubs off to create a higher degree of affinity and trust in the advertisers who appear in those environments
- » Advertising on original content sites is

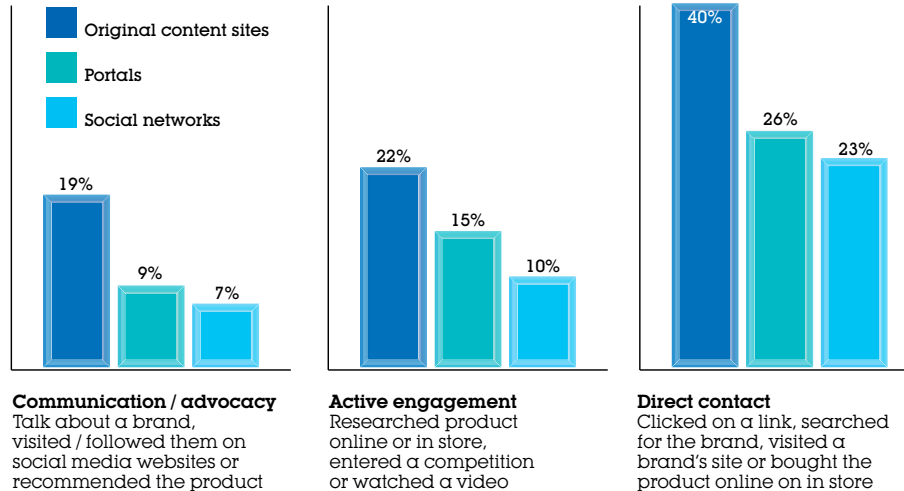
measurably more effective than portals and social media in delivering on all stages of the purchase cycle from awareness to purchase

- » Users exposed to ads on original content sites are more likely to visit the advertiser's site and/or search for the advertiser's brand than those users exposed to portals or social networks

Examples of the 'trust effect' for online display advertising include websites from magazine media, where the consumer trust invested in those

Fig 38. **THREE ONLINE PUBLISHING ENVIRONMENTS**

Actions taken after seeing display ads



Source: *The Value of Trust, AOP, UK, January 2012*

magazine brands rubs off onto the advertisers.

AOP concluded that "it is vital that media planners consider consumer trust levels in each placement they use. Original content sites continue to earn the highest levels of consumer trust versus other categories of online publisher, and consistently outperform those publisher

categories in their ability to impact consumer attitudes and actions. Post-campaign evaluation metrics should also reflect the level of trust in environment and brand, which we suggest is an additional valid metric for measuring campaign success and is currently largely ignored."

The French survey *L'Efficacité Print + Web*,

PANEL 4

PRINT + DIGITAL: CASE STUDIES FROM RINGIER AXEL SPRINGER POLSKA



"TEST THE FIAT"

In 2011 the Fiat Corporation in Poland conducted a cycle of outdoor events to recruit consumers to test and report upon two Fiat models – the 500 Twin Air and the Freemont.

A contest was held, promoted using Ringier Axel Springer Polska print brands *Auto Swiat*, *Fakt* and *Newsweek*, and six magazine websites. Contestants completed a questionnaire, from which four consumers were selected to have a car for a one week test, and a weekend-long stay in a luxurious hotel for the tester and family.

Journalists from the motoring weekly *Auto Swiat* recorded the opinions of the testers, and these plus photographs and video materials from the tests were used during a subsequent advertising campaign.

The objective of the campaign – encouraging print and website users to engage with the "Test the Fiat" promotion - was achieved:

- » The panel received 325 correctly filled contest applications



- » There were more than 6,000 visits to the contest's microsite, by 3,786 unique visitors
- » Visitors spent more than 5 minutes on the site on average
- » The reach of the press campaign exceeded 5 million

125 YEARS OF BOSCH

In 2011 a campaign for Bosch in *Auto Swiat's* magazine, website and iPad app, celebrating 125 years of Bosch providing components for the motor industry, attracted 25,000 visits to the microsite and 750 downloads of the iPad app, while 12,000 copies of a Bosch publication *125 Years of the Automotive Industry* were requested.

PROMOTING FEMALE ENTREPRENEURSHIP

In 2011 the project 'Your Business' ran a campaign in *Newsweek*, its supplement *Newsweek Kobieta* and its website *Newsweek.pl*, encouraging women to set up their own businesses.

A contest invited women to prepare a business plan for their planned businesses, with the winner receiving 25,000 zlotys from the BPH Bank. *Newsweek's* website provided help in its preparation. More than 200 business plans were received, regarded as exceptional considering the work involved in preparing the business plans.

Source: Ringier Axel Springer Polska, Poland, 2011 (67)

published by SPM La Presse Magazine in 2011 [44] and described in Chapter 4, showed how the trust embedded in print brands is carried across to their websites. 71% of respondents agreed that "I feel just as much trust consulting a newspaper/magazine website as when I read the newspaper or magazine itself". Other statements highly relevant to advertisements on publishers' websites included "I can share important information with those close to me" (74% agreed) and "I can go further and deeper into a subject" (73% agreed).

Polish case studies

Panel 4 summarises three successful case studies from **Poland** using publisher Ringier Axel Springer Polska's print and digital properties in combination. Panel 5 summarises a **Polish** case history from publisher Agora S.A., using print and web.

Visibility of online ads: only 69% are 'in view'

One problem about internet advertising is that not all ads that are served end up being seen by the user.

To provide a measurement of this, comScore announced in January 2012 the launch of its Validated Campaign Essentials (vCE) product, which can assess the extent to which individual online ads are actually exposed in front of users' eyes ("delivered in-view", meaning that at least 50 percent of the ad must be viewable for at least 1 second), in the right country or market, in a

PANEL 5

PHOTOGRAPHIC COMPETITION RUN THROUGH MAGAZINE WEBSITE

Herbitussin throat and cough drops ran a campaign in Polish women's weekly magazine *Wysokie Obcasy* and its website, in November-December 2011. To emphasise the natural character of the products, a competition was run in the *WysokieObcasy.pl* website for visitors to show, through photographs, what the power of nature meant to them. The winning photographs were to be featured in a special Herbitussin calendar for 2012. 4,125 entries for the competition were received, which was considered a very successful result.

Source: Agora S.A., Poland, 2011 (68)



brand-safe environment and absent of fraudulent delivery. The method utilises tagging of ads.

vCE's validated impressions can be expressed as 'validated gross rating points', or vGRPs.

To better understand the quality of online ad delivery, in December 2011 comScore conducted a USA-based vCE Charter Study [69], which

involved twelve national brands (including Ford, Chrysler, Kellogg's, General Mills and Kraft), 3,000 placements, 381,000 site domains and 1.7 billion ad impressions.

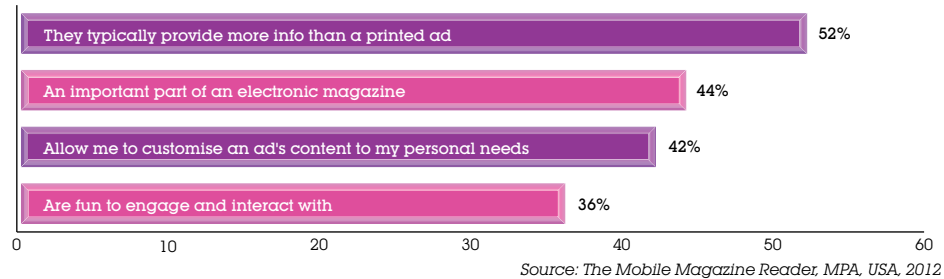
Averaged across all twelve campaigns measured, 69% of the ad impressions were classified as being 'in-view.' The remaining 31% were delivered but never seen by the consumer, generally through the consumer scrolling past the ad before it loaded or a consumer never scrolling the ad into view (for example, if the ad was below the bottom of the screen and the user didn't scroll down). In-view percentages varied by site and ranged from 7% to 100%. The average ad which was seen was in-view for 16 seconds.

An average of 4% of ad impressions were delivered outside the desired geography, but individual campaigns ran as high as 15%. In many cases, ads were served in markets where the advertised product was not sold, meaning wasted ad spend.

With only 69% of online ads 'in view', it becomes important to build this factor into campaign evaluation.

Fig 39. ATTITUDES TO ADS IN DIGITAL MAGAZINES

% agreeing with statement



Digital editions

Desirable target audiences

Digital editions, whether as replicas of a print edition or as apps, attract very desirable target audiences for many advertisers. The previous chapter established that there is a striking consistency of findings across a wide range of countries: typical readers of digital editions of magazines, and owners of tablets, have above-average incomes, are better educated than the general populations, and are skewed towards the younger end of the age range.

Users of digital editions also show in another way that they form a premium audience: they are willing to pay significant sums to subscribe

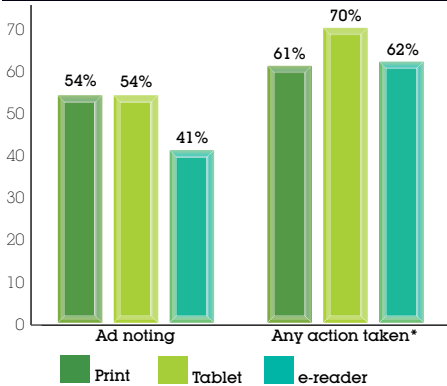
to digital editions. This is of course in contrast to expectations concerning websites, where consumers generally expect content to be free.

In addition, as this chapter will show, magazine digital audiences are very receptive to advertising messages on their devices, especially those advertisements with interactive elements.

Receptive to ads in digital editions

Just as in printed magazines, in digital editions consumers are receptive to advertising which is relevant to them. The MPA's 2012 report *The Mobile Magazine Reader in the USA* [49] found considerable agreement with positive statements about the advertising – shown in Figure 39. Many readers agree that the ads typically provide more information than those in print, and users can

Fig 40. COMPARISON OF PRINT, TABLET & E-READER ADS



*Base: those who noted ad. Actions taken include visiting advertiser's website, speaking to someone about product/service, purchase consideration, purchase, etc.
 Source: *Measuring the Effectiveness of Ads in Digitally Delivered Magazines, May-August 2011, GfK MRI, USA, 2011*

focus their attention on the elements of most relevance, thus in effect customising the ad's content to their personal needs. More than a third agreed that the digital ads "are fun to engage and interact with". Consequently the ads are an important part of a digital edition's content.

Yet most readers regard most of the ads as annoying: 71% agreed that "I find that electronic ads are usually pretty annoying". This is essentially

referring to ads which don't strike a chord with the consumer, and are thus perceived as interruptions to reading. But those ads which strike that chord are acted upon. 73% of readers have read or tapped on advertisements in digital editions.

Moreover most readers would like to not only learn more about products through the advertising, but also to be able to buy directly from the screen. 59% agreed that "I would be interested in the ability to purchase products and services directly from the advertisements I see in electronic magazines".

Ads in digital editions match or better the performance of print ads

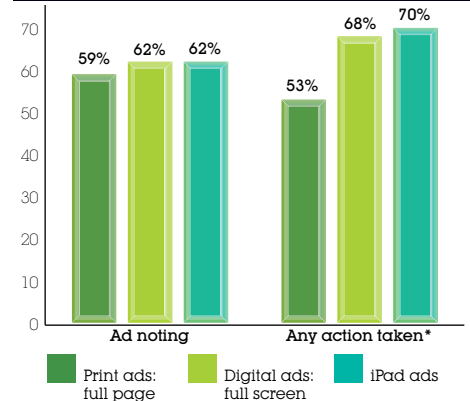
Magazine advertisements in digital form produce responses which are broadly similar to, or better than, responses to ads in printed format.

GfK MRI in the USA used their Starch ad effectiveness service (for printed magazines) and Starch Digital (for tablets and e-readers) to make comparisons based on May-August 2011 fieldwork. Results were reported in a conference paper *Measuring the Effectiveness of Ads in Digitally Delivered Magazines* by Mickey Galin and others [70].

Figure 40 gives averages for print and digital editions of magazines. The average ad noting scores show that ads were recalled in tablet and paper editions to about the same extent, and rather more than ads in e-readers.

The action taken question is asked as a follow-up about those ads that a given respondent

Fig 41. COMPARISON OF PRINT AND DIGITAL ADVERTISEMENTS



*Base: those who noted ad. Actions taken include visiting advertiser's website, recommending product/service, purchase consideration, purchase, tap/click digital ad, visit store/dealer, etc.
 Source: *Affinity's VISTA (print), Jan 2009-Dec 2010 and VISTA Digital, Jan-Oct 2011, USA*

recalled seeing (noted). Possible actions taken include visiting the advertiser's website, speaking to someone about the product/service, purchase consideration, purchase, and so on. The results indicate that ads in paper editions and e-readers provoke very similar levels of action among noters, while tablet ads generate rather more action because (as other data hinted) the tablet

ads tended to be more interactive.

In terms of absolute levels of action taken, the figures for all platforms (more than 60% of noters taking action) was impressive.

Analysis of ad noting by product category showed that the familiar variations by category for print advertising were replicated by tablet ads. That is, tablet ads and print ads recorded roughly similar average noting scores, category by category.

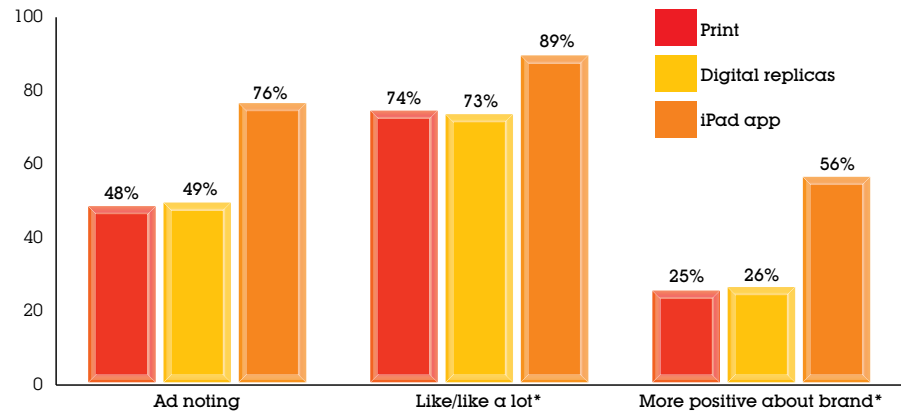
The VISTA Digital tracking service from Affinity Research in the USA also provided norms for digital magazine ads on mobile devices (Figure 41). Based on January-October 2011 fieldwork [71], the average ad recall for full page digital ads, and the subset of iPad ads, was 62%, a shade higher than for print ads (59%). It is in terms of actions taken by those who noted the ads that digital ads (68%), and iPad ads in particular (70%), rose well above the levels recorded for print ads (53%).

There is some variation in the norms according to which interactive features are included within the digital advertisement, but the variations are not large. Ads featuring a downloadable app achieve the highest average noting score (69%), followed by ads with 360-degree views (67%) and ads with a social media link (65%) - compared with the full screen ad average of 62%.

Although Starch and VISTA did not use identical research techniques, they did agree on two major conclusions – that on average:

- » Digital ads match or slightly better the levels of ad noting achieved by print ads; and

Fig 42. COMPARISON OF PRINT, DIGITAL REPLICA & IPAD IN-APP ADS



*Base: those who noted ad.

Source: Advertising Best Practices in a Multi-Platform World, Hearst Magazines/Ipsos, USA, 2011

- » Digital ads on tablets generate even higher levels of action than print ads (no doubt largely because of the interactive features built into most digital ads).

In-app ads outscore print and digital replica ads

A study by Hearst Magazines in the USA was particularly concerned about the distinction between digital advertisements accessed through an app, and those which were digital replicas and

thus closer to print versions. Hearst commissioned research through two Ipsos research agencies. Results were reported in a 2011 conference paper *Advertising Best Practices in a Multi-Platform World* by Marlene Greenfield and others [72].

The research studied two magazine brands, *Food Network Magazine (FNM)* and *Esquire*.

The aim was to compare advertisements for the same advertisers on three platforms: paper, digital replicas, and interactive iPad apps. Nine advertisers were covered.

PANEL 6

DIGITAL ADVERTISEMENT BEST PRACTICE

1. Advertising is welcomed, especially in iPad apps. Don't hide from being an ad; focus on being a good ad that stands out from the editorial content.
2. Signpost interactivity. In-app ads should use clear and intuitive signposting by providing obvious interface cues that guide the user through the experience and provide a straightforward gateway to deeper content.
3. Inform and entertain. The in-app format allows advertisers to link to a large amount of content, but the most impactful ads combine this additional content with an engaging, entertaining and rewarding experience for the reader.
4. Print and digital replicas are two formats in one. To publishers the digital replica may represent a unique delivery format but to the reader it's still fundamentally a magazine. Same content, same advertising. It leads to the same positive response to ads in both formats.
5. Attract and entertain. Unlike the in-app version, print and digital replica advertisements are not expected to entertain; they should simply catch the reader's eye and provide information that is new, interesting, relevant and useful.

Source: *Advertising Best Practices in a Multi-Platform World*, Hearst Magazines/Ipsos, USA, 2011 (72)

"TABLETS COMBINE SEVERAL BENEFITS OF DIFFERENT MEDIA FOR ADVERTISERS: QUANTIFYING BEHAVIOUR AND TARGETING LIKE THE INTERNET, ATTRACTIVE DISPLAY ADVERTISING LIKE A PRINT MAGAZINE, RICH MEDIA LIKE TELEVISION, AND THE POTENTIAL FOR INTERACTIVITY, SHARING AND VIRALLY SPREADING THE WORD AS WITH SOCIAL MEDIA."

Chuck Lenatti, journalist, USA

Advertisement noting in print and in digital replicas was approximately the same, on average. However ad noting of in-app advertising was much higher – as Figure 42 shows. One might perhaps expect higher recall of the ads in the apps because of their rarity, but the weight of the survey's evidence indicated that it was primarily due to their interactive nature.

