

HOW MAGAZINE ADVERTISING WORKS

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INTRODUCTION TO THE FIFTH EDITION

The pace of development in media research seems to be accelerating. It is fuelled by the advance of the digital media, which is leading to new ways of thinking about media choice when planning advertising campaigns. This in turn creates a demand for new (or at any rate modified) kinds of information, and thus speeds up research.

Ten years after the first edition of this report was published in 1995 the fifth edition is necessary, in order to incorporate the new learnings. The conclusions about the effectiveness of magazine advertising remain the same but they are strengthened by the fresh evidence.

The purpose of this new edition, as for all its four predecessors, is to set out a description of how magazine advertising works and to support every step of the account by citing research evidence.

More than 300 research studies have been referred to in compiling this report. The sheer number of studies available has forced me to be very selective in the choice of surveys to build into my review. Moreover I have summarised most of them within a handful of paragraphs or less. This hardly does justice to them as individual surveys but in all cases a reference is given so that readers can examine the research in more detail if desired, and sometimes a link to a website can be provided.

A new feature of this edition is that the report now has its own website, www.hmaw.net for presenting updates and additional material. The site is described in the final section of this report.

The main focus of the report is on the UK, but in a number of places I have referred to surveys from other countries where they contribute evidence of a kind that is not available in the UK, or where they provide important reinforcement of UK results. It is in fact very clear, from the mounting evidence from dozens of countries around the world, that the characteristics of magazines which this report celebrates are not confined to the UK. Readers' love of their magazines, and the effectiveness of advertising in the medium, are truly global phenomena.

I would be pleased to receive suggestions of new material for inclusion in a future edition or on the report's website, or any comments about this edition.

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PPA Marketing provides research and data to help agencies and clients get the most out of consumer magazines. The magazine medium is a fast changing dynamic industry and to ensure that you are kept up-to-date with the latest magazine research go to www.ppamarketing.net. New research, which is reviewed in this report and can be downloaded from PPA Marketing, includes *Magazines Uncovered*, a study looking at the sales effect and return on investment that can be achieved by using the medium. The study reviews real sales from real ad campaigns. It looks at how sales occur over time and the relationship to when the advertising was seen by the consumer. It also looks at the implications that this has on how advertising should be planned in magazines.

PPA Marketing has also developed training courses for agencies and clients to ensure that new thinking in how the medium works can be discussed.

If you work for an advertising agency, client or magazine publisher and would be interested in talking more about the magazine medium please contact PPA Marketing. I hope that you find *How Magazine Advertising Works* a helpful guide to getting the most from advertising in the medium.



EXECUTIVE SUMMARY

This report is a synthesis of the large body of existing research which demonstrates how readers use

magazines, how the advertising within them works, and that magazine advertising sells products.

THE READER RELATIONSHIP

- The magazine medium's essential strength lies in the active way in which readers choose and use their magazines. Magazines are an active medium, with the reader in control.
- Since different categories of magazine fulfil different needs they work in different ways, which are well adapted to their readers' requirements. Similarly, within categories there are vital distinctions of character between individual titles, giving each title its own unique positioning.
- Readers become deeply engaged with their magazines. As a result a strong relationship, a bond of trust, grows up between the reader and his or her chosen magazines. Reading a favourite magazine is like talking with a friend.
- A reader's identification with an engaging magazine can go well beyond the simple provision of information and ideas. When a magazine strikes a chord it can reinforce the reader's own self-image. This creates a particularly powerful and trusting relationship.
- Readers give commitment to their magazines. The time spent reading is substantial, and the copies are read thoroughly. Copies tend to be read repeatedly, often picked up more than once during a day and on more than one day. More than 90% of all pages are opened by the typical reader. The average page in a paid-for magazine is looked at 2.5 times by each reader.
- Readers have their own repertoire of magazines to meet different needs and moods. Matching the mood and the magazine reinforces the values of the personal relationship and ensures that reading takes place in a highly receptive frame of mind.

THE ADVERTISER RELATIONSHIP

- The intimacy between reader and magazine benefits advertisers. The magazine environment delivers a reader in the right frame of mind to be receptive to the advertising. In the sympathetic context of the right magazine, the strong positive brand values of the magazine can transfer onto the advertisements.
- The stronger the reader's affiliation with the magazine as a brand, the higher the level of endorsement that the advertising receives from the magazine's personality.
- Advertising is seen as an integral part of magazines. Relevant advertising is valued by readers, and is consumed with interest. Readers screen advertisements in much the same way as they screen the editorial - looking for items that interest, intrigue, catch the eye, entertain, inform.
- Because advertisements are relevant and valued, ad clutter is not a problem in magazines. Clutter does not depress reading of ads, and may create a marketplace.
- Readers take action as a result of seeing advertising in magazines.
- Targeting with precision and without wastage is a key strength of magazines.
- The communication can be enhanced by using different creative executions in different types of magazine - targeting through the creative work as well as through selecting the appropriate audience.
- Creative formats such as gatefolds, textures, special papers, samples, sponsorship, advertisement features ('advertorials'), and so on can create additional impact and interaction.
- The 'presenter effect' means that the interpretation of a given advertisement can be influenced by the specific publication in which it appears.
- It is wise to pre-test the creative executions in order to ensure that they take maximum advantage of this active involvement in advertisements, and that they communicate the intended messages.

EVIDENCE THAT MAGAZINE ADVERTISING SELLS PRODUCTS

- The landmark 'Ad Track' survey proved that magazine advertising can generate marked increases in advertising awareness.
- 'Ad Track' also proved that magazines can generate movement in willingness to consider buying the advertised brands.

- PPA's 'Sales Uncovered', a 2005 analysis of TNS Superpanel data, showed that magazine advertising was associated with an 11.6% uplift in sales of fmcg products, in money terms. In volume terms, the uplift was 18.1%. There were also increases in market share, brand penetration, and weight of purchase.
- 'Sales Uncovered' also showed that the medium term (12 month) return on investment from magazine advertising was £2.77 for the average fmcg brand. This is comparable with that of television advertising.
- There are many studies and case histories in which magazine campaigns are shown to sell products effectively and sometimes dramatically. PPA, IPA, FIPP and individual publishers have all released examples.

CHANNEL PLANNING: POSITIONING MAGAZINES WITHIN THE TOTAL MEDIA ENVIRONMENT

- 'Channel planning' is a fresh way of looking at the planning of communication campaigns. 'Communication' is wider than 'advertising'. A greater number of communication channels are being considered than in previous decades. This imposes fresh requirements on the provision of research.
- Publishers need to spell out how magazines fit into the mix of channels, defining the unique contribution of magazines.
- In comparisons between six media – magazines, newspapers, newspaper supplements, TV, radio and websites – magazines lead in terms of providing interesting information and being tailored to users' needs.
- Advertising in magazines is seen more positively than advertising in other media.
- Magazines, followed by websites, are the most action-oriented of the six media.
- There is growth in multi-tasking – using another medium or doing some other activity while consuming media – but magazine reading has relatively low distraction. When sharing time with television or radio, magazines attract the main attention.
- Magazines and the internet work well together. Information in magazines sometimes leads readers to obtain more details on the internet, and they may then purchase something as a result of exposure to both media.
- Customer magazines improve the brand image of the commissioning companies, and boost consumer spending on the brand by about 8%.
- Sales promotions work better when accompanied by magazine advertising. However promotions are not necessarily profitable at all.

MIXED-MEDIA ADVERTISING: THE EFFECTIVENESS OF COMBINING MAGAZINES AND TELEVISION

- Magazines and television are complementary to one another. TV advertising is powerful, intrusive but fleeting. Magazine advertising is under the control of the readers, carries the reader-relationship values, and can reach light viewers. There is clear evidence that a TV-plus-magazines strategy will be more effective than a TV-only campaign.
- Most TV-only campaigns give inadequate weight to important sectors of the market - lighter viewers of commercial television, who tend to be younger, upmarket and better educated. A combination of television and magazines can achieve a very considerable improvement in the way exposures are distributed across the audience. In other words, better targeting.
- Because of the different ways in which the two media work, the communication from a TV campaign can be enhanced by adding magazines. Magazines can both convey new information that is not in the TV commercial, and lead people to perceive the TV commercial in new ways. The result is a richer, more complete communication. Magazines make television work harder. The page and the screen nourish each other.
- Magazine campaigns create awareness at a very similar level to television. The Adtrack study showed that across a range of campaigns, the average awareness achieved by 100 gross rating points in TV was 13%, and in magazines the average was exactly the same, 13%. But the magazine exposures are generated at roughly half the cost of TV.

- Evidence from America reached the same conclusion: dollar for dollar, magazines deliver significantly higher advertising awareness levels than television.
 - PPA's 'Sales Uncovered' 2005 study showed that magazine advertising has a similar sales effect to television advertising, but at a much lower cost.
 - Reinforcing this, PPA's earlier analyses of consumer panel data also found that magazines produce significant gains in market share when used in combination with television advertising. Among the heavier-reading section of magazine readers, magazine advertising increased average brand share by 11%, over and above the effect of the television advertising.
 - Other analyses from America showed that, dollar for dollar, magazines generate more sales than television.
 - More and more market tests and case histories, in UK and elsewhere, are proving that mixed-media TV-plus-magazines campaigns out-perform the TV-only strategy in selling products.
 - The improved performance from a mixed-media campaign is due to a combination of better targeting (especially among the lighter/younger/upmarket segments) and more powerful communication than television alone can deliver.
 - The 2004 NRS Readership Accumulation Survey
- enables exposures to magazine advertising to be distributed through time in an accurate way, reflecting the rate of build-up of readers of a magazine issue. This means that magazine advertising can be planned in the same way as television advertising: through weekly ratings points and weekly reach estimates.
- All media are subject to diminishing returns, and many television campaigns appear to have reached the point of very low marginal returns. The marginal TV money would be better spent in another medium, especially magazines.
 - There are strong arguments for continuous advertising pressure (as opposed to heavy bursts with gaps in between). Magazines are excellent at delivering this, whether on their own or in combination with other media.
 - When TV and magazines are being used together, it pays to put at least 25%-30% of the budget into magazines, according to several studies.
 - Television and magazine advertisements should run together rather than at different times, so the messages can interact for maximum synergy.
 - In times of recession, it pays to maintain or even increase one's advertising instead of cutting it.
- This report has its own website for providing updates and new research, and more detailed information: www.hmaw.net

(A) THE READER RELATIONSHIP

1. PEOPLE HAVE A VARIETY OF INTERESTS AND NEEDS

PEOPLE'S INTERESTS VARY

The strength of magazines begins with the fact that people have strong interests and needs, and these interests vary from person to person.

Even among those interested in a particular broad subject area there are distinctions between people in terms of the nature of their interest in the subject. These distinctions are much less obvious than those between broad subject areas. The gardening market furnishes an example. A survey conducted by Marketing Direction for EMAP Apex [1] used cluster analysis to segment the market in terms of attitudes and reasons for interest in gardening. Eight clusters were identified. Ranked in order of size, they were labelled:

- Accomplished flower gardener
- Leisure gardener
- Maintainer
- Developing Enthusiast
- Culinary gardener
- Second career gardener
- Private hobbyist
- Low budget gardener

These different groups have different requirements from gardening magazines. And the magazines serving them have developed varied characteristics, with many of them appealing to different shades of interest. The readers are in fact served by about a dozen mainstream gardening magazines and also a variety of very narrowly focused titles. This specialisation means that each magazine can get very close to the people with the particular attitude and focus which the title offers.

NINE BASIC MEDIA NEEDS

The Henley Centre [2] has identified nine basic media needs, split into two main classes: informational needs and cultural needs. The nine are:

Information needs:

- **Instrumental:** information for daily life such as weather, transport, traffic, sales, opening and closing times, etc.
- **Analysis:** to understand the world, form views, have opinions.
- **Enlightenment:** keeping up with the world, national and local events; being and becoming informed.
- **Self-enhancement:** bettering ourselves, self-enhancement, knowledge for its own sake or for later application; acquisition of skills.

Cultural needs:

- **Ritual:** media use which frames daily routines, such as getting up, going to work, relaxing after work, accompanying domestic chores.
- **Default:** absorbing media because it is there or because others within the social context are using it.
- **Relaxation:** passive absorption of media, unwinding.
- **Entertainment:** keeping ourselves amused, keeping others amused, having fun.
- **Escapism:** frees the user mentally from the immediate constraints and/or dullness of daily life, enabling him/her to enter into new experiences vicariously.

2. THE GREAT VARIETY OF MAGAZINES MEANS THAT READERS' NEEDS CAN BE MET

This wide range of needs, by subject matter and by Henley-style categories, creates a demand which magazines can meet because there is such a variety of them. And it is a growing variety. The increasing number of consumer magazines not only declares a very healthy market but is also a visible sign of increasing fragmentation. Each subject area tends to be broken down by magazines focusing on more and more specialist areas within it, and thus striking an increasingly personal link with those readers who are especially interested in a given subsector. Judie Lannon vividly described this process at a PPA seminar as "mass marketing becoming mass customisation" [3].

With so many different types of magazine fulfilling

different needs, the Henley Centre made the point that "the fulfilment of these needs is not just a function of the content delivered in the magazine, it can also be a function of the values and associations of the magazine brand and of the physical qualities of the magazine. For example, a glossy woman's monthly delivers much more than content on style and fashion. It may also represent any of the following: an association with the magazine brand, a self indulgent treat, time to oneself, escapism, and so on" [2].

The Henley Centre devised a chart to represent the degree to which each of a dozen categories of magazine satisfied the nine media needs already described:

Content of magazines	Informational needs				Cultural needs				
	Instru-mental	Analysis	Enlight-enment	Selfenh-ancement	Ritual	Default	Relax-ation	Entertai-ment	Escapism
Business	**	***	***	**	*				
Motoring	**	*		*			*		**
Current affairs		**	***	**	*			**	
Ent/listings	***				*				
Erotic			*	*			*	*	***
Food, drink	***			**			*	**	
Hobbies	**			***			***	*	*
Lifestyle, home	*		*	**			***		**
Local interest	***	**	***		*		*		
Sport	**			***			***	**	*
Style & fashion	*	*	**	***			***	**	**
Womens	**	*	*	**	*		***	**	**

Note that no magazines fulfil the 'Default' function. No-one reads a magazine because it is already 'on' - magazines are only read when someone makes a deliberate personal choice.

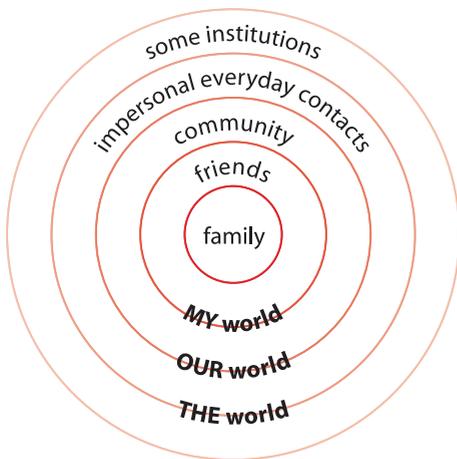
This chart underlines a vital point in a simple way: different kinds of magazine fulfil different needs and therefore work in different ways. The implication is that the readers who choose a given type of magazine find that they develop a relationship with it.

3. FOUR WAYS IN WHICH MAGAZINES DELIVER ENGAGEMENT

A separate study in 2004 by the Henley Centre, 'Planning For Consumer Change' [4] – summarised in PPA's report 'Delivering Engagement' [5] - approached the topic from a different direction. People have become so overloaded with media exposure and information bombardment that it is no longer sufficient for a medium or an advertisement to win consumers' attention: it is necessary to win their active involvement and truly engage them. The Henley Centre concluded that magazines have the characteristics to achieve this engagement in four ways: trust, support, status and participation.

TRUST: A FRIEND AND ADVOCATE

The Henley Centre found that people's trust in traditional external sources of authority continues to wane while cynicism grows. Instead people are increasingly putting their faith in their closest, most immediate networks of family and friends. Trust resides largely in what the Henley Centre termed 'MY world' rather than 'THE world'. Diagrammatically, the closer to the centre of the concentric circles, the higher the degree of trust there is likely to be.

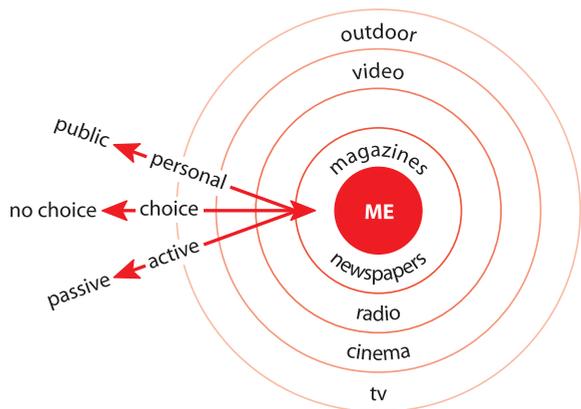


Magazines dovetail well with the concept of 'MY world' because they enjoy many of the same characteristics of a close friend (a point that is further developed later in this report). They also earn a place at the centre of 'MY world' on three key dimensions:

- Personal versus public
- Active versus passive
- Choice versus no choice

On each of these, magazines are at the 'me' end of the

scale: personal, requiring active use, and representing choice. The reader is in control. Favourite magazines become part of the personal networks of trust. Other media are placed further out from the centre, and the more they represent public, passive, choice-less exposure, the further out they are – the more distant from consumers' own world, and the more difficult to attract trust and engagement



SUPPORT: HELP IN MANAGING OUR LIVES

People are increasingly concerned with self-improvement. Just as the Victorians were renowned for their self-help attitudes, so the quest for new skills, expertise and insight has led the Henley Centre to call the growing numbers caught up in this trend the 'new Victorians'. Magazines are well placed to act as mentor and coach, and achieve the depth of engagement that ensues. There are magazines of every type to match the individual's interests and requirements.

Individuals today bounce through their lives in a more varied and complex way than did previous generations. Most people are faced by a greater number of so-called 'life events': changing jobs (repeatedly), moving home, getting divorced, starting an exercise regime, changing from full-time to part-time work, etc. As their life changes and they face new challenges they need sources to turn to for information and advice. Magazines have a significant role here, supporting them and helping them manage.

STATUS: OUR SENSE OF POSITION, BELONGING AND CONFIDENCE

Status rewards us with a sense of position, belonging and confidence. It's not simply how others see us, but also how we see our own selves. Our quest for status is

of fundamental emotional importance. The philosopher Alain de Botton has even written a best-selling book about it, 'Status Anxiety' [6].

The Henley Centre study showed that magazines can be a powerful way for individuals to build, reinforce and boost their status. A particular title can make a public statement about the reader's position in the world, and provide the reader with self-esteem. The choice of magazine says something about the reader. 'You are what you read'. These expressive values can be delivered in a number of ways, such as expertise, exclusivity and badging.

Expertise: making readers feel they are sharing in expertise, specialist knowledge and up-to-date information helps them to sense that they are gaining an edge in personal skills and interests, and that they are equipped for informal networking and gossip.

Exclusivity: magazines can help readers feel they are a bit special and exclusive, elevating them and giving them a cosy warm feeling of clubbiness. Devices such as a letters page, reader offers, clubs, etc help to indicate and reinforce an exclusive positioning and differentiation.

Badging: a magazine makes a statement; it is a designer brand.

PARTICIPATION: A BRIDGE TO INTERACTIVITY

The emergence of the internet, mobile phones, texting and other new digital media has raised consumers' expectations of all the media they use. A new role for magazines is to encourage participation and act as a bridge to interactivity.

The new media have changed our relationship with information and communication. Individuals now have a more ambitious conception of what they can discover

for themselves. If they want to know something, they expect to be able to find it out, and more or less instantly. They feel more in control of information than previously. It's less of a mass-media world than it was, and more of a personalised-media world. This means more involvement and engagement.

For decades publishers have said that no other major medium puts the user in control as much as print does. When reading a magazine or newspaper, the reader can spend as much or as little time as desired in looking at an article or an advertisement. By contrast, when viewing television or listening to radio, it is the broadcaster who is in control of the time spent exposed to each piece of information or entertainment. A 20-second commercial lasts for 20 seconds and no longer. But a print advertisement can be studied for as long as the reader wants, and repeatedly too.

Suddenly the internet has appeared and overtaken print media in this respect. The internet user is even more in control than the magazine or newspaper reader. Whereas the reader can only react to what is printed in the publication, the internet surfer can choose any topic at all and will expect to find something on it.

A viable new function for magazines is to facilitate this democratic development. Magazines can arouse interest in topics, suggest information sources for readers to explore, provide website addresses in articles and advertisements, and so on. The internet is such a wide open, bottomless, uncharted and invisible world that the editing function which magazines can provide – reviewing a topic and suggesting avenues for further exploration – is a very valuable one. Magazines' own websites can be a useful part of such referrals, but in most cases they won't be the main online sources.

Magazines are in an excellent position to do this because of the characteristics of print: the readers are still in control of what they read.

4. THE DRIVERS OF MAGAZINE READING

The “Magazine Reader Experience Study” of 2003 [7, 8] made an ambitious investigation of the emotional and other experiences which drive magazine reading. It was conducted in the USA by the Media Management Center at Northwestern University, and commissioned by Magazine Publishers of America and the American Society of Magazine Editors.

Readers’ experiences and motivations were explored in large-scale qualitative research, and then structured and evaluated in two stages of quantitative research. The result was 220 variables, which were grouped into 39 drivers of magazine reading. The table shows the most powerful 20 of these 39 among all adults.

Scanning down the list, one can see that magazines appeal because they offer value for money, the time spent reading is rewarding, they are liked, and readers feel they make them better informed and smarter. Magazines are relaxing, encourage one to be reflective, and the stories are absorbing. And so on.

The 20 most important motivations that drive reading, in rank order

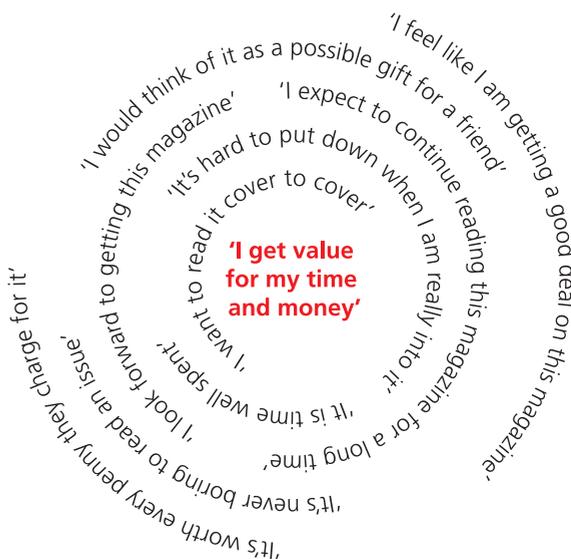
1. I get value for my time and money
2. I like it (i.e. negative correlation with ‘It disappoints me’)
3. It makes me smarter/cleverer
4. It’s my personal timeout
5. I often reflect on it
6. The stories absorb me
7. I learn things first here
8. It’s part of my routine
9. I find the magazine high-quality and sophisticated
10. I trust it
11. I feel good when I read it
12. It’s relevant and useful to me
13. It’s brief and easy for me to read
14. I build relationships by talking about and sharing it
15. I find unique and surprising things
16. It improves me, and helps me try new things
17. I save and refer to it
18. I keep or share articles
19. I think others in the household would enjoy the magazine
20. It’s for people like me

For the full list of the 39 reader experiences, and all the variables making up each experience, visit www.magazine.org

The ranking of the motivations varies by subgroup of the population. For example, among women ‘It’s my

personal timeout’ ranks third, and thus is more important than for men for whom it ranks seventh. ‘I feel good when I read it’ moves up to fifth for women. For men, ‘I learn things first here’ rises to fifth.

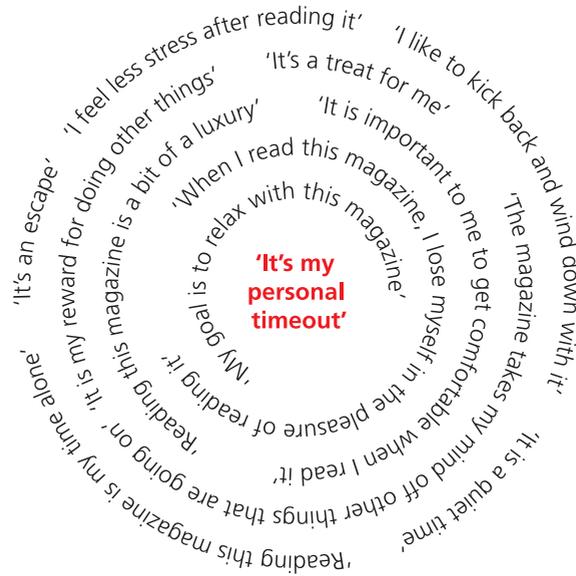
Each of the 39 reader experiences is a constellation of subjective ideas in consumers’ minds. To illustrate, ‘I get value for my time and money’ is made up of these concepts:



It is evident that this ‘reader experience’ or motivation is far richer than the summary label of ‘I get value for my time and money’ suggests. To take another example: ‘It makes me smarter’ is made up of nine variables:



It was noted earlier that the reader experience 'It's my personal timeout' ranks rather higher for women than men. These are the 12 concepts that make up this cluster:



The variety and richness of experiences which motivate consumers to read magazines is impressive. The survey emphasises the depth of engagement which readers feel towards the titles they choose to read.

5. DIFFERENT TYPES OF MAGAZINE WORK IN DIFFERENT WAYS

The important point that different kinds of magazine work in different ways has been brought out by many surveys - among them the "Media Values" survey conducted by RSL-Research Services Ltd and published by IPC Magazines [9].

"Media Values" asked a sample of 1808 adults aged 15-64 whether they agreed or disagreed with a series of statements as applied to each of 26 categories of magazine.

Comparing two of the statements makes the point. One statement was "I read this magazine as a special treat". The magazine categories whose readers agreed most with this statement were:

Young women's monthlies	75% agreed
Fashion beauty & hair monthlies	74%
House & home monthlies	66%
Home & family monthlies	65%
General weeklies	63%
Romantic magazines	62%
Football magazines	61%

A very different ranking emerged for the contrasting statement "I have learned a lot from this magazine":

Gardening	92% agreed
General weeklies	91%
Dieting and slimming	88%
Nature/animals	88%
Men's style magazines	84%
General women's monthlies	82%
Fishing/angling	82%

The first list comprises magazines whose function includes providing material with which one might curl up for a treat, while the second list gives magazines whose function is substantially different - geared more towards information-provision. Only general weeklies appear in both lists. The full range of attitude statements brings home how very different the various categories of magazine are. They are used in different ways, for different purposes. They are very well adapted to their readers' particular needs. The implication can be drawn that a special relationship grows up between people and the magazines they choose to read. Readers become involved with their magazines.

(A)

THE READER RELATIONSHIP

6. THE PERSONAL CHARACTER OF INDIVIDUAL TITLES

There are differences not only between main categories of magazine but also between individual titles within a category. It is the subtle between-title variations of character which make the relationship between the reader and the chosen magazine such a strong personalised bond.

A good illustration of this is the women's weekly magazine sector. To people who do not read any of these magazines they may seem rather similar, but to those who read them there are important distinctions to be made. This was brought out by a qualitative survey called "Editorial Dynamics" conducted by Guidelines Market Research and published by Best magazine [10]. It interviewed regular readers of several of the leading women's weeklies in order to establish the key differences between them, and the editorial strengths of each.

The predominant aspects of the self-image of the regular readers of each title were summed up in this way:

- Magazine A: Readers saw themselves as trustworthy and reliable.
- Magazine B: Caring and feminine.
- Magazine C: Modern, sociable.
- Magazine D: Chatty, "happy with my lot".
- Magazine E: Easy-going, family oriented.

The editorial approach of each weekly was characterised by its regular readers as follows:

- Magazine A: Informative, friendly.
- Magazine B: Caring, true to life.
- Magazine C: Easy to read, young.
- Magazine D: Varied, relaxed.
- Magazine E: Entertaining, familiar.

These are substantial variations in the way the self-selected readers of these weeklies see themselves and their chosen titles. The women are different, they perceive the magazines as different, and accordingly they choose the magazines that closely match their own selves.

In the same way, there are vital distinctions between women's fashion and style monthlies, even though they are often grouped together as though they were similar. Evidence comes from a study carried out by RSGB and published by Vogue titled "Defining the Vogue Reader"

[11], in which 677 in-home interviews were carried out among ABC1 women aged 20-54 who were readers of at least one of five magazines. The characters of the monthlies can best be summarised by the images created by words and phrases which readers associated with each title. The following list gives in rank order those words and phrases cited by 35% or more of readers:

- Magazine F: Good beauty ideas, good fashion ideas, credible, useful advertising, sex & relationships, intelligent.
- Magazine G: Prestigious, glamorous.
- Magazine H: Glamorous, the fashion bible, prestigious, good fashion ideas, trend setting, good beauty ideas.
- Magazine I: Sex & relationships, good beauty ideas, useful advertising, good fashion ideas, credible, trend setting.
- Magazine J: (This magazine had a less well-defined image with no words or phrases being cited by 35% or more of readers. Those cited by more than 30% were good beauty ideas, good fashion ideas, and trend setting.)

While there is a certain degree of overlapping of image there are also many differences. Each magazine has its own unique positioning in the market.

The same is true in all sectors of consumer magazines, and many more examples could be cited.

The more graduated and subtle distinctions between publications are made not so much in terms of the topics covered but the tone of voice they convey. For example, for women's magazines a division at the broadest level is whether their prime orientation is towards others (e.g. family, home, work) or towards 'self' (an informant in one discussion group commented "I want to feel I'm not just somebody's mother, I'm a woman as well"); and in short what kind of emotional world they create. While some people want to live in a brisk world of independent views, others want publications that are less demanding, less aggressive, and more cosy, motherly, friendly, domesticated and conservative. Or the same person at different times may be in different moods, and thus feels like reading a magazine to match the mood. The range of different psychological worlds offered by different magazines means that readers can select ones which are exactly 'me'.

7. CLOSE RELATIONSHIP BETWEEN READERS AND THEIR CHOSEN MAGAZINES

The individuality and personality of each magazine means that readers can readily feel a close relationship with the particular magazines they choose to read. It is very similar to feeling close to a friend, and indeed in qualitative research informants often use phrases such as “reading this is like talking to a friend”. And just as one enjoys one’s own self when in the company of a human friend because that friend reflects and brings out one’s own personality, so it is with a favourite magazine. The magazine reinforces the reader’s identity; the magazine plays back to the reader the values with which he or she identifies.

MAGAZINES AS BRANDS

Magazines are brands. The brand values of the magazine confirm the reader’s perception of herself or himself as a particular kind of person. A brand’s power is that it conjures up a whole range of associations and ideas, which are primarily emotional. (As Robert Jones of Wolff Olins expressed it [12], “brands are a special class of word – they are like a poem all in one word in their ability to evoke and express ideas”.)

The MediaDNA project, conducted during 2001-2004 by Millward Brown for a consortium of sponsors [13], has studied a very large number of media brands, including leading magazines, newspapers, TV channels, TV programmes and radio stations. The survey demonstrated how these brands vary in three aspects: the brand’s positioning; users’ perceptions of its overall character; and its brand personality.

As examples of the findings from the first year’s fieldwork, the five most extrovert media brands were FHM magazine, the three TV programmes Friends, The Simpsons and Uncovered, and Capital FM radio station. FHM was also the most playful brand. The five most reliable brands were Radio Times followed by Sky News, TV Times, Countdown, and Classic FM. The five most glamorous brands were all magazines: Vogue, Elle, Hello!, OK! and Cosmopolitan. Vogue was also the most trend-setting brand. The most practical brand was What’s On TV magazine. The brand with the highest proportion of users who say they can lose themselves in it was Take A Break. This magazine was also the brand seen as caring most for its users.

What these and many other examples are saying is that magazines have distinct individual personality profiles which readers recognise, and it is evident that people tend to match a publication’s personality to their own personality.

The sponsors of MediaDNA also drew the conclusion that the strength of media brands means that it is vital to take account of brand values when planning media advertising schedules, rather than treating publications and programmes as commodities.

SELECTING A MAGAZINE THAT EXPRESSES ONE’S OWN SELF

A reader can feel that one magazine is spot on while another magazine, superficially similar, is not quite right, is not quite ‘me’.

One of many surveys to demonstrate this was a qualitative study by The Research Business for the National Magazine Company [14]. Readers of eight of the National Magazine Company’s titles were interviewed in group discussions and individual depth interviews. 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 expressed by one advertising agency in the following words: “the most impressive lesson emerging from current research is that readers enjoy a very close relationship with magazines that they chose to read. It is a relationship that is impossible for other media to replicate” [15].

EXAMPLES OF CLOSE RELATIONSHIPS

Any in-depth survey of a single magazine or a small group of magazines will reveal the nature of the individuality of each title. Many examples could be cited.

Vanity Fair serves as an illustration of a single title. Its publisher Conde Nast felt that it was a difficult magazine for advertisers and agencies to decipher, because unless you actually read the magazine you can’t form an accurate idea of what type of person reads it.

Vanity Fair was often being pigeonholed as a glossy women's magazine in the same category as Tatler or Harpers & Queen, whereas in reality it is substantially different. The research agency Navigator was commissioned to carry out some qualitative research among subscribers to investigate this [16].

Navigator found that Vanity Fair's marked American flavour is an important part of the magazine's appeal to its subscribers, who have an international outlook and feel part of that wider community. The magazine is investigative journalism. The intensity of the writing has more in common with The Economist than with most women's magazines. It is a magazine for both sexes and emphatically not a women's magazine. There is an unusual emphasis on text and less on visuals than most magazines. The depth of the long articles is appreciated. There is a sense that there's a minimum viable period of time for reading it; a short snatched session is not adequate. The front covers are strong, unpredictable and a talking point. The subscribers believe that no other magazine could adequately be a substitute for Vanity Fair.

Thus the positioning is unique, and the relationship between subscriber and magazine is close and mutually demanding. The magazine asks for time and commitment from the reader, and the reader expects a return of stimulation and quality journalism.

A magazine, or a category of magazine, displaying a particularly strong attitude, will not only attract those people who share that attitude but will also tend to shut out people who do not share that attitude. Vanity Fair, for example, exhibits a marked international outlook, and anyone without such an outlook is unlikely to find the magazine strongly appealing. The knowledge of this contributes to the feeling among readers of 'ownership', intimacy and belonging, like membership of an exclusive club.

A good example of this applying to a whole group of magazines occurs in the youth market. Most **youth magazines** are not only to be read by teenagers, but they are also most definitely not to be read by parents!

EMAP's "Youth Facts 4" survey, conducted by Millward Brown [17], emphasised that the reading of youth magazines by 11-19 year olds is a highly personal experience. 60% of teenage magazines are read when the teenager is on his or her own, and 46% of magazines are read in the sanctuary of the bedroom. However the company in which a teen magazine is read depends to some extent on its subject matter. Computer and football magazines, and social parts of girls

magazines such as horoscopes and gossip pages, are happily shared with friends. But problem pages, and 'real-life stories' which might cause a tear or two, are likely to be savoured in private.

For EMAP's "Youth Facts 5" study [18] The Psychology Business carried out a deeper psychological analysis of the relationship young people in the 11-18 range have with brands and media. Compared with television, radio and cinema, magazines are particularly strong in terms of involvement and relevance. Relevance is directly linked with the individual's identity and that of the group to which he/she belongs, and the choice of magazines available means that a teenager can filter through to those titles which are currently the most relevant, involving and persuasive. In turn, the sequence of chosen magazines can help define the reader's own identity and progress, during this evolving period when a person moves from the group identity which typically dominates as an 11-12 year old to the fully individual identity which has established itself by the age of 17-18.

Authorities in public service recognise the role of teen magazines. The chairman of the Teenage Magazine Arbitration Panel, Dr Fleur Fisher, said in 2004 [19] "Research suggests that teenagers are very aware of British society's prevailing sexual attitudes. Most teenagers would like their parents to be more willing to discuss this aspect of growing up, but mutual embarrassment is reported as a major hindrance. Likewise sex education in schools was judged to be inadequate, focusing on biology and ignoring their concerns about sexual behaviour, sexually transmitted diseases, and relationships. But teen magazines are trusted by teenagers, they talk with them rather than sermonise at them. Teenagers like getting non-judgemental anonymous advice as they struggle with the demands of growing up. They seem to find teenage magazines' light-hearted and fun tone, allied with accurate information, a cheering beacon in the murky adult world of mixed messages." The Minister for Children, Young People & Families, Margaret Hodge, said "Teenage magazines are seen as the best friend of young people through the roller coaster years of their lives."

For **television weeklies** their strong relationship with their readers is based partly on their highly practical function. This was probed in a study for IPC tx by NOP Solutions in November 2000 [20], which put an array of agree/disagree statements to a panel of regular readers of television weeklies. 88% agreed with the statement that "With so many TV channels nowadays, it helps to plan your viewing". To do this, they turned to their TV weeklies. 95% said their TV weekly helps them to plan their viewing. A similar percentage felt their TV

magazine helps them keep in touch with what's going on. The magazine is used regularly right through the week (95% agreed), it is picked up time and time again (86% agreed), and is read cover to cover (85% agreed). Most readers (78%) go through their TV magazine carefully and pick out what to watch, and many (61%) highlight things they're interested in and refer back to them later.

All the family use the weekly TV magazine, so it's always around (80% agreed). Most readers like to have celebrity and showbiz news as well as the programmes (68% agreed), and they like reading about the soaps and their stars (62% agreed).

These figures describe a thorough and deep involvement with television weeklies, resting in part on the practical function but also from an absorption with the other content besides the programme listings.

This contrasts sharply with the attitudes towards the newspaper TV supplements. 87% agreed that "I prefer these weekly TV magazines to the newspaper listing supplements you get nowadays". This is partly because "You value these weekly TV magazines more than the newspaper listings supplements because you've chosen to buy them" (82% agreed). Consequently "The newspaper listings supplement gets thrown out with the paper whereas my TV magazine is used all week" (75% agreed).

The love of magazines begins at an early age. A survey of **magazines for children** aged 2-11, by Diagnostics for PPA [21], found that magazines are read and re-read by children to the extent that they are often almost known by heart. This is a personal relationship par excellence. When the children have finished 'devouring' them the magazines are often placed on an ever-growing pile and become part of a prized collection.

Other examples of close relationships are presented on www.hmaw.net – including county magazines and the psychological values they carry.

A RARE THING - A WEAK READER/MAGAZINE RELATIONSHIP: NEWSPAPER COLOUR SUPPLEMENTS AND SECTIONS

One can learn something more about the reader/magazine personal relationship by examining a rare case where it is not a strong factor. In National Magazine Company/ G+J's "Women & Magazines: The Medium & The Message" by SRG [22] one of the publication types examined was newspaper colour supplements in magazine format. The relationship

between reader and supplement was a weak one. Why? One major reason is that a supplement is a by-product, not an active acquisition. To illustrate:

"You buy the newspaper and the supplement just happens to fall out. You don't buy the newspaper in order to get that."

"I think the difference is that the [paid-for] magazine is actually yours by choice, isn't it? You actually pick what you feel suits you. Whereas a supplement is just something that happens. It's a benefit that comes with the paper but it's not yours by choice."

In addition the supplement is sometimes read by default because it is the only section left, when other family members have grabbed the newspaper sections - and this further distances reader and supplement.

There were other reasons found by the survey. Large sections of the supplements are regarded as irrelevant and uninteresting. There is a greater degree of perceived similarity between supplements, which sometimes leads to the view that they are interchangeable. They lack individuality. They have a negative image of being 'throw-away gossip'. For women, the advertising is sometimes seen as largely irrelevant to women's concerns.

The weak reader/supplement relationship is reflected in the behaviour towards the supplements, which tend to be read very selectively, flicked through, picked up only once, and disposed of quickly.

The survey's findings were endorsed by SouthBank Publishing's study "The Quality Medium, The Quality Message" conducted by Mulholland Research Associates [23]. It confirmed women's lack of involvement in supplements. Three verbatims from the study were:

"I literally just open them up and flick through them. I don't treat them in the same way as I would a magazine."

"Many times it's not been read at all. It's something extra, it's not the reason I buy the Sunday paper."

"I flick through them, because usually I get halfway through it and my husband says 'Do you want to swap?' so I tend to flick through it."

Further evidence came from a study called "A Comparison of Magazines and Newspaper Review

Sections”, commissioned jointly by Ogilvy & Mather Media/The Network and National Magazine Company [24]. Robert Quayle conducted eight group discussions among men and women who read both a weekend broadsheet newspaper and a paid-for magazine. He found that newspaper sections are approached, read and perceived differently from paid-for magazines. Sections have no individual personality and are not a brand in their own right, while magazines have a clear, distinct, focused personality and carry strong brand values. Sections are not perceived as aimed specifically ‘for me’; magazines are. There is a low expectation of finding something of personal relevance in a section, but a high expectation in magazines. Sections are skimmed to find something of interest, whereas magazines are skimmed to decide what to read first and what to go back to later. With sections, readers expect general, impersonal information, and the relationship is unemotional, detached and relatively weak. With magazines, readers expect information that is personally relevant and involving, including ideas on what to buy and do, and the relationship is stronger and more emotional. Advertisements are felt to be merely incidental to sections but integral to magazines; readers spontaneously mention advertising as part of the appeal of their magazines. With sections, advertising is not seen as relevant to the editorial content, therefore ads have to work independently of the medium, and there is no perceived editorial endorsement of the ads. With magazines, the ads are expected to be relevant and there is a synergy between the editorial content and the ads; the ads gain from the brand values of the magazine, and they are seen to be endorsed by the magazine.

Through such contrasts we see some of the strengths of the stand-alone paid-for magazines: they are actively and deliberately chosen, they are wanted for their own sake, all the contents are likely to be of interest because they reflect the magazine’s personality (i.e. the reader’s personality), they have individuality, and the advertising is relevant and consumed with interest.

EVOLUTION: KEEPING THE RELATIONSHIP FRESH

Magazines are different products from one issue to the next, not only because every article is unique to a single issue but also because an issue often contains new elements, such as a new column, a rearrangement of features, a redesigned masthead/cover/contents page, and so on.

Magazines evolve, but it is not pure Darwin. Darwin’s agent for change was natural selection. In the case of magazines there are two agents of change working in combination. One might be called ‘reader selection’, the other ‘editor selection’.

‘Reader selection’ means the cumulative effect of the innumerable choices made by readers [25]. Readers choose such things as:

- interests about which one wishes to read
- a repertoire of publications to serve each interest
- particular issues of particular publications within that repertoire
- the moment at which to read, when the mood is right for absorbing a specific publication
- particular items to read when looking through or screening the contents
- how long to dwell on each item, a choice made possible because the reader has control over timing

This stream of choices leads over time to movements in sales and readership, to which publishers and editors attempt to respond. The editors’ efforts to modify their magazines in order to keep them at the forefront of readers’ preferences are what might be called ‘editor selection’.

Central to maintaining the close relationship between readers and their chosen magazines is the editors’ ability to keep the product fresh, so that the readers and what they are offered remain in step. “Good magazines are edited by their readers” as Pat Roberts Cairns, editor of *House Beautiful*, expressed it [26]. Provided this harmony is sustained, the relationship can deepen through time.

The challenges from new magazines, and from new initiatives by existing magazines, keeps all editors on their toes, and this competitive situation ensures that readers have a supply of the most relevant and stimulating magazines possible.

8. THE 'MAGAZINE MOMENT'

The "Absorbing Media" survey, published in 2002 by PPA and conducted by NFO WorldGroup [27, 28], called the experience of reading magazines the 'magazine moment'.

NFO wrote "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 DIY 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 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 did '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."

Magazines are consumed at a more personal moment of one's time than are other media. The reading experience is enjoyed both for its relaxing nature and for its active input – dipping in, conscious scanning of each page, re-reading – and is thus felt to be more engaging and of more merit than watching television and easier than using the internet. Magazines are consumed and absorbed in an order and at a pace which suits the individual.

Respondents remarked how magazines can be taken where and when the reader wishes, are easy to pick up and put down, and are available when there's time for reading. NFO commented that the real meaning of this portability of magazines "was that the magazine really can be a friend, always to hand but never demanding, just like a good friend should be".

Another aspect of the physicality of magazines is their tactile quality: some readers "really liked the feel of the magazine, and their response – both verbal and non-verbal – suggested a warm, comfortable moment."

Sometimes the magazine moment is something to be shared rather than kept private. For instance two respondents said:

"I'll bring it in to work, and say in Bliss or Sugar they've got questionnaires, you do your little questionnairey things with people and rate them, and call out each others' stars."

"I find with magazines if I've found something good in it or something funny in it, I'd have it in my bag and I'd say 'Oh just look at this'."

A

THE READER RELATIONSHIP

9. MATCHING THE MAGAZINE TO THE MOOD

THE READER'S REPERTOIRE OF MAGAZINES

For each active area of interest, readers have one or more magazines which they choose to buy, or choose to accept as a pass-on reader of someone else's copy. Thus a repertoire of magazines builds up.

One's repertoire is not fixed permanently. It can change, with something new being tried if it looks as though it might appeal, or something being dropped from the repertoire if it ceases to give satisfaction. The cause of a change might be the appearance of a new title, modifications to an existing title, or a change in the reader and the reader's circumstances and requirements. A person's repertoire moves in step with his or her personal, social and psychological development, so that at any one stage comparisons are made over only a narrow band of the whole magazine spectrum. Obviously enough, magazine choice is likely to be modified as one moves through the life stages of childhood, adolescence, early working years, early years of marriage or living together, the years of young children, older children, the empty-nest years after the children have left home, and finally the years of old age. Again, within a much narrower time-span there are other changes that affect one's repertoire of magazines, even if only temporarily, such as moving house, redecorating, or thinking of changing the car.

A study from G+J called "Perspectives of a Woman's Monthly Magazine" conducted by BMRB [29] concluded that "a magazine is immensely versatile. The way it speaks to readers and the way readers interpret the magazine is unique in every case... Each woman has a repertoire of magazines and she has a different relationship with each title... to meet her different needs and moods."

This highlights one of the values of the repertoire - there is scope to choose the magazine that matches the mood of the moment.

SELECTING FROM THE REPERTOIRE TO MATCH THE MOOD

Selecting a magazine to suit the mood ensures that the issue is read in an appropriate frame of mind. Both the editorial and the advertisements can be absorbed while the reader is in a relevant receptive mood, and thus they have the maximum opportunity to make an impact.

A number of qualitative research studies have indicated that one basic divide in mood is between difficult/serious/heavy reading matter, representing effort and work, and easy/light/fun reading,

representing relaxation or escapism. One instance is a study by Plastow Research for International Thomson Publishing [30] among readers of general interest magazines. Readers distinguished between magazines according to the amount of concentration required to read them. Some, such as *The Economist*, *Time* and *The Spectator*, were seen to call for a fair degree of concentration and were read in a decidedly sterner mood than many other journals. A different group of magazines was seen as a means of escape or relaxation, hence a comment like "I read *Country Life* sometimes when I feel depressed and need to look at nice houses". A project by Behavioural Studies Ltd [30] identified two main types of reading mood:

- 'Feet up': Reading on a settee, in the bath or in bed, sometimes literally with one's feet up. The reader is relaxed, and not conscious of time. What is prized is the experience of being taken out of oneself.
- 'Practical': Reading with the intention of learning something from the publication. This is not necessarily deliberate information seeking; it also embraces a general feeling that one may pick up some useful ideas.

A qualitative study by Communication Research Ltd for a women's monthly [30] also drew this distinction between escapist and practical reading. CRL reported "Once the magazine has been purchased there is additional pleasure to be gained from choosing the right time and place to read it". Four informants said of the monthly glossies:

"I like to read them in the evening, when there's no-one else around. They are connected with the sort of total relaxation you can only get during the evening."

"There's lots to read so I'll go to bed early, have a bath and make sure I've got time to myself."

"I enjoy choosing it, picking through the magazines. Then I read it when I'm in bed at night or lying on the settee."

"I need time to sit and read and enjoy them. I don't want home and work around me all the time."

CRL found that when she's seeing herself in her domestic role it's the practical magazines that a woman is likely to select to read. Informants often commented about associating these magazines with having a break from work around the house. One of CRL's informants said

"If you're feeling 'housey' you'd go for one magazine and if you're feeling 'dreamy' you'd go for another."

Another dimension affecting the way people choose their reading is the time available and a person's current attitude towards that time. The Henley Centre reported [31] that media and their messages are consumed in different ways according to the person's 'time mode'. One category is 'saving time' mode, in which consumers 'streamline'. They want simple, fast and convenient information. The other category is 'investing time' mode, when consumers need something more complex. They seek relevance, involvement, and added-value information, looking for messages that hold their attention, engage them, and reward them for their investment of time. Magazines are a perfect medium for both 'investing time' and 'saving time' modes. Because readers control their own exposure, they can approach their reading in either manner.

SouthBank Publishing's study "The Quality Medium, The Quality Message" [23] by Mulholland Research Associates, showed that women will sometimes try to save reading their favourite monthly magazines until they have no other pressures on them. "This may be in the bath or in bed or at some other time of relaxation, but the important thing is that they absorb themselves with their magazine giving it their undivided attention." The magazines gain from being part of a private treat. The reader of an upmarket glossy said:

"I've got two hours that I absolutely cherish - and that's my treat, a nice cup of coffee, quietly taking my time, going through it."

The very experience of becoming immersed in a publication can further mould the mood of a reader. A simple illustration is one woman's remark in a group discussion [30] that "I come out of reading Cosmopolitan feeling a different person than when I come out of reading Prima".

This was closely echoed in the qualitative stage of the "Absorbing Media" research, conducted by NFO Worldwide for PPA and published in 2002 [27]. Talking about women's glossy monthlies, NFO wrote "The titles were more than simply magazines – they were brands. By reading one of these specific brands, readers would be willingly engaging with its essence, becoming a Cosmo or Vogue person during the time that they were engaging with it... It was as if magazines played an inherent part in people's psyche."

The study "Women & Magazines: The Medium & the Message" [22] spoke about this in more detail. Not only does a person's existing mood affect what magazine is picked up, but also the reader's relationship with the magazine will affect the mental mode of reading, and the mood engendered by the magazine. This in turn has an impact on the value and salience attached to a magazine's contents, including the advertisements. The mental mode and the consequent reading behaviour varies by type of magazine; as far as women's magazines and newspaper colour supplements are concerned, the variations were described in the report as follows:

"**Style monthlies** are read with intent to absorb the style contained in the visual images. The mental mode is acquisitive, dreamy and unfocused.

"**Feature monthlies** provide an in-depth read which educates and informs as well as entertains. The mental mode is one of deep concentration and involvement, producing a highly 'active' read.

"**Domestic monthlies** are similar to Feature Monthlies in the intensity of the read. However the different contents results in differing mental modes from emotional to rational and practical.

"**Multi-dimensional weeklies** are chiefly read for practical support, producing a highly 'active' read because of the perceived usefulness of the content.

"**Traditional weeklies** in contrast provide more domestic and emotional support than practical aid.

"**Colour supplements** are very different in role and this is reflected in both the physical and mental nature of the read. They are read very selectively and passively with little intention of using the information contained. They are consequently read for a short time and retained for only a short time."

SELECTING WITHIN AN INDIVIDUAL MAGAZINE TO MATCH THE MOOD

In matching their mood to their choice of what to read, people can of course select not only a specific magazine but also the kinds of item within a given magazine. As Redwood expressed it [31], "Depending on mood, need and context, we take from a magazine what we want, when we want it – whether it is ideas, information, advice, inspiration, escapism or relaxation. Our relationship with our favourite magazines will be one in which we feel emotionally engaged and intellectually challenged, but always on our own terms."

10. THE PHYSICAL ASPECTS OF HANDLING MAGAZINES

HOW COPIES ARE OBTAINED

A magazine's life often extends beyond the original buyer or buying household. Highly complex and organised networks of further readers can exist, often involving the exchange of magazines on a regular basis. The variety of ways in which people obtain their magazines is measured by the "National Readership Survey" [32], and also by the "Quality of Reading Survey" (QRS) published in 2000 by IPA, ISBA & PPA, and conducted by Ipsos-RSL [33]. Naturally, different kinds of magazine, and in some cases individual titles, tend to be acquired in different ways. There may be a high proportion of copies delivered to the home, or being bought at newsagents, or being passed on from another household, or being read outside the home. As examples, here are profiles for three categories of magazine:

	5 television weeklies %	5 country interests magazines %	3 retirement monthlies %
Bought it myself	58	36	18
Delivered to my home by newsagent	8	3	10
Postal subscription to my home	1	4	43
Someone else in my household bought it	21	5	3
Passed on/lent from another household	3	16	15
Office/work copy	1	5	1
Only saw it outside my home/office	7	29	3
Other	1	2	8
Total	100	100	100

Source: QRS

As the table indicates, television weeklies have a very high proportion of readers whose copy is bought by themselves or another household member or is delivered to the home. By contrast, readers of the country interests magazines have a significant proportion of copies obtained from another household, and more than a quarter of copies are read only outside the home or office. The readers of retirement magazines have a large proportion of copies through postal subscription.

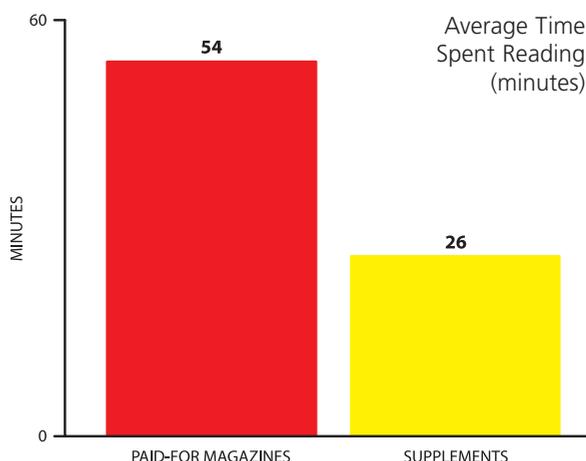
How to interpret such profiles is a debatable matter. It would be an over-simplification to say that people who

buy a magazine for themselves or a member of their household necessarily read it more intensely than people who see their copy in other ways. The National Magazines/G+J survey "Women & Magazines: The Medium and the Message" [22] had something to say on this. "Purchase is not essential to the formation of a strong reader/magazine relationship. If reader identification with the brand's values is strong then a close relationship with the magazine will develop. When secondary and tertiary readers receive a magazine on a regular basis, the reader affiliation and commitment to the brand is often as strong as the purchaser's."