It was similar with 'liking' of the ads among those who recalled them. Figure 42 shows that all three formats achieved high levels of engagement, as measured by liking, but apps comfortably outscored the other two formats.

All three formats led some respondents to agree that they felt 'more positive' about the brand as a result of seeing the ad, but the iPad in-apps ads were especially impressive, more than doubling the scores (Figure 42).

iPad apps maintained a substantial gap over digital replicas and print for a number of other attributes too: 'entertaining', 'clever', 'memorable', 'surprising', 'useful' and 'informative'. The ability of apps to interactively provide greater additional information and entertainment must account for much of this increase, with the novelty of using a

PANEL 7

GOLDEN RULES FOR ADVERTISING ON TABLETS

■ MAKE CONTENT RELEVANT

Create connections to the surrounding editorial content and to users' personal interests

■ INVITE IN WITH IMMERSIVE VISUALS

Create an immersive and visually engaging experience. Interactivity is very important. Full-screen video and other visuals are welcomed when the content is substantial enough to entertain/interest

■ POSITION AS PARTNER

Play up the advertiser's role as a sponsor or provider of the surrounding content

■ BE NON-INTRUSIVE

Allow people to select the depth of brand and content engagement they would like to have, when they want it

Source: *What's New for News?*, Brussel & Sirkin, USA, 2011 (60)

PANEL 8

COMMENTS ON DIGITAL EDITION ADS

- ♥ "I like ads that look like the company really took time constructing it. I love when I see vibrant colours, pictures, or something that will grab my attention."
- ♥ "The ad is unobtrusive, and suggests that the brand is part of the experience, not just something randomly splatted onto the page."
- ♥ "The BBC is a well respected brand name and therefore any form of advertising on their site will be taken seriously."
- ♥ "Good that it does not interfere much with content, you can decide if you want to expand the ad to see full information."
- ♥ "I like how you can maximise the ad to learn more, or if you want you can just ignore it."
- ♥ "I appreciate that the ad seemed to be created especially for a tablet. It made me feel like this brand really thought about the best way to utilize tablet advertising."
- ♥ "I found myself wanting to click the blue arrows (play buttons) on the ads. I love how interactive it is. These ads are fun, exciting, innovative, and extremely informative. I think this is an amazing advancement in advertising."

Source: *What's New for News?*, Brussel & Sirkin, USA, 2011

tablet and its apps possibly contributing too.

The authors concluded their report by suggesting some best practices for each delivery format – summarised in Panel 6.

Another study of tablet in-app advertising agreed that iPad in-app advertisements add to the overall reading experience which users enjoy. The 2011 conference paper *What Consumers Really Want: Neurometric Response to iPad Magazine Advertising* by Betsy Frank of Time Inc and others [73] reported on qualitative and quantitative research, including eye tracking. The survey examined three magazine apps, among iPad users. The interactivity of in-app advertisements enhanced readers' involvement, and the more seamlessly the advertising was aligned with the editorial content the greater the chance of it grabbing attention and interest.

Readers have high demands of tablet advertisements

People are receptive to tablet advertisements but their demands are high. Publishers and advertisers have a unique opportunity to partner in ways that enhance the tablet experience and take it further (rather than interrupting it).

That was a conclusion of the 2011 study *What's New for News?* by Gregg Brussel (BBC Worldwide America) and Kate Sirkin (Starcom MediaVest Group) [60]. The paper reported on qualitative and quantitative interviews in the USA in 2011 with tablet owners who consume news content on their tablets (which means

nearly all tablet users).

The authors wrote "People are intrigued and excited by ads which take advantage of capabilities and features unique to tablets. They look for advertising to invite them in, be relevant, immersive, interactive, and browsing-oriented. Consumers are very open to brands communicating with them on these devices within their trusted brands."

The study led the authors to create four golden rules for engaging with readers on tablets – see Panel 7.

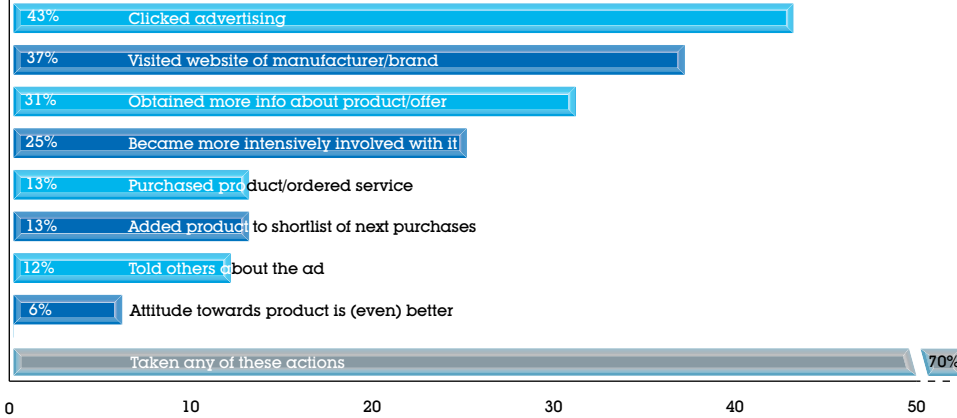
Brussel & Sirkin reported that tablet users are in a swiping, connecting, multi-tasking, discovering mode and generally being wow-ed by what is on the screen. They feel let down if a piece of content – whether editorial or marketing message – does not fit that mode.

A selection of verbatim comments from respondents is shown in Panel 8.

Advertising within digital formats can successfully connect with readers (as is the case in print), yet each format offers the reader a unique experience. That was the conclusion of *Guidelines for Maximising the Value of Tablets versus Print Magazines*, the Meredith/MediaVest conference paper [57] which compared digital and print editions of Meredith magazines among **American** female iPad owners in 2011. For digital ads, a common theme among respondents was the attraction of the interactivity – watching a video, entering a sweepstake, looking at pop-up recips, and so on.

FIG 43. ACTION TAKEN AFTER SEEING IN-APP ADS

"What have you ever done after seeing an advertisement in an app?"



Source: iPad Media Impact Study, by Axel Springer, Germany, 2011

Advertisements on iPads stimulate action

Axel Springer's iPad Media Impact Study of 2011 in Germany [54] found that advertising within the iPad editions was actively used and could animate people towards purchase. Panel members were asked "What have you ever done after seeing an advertisement in an app?"

70% had taken action of some kind (Figure 43). Most of the actions concerned researching the products and getting more involved with them. A minority had made a purchase, or shortlisted it for the next purchase. Some had spoken to others about the advertising.

In the Netherlands the Viva Ad Impact iPad

Survey, commissioned by Sanoma Media in 2011 [58] and conducted among women who had read the iPad edition of Viva magazine via the app, showed that iPad ads can perform well compared with print ad norms. The impact of three iPad advertisements was tested. Key measures included branding power of the ads and 'overall judgement' of the products.

The results showed that the kind of variation in ad impact scores which is familiar from print ads - some ads perform very well, some poorly, some above average and some below - also applies to iPad app advertisements (Figure 44). Ad number 1 outperformed the average for print ads, for both branding power and overall judgement. Ad 3's scores were well below the print norms. Ad 2's scores were in between the other two. In this sense, the digital ads (taken as a whole) were behaving rather like print ads. The digital ads' variations from one to another were almost certainly for the same kinds of reasons which cause variations among print ads - width of interest in the product category, quality and appeal of the creative work, and so on.

Creative work in tablet ads needs to be more creative

Mention of the creative work is a cue for the observations by Kantar Media, USA, in their report Top 10 Insights For Magazine Tablet Advertising, published in April 2012 [74]. Kantar analysed the print and iPad advertisements carried in the January 2012 and February 2012 issues of 52

"IN TODAY'S TRANSACTIONAL WORLD, YOU HAVE TO PRODUCE MORE THAN AN AD, YOU HAVE TO PRODUCE AN EXPERIENCE."

Bill Wackermann, Condé Nast publishing director for Glamour and W

Fig 44.
IMPACT OF 3 IPAD ADVERTISEMENTS

	Branding power	Overall judgement*
iPad ad 1	74%	6.7
iPad ad 2	48%	6.5
iPad ad 3	8%	5.5
Print ad norm	64%	6.5

*On a scale of 1-10. Base: ad noters among female readers of Viva iPad edition. Source: Viva Ad Impact iPad Survey, Sanoma Media, The Netherlands, 2011

magazines. They found that “the majority of the tablet magazine ads were near replicas of their print counterparts. In general, most magazine tablet ads were repurposed print creatives without elaborate animations or advanced interactive features, other than links to the advertisers’ websites or social media pages”. In addition, “more often than not, the orientation of the ad did not change when the tablet was rotated.”

Print-sourced replica digital creative work does perform as well as print ads, as the previous sections have shown, but they do not take advantage of the new possibilities offered by tablets’ interactive facilities. As stated earlier, publishers and advertisers have a unique opportunity to partner in ways that enhance the tablet experience and take it further – an opportunity which most advertisers were not taking advantage of in early 2012.

Only a minority of the digital ads monitored by

Kantar incorporated deeper immersive interactive elements, such as video clips, interactive games, entertaining devices such as music playing when the iPad is shaken, image galleries, animations, test drives, and so forth.

If the general level of creative work becomes more creative, the ad impact scores will rise, users’ emotional involvement with the advertisers will grow, and readers will be nudged more readily and further along their journey towards purchase.

Tablets versus smartphones

Advertising is more memorable, acceptable and enticing on tablets than on smartphones, according to *UK Connected Devices*, a report by research firm Nielsen in the UK in March 2012 [75].

UK users agreed that ‘advertising is more acceptable’ on their tablet (40%) than on their smartphone (30%). Users remember ads better on their tablet, with 48% recalling seeing an ad on their tablet ‘about once a day’ or more often, compared to 37% on their phone. Ads shown on tablets may also have a stronger impact than those appearing on smartphones, due to the larger screens of tablets, particularly iPads.

10% of tablet users said they have made a direct purchase through their tablet, while 7% of smartphone users had done the same on their phone (but note that this difference is too small to be statistically significant).

Nielsen commented that their report shows that tablets are changing consumer behaviour and presenting great potential for advertisers.

Social media

The report *Social Media Futures*, published by the Institute of Practitioners in Advertising in the UK in 2009 [76], said “In the era of social media (social networks, blogs, virals etc) consumers will increasingly mediate messages between brands and other consumers in the social media arena... Permission-based advertising could become the norm and understanding this is vital for success... Brands will have to earn the right to be in this space. Success will be measured by the degree to which a brand is allowed to blend in with the conversations that are going on, with or without it, calling for a more subtle softer drip-feed approach. Furthermore, both clients and agencies need to develop new ways of engaging consumers in the communications process. For example brands must appear more ‘humble’, and creativity and innovation need to be at a premium. A more integrated, holistic approach needs to be developed so that network communications is viewed as an integral part of the mix. Clients and agencies must develop new ways to incorporate and engage consumers in ways that reinforce brand values and build trust.”

The traditional media play a part in this process, and magazines are in a particularly strong position to “mediate messages between brands and consumers”. Magazines, with the strong personal relationships and trust which they create, can generate the buzz needed to give a brand some

prominence in the “social media arena”.

Publishers are experimenting, expanding and enhancing their presence on social media networks in order to extend the reach of their magazine brands across digital platforms. It is early days and there is an element of trial and error to find out what content and presentation works best. Nevertheless according to Affinity Research's *American Magazine Study* in 2011 [77] 12% of adults in the **USA** are accessing magazine-branded social media sites each month, through their computers and mobile devices. On average, they visited three different magazine-branded social networks per month. 23 magazine brands were attracting one million or more visitors per month to their social media areas.

Publishers' goals are not merely to boost the number of people who 'like' their magazine brands on Facebook, Twitter and elsewhere, or who select magazine content to pin onto Pinterest, but also to use social media to encourage consumers to visit the magazines' own websites and get involved with the brand and the advertisements there. In some circumstances it may be possible to identify the personal interests of individual visitors who come via social

media, and provide personalised information on the magazine website.

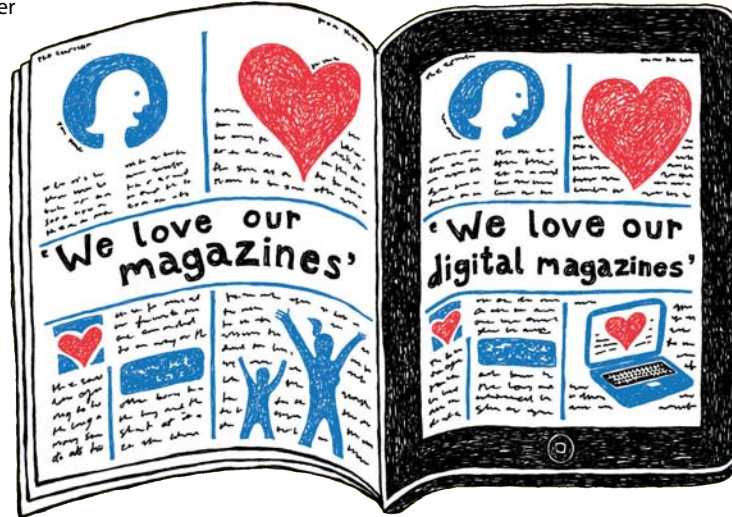
Among the limited number of research studies into magazines' social media activities, and their implications for advertisers, are conference papers describing work by John Carroll & Sarah Gale of Ipsos MediaCT in the **UK**. A *New Measure of Reader Engagement in the Digital World* [78] in 2011 described the development of a Social Heat Index, based on audience sizes and activities (posts, likes, tweets, re-tweets, etc) on Facebook and Twitter. The Index can be

calculated for individual magazine brands; the higher the score, the greater the level of engagement across Facebook and Twitter. A later paper, *Measuring magazines' social media engagement, and building an overall engagement index*, given at the FIPP Research Forum in May 2012 [79], described how the women's weekly magazines sector is using social media to connect with its audiences and how social media can provide competitive advantage in an undifferentiated market. The paper looked at the tone and themes of the conversation

around a magazine, how this can help guide social media strategy, and the relationship between social media engagement and more traditional measures of engagement.

For a general discussion of the issues in measuring social media, see the e-book published by Radian6 in February 2012, *ROI of Social Media: Myths, Truths & How To Measure* by Natalie Petouhoff [80].

Analysts in the **USA** from consulting firm Experian are saying that social media communities are becoming less about friendships and more about common interests. That's precisely what magazine brands are about – communities with common interests. Publishers are in a very good position to make the most of social media. ●



6

Comparing magazines and other media

All media have strengths, and a mix of media produces the most complete communication. Magazines' strengths are to do with engagement, inspiration, practical use, and all that flows from that – including low multi-tasking, high primary attention, more positive attitudes to advertising, and the ability to induce action and purchase.

Overview of each medium

To sketch a vision of the natural role of magazine media within a multi-channel advertising campaign, a good starting point is the *Media Experience Survey 2012 in the Netherlands* [63]. Conducted by TNS NIPO, it was published by the NUV Dutch Magazines Association in order to assist strategists' qualitative judgements about media. It examined how consumers experience and perceive different forms of media. Each medium was assessed among its own users against 11 factors.

Figure 45 shows the ranking (horizontally) of each medium against each factor.

Among the five media, magazines were ranked first on four factors. Three of these - identification (involvement, self-recognition), stimulation (enthusiasm, fascination), and innovation (surprises

me, keeps me informed of trends) – reflect magazines' ability to engage and inspire. The fourth factor was practical use (tips, motivated to do something), and it was accompanied by a second-ranking on information (something new, useful, credible). The combination of inspiration together with assistance to put the inspiration into effect (i.e. 'practical use') is a very positive one for advertisers.

Added to this, magazines rank high on enjoyment and a pleasurable way of occupying time. The fact that they demand focused attention and are often read alone explains their low ranking on social interaction.

Figure 45 also reminds us that all media have their strengths, and consequently it is a mix of several media which produces the most complete communication. Newspapers rank top in terms of topicality, pastime, material for

conversation – and disturbing emotions (the terrible news we hear every day from around the world; television ranked second on this factor). Television's best rankings (in second place) were in terms of stimulation, identification and material for conversations. Radio's great strength is enjoyment; otherwise it ranked mid-to-bottom on all the other factors. The internet was perceived by its users as the best of these five media for social interaction/keeping in contact with others. It also ranks highly for topicality and practical use.

The *Media Experience Survey 2012* also showed very positive attitudes towards the *advertising* in magazines, compared with the other four media.

Respondents were shown a list of ten attributes of advertising, and asked to say to which media they applied. Figure 46 presents the

Fig 45.
CONSUMERS' EXPERIENCE OF 5 MEDIA: RANKED

	Magazines	Newspapers	TV	Radio	Internet
IDENTIFICATION: recognise yourself in, feel involved	1	3	2	5	4
STIMULATION: made enthusiastic, fascination	1	4	2	5	3
INNOVATION: surprises me, keeps me informed of trends	1	2	5	4	3
PRACTICAL USE: tips, motivated to do something	1	3	4/5	4/5	2
INFORMATION: something new, useful, credible	2	1	4	5	3
ENJOYMENT: pleasure, relaxation, transformation	2	5	3	1	4
PASTIME: filling empty moments	2	1	5	3/4	3/4
TOPICALITY: quickly informed, ensured I'm up to date	3	1	4	5	2
DISTURBING: makes me worried, disturbs me	3/4	1	2	5	3-4
SOCIAL INTERACTION: sharing, in contact with others	3/4	2	3/4	5	1
MATERIAL FOR CONVERSATIONS:	4	1	2	5	3

Media are ranked horizontally. Survey also covered cinema, door-to-door papers, & direct mail.
Source: Media Experience Survey, TNS NIPO/NUV, The Netherlands, 2012

Fig 46.
CONSUMERS' EXPERIENCE OF ADS IN 5 MEDIA: RANKED

	Magazines	Newspapers	TV	Radio	Internet
POSITIVES:					
Felt involved	1	2	5	3	4
Made me excited	1	2	5	4	3
I found original and unique	1	2	3/4	5	3/4
Useful information	1	2	5	4	3
Has offered me something new	1	3	4/5	2	4/5
Makes me happy	1	4/5	2/3	4/5	2/3
Reliable information	1/2	1/2	5	3	4
Led me to cut out something/call or visit somewhere/visit website	2	1	3-5	3-5	3-5
NEGATIVES:					
Annoyed me	5	4	1	3	2
I found quite unclear	5	1	4	3	2

Media are ranked horizontally. Survey also covered cinema, door-to-door papers, out-of-home & direct mail.
Source: Media Experience Survey, TNS NIPO/NUV, The Netherlands, 2012

resultant ranking for the five media.

Magazines were ranked top on seven of the eight positive attributes: those concerned with inspiration (involvement, excitement, something new, makes me happy), and those concerning practical use (original/unique, useful information, reliable information). On the remaining positive factor – taking action by looking for more information (cut, call, visit) – magazines ranked second after newspapers.

Indeed these eight positives were principally a print phenomenon, because newspapers usually ranked second after magazines, and the two print media achieved 14 of the 16 top-two rankings. It was a clear indication of consumers' endorsement of print advertising compared with the advertising in the other three media.

There were two negative attributes which were asked about: 'annoyed me' and 'I found quite unclear'. Magazines ranked fifth out of five on both – that is, magazine advertising was the least annoying or unclear. The annoyance caused by TV and internet advertising was reflected in their first and second rankings.

The personal medium

A survey in **Australia** made comparisons between magazines and other media and showed that magazines stand apart as the personalised medium, the medium people turn to when they are seeking to indulge themselves in their favourite interests, the medium which gets closest to consumers. *Media Matchmaker: It's*

Fig 47. TIME SPENT WITH MEDIA PER WEEK: CZECH REPUBLIC

	Hours:minutes
TV	14:46
Radio	11:11
Internet*	7:02
Magazines: print+digital	6:10
Newspapers: print+digital	5:25
Magazines: print only	4:42
Newspapers: print only	3:05

*Excludes time reading magazines/newspapers online
Source: MML-TGI CR 2010, Czech Republic

About Relationships, commissioned by Magazine Publishers of Australia [19], examined the roles of six media. The qualitative stage of the study found that key associations for each medium were:

- » *Magazines*: personal, trends, ideas, inspiration, window shopping, indulgence
- » *Newspapers*: information, news, things you can talk about
- » *Free commercial TV*: broad, entertainment, things you can talk about, for time out
- » *Pay TV*: special interest, sport, entertainment, for time out
- » *Radio*: broad, entertainment, new music, for time out
- » *Online*: instant, information tool, ideas, social networking, window shopping

These associations were supported by the quantitative stage of the study. Respondents were shown a list of statements and were asked to say for each statement which of the six media, if any, they thought the statement applied to. Magazines scored highest on the following statements, sometimes equally with online; otherwise the other five media achieved much lower figures:

"Keeps me up to date with latest styles and fashions":

- 64% of magazine consumers agreed with this statement
- Next highest medium was free TV with 33% of TV viewers

"Inspires me with ideas":

- 54% for magazines
- Next highest: online with 37%

"Good for window shopping":

- 52% for magazines and 51% for online
- Next highest: newspapers with 30% agreeing

"Something I reward myself with and enjoy":

- 50% of magazine consumers agreed
- Next highest: 30% of online users

"The information is tailored for my interests":

- 44% of magazine readers, and 45% of online users, agreed
- Next highest: 24% of newspaper consumers

Time spent on media

A considerable time is spent reading magazines, though it is less than time spent on several other media. In the **Czech Republic**, for example, an average of 4 hours 42 minutes per week is spent reading magazines, and this rises to 6 hours 10 minutes when the digital editions are included – according to MML-TGI CR 2010 [81]. This is greater than the time spent reading newspapers, but less than the time spent on the internet, listening to the radio or watching television (Figure 47).

But what proportion of the time spent on each medium is truly focused on that medium? How much does multi-tasking affect attention to each medium? Looking merely at time spent does not show what is happening during that time.

Multi-tasking

To quote the booklet *Engagement: Understanding Consumers' Relationships with Media* published by the MPA in the **USA** [82], "It is critical to consider multi-tasking and concurrent media usage, factoring for background and foreground focus. Multi-tasking and concurrent media use are complicated because media use and activities are not compartmentalised—consumer attention flows continuously from one to the other and back again. At any given moment, one activity will have more of a consumer's attention than another."

The Time/Fortune study *Magazine Experiences Europe* [7] conducted in **France, UK and Germany** commented that "We live in a dynamic world of exploding options, and smart multi-tasking

Fig 48. MEDIA MULTI-TASKING

% who regularly engage in another medium at the same time

1 WHEN USING THIS MEDIUM...					
	Magazines	Newspapers	Radio	TV	Internet
2 ...ALSO USE THIS MEDIUM					
Magazines	–	–	10%	11%	10%
Newspapers	–	–	13%	12%	13%
Radio	13%	14%	–	6%	24%
TV	21%	25%	11%	–	44%
Internet	11%	11%	21%	33%	–
Total*	45%	50%	55%	62%	91%
3 ...ALSO ENGAGE IN NON-MEDIA ACTIVITIES					
	10%	11%	26%	20%	27%

*Totals calculated merely to provide an index of volume of multiple media use.
Source: Simultaneous Media Usage Study, BIGresearch, USA, 2010

consumers who change their behaviour based on relevance, convenience and choice. The increase in media choice and the number of information access points has fuelled a rise in media multi-tasking. We're all media pluralists now! This is particularly true for television and the internet." The study found that magazines are read with less distraction from other media than are television and the internet.

Users of each medium were asked which of eight forms of media they might use at the same time as the primary medium:

» Among television viewers, 38% use the

internet while viewing, and 29% use a mobile phone. Adding the percentages for all eight of the media platforms brings a total of 170% of other activities while viewing TV.

- » Among internet users, 35% watch TV while surfing, and 31% use a mobile phone. Adding the percentages for all eight media gives a total of 123%.
- » Among magazine readers, 34% watch TV while reading, but relatively few readers use any of the other media simultaneously. Adding together the percentages for all eight media yields a total of 88%.

Overall, television viewers multi-task twice as much as magazine readers (170% compared with 88%). When on the internet, users multi-task 40% more than magazine readers (123% compared with 88%).

The same broad conclusion was found in the **USA** in the *Simultaneous Media Usage Study* by BIGresearch in 2010 [83] – see Figure 48. When reading magazines, 13% regularly also listen to the radio, 21% watch TV and 11% go online. This totals 45%, a smaller figure (i.e. less distraction) than for newspapers (50%), radio (55%), TV (62%) and online (91%). The media which most often simultaneously overlap are TV and the internet.

As well as simultaneous usage of more than one medium, there can also be distractions from other activities while using media. Magazine and newspaper readers engage less than users of other media in non-media activities at the same time. The bottom row in Figure 48 shows that only 10% of magazine readers regularly engage in non-media activities while reading, compared with 20% of TV viewers while viewing and 27% of internet users while surfing.

In **India** the *AIM Engagement Survey* [5] reported that 65% of magazine readers gave undivided attention to the magazine they are reading. For television only 35% of viewers gave TV their undivided attention, and for radio it was only 11% of listeners. Intermediate levels were reported for the internet (52%) and newspapers (51%).

It was predictable that magazines would have the highest proportion of users who were

focusing exclusively on that medium, with fewer competing media or other activities distracting them. It is in the nature of reading print that one has to focus on the words and apply at least a degree of attention. Reading is an active process that has to engage the brain. As the pages are turned they must be mentally scanned and a selection made of where attention will alight. In contrast, it is easier for consumers to be exposed to television and radio without fully focusing attention on them; they can be monitored as a background activity, ready to attend fully if something particularly interesting crops up.

The next question is: when two media are used simultaneously, which one attracts primary attention?

Primary attention

As James Geoghegan, President of Media Head, has said [84], “In a media-saturated environment where consumers are using more than one medium at a time, understanding which medium they pay most attention to is as important as knowing which media reach them.”

When magazines and other media are used at the same time it is magazines which usually attract the primary attention. Ball State University in the **USA** showed in their *Middletown Media Studies* [85] that 79% of the time when magazines are used simultaneously with other media, magazines received the primary focus (Figure 49). This was considerably ahead of the other print medium, newspapers with 59%, while the non-

print media lagged far behind both. For television it was the primary focus for only 15% of the time it was used in conjunction with other media.

Again, the difference between print and broadcast media is entirely understandable, because reading is an active process that requires scanning each page and making a selection of where attention will alight or whether to turn to another page.

It is similar for tablets, which also require scanning of each page and selecting what to read. In **Germany** the *Axel Springer iPad Media Impact Study* [54] showed that iPad content attracts primary attention when used in conjunction with TV. Respondents were asked “While using the iPad and watching TV at the same time, which medium gets more attention?”; 93% said the iPad receives prime attention, only 2% said TV, and 5% said both equally.

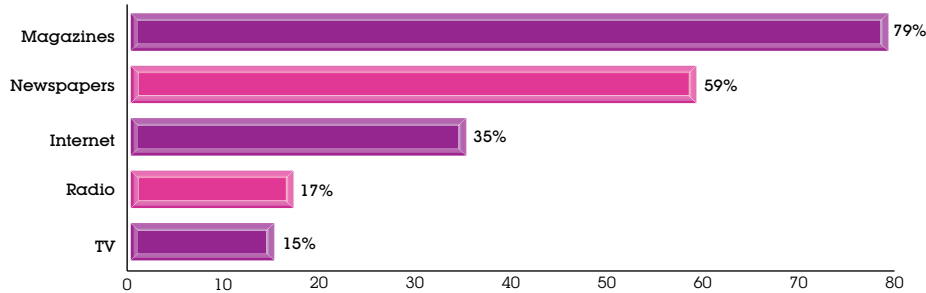
The ads: interruptive and annoying, or welcomed?

The *Media Experience Survey* in the **Netherlands** has already shown that advertising on TV and radio (and the internet) is regarded as more annoying than advertising in print media (Figure 46). This is evidently universal across the world, from Taiwan to Europe, from India to North America, and no doubt everywhere else. It is in the nature of the different media.

The intrusiveness of television and radio is a benefit to advertisers in many ways, but it frequently creates irritation among viewers.

Fig 49. OF TIME SPENT WITH MEDIUM, WHEN MEDIA MULTI-TASKING

% where it receives primary attention



Source: Middletown Media Studies, Ball State University, USA, 2005.

Moreover the commercials cannot be turned off in order to continue with the programmes; instead, in these linear media the audience must wait until the ads run their course before the programmes get under way again. It is the broadcasters who are in control, not the viewers or listeners.

With print media it is the readers who are in control. If they scan an advertisement and in a flash decide they don't wish to pay further attention to it, they can focus on something else on the page or turn to the next page. Instead of being a linear medium, print is an easy-access medium in which one can move forwards or backwards, repeatedly if desired, mentally

screening things in and screening things out. Thus the ads tend not to create irritation. Moreover the targeted nature of the advertising carried by magazines means that most of the ads are of some interest and relevance to most readers, and far from being annoying many ads are positively welcomed by readers, and acted upon.

There is research from many countries around

"MAGAZINE ADVERTISING IS TARGETED TO YOU – NOT AN INTERRUPTION LIKE TV."

Respondent in Media Matchmaker study, Australia

the world which bears this out. Here are three examples from very diverse media markets.

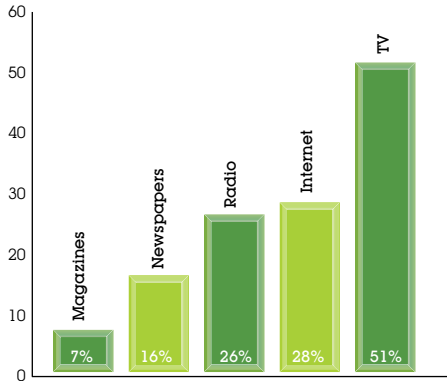
In **Taiwan** the Magazine Business Association of Taipei (MBAT) published the *Survey on Consumption Trends of Magazine Readers in Taiwan* in 2011 [86]. Among magazine readers who read magazines for more than one hour per week, 51% regarded television advertising as interference, compared with only 7% who regarded magazine advertising in that way. Figure 50 shows results for five media, and it is notable that the two print media were least regarded as interference.

In **India** the *AIM Engagement Survey* [5] found that 56% of adults feel the advertising on TV is an interruption, appearing at inconvenient times – contrasting with magazines where only 17% feel the advertising is an interruption (Figure 51). The survey also reported that 43% of adults believe that ads in TV should be eliminated – contrasting with only 16% for magazines. Put another way, 84% of readers believe ads are part of the magazine experience.

In **Germany** the survey *Medienprofile und Medienbegabungen*, Institut für Demoskopie, Allensbach [87] revealed that 73% of adults agreed that 'Advertisements in this medium really annoy me'. For magazines and newspapers the figure was only 7% (Figure 52).

And so it continues, from country to country. Magazines are unique in that the advertising they carry is an acceptable and often welcomed part of the package - ideal conditions for building and

Fig 50. PERCENT REGARDING ADS AS INTERFERENCE: TAIWAN

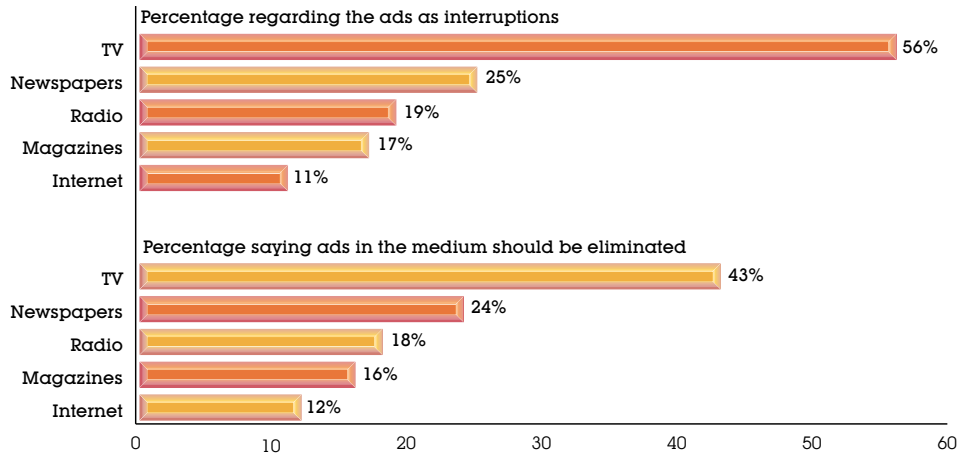


Base: Adults reading mags for at least an hour per week
 Source: Survey on Consumption Trends of Magazine Readers in Taiwan, MBAT, Taiwan, 2011

retaining trust in the ads, and making readers receptive to the advertising.

It also helps explain why consumers find that magazine advertising is more enjoyable than advertising in other media. For instance, according to GfK MRI Starch research in the USA in 2009 [88], 53% of consumers agreed that “I generally enjoy the advertising in magazines”, compared with 42% who enjoyed TV advertising,

Fig 51. ATTITUDES TO THE ADS IN MEDIA: INDIA



Base: All adults. Source: AIM Engagement Survey, India, 2011

and much lower figures of 22-8% for newspapers, internet, radio and outdoor.

Actions taken

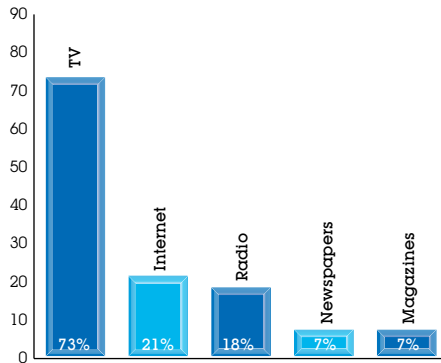
The personal nature of the exposure to magazines, the engagement, the focussed attention, the ability to inspire, the practical advice, and the generally positive attitude towards magazine advertising, all combine to

lead readers to take action as a result of seeing advertising, to a degree not seen among most other major media.

In the USA Affinity’s VISTA Print Effectiveness Ratings Service found that 53% of those who recalled seeing a specific magazine ad had responded in some way [89]. This may be compared with 68% who had responded to reading specific editorial articles. Among the

Fig 52 GERMANY: ADS IN THIS MEDIUM REALLY ANNOY ME'

% agreeing



Base: All adults. Source: Medienprofile & Medienbegabungen, Institut für Demoskopie, Allensbach, Germany, 2008

actions taken in response to ads, the most common was to consider purchasing the product or service advertised, and in addition some did make the purchase (Figure 53). Other responses showed magazine ads driving readers to seek further information, including going online, passing on recommendations by word of mouth, and other stages in moving along the consumer journey towards purchase.

Fig 53. ACTIONS TAKEN AS A RESULT OF EXPOSURE TO ADS AND EDITORIAL

EXPOSURE TO SPECIFIC MAGAZINE ADS	
Took any action (net)	53%
Considered purchasing advertised product/service	19%
Have a more favourable opinion of advertiser	12%
Gathered more info about product/service	12%
Visited advertiser's website	10%
Purchased advertised product/service	8%
Visited a store, dealer or other location	8%
Saved the ad for future reference	6%
Recommended product/service to others	5%
EXPOSURE TO SPECIFIC EDITORIAL ARTICLES	
Took any action (net)	68%
Saved article for future reference	29%
Passed article along to someone	24%
Gathered more info about the topic	15%
Visited a related website	12%

Base: Respondents recalling specific ads or articles
Source: VISTA Print Effectiveness Rating Service, Affinity Research, USA, 2010

Driving online activity, and word of mouth communication, are examined further in the next two sections.