WCRS commented that pass-on readers "are not of drastically less value" to advertisers than primary readers. Pass-on readership "is real, 'involved' readership and largely not the reading of out-of-date copies in hairdressers of media department mythology" [15].

TIME SPENT READING

Magazines are thoroughly read and a lot of time is spent reading them. The 2000 "Quality of Reading Survey" [33] found that for the average paid-for magazine 54 minutes were spent reading a typical issue. For some categories of magazine (particularly specialist publications) the average was appreciably higher - up to 74 minutes - while the lowest reading time for a paid-for magazine category was 34 minutes. The newspaper supplements/sections averaged only 26 minutes of reading time, less than half the average for paid-for titles. A complete listing of adults' time spent reading by category of magazine is given in the table which follows. As always, the variations by type of magazine are a reminder that different kinds of magazine work in different ways, as is appropriate to the subject matter and method of distribution.



PROPORTION OF ISSUE READ

Another way of looking at thoroughness of reading is to measure the proportion of the magazine that is normally read by the time the reader has finished with it.

Once again the "Quality of Reading Survey" (QRS) provides the most recent information across a representative range of magazine categories. QRS found that the typical reader of a paid-for magazine had opened

78% of the pages by the time he or she had finished with the issue. The proportion of readers who had opened at least 50% of pages averaged 83%, while 44% of readers had opened every single page in a typical issue.

A breakdown by type of magazine is given in the table opposite. One of the striking things is the consistency of the high figures, with no paid-for segment (except for the classified advertising titles) scoring less than 70% of pages opened by the average reader.

Average time spent reading, and proportion of pages opened - Adults

	Time spent reading	Proportion of pages opened
All paid-for magazines	54	78
Science & nature	74	77
General interest miscellaneous	69	73
Gardening	68	80
Motorcycling	68	80
Motoring - classic cars	65	78
Retirement	64	87
Golf	63	79
Current affairs & finance	60	73
Bridal	60	77
Angling	59	79
Homes & decoration	57	79
Motoring - performance cars	57	77
Women's general monthlies	56	80
Women's weeklies	55	83
Men's & style magazines	54	78
Parenting	53	71
Music	52	80
TV weeklies	50	82
Adult humour	50	82
Motoring - general	50	73
Country interests	49	76
Buying & selling (classified advertising)	48	64
Young women's magazines	47	81
Women's lifestyle	47	75
Slimming	43	73
Football	39	73
Women's health & beauty	37	75
Film, entertainment and listings	37	77
Teenage	34	72
Customer magazines:		
TV listings	44	69
Motoring & travel	25	73
Women's	23	75
Newspaper supplements/sections	26	80

Source: QRS 2000

(A)

THE READER RELATIONSHIP

Even these impressive figures are an under-estimation of the true exposure achieved by the pages of a magazine. In answering a question about the pages they had read or opened, informants are often interpreting this as including only those pages on which a significant proportion of the text was read, word for word; they are likely to be excluding items glanced at and passed over without a detailed read. Thus the real traffic through the pages is very high indeed. This has been confirmed by a number of studies, of which the classic piece of research was the "Reader Categorisation Study" [34] carried out for JICNARS (National Readership Survey) by Research Services Ltd.

This study included a page traffic check in which respondents were shown copies of magazines they had recently completed reading. They were taken through the copies page by page and asked to say for each page whether they "saw and **read something** on" the page, "saw but just **glanced at**" it, or "**didn't see** at all".

The result was an average spread traffic score of 93% for general and women's weeklies and 92% for general and women's monthlies. The average page traffic score was virtually as high:

	Weeklies	Monthlies
	%	%
Spread traffic	93	92
Page traffic	91	90
Reading traffic	51	44

Definitions:

Page traffic: proportion of pages claimed as either "read something on" or "just glanced at".

Spread traffic: proportion of spreads where either or both facing pages were claimed as above.

Reading traffic: proportion of pages claimed as "read something" on it.

Thus nine or more pages and spreads out of every ten are looked at.

This is the true measure of the exposure to the advertising which the magazine medium provides. Once the magazine has delivered the reader's eyes open in

front of the page it is largely up to the creative treatment of the advertisement, and the interest of the product, to convert that opportunity into an examination of the advertisement.

The third type of score in the table above is 'reading traffic' - the proportion of pages on which something was actively read (as distinct from just glanced at). Around half of all pages are read in this more demanding sense.

SIMILAR PATTERNS IN OTHER COUNTRIES

Surveys in many other countries have shown similar patterns: people spend substantial time reading their magazines, the copies are read thoroughly, and they also tend to be read repeatedly, so that the average page (and thus the average advertisement) is exposed more than once.

A recent example of such surveys is "Don't Talk To Strangers – the Quality of Magazine Reading Survey", published in 2002 by Magazine Publishers of Australia and conducted by Roy Morgan Research [35]. It found that primary readers of magazines (i.e. subscribers or purchasers) averaged 5.5 reading occasions of the average issue of a weekly magazine, and 7.3 reading occasions of an average monthly – though newspaper magazine supplements only achieved 2.9 occasions. Among pass-on readers, weekly magazines averaged 3.0 reading occasions, monthlies averaged 2.6 and newspaper supplements averaged 2.3.

Together with data on time spent reading, proportion of pages opened, and a range of other questions on qualitative aspects of reading, the MPA was able to build up a picture of how magazines are used. The paid-for magazines achieve a high intensity of reading: impressive levels of multiple reading occasions and time spent, resulting in thorough reading. Paid-for magazines are more inspirational than newspaper supplements or other media. There is a strong interaction and bond between readers and their magazines. Readers view their favourite publications as friends; when they are reading their magazines both the editorial and advertising content they are not talking to strangers.

11. REPEAT READING

Magazines are not just read once; frequently they are read on several occasions, and many pages (including advertisements) are looked at repeatedly. This reflects one of the benefits of print media over television and radio - the readers' ability to control the timing of their exposure. The desire to re-visit a magazine is an expression of the relationship between reader and magazine.

In picking up a magazine several times, each reading may well cover only part of the total pages (except perhaps the first reading), but by the time the reader has finished with the issue virtually all of the pages will have been seen, some of them a number of times.

The pattern of repeat reading is most easily observed through a diary panel. IPC's "Media Values" research included a diary panel of 250 adults [36] recruited from the main Media Values survey. Panel members kept a diary of their magazine reading for two weeks. There were numerous instances of separate reading occasions during the course of a single day. Examples are:

Woman aged 34, on a Monday: reading of TV Times
11am 15 minutes, in living room, no other activity.
6pm 10 minutes, in kitchen, no other activity.
9pm 15 minutes, in living room, while watching TV.

She had read TV Times for a total of 40 minutes that day, in three separate sessions. In addition she read Bella for 20 minutes this Monday.

Man aged 32, on a Sunday: reading of Arena
10am 15 minutes, in lounge, no other activity.
Noon 15 minutes, in lounge, while listening to radio.

Man aged 28, on a Thursday: reading of Shoot
9am 30 minutes, in lounge, while listening to radio.
Noon 10 minutes, in lounge, while eating.
4pm 10 minutes, in lounge, no other activity.
8pm 15 minutes, in lounge, while watching TV.

This totalled 65 minutes on one day.

This enables us to see examples of people reading a magazine on two, three or four separate occasions within a single day, adding up to anything from 30 minutes to more than an hour. In addition these issues may have been read on other days.

In order to look at the incidence of repeat reading of the same issues on **different** days I turned to an earlier diary panel and examined individual panel members' records through time. This was an experimental panel

commissioned in 1984 by JICNARS [37], and run as three separate sub-panels by three different research companies (Communications Research Ltd, Research Bureau Ltd, and AGB Cable & Viewdata). The panel ran for about four weeks during October and November 1984.

There were countless instances of reading an issue of a magazine on more than one day. A few examples will be illuminating. The accompanying table shows extracts from the diaries of four panel members.

Mrs F is typical in having a number of instances of reading a magazine over two or more days. The 3rd November issue of Woman's Weekly was someone else's copy; Mrs F began reading it for the first time on 16th November when it was nearly three weeks old. She read it in her own home. Next day she read the same issue again, at home. She also read the 10th November issue of Woman's Weekly on those two days. It looks as though a friend or relative gave both issues to her on the same day, and she was reading them in parallel. On 19th November Mrs F began reading the new issue of Woman, cover-dated 25th November. It was her own copy, she read it at home, and she read it again next day.

Mrs W read the new copy of Family Circle on two consecutive days, 26th and 27th October, then after a gap of two weeks she read it again, and five days later read it on the fourth different day. It was her own copy and she read it at home each time.

Mr G read the household copy of Radio Times every day for seven consecutive days. He did the same with TV Times. Every week there was this same pattern of reading both magazines each day - obviously for planning his daily viewing.

Mr E was an enthusiast of Reader's Digest. He read the October issue on 21st October; it was not the first time he'd read that issue, so he had evidently started reading it before he began keeping his diary that day. He also read that issue on four other days over the next two weeks. It was a household copy of the magazine, and each time it was read at home. He acquired the November issue and read it for the first time on 8th November, at home. He then read it on seven of the next nine days.

And so it goes on. The diaries are filled with instance after instance of magazine issues being read on more than one day, sometimes two or three weeks apart, besides other issues being read on one day only.

Person	Magazine	Date on cover	Date this issue read	First time?	Whose copy	Where read
Mrs F	Woman's Weekly	3 Nov 84	16 Nov	Y	S	H
			17 Nov	N	S	H
	Woman's Weekly	10 Nov 84	16 Nov	Y	S	H
			17 Nov	N	S	H
	Woman	25 Nov 84	19 Nov	Y	O	H
			20 Nov	N	O	H
Mrs W	Family Circle	31 Oct 84	26 Oct	Y	O	H
			27 Oct	N	O	H
			12 Nov	N	O	H
			17 Nov	N	O	H
				N	O	H
Mr G	Radio Times	17 Nov 84	17 Nov	Y	F	H
			18 Nov	N	F	H
			19 Nov	N	F	H
			20 Nov	N	F	H
			21 Nov	N	F	H
			22 Nov	N	F	H
			23 Nov	N	F	H
				N	F	H
Mr E	Reader's Digest	Oct 84	21 Oct	N	F	H
			23 Oct	N	F	H
			29 Oct	N	F	H
			3 Nov	N	F	H
			5 Nov	N	F	H
				N	F	H
	Reader's Digest	Nov 84	8 Nov	Y	F	H
			9 Nov	N	F	H
			10 Nov	N	F	H
			11 Nov	N	F	H
			12 Nov	N	F	H
			15 Nov	N	F	H
			16 Nov	N	F	H
			17 Nov	N	F	H

Key: First time (i.e. is this the first time of reading this issue?): Y=Yes, N=No.
 Whose copy: O=Own, F=Family/household copy, S= Someone else's.
 Where read: H=Own home, S=Somewhere else.

The diary did not attempt to measure the number of pick-ups within a single day. However the 2000 "Quality of Reading Survey" [33] measured the average number of pick-ups, which reflect both the pick-ups within a single day and the different days on which an issue was

read. The question asked "How many times do you usually pick up an issue of by the time you've finished with it?" The resulting averages are shown below for a small selection of the magazine categories:

	Average number of times picked-up Adults
All paid-for magazines	5.4
TV listings weeklies	10.0
Motorcycling	6.7
Homes & decoration	5.8
Men's & style monthlies	5.7
General motoring magazines	4.9
Women's general monthlies	4.9
Football magazines	4.1
Teenage	3.6

The average copy of a paid-for magazine is picked up 5.4 times by adults. TV listings weeklies understandably have the highest number of pick-ups because of their reference use, but among the 31 categories of paid-for magazines even the lowest-scoring category achieves 3.6 pick-ups of a typical copy.

It is clear that repeat reading of magazines is a major benefit for advertisers, yet it is one that is not reflected in the National Readership Survey figures.

PAGE EXPOSURES (PEX)

The previous section has shown that magazine issues are often read on more than one day, that they may be picked up and read more than once within a day, and that more than one issue may be read on a single day. It is also true that not all of the issue is necessarily read on a day when it is picked up.

These factors were combined into a single score - PEX (Page EXposures) - in the 2000 "Quality of Reading Survey" (QRS) [33]. PEX measures of the number of times the average page in a magazine is read or looked at by the average reader. In effect, this means the average number of times a reader will see a typical **advertisement**.

PEX was introduced because the National Readership Survey treats all magazines as offering equal advertisement exposure, even though this does not reflect reality, and because magazines offer more impacts than the average issue readership figures allow, as the previous section has indicated. With magazines these extra impacts are free, unlike the broadcast media where every transmission costs extra.

The concept behind PEX is simple. First, establish the average number of different days on which a magazine is read (within its publishing interval), and also the average proportion of pages opened on a typical day when it is read. Then multiply the two together to obtain the total proportion of pages opened - which converts to the number of times an average page is looked at.

For example, suppose that in a typical week a given weekly magazine is read on three different days, as an average across all readers; and that on a day when the magazine is read an average of 60% of the pages are opened. It is easy to see that during the whole week 3 x 60% of the pages are opened, i.e. 180%. This means an average of 1.8 times per page.

In practice the questions which measure PEX ask about the number of reading days in the **last** week/month/etc, rather than the **average** week/month/etc; and the proportion of pages opened on the **last** day rather than the **average** day. This is because it is easier for respondents to answer in terms of a particular recent occasion than to estimate an average over a longer period. But it can be demonstrated from QRS data that the average derived from a large number of people reporting on the **last** occasion produces the same result as the average derived from the same people reporting on their individual **average** behaviour. PEX also uses an additional question to take account of people sometimes reading more than one issue on the same day.

Thus the three questions that make up the PEX score ask:

- The number of different **days** on which any issues of a named magazine were read or looked at, within the publishing interval (e.g. 7 days for a weekly)
- The number of separate **issues** read or looked at on the last day on which any issues were read
- The proportion of **pages** opened on the last day on which an issue was read (the proportion of the last issue read if two or more issues were read that day)

The PEX scores are calculated by multiplying the three answers together.

The average PEX score across all the paid-for magazines covered by QRS was 2.54. In other words, the average magazine page is looked at 2.54 times, a great benefit for advertisers. For national newspaper sections and supplements the average PEX score was 1.28. There were considerable variations by publication categories, as the ranking of the scores on the next page indicates.

No. of times the average page in a magazine is read or looked at

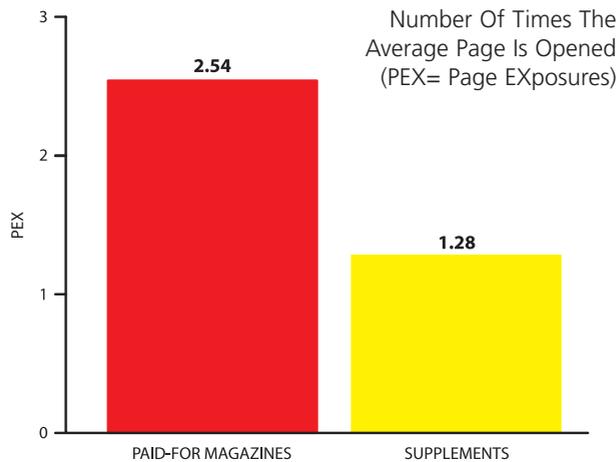
	Page EXposure (PEX) scores		
	Adults	Men	Women
All paid-for magazines	2.54	2.68	2.44
Motoring - performance cars	4.86	5.28	2.37
Bridal magazines	4.83	1.59	5.60
Slimming	3.95	1.52	4.42
Motoring - classic cars	3.73	4.25	1.12
Adult humour	3.63	4.02	2.42
Women's health & beauty	3.51	1.25	3.68
Motoring - other	3.31	3.65	2.43
Motorcycling	3.20	3.48	1.71
Men's & style magazines	3.20	3.39	2.34
Science & nature	3.02	3.32	2.59
Homes & decoration	2.90	1.80	3.31
Gardening	2.83	2.36	3.14
Parenting	2.82	1.36	3.23
Football	2.81	3.14	0.96
Other leisure interests	2.80	3.20	0.96
Country interests	2.64	3.03	2.11
Young women's magazines	2.61	2.48	2.63
TV listings weeklies	2.54	2.30	2.73
Women's general monthlies	2.44	1.74	2.54
Teenage	2.42	1.04	2.73
Golf	2.32	2.42	1.71
Music	2.28	2.46	1.87
Current affairs & finance	2.15	2.34	1.61
General interest - miscellaneous	2.07	2.33	1.86
Motoring - general	1.98	2.21	0.75
Angling	1.97	2.06	1.39
Retirement	1.93	1.43	2.02
Women's lifestyle	1.91	0.99	2.07
Women's weeklies	1.78	1.29	1.86
Film, entertainment & listings	1.76	1.79	1.73
Buying & selling (classified ads)	1.74	1.97	0.97
Customer magazines:			
TV listings	4.28	4.29	4.27
Women	1.64	1.17	1.84
Motoring	1.56	1.74	1.29
Newspaper supplements/sections	1.28	1.26	1.30

Source: QRS 2000

The adult page exposure scores range from 4.86 for performance car magazines to 1.56 for motoring customer magazines, and 1.28 for newspaper supplements/sections. The reason for this range is the different ways in which different categories of magazine are used by their readers. There are further variations between titles within each sector. And different kinds of reader are liable to show different scores: the general

principle is that core readers have rather higher page exposures than non-core readers.

All categories of magazine deliver a higher exposure to advertisements than NRS average issue readership suggests, for the NRS implies a PEX score of 1.00 for all titles.



In case it might be thought that the repeat exposures have no value for advertisers, there are three classic studies carried out by Alfred Politz in the USA [38]. For each study, 12 advertisements were tested among three matched samples of subscribers to a magazine. One sample was not exposed to the test advertisements at all, another was exposed to them once, and the third was exposed twice. Four different measures (brand familiarity, claim acceptance, rating of brand quality,

and interest in buying) all gave the same answer: compared with the control sample who saw none of the test advertisements, the effect on the people who saw the test advertisements twice was roughly twice as great as the effect on those who saw them once. That is, the additional effect of a second exposure in these magazines was roughly the same as the effect of the first exposure. Repeat exposure matters.

12. READERSHIP ACCUMULATION THROUGH TIME

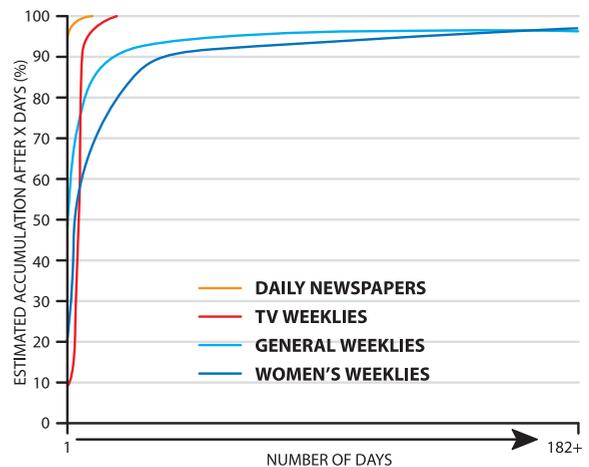
Not everyone who will read a specific issue of a magazine will read it on the day it is published. Some read it on publication day, some read it for the first time on the day after publication, some on the next day, and so on.

Several factors influence the speed at which the total readers of an issue build up. One is publication frequency: a typical weekly magazine accumulates new readers faster than a typical monthly. The more time-critical the editorial content, the faster the rate of accumulation of new readers of the issue. In general, the more readers per copy, the longer the period required for the later pass-on readers to first see the issue. The glossier and more robust a magazine is physically, the longer it is likely to be around to collect further readers. The distribution method plays a role too: a magazine that is largely mailed out to subscribers or customers tends to accumulate its readers faster than a magazine that largely sells in newsagents.

The speed at which magazines and newspapers build up the total readership of an average issue was measured in the Readership Accumulation Study published by the National Readership Survey (NRS) in 2004 [39, 40, 41]. The results were based on 7,001 people keeping diaries of their reading for one week. NOP World conducted the study.

The purpose of the study was to enable users to distribute through time the average issue readership estimates published by the main NRS survey. Every magazine and newspaper measured by NRS was given its own accumulation curve: that is, about 230 curves were published. In addition, summary curves for 25 publication groups are available. As examples of the types of curves produced, the two accompanying graphs show curves for a selection of eight of the publication groups.

Accumulation: dailies and weeklies



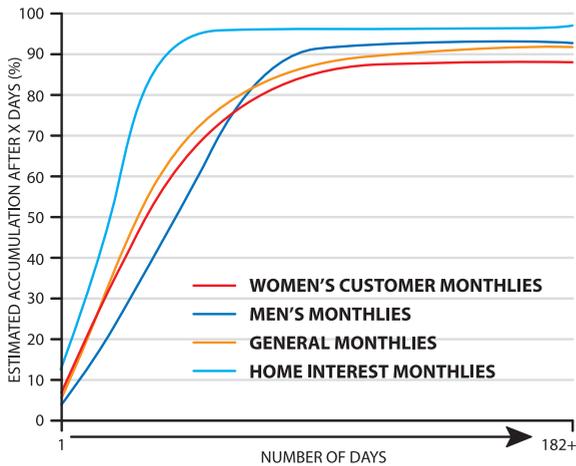
The first graph shows how quickly daily newspapers accumulate their readers, as one would expect. The short curve is lost in the top left-hand corner of the graph because the average daily has reached 96% of a given issue's readers on day 1, and another 3% catch up on day 2. Sunday newspapers (not graphed) are almost as quick, with 95% reached on day 1 and 99% by day 4, and newspaper supplements are not far behind.

The second curve is for TV weeklies. These magazines are published several days before the listed programmes start, so there is a slight S-shape to the curve because most readers do not obtain or look at it until day 4 when 60% have accumulated. After that, readership accumulates very fast as the viewing week covered by the programme listings starts. There are negligible new readers of the issue after the final day of the listings. Again, this makes complete sense.

The third curve shows the average for general weekly magazines: titles such as Auto Express, The Economist, Country Life and New Musical Express. 82% of readers see a given issue during week 1, and 91% have seen it by the end of week 2. The curve then almost flattens as pass-on readers take some time to be garnered, and after four months there are still 2% who have yet to see the issue.

Women's weeklies - the fourth curve - accumulate their readers at a somewhat slower rate than general weeklies. 62% of readers see the issue in week 1, and 79% by the end of week 2. 91% are reached by week 5. After four months there are still 3% of an issue's ultimate readers who have yet to see it.

Accumulation: monthlies



The second accompanying graph plots the curves for four of the monthly magazine groupings. The fastest-accumulating of these four categories is women's customer magazines, such as the Asda and Somerfield titles. Their method of distribution, editorial content, and relatively low readers-per-copy (for monthlies) mean that by week 4 they have built up 81% of their readers, and 99% are reached by week 9.

Men's monthlies – titles such as FHM, Men's Health and Esquire – are the slowest-building category of all 25 publication groups, in the early weeks. By week 4 only 36% of readers have seen the issue. But the group maintains its rate of climb for a longer period than several other groups for whom diminishing returns set in more quickly. In week 9 men's monthlies overtake the home interest group, and 90% of readers are accumulated by week 11. After six months there remain 5% of readers who have not yet seen the issue.

The other two curves in the graph have a similar shape to each other but general monthlies accumulate their readers slightly more quickly than home interest monthlies. After six months 6% of general monthlies' readers have yet to see the issue. For the home interest titles the figure is 9%, the highest percentage for any publication group. This reflects these magazines' physical durability, the relatively timeless quality of the editorial content, their ability to remain desirable to future readers, and thus their comparatively high number of pass-on readers.

These eight sample curves give a general impression of how readership accumulates. They show how variable it can be from group to group, and how the variations make good sense.

The driving force for measuring accumulation has been the need to improve the allocation of advertisements across a campaign period, in order to control the week by week delivery of ad exposures. This aspect is discussed in section 41 of this report. In addition, the data have been integral to a new analysis of the effectiveness of magazine advertising. The analysis, commissioned by PPA and published in 2005, is reviewed in sections 23 and 40.

The NRS accumulation curves are very similar to the curves previously found in the USA, when research agency MRI (Mediamark Research Inc) published a pioneering study in 2001 [42]. We can be confident that a broadly comparable pattern exists in most other countries around the world.

(B) THE ADVERTISER RELATIONSHIP: MAGAZINES' EFFECTIVENESS AS AN ADVERTISING MEDIUM

13. HOW READERS USE MAGAZINE ADVERTISEMENTS

We know from the JICNARS Reader Categorisation Study (discussed earlier in section 10) that the average reader of the average magazine has his or her eyes open in front of more than 90% of the spreads. Thus nearly all of the advertisements are at least glanced at in the process of screening the magazine's contents.

Having opened the relevant spread, how do readers use the advertisements? And why doesn't every ad get a 90% recall score in post-testing?

It has long been established that in general terms selective perception comes into operation. People screen the contents (ads as well as editorial) for things which have meaning to the reader. There are many ways in which an advertisement can hold meaning for the reader:

- she (or he) uses the product type or brand
- she recently gave up using the product type or brand
- she is interested in an activity portrayed in the ad
- she is interested in a famous person shown in the ad
- someone in the ad reminds her of someone she knows - a relative, friend or colleague
- she recognises the place shown in the ad
- the ad contains a dramatic, intriguing or amusing device - visual or in words or both
- the ad has some previous connection for her (e.g. remembering an earlier ad in the campaign, which amused/intrigued/interested her)
- and so on

If an ad conveys meaning, the reader will look at it more closely. If not, the reader's attention is likely to move on to something else on the spread or another spread.

A more detailed account of this process has been given by Wendy Gordon and Neil Swan of The Research Business [43]. Their full account is summarised by an inverted triangle.

They wrote "The diagram illustrates how people



consume press advertisements. There is an instant level of absorption in which either the product category, a simple message and/or the brand is communicated immediately. This happens in the time that it takes for a person to flick over the pages of a magazine or to page through a newspaper.

“If something about the advertisement succeeds in holding the reader’s attention, the next stage is one of searching, scanning and following the signposting. By this we mean that the reader absorbs additional brand information whether it be rational or emotional, speed reading through the advertisement by looking at visuals or paragraph headings.

“Lastly, the details of the supporting copy might be read completely or almost completely.”

If an ad can succeed in attracting attention - and every single ad has this possibility open to it - the communication that is delivered can be very effective indeed. This is essentially because the reader is in control of the timing of the exposure, and is thus in control of how the ad is used.