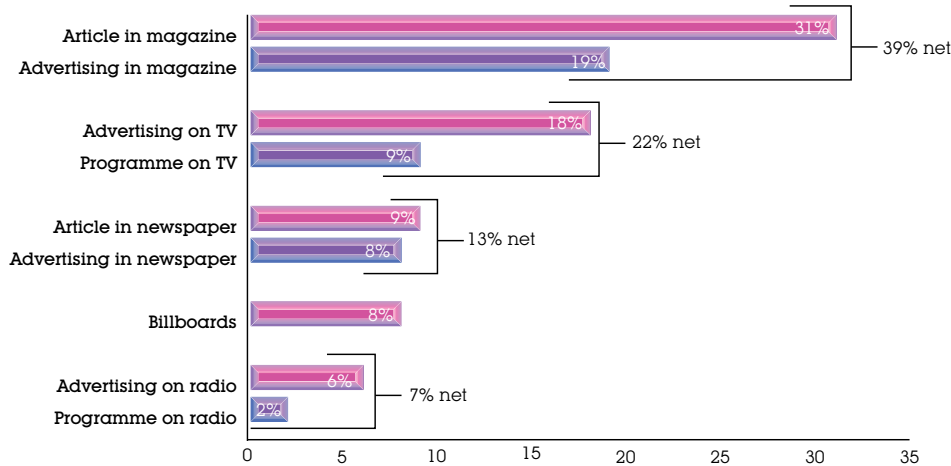
Magazines as drivers of online activity

Since the internet plays a crucial role in providing information for many consumer purchasing decisions, advertisements have more added value the more they can activate consumers to visit the web as a response to seeing advertising.

In the **Czech Republic** the *Magazine Advertising Study* by Czech Publishers Association/Millward Brown [10] revealed that magazines were the principal generators of internet shopping, among five media: magazines, TV, newspapers, radio and outdoor (Figure 54). Among adults who had shopped online, 39% had been inspired by something in magazines, compared with 22% by television and 13% by newspapers. In magazines, articles were stronger prompts than advertising, but magazine advertising (19%) was easily comparable with TV advertising (18%), and well ahead of advertising in the other media (8% or lower).

In the **UK** the survey *Magazines in the Driving Seat: Offline Drivers of Research and Purchase*, published by the PPA [90], similarly demonstrated magazines' ability to generate clicks, at a level broadly comparable with TV. Users of each medium were asked which of a list of four media have triggered them to go online when looking for information on products they were considering purchasing. 45% of magazine readers

Fig 54. SOURCES INSPIRING INTERNET SHOPPING



Base: Adults who have shopped online. Source: Magazine Advertising Study, Czech Publishers Association/Millward Brown, Czech Republic, 2010

said they had been triggered by magazine ads. For television viewers the percentage was 50% triggered by TV ads, and these two media were well ahead of newspaper advertising (31%) and radio advertising (17%).

In addition the study found that 58% of online adults said they had made a purchase online which had been influenced by advertising messages seen offline. Among those who had

made an online purchase, 32% of magazine readers said magazine advertising had helped them with ideas or information on products they had bought online. Similarly 32% of TV viewers had been influenced by TV ads concerning purchases made online. Scores for newspapers (21%) and radio (10%) were considerably lower.

Thus magazine advertising matches television advertising in influencing online purchases – but

at a lower cost (in the UK market at least, and in many other markets), making magazines more cost-effective.

Magazines as drivers of word of mouth

Magazines multiply their effects by generating responses in other forms of media. As well as driving readers to go online in search of information, magazines also generate word of mouth communication, or buzz.

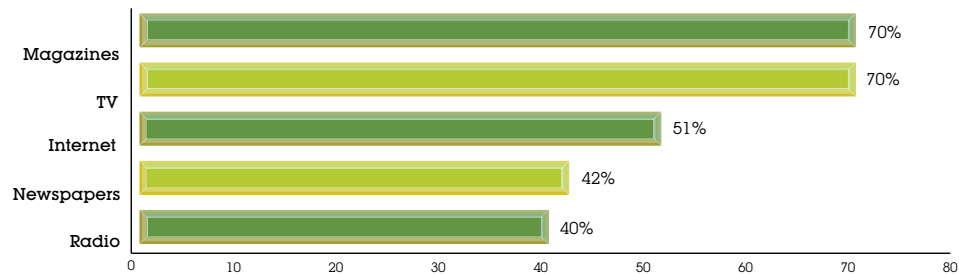
The UK's PPA investigated this in a study called *Targeting Influentials* [91]. The research first identified the most influential consumers by asking respondents a series of questions assessing whether they tend to talk to lots of people about the product category ('Connectors'), whether they know a lot about the category ('Mavens'), and whether they thought their opinion was likely to convince others ('Sellers'). The Influentials were defined as those who qualified for all three groups. Influentials were asked "How likely are each of the following types of advertising to influence whether you would talk to others about (product category)?"

The answers varied according to the product category, but in all categories magazine advertising was always a leading source. Figure 55 gives an illustration from the clothes market. Magazines and television were equally influential, and more influential than the other media.

What lies behind this strong showing for magazines is that consumers form 'communities of interest', and magazine publishers create

Fig 55. MEDIA INFLUENCING THE INFLUENCERS

"Which of the following types of advertising are likely to influence whether you would talk to others about... clothes?"



Base: Users of each medium . Source: Targeting Influentials, PPA, UK, 2008

content that serves those communities. Consequently those consumers who are most enthusiastic about their topic form the core readership of magazines servicing the community. These enthusiasts are normally the most knowledgeable and vocal members of the community – that is, the key influencers within their social networks. Thus magazines, sitting at the heart of communities of interest, are a vital medium for establishing a regular dialogue with the key influencers within a market.

The same was found in **Russia**, among many other countries. The *TrendFormers* survey, published in 2010 by Hachette Filipacchi Shkulev

[92], identified three groups of people in any one product category: TrendFormers, Mainstreamers and Followers. TrendFormers were those who are very knowledgeable about the product category, are active in talking about it, and are able to convince other people. They are the persuasive opinion leaders, the influencers. They rely particularly on magazines and the internet for keeping up to date with their information. Magazines are especially valued for providing TrendFormers with an ‘emotional’ background to the topic area, and TrendFormers have much more intense contacts with magazines than the Mainstreamers and Followers.

Distinctive positioning for magazines as communicators, influencers and motivators

The broad picture to emerge from the evidence in this chapter is that the closeness of readers to their chosen magazine brands, and all that flows from that fact, means that there is a distinctive and valuable role for magazine media as part of a multi-media advertising campaign.

In the comparisons with other media, magazines are seen to have particular strengths which set them apart as unique in the way they communicate with, influence and motivate their consumers. ●

7

Campaign effectiveness: Magazine media on their own

There are many case studies of successful magazine-only campaigns. Uplifts in sales, and in intermediate key performance indicators, can be 10% and more, with high returns on investment proving handsome profits on the advertising spend.

Previous chapters have described how consumers use magazine media, how the ads are used, what it is about magazines which is unique, and why we can be confident that magazines are a cost-effective advertising medium. The remaining chapters turn to the proof of it all, in terms of assessing magazines' performance in campaigns.

This chapter looks at magazine-only campaigns. The next chapter studies magazines' role and effectiveness in mixed-media campaigns. The final chapter discusses the particular problems (for magazines) and opportunities

offered by the increasingly important econometric modelling of advertising return on investment (ROI).

There are many many case studies of successful advertising campaigns which have used magazines on their own and proved that they have generated significant additional sales, and repaid the advertising investment several times over. A small selection may be found in the range of sources listed in the References appendix as reference [93].

This chapter summarises major examples from two countries.

Meredith analysis: 10% uplift in sales

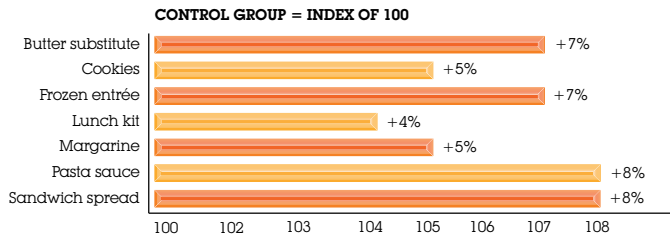
An average uplift in sales of 10% was reported in the 2011 conference paper *Magazine ROI: Quantifying the Impact of Magazine Investment on Brand Sales*, by Britta Ware of Meredith Corporation and Jeff Bickel of Nielsen Cataline Solutions in the USA [94].

This study of 14 brands using only magazine advertising found that all 14 had achieved sales uplifts as a result of the advertising.

Magazine campaigns for the 14 brands were run in Meredith magazines. Nielsen's HomeScan consumer panel was used to examine week by

Fig 56. Sales uplift among households exposed to magazine advertising (food)

Sales uplift per average household, compared with control group



Source: Magazine ROI, Meredith Corporation, USA, 2011

week sales of the 14 products during the period July 2009 to December 2010. Households were classified into those which had been exposed to the magazine advertising and those which had not (the control group).

With all 14 brands, the average household exposed to the magazine advertising spent significantly more on the advertised brands than the control group. The average sales uplift of 10% represented a range varying from 3% uplift to 36% uplift.

Figure 56 displays the uplift for each of the seven food brands, indexed on the control group

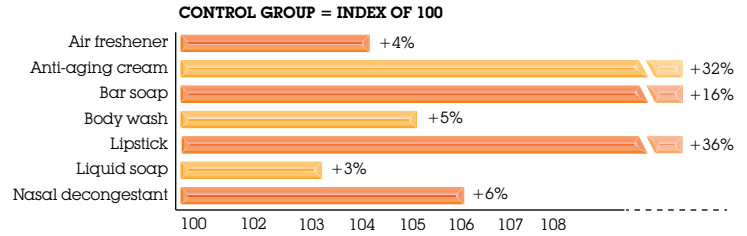
as 100. There was some notable consistency in the figures: all the sales uplifts were in the range 4%-8%.

Figure 57 displays the sales uplift for each of the seven non-food brands. For this disparate group of products the sales uplift varied by much more than for the food products, ranging from 3% for a liquid soap brand to 36% uplift for a lipstick and 32% for an anti-aging cream.

Nielsen's analysis showed that for ten of the brands the increase in sales was achieved principally through increasing the spend of existing purchasing households. For the other

Fig 57. Sales uplift among households exposed to magazine advertising (non-food)

Sales uplift per average household, compared with control group



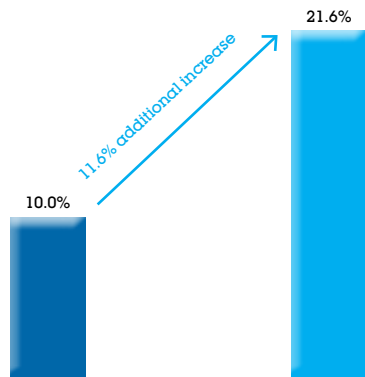
Source: Magazine ROI, Meredith Corporation, USA, 2011

four brands the uplift came mainly through increasing the number of buying households.

For each brand Nielsen calculated the return on investment (ROI) for the magazine advertising. ROI was defined as the incremental (gross) sales generated per advertising dollar. The average ROI across the 14 brands was a very healthy \$6.61. That is, every dollar spent on advertising in magazines generated additional sales of 6.61 dollars. For the seven food products the average ROI was as high as \$13.78.

Fig 58. AVERAGE SALES UPLIFT FROM MAGAZINE CAMPAIGNS

% increase in sales value during campaign



Source: *Sales Uncovered*, PPA, UK, 2005

PPA analysis shows 11.6% uplift in sales

The average sales uplift of 10% in the Meredith analysis had a parallel in an earlier analysis in the UK, where an average sales uplift of 11.6% was found. The two projects used a broadly similar method - analysing consumer purchasing panel data, classifying panel members into those exposed to magazine advertising and those not exposed (the control group); then comparing purchasing levels of the two groups. That the

results were so similar – 10% sales uplift in the USA and 11.6% in the UK – shows that the studies mutually reinforce one another.

The UK project was *Sales Uncovered*, published by the Professional Publishers Association (PPA) in 2005 [95]. The study was an analysis of TNS Superpanel, a leading consumer purchasing panel, among whose members media exposure data had also been collected. The analysis was based on 20 fast-moving consumer goods (fmcg) brands for which magazines accounted for at least 10% of the brand's total advertising expenditure.

Taking each of the 20 fmcg brands' campaigns in turn, Superpanel main shoppers were ranked according to the weight of their exposure to the magazine campaign. The heaviest-exposed 40% of main shoppers were defined as the 'exposed' group; in general, they accounted for about 90% of total magazine exposures. The least-exposed 40% of main shoppers in the ranking were defined as the 'non-exposed' control group; they only accounted for around 2% of total magazine exposures.

Differences between the two groups in terms of sales uplift (in the campaign period, compared with the pre-campaign period) were associated with exposure to magazine advertising.

11.6% uplift in sales value

Aggregating the results of all 20 brands, there was an average sales increase of 10.0% among those not exposed to the magazine campaign

– the increase being due to other activities than magazine advertising. However among those exposed to the magazine campaign, the sales increase was 21.6% (Figure 58). Thus the magazine advertising was associated with an extra 11.6% increase in sales (in terms of value).

In terms of sales *volume* rather than *value*, the uplift from magazine advertising was 18.1%.

Similarly, there were increases in *market share* when magazine advertising was used. For market share in terms of sales value, magazine advertising was linked to an uplift of 6.7 percentage points. For sales volume market share, the uplift was 8.6 percentage points.

Winning new customers: brand penetration and weight of purchase

Magazine advertising can win new customers for a brand, and at the same time increase the average weekly weight of purchase. Across the 20 brands, brand penetration of the market rose by 7.0% in the campaign period among people not exposed to magazine advertising, but rose by 15.5% among those who had seen the magazine ads – an uplift of 8.5 percentage points.

Meanwhile there were increases of 2.1% and 3.7% in average weight of purchase, among the non-exposed and exposed respectively – a magazine uplift of 1.6%. Thus the sales uplift for magazines was achieved mainly by bringing new buyers to the advertised brands (i.e. increase in penetration), and to a lesser extent by increasing the average weight of purchase.

ROI: healthy return on investment

Research agency TNS was able to make estimates of the return on investment for each campaign, across 12 months from the start of the campaign, which may be regarded as the medium-term ROI. It takes into account the repeat purchasing of the brand from those buyers who were persuaded by the magazine advertising to buy the product. This calculation resulted in a figure, across the 20 brands, of £2.77. That is, for every £1 spent on magazine advertising, there were additional sales of £2.77. To put it into context, this can be set beside the figure of £2.33 for television advertising, also based on Superpanel data and calculated by TNS [96].

TNS's methods of calculation for the two media were based on the same principles, but as the calculations were not precisely the same, and different sets of brands were used, one should be circumspect in reading much into the magazine figure being rather higher than that of television. However it is reasonable to conclude that the ROI for magazine advertising was at least comparable to that of television advertising. ●

“BY MEASURING BRAIN ACTIVITY, IT HAS BEEN CLEARLY SHOWN THAT IT TAKES CONSIDERABLY MORE BRAIN INVOLVEMENT TO READ A BOOK (OR MAGAZINE) THAN TO WATCH TELEVISION. REASON BEING THAT WHEN READING WE'RE CREATING IMAGES IN OUR MIND'S EYE, WHEREAS TV WATCHING IS SIMPLY THE CONSUMPTION OF PRE-PACKAGED IMAGES. AND BECAUSE WE'RE SO PASSIVE IN THE FACE OF TELEVISION – BECAUSE WE'RE NOT PROCESSING THE INFORMATION BY INTERACTING WITH IT, DISCUSSING IT OR GENERATING RESPONSES – WE LEARN VERY LITTLE.”

The Rough Guide to Happiness, by Dr Nick Bayliss

8

Campaign effectiveness: Magazines in multi-media campaigns

Different media work in different but complementary ways, and multi-media campaigns take advantage of the synergy. When combined with TV and online, magazine advertising creates significant incremental uplifts at all stages of the consumer journey, from awareness to purchase intent and sales. Diminishing returns from TV advertising can show it would pay to re-allocate some TV money to magazines.

Synergy between media

One of the reasons why television, internet and magazines work well together is the synergy that occurs between them. They work in different but complementary ways; each one enhances the performance of the other. It is over 20 years since publication of the two classic UK pieces of research which investigated this idea in 1987 and 1990 by studying magazines and television: *Multiplying The Media Effect* [97] and *The Media Multiplier* [98]. Their conclusions remain just as true in 2012.

The main conclusions of *Multiplying The Media Effect* were that:

- » One medium can communicate ideas additional to those derived from seeing another medium
- » One medium can affect and enrich what is understood from a subsequent exposure to another medium
- » Greater strength can be added to a mixed-media campaign by encouraging this process through creative links between the media

The page and the screen nourish each other.

The Media Multiplier showed that advertising in print in addition to TV, rather than advertising only on TV, brought some important communication benefits:

- » Seeing a print ad can lead people to perceive the TV commercial in new ways
- » Print can also convey new information that is not in the TV commercial
- » The result of adding print to a TV campaign is a richer, more complete communication

PANEL 9

EXAMPLES OF THE MULTIPLIER EFFECT

BIRDS EYE COUNTRY CLUB RANGE OF FROZEN VEGETABLES

First, the magazine advertisement (when seen before TV) provoked a greater range of thoughts than the TV commercial (when TV seen first). In particular there was more emphasis on the vegetables themselves, especially how attractive they looked, and the variety (although the TV commercial showed just as great a variety).

Second, and very significantly, informants who were shown the sequence TV-magazine-TV noticed individual vegetables in the television commercial much more the second time they saw the commercial. The magazine ad had evidently made them more aware of the range of vegetables and this affected the way they experienced the subsequent television commercial. Thus the magazine ad on its own not only communicated additional things compared with the commercial, but also enhanced the response to the commercial itself.

MILK

Something similar happened with the advertising for milk. Not only did the magazine advertisement communicate more thoughts about the different types of milk available from the milkman - skimmed, semi-skimmed and standard - but also informants became far more aware of the skimmed and semi-skimmed milk that appeared in the television commercial when they saw it after the magazine advertisement, compared with when they saw TV before the magazine ad. A different stimulus in a different medium had affected the way the subsequent TV advertising was understood.

From The Media Multiplier, quoted in How Magazine Advertising Works, by Guy Consterdine for PPA, UK, 2005

In addition, adding magazines to TV expands the reach of the campaign.

Numerous subsequent studies have demonstrated the enduring truth of these conclusions. A television campaign working in tandem with a print campaign outperforms a TV-only strategy.

To quote just one recent example from 2012, the *AdSense* study from IPC Media in the UK [9] found that 61% of their women respondents agreed that they were more likely to remember a brand after seeing advertising in magazines as well as TV, compared with seeing advertising only on TV. Similarly 56% agreed that they were more likely to remember the brand when magazines were added to online advertising.

They also understand the message better too. 45% agreed that "I understand what the adverts are telling me more after seeing them both" (with magazines added to online) rather than seeing online alone. When adding magazines to TV advertising, 47% agreed that "I understand what the adverts are telling me more after seeing them both" compared with seeing just TV. One respondent remarked "Magazines go into more detail so they are able to explain properly and clearly". Another commented "With a magazine ad I can re-read if necessary".

In the present digital age, magazine media still have a valuable role to play in multi-media advertising campaigns.

This chapter is divided into two main sections. First, evidence about magazine media's capabilities in nudging consumers along their journey towards purchase. Second, sales: evidence that magazine media generate additional sales when used in conjunction with other media, especially television.

MAGAZINES' EFFECT ON THE CONSUMER JOURNEY

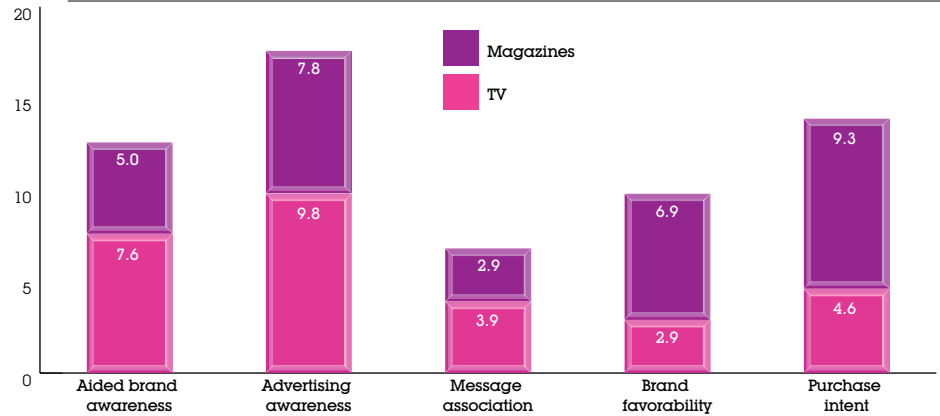
The consumer journey

There are many possible descriptions of the journey along which a consumer travels in moving from little or no awareness of a product to purchasing it and developing an emotional bonding with it. One sequence of four steps might be defined as: advertising/brand awareness; brand familiarity; brand imagery; purchase consideration/intent. Here is an alternative description in five stages:

- » Awareness: the consumer has a first experience of a product – on a supermarket shelf, in an advertisement, etc
- » Filtering: can the brand meet your needs, and is its price satisfactory?
- » Comparisons with other brands: when compared with what you expect from brands in the category, does the new brand seem competitive?
- » Exclusives: is there a distinct advantage over rivals which leads the consumer to buy it more frequently?
- » Bonding: a broad set of positive factors, including post-purchase experience, may lead

Fig 59. INCREMENTAL EFFECT OF MAGAZINES ADDED TO TV

Average percentage point increase over control (unexposed) baseline



Aggregation of 32 campaigns. Percentages are % among exposed group minus % among control (unexposed) group
Source: CrossMedia Research, Dynamic Logic/Millward Brown, USA, 2007.

to regular purchases and an emotional bonding.

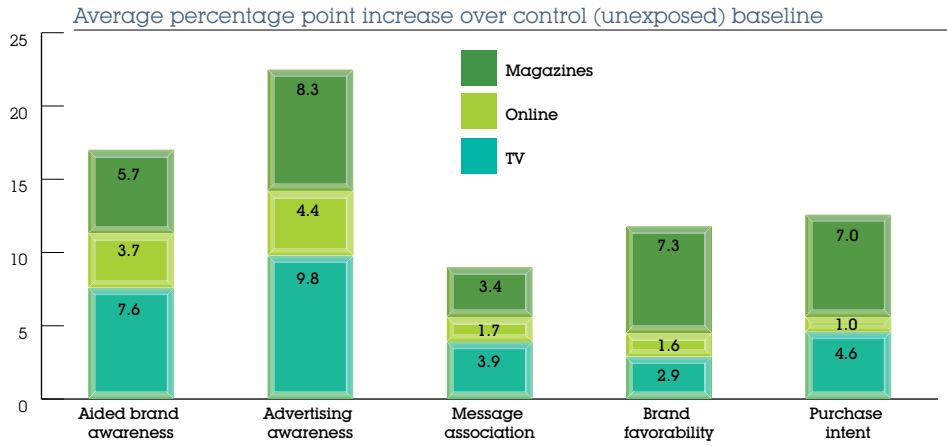
Sometimes a sequence of stages like this is called 'the purchase funnel', because generally the closer a criterion is to the decision to purchase the product, the fewer the number of consumers reach that step.

Advertising in magazine media can be shown to be capable of playing a role at all these stages, helping consumers to move along the journey towards purchase and bonding.

Dynamic Logic/ Millward Brown's CrossMedia research

Proof of magazines' effectiveness was seen in the USA from the research institutes Dynamic Logic and Millward Brown, whose CrossMedia Research has measured a large number of advertising campaigns which used multiple media. An aggregate analysis of 32 campaigns which placed significant investment in magazines has shown how magazines and other media work together at building or shifting brand attitudes. *Measuring*

Fig 60. INCREMENTAL EFFECT OF MAGAZINES ADDED TO TV AND ONLINE



Aggregation of 32 campaigns. Percentages are % among exposed group minus % among control (unexposed) group
 Source: CrossMedia Research, Dynamic Logic/Millward Brown, USA, 2007.

“MILLWARD BROWN RESEARCH CONFIRMS THAT DUE TO HIGHER INVOLVEMENT COMPARED TO THE MORE PASSIVE VIEWING EXPERIENCE OF TV ADVERTISING, MAGAZINE MESSAGES ARE MORE LIKELY TO BE RETAINED.”

William Havlena (Dynamic Logic/Millward Brown) and others, 2007 (99)

Magazine Advertising Effectiveness & Synergies, a conference paper by William Havlena and others [99] at the 2007 Worldwide Readership Research Symposium, reported on the results.

For each campaign five steps in the purchase funnel were measured, as shown in Figure 59. At each step, a modelling process assessed the effect of each medium in creating the results observed.

First, campaigns using TV and magazines were examined in aggregate. The results were presented in incremental form,

where the effect of TV is shown first, then the additional effect of magazines.

Figure 59 shows that magazines made a large contribution at each of the five stages. They boosted aided awareness by 5.0 percentage points on top of the 7.6 percentage points credited to TV. And similarly for the other four stages. Most impressive of all, however, was magazines’ effect on the single most vital criterion, purchase intent. TV had increased consumers’ intention to buy the products by an average of 4.6 percentage points, but magazines increased purchase intent by a further 9.3 percentage points. That is, magazines’ effect in persuading people onto that last step of deciding to buy was twice the effect of television.

A broadly similar conclusion was found when online advertising was included. The analysis shown in Figure 60 was again in incremental form, first showing the effect of TV, then the additional effect of adding online, and finally the additional effect of adding magazines on top of TV and online.

Again magazines made a substantial contribution at all stages. For example, TV increased aided brand awareness by 7.6 percentage points (compared with the control group); the internet added a further 3.7 percentage points; and then magazines added a further 5.7 percentage points. Once again magazines’ contribution was proportionately greatest for the two criteria closest to the buying decision: brand favourability and purchase intent. On brand favourability, magazines

accounted for 7.3 out of a total of 11.8 percentage points increase for the campaigns. On purchase intent magazines accounted for 7.0 out of 12.6 percentage points increase. For both criteria, magazines achieved more effect than TV and online combined.

The impressive scale of magazines' contribution can be summarised by adding the percentages across all five steps of this purchase funnel, for each medium. Figure 61 presents the outcome. Using the data from Figure 59, the pie chart on the left reveals that magazines contributed 53% of the effects achieved by advertising, leaving TV with 47%. Thus magazines more than equalled the effects generated by TV, but at much lower cost. Expressed another way, magazine advertising delivered a much higher return on investment (ROI) than television advertising.

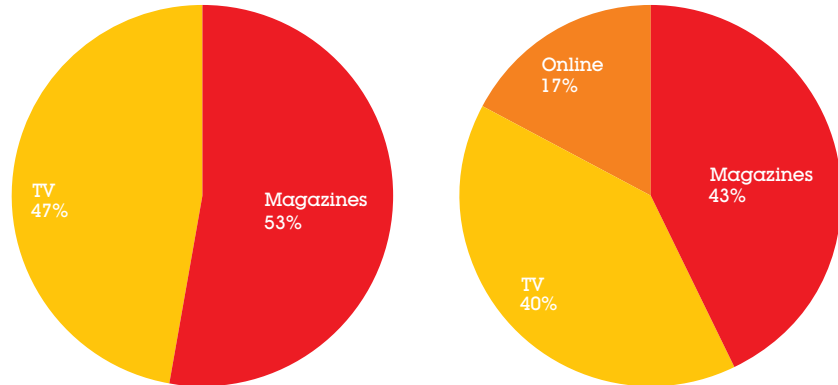
It was the same story when online advertising was included. The right hand pie chart uses the data from Figure 60, and reveals that magazines produced 43% of the campaigns' total effect, TV 40%, and online 17%. Magazines more than equalled TV in performance, but again at lower cost and therefore with higher ROI.

Marketing Evolution's purchase funnel

Another research institute which reached similar conclusions was Marketing Evolution, which tracks consumer attitudes and behaviour shifts in the USA. MPA The Association of Magazine Media commissioned an analysis of Marketing Evolution's database to examine the roles of television,

Fig 61.

Magazines' share of total incremental effects across whole purchase funnel



Source: Data in Figures 59 and 60

magazines and the internet [100]. 20 brands were identified with the relevant media combinations, and their results across the period 2004-2006 were aggregated. Comparisons were made between pre- and post-campaign scores on brand awareness, brand familiarity, and purchase intent. The performance of television on its own (post-versus pre-campaign results) was indexed as 100.

Figure 62 shows that for brand awareness, performance was considerably increased when online, magazines, or both, were used in conjunction with television, compared with

TV on its own. Adding magazine advertising to TV increased brand awareness by half as much again, and it achieved more than adding online advertising. The best result of all was obtained when all three media were employed.

It was a similar story for brand familiarity (Figure 63). Magazines were the more effective medium to add to television, by some distance, but best of all was using the three media.

Purchase intention is regarded by many as the most relevant of these measures, since it is closest to the act of purchasing and

Figs 62–64. ADDING MAGAZINES AND / OR ONLINE TO TV ADVERTISING

Fig 62. Brand awareness

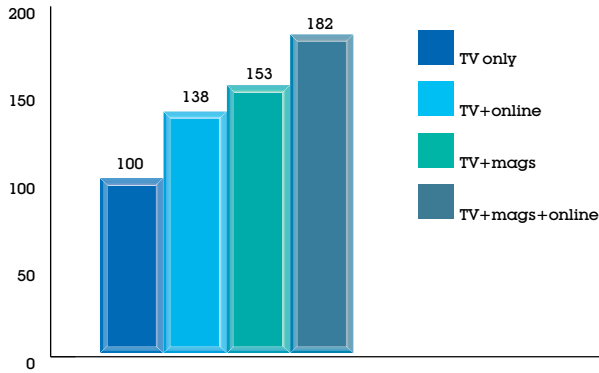


Fig 63. Brand familiarity

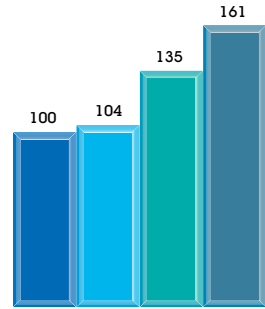
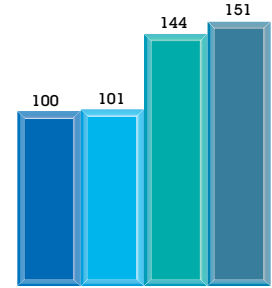


Fig 64. Purchase intent



Post-campaign percentages, minus pre-campaign percentages, for each media combination. Uplifts indexed on TV-only as 100. Aggregate of 20 campaigns. For certain measures &/or media combinations, fewer campaigns qualified with sufficient sample sizes. Source: Marketing Evolution, USA, 2006

reflects a decision already made in principle. Here again magazines made a significant contribution (Figure 64). TV and magazines in combination considerably outperformed TV on its own and TV plus online. Nevertheless there were further gains to be obtained by adding online to the TV+magazines mix.

Marketing Evolution also measured other stages of the purchase funnel, such as brand imagery, and these too found similar results.

For all of the campaigns examined, television took the lion's share of the budget. The powerful

additional effects of magazines showed that magazine advertising is highly cost-efficient compared with television advertising – at any rate, at the budget splits being used. The implication is that it would often pay to re-allocate a portion of the TV budget into the more cost-effective magazine medium.

Indeed, Marketing Evolution carried out optimisation modelling for 16 of the campaigns, and recommended that in 11 of the campaigns (two-thirds) magazines' share of spending should increase by as much as 30 percentage points.

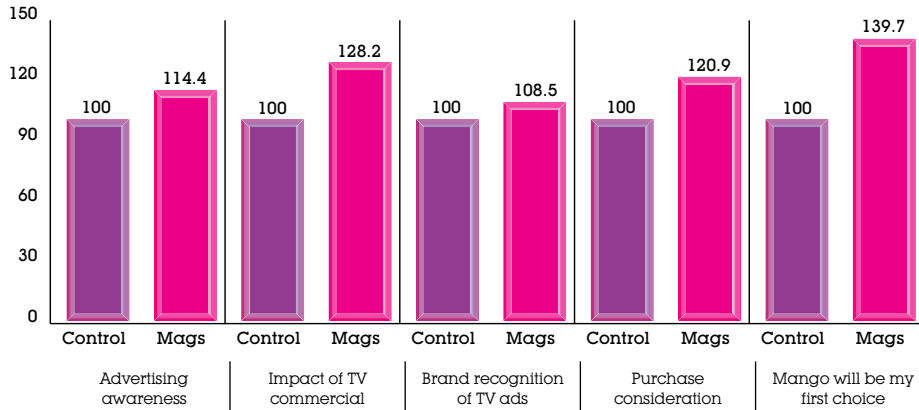
Magazines initiate the media multiplier – and make TV work harder

The *Atenea* system in Spain has proved the consistent and powerful contribution made by magazines in advertising campaigns in which television is the principal medium. *Atenea* is hosted by the Spanish magazines association ARI (Asociación de Revistas de Información) and sponsored by three publishers: GPS, Hearst and RBA.

Atenea involves a campaign tracking study combined with analysis tools which quantify what magazines have achieved [101]. *Atenea*

Fig 65. MAGAZINE ADVERTISING LIFTS KEY PERFORMANCE INDICATORS

(1) MANGO FASHION BRAND



Base: Women who have seen TV advertising. 'Control': not seen magazine advertising. 'Mags': have seen magazine advertising. Source: Atenea, 2nd wave 2011. ARI, Spain

has measured more than 200 TV+magazines campaigns. *Atenea* interviews consumers who have seen the TV advertising, and divides them into those who have also seen the magazine advertising and those who have not (the control group). Care is taken that both groups have received the same level of exposure to the TV campaign and have similar socio-demographic and other characteristics.

A typical example is the advertising for the

Mango women's fashion brand, studied in 2011. Figure 65 presents the Mango results for five key performance indicators (KPIs). Indexing the control group of women (those not seeing magazine ads) as 100, those women exposed to magazines had 14.4% greater awareness of the advertising campaign.

Tellingly, the magazine advertising made the television advertising work harder (second and third blocks of bars in Figure 65). Respondents

were shown frames from the TV commercial, without the brand being revealed. In a measure of the impact of the TV commercial, consumers who had also seen the magazine ad produced scores that were 28.2% higher than those who had not seen magazine ads. Moreover among consumers who recalled having seen the TV commercial, those who'd seen the magazine ads were 8.5% better than the control group at correctly stating the brand in the commercial. The magazine ads had helped many consumers to take out more from the TV commercials. This is a classic example of the media multiplier effect working at a granular level. Each medium helps the other media to be more effective.