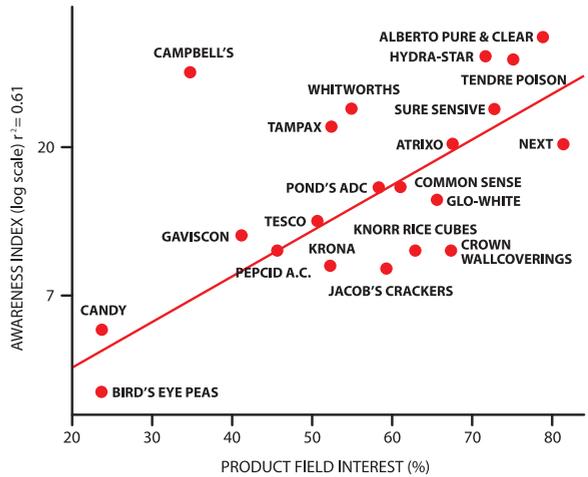
Other accounts of the way magazine ads are used by readers are given in section 21 dealing with pre-testing advertisements.

EFFECT OF INTEREST IN THE PRODUCT FIELD OR BRAND

It is well known that interest in or usage of a brand or product field is likely to increase the chance of an advertisement being noticed, as many studies have proved. An instance of this comes from IPC Magazines’ “Ad Track” survey conducted by Millward Brown [44]. This survey is discussed in more detail later on, but for the moment the following graph shows for 21 products the relationship between interest in the product field and awareness of the advertising. Nearly all cases lie on or close to the straight-line diagonal; in other words,

awareness of the advertising tends to increase as interest in the product field increases.

But hope is not lost for low-interest product fields. Print Awareness Index v Category Involvement



Magazines can overcome this through interesting and relevant creative work. On the chart, Campbell's Condensed Soup is an example. Awareness of the advertising is far higher than one would predict from the modest interest in the soup market. This was achieved through featuring two appetising recipes describing ways of using soup as an ingredient in cooking.

Even when the product field is low-interest, there is always a way of creating an ad that will be high-interest.

And it is wise to check the proposed creative treatments by pre-testing the ads before running them. The topic of pre-testing is discussed later.

14. ADVERTISEMENT NOTING

WHAT AD NOTING MEASURES, AND ITS LIMITATIONS

Selective perception, or ‘involvement’, which underlies the previous chart on product field interest, also explains some of the findings produced by advertisement noting techniques. Information is sometimes sought on the chances of an advertisement being seen if it is on a right-hand page versus a left-hand page; in colour or black and white; in a large size or a small size; at the front of the magazine versus the back of the magazine; and so on. Ad noting scores have long been offered as a way of providing some answers, though the technique has its limitations.

The method is 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. This can generate a spread traffic score (the percentage of readers who looked at anything on the two-page spread), a page traffic score (the percentage who looked at anything on the page) and an ad noting score (the percentage who looked at the advertisement). Averaging across all advertisements, or all within a given category, produces average ad noting scores.

The level of the ad noting scores is dependent on the form of the question asked. A question which merely 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, so they don't claim such glancing unless specifically asked about it. It makes a big difference to the scores. The JICNARS "Reader Categorisation Study" [34] has already been cited, which distinguished between "saw and read something" on the page and "saw but just glanced at" the page; combining both types of exposure yielded average page traffic scores of 90% or more.

As far as advertisements are concerned, one of the few published examples which made this distinction relates to ads which appeared in an issue of Big Farm Weekly, a publication for farmers [45].

In a traffic and noting study conducted by Gallup, 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 farmers had perceived the ads in order to decide not to study them. The breakdown of the scores for one of the advertisements, for a herbicide for barley fields, was as follows:

Originally claimed to have looked at ad	34%
Not originally claimed, but during follow-up question admitted had seen it	46%
Total claimed as seen	80%
Unsure whether seen or not	3%
Not claimed as seen, after follow-up question	17%
Total	100%

Although the ad noting score was only 34%, 80% of informants had actually looked at the ad. Even this was not the whole story because the spread traffic score was 82%, which is a better estimate of the proportion who had had their eyes open in front of the ad.

Our understanding of ad noting scores was assisted by a validation study by the Agencies Research Consortium, a group of about 30 advertising agencies [46]. BMRB developed a technique called DEMOS (Direct Eye Movement Observation System) in which respondents waiting in a waiting room read a magazine or newspaper on a lectern, while their eye movements and the page that was opened were secretly filmed by two hidden cameras. By superimposing the film of eye movements onto the film of the opened pages it was possible to analyse exactly where on each page the eyes were directed. Once the filming was completed the respondents were shown into another room and given a traffic and noting interview, using the same issue of the publication they had been observed reading in the waiting room. It was then possible to compare the reading claimed in this interview with the reading observed from the films. There were some dramatic differences, largely in the direction of under-claiming in the personal interview. The page traffic and ad noting data were clearly not measuring exposure but communication of some sort. The scores were reflecting interest and involvement in the subject matter of the article or advertisement, as opposed to exposure to the page or ad (which was typically much higher).

Another reason for page traffic and ad noting scores being under-estimates of exposure concerns the age of the issue at the time the interview was carried out. If the interview is conducted too soon (e.g. a day or two after a magazine is published) the reader may not have finished reading the issue, and thus may correctly not claim to have read a page which would actually be read a little later. If the interview is conducted too late (e.g. two weeks after a weekly magazine is published) the

respondent's memory may have faded, and there may be confusion with reading of the subsequent issue. There is no perfect timing.

INDICES OF AD NOTING, BY SIZE, COLOUR AND OTHER FACTORS

Nevertheless, average noting scores broken down by type of advertisement can give an indication of the relative effect of size, colour and position of advertisements - provided one bears in mind that the indices are not reflecting exposure to the ads, but recall of (and thus involvement with) the ads. If the sample and variety of advertisements is large enough, the effect of other variables - especially creative execution and product field - are averaged out.

Noting scores are no longer researched regularly in the UK, but in 2004 Media Dynamics Inc compiled averages based on studies conducted in the US over a number of years by Burke, Gallup & Robinson, Starch and other research organisations [47]. The resulting noting scores were indexed with the score for an average four-colour page advertisement as 100.

	Index
Page, colour	100
Page, 2-colour	78
Page, black & white	74
Inside front cover, colour	112
Inside back cover, colour	90
Outside back cover, colour	120
Inside front cover gatefold, colour	145
2-page spread, colour	130
2-page spread, 2-colour	110
2-page spread, black & white	95
2/3 page vertical, colour	81
2/3 page vertical, 2-colour	60
2/3 page vertical, black & white	60
Half page horizontal, colour	72
Half page horizontal, 2-colour	56
Half page horizontal, black & white	56

The results show a logical progression by size: the larger the advertising space, the greater the recall score. Full colour outscores two-colours, which in turn outscores

black & white in the larger spaces but they are level in the smaller spaces.

Additional American information comes from Starch Tested Copy data from the Roper Starch research agency during the period 1981-1990, based on measuring a range of consumer magazines [48]:

	Index
Left hand page, colour	100
Right hand page, colour	101
Left hand page, black & white	100
Right hand page, black & white	100
Non-bleed, page colour	100
Bleed, page colour	115
Non-bleed, page black & white	100
Bleed, page black & white	111
Standard size magazine pages	100
Small pages (Reader's Digest size)	104
First third of magazine	100
Middle third of magazine	95
Last third of magazine	87

The indices show little difference on average between left-hand and right-hand ad pages. Bleed pages (ads printed to the edge of the page with no margins) outscore non-bleed, in both colour and black & white. The physical size of the page does not make a significant difference, comparing Reader's Digest-sized pages and the larger standard sizes. Early ad pages in a magazine tend to score rather better than late pages on average, but it is heavily dependent on the specific content of each page - which reminds us that these are recall scores, not true exposure scores.

New data were published in 2005 by Medialogue, the advertising sales house of Sanoma Magazines in Belgium. Their report "Stop/watch" [49] published scores based on 2,879 advertisements tested in mass-market magazines in Belgium during 1996-2004. Ads were scored on eight measures, but the one relevant in this context is the Starch-like recognition score. Scores below are indexed, with the top item in each block indexed as 100.

Page	100
Double-page spread	116
Half page	84
Quarter page	75
Inside front cover	113
Inside back cover	108
Outside back cover	117
Full colour	100
Black & white/2-colour	79
Left hand page	100
Right hand page	104
First third of magazine	100
Middle third of magazine	98
Last third of magazine	96
Non-relevant editorial context	100
Relevant editorial context	106

In general the indices move in the same directions as the American data, though not always to the same degree. The principal difference is that Medialogue reports only a negligible difference between the first, second and final thirds of the magazine whereas Starch reports more substantial differences.

Medialogue adds an interesting new analysis: there is a modest advantage in being among relevant editorial content, such as a food product being advertised within a cookery feature. This score is about recognition of the ad; there are further advantages in the way the ad is

Index experienced by the reader. While engrossed in a specialist section such as cookery, motoring, fashion or home interiors, the reader is already in the mood to be receptive to an ad for a product or service in the same field. (See section 15 for more on this.)

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 with most magazines the advertisements are regarded as an integral and important part of the content. It is then the readers who control the order in which ads are looked at, and the attention and time devoted to each one. Moreover advertisements are distributed more evenly throughout the medium than is the case with television and radio.

Consequently 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 [49] published in 2005 by Belgium's Medialogue (described above).

Index 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.

Ad on same/preceding/next page 100
 No ad on same/preceding/next page 101

No competitor in same issue 100
 1 competitor in same issue 102
 2 competitors in same issue 102
 3-4 competitors in same issue 103
 5-8 competitors in same issue 101

Less than 20% ad ratio 100
 20%-30% ad ratio 104
 30%-40% ad ratio 109

There is no advantage (in terms of recalling the advertisement) in being physically distant from all other advertisements. Ads with other ads close by achieve more or less the same average score as ads that are alone. The difference between an index of 100 and 101 is not statistically significant.

Nor is it a drawback 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 the same issue. Computer magazines are a good example: many are thick with advertisements and catalogues, forming a marketplace.)

Finally, 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

Clearly, ad clutter is not a problem with magazines.

EYES OPEN IN FRONT OF PAGE: THE REAL MEASURE OF NET AUDIENCE TO ADS

Readers generally open all or almost all pages and are thus exposed to the ads as well as the editorial, which means that the publication has done its job of putting the ads in front of the eyes of the audience. The Reader Categorisation Study (discussed in section 10 above) showed that 90% of readers looked at the average page in a magazine. The limitation of the Starch and almost all other page traffic and ad noting techniques is that it is not clear to respondents that just glancing at the page counts as exposure to the page or ad. The readers think they are only to report the pages or ads that made a memorable impression at a conscious level – which depends on the attributes of the advertisement (such as creativity and likeability) and also the reader: the reader's needs and interests, attitudes towards the brand, and experience of other communications from the brand.

The high spread and page traffic scores from the Reader Categorisation Study have been echoed by a German project [50]. Measuring eye movements, it was found that eye contact is made with approximately 90% of all advertisements.

The figure of 90% of readers looking at the average page is simply a measure of net audience, of course. The gross audience takes account of repeat reading and is considerably higher, as section 11 described.

15. ADVERTISERS BENEFIT FROM THE READER-MAGAZINE RELATIONSHIP

The affinity between readers and their chosen magazines, established in previous sections, greatly benefits advertisers. The powerful intimacy rubs off onto the advertising, awarding it an authority and trustworthiness. There is a positive effect on the perception and absorption of the advertisements. The editorial content delivers a reader in the right frame of mind to be receptive to the advertisers' messages. An advertiser quoted by Reader's Digest [51] was spot on when he said "The editorial/reader relationship is a one-to-one conversation, and in time it creates a bond of trust, of belief, expectation and empathy. It is through the quality of this relationship that an aperture or opening to the reader's mind and heart is created, through which we advertisers can establish communication."

Because magazines can serve a niche market, readers of such titles feel a sense of being a member of a 'closed club'. This aspect of magazine reading means that the advertisers know they are free to be cheeky or adventurous or whatever is appropriate for the particular niche, because it is a private conversation among like-minded people.

The bond between readers and their chosen magazines means advertisers can imply to readers that "not only do we have something to sell but we are also part of the fantasy created by the magazine", as Christine Walker expressed it at the 2002 PPA Conference [52]. She continued "There will always be an unquantifiable quality about magazines. It's what makes them special. It's about tying one's brand into a monthly or weekly statement about how people are living today – in the real world and in their imagination."

HOW IT WORKS

This rub-off effect was investigated in the qualitative survey "Women & Magazines: The Medium & The Message" published by National Magazines and G+J of the UK [22]. It found that the way an advertisement is perceived in a magazine and the level of involvement between the reader and the advertisement is likely to depend on the reader's expectations of advertisements in the publication, the advertisement's degree of compatibility with the magazine as a brand, the strength of the reader's relationship with the magazine, the advertisement's positioning relative to editorial, the mode of reading, the intrinsic qualities of the advertisement, and the reader's historical relationship with the advertised product.

The research report said "The reader approaches the magazine in a frame of mind geared to absorbing that

particular magazine's personality and opinion. The advertising can be absorbed as part of this opinion – provided that it is close in character, style and brand values to the magazine's personality. The closer the advertisements are to the magazine's ethos, the more authority they achieve. Compatible advertising will carry the endorsement of the magazine's personality – a powerful benefit because of the way women identify with the magazine they have chosen. Thus when an advertisement in a magazine resonates with the character of that magazine's personality, it is capable of achieving a synergy with the remaining content. When this occurs, the advertising and editorial are mutually reinforcing and promote maximum reader identification with both advertisement as brand and magazine as brand. A dual branding is thus achieved... The stronger the reader's affiliation with the magazine as a brand, the higher the level of endorsement that the advertising receives from the magazine's personality."

It is illuminating to see why the research confirmed the notion that it pays to position advertisements close to relevant editorial. The mood induced by reading the editorial on a topic transfers beneficially to an advertisement nearby on the same topic. It helps induce involvement with the ad, and identification of the ad as being 'for me'. One of the informants said:

"I think what you read heightens your interest in that particular subject. If I was reading this on fashion design and that Miss Selfridge ad was in it, because I'm already attuned to fashion design I would be that much more aware. It's the same as Sharwoods. If Sharwoods was in the middle of my catering, in my recipe section, I might actually look up the recipe that it's advertising."

A related statement was made by an informant in another survey, the AIM study [53]:

"If there's an article on beauty products, the next page might be an advert on a beauty product and it's almost an addition to the article. It's welcome because it's informative."

ADVERTISING: ESSENTIAL AND ENJOYABLE

The "Media Values" survey from IPC Magazines [9] showed that advertisements in magazines are seen as essential and well liked.

Among adult readers of magazines of all types, 65% agreed with the statement "The ads are an essential part of this magazine". There was naturally some variation according to the type of magazine. Among

readers of motoring magazines 80% agreed with the statement as it applied to motoring titles. For motorcycling magazines 76% agreed. For house and home monthlies, and fashion beauty and hair monthlies, 75% agreed. At the other end of the scale, advertisements are just not very relevant for one or two types of magazine. Only 8% of readers of puzzle magazines agreed that the ads are an essential part of the magazine. The next lowest figures were 47%-49% agreeing, for publications such as romantic magazines.

Incidentally, the 65% average for all magazines was a good deal higher than the equivalent figures for any other form of media. For newspapers, colour supplements, commercial television, commercial radio (the runner-up) and cinema the ads were not seen as such an essential part of the medium.

Another "Media Values" statement was "I enjoy the ads in this magazine". Again there was a high average score for all magazines, with 62% agreeing. This was higher than for any of the other media forms; television was the runner-up.

WOMEN'S STYLE/FEATURE MONTHLIES

The affinity between reader and magazine, and its rub-off onto the advertising, was demonstrated among women's style and feature monthlies. SouthBank Publishing Group conducted a study called "Today's Fashionable Values" [54]. 1,650 postal questionnaires were received from readers of three magazines, asking about their interests, lifestyle, and attitudes towards advertisements in their magazine.

The study showed that readers treat advertisements as an integral part of their magazine, and that the readers' trust in the magazine is extended to the advertisements in it.

Thus 69% agreed with the statement "I see advertisements in magazines as a source of information". 69% agreed with the statement "I trust the advertisements in ...(magazine)...". 65% thought "... (magazine)... only carries advertisements for products they approve of". Thus an endorsement of the ads by the magazine is perceived to some extent.

The advertisements carried by these magazines were seen as good quality, tasteful, and informative - the same qualities that were delivered by the magazines themselves. 72% of readers said they had bought a product as a direct result of seeing it advertised in their magazine. In fact, 55% agreed with the statement "I often buy beauty products I have seen advertised in

magazines", and 47% agreed "I have bought perfume as a result of testing it from a scent strip". 81% agreed with the statement "A recommendation in a magazine is more likely to make me try a product". So the readers are wide open to suggestions, whether from an editorial mention or an advertisement.

When the magazine's brand values are complementary to those of the advertised product, a multiplier effect occurs. The advertising becomes more effective than it would be if seen out of context or in a less appropriate medium.

WOMEN'S DOMESTIC MONTHLIES

A survey by RSGB called "The Dynamics of Communication" [55], which interviewed average-issue readers of Prima, Essentials, Family Circle, Good Housekeeping and Woman & Home, underlined the value to advertisers of the strong reader/magazine relationship. The survey found that:

- 1 The more closely that a reader identifies with a magazine as a brand, the more positively she responds to the contents of the magazine, including the advertising.
- 2 The more committed and loyal a reader is to her magazine, the more she will value and trust its contents.
- 3 The greater the degree of involvement that a reader has with her magazine, the more attention she pays to it and the more use she makes of it.
- 4 If a magazine succeeds in inspiring its readers it will give them new ideas for things to do and to buy.
- 5 When brand affiliation, commitment, involvement and inspiration are all achieved, the reader's reaction to the magazine's contents is especially powerful.

Another example, this time among a very specialised kind of women's domestic monthly - parenting magazines [56] - is described on the website www.hmaw.net

WOMEN'S WEEKLIES

A further piece of research moves us from women's monthlies to women's weeklies. IPC's Weeklies Group commissioned a qualitative study called "The Women's Weekly Magazine Environment", carried out by Robert Quayle [57]. This established that readers of IPC's

women's weeklies perceived their favourite magazine as a dependable and trusted friend, someone the reader could relate to. One reader said "It's similar to being with one of your friends, having a good chat." The magazines were frequently read during time deliberately put aside to relax, and were seen as a well deserved indulgence.

Readers' favourite women's weekly magazines are sources of advice, guidance and inspiration across a range of subjects. This trust is based on the assumption that the magazine has no reason to be biased for or against any brand or point of view, and that they would research any given area thoroughly and objectively. There was also a sense of continuity of editorial staff which made the magazines seem reliable. This perception of magazines being totally scrupulous editorially extends into a trust in the products advertised within them.

Advertisements were consumed with interest along with the editorial, provided the ads struck a chord. One reader said "Some of the adverts are interesting reading in themselves". Another said "Even though you don't think you read the adverts, more often than not you do. And you remember them." Readers used the advertisements as sources of new ideas. Women used the magazines as a way of keeping up to date with new products, and for this relied as heavily upon the advertising in the titles as they did upon the editorial.

Sometimes they took it that step further and acted upon the information. Most respondents were able to cite examples of products they had bought as a direct result of advertisements they had seen in magazines. Respondents said things like:

"Without realising it you're taking it in: 'next time I go to Sainsbury's I must make sure I get some plasters' sort of thing."

"Often you see things you've never seen before, new products that come out like furniture polish that smelt like pot pourri, I saw it in a magazine and went and bought it."

"It's a good source of knowing what's about."

"It's important to see new food products because when you go out food shopping you actually have in your mind what you want. But if you know there's a new food product you might look for it. It keeps you really up to date."

"Beauty products and creams - you're not going to notice new ones anywhere but in a magazine."

"I read that advertisement to see if I could get any ideas for Christmas presents. There were a couple of things I thought would make nice presents."

"If you think about it, that's where we get most of our information anyway."

"Quite often adverts can trigger something off, so you can see something in a magazine and think 'Oh yes, I've got to do that'."

Money-off coupons and free samples could also lead directly to purchase.

TELEVISION WEEKLIES

The final verbatim comment quoted above was later adapted as one of an array of agree/disagree statements put to the panel of regular readers of television weeklies run by NOP Solutions for IPC tx [20]. 68% agreed that "Quite often adverts trigger something off; you see it in a magazine and think 'I'll try that'." In another reflection of the rub-off effect from magazines, 71% agreed that "If you know about a product from reading about it, that's better than just seeing it on the shelves".

The way a magazine can be seen to endorse a product advertised in it was illustrated when as many as 31% of the panel agreed with the statement "The products in these weekly TV magazines are endorsed by the magazine".

16. THE 'PRESENTER EFFECT'

The way a reader interprets an advertisement can be influenced by the specific publication in which it appears.

This important point has been proven in several controlled experiments in which the same advertisement is shown in or attributed to different publications, and reactions in each context are compared. The differences in the reactions have been dubbed 'the presenter effect'.

The early pioneer of this approach was Alan Smith, then of IPC Magazines, who in 1972 reported on studies covering a number of advertisements [58]. One was for a vinyl floor covering made by Armstrong-Cork. The same advertisement was presented as appearing either in *Ideal Home* or in the *Sunday Times Colour Magazine*, to see whether these two environments influenced the communication delivered by the advertising. Under the pretext of discussing something else, informants were exposed to the advertisement in a way that did not draw special attention to it. Part of the sample saw the advertisement flagged 'As advertised in the *Sunday Times*' and the other part saw it flagged 'As advertised in *Ideal Home*'. Shifts in attitudes before and after seeing the advertisement indicated that association with *Ideal Home* clearly gave the product an added quality image, whereas association with the *Sunday Times Colour Magazine* gave a stronger impression that it was a product that you could lay yourself.

The National Magazines/G+J survey "Women & Magazines: The Medium & The Message" [22] included a similar experiment. Advertisements for twelve varied products were shown to respondents. Each ad was seen by some people in a weekend colour supplement and by

others in a women's weekly or monthly magazine (according to which titles she normally read).

Some general conclusions were drawn from the results. Women's magazines and colour supplements tended to confer differing attributes upon the message of the advertisements they contained. For example, women's magazines were more likely to confer trustworthiness, quality, private information (rather than information for everyone), relevance ('for me'), a connection with the editorial, and relevant authority through endorsement of the magazine's personality - and the latter aids reader identification and involvement with the product. The report stated "The key attribute and asset that advertising in women's magazines can bring is a frame of relevance to the reader - a feeling of 'my sort of brand'. In several cases here the advertised brand's perceived relevance is significantly greater to the reader when seen in a magazine than a supplement. Conversely, if an advertisement is perceived as irrelevant to the publication, it is distanced from the personality and may lose authority."

Another example of a presenter effect is given in the next section, showing differing price expectations according to the magazine in which a clothes outfit was seen.

There is no doubt that the media environment can affect the communication delivered by an advertisement. However the size of the effect will vary according to the circumstances - such as the strength of the advertised product's personality, the strength of the magazine's own branding, and the characteristics and experience of the reader.

17. TARGETING IS A KEY STRENGTH OF MAGAZINES

Magazines can target specific groups of people with precision and without wastage. The targeting can be defined in terms of demographics, interests (e.g. sailing), or a variety of other ways.

Targeting can be achieved in terms of quite subtle variations in attitude, since individual magazines can be chosen which represent specific outlooks on life. The product to be advertised can be matched to the appropriate magazine, and thus the relevant audience. For instance, within a group of magazines as superficially similar as the leading women's weeklies, there are important editorial differences which attract slightly different kinds of women - as illustrated by the "Editorial Dynamics" research [10] cited earlier.

Targeting as applied to the market of 15-24 year olds was explored by the ROAR project [59]. Seven media companies including EMAP Consumer Magazines conducted quantitative and qualitative research from 1995 onwards under the name ROAR (Rights Of Admission Reserved). It showed that there is no such thing as an 'average' 15-24 year old. Instead the sample was clustered into seven distinct groups, based on answers to 42 attitude statements. The clusters were given labels - New Modernists, Corporate Clubbers, Conservative Careerists, Moral Fibres, Blairites, Bill & Ted, and Adolescent Angst - and each had its own set of values, motivations, and relationships with media and brands. A given brand will appeal more to some clusters

than to others, and the relevant clusters can be targeted for advertising by choosing the magazines that these clusters read.

A study from Conde Nast [11] indicates differences between magazines in the attitudes of the readers they attract. ABC1 women readers of five women's fashion and style monthlies were interviewed. A photograph of a clothes outfit was shown and readers were asked how much they would expect to pay for it if it was advertised in a particular magazine. On average, readers of one magazine expected the outfit to cost £159 if advertised in that magazine. Readers of magazine no. 2 expected it to cost £209 if advertised in magazine no. 2. Readers of magazine no. 3 thought it would be £223 if advertised in magazine no. 3. The other two magazines fell within this range. The considerable variation from £159 to £223 arises from two factors: a presenter effect and differences in the outlook of the five types of reader. Readers of magazine no. 3 may well be used to paying higher prices for clothes than readers of magazine no. 1, and have a different outlook on pricing of fashion outfits. That is, the magazines themselves are targeting subtly different kinds of reader.

As the Henley Centre's report "Magazines into 2000" points out [2], "the targeted nature of magazines typically results in a close relationship between the magazine and the reader and inspires a high degree of active reader involvement".

18. CREATIVE EXECUTIONS TO MATCH THE MAGAZINE

Magazines' ability to select particular target audiences means there's the opportunity to enhance the communication by using different creative executions in different types of publication. A ready example would be a product for all age groups whose advertising schedule includes teenagers' magazines as well as titles serving an older market. Running different advertisements in the teen magazines could increase their readers' feeling that the product was truly for them.

EMAP's "Youth Facts 4" survey [17] bears this out. A range of advertisements from youth magazines was shown to the sample of 11-19 year olds and their reactions assessed. The survey's conclusion was that "the youth of the nineties are an extremely advertising literate bunch. Having been bombarded by billions of advertising messages since babyhood, they have increasingly high standards. Hugely appreciative and enthusiastic if an advertisement hits the right note, teenagers can be downright cynical if it doesn't... Fun, simple yet novel images which are specifically tailored to this target market tend to be most favourably received."

The ROAR project [59] emphasised this. 15-24 year olds' views on advertising were summarised by the comment "If you don't talk to me in the right way, you're not coming in". The project found that messages are more likely to be trusted, digested and acted upon when there is synergy between the brand itself and the publication in which the message is read.

The AIM study [53] contributed evidence outside the teen market. AIM (Ads In Magazines) was designed by SouthBank Publishing Group to examine a wide range of advertisements appearing in women's monthly magazines, in response to pleas for more qualitative research. Over one hundred advertisements were chosen, and assessed in postal surveys among more

than 5,000 readers, and in focus groups and individual depth interviews conducted by Robert Quayle. A central finding was the importance of running creative treatments that were appropriate for the readership and the editorial environment. "Deliver the brand message by tailoring advertisement to magazine style; empathise with the readers - don't alienate or patronise them; reflect the language of the audience or the lifestyle."