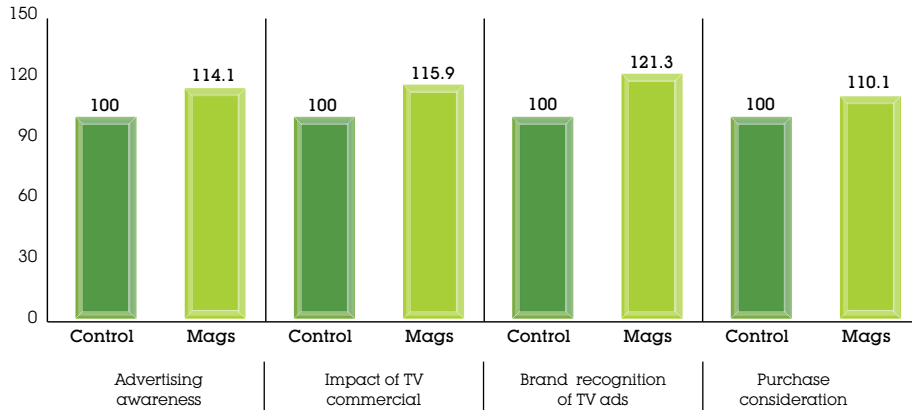
The benefit of magazines was particularly strong as the measures came closer to the point of purchase. Purchase consideration was 20.9% higher among the women who had seen the magazine ads, compared with the control group. The index was higher still among those who declared that Mango will be their first choice: +39.7%.

Moving from individual campaigns, *Atenea* has aggregated results across all campaigns studied during 2010 and 2011. Figure 66 presents the outcome. As before, the base is those who have seen the TV advertising, and the comparisons are between those consumers who have also seen the magazine advertising, and those who have not (the control group).

Compared with the control group, for the average campaign those seeing magazine advertising were 14.1% more aware of the

Fig 66. **MAGAZINE ADVERTISING LIFTS KEY PERFORMANCE INDICATORS**

(2) AGGREGATED RESULTS FROM CAMPAIGNS MEASURED IN 2010-2011



Base: Women who have seen TV advertising. 'Control': not seen magazine advertising. 'Mags': have seen magazine advertising. Source: Atenea, 2010-2011, ARI, Spain

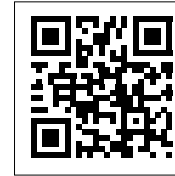
advertising; scored 15.9% higher on a measure of impact of the TV commercial; were 21.3% more aware of the name of the brand; and purchase consideration was 10.1% higher.

Other analyses of the *Atenea* database have shown that, in campaigns where TV advertising is the main medium, magazine advertising adds substantial value:

- » among all major target audiences

- » in all product categories
- » for launches and small brands
- » for large brands

For launches and small brands magazines were particularly valuable for increasing awareness of the brand. For large brands where awareness is already very high, magazines were especially helpful in improving the richness and quality of the communication delivered by the campaign.



Atenea video

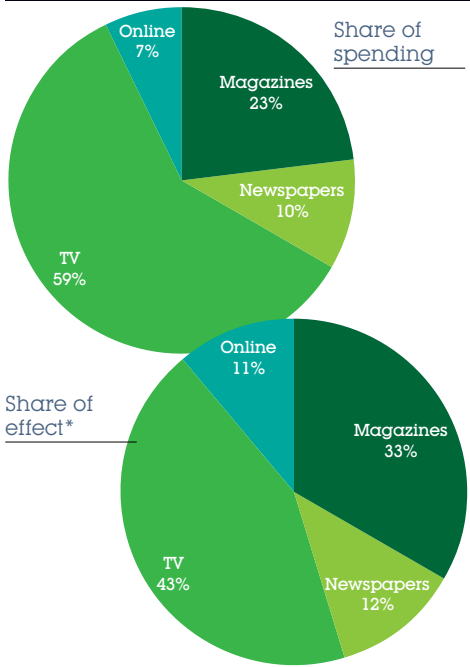
The Media Observer: evidence of under-spending on magazines

In the **Netherlands** a campaign evaluation and optimisation service called *The Media Observer* [102], operated by research agency TNS NIPO in collaboration with the Dutch Publishers Association (NUV), reached these conclusions after examining many campaigns:

- » Multi-media campaigns using TV and magazines perform better than TV-only campaigns, in terms of ratings, brand recognition and buying intentions
- » Within mixed-media campaigns, typically there is considerable over-spending on television and under-spending on magazines
- » The optimal budget split between the two media (taking account of diminishing returns) is around 60% on TV, 40% in magazines.
- » When online is brought into the mix the optimal ratio is around 60% on TV, 25% in magazines, 15% online

The third conclusion above can be expressed as saying that magazines merit an investment equivalent to two-thirds of the investment in TV. Instructively, this is precisely the same conclusion

Fig 67. SHARE OF SPENDING VERSUS SHARE OF EFFECT



*Aggregating data on 6 KPIs: unaided & aided ad recall, brand awareness/appeal/usage, purchase intention. Base: 906 brand models, each spending > 1 million euros in consumer magazines and > 2 million euros in total. Source: AIM Brand Tracking 2010, Germany

as reached in the econometric modelling for Henkel conducted by Ohal in Sweden, where that scenario was the most advantageous of those examined (described later in this chapter). Moreover this is aligned with the comment based on the UK's *Sales Uncovered* that 22% may frequently be too low a share of budget for magazines – as a later section reveals.

Share of spending versus share of effect

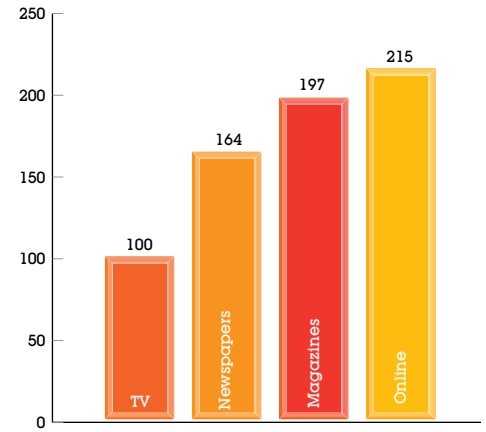
Another body of work with aggregated results on real advertising campaigns is the *Ad Impact Monitor (AIM) Brand Tracking* project in Germany [13]. Figure 67 presents two pie charts from 906 brand models. These show the share of advertising expenditure, and the share of overall 'effect', for TV, magazines, newspapers and online. Overall 'effect' is calculated by aggregating the results for six KPIs (ranging from unaided ad recall to purchase intent), across the 906 cases.

On average, TV took 59% of the budget but only contributed 43% of the effect. Magazines, on the other hand, took 23% of the budget but contributed 33% of the effect. Newspapers and the internet, too, contributed more in effect than they cost in euros.

Another way of looking at this situation is to calculate the ROI of each medium, based on dividing the share of effect by the share of spending. Figure 68 presents the outcome, indexed with TV's ROI as 100.

Based on the very large sample of 906 brand analyses, newspapers' average ROI was

Fig 68. INDEX OF ROI: 906 BRAND MODELS (GERMANY)



Based on data in Figure 67: share of effect divided by share of spending, indexed on TV = 100. Source: AIM Brand Tracking 2010, Germany

64% higher than that of TV, while magazines' was virtually double, at 97% higher. Online, accounting for only 7% of the budgets, achieved an average ROI that was more than twice TV's.

It is reasonable to conclude that the great majority of the brands in this mega-analysis could have increased the effectiveness of their campaigns by re-distributing a portion of their TV budgets into other media.

MAGAZINE MEDIA'S IMPACT ON SALES IN MULTI-MEDIA CAMPAIGNS

Sales Uncovered

The PPA's *Sales Uncovered* analysis of TNS Superpanel consumer purchasing panel data in the UK [95] was described in the previous chapter. Among the 20 brands examined, seven were TV+magazines campaigns whose impact was assessed by medium. The average budget split across these brands was 70% in television and 22% in magazines, with 8% in other media. For each of these seven campaigns, Superpanel main shoppers were ranked according to their weight of exposure to the magazine advertising and, separately, to the TV advertising.

Aggregating across the seven campaigns, main shoppers who had seen none or very little of either the television or magazine advertising showed only a small increase in sales during the campaign period: 3.9% (Figure 69). By contrast, those exposed to the magazine advertising but who were only lightly or not exposed to TV, showed a dramatically higher increase in sales. The same was true of those heavily exposed to TV but not exposed to magazines. For the two groups, the sales increase was 26-29%.

It is notable, then, that magazines accounted

for a much lower proportion of advertising expenditure than television: 22% of the budgets, compared with 70% for television. While magazine advertising achieved something approaching the effect of television advertising, it did so at less than a third of the cost.

This does not mean that magazines are two or three times more cost-effective than television in all circumstances. What it indicates is that, pound for pound, magazines were much more cost-effective *at the relative levels of expenditure in these seven campaigns*. The reason may well be that television has been allocated too much of the budget and magazines too little.

We know that diminishing marginal returns sets in for all media, and the expenditure on television in these cases appears to have reached the point of severe diminishing returns. If, however, a more equally balanced amount had been allocated to magazines and television one could expect the two media to become much closer in cost-efficiency. It points to the conclusion that 22% may frequently be too low a share of budget for magazines.

Of course, such calculations also depend on the relative costs of advertising in magazines and television. In countries where television is cheaper than magazines, and not the other way round, the arguments based on ROI may be more nuanced.

Magazines out-perform TV in Henkel Schwarzkopf case study

In Sweden in 2011, on behalf of the publishers

association Sveriges Tidskrifter, media agency MEC and independent media consultancy Ohal, a specialist in econometric modelling, examined the effects on sales of advertising in magazines and other media. MEC's client Henkel and its Schwarzkopf brand's haircare products were the subject of the study [103].

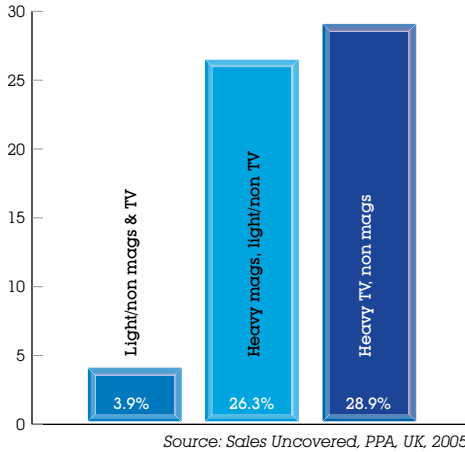
Ohal's modelling method is discussed in the next chapter. Its key output is estimates of return on investment (ROI) – defined as sales revenue attributed to each medium, divided by the cost of advertising in the medium. It shows how much each Swedish krona invested in a medium produces in terms of additional sales. An ROI greater than 1.0 means that the advertiser gets back more revenue than was invested.

For Schwarzkopf's Gliss haircare products, magazines proved to be the most cost-effective platform in Gliss' media mix. They accounted for 13% of the media budget but generated 18% of the additional sales from media, and achieved an ROI of 1.7 (Figure 70). That is, the average krona spent in magazines produced 1.7 krona of additional sales revenue, compared with TV whose average krona investment produced only 1.2 krona of additional sales revenue. Both media were considerably more effective than online and web TV advertising.

Schwarzkopf has several hair colouration products, of which two brands, Essential Color and Blonde, used the combination of TV, magazines and online advertising. The profiles of media budget and sales effects, and the ROI

Fig 69. SALES INCREASES, BY WEIGHT OF EXPOSURE TO TV & MAGAZINES

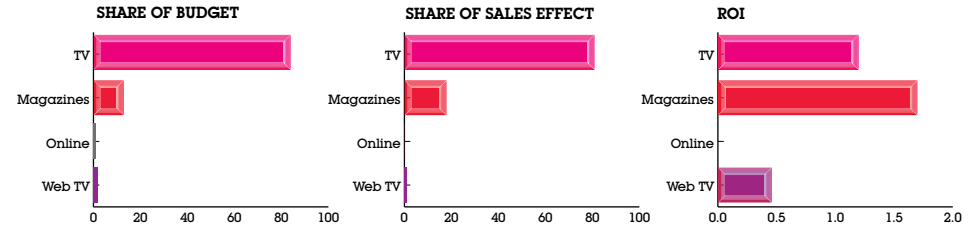
Percentage increase in sales value (£)



figures, are shown in Figure 71.

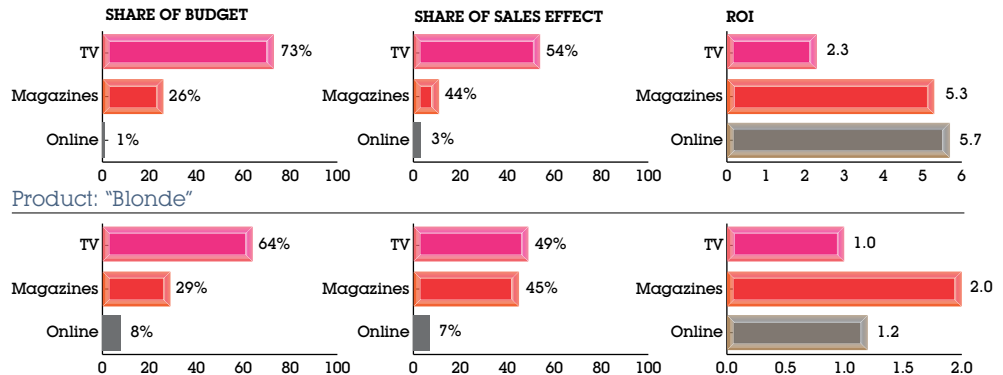
In both cases, magazines' ROI was considerably higher than that of television which took two or three times magazines' budget share. For one brand, online advertising had a slightly higher ROI than magazines, but online received only 1% of the budget and produced 3% of the sales effect. For the other brand, where online took a more significant share of the budget (8%), its ROI was lower than that of magazines.

Fig 70. GLISS HAIRCARE: MAGAZINES THE MOST COST-EFFECTIVE MEDIUM



Based on weekly sales of Gliss shampoo and treatment products, week 41 2009 to week 20 2011. ROI is calculated on sales effects & budgets in krona, not on profile percentages. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

Fig 71. SCHWARZKOPF COLOURING PRODUCTS: "ESSENTIAL COLOR"



Based on weekly sales, week 21 2008 to week 20 2011. ROI is calculated on sales effects and budgets in krona, not on profile percentages. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

Ohal's modelling also provided insights into the best way that Schwarzkopf could flight the magazine advertising in relation to the television campaign (Figure 72). Ohal modelled what would happen if magazines were used as reinforcement of TV by being published at the same time. The magazine investment produced positive returns (ROI of 1.1) but this was lower than when magazines were modelled being used to prolong the campaign, running in the weeks after the TV campaign had finished (ROI of 1.9).

Ohal's modelling has also helped guide decisions about how much to invest in magazine advertising, in relation to television investment. For Gliss haircare products simulations were made of three budget levels for magazines – in each case using magazines to prolong the advertising, i.e. running after the TV campaign had finished. The three scenarios were to invest in magazines (a) 29% of the amount invested in TV – the previous strategy; (b) reduce the magazine investment to 15% of TV's; and (c) increase the magazine investment to 65% of TV's.

The results for strategy (a) with magazines receiving 29% of the amount invested in TV are shown in Table 73. TV was assumed to run from week 2 to week 4 (yellow portion of chart in those weeks). The effect of TV decays over the following weeks (the yellow and orange portions from week 4 onwards). Magazine advertising was assumed to be introduced during weeks 8 and 9, and again in weeks 13 and 14 (red and orange portions). The effect of magazine advertising decays too, but lasts

PANEL 10

COMMENTS ON OUTCOME OF HENKEL ANALYSES

“ Yes, I was a little surprised that we could see such clear sales effects from the magazine advertising. We usually recommend that clients use magazines to build brand or increase awareness. But we rarely use increased sales as an argument for magazine advertising. This new study could change this.

For a client who has decided on TV advertising, and is considering adding magazines this could well prove to be the tipping point where they decide to use magazines as well. Retailers want to see clear effects on sales, therefore they usually want to have TV to support a trade campaign. Now we have proof that magazine advertising also has sales effects.”

Eva Westeson, Henkel account director at media agency MEC

“ It was a great insight for us, on how to optimise the usage of magazines and TV in combination with other sales driving activities. The study has provided us with arguments with more depth and insight when we speak to the resellers on how to get the most out of each campaign. With the well established brands that we have it will be cost

efficient to use more magazines. Henkel also focuses on online advertising but in combination with magazine advertising and co-operations with magazines. We want complete solutions that have a stronger impact, so we will work with more integrated print co-operations in the future.”

Catarina Tomic, Group Brand Manager, Henkel Sweden

“ We see the best results when the TV campaign is followed by a magazine campaign about two weeks after the TV burst. But we can measure an increased sales effect from magazine advertising for as long as two months after the TV campaign has ended.”

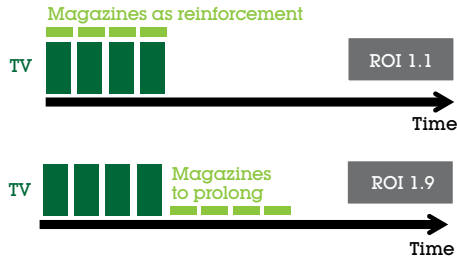
Roland Mathiasson, Director, Ohal

“ This is very useful when it comes to timing of integrated campaigns and the tactics for scheduling magazines in relation to the TV advertising. Previously magazines have usually been scheduled alongside TV since magazines have been believed to have a slow impact.”

Eva Westeson, Henkel account director at media agency MEC

campaign effectiveness: magazines in multi-media campaigns

Fig 72. GLISS: REINFORCE v PROLONG



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohai econometric modelling for Schwarzkopf, Sweden, 2011

until week 25. The sales effect was indexed at 105, overall campaign ROI was indexed as 100, and the budget was indexed as 129 (100 TV + 29 magazines).