Women readers' reactions to car advertisements are an example. The AIM report said "The car category often seems to be the reserve of men but results from AIM provide invaluable insights for car advertisers into how and how not to talk to women. Generally, readers felt car ads didn't speak to them, either because they were alienating or patronising." One advertisement was particularly criticised in a focus group of Woman & Home readers. While the ad looked attractive, the copy not only failed to engage their interest, it actively repelled them because of its male-oriented attitude. One reader succinctly said "Have you read this? 'Seductively curvaceous bodywork'! Come on - do women look for that?" In contrast an ad for a different car was very positively received because it combined creative interest with the right tone of voice for women, and it successfully captured a mood with the readers.

At a PPA seminar Roy Edmonson, Marketing Director of Levi-Strauss UK [60], declared his view that each market segment must have its own magazine advertisements. Not only that, for Levi Jeans with their particular and strong image, he feels that each selected magazine's own branding must fit with the product's branding. The attitude of the magazine needs to match the attitude of the brand. "Small and perfectly formed magazine readerships minimise waste and are very cost-effective." For the 15-19 year olds who are the core target audience "the ad must look as exciting as the editorial".

19. CREATIVE FORMATS: IMPACT AND INTERACTION

In addition to standard display advertising, there are opportunities for using other creative formats within magazines. Their ability to heighten impact and interaction was described in the most comprehensive research to have investigated this area - a 2003 qualitative study called "Creative Format, Premium Impact". It was commissioned by PPA and conducted by Rachel Lawes of Lawes Consulting [61]. 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. Formats incorporating thermachromatic (causing images to change with heat) or lenticular (where the image appears to move) elements are two examples. Different weights, qualities and textures of paper; embossing; die cutting and unusual trimmed pages; scratch 'n' sniff or 'peel it' fragrances; 3-D specs with which to view a 3-D 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".

SAMPLES, VOUCHERS AND GIFTS

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 making a gift as personal, flattering and meaningful as possible, rather than something that could have been chosen for anybody. (More information about samples is given below.)

SPONSORSHIP AND SUPPLEMENTS

Sponsorship implies endorsement of the advertiser by the magazine – whether the 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.

ADVERTISEMENT FEATURES ('ADVERTORIALS')

Advertisement features, or 'advertorials', which are written in the house style of the host magazine, enable the advertiser to don the mantle and sport the values of the magazine. Rachel Lawes 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.

In addition to the "Creative Format, Premium Impact" research, other studies have investigated advertisement

features. One was “Advertisement Promotions: The Readers’ Perspective”, a qualitative study by The Research Business for the National Magazine Company [14]. Readers of eight of National Magazines’ titles were interviewed. After establishing that readers believed conventional advertisements in magazines can be informative and entertaining, and are seen as essential to the magazine, particularly when executed well, the results went on to show that advertorials are 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 take a closer look at a product. The National Magazines research 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.

One reader said “Although it is an advert it looks like it could be an interesting article”.

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. One respondent declared “It says ‘an Esquire promotion’ so it looks as though Esquire are endorsing the product and that in my eyes gives it extra value.”

This endorsement by the magazine was also a prime finding from a survey for SouthBank Publishing Group called “Advertorials: Qualitative Research” [62]. The 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.

SAMPLES, BOOKLETS & INSERTS LINKED TO ADS: FURTHER EVIDENCE

Rachel Lawes’ conclusions about samples have been complemented by other evidence. One is an analysis by Belgium’s Medialogue in their “Stop/watch” ad barometer research [49]. It measured advertisement noting/recognition (see section 14 on this topic) for advertisements carrying samples, inserts and booklets.

	Index
Standard flat advertisement	100
Insert (loose or fixed) linked to ad	112
Reply card linked to ad	118
Booklet linked to ad	120
Sample	141

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 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 2002 called “The Samples Research” [63] 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.

The power of sampling was proved in a 2004 study in the UK. IPC Innovator (part of IPC Media) and the consultancy Sampling Innovations commissioned research among readers of Marie Claire magazine [64]. 1,000 readers of Marie Claire were interviewed over the telephone by research agency The Wire, to compare readers who had been exposed to an advertisement that included a sachet containing a beauty product, and those who had instead seen an ad for the same advertiser which did not include a sachet. It was found that among those seeing the issue containing the ad with the sachet:

- Awareness of the ad increased by 42% (almost identical to the 41% in Medialogue's "Stop/watch" research)
- Likelihood of purchasing the product increased by 56%
- 64% of readers had removed the sachet
- 80% of these had used the product inside (i.e. 51% of all readers had used the sample)

INSERTS NOT LINKED TO AN AD

Inserts which are linked to an advertisement in the issue are quite different from loose inserts which have no link with anything in the issue. In 2003 the Direct Marketing Association commissioned The Future Foundation to carry out qualitative research to investigate consumer perceptions of inserts [65].

Loose inserts are perceived as an independent advertising medium, and do not benefit from implied endorsement by the host magazine. While there are obviously many negative attitudes to inserts - centred mainly around irrelevance, being unasked-for, and questions of trust concerning the advertisers - there are also some positives. Inserts are a familiar and accepted part of the media landscape, expected as part of the deal that consumers get when they buy magazines and

newspapers. Most people have responded to inserts at some time. Relevance to the reader is naturally a key factor in getting attention. Successful inserts are creative and attention-grabbing, their content and offer is quickly made explicit and clear, they are presented in an engaging way, and they work to establish the advertiser's credentials as a trustworthy company. The more the proposition is in tune with the host magazine's editorial content, the more likely that close attention will be given because of an expectation that the insert may be personally relevant. For this reason respondents were most positive about inserts in specialist interest magazines. Inserts in the form of a catalogue or mini magazine tended to be given more attention, as did promotions and special offers.

Inserts tended to be liked more than postal direct mail and door-drops which were seen as more intrusive and something of a personal affront. Attitudes to inserts were also better than to SMS campaigns. As one respondent remarked, "a text message is a bit more intrusive". Something unwanted coming through your letterbox or on your mobile phone is more of a violation of your privacy than a loose insert in a magazine which you have chosen to buy or read.

20. ACTION AS A RESULT OF SEEING MAGAZINE ADVERTISEMENTS

Previous sections have included several examples of readers taking action as a result of being exposed to advertising in specific kinds of magazines.

Research by the Henley Centre supports this with evidence concerning magazines in general. In the Centre's "Media Futures" survey [66] they found that "consumers are more likely to act as a result of seeing advertisements in a magazine than as a result of seeing advertising in other media." Adults were about 38% more likely to say they had bought a product or service as a result of advertising seen in magazines compared with advertising seen on television, and over 50% more likely compared with advertising seen in newspapers. And they were twice as likely to say they had bought a product or service after seeing an article or programme, if they had seen it in a magazine compared with a newspaper or television. Similarly, making enquiries about an advertised product or service was about 50% more likely if the advertising had been seen in a magazine rather than in a newspaper or on television. The figures for radio were far inferior to those of the other three media.

The survey "Perspectives of a Woman's Monthly Magazine" [29] provided information about readers' expectations about their reactions to what they read in their magazines. It interviewed average issue readers of 15 women's monthly magazines. They were asked "Would you expect to do...(named activity)... as a result of reading...(named magazine)..?" The active way in which readers expect to use their magazines is well illustrated by this selection of results:

Women's domestic monthlies:

Take any of 14 listed actions	99%
Do cooking	83%
Try health suggestion	76%
Buy food product	73%
Buy home product	68%
Do gardening	68%
Make for home	59%
Restyle home	56%
Do sewing	47%
Do knitting	47%

Women's style monthlies:

Take any of 14 listed actions	90%
Try beauty suggestion	74%
Try health suggestion	73%
Buy beauty product	69%
Buy fashion item	67%
Try diet idea	57%

Women's feature monthlies:

Take any of 14 listed actions	94%
Try health suggestion	77%
Try beauty suggestion	73%
Buy fashion item	67%
Do cooking	67%
Buy beauty product	64%
Financial/legal advice	33%

Between 90% and 99% of readers expected to do at least one of the 14 actions on the list shown to them.

All of the actions on this list mean buying, or imply a likelihood of buying, products, whether it is ingredients for cooking, wool for knitting, or fashion clothes - and regardless of whether the original stimulus was an advertisement or an article.

Note that the three categories of magazine produce rather different results, consistent with their different editorial functions.

As the "Perspectives" report says, "readers expect to react to all areas of their magazines as a result of reading. Very few expect to do nothing. Expectation to react reflects to a strong degree levels of interest. This interest converts very powerfully to reaction. Magazines are an enormously responsive medium from which advertisers can benefit. The interactive communication means that magazines inspire women to react in a variety of ways... Perception of advertising equates to the perception of editorial in a magazine. Readers apply the same brand values to the entire contents of the magazine. Advertisers can clearly identify the benefits of advertising in each magazine and gain from association with that brand."

The "Youth Facts 4" survey [17] contributed some information about action taken by 11-19 year olds as a result of seeing advertising in magazines. 43% said they had gone out and bought something. 32% had used money-off coupons or discount cards. 21% had sent off coupons for more information about products. 9% had used a Freephone number and 9% had used a premium rate number. 70% of the sample had done at least one of these things as a result of being exposed to advertising in magazines. 72% said they find the advertising in their magazines useful.

Hello! magazine has established a reader panel which is occasionally sent a questionnaire, mainly to assess the editorial impact of a recent issue [67]. One questionnaire asked "As a result of reading advertising in Hello!, have you ever purchased or ordered a product advertised?" 45% of readers had bought something -

specifically as a result of seeing advertisements in the magazine. In addition 13% had called for further information. Allowing for some overlap, 53% of readers had either bought something or sought further information, or both.

IPC's "Media Values" survey [9] provided more evidence of magazines' role in stimulating purchasing ideas. Readers were asked whether they agreed or disagreed with the statement "This magazine gives me ideas of what to buy". The level of agreement was high, rising to 89% agreeing in respect of young women's weeklies/fortnightlies, 89% for gardening magazines, 83% for fashion beauty and hair monthlies, 81% for home and family monthlies, and so on. The average for all types of magazine was 66%. In other words two-thirds of readers of a typical magazine thought that the magazine gave them purchasing ideas.

Incidentally, this score of 66% was much better than the equivalent figure for other types of media. Only 49% of viewers thought commercial television gave them ideas of what to buy. Only 23% of newspaper readers thought newspapers gave them ideas of what to buy. Commercial radio had a similar figure. For newspaper colour supplements the figure was 39% - lower than every category of paid-for magazine except nature magazines and puzzle magazines.

IPC's "Specialist Magazine Values" survey [68] added to the evidence that magazine ads prompt action. Action arises from the magazines' role as a vital source of

information. 85% of the readers of specialist magazines said they regularly use their magazine for information about their area of interest. Indeed in seven of the nine specialist markets the magazines were considered the very best source of information - better than television, radio, national newspapers, local newspapers or other sources. Only for football and (narrowly) rugby did another medium score better than magazines. The information-providing role of specialist magazines is closely associated with trust in the publication, as exemplified by the statement "I can trust this magazine to write reliable reviews": 82% of readers agreed with this and only 1% disagreed. It is only a small step to the proposition that "If this magazine recommends a product I am more likely to buy it", with which half of the readers explicitly agreed, and only 14% disagreed. 60% stated that the ads are an important part of the magazine and only 11% disagreed. 90% of readers said they read the ads in their magazine, and 83% agreed that the advertising keeps them informed of what's available. 62% declared that the advertising is useful in deciding what to buy or where to go. These are impressive scores, especially given many people's aversion to admitting that they are influenced by advertising.

PPA's 2002 survey "Absorbing Media" [27, 28] added new evidence about action prompted by magazines, and showed that magazines are more action-oriented than any other medium, with the internet ranking second. Details on this and other information about action taken are given in section 30.

21. PRE-TESTING MAGAZINE AD CREATIVE WORK

THE NEED FOR PRE-TESTING

The creative work is key: successful advertising depends upon executions which are effective for the campaign's objectives. Advertisers have every reason for wanting to ensure that their ads communicate what is intended. Magazine publishers too must be concerned with the quality of the ads they carry. If a magazine advertisement is not very effective because of the creative work, it reduces the chance of that magazine and indeed any magazine winning advertising from that client in the future.

Assuming that the marketing objectives, and the communications strategy for achieving these objectives, have been determined, some form of pre-testing of the creative content is desirable - even if only through small-scale qualitative research which checks whether the ad does in fact convey what it is intended to communicate. Any execution which does not perform sufficiently well can be revised, and the pre-test can suggest how it might be improved.

The majority of television commercials are pre-tested before they go on air. Many fail at that point and so it's back to the drawing board, until a creative approach and treatment emerges which performs well in pre-test.

Some magazine advertisements are also pre-tested but it is only about half the proportion. A study called "The Pre-Testing of Magazine Ads", commissioned by PPA and conducted by the HPI Research Group [69], revealed that about 60% of TV commercials are tested qualitatively and about 30% are tested quantitatively. By contrast, only about 30% of magazine campaigns are tested qualitatively and about 15% are tested quantitatively.

The study also showed that the prime reason for doing pre-tests in either medium is to provide diagnostic information to improve the creative executions. A secondary reason is to help with the decision on whether the campaign should run at all.

Undoubtedly the effectiveness of magazine advertising could be made even greater than it is if a higher proportion of the ads were tested to ensure they communicate what is intended.

Agency creative people may be confident that a particular ad they have devised will be effective without it needing to be pre-tested. But Gordon and Swan [43] wrote: "Unlike TV ads which have a set sequence of exposure - a beginning, middle and end - which is always constant in order, creators of press ads cannot

control the sequence of reading the ad, nor how long the reader will devote to it. Years of experience in researching press ads point to the fact that creatives nearly always assume that the ad will (a) be noticeable (impactful) because of the creative treatment, and (b) will be comprehensible because of the juxtaposition of headline, visual, copy and so on. Very often this is simply not true." Hence the need for pre-testing. It is an important step in giving oneself the best chance of maximising the effectiveness of the campaign. The potential payback (in terms of communication gain) can far outstrip the cost of the pre-test.

For campaigns where magazines are to be used in conjunction with television, it makes sense to pre-test not only the proposed advertisements for each medium individually, but also to test them jointly to see how they interact with each other in providing enhanced communication.

For a discussion of methods of pre-testing magazine advertisements, see my PPA report "Magazine Advertising Effectiveness", written in 2000 [70].

INITIAL GUIDELINES FOR CREATING EFFECTIVE MAGAZINE ADVERTISEMENTS

Some guidelines for making an effective magazine ad were published by Millward Brown as part of IPC Magazines' "Ad Track" project [44]. These arose from background work conducted when developing Millward Brown's PrintLink pre-test technique, and from hall tests used for assessing the creative execution of more than 20 magazine advertisements covered by the Ad Track survey.

The guidelines start from the proposition that magazines undergo an active reading process, where the reader is in control of what is read. The reader is in effect his or her own editor, scanning the pages to see what is of interest and editing out items that do not strike any chord.

Therefore an advertisement requires something to hook readers in during the initial rapid scanning process. As they scan readers are subconsciously asking themselves "Is this interesting to me? Is it eye-catching? Is it intriguing? Is it relevant?" The main scanning criterion appears to be 'interest'. This could be interest in the product field, or in the product itself. Or it could be interest in something else in the ad.

Millward Brown point out that for a high interest product field or brand the reader is already over the first hurdle. For a lower interest product the ad needs to

draw people in through creative involvement (some eye-catching and intriguing creative device), or by associating the brand with something which is of interest to the reader. For a food product this could be a recipe for instance.

So magazine advertising is fine for low interest products as well as high interest products, but the creative work has to be more imaginative in order to bring about the readers' involvement.

The "Youth Facts 4" survey [17] also had something to say on this subject. In grabbing attention, 'new', 'different' or intriguing images held the most appeal for teenagers. When the teenager goes on to probe for something of interest, if the product itself is not thought relevant then entertainment value will do the job. Entertainment is in itself a sufficient reward for the teenager's investment of time in studying an ad. Having thus become involved in the ad the reader is in a position to digest more detailed information, but the details still need to prove rewarding.

Youth Facts tested 18 advertisements quantitatively and a larger selection qualitatively. This led to a general prescription for creating advertising that appeals to teenagers. EMAP called it The Teen Commandments:

- 1 Don't let them get bored - vary the executions
- 2 Be creative and novel
- 3 Tailor the campaign
- 4 Keep up with the times
- 5 Keep it simple
- 6 Make it fun
- 7 Don't be condescending
- 8 Make sure free gifts are worth having
- 9 Use bold colours
- 10 Don't use teenage clichés

Similar principles, with some adaptation, would apply to other kinds of magazine, but what is unique is the particular form of these Teen Commandments in order to appeal to the teenage market. It's an illustration of one of the advantages of magazines: provided an advertiser uses a suitable interpretation of the campaign, a given type of magazine offers a very special way in to its particular audience.

Youth Facts 4 and Ad Track have clearly demonstrated the active nature of a reader's involvement with an ad, a great strength of the medium. It means readers can take out of an ad everything they wish, for as long as they wish - provided the creative execution persuades them into it. Pre-testing is the way to ensure that it does.

(C) EVIDENCE THAT MAGAZINE ADVERTISING SELLS PRODUCTS

There can be no doubt that magazine advertising is capable of selling products. Hundreds of individual case histories and multi-brand studies exist which show positive sales effects of campaigns centred on magazine advertising. There are also many examples where market research identifies improvements in intermediate measures ranging from awareness to intention to buy - measures which it is reasonable to assume may be connected with subsequent sales.

This section reviews some of the key studies. For an assessment of methods of monitoring the effectiveness of magazine advertising, and a discussion of the principal issues surrounding this complex field, see my PPA report "Magazine Advertising Effectiveness", written in 2000 [70] and downloadable from www.hmaw.net



22. AWARENESS AND PURCHASE CONSIDERATION: IPC'S AD TRACK

Ad Track [44] was an innovative, landmark survey which demonstrated that magazine advertising can generate:

- (a) marked increases in advertising awareness, and
- (b) movements in brand purchase consideration.

WHAT ADTRACK DID

Ad Track was a continuous tracking survey lasting 48 weeks from January to December 1994. IPC Magazines commissioned Millward Brown to conduct 200 interviews per week, or nearly 10,000 interviews in total, among women who had read a magazine in the past year (about 90% of all women). 24 brands advertising in magazines were tracked, and half of these were using television as well. A wide cross-section of product fields were covered.

Two main questions were asked throughout the year:

- 1 Awareness of advertising in magazines (and television where used), for each brand. Awareness is worth measuring because it is evidence that some level of communication is getting through, but awareness is not sufficient in itself. The actual question for magazines was "Thinking about magazines, have you seen any advertising for recently?" If the answer was Yes a follow-up question was "And have you seen advertised in magazines during the last few days?"
- 2 Purchase consideration. The wording was "Which of these would you ever consider buying either for yourself or for others?"

Two of the key innovations of this survey were the introduction of techniques for handling (a) the time-lag in magazine exposures and (b) the over-exposure of some of the magazine advertisement executions.

Magazine exposures do not all occur instantly the issue is published (unlike viewing of TV commercials). Magazine exposures are spread over days, weeks or even months, and this must be taken into account in order to relate ad exposure and advertising effect. In 1990 Millward Brown had conducted a readership survey which established which issue of each magazine had been read, and this allowed an understanding of the way actual exposure to a magazine builds up through time. (This 1990 work is now superseded by the 2004 NRS Readership Accumulation Survey described in section 12.) Telmar developed a computer system called Timeplan which merged this data with National Readership Survey average issue readership data, and modelled the week by week pattern of actual exposures generated by a given magazine campaign.

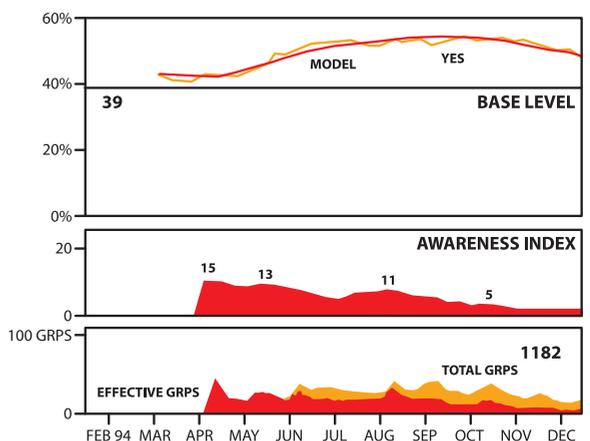
In previous work Millward Brown had found that repeated exposures to the same print advertisement could gradually diminish in their effect, because with print ads - which can be held and studied for as long as the reader wishes - readers can take out the key messages during the early exposures. The solution is to introduce a new creative execution, thus refreshing the stimulation given to readers. Millward Brown's modelling of the Ad Track data took account of the extent to which each magazine campaign introduced new creative treatments.

RESULTS FOR AWARENESS

The Awareness Index measures the percentage increase in awareness per 100 gross rating points. Averaging across all the campaigns, magazine advertising was creating an awareness score of 13% - exactly the same as the television advertising. So magazine ads are as powerful as TV commercials for getting consumers to give attention and thought to brands. On top of this, the magazine exposures are generated at roughly half the cost of the TV exposures.

To illustrate the data produced on individual campaigns, the next chart shows the build in advertising awareness for Kellogg's Common Sense Oat Bran Flakes, which used a mixture of weekly and monthly magazines and three different creative treatments. The level of claimed awareness is shown on the scale down the left and the box at the bottom shows the gross rating points over the year. There is a clear uplift in awareness in April and May which was then sustained over the year. The movement is very clear-cut and can be related directly to the magazine campaign. There was no TV in 1994.

Magazine Ad Awareness Recently
Kellogg's Common Sense Oat Bran Flakes
Base: ABC1 housewives 35-64 - rolling 8 weekly data



Millward Brown's pithy overall summary of the Kellogg's Common Sense Oat Bran Flakes campaign was "Successful campaign producing clear and sustained movements in purchase consideration and advertising awareness".

RESULTS FOR PURCHASE CONSIDERATION

Second, there is the measurement of consumers who would consider buying the advertised products - 'purchase consideration' as this was called.

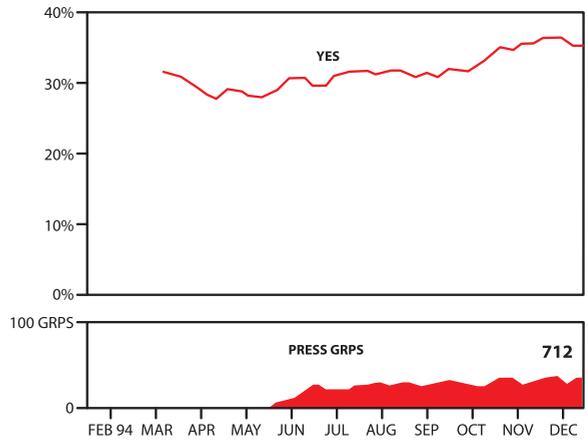
There were 22 brands where it was possible to isolate the effect of magazines. For 15 of these, there was a measurable increase in purchase consideration. 11 of these were magazine-only campaigns and four were mixed-media campaigns using magazines and TV. Of the seven magazine campaigns showing no movement in purchase consideration, five were already running at quite high levels and were therefore very hard to shift upwards.

Six TV-only campaigns had been tracked, and of these only two showed an increase in purchase consideration - though the four others were already running at quite high levels.

These data prove that magazine campaigns can increase people's willingness to consider buying products.

As an example of results for an individual brand, the next chart shows the purchase consideration diagram for Candy Electrical Appliances. Candy used women's weeklies and general and home monthlies, with four creative executions. There was no TV. The graph reveals that as soon as the magazine advertising commenced the percentage of women who would consider buying Candy electrical appliances rose, and the rise continued throughout the campaign.

Consider Buying - Candy Electrical Appliances
Base: All women - rolling 8 weekly data



Millward Brown's overall summary of the Candy Electrical Appliances campaign was "Operating in a relatively low involvement product field, the campaign successfully increased purchase consideration using consistent executional style across the campaign and sustained support".

CONCLUSION

The Ad Track research demonstrated the power of the magazine medium, both in delivering a message about the brand and in influencing purchase decisions. Magazine campaigns can be as successful as TV campaigns - and indeed in some cases can be more effective.

Millward Brown's conclusion was "The movements in purchase consideration (two thirds of brands showing an increase) and the relative magnitude of the awareness response (on average on a par with TV but at a lower cost) should provide confidence to clients and planners that magazines are a genuinely powerful medium."

23. SALES UPLIFT AND ROI : “SALES UNCOVERED”:

We can proceed from awareness and purchase consideration (previous section) to sales and return on investment. “Sales Uncovered” [71], published by PPA in May 2005 and part of a longer project called “Magazines Uncovered” [72], found that magazine advertising was associated with an average sales uplift of 11.6% and produced an impressive 12-month return on investment (ROI) of £2.77.

HOW THE ANALYSIS WAS DONE

The study was an analysis of TNS Superpanel sales records and media exposure data. Superpanel’s 15,000 homes record their take-home purchases via bar-code readers and keypads, on a daily basis. The analysis examined purchasing records during the period August 2002 to February 2004. Panellists’ media exposure was measured through a self-completion questionnaire called mediaSPAN.

20 fmcg brands were selected for analysis according to detailed criteria, including the requirement that magazines accounted for at least 10% of the brand’s total advertising expenditure. The 20 brands were those which met the criteria and which spent the largest amounts on magazines. The cut-off point turned out to be a magazine expenditure of £325,000 or higher.

The NRS readership accumulation data were used for distributing across time, week by week, the exposures generated by each magazine insertion. This meant that a more realistic comparison of week by week exposures and purchases could be made, than in previous studies prior to accumulation data being available.

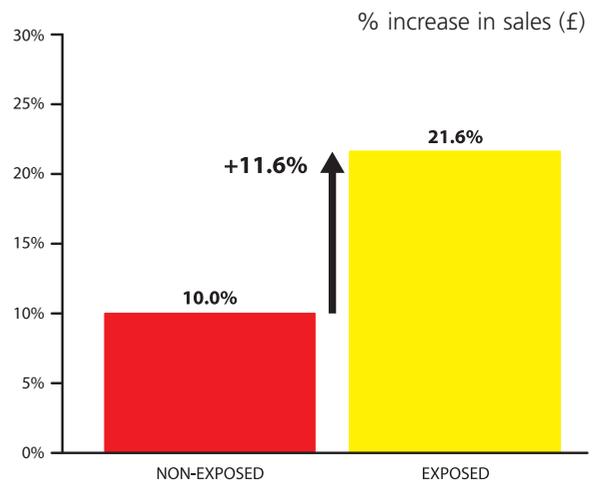
Taking each of the 20 fmcg brands’ campaigns in turn, Superpanel main shoppers were ranked according to the weight of their exposure to the magazine campaign. (A similar ranking was performed on weight of exposure to television advertising if appropriate.) The top 40% of main shoppers were defined as the ‘exposed’ group; in general, they accounted for about 90% of total magazine exposures. The bottom 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.

For each brand, purchases were analysed among the exposed group and the non-exposed control group, for each week during the campaign period, and during an equivalent pre-campaign period. Purchases during the campaign period were then compared with purchases during the pre-campaign period, separately for the exposed and non-exposed group. The analysis was therefore based on tracking the purchases of the same individuals (the exposed group, and the non-exposed control group) through time. External events in the marketplace applied to both groups, and any differences in composition between the two groups were constant through time.

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

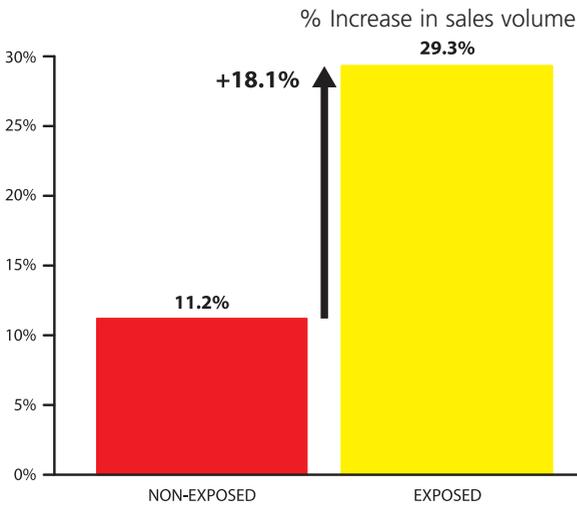
11.6% UPLIFT IN SALES VALUE

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%. Thus the magazine advertising was associated with an extra 11.6% increase in sales (in terms of value).

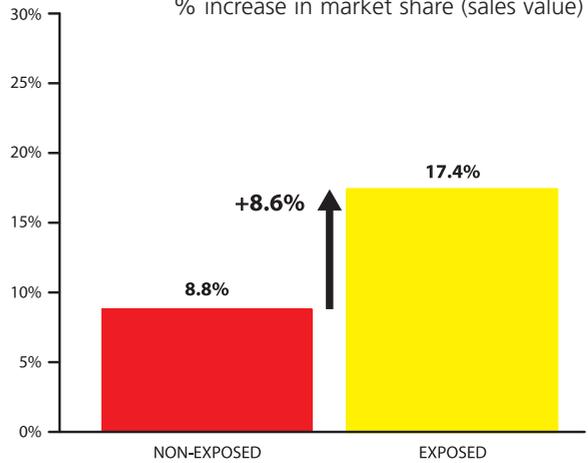


18.1% UPLIFT IN SALES VOLUME

Taking a different criterion of performance: volume sales among the non-exposed group rose by 11.2%, but among the group exposed to magazines it was 29.3%. The uplift from magazines was therefore 18.1%.



% increase in market share (sales value)

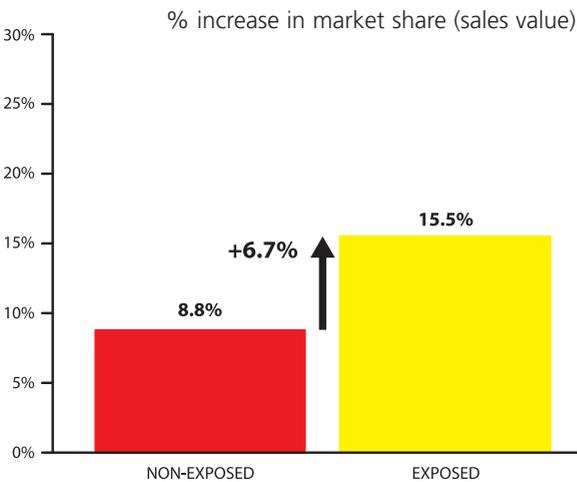


WINNING NEW CUSTOMERS: BRAND PENETRATION AND WEIGHT OF PURCHASE

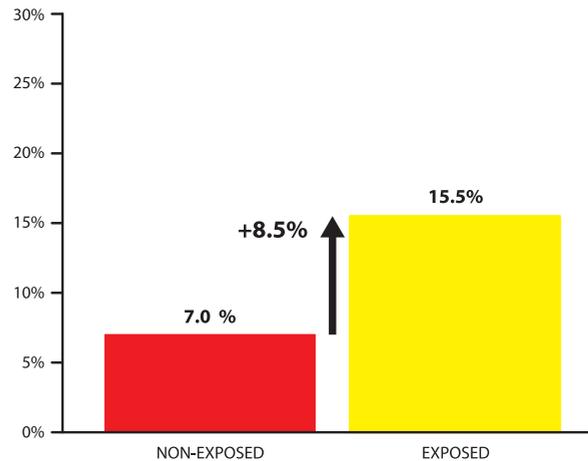
Magazine advertising can win new customers for a brand, and at the same time increase the average weekly weight of purchase. Across the 20 brands, brand penetration of the market rose by 7.0% in the campaign period among people not exposed to magazine advertising, but rose by 15.5% among those who had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

UPLIFT IN MARKET SHARE

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.



% Increase In Brand Penetration



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: RETURN ON INVESTMENT OF £2.77

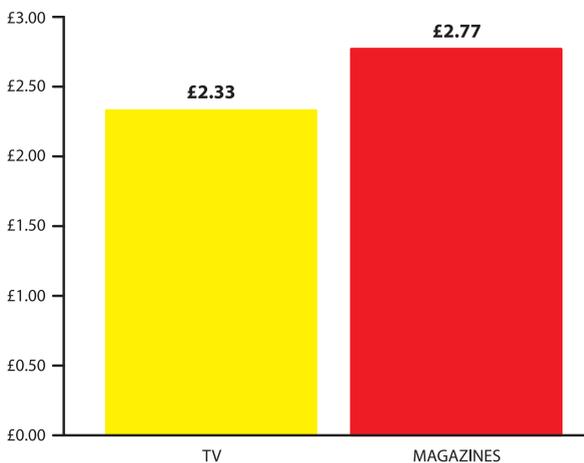
A prime measure of accountability is return on investment (ROI): does the advertising produce more revenue than was spent on it, and if so, how much more? TNS were able to make estimates of the return on investment for each campaign.

One estimate was of the ROI for the campaign period. This represented the value of the incremental sales generated while the magazine advertising was running. For the 20 brands combined, the average ROI was a creditable £1.79. This however is only part of the story, for the effect of advertising lasts far beyond the campaign period. The ROI across 12 months from the start of the campaign is a more realistic assessment, and may be regarded as the medium-term ROI.

The 12-month ROI takes into account the repeat purchasing of the brand from those buyers who were persuaded by the magazine advertising to buy the product during the campaign. 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, magazines' figure of £2.77 can be set beside the figure of £2.33 for television advertising, also based on Superpanel data and calculated by TNS [73].

ROI For Magazine And TV Advertising



TNS' 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 is at least as good as that of television advertising.

SUMMARY

"Sales Uncovered" has uncovered the following conclusions:

- Magazine advertising was associated with an additional sales uplift of 11.6%, in terms of sales value
- The uplift in terms of sales volume was 18.1%
- There was an uplift in market share (sales value) of 6.7%
- The uplift in market share (sales volume) was 8.6%
- Market penetration increased by an extra 8.5% after exposure to magazine advertising
- Average weekly weight of purchase rose by an additional 1.6%
- The medium term return on investment for magazine advertising was £2.77 – at least comparable with that of television advertising

Further conclusions from "Sales Uncovered" concerned magazines' share of the total advertising budget; magazines used in conjunction with sales promotions; and magazines' performance in mixed-media schedules. These aspects are dealt with in later sections of this report.

"PROOF OF PERFORMANCE" I & II

Instructively, the 11.6% sales uplift shown by "Sales Uncovered" was closely mirrored by PPA's two earlier studies using the TNS Superpanel, "Proof of Performance" I & II [74, 75]. The first report was published in 1997 and the second in 1998, and both demonstrated that magazine advertising increased short-term sales by 11%. A summary of both studies can be found on www.hmaw.net

24. MORE CASE HISTORY EVIDENCE THAT MAGAZINE ADVERTISING SELLS

UK EVIDENCE

There is a great deal of further UK evidence showing that magazine-only campaigns can sell products and services. Many publishers and other organisations have been issuing case history material for years, demonstrating the sales effectiveness of magazine advertising. Several sources have produced collections of case histories, and these are particularly valuable in showing that the sales power of magazines is a widespread and general phenomenon applicable to all kinds of products and services, and not confined to special situations. Some of it is summarised on the www.hmaw.net website, including:

- PPA's '52 Reasons Why Magazines Make Things Happen' [76]
- IPC Media's analyses of TNS Superpanel data [77]
- IPC Media's 1998 collection of 19 case histories under the title 'How Magazines Work' [78]
- IPA's Advertising Effectiveness Awards, whose entries are held available in a databank [79], and whose winning entries are published in the 'Advertising Works' series of books [80].

PPA's website www.ppamarketing.net also has a rich array of research material.

INTERNATIONAL EVIDENCE

As with the UK, many other countries have published impressive case history evidence that magazine advertising can sell products and services. Much of this is available through the websites of individual publishers and of national associations (such as the Magazine Publishers of America's www.magazine.org; or Germany's www.pz-online.de from VDZ Verband Deutscher Zeitschriftenverleger).

One of the studies from Magazine Publishers of America (MPA) is summarised below as an example:

Nielsen Sales Scan

MPA commissioned A C Nielsen to use their 50,000 Household Scanner Panel to examine the impact of ten magazine campaigns running in the second quarter of 1998 in the USA. The purchases made by

households exposed to magazines carrying the ads were compared with purchases by demographically matched households not exposed to those magazines.

Of the households that were exposed to magazines:

- A higher percentage bought the advertised product (for 9 of the 10 products)
- The volume of purchases per household was greater (for 8 of the 10 products)
- The absolute sums of money spent were greater (for 8 of the 10 products)

The MPA concluded that the "findings clearly demonstrate that increased magazine weight results in increased sales for advertisers". The full results were published by MPA in 1999 in a detailed report called "Sales Scan" [81].

FIPP

A substantial single source of information from countries around the world is FIPP, the International Federation of the Periodical Press. FIPP, headquartered in London, represents magazine publishers from almost 100 countries. FIPP published in May 1999 a report by Alan Smith called "Take A Fresh Look At Print" [82] which provided a synopsis of about 20 research studies worldwide which investigated the effectiveness of print advertising (newspapers as well as magazines) when used on its own and in conjunction with television. In 2002 a second edition was published [83], introducing further studies and analyses. Together, this body of research underlines the benefits of creative synergy, enhanced communication and better targeting, resulting in improved return on investment. Both of the "Take A Fresh Look At Print" reports may be downloaded from FIPP's website.

The FIPP website's Research section (which I edit) presents a growing collection of summaries of significant research studies from around the world. Visit www.fipp.com/research. There is also a quarterly electronic newsletter, Global Research Update, which presents summaries of some of the latest research studies. To receive the newsletter, free, sign up at www.fipp.com/newsletter.asp

(D) CHANNEL PLANNING:

POSITIONING MAGAZINES WITHIN THE TOTAL MEDIA LANDSCAPE

25. 'CHANNEL PLANNING' REPRESENTS A FRESH PERSPECTIVE

The last few years have seen a progressive change in media planning. Instead of focusing only on the traditional media such as television, magazines, newspapers, radio and outdoor, a much wider range of channels of communication is being considered. This shift in perspective has been prompted by the arrival of new digital media – the internet, digital television and radio channels, emails, text messaging and so on. The new media have elbowed traditional media into a fresh position in certain respects, forcing the old to adjust to the new. The old ways of thinking about media have been jolted, and in the process of embracing the new media, the new outlook has expanded to take in other long-established methods of communication which were traditionally outside the media planners' sphere. The landscape has come to look different.

Thus the planning scene now includes brand experiences in a great variety of places: at the point of sale (such as promotions or product-tasting in supermarkets, or advertising in showrooms), at the point of consumption (e.g. branding on the cups in which your cappuccino is served, or advertising on beer mats), sponsorship (sports events, television programmes, magazine supplements, garden shows) and even informal exposures such as word-of-mouth among friends or advice given by sales people. All of these are contact points between people and brands which the marketer can influence, sometimes directly and sometimes indirectly.

The new perspective has brought about a change in vocabulary. While the term 'media' is elastic enough to embrace such things as sponsorship, point of sale promotion and text messaging, the term 'channel' is favoured because it is a different word and thus symbolises the shift in emphasis. As far as the dictionary is concerned, 'media' is exactly the same thing as 'channels of communication', but in current usage 'media planning' and 'channel planning' carry different symbolic overtones.

There are other shifts in outlook associated with channel planning. The discipline talks of 'media neutral' assessment of all the channels, giving the non-conventional media an even chance against the traditional ones. What is being planned is 'communication' rather than 'advertising', since

communication is a wider term which includes promotions, sponsorship and so on, whereas advertising is interpreted as being narrower.

The talk is also of a 'consumer-centric' attitude, to emphasise that the starting point is the consumer and how she or he experiences all the communication channels. Of course, the old media planning that was done for decades (as when I was an agency media group head) was also supposed to be consumer-centric, but the term today is used to stress the fact of additional channels being brought into deliberate consideration.

Thus the core image is of people shopping while surrounded by a vast array of brand experiences swimming in their heads. These include the prompts physically in front of them – the branded products themselves, the shelf-talkers, in-store promotions, and so forth – but also much more than this. They include emails, text messages, telemarketing, direct mail, books, directories, conversations with friends, previous experience of the brands, etc - as well as the advertising seen on television, internet, cinema and posters, in newspapers and magazines, and heard on radio. All these exposures leave some trace in consumers' minds, which may play a part in influencing brand choice at the point of purchase. And marketers' promotional activities can be planned so as to affect (directly or indirectly) any of these contact points between people and brands.

To do this, the pathways to purchase are being researched with growing intensity. What are the functional and emotional triggers which prompt a decision to buy? What is the process of investigating, evaluating and locating products? How does the decision-maker's mindset change during the process? And which channels of communication impinge at each stage? The answers are likely to be different for different categories of product.

So today one talks of consumer-centric media-neutral planning of the channels of communication. For once, a change in vocabulary really is associated with a change in thinking. As Sheila Byfield of Mindshare has expressed it [84], "we need to think of communication opportunities as every point where people can potentially meet brands".

In the new situation it is also the case that intrusiveness is not as desirable or effective as it was once considered. Instead of advertisements bludgeoning their way into consumers' minds, consumers are more likely to choose their media experiences selectively, because of the growth in the media options available to them. Engagement and involvement are key. The Chartered Institute of Marketing wrote in 2004 [85] "We need to enter the age of consent across the media spectrum. This will involve a shift from a model of intrusion to one of communication and building relationships through collaboration... The key to this is consent – doing things on customers' terms, when they want it, where they want it and how they want it."

The effect of the channel planning perspective can be seen in the number of channels used by the winning campaigns in the IPA's biennial Advertising Effectiveness Awards. In 1998 the winning campaigns used an average of 3.9 channels. In 2000 this rose to 4.0, and in 2002 to 4.3. In the 2004 Awards it accelerated to an average of 6.7 channels [86]. There is a clear movement towards using more channels of communication.



26. INTEGRATED COMMUNICATION: THE RESEARCH NEEDS

This leads inevitably to demands for new types of audience research. Planning an integrated communication strategy across all channels requires comparisons of exposure and involvement for each channel – but the necessary integrated research does not yet exist.

The traditional major media are measured separately, using different definitions of exposure, and thus they are not comparable. For example, BARB minute-by-minute television ratings are not the same thing as RAJAR radio ratings, and neither of them equate to circulation figures from ABC or average-issue readership figures from the National Readership Survey. The new medium of the internet has quickly yielded audience figures, but page impressions, unique visitors, click-throughs and the other statistics mean quite different things from other media's exposure data. This is perfectly understandable and natural, for each of these currencies has been specially designed to reflect the way each individual medium works. From the perspective of channel planning, however, it is not good enough. Something needs to be done to create data that are comparable across these media.

Other problems are that many channels are not measured at all, and for all media insufficient account is taken of qualitative factors affecting the nature of the exposures.

Consequently the view is gaining ground that conventional measures of opportunity to see or hear are more restrictive than previously considered, and that it is insufficient to plan media on the basis of gross rating points, costs per thousand, and reach and frequency (though these remain important). What should gain in relevance are measures of engagement and involvement with the medium and the messages they carry.

The solution is some form of holistic research which covers all the most significant channels and at the same time draws upon the established single-medium currencies. Some of the larger advertising/media agencies, and at least one major research company, have developed their own proprietary systems, exclusive to their own clients. Of particular interest is the IPA's TouchPoints project.

IPA TOUCHPOINTS

TouchPoints [87] has been set up by the Institute of Practitioners in Advertising (IPA), together with a number of founding partners representing single-medium currencies and certain media owners. It is a 'hub' survey leading towards a massive multi-channel integrated database. After piloting in 2004, the main fieldwork began in March 2005, and the eventual database is due for completion by the end of 2005.

The fieldwork, conducted by TNS, consists of an initial contact questionnaire collecting basic exposure data on a wide range of traditional and new media, and a diary panel of 5,000 respondents who record all their channel exposure, in half-hour segments, for seven days. The recording is done on a PDA hand-held computer which respondents keep with them throughout the week.

The purpose of this is not only to provide new data and fresh insights, but also to act as a hub into which other currencies can be integrated. These will include the National Readership Survey, BARB television data, JICREG regional newspaper readership, RAJAR radio audiences, CAA cinema figures, POSTAR outdoor estimates, and a host of proprietary surveys. The output will represent a single-source media contact survey, covering a large number of communication channels. The complex business of integrating these sources (conducted by RSMB) will take more than six months.

BMRB'S 'COMPOSE': 26 CHANNELS

A further indication of the range of channels coming into play can be seen in BMRB's multi-channel survey called Compose [88]. Launched at the beginning of 2005, it is based on re-interviewing TGI respondents, and it collected information on attitudes and traits for individual product categories and no less than 26 communication channels.

The channels, shown in the table, include the usual mainstream advertising media which have been measured by long-established traditional currencies, but the list of other channels makes interesting reading.

Compose: 26 channels measured

Measured by traditional currencies

Cinema advertising
 Customer magazines
 Magazine advertising
 National newspaper advertising

Posters & outdoor advertising
 Radio advertising
 Regional newspaper advertising
 Television advertising

Other channels

Brand & company websites
 Emails
 Examining products in-store
 Exhibitions & trade shows
 Free samples
 Information from call-centres/helplines
 Inserts in newspapers/magazines
 In-store materials and displays
 Interactive TV advertising

Internet advertising (e.g. banners)
 Mailings & letters
 Recommendations
 Reviews in the media
 Special offers, coupons
 Sponsorship (events, teams)
 Text messages
 TV direct sales
 TV programme sponsorship

Compose allows subscribers to examine each channel in terms of its traits. The six traits most strongly associated with magazine advertising ('very good' or 'quite good' at) were:

1. Giving you information or ideas about new brands
2. Getting messages across if only seen once or twice
3. Prompting you to take action (e.g. store visit, seek information)
4. Helping you understand everything a brand offers you
5. Often the first way you hear about new things
6. Conveying whether a product/brand is good value

A simple illustration of what a single publication can do to show magazines' role among other media is provided by IPC Media's Now magazine. In the "Leisure Interests Study" conducted in 2001 by Linda Jones & Partners [89], readers of Now were asked about usual sources of health advice and beauty ideas, covering a wide range of channels of communication. The channels included relatives/friends, and professionals such as advisers at beauty counters in stores, and doctors.

The best use of this kind of information comes from comparing different channels in order to show the relative strengths and weaknesses of each, and thus how a certain combination of channels creates the most effective communication among a defined target audience.

Usual sources of health advice and beauty ideas

Sources cited by 30% or more of sample

HEALTH ADVICE:		BEAUTY IDEAS:	
Magazines	82%	Magazines	86%
TV	40%	TV	34%
Relatives/friends	39%	Beauty counter	31%
Doctor	34%	Relatives/friends	30%

IMPLICATIONS FOR MAGAZINE PUBLISHERS

This is the type of research landscape in which magazine publishers will progressively find themselves. It will be increasingly necessary to demonstrate how various channels can work together, complementing each other, and where magazines fit in. Magazines' unique contribution in the media mix must be spelt out ever more clearly. The effectiveness of magazine advertising when used with other media, and the return on investment, need to be brought home.

For information on health, and also on beauty, only four channels of communication were cited by 30% or more of the sample. Magazines were the prime source for both types of information, mentioned by 82% and 86%, more than twice the percentages choosing the second-ranked source, in each case TV. It is noteworthy that relatives and friends were a much less used source of advice and ideas than magazines, among these readers. Similarly the relevant professionals were used much less too - doctors (for health advice) and beauty counters (for beauty ideas).

There is also heightened demand for combining data on physical ad exposure with measures of engagement with the ads. Magazines perform very well in terms of engagement, as already shown, but it needs fresh emphasis from publishers.

27. ATTITUDES TO MEDIA: INFORMATION CONTENT AND TAILORING TO USERS' NEEDS

It is the differences between media which point up the advantages of combining media in advertising campaigns.

One of the prime UK sources is the "Absorbing Media" survey published in 2002 by PPA and conducted by NFO WorldGroup [27, 28]. The survey was designed to include the internet and assess how it is now fitting into the lives of users, as well as looking at five established media.

People are consciously striving to make a balanced and sensible use of the expanding and evolving media menu, while at the same time seeking to remain in control. The established main media continue to dominate consumption, but many people are also trying the new communication channels.

People's perceptions placed magazines ahead of other media in terms of interesting information content and being tailored to users' individual needs.

"Absorbing Media" respondents were shown a list of statements and asked to say to which media each statement applied. Magazines emerged as the medium that was most widely thought to contain information that was of most interest. Newspapers ranked second, and television third, but some way behind magazines.

Magazines also scored in terms of being tailored to meet the individual's needs, where it was well ahead of the other five media.

"It is usually tailored to meet my individual needs"

	% agreeing it applies
Magazines	35 %
Newspapers	21 %
Newspaper supplements	10 %
Commercial TV	20 %
Commercial radio	7 %
Websites	17 %

Base: All aged 15+

These elements of personalisation and consistent depth of interest are characteristics that help make magazines a suitable complement to television with its own well-known contrasting strengths.

"It contains information that I am most interested in"

	% agreeing it applies
Magazines	45 %
Newspapers	36 %
Newspaper supplements	17 %
Commercial TV	30 %
Commercial radio	8 %
Websites	24 %

Base: All aged 15+

28. ATTITUDES TO THE ADVERTISING IN EACH MEDIUM

Most of the attitude statements in "Absorbing Media" concerned advertising in each of the six media. Although many people have a generally negative attitude to advertising, the results consistently showed that advertising in magazines is seen more positively than in other media.

Advertising in magazines was seen as more relevant than in other media (television ranked second at some distance behind), and as being more helpful as a buying guide (television and newspapers coming second). Advertising in magazines and television was more trusted and believed than advertising seen elsewhere. People felt they were more likely to pay attention to an advertisement if they saw it in their favourite magazine or television programme. Magazine advertising led in

terms of helping people decide between two similar products they were considering purchasing.

Turning to negative aspects, television stood out as being the medium creating the most unfavourable attitudes towards its advertising. Just over half of viewers said they often find the advertising annoying. Almost 40% felt that the commercials were too intrusive and that, overall, the medium is the worse for them.

Commercial radio and websites also came out poorly in terms of these unfavourable attitudes. In contrast, the three forms of print media – magazines, newspapers and newspaper supplements - fared much better, with relatively low levels of negative comment.

ATTITUDES TO THE ADVERTISING IN EACH MEDIUM

"This medium has advertising that I find relevant"

	% agreeing it applies
Magazines	34 %
Newspapers	18 %
Newspaper supplements	9 %
Commercial TV	23 %
Commercial radio	5 %
Websites	10 %

"Advertising in this medium is helpful as a buying guide"

	% agreeing it applies
Magazines	35 %
Newspapers	22 %
Newspaper supplements	13 %
Commercial TV	24 %
Commercial radio	6 %
Websites	14 %

"I can usually trust and believe the advertising"

	% agreeing it applies
Magazines	23 %
Newspapers	17 %
Newspaper supplements	10 %
Commercial TV	22 %
Commercial radio	8 %
Websites	7 %

"I'm more likely to pay attention to an advertisement if it appears in/on one of my favourite ..."

	% agreeing it applies
Magazines	30 %
Newspapers	14 %
Newspaper supplements	7 %
Commercial TV	28 %
Commercial radio	6 %
Websites	6 %

"The advertising can help me decide between two similar products that I'm considering purchasing"

	% agreeing it applies
Magazines	28 %
Newspapers	15 %
Newspaper supplements	9 %
Commercial TV	21 %
Commercial radio	4 %
Websites	9 %

"I often find the advertising annoying"

	% agreeing it applies
Magazines	10 %
Newspapers	11 %
Newspaper supplements	9 %
Commercial TV	51 %
Commercial radio	23 %
Websites	18 %

Base: All aged 15+

Source: Absorbing Media, 2002

Advertising on websites, which the survey probed in further detail, can sometimes be a problem to users. Still in its infancy, it simply seems to get on people's nerves. Banner ads are one thing, but pop-ups ads really do wind people up. 81% of respondents agreed that "It is irritating when adverts pop up unexpectedly". People are also annoyed by movement and flashing in online ads.

Overall, web advertising is disliked because of its intrusive nature, which runs strongly counter to one of the principal consumer benefits of the medium: control by the user. Moreover the extra time taken up by advertisements adds to the slight sense of guilt some surfers feel about the time they spend accessing websites.

29. OTHER ACTIVITIES WHILE USING MEDIA

Because different media are used in different ways for different reasons and in different situations, the nature and degree of attention varies substantially from medium to medium.

People do not always consume media in isolation. There is often a lot going on around them at the moment of media exposure. Sometimes one medium is employed only in a supporting role. Two media are often used together. All this has a marked bearing on how well media content is received and digested.

The "Absorbing Media" survey investigated some of the other activities which were going on while consumers were using each of the six media. As the next table

shows, all six media are used amid considerable other activities, including exposure to other media. (The table should be read vertically.)

Television viewers are particularly prone to temporarily focus on other things when the commercials come on, because viewers are not in control of how long the advertisements run. Only 29% watch the commercial 'nearly all or a lot of the time'. Otherwise they are switching channels (26% do this 'nearly all or a lot of the time'), talking to someone in the room or on the phone (31%), being distracted by something else (28%), or leave the room temporarily (21%). If they are watching a video-recorded programme, 69% fast forward through the commercials.

Activities done 'Nearly all/a lot of the time' while using each medium

Activity	Magazine %	Newspaper %	Supplement %	TV %	Radio with ads %	Website %
Read magazine				11	15	3
Read newspaper				9	13	1
Read newspaper supplement				6	9	2
Watch TV	22	23	21		7	4
Listen to commercial radio	15	13	11	4		7
Look at websites	5	3	3	3	5	
Talk, in room or on phone	22	19	18	22	23	17
Do household chores				18	29	
Drive					41	

Source: *Absorbing Media*, 2002.