Strategy (b) with reduced magazine investment is shown in Table 74. For magazines there is only one burst, in weeks 8 and 9. Campaign ROI is reduced to an index of 92, and sales effect falls to 86.

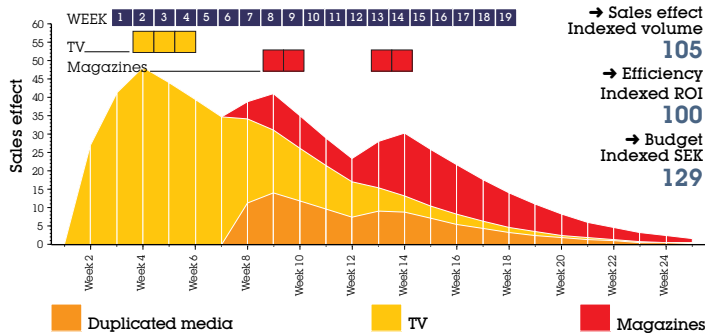
Strategy (c), which increases magazine investment to 65% of the expenditure in TV, introduces magazine advertising in week 6 (modest overlap with TV) but the main magazine coverage runs over a number of weeks, through to week 17 (Table 75). By

week 25 the effect of TV advertising has decayed to zero but magazine advertising is still having a measurable effect, and it will continue for many more weeks in a long tail (whose benefit is omitted from the ROI calculations).

Campaign ROI remains at 100: the extra investment in magazines has not reduced ROI, showing that magazine investment had not reached its point of diminishing returns because of the way it was flighted, even when given 65% as much investment as placed in TV. Crucially, this strategy pushed the index of sales effect up to 134, a very worthwhile increase on the figure of 105 for the first media strategy.

Fig 73. SCENARIO PLANNING FOR GLISS

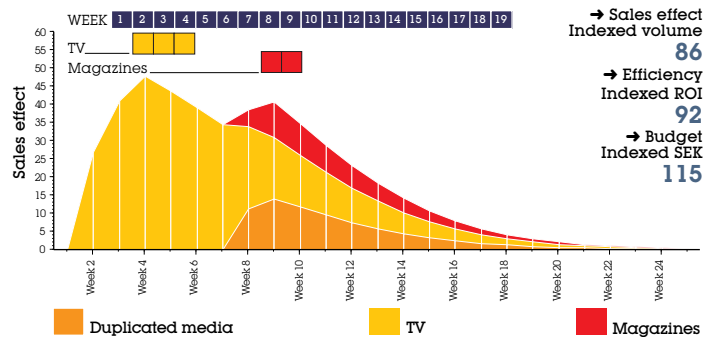
Magazine investment at 29% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohai econometric modelling for Schwarzkopf, Sweden, 2011

Fig 74. SCENARIO PLANNING FOR GLISS

Magazine investment cut to 15% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohai econometric modelling for Schwarzkopf, Sweden, 2011

Other brands, other product fields and other countries would not produce identical results to this, but the general principle is a sound one: campaigns which are dominated by television advertising could be under-investing in magazine advertising, and even investing in magazines with a sum equivalent to two-thirds of the TV budget may not be too much if flighted efficiently.

Further examples of Ohal's work for Henkel are given in the next chapter, which is devoted to econometric modelling. The main conclusions reached in those examples were:

- » The effectiveness of flyers (such as money-off leaflets) was greatest when used at the same

time as magazine advertising

- » Per exposure, magazines are on average 2.5 times more effective than TV at building purchase intention for Schwarzkopf's more established products
- » The best fighting of magazine advertising for Schwarzkopf was to avoid overlapping with heavy bursts of television, but using magazines to prolong the campaign afterwards, especially splitting it into more than one burst

The ROI relationships between media will vary from case to case; individual econometric

analyses will be needed to establish the figures for a particular brand in a particular set of circumstances. What the Henkel experience indicates is that magazines can outperform television and other media in many circumstances, and magazines deserve serious consideration for most brands. It also shows that magazine advertising helps to reinforce, and prolong, the sales effects of TV advertising.

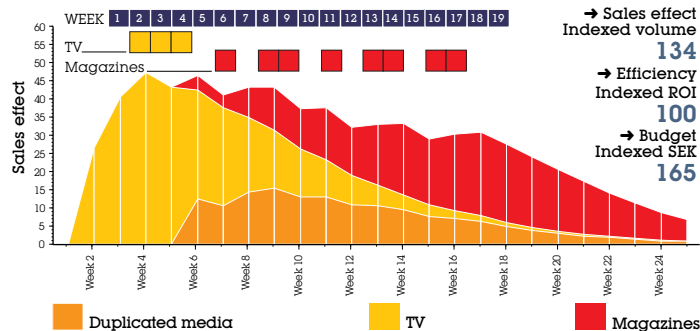
The effect of diminishing returns

Several studies reviewed in this chapter refer to diminishing returns – or more fully, diminishing marginal returns. It means that as more investment is placed into a medium, there comes a point where the return from the last krona (or other currency) is less than from the previous one – the last, or marginal, krona is diminishing in what it returns. The more additional krona that are fed into the medium, the more the return from those last krona diminishes. When these values are plotted on a graph, the line begins to flatten and eventually becomes almost flat, as in Figure 76.

The weight of evidence suggests – and in some cases proves – that investment in television advertising is often past the point of diminishing returns. The last tranche of investment is yielding much reduced returns. TV is somewhere on the shallow part of the curve. There is also the suggestion that, in mixed-media campaigns, typically too little is invested in magazine media: they are still on the steep part of the curve.

Fig 75. SCENARIO PLANNING FOR GLISS

Magazine investment increased to 65% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

Fig 76. **EXAMPLE OF RESPONSE CURVE**

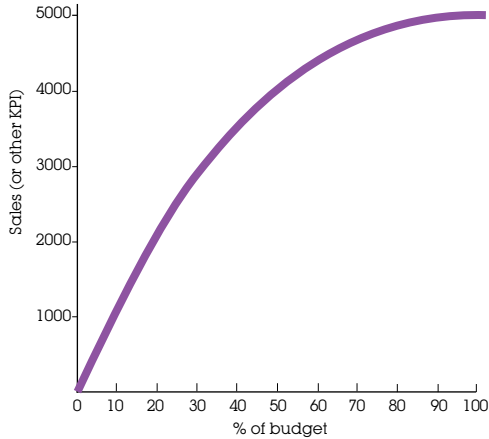
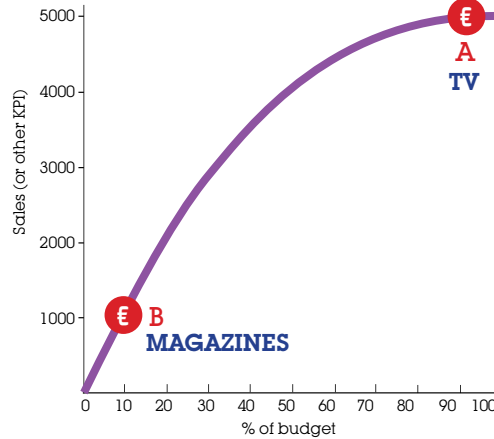


Fig 77. **TV/MAGAZINES WITH 90/10 BUDGET SPLIT**



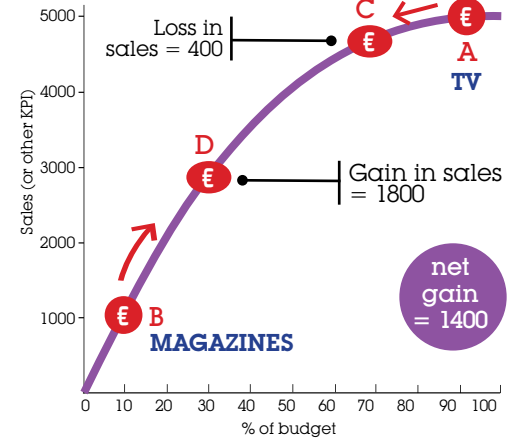
This is represented in Figure 77, and it reflects in principle those ROI statistics which show magazines with a higher ROI than television. The implication is that magazine ROI is higher because magazines are still on a steep part of the response curve while TV is on a shallow section.

When an unbalanced situation such as this arises, the solution is to switch some money out of television and re-allocate it to magazines. Figure 78 illustrates the result. (It places TV and magazines on the same response curve,

whereas in reality the two media would have different curves; however we do not know which medium generally has the higher curve, in which circumstances, and for the purpose of demonstration it will suffice to place both media on the same curve.)

Suppose TV initially receives 90% of the budget and magazines 10%, and that their starting positions on their response curves in Figure 78 are A and B respectively. The amount of response generated by each medium is indicated

Fig 78. **RE-ALLOCATING INVESTMENT BETWEEN TV & MAGAZINES**



against the vertical axis. In this illustration, the TV part of the campaign generates 4,950 units of response (for example, sales, attitude change or other KPI) while magazines generate 1,000 units. Television's ROI is 55 units per percentage point of the budget (4,950/90), while for magazines the ROI is higher at 100 units per percentage point (1,000/10).

However the effectiveness of the campaign would be increased by removing (say) 20% of the budget from TV and placing it in magazines.

TV would thus move to position C on the curve, and magazines to D. TV now yields 4,550 units of response (down by only 400 units), but magazines deliver 2,800 units (up by 1,800 units). The net gain is 1,400 units, an increase of 24% over the original allocation. ROI figures have become 65 for TV and 93 for magazines. TV's return on investment has risen because the least effective tranche of TV expenditure has been removed, while magazines' ROI has fallen because the additional expenditure is yielding less per krona than the first part of the magazine budget – yet magazines' reduced ROI remains higher than TV's increased ROI. Total response units from the campaign have risen from 5,950 to 7,350 – a clear gain for the advertiser at no extra cost.

Of course, these curves and figures are hypothetical and purely for illustration, but they show the principle. The analysis by Ohal for Henkel in Sweden provides real-life data in which the scenario analyses can be interpreted in this way. There is other evidence which supports this, including some of the other analyses and studies quoted in this book. Professor Michael McCarthy of Miami University in the USA touches on this issue in his comments about Procter & Gamble's recent shift in advertising investment, in the next section.

There is a limited amount of evidence that increasing margins returns may exist at the very beginning of the curve. It may require two or more exposures before a campaign has a measurable effect on consumers.

"I THINK WHAT THEY (P&G) ARE FINDING IS THAT INCREMENTAL DOLLARS (IN TV) DON'T GET YOU MORE RETURN, COMPARED TO PUTTING THOSE DOLLARS INTO MORE TARGETED MEDIA."

Professor Michael McCarthy, USA, 2012

P&G shifts ad spend from TV to magazines

It is very worthwhile putting all these arguments to marketers and to their media agencies. It really *can* influence perceptions and modify media decisions. One illustration is this article from the US publication *Business Courier* on 27 March 2012, headed *Procter & Gamble shifts ad spend from TV to magazines*:

"Procter & Gamble is still the nation's biggest advertiser, but it's dialing back those marketing dollars and shifting some of its focus from television to magazines. Figures from Kantar Media show P&G spent \$2.95 billion in 2011, down 5.4 percent from the prior year. P&G remained the nation's largest TV advertiser despite a 6.8 percent spending dip to \$1.7 billion. A March 2012 news release from Kantar Media says it's the ninth straight year that P&G has ranked as the top advertiser in the U.S. 'While TV is still the foundation of its advertising media buys, P&G's 2011 budget allocation saw share gains for magazines at the expense of TV', the release stated.

"Those numbers reflect a more targeted approach to media buying by P&G," said Michael McCarthy, a marketing professor at Miami University. 'I think what they're finding is that

incremental dollars don't get you more return, compared to putting those dollars into more targeted media,' McCarthy said.

"McCarthy said magazines might also be getting an increased share of P&G's advertising dollars because the industry has reliable metrics that can be used to target specific audiences. Digital measuring, including click-through counts and products that measure social-media mentions, are not nearly as well established as the traditional media, McCarthy said."

The accurate targeting and reliable metrics provided by magazines, and the evidence about diminished returns from the last tranches of expenditure on television – these are indeed key factors which Professor McCarthy has rightly identified. ●



WORLD MAGAZINE TRENDS 11/12



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9

Using econometric models to assess media effectiveness

Econometric modelling is increasingly used for guiding media strategy decisions. Magazines can benefit, with very competitive ROI figures, provided the right inputs are used. Especially readership accumulation data.

Econometric modelling can be a great friend to magazine media. It can identify in a quantified form the best ways of using magazines for each specific advertiser. From this emerges statistical proof of the strengths and effectiveness of magazines. The results of modelling can help change attitudes towards magazine media, in a positive direction, showing in fresh ways the medium's power. But to achieve this it is imperative that appropriate data on magazines is fed into the models.

Increasingly, advertisers' strategic media decisions are being guided by econometric modelling of a brand's historic performance data, to judge the effectiveness of each medium that was used. In some countries the majority of

campaigns with large budgets are assessed in this way, driven by the need for accountability of every element of marketing expenditure. In the USA the Association of National Advertisers ran an *Accountability Study* in 2008 [104] and found that 60-70% of member advertisers use marketing mix models; the proportion is likely to have risen since then. It is thought that a broadly similar proportion applies to other highly-developed advertising markets, and that the trend towards modelling is rising throughout the world.

For magazine publishers it is vital that the medium's return on investment is calculated in a way which reflects its true power, relative to television, the internet, newspapers, radio,

promotions and other ways of spending marketing money. Unfortunately magazines are sometimes treated in a manner which puts the medium at an unwarranted disadvantage.

In addition to illustrating the positive outcomes for magazines of modelling, this chapter reviews what the problems are, what can be done about it, and the importance of publishers questioning existing modelling methods.

What is econometric modelling?

Econometric modelling is a form of statistical analysis which makes sense of mountains of data on a large number of factors, leading to actionable insights. It evolved through trying to understand how the national economy worked, L

but is now widely used in many other fields, marketing being a prime example.

In the context of media strategy, econometrics involves analysing detailed data on:

- » The variable which the campaign is trying to maximise – usually but not always sales. This is the 'dependent variable'.
- » Advertising expenditure in each of the media used in recent past campaigns
- » Audience achievement for each medium
- » A host of other factors which may have an influence, such as distribution changes, promotions, competitive activity, seasonality, relevant macro-economic factors, and so on
- » The timescales during which each of these factors occurred. For media, this means the flighting of the advertising.

Econometric modelling uses statistical techniques such as multivariate regression to find out the contribution made by each of these factors in determining the figures observed in the dependent variable – for instance, each factor's impact on sales.

Such modelling is especially suitable for separating the effects of each medium. This is usually summarised by calculating an overall return on investment (ROI) for each medium. In addition to such summaries, modelling can be used to investigate more detailed media questions.

Louise Cook & Mike Holmes, in their booklet *Econometrics Explained* written in 2004 for the IPA in the UK [105], listed these examples:

"Econometric analysis offers... a means by which to test hypotheses... We can use econometrics to test whether these are upheld by the available data. For example:

- » press vs television vs other media
- » burst vs drip
- » by time of year (media cost and relative effectiveness may be issues)
- » relative to previous activity (recency)
- » What are the most effective coverage or frequency levels?
- » Are particular weights of advertising more effective?"

"Media tests may be conducted to explore issues like changes in advertising weight, campaign or media flighting. Econometrics can be used to quantify the effects of these tests and to provide confidence intervals for those estimates."

A study, reported in the paper *Magazines & Media Mix Models: Prescription for Success* by David Shiffman and others [106], interviewed leading modelling companies in the USA. The paper asked "Why are media mix models utilised? It is to:

1. Determine overall marketing/campaign effectiveness and in particular the relative effectiveness of each element of the plan.
2. Justify total marketing/advertising investment (overall and by channel) to senior management (increased need to justify in current economic climate).

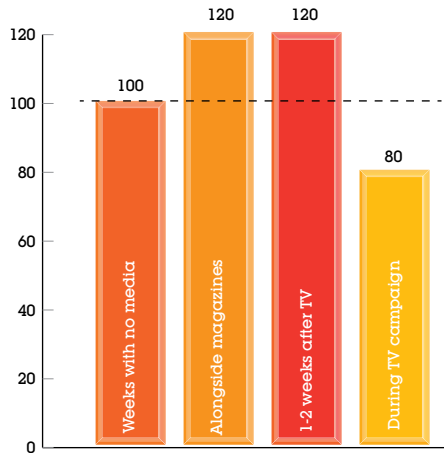
3. Determine optimum media mix as a basis for future campaigns.
4. Establish optimum spend, weight levels and scheduling tactics to guide future investments.
5. Assess the contribution and ROI of individual elements (specific magazines or genres, for example) of the media channel, provided that weight levels are sufficient to allow for measurement."

What modelling can teach us: the Henkel studies in Sweden

Some results of econometric modelling by Ohal in Sweden in 2011, on behalf of publishers association Sveriges Tidskrifter, have been described in the previous chapter, based on Henkels' Schwarzkopf haircare products [103] - not least the conclusion that for Gliss its magazine advertising achieved a higher return on investment than television advertising; and that it would pay Gliss to invest in magazines a budget equivalent to 65% of the TV budget when flighted efficiently.

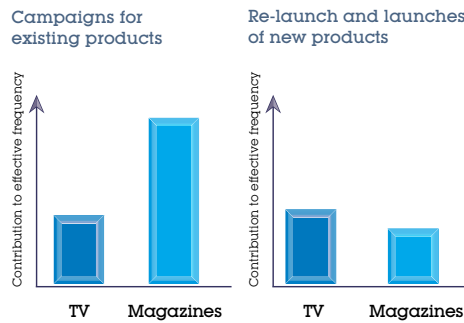
This section looks at three examples of media issues for which the modelling may provide guidance: (a) when is the best time to use flyers such as money-off leaflets; (b) comparison of launch versus established brands; and (c) comparison of three strategies for flighting magazines in relation to TV.