Base: 12+ respondents who use the medium

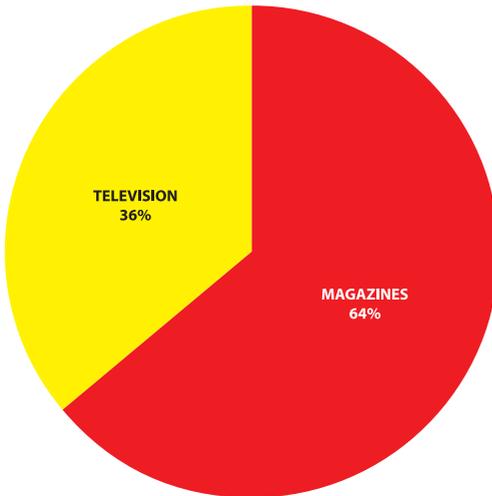


SHARE OF ATTENTION

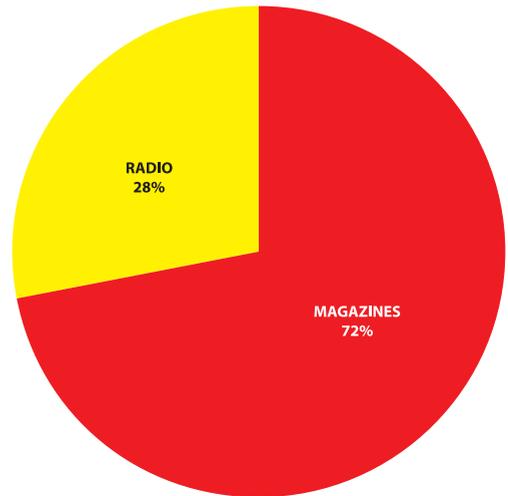
What happens when people use two media simultaneously – which medium attracts the main

attention? The Belgian “MediaTime Study” of 2002 [90] showed that where magazines, television and radio are concerned, it is magazines to which attention is chiefly devoted.

Share Of Attention: Magazines And Television



Share Of Attention: Magazines And Radio



This makes sense. Television and radio are media which can be received passively, allowing them to wash over the viewer or listener, who may remain mentally switched off or just in ‘monitoring’ mode. Magazines

require attention, because the reader must actively use his or her brain to scan the pages, select what to read, and read it.

30. ACTIONS TAKEN

All media are regarded as sources of ideas and triggers for consumer action. High proportions of users of each media channel readily admit that they have taken action as a result of something they have seen or heard on their chosen medium. However some media are more effective in this respect than others. Magazines and websites are particularly action-oriented, as the next table indicates.

In terms of picking up ideas, following advice and trying something for the first time, magazines lead the way –

though they are closely followed by websites and television. 68% of magazine readers said they have picked up ideas from their publications; 43% said they have followed some advice given, and 36% have tried something for the first time.

When it comes to purchasing products and services, magazines and websites perform substantially better than other media. 43% of website users and 41% of magazine readers said they have bought something as a result of their surfing or magazine reading.

Action taken as a result of exposure to ...

Action	Magazine %	Newspaper %	Supplement %	TV %	Radio with ads %	Website %
Picked up ideas	68	50	52	62	33	60
Followed some advice given	43	35	30	35	24	37
Tried something for first time	36	23	24	33	16	32
Bought something	41	29	26	28	16	43
Any of these	87	78	75	83	58	86

Source: *Absorbing Media*, 2002.

Base: 12+ respondents who use the medium

31. MAGAZINES FOR COURTSHIP

The broad findings from “Absorbing Media” are not just a UK phenomenon but are universal, arising from the nature of the media. Similar results have been reported in other countries. One example is “Media Choices”, conducted in 2000 by Erdos & Morgan for Magazine Publishers of America [91]. Another example is an Australian study called “Courting the Consumer” [92], published by Magazine Publishers of Australia. It was based on a combination of qualitative research (focus groups) and a quantitative survey using a sample of 1617 adults.

The Australian survey concluded that magazines are the medium of courtship, bringing people closer to things of interest. Magazines come alongside and build familiarity for the products advertised in them. Television is the medium of introduction, with its intrusiveness making it good for attracting attention and maintaining visibility. Radio plays the role of invisible companion, and newspapers are the medium of ‘plugging in’, taking readers behind the summary details that appear on TV.

The survey described how magazines, television, radio and newspapers perform different roles, and the mindset a consumer brings to each medium acts as a filter, affecting how advertising works. The MPA report states that while “TV is the passive entertainment medium for introduction and visibility boosting, magazines are the active involvement medium for the courtship stages of building familiarity and preference. Together they perform complementary roles in the consumer’s decision-making process - one adds power to the other.”

The research showed that magazine advertising is part of the environment a consumer consciously explores in search of things of interest. The advertising is not just about getting ‘hard’ information, but is also about getting to know brands and products, by seeing them in an environment where they can be looked at, revisited and compared. The statements concerning advertising in magazines which attracted the highest levels of agreement from the sample were ‘The ads help me compare the choices available’ and ‘The ads contain useful product information’. The advertising plays an intimate role, coming alongside consumers when they are deciding which products and brands best fit their individual needs. This is why the MPA called magazines the medium of courtship.

Respondents were asked in which of the four media they first find out about new products, for each of ten product fields. In half the product fields TV was the leading medium, and magazines were the leading medium in all but one of the remaining product fields. When they were not top-scoring, TV and magazines were usually in second place. Respondents were next asked which medium was best at providing information needed to decide what to buy. Magazines were the dominant medium, leading in six of the ten product fields and coming second in all but one of the remainder. Magazines were also the dominant medium in terms of the best source of information and ideas. Moreover this dominance was accentuated among consumers who were ‘very interested’ in the product field. Thus magazines allow an advertiser to focus a message on the very people who are most interested in what the advertiser has to say.

32. MEDIA EXPERIENCE STUDY: IDENTIFYING MAGAZINE ATTRIBUTES

Another survey from abroad which throws light on the varying ways in which the principal media channels work is the 2004 "Media Experience Study" (Mediabeleving 2004) published in The Netherlands [93]. By comparing a range of media it underlined some of magazines' strongest attributes: readers' identification with their favourite titles, enjoyment, stimulating information of a practical nature, and advertising that provides new, clear and useful information that is believable.

The study, conducted by research agency Veldkamp/TNS NIPO and published by newspaper publishers' trade association Cebuco, interviewed a representative sample of 1,000 people aged 13 and over. Respondents were shown a list of eight dimensions, and asked to say which dimensions applied to the various media they used.

EXPERIENCING THE MEDIA

The summary table shows the ranking of each medium, on each dimension. The table should be read horizontally.

THE MEDIA	Magazines	Newsppp	Free pp	Internet	TV	Radio	Cinema	D Mail
Information	2	1	4	3	5=	7	8	5=
Enjoyment	3	6	7	5	4	2	1	8
Negative emotions	5=	1	3=	7=	2	5=	7=	3=
Leisure/pastime	2	3	1	6=	4=	4=	8	6=
Stimulant	2	5	7=	3	4	6	1	7=
Identification	1	3	7	4=	2	8	4=	6
Social interaction	4	2	5=	7	3	8	1	5=
Practical usage	2	5	3	1	7=	6	7=	4

Newsppp=Newspapers, paid-for. Free pp= free newspapers. D Mail=direct mail/commercial post

Among eight media, magazines were ranked first or second on five out of eight dimensions: identification, information, stimulation, practical usage, and leisure/pastime.

The internet has rapidly established itself within the mix of media. It achieved top ranking in terms of practical usage, just ahead of magazines, and ranked third on information and stimulation (in both cases just behind magazines). The table reveals the relative strengths and weaknesses of all nine channels.

EXPERIENCING THE ADVERTISING

In a second part of the study a different set of ten dimensions was shown, and respondents said which

applied to the advertising in the media they used. The next table presents the ranking of the advertising in each medium (with outdoor added to the list), on each dimension.

ADVERTISING	Magazines	Newsppp	Free pp	Internet	TV	Radio	Cinema	DMail	Outdr
Something new	1	3	5	2	9	6	8	4	7
Useful information	2	3	1	6	9	8	5	4	7
Believable	1	4	2	5	8=	6	8=	3	7
Happy	2	4=	8	9	3	7	4=	6	1
Did not irritate me	4	3	1	7	9	8	6	5	2
Clear	3	6	1=	1=	8	7	4	5	9
Enthusiastic	3	1	4	5	7	8	9	2	6
Original/unique	3	5=	8	5=	5=	4	1	9	2
Felt involved	6	2=	1	2=	8	7	9	5	4
Action	5	2	1	4	7	8=	8=	3	6

Newsppp=Newspapers, paid-for. Free pp= free newspapers. D Mail=direct mail/commercial post. Outdr=Outdoor

Magazine advertising was ranked first in terms of 'something new' and 'believable'. It was ranked second on 'useful information' and 'happy'. It came third in terms of 'clear', 'enthusiastic' and 'original/unique'. Thus magazines were ranked in the first three positions for seven out of ten dimensions.

Again the internet achieved some high ranking positions. It was first equal with free newspapers in terms of clarity, and ranked second (behind magazines) for 'something new', and second equal with paid-for newspapers for 'felt involved'.

It is notable that television performed badly on most of

the dimensions. The one exception was its third ranking on 'happy'. Television emerged as the medium with the most irritating advertising, and advertising which is the least useful, new or believable. Television advertising was also among the least clear, and aroused some of the lowest enthusiasm, involvement and action.

Clearly, magazines have many positive attributes which enable them to contribute something valuable and unique within a multi-channel marketing campaign.

33. MAGAZINES AND THE INTERNET

THE WEBSITE EXPERIENCE

The “Absorbing Media” research, in both its qualitative and quantitative stages, probed into the experience of using websites. While the internet has clearly made a huge impact, it is perceived as two distinct media: a communication channel (e-mail and chat rooms) and an information channel (websites).

While it is well accepted that websites have an immense array of valuable and interesting information, the survey found a widespread concern among people about the impact on them as individuals. Surfing websites is seen by many people as a rather lonely, antisocial and intense activity. They also complain that it is expensive and sometimes frustrating. Some people view websites as addictive, time-consuming and in danger of taking over their lives without firm rationing. The web experience is not treasured in the same way as the magazine experience. Instead it is characterised by a relative lack of relationship with the medium. In response to a series of attitude statements, 45% agreed that “using the web is a lonely unsociable activity”, 34% agreed that “I feel a certain amount of stress when I use the web”, and 26% agreed “the web takes up too much time”. To the statement “I have a relationship with the web, like a friend”, 74% disagreed.

This is of course offset by the strong positives of the web. The medium is becoming an empowering revolution for consumers. With an incredible encyclopaedic knowledge available at one’s fingertips, the quest for information can become an adventure. 85% of respondents agreed with the statement that “I can find almost any information I need on the web”. The web has given individuals a sense of control. And this factor of control links back to magazines and other print media.

The web has joined print as a second major medium which allows users full control of their exposure (except for the pop-up ads). This embraces control of both what is looked at and the time spent on it.

“Absorbing Media” has shown that consumers’ experience of the web has led them to perceive the traditional media channels in a new light. In particular, respondents pointed out how they appreciate the selection, screening and mental editing which magazines offer them.

MAGAZINES AND WEB CROSS-REFERENCING EACH OTHER

The internet is like print in that it is under the control of the consumer rather than of the publisher/broadcaster. The two channels can work well together because they can cross-

reference each other.

Magazines can arouse interest in topics, suggest information sources for readers to explore, and provide website addresses in articles and advertisements. The internet is such a wide open bottomless uncharted and invisible world that the editing function which magazines can provide – reviewing a topic and suggesting avenues for further exploration – can be a very valuable one. Magazines’ own websites can be a useful part of such referrals, but in most cases they won’t be the main online sources.

A new if modest piece of research illustrates one type of interaction between the channels. An American study released in November 2004 by research agencies Ipsos-Insight and Faulkner Focus [94] showed a close relationship building up between print and online advertising. The two media work together as natural companions. For example, it was found that information in print had sometimes led directly to an online search, which in turn sometimes led to purchase. Thus one respondent saw a print ad for a cell-phone plan, then went online to the advertiser’s website for further details, and finally went out to a shop and made a purchase. A symbiotic relationship was found between print and the internet.

It is clear that advertisers should, where relevant, include their online address in their print ads, and that the online advertising should consciously tie in with the print advertising. Information on the website which relates to products featured in print ads should be easy and quick to find on the site, when readers visit from the printed page.

DIGITAL MAGAZINES AND THE INTERNET

The way in which magazine advertising drives readers to advertisers’ websites is even more marked for the digital editions of magazines, because of the easy hyperlinks. Digital editions are exact reproductions of the printed magazine, but held digitally, distributed electronically, and usually read or at least scanned on the screen, with the user choosing which if any pages to print out or to store digitally. One key difference from the printed magazine is that the digital editions include many hyperlinks to websites, embedded in the editorial and in the ads, thus giving immediate accessibility to advertisers’ websites. Although only a small proportion of consumer magazines have digital editions in 2005, the trend is clearly sharply upwards.

Mosaic Media Partners and 101 Communications published in April 2005 an internet-based survey among American subscribers to digital magazines [95]. The subscribers had similar demographic profiles to their print counterparts, were happy with digital publishing formats, and became highly involved with editorial and advertising content.

The most popular of a list of features of digital editions was the ability to instantaneously link to an advertiser's website. 64% of respondents said they had linked to vendor websites directly from articles, and 43% had linked to vendor websites directly from ads.

Other popular features included the ability to search articles (55%), links to 'white papers' (55%), archiving digital editions or articles (37%), and the ability to send a single article or ad to a colleague (29%). 22% of digital edition subscribers said they had forwarded an ad to a colleague, while 37% said they had forwarded information about a vendor.

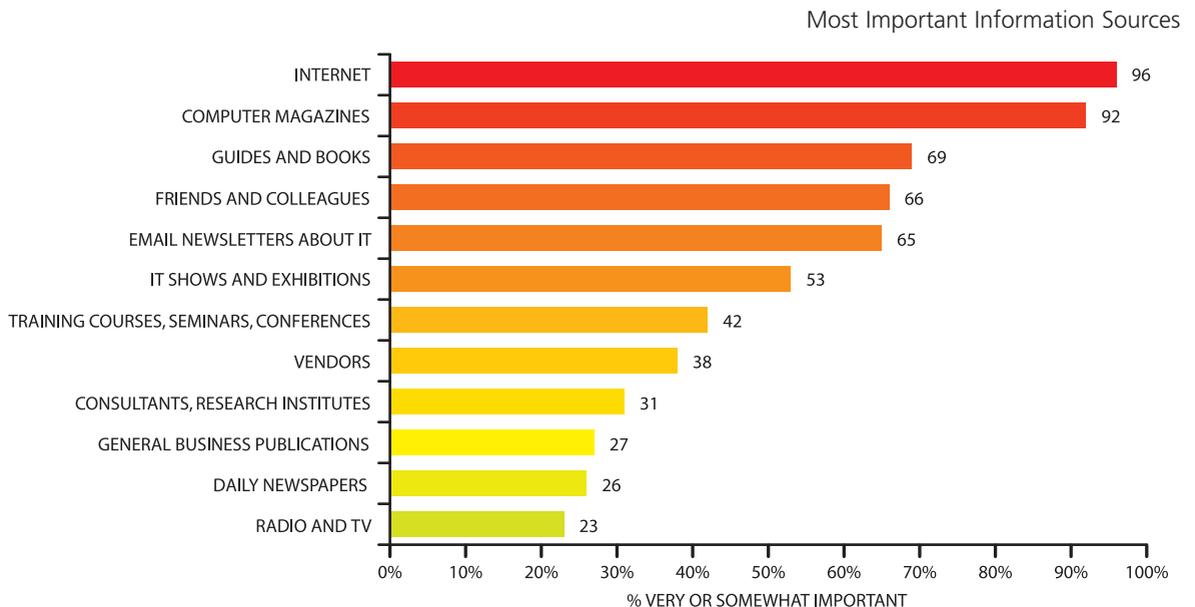
SOURCES OF INFORMATION ABOUT COMPUTERS AND DIGITAL PRODUCTS

Has the arrival of the internet reduced the value, to consumer PC users, of the specialised computer magazines? After all, PC users are the most internet-savvy group, by definition, so do computer magazines still have a role? Yes, they do – as shown by a survey commissioned by VNU Global Media and conducted by A C Nielsen. The 2004 study "Media Preferences of Digital Consumers" [96] interviewed almost 7,000 consumers in seven European countries including the UK. All respondents had a PC and access to the internet

at home, and read a computer magazine. It examined how their information sources and media preferences had changed with the advent of the web.

The key question was "What are your most important sources for the information you need regarding PC and digital products?" The internet and computer magazines had very similar high ratings. For both media, more than 90% rated them as important. This was well ahead of all other channels, as the graph shows.

This was reinforced when respondents were asked, for each of the same 12 information channels, "would you say that, compared to five years ago, it has gained in importance, lost in importance, or not changed in importance for you?". Only 13% said computer magazines had lost in importance while 55% said they had gained in importance. For all other channels except the internet, a higher proportion of respondents – usually much higher – said the channel had lost in importance over the past five years. Similarly, looking to the future, when respondents were asked about the likely situation in three years time, 43% thought computer magazines would become more important than now (a figure only beaten by the internet and – marginally – email newsletters about IT) while only 12% thought the magazines would become less important (the lowest percentage for any channel except the internet).



Base: Total 6971 Digital Consumers In Europe

What this demonstrates is that the internet has not displaced magazines, even for information about computers and digital products. The new medium has come

alongside computer magazines and added new attributes, but words and images printed on paper and published in magazine format still have something unique to contribute.

34. CUSTOMER MAGAZINES

Although, like a conventional paid-for magazine, many customer magazines carry advertising from third parties, they are a separate channel of communication because their prime functions are different. Customer magazines are regularly published titles produced by publishing agencies on behalf of brand owners, and are distributed to customers, employees, members and/or stakeholders. Most are distributed in-store or by post. Their underlying objectives are to deepen the brand's relationship with its target audience, engaging in dialogue with customers, and enhancing loyalty. This may involve informing and entertaining the reader; providing advice, ideas and suggestions about products or services, thus driving sales; increasing the frequency of store visits; representing a tone of voice for the brand; influencing brand image; or any other marketing objective. According to the latest bi-annual Mintel report on the customer magazine industry, published in 2005 [97], the industry comprises about 700 titles and was worth about £385 million in 2004, with turnover on a sharply rising trend.

IMPROVING BRAND EQUITY

New research has demonstrated that customer magazines can increase the appeal of and affinity with

the brand, and boost share of expenditure. The "APA Advantage Study" [98] was conducted by Millward Brown, and published in March 2005 for customer magazines' trade body the Association of Publishing Agencies (APA) and Royal Mail. 17 brands with customer magazines were studied, and for each brand two samples were selected: a sample of customers exposed to the magazine, and a control sample of customers who were not exposed to the magazine. The magazine sample was weighted by demographics to match the control sample. Aggregating across the 17 brands, a total sample of 4,390 consumers was interviewed.

Millward Brown's 'Brand Equity Pyramid' technique was used to assess the impact of customer magazines. The pyramid consists of four measures which taper upwards: awareness of the brand; acceptance (would not reject the brand); appeal (it offers something more than competitors); and affinity (good knowledge of the brand and higher than average purchase consideration).

Results showed that customers who had seen the magazine were more positively disposed to the brand than customers who had not seen the magazine – on all four measures.

Brand Equity Pyramid

	Exposed to magazine %	Control: not exposed %	Index: Control=100
Affinity	37	28	132
Appeal	51	40	128
Acceptance	93	89	104
Awareness	99	97	102

Since both samples were customers of the brands surveyed, the levels of awareness and acceptance were very high. Where a substantial difference emerged was in the two highest levels of the pyramid. The appeal of

the brand was 28% higher, and affinity (linked to purchase consideration) was 32% higher, among those customers who had seen the customer magazine.

BOOSTING CONSUMER SPENDING BY 8%

A second measure was a Consumer Loyalty Score, based on questions about purchase consideration. Millward Brown's experience with this loyalty score, used in 3,200 studies across 69 countries (including 377 studies and 150,000 respondents in the UK), is that the score predicts actual buying behaviour very accurately. Specifically, it predicts share of category expenditure which is spent on the brand in question.

The Consumer Loyalty Scores were averaged across all brands, separately for the two samples. With the control sample indexed as 100, the score for customers exposed to the customer magazines was found to be 108. That is, they were predicted to spend 8% more of their category money on the brand in question.

The study also found that the average customer magazine is read for 25 minutes - very similar to QRS (leaving aside the monthly television listings titles). Another finding was that 44% of readers take some form of action as a result of reading the magazine. For

example, with a car manufacturer's magazine the action might be at least one of: visiting or phoning a dealership, entering a competition, using vouchers, visiting a website, enquiring about a specific product or service, or buying something.

The "APA Advantage Study" is to be updated with new cases every six months. Details will be released on APA's website at www.apa.co.uk

INFLUENCING BRAND IMAGE

Another survey by Millward Brown established in a different way that customer magazines have a positive effect on brand image. "Consumer Attitudes To Customer Magazines", commissioned by APA and Royal Mail and published in 2003 [99], interviewed approximately 475 consumer customers, split between those who had read the customer magazine and those who had not, for a range of brands.

The conclusion was that readers have a more positive image of the brand than non-readers.

Agreement with statement, among customers

Statement about company	Readers %	Non readers %	Index
Has a good reputation	93	80	116
Is a company you can trust	89	70	127
Strives to meet customer needs	86	70	123
Looks after its customers	86	72	119
Offers good value for money	84	73	115
Constantly improving products/services	79	68	116

On all six attitudes, reading of customer magazines was associated with an improvement of 15%-27%.

A summary of **two other research studies** on

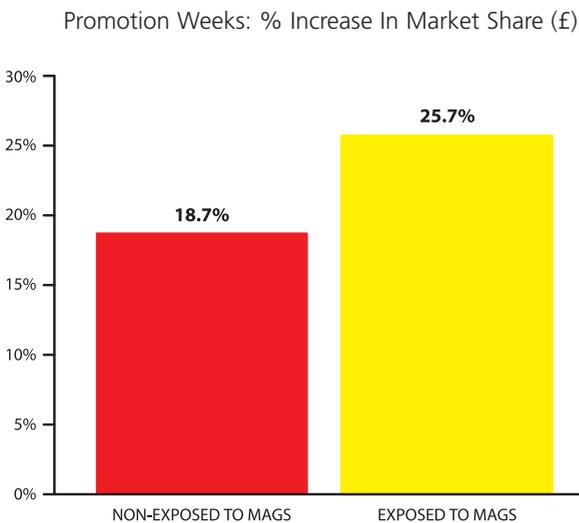
customer magazines, published in 1999 [100] and 2002 [31, 101], can be found on the 'How Magazine Advertising Works' website, www.hmaw.net

35. MAGAZINES AND PROMOTIONS

PROMOTIONS WORK HARDER WHEN ACCOMPANIED BY MAGAZINE ADVERTISING

In-store promotions can give an immediate boost to sales, sometimes quite dramatically - though the boost dies away almost as soon as the promotion has ended. Nevertheless "Sales Uncovered" (described earlier in section 23) has shown that promotions are more effective in the very short term when accompanied by magazine advertising.

In the "Sales Uncovered" analysis, for each advertiser who used promotions at all, the weeks during the magazine campaign period in which promotions occurred were examined.



In those weeks when there was promotional activity: among those not exposed to magazines the market share rose by 18.7% compared with the pre-campaign period. But among those exposed to magazines, market share rose by 25.7%. Thus magazine advertising was associated with an additional 7.0 % increase in share. Magazines make promotions work harder. (This conclusion was also reached by MMA, quoted at the end of the following sub-section.)

HOW PROFITABLE ARE PROMOTIONS?

Promotions can certainly boost sales in the very short term, as demonstrated above. Yet in the long run they weaken the product's branding. In addition they can often be shown to be unprofitable even in the short term. Two studies in the early 1990s, by Jones [102] and Ehrenberg [103], were particularly relevant because each covered many brands and because they examined

the effect of promotional activity on both profits and long term buying behaviour. Both studies found that promotions were bad if not disastrous for profits, and had no beneficial effect on long term sales or brand loyalty. Jones wrote in 1995 "the sales stimulus provided by promotions always succeeds in sucking profit out of a brand, despite its positive effect on short term volume" [104]. Abraham & Lodish used the IRI BehaviourScan panel to examine the marginal profitability of promotions, comparing promotions against a projected baseline derived from unpromoted periods. They concluded [105] "Only 16% of trade promotion events were profitable based on their incremental sales of brands... For many of the promotions, the cost of selling an incremental dollar of sales was greater than one dollar!" - partly because consumers bring forward their purchases by stocking up during the promotion and thus do not need to buy at normal prices in the following period. Abraham & Lodish also found that promotions do not carry any benefits into subsequent periods as advertising does.

A large-scale Nielsen study called "Strategies of Successful Brands" [106] also concluded that sales promotion activity does not achieve brand building at all in the long term.

A 1996 analysis of the TNS Superpanel [107] reinforced this picture. It covered three major fmcg markets: instant coffee, machine wash products, and yellow fats. All purchase records for 1993 and 1995 were classified by whether the purchase was made at a normal price or a discounted price (including multibuy and free extra packs). Typically about 15% of consumers account for 60% of price-discounted purchasing. When change in market share from 1993 to 1995 was examined, it was found that in general price promotion had not been a successful strategy in growing a brand's market share. Indeed the brands that increased their share during the two years were more likely to be brands that did not discount their prices. Moreover very few discounting brands increased their sales to the extent necessary to make up for the loss in profit on each sale. Typically a 20% price reduction will reduce the manufacturer's gross margin by more than half, so discounted sales need to more than double in order to make up lost profit; few brands achieved it. TNS's conclusions were that promotions do not benefit long term sales, and usually they are not even profitable in the short term.

In 2001 Ehrenberg & Hammond reported on a fresh analysis [108]. They concluded that price promotions seldom attract new customers, lead to no extra subsequent sales, do not affect repeat-buying loyalty, seem to induce no deal-proneness, and reach relatively

few people anyway. No wonder they subtitled their article “Why the true value of price promotions is virtually negligible”.

An econometric analysis conducted in 2001 by MMA for Magazine Publishers of America, “Measuring Magazine Effectiveness” [109, 110] (described in section 40), found that promotions were less sales-effective than above-the-line media, even in the short term. MMA divided their database of 186 brands into sixths according to their level of sales success. The most successful one-sixth of the brands, which had an average effectiveness index of 3.0, spent an average of 49% of their marketing budgets in media (TV, magazines and radio) and 51% on promotions and other non-media activities. In contrast, the least successful one-sixth of brands, which had an average effectiveness index of only 0.3, spent only 25% in media, with 75% in promotions and other non-media activities. Media advertising evidently has a better pay-off than promotional and other expenditure.

MMA also pointed out [111] that media advertising (unlike promotions) may also produce long term benefits as well. In addition it can reduce price sensitivity among customers (making profit generation in the long

term easier), and reduce the effectiveness of competitors’ promotions.

All this reinforces the case for switching money out of promotions and into conventional media. And since a mixed-media campaign of say television and magazines improves the efficiency of media advertising it doubly justifies larger budgets spent on above-the-line media - if necessary at the expense of below-the-line promotions.