Fig 79. ROI OF FLYERS FOR GLISS HAIRCARE PRODUCTS, BY MEDIA



Based on weekly sales of Gliss shampoo, conditioner and treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

Fig 80. PURCHASE INTENTION FOR SCHWARZKOPF PRODUCTS



Source: Ohal econometric modelling for Schwarzkopf

(a) When to use flyers

Ohal's modelling found that the effectiveness of flyers for Gliss was maximised when used at the same time as magazine advertising, or 1-2 weeks after the end of the TV campaign (which was generally when magazine ads were running anyway). In Figure 79, the ROI of flyers during weeks when there was no magazine or TV advertising was indexed as 100. Flyers' ROI increased by 20% when they were used alongside magazines – implying that seeing magazine ads in print prompted greater attention to the printed flyers and prompted more action. Flyer's ROI was reduced by 20% when accompanied only by TV. For flyers, the difference in effectiveness

between TV weeks and magazine weeks was therefore around 50% (i.e. $120/80=1.50$). Flyers were 50% more effective when used at the same time as magazines compared with when used at the same time as TV.

(b) Established brands versus launch brands

Another example of a question on which modelling can provide guidance is strategies for launch versus established brands. Ohal reported that per exposure, magazines are on average 2.5 times more effective than TV at building purchase intention for Schwarzkopf's more established products, whereas for launches television was rather more powerful than magazines (Figure 80).

(c) Flying of magazines

Ohal modelled the performance of three ways of flying a Gliss fixed magazine budget which was 29% of the size of the TV budget (Figure 81).

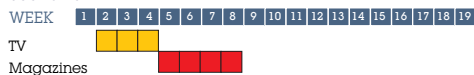
When the magazine advertising followed TV immediately and was used in one block, the sales effect was indexed as 100 (Scenario 1). A policy of overlapping with heavy bursts of TV advertising (Scenario 2) reduced the sales effect by 4%. Best of all was leaving a small gap between the end of the TV and the start of magazine advertising, and breaking the magazine investment into two blocks (Scenario 3). This produced an index of 105. Thus the sales effect for Gliss would vary by up to 10% according to the magazine flight pattern adopted.

However one cannot assume that it is always

Fig 81. FLIGHTING STRATEGIES FOR GLISS MAGAZINE ADVERTISING

At constant ad expenditure

Scenario 1



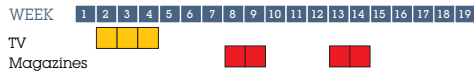
→ Sales effect indexed volume **100**

Scenario 2



→ Sales effect indexed volume **96**

Scenario 3



→ Sales effect indexed volume **105**

Based on weekly sales of Gliss shampoo, conditioner and treatment products, week 41 2009 to week 20 2011. Source: Own econometric modelling and scenario testing for Schwarzkopf, Sweden, 2011

more effective to use TV and magazines in a non-overlapping way. It would work for Gliss, but there is evidence pointing in the other direction too – that when TV and magazines overlap in time the advertiser receives the communication

benefit of the media multiplier effect, whereby the advertiser's messages are better understood when received through two or more media forms. Examples are quoted in FIPP's *Take A Fresh Look At Print 2* [93] of campaigns whereby sales were maximised when TV and magazines were run at the same time. It is evident that we need more analysis of this kind, to better comprehend the circumstances favouring one strategy or the other.

These examples (a)-(c) are just three illustrations of facets of magazine media advertising which can be studied and better understood through econometric modelling. This kind of work can help advertisers to make optimum use of magazine media, thereby maximising magazines' return on investment – and thus boosting the evidence-based arguments for placing more investment in them. Clearly, publishers need to become more involved in modelling.

Five problems for magazine media

Needless to say, it is crucial for the magazine medium that the best available information on its audience achievements are used in the modelling process. If important types of data are missing, the effectiveness of the medium is very likely to be under-estimated, resulting in an unwarranted loss of advertising revenue.

In their paper *Magazines and Econometrics*, written for FIPP in April 2012, Jim Jarrett & Marcos Pereira of Mindshare UK [107] listed five problem areas that affect magazines:

1. Modelling is a backward focused science, since you can only see what's happened in the past as a predictor of the future. As such, it may inherently encourage advertisers to *stick with what they know* in media evaluation, and may discourage introducing channels not previously used.
2. As part of the process of modelling, one of the stages is to identify which variables are most influential in affecting the model so that the number of variables can be rationalised and reduced. Variables that have low explanatory power may be dropped because they can't be proven, statistically at least, to be making a contribution to the model. For a medium which is often comparatively low weight, such as magazines, this can too often be the case.
3. If too much is going on at once, for instance a significant advertising activity is under way, it can be difficult to discern the contribution of individual elements to the overall campaign. Consequently the heaviest weight activity, usually TV, may gain the attribution at the expense of other media. This can do a disservice to magazines.
4. The attribution of channel response to 'press' – the aggregation of magazines and newspapers to a single medium. This can have both positive as well as negative implications: aggregating together makes both media bigger and reduces the 'small

media' effect. The contrary situation is that their individual contributions are not recognised; in particular, magazines' unique contributions may be misattributed.

5. Perhaps the biggest obstacle which magazines face is that magazine exposures may be misallocated by the modeller. We know from readership accumulation studies that publications accumulate their readership over time, and that different publications accumulate over different periods of time. Though we know this, all too often it is easy for the modeller to overlook and assume for the purposes for modelling that all readership or GRPs (gross rating points) are attributed in the week in which the title is published (since at an aggregate level the GRPs are correct). This is a good deal easier than the effort required to input the magazine insertions into a print planning tool and then have that distribute the GRPs correctly. This step can be quite time-consuming and only really affects magazines since daily newspapers' GRPs are largely delivered in the week in which they are published. If mis-allocation is done, the effects of this are that magazine GRPs are concentrated in the on-sale weeks. In a crude example, sales effects may be attributed only in the week of the on-sale date, not in any subsequent weeks, making the contribution of magazines look more expensive than it really is, compared to other media."

"MAGAZINE PUBLISHERS NEED TO HAVE AN UNDERSTANDING OF WHY ADVERTISERS USE ECONOMETRICS, AND ITS POTENTIAL SHORTCOMINGS, IF THEY ARE TO MAKE A CASE FOR THE MEDIUM."

Jim Jarrett & Marcos Pereira, Mindshare UK

Distributing magazine exposures

That fifth point, about readership accumulation, is a priority for magazine publishers to do something about.

Chapter 1 has already described the way that magazines accumulate their readerships. It takes place over time, at two levels. Figures 9 and 10 give examples of accumulation curves for readers' first exposure to an issue. Second and any subsequent exposures obviously occur slightly later. Figure 11 gives an example of the distribution through time of an issue's total exposures: each reader's first exposure (the usual meaning of an accumulation curve) and all subsequent exposures for each reader. Repeat reading extends the duration of magazines' delivery of ad exposures.

When doing modelling, if all exposures delivered by a specific issue of a magazine are allocated to the on-sale day or week, a significant portion of the true relationship between magazine exposures and the sales of the advertised brand would be destroyed. Modelling

depends on matching patterns – usually the weekly patterns of sales and the weekly patterns of ad exposure to each individual medium. If magazines' weekly pattern is distorted, it means that the link between the two is diluted. Put another way, the medium's ROI will be underestimated. On top of that, the ROI of other media will be over-estimated (magazines' missing ROI will be spread across the other media), thus further reducing magazines' relative position.

Magazine ROI under-estimated by a fifth

What actually happens in practice? To test this, the USA paper *Magazines & Media Mix Models: Prescription for Success* by David Shiffman and others in 2009 [106], reported on building an econometric sales model and experimenting by varying the inputs for magazines. Sales data were entered into the model week by week. In the key test, magazine readership data in the form of gross rating points (GRPs) were entered in two ways: allocating all of a month's GRPs into the first week of the month (a rough approximation to saying all of a monthly's readership occurs in the first week of publication); and spreading the month's GRPs week by week through the month – a far more realistic pattern.

The result of the test was that the more realistic week by week distribution of magazine GRPs increased the medium's reported effectiveness (ROI) by 18%.

An improvement in ROI of about a fifth is quite sufficient to alter media choice decisions in many

instances. Moreover the experiment did not fully replicate the true distribution of magazine exposures week by week. Allocating a monthly magazine's total GRPs across a whole month is much better than all going into the first week, but spreading those GRPs across a longer period in full accordance with readership accumulation curves would be even better, and can be expected to produce an even closer alignment of magazine exposures with sales. Therefore the measured 18% improvement may itself be an under-estimate of the impact of using readership accumulation data.

"WE NOW HAVE EVIDENCE THAT PROPERLY CONVERTING MAGAZINE ACTIVITY TO (WEEKLY) GRPS IS WORTH THE EFFORT."

Douglas Scott, Millward Brown, USA

The paper's authors summarised by saying "The benefits of weekly GRPs are: best aligns with sales inputs; provides better variability in data, an important driver in a model's ability to measure volume contributions; increases likelihood of measuring individual elements within the print campaign; and more accurate representation of media weight distribution."

On the wider implications, the authors concluded "The examples paint a clear picture that improper print data inputs greatly undervalues the impact that this medium has on a brand's business results; extrapolating this out to the marketplace at large, less-than-ideal inputs for print minimises the perceived

overall contribution, value and importance of print advertising in the total marketplace. The implications of this are significant - improper input for print underestimates its impact and overstates the impact of other channels, which can lead to less than optimal allocation of advertising budgets."

The paper's findings were matched by another investigation in the USA, reported in the 2009 paper *Better Representing Magazine Effects in Marketing Mix Models* by Mark Reggimenti and others [108]. They used econometric modelling to test six brands, using three key

performance indicators (KPIs): positive buzz, positive impression of brand, and willingness to recommend. Aggregating across all six brands, the reported effectiveness of magazine advertising was substantially higher when readership accumulation data were employed in the models than when they were not. The improvement averaged 20% or greater on all three KPIs.

In some instances modellers use ad expenditure as a proxy for magazine audience inputs. This is even worse than using magazine GRPs and putting them all into the on-sale week. In the USA Millward Brown, a research company employed by many major advertisers for conducting media modelling, re-analysed a

series of existing modelling studies to see how results were affected by using dollars instead of weekly GRPs to represent magazine inputs [109]. When using dollars, they are typically allocated to a magazine issue's on-sale date. The result of the comparison was that the use of dollars captured only one third of the real weeks that were supported by magazine advertising, and it reported (falsely) very wide variations in magazine activity week by week. This in turn will heavily under-estimate the real relationship between magazine investment and sales or other KPIs.

The *Magazines & Media Mix Models: Prescription for Success* study [106] was another to show that the use of ad dollars under-estimated magazines' contribution more severely than using GRPs allocated to the week of publication.

Why is accumulation data commonly not used?

Since readership accumulation data is so important in revealing the value of magazine advertising, why is it commonly not used? The main reasons appear to be lack of knowledge of its importance, or even its existence, and the amount of labour-intensive time-consuming work that may be required to apply it.

Jarrett and Pereira wrote, concerning the UK, "Though modellers try to be robust, it is a question of modeller knowledge (that magazines behave in this way) and time (will it make any significant difference to the overall strength of the model when I present it to my client). The

correct estimation of magazine GRPs can be one of the most time-consuming and manual stages in the modelling process. For what may be comparatively low weight media, it may seem more effort than it is worth."

In the **USA** the media and marketing consultancy Sequent Partners, on behalf of GfK MRI, conducted interviews among modellers, advertisers and media agencies [110]. One of the executives at a media modeller company explained why the data on magazines which goes into media models is often poor, and excludes readership accumulation: "What often happens is that a very junior person at the media agency, who doesn't necessarily know what they are doing, pulls the data."

What can be done about it?

There are two key things magazine publishers can do:

1. Make sure agencies and modellers are aware of the importance of building readership accumulation data into their media mix models;
2. Make it as easy as possible for modellers to receive all the relevant data on the magazine medium.

Therefore the process of inputting high-quality magazine data should be automated as far as possible. Existing examples occur on both sides of the Atlantic Ocean.

Jarrett and Pereira wrote "In an attempt to

"IN SOME CASES THE LABOUR-INTENSITY OF GENERATING OPTIMAL INPUTS (FOR MAGAZINES) IS A BARRIER TO IMPLEMENTING BEST PRACTICES" IN MODELLING.

MPA's guide Marketing Mix Modelling & Media Inputs, USA, 2010

address this issue Mindshare **UK** have worked with our providers of competitive media schedules (Nielsen) and print planning systems (Telmar Communications) to automate this process so that schedules can be exported from Nielsen's spend product into Telmar's print planning software for correct GRP estimation through time. This is one example of how the magazine industry can help give econometricians easier access to the relevant GRP data to estimate their contribution correctly"

In the **US**, GfK MRI has developed a syndicated product called Granularity [110] whose most fundamental purposes are to translate magazine insertion schedules into weekly ad exposure estimates, and deliver them to modellers in an easy-to-use form via a web portal.

Other kinds of data on magazines

It would likely further help magazines to prove their value on mixed media schedules if certain other kinds of data were included in the models – data which goes beyond readership and describes

magazine's performance in more detailed and accurate ways. Models rely on pattern recognition in which fluctuations in marketing elements such as magazine advertising are isolated and compared with fluctuations in sales or other outcomes; the closer the two patterns match, the stronger the incremental effects which are attributed to the magazine advertising.

Examples of further kinds of magazine data include ad noting scores (so the models can evaluate ad recall rather than mere 'opportunities to see'), figures on weekly reach to complement weekly GRPs, measures of engagement, and information on actions taken. Specific-issue readership, which measures the variation in readership of a magazine from one issue to the next, would also help, where available. Taking account of repeat reading would also make a difference – allowing that the average magazine ad is looked at more than once, and that (by definition) the second and subsequent exposures occur over a longer period of time than the first exposure.

In general, what is needed is any types of information which provide a more precise, accurate and detailed description of how magazine advertising has worked within a particular campaign. This is what will give the medium its best chance of showing a strong relationship between the investment in magazines and the advertiser's key performance indicators. That is, it will maximise the medium's reported return on investment, taking it closer to what is actually achieved, instead of leaving it

under-estimated.

In the **USA** a set of guidelines for best practice in setting up a media mix model and interpreting the results has been drawn up by key players from agencies, clients and modelling companies. They have been published by MPA [111].

A continuous readership diary panel?

The inputs required by media econometric models were originally designed to handle audience data for media with weekly-updated audience figures – particularly television.

Television, radio and internet audience estimates can be consolidated on a weekly basis. Readership estimates for daily newspapers can be fitted into a week by week pattern much more readily than for magazines.

The availability of weekly audience estimates aligns well with advertisers' sales figures which are normally available on a weekly basis. Thus media mix modelling has come to depend on accurate weekly inputs for each variable.

Magazine readership data do not flow in a similar weekly pattern, putting the medium at a

disadvantage in the models, as already discussed.

A more dramatic and long-term solution may be to abandon the traditional 'recent reading' approach to measuring magazine audiences, which is very dominant worldwide, and replace it with a technique which can more readily produce an updated stream of weekly readership and ad exposure figures.

One example might be to create a continuous readership diary panel, which would automatically take account of the time dimension (readership building up across a number of weeks), the repeat reading and its timing, the variability of readership issue by issue, and possibly ad exposure.

Data from multiple sources might be combined into one 'virtual' diary. This idea has been described in a paper called *Magazines Need Time* at the FIPP Research Forum in May 2012 by Peter Masson of Bucknull & Masson, **UK** [112]. It raises many technical issues concerning magazine audience measurement, but in the long run it may prove a worthwhile step in giving the magazine medium a fair hearing when strategic media choices are being made. ●

"WE MUST HAVE ACCURATE AND COMPREHENSIVE MEASURES OF AD EXPOSURE (IN MODELS). THERE IS A LOT ON THE LINE, AS INACCURATE MEASUREMENT CAN LEAD TO TOTALLY THE WRONG JUDGEMENT ABOUT WHAT PARTS OF THE MARKETING MIX ARE, IN FACT, WORKING."

Joel Rubinson, Advertising Research Foundation, USA

CREATIVITY TRANSFORMING MAGAZINE MEDIA PUBLISHING

From scratch and sniff to 'sapplets' and the magazine as a handbag, FIPP's third Innovations in Magazine Media World Report has it covered. Co-published by Innovation International Media Consulting Group and FIPP – the worldwide magazine media association – the 2012 Report showcases new, dynamic and lucrative innovations in all aspects of magazine media.

Digital developments are at the fore, and this year there is a major focus on how advertisers and media owners are breaking new ground together, including the emergence of 'sapplets' or social applets. And a whole section is devoted to great ideas that engage the reader with the product including: an ad from BBR Saatchi & Saatchi that changes on a page, driven by solar power for Israeli energy company Shikun & Ninui Solaria, a Carlsberg ad that works as a bottle opener, whispering audio chips in Playboy covers, a 'self-drive' ad for Volkswagen plus a Cannes award-winning 'talking dictator' ad using QR codes for Reporters Without Borders.

OTHER CHAPTERS INVESTIGATE:

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ABOUT FIPP

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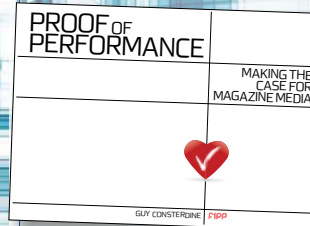
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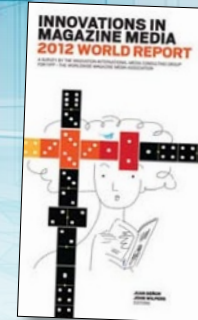
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