A further analysis by MMA showed that if promotions are indeed used, the higher the proportion of expenditure allocated to magazines the higher the effectiveness of the **promotions**. For brands spending 0%-4% of their marketing budgets in magazines, promotions had an effectiveness index of 1.0. For brands spending 4%-10% in magazines, promotions’ effectiveness was higher at 1.4. The big jump occurred for brands spending 10%-61% in magazines; for them, the effectiveness of promotions was 2.4. Magazines not only make television work harder – they also make promotions work harder. This reinforces the evidence from “Sales Uncovered” quoted in the previous subsection.

(E) MIXED-MEDIA ADVERTISING: THE EFFECTIVENESS OF COMBINING MAGAZINES AND TELEVISION

36. MAGAZINES AND TV

Of particular interest to magazine publishers are two competing media strategies: using TV only, versus combining TV with magazines.

Magazines are an effective and versatile advertising medium not only when employed on their own but also when used in conjunction with television. They are a natural complement to TV. Television is of course a very powerful medium, and obviously it works in a very different way from magazines. Its strengths cannot be matched by magazines, but television has limitations too, and these are precisely where magazines have their strengths.

Thus television is intrusive, has movement and sound and can create emotion, and while the commercial is being broadcast there is no competing editorial content; but a commercial runs a fixed length of time and is beyond the control of the viewer. Magazine advertisements are permanent and portable; the reader can hold and study an ad for as long as desired. The reader is in control of his or her own exposure. Consequently the combination of television and

magazines is even more effective than television on its own.

Many aspects of this topic are examined below, and the clear conclusion emerges that the effectiveness of television advertising will be enhanced if it is combined with magazine advertising.

From the point of view of managing the budgets, there are two ways of bringing this mixed-media policy into being. One is to re-allocate a minority of the TV budget (perhaps about 25% or 35%) to magazines. The other is to leave the television budget untouched and make magazines a straight addition, drawing the money from elsewhere and in particular from promotions. Promotions can boost sales in the very short term but in the long run they weaken the product's branding. In addition they can often be shown to be unprofitable even in the short term (as just discussed). A mixed-media campaign improves the efficiency of media advertising and justifies larger budgets spent on above-the-line media - if necessary at the expense of below-the-line.



37. TV+MAGAZINES: IMPROVED DISTRIBUTION OF ADVERTISING EXPOSURES

No television advertising campaign provides evenly balanced coverage across all sectors of the population. Many people are simply light viewers of commercial television and cannot be reached to the same extent or frequency as the heavy viewers who watch a lot of commercial TV. The light viewers do however read magazines.

Magazines are a mass medium with a high penetration of the population. 77% of adults read at least one of the 174 magazines measured by the National Readership Survey (January-December 2004, average issue readership). When one considers that there are also more than 3,000 other consumer magazines, it is safe to say that more than 80% of adults read a magazine.

An appropriate selection of magazines in an advertising schedule can thus fill the coverage and frequency gaps left by television. In other words, improved targeting.

This can be demonstrated by analysing and comparing the coverage and exposure frequency of the two media strategies. The following example is based on analyses conducted by KMR-SPC using their Mercury software and the BARB/TGI fused database [112].

A four-week television campaign was planned against a target audience defined as all women. An alternative mixed-media schedule has been drawn up for comparison, in which 25% of the budget was re-allocated to women's weekly and monthly magazines, while 75% remained in television, thus keeping the total expenditure the same. The analyses were broken down by weight-of-viewing groups.

At no extra cost, the mixed media strategy gave the total audience almost a fifth extra exposures, from 400 gross ratings to 493 (see table). At the same time it substantially increased the net coverage (those exposed to at least one advertisement) from 73% to 87%. The 4+ coverage rose from 40% to 54%. The 4+ coverage is an important measure for a four-week campaign since it shows the proportion of the target audience who see an advertisement at least once a week on average.

Even more important was the effect among women who see least commercial television. Among Light-Non ITV viewers, gross ratings almost doubled, while net coverage increased by half, from 51% to 76%. 4+ coverage rose dramatically from 15% to 34%. If a higher proportion of the budget had been allocated to magazines (say 30%-35%) this would have improved even further.

The mixed-media schedule also delivered significant gains in gross ratings, net coverage and 4+ coverage among Medium and Medium-Heavy viewers. Even the Heavy viewers did not receive weaker exposure from the mixed-media policy. Gross ratings were virtually identical, the net coverage rose slightly from 93% under the TV-only strategy to 96% under the mixed-media scheme, and 4+ coverage rose a little from 80% to 84%.

In short, the large disparity in exposure between Heavy viewers and Light-Non viewers which a television-only campaign creates is greatly reduced by allocating only a quarter of the budget to magazines.

Comparing TV-Only And TV+Magazine Strategies

	All Women	Weight Of Viewing			
		Light & Non	Medium	Med-Heavy	Heavy
TV ONLY, 100% OF BUDGET					
Gross ratings	400	163	288	473	874
Net coverage (1+)	73.2	50.9	76.0	88.3	92.7
4+ coverage	39.6	14.8	28.5	57.1	79.6
Average frequency	5.5	3.2	3.8	5.4	9.4
TV 75% +MAGAZINES 25%					
Gross ratings	493	309	404	559	862
Net coverage (1+)	86.7	75.8	87.9	93.7	96.0
4+ coverage	53.6	33.6	45.9	65.8	84.0
Average frequency	5.7	4.1	4.6	6.0	9.0

What The Final 25% Adds

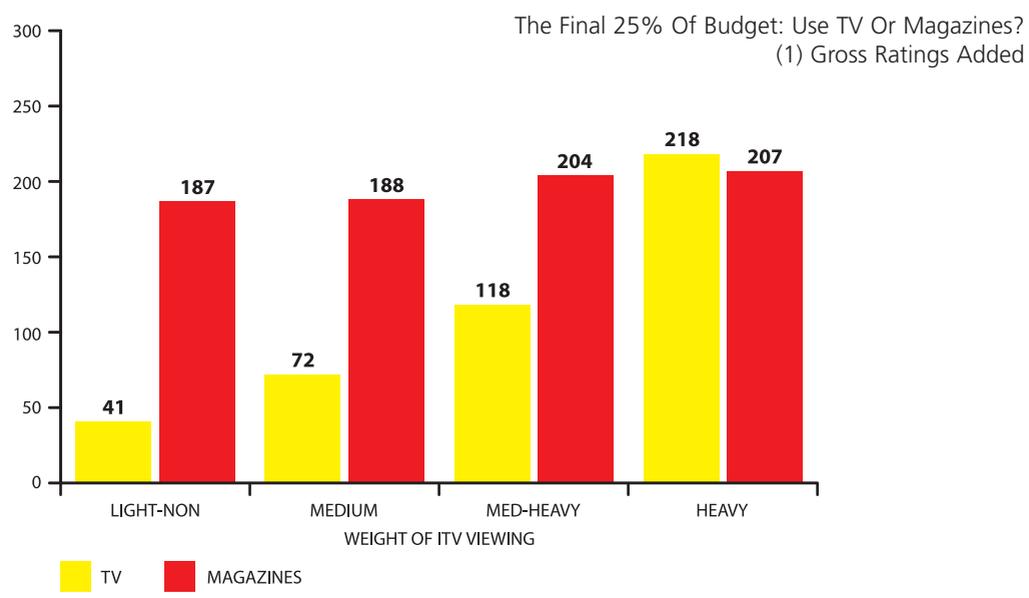
	All Women	Weight Of Viewing			
		Light & Non	Medium	Med-Heavy	Heavy
(A) IF SPENT ON TV					
Gross ratings	100	41	72	118	218
Net coverage (1+)	4.0	5.3	5.2	3.1	1.3
4+ coverage	8.3	4.5	8.9	15.7	8.0
Average frequency	1.1	0.5	0.8	1.2	2.3
(B) IF SPENT ON MAGAZINES					
Gross ratings	193	187	188	204	207
Net coverage (1+)	17.6	30.2	17.0	8.5	4.7
4+ coverage	22.2	23.2	26.4	24.4	12.5
Average frequency	1.4	1.4	1.6	1.8	1.8

Source: KMR-SPC (BARB/TGI fused database, Mercury software)

Another way of looking at this is to ask what the final 25% of the budget adds, once the first 75% has been allocated to television.

If the final 25% is spent on television, among the total audience of all women it adds 100 rating points, a further

4% net coverage, and 8% 4+ coverage, to what is delivered by the original 75% spent on television. If instead the final 25% of expenditure is allocated to magazines, it adds 193 gross rating points, a further 18% net coverage and 22% 4+ coverage. In all respects, it is materially better than television's marginal contribution.

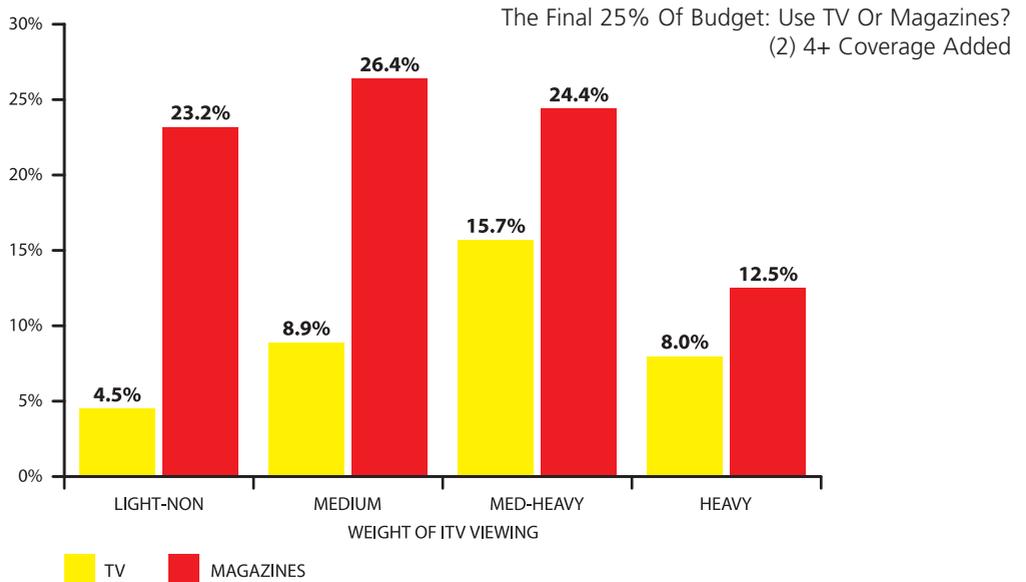


The chief benefit however is among the people who see least of the television campaign. Among Light-Non viewers, if the final 25% of money is spent on television, it adds only 41 rating points, 5% of net coverage and

5% of 4+ coverage. By contrast, spending the marginal 25% in magazines adds 187 rating points, a further 30% of net coverage and 23% of 4+ coverage.

Although the effect diminishes a little among Medium viewers and rather more among Medium-Heavy viewers, the gains there are still substantial. Nor are these major advances at the expense of the Heavy viewers. Spending the final 25% in magazines delivers almost the same gross ratings as spending the money in

television, and it adds more net coverage (5% extra, compared with 1% extra) and more 4+ coverage (13% extra instead of 8% extra) for Heavy viewers. So even among Heavy viewers a slightly superior result is achieved by putting the last quarter of the budget into magazines.



It is not effective to buy even more ratings in a medium in order to reach the people who hardly use the medium. It is better to turn to another medium which they do use.

BENEFITS OF TV + PRINT, IN TERMS OF EXPOSURE AND TARGETING

Many similar examples of comparing TV-only and TV+print schedules have reached the same conclusion: that by re-allocating around 25%-35% of a television-only budget to print, an advertiser can achieve a number of vital benefits:

1. A very considerable improvement in the way advertising exposures are distributed across the target audience.
2. A solution to the problem of adequately reaching light viewers.
3. Similarly a solution to the difficulty of reaching ABC 1s, the more affluent, and the better educated (groups who are predominant among light viewers and are often a key part of an advertiser's target audience).
4. Increased net coverage.
5. Increased numbers who receive higher levels of opportunities to see - such as those receiving at least 4 opportunities to see (4+ coverage).

6. A lower cost per thousand.
7. And as a later section of this report shows, the opportunity of communicating the advertising messages through two different but complementary media forms, with the enhanced richness and effectiveness of communication that this makes possible.

Of course, television and print exposures are not directly comparable. In combining the opportunities to see delivered by each medium it is not implied that a TV exposure is the same thing as a magazine exposure. Rather, there is a choice between reaching a particular member of the target audience in different ways: say 6 times through a television-only campaign, or say 8 times through a TV-plus-print campaign which delivers 5 exposures through television and 3 through the print advertisements.

These analyses have been based on the idea of taking money from the TV campaign to pay for magazine advertising. The alternative strategy is to take the money from promotions or other budgets, leaving television expenditure unaltered. This can be justified because a mixed-media strategy improves the efficiency of media advertising, compared with TV on its own, and promotions produce little or no extra profit (see section 35).

38. TV+MAGAZINES COMMUNICATE BETTER THAN TV-ONLY

Because television and magazines work in such different but complementary ways, the communication delivered by a TV-only campaign can be substantially enhanced by adding magazines.

The two classic pieces of research which demonstrated the improved communications delivered by TV-plus-print were 'Multiplying the Media Effect' [113] and 'The Media Multiplier' [114]. Between them, they provide 19 detailed case histories showing how print advertisements can add to and enrich what is perceived in television commercials, especially if the creative treatments in the two media are designed to be complementary.

'MULTIPLYING THE MEDIA EFFECT'

This survey, carried out in 1985 and published during 1986 and 1987, studied seven mixed-media campaigns [113]. It was commissioned by a group of consumer magazine publishers working together under the name of The Magazine Marketplace Group, under the auspices of PPA, and the fieldwork was conducted by Communication Research Ltd.

The approach was to show informants magazine advertisements and television commercials from the same campaigns and examine what was communicated. This was done through hall tests, in which each person saw two or three campaigns. All informants were users of the product types in question, as well as falling within demographic quotas. The order of showing TV and magazine advertisements was carefully rotated, with advertisements being shown a second time under a controlled sequence. After each ad was seen, a standard set of open-ended questions was asked, the key question being "Please tell me everything that passed through your mind while you were looking at the advertisement, whether or not it was actually connected with it".

Illustrations from three of the campaigns give a flavour of the results.

Birds Eye Country Club

One of the campaigns was for the 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. In particular there was more emphasis on the vegetables themselves, especially how attractive they looked, and the variety (though the TV commercial showed just as great a variety). A word-count of the number of mentions of each vegetable shows this clearly. 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 certain things better than the commercial, but also enhanced the response to the commercial.

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.

Danish Bacon

Another campaign was for Danish Bacon, in which both the magazine ad and the commercial portrayed bacon sizzling in a frying pan. As a control, part of the sample had seen the bacon commercial, then a magazine ad for a **different** product, then the bacon commercial again. The test sample had seen the bacon commercial, then the magazine ad for **bacon**, then the Bacon commercial again. A word-count was made of the number of mentions of words like 'appetising', 'hungry' etc after each showing. Expressing the word-count in index form, among those who saw a magazine ad for a **different** product between the two showings of the bacon commercial, there was an index of 100 mentions of 'appetising', 'hungry' etc after the first TV showing and an index of 31 after the second TV showing. Among the matched sample of those who saw the magazine ad for **bacon** between the two showings of the bacon commercial, there was an index of 115 mentions of 'appetising', 'hungry' etc after the first commercial, an index of 162 after seeing the magazine ad, and 92 after the second TV showing.

The point here is not only that the magazine exposure produced more 'appetising'-type thoughts than any of the television showings, but that after seeing the bacon magazine advertisement the informants experienced far more 'appetising'-type thoughts **while watching the TV commercial** than did the informants in the control sample.

It appears that the stimulus provided by the magazine advertisement had created new perspectives, which remained in informants' minds while they watched the subsequent television commercial, and these affected their responses to that commercial.

Conclusions

The overall conclusions of 'Multiplying the Media Effect' were that:

- not only can one medium communicate ideas additional to those derived from seeing another
- one medium can also 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

The page and the screen nourish each other.

'THE MEDIA MULTIPLIER'

'Multiplying the Media Effect' aroused such interest around the world that the UK's Press Research Council, representing magazines and newspapers, extended the investigation by commissioning twelve more case studies. They were published in 1990 in a report titled 'The Media Multiplier' [114].

Two research companies conducted the survey in 1988 and 1989: Communication Research Ltd and The Research Business. There was a robust sample of 1,400. Consumers were asked to describe their response to the TV commercial both before and after being shown a print advertisement for the same product. Their separate responses to each medium were recorded, and control groups were shown only the TV commercial or only the print ad. This meant it was possible to identify the effects of TV alone, of print alone, and of both media together.

The results demonstrated that advertising in magazines or newspapers in addition to television, rather than using television on its own, bring a number of very important communication benefits. In summary:

- Print 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.

Print not only makes its own unique contribution, it also makes the television commercials work harder. The

effect of adding print to television is not merely additive, it is multiplicative. Using the two media produces an invaluable interaction.

Such effects can be heightened by deliberately building creative links between the TV and print advertisements.

With as many as twelve campaigns to analyse, the survey was able to document some of the ways in which print can help television to work better. Every item on the following list emerged from at least two case histories.

Print can:

1. Lead people to see the TV commercial in new ways, and look for details
2. Encourage more response to the commercial
3. Add extra information or messages
4. Re-inforce the TV message
5. Expand the TV message
6. Help understanding of the TV message
7. Strengthen brand identification
8. Make the product more accessible
9. Focus more on product-oriented messages
10. Create a more positive feeling towards the product

There are two other important considerations:

11. The beneficial effects can be heightened by building creative links
12. The benefit is a two-way affair

While no mixed-media campaign will work in all of these ways simultaneously, all TV-plus-print campaigns will benefit from some of the factors on this list.

The key findings from four of the campaigns are summarised here, to illustrate the print-television relationship:

Cheeses of England and Wales

The television and magazine advertisements were very different in style but complemented one another well. Responses to the print ad were particularly product-oriented, and there was much evidence of interaction between the two media. The print treatment tended to direct attention to details within the TV commercial, focusing on the product rather than the execution. It led respondents to look harder at the recipe information featured very briefly in the commercial and encouraged thoughts concerning the variety and versatility of the cheeses. The magazine ad also helped informants to appreciate the health and fitness story within the commercial - including comments about cheese being

full of protein, vitamins and calcium, copy points made explicit in the magazine ad. In addition print strengthened the branding of the product - cheeses from England and Wales rather than just "cheese". Exposure to the magazine advertisement modified informants' reactions to the TV commercial when seen subsequently, and in directions which could be attributed to the magazine ad.

Access credit card

The television commercial conveyed the idea of flexibility very successfully. The print advertisement added considerably to this. It led informants to become more involved in the detail of the television commercial. They also took the messages they had absorbed from the print advertisement and applied these to the TV, thinking through the implications of flexibility instead of simply replaying flexibility as the sole message. Print had made respondents dwell on the varied practical attributes of an Access card as well as the general quality of flexibility. Print had added flesh to the TV bones.

Sarsons Pickling Vinegar

Both TV and print communicated the idea of quick and easy pickling, and the correct brand name. The magazine advertisement, however, more clearly communicated the existence of two types of vinegar, and the different purposes for which they can be used. Exposure to the magazine ad had an effect on some informants when they saw the commercial for a second time, for they appeared to look out for details and were more aware of the two varieties of vinegar that were shown in the commercial, and the versatility of use which this implied.

Volkswagen Passat

Exposure to the print advertisement was able to increase significantly the number of new thoughts generated while seeing the TV commercial for the second time. Readers were able to pick up detailed copy points mentioned in the magazine ad, such as the large interior space and the plush upholstery, and were helped to perceive such points in the commercial when it was shown again. Print was successful in reinforcing the messages conveyed by the commercial, sometimes leading certain informants to understand these messages when they had not been fully absorbed from television alone. The close creative links between the treatments in the two media facilitated the transfer of ideas from one medium to the other.

A GERMAN MEDIA MULTIPLIER STUDY: FORD COUGAR

A German media multiplier study published in 2000 is particularly interesting because of its reinforcement of

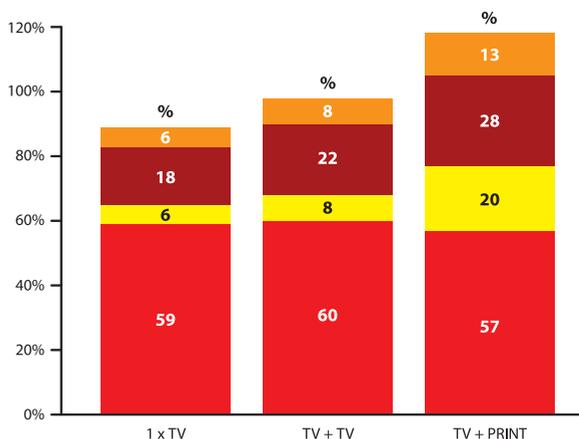
the idea (hinted at in the early UK studies) that magazines are particularly adept at communicating the more subtle messages that television may not so easily get across. "The Multiplier Effect: TV + Print Improves Communication" [115] researched 12 campaigns in carefully controlled exposure conditions. 11 of the 12 campaigns showed media multiplier effects. As an example, one of the campaigns was for the sporty Ford Cougar car.

The TV commercial showed the drivers of the Cougar and a motorcycle meeting at a petrol station. They smile and leave, with the motorcyclist following the car. In an empty wide mountain landscape they draw level, laugh at each other, the motorcycle passes, then the Cougar accelerates and passes the motorcycle. The voice-over says "The new Ford Cougar. The return to freedom." The magazine advertisement was closely linked creatively, reflecting the scene.

There were four key messages to be communicated, and spontaneous comprehension of them was tested. Adding together the awareness percentages of all four messages, there was a total score of 89% among people who saw the TV commercial only once. People who saw the TV commercial twice had a total score of 98%, an increase of 9 percentage points. But those who saw the TV commercial once, followed by the print ad once, had a total score of 118% - an increase of 29 percentage points. That is, when the second ad was in print it had three times the effect of when the second ad was another TV commercial.

Of added interest is the effect on the four individual messages which the advertising was intended to communicate – summarised in the chart.

Spontaneous Comprehension Of Messages



The first column is the comprehension among people seeing the TV commercial once. The second is those seeing two TV commercials. The third is those seeing a TV commercial followed by a print ad.

Reading across the columns shows the effect on individual messages. The message at the top of the columns was 'If, as a younger, reckless type you used to like motorcycling, then this Cougar provides you with an alternative'. Only 6% of those seeing the TV commercial one time understood this message spontaneously; this rose to 8% among those seeing the commercial twice. But comprehension was highest at 13% among those for whom the second ad was in print. The second message was 'A young model for older men, an Easy Rider feeling, a recall of my youth'. Again, comprehension was greatest, at 28%, among those seeing TV + print. The third message was 'A car that feels like a motorcycle, the same lifestyle and fun in the Cougar as on the Harley'. By an even greater margin than before, a second exposure increased comprehension if it was in print: 20%, compared with 8% if it was on TV.

The fourth message was 'Free, freedom, gives a feeling of freedom and adventure, freedom and light-heartedness'. This was such an obvious message from the advertising – including the TV voice-over saying "The return to freedom " - that around 60% of respondents understood it straight away, and seeing another ad didn't increase comprehension whether it was on TV or in print. This is an instructive point. Most people have learned how to decode advertising messages to some extent, so they get the obvious message easily enough, but for the more subtle, detailed messages print is more powerful than additional TV.

Based on the evidence of all twelve researched campaigns, the study concluded that:

- Mixed-media contacts improve the learning effect, lead to a more intensive perception of the

advertising message, and consequently recall of the advertising content becomes richer.

- Consumers remember details of the TV commercial that they would not have noticed without seeing the print ad.
- Print promotes more product-related reactions to the TV spot, and offers supplementary information which television with its transitory images cannot accomplish. The complete claim can be communicated.
- Mixed-media contacts create a transfer of credibility. Information-centred, factual print ads may balance more emotional TV advertising and thus support the product claims and/or minimise any doubt about the commercial's claims.
- In addition faulty understanding of the TV messages can be corrected by receiving the messages through the additional medium of print.
- Action is promoted. The intensified processing of potential arguments, which is an effect of mixed-media exposure, causes consumers to internalise reasons why they should do something and to whom they can turn.
- Creative links strengthen the mix effect, but this doesn't mean the print ad should be a still from the commercial. Best results are achieved when a varied design is used to express the same basic messages, to reinforce the memorising and processing of the advertising content.

THE SYNERGY IS WORLD-WIDE

Since the publication in 1986 of the pioneering 'Multiplying the Media Effect' many other surveys along similar lines have been conducted in countries around the world [116]. All have found the same results: the combination of print and television has a multiplying effect on communication effectiveness, compared with television on its own. Without doubt this is not a phenomenon peculiar to the UK but is a result of the contrasting but complementary characteristics of the two media.

39. MAGAZINES EQUAL TV FOR CREATING AWARENESS – BUT DO SO AT LESS COST

IPC'S AD TRACK

As already discussed, IPC's Ad Track 94 survey [44] showed that on average magazine advertising generates the same level of awareness as television advertising - at the rate of 13% awareness per 100 gross rating points. However for magazines the figure of 13% was an average across all exposures in the campaign. A higher awareness level was generated by the first exposure to magazines - whereas Millward Brown found that for the television campaigns the first exposure produced the same awareness level as the TV campaign average.

In fact the awareness score of magazine ads at their **first** exposure was 18% awareness per 100 rating points, averaged across all campaigns. This can be compared with an average awareness score for TV commercials at their first exposure of 13% awareness per 100 rating points. As Millward Brown wrote, "this suggests that when they first appear, the print executions are often better at registering something in connection with the brand than TV".

This is a most impressive result for magazine advertising - creating more awareness on first exposure than television usually accomplishes. The explanation is no doubt to do with the repeat reading of magazine pages (which QRS's PEX has demonstrated) and readers' ability to pause and study anything that catches their interest.

The reason that the **average** awareness index for magazine ads across complete campaigns fell to 13% is, in Millward Brown's view, that a given creative execution in print eventually loses some of its impact because readers have either absorbed the message from the ad or else mentally edit it out of their subsequent reading. Millward Brown call this 'wear-out' but a more appropriate term is 'over-exposure' because "this label correctly places responsibility for dealing with the factor upon the user of the medium" [117], the advertiser/agency. This potential for over-exposure of a given execution arises from one of the great benefits of print advertising - that readers are in full control of what they look at and can study an advertisement for as long as they choose, and as often as they choose.

The solution to over-exposure of a given creative treatment is to use more executions: instead of running just one advertisement, create two or three. The new ads will stimulate fresh involvement and push the average awareness index above the 13% mark - that is, above TV's average level.

There is much more to be discovered about the ability of magazines to refresh a campaign by introducing new creative executions. This is one of the priority areas for further research. Meanwhile Millward Brown are surely correct in saying "a major magazine campaign needs to be conceived in the form of several complementary executions" [118].

MPA'S 113-BRAND TRACKING STUDY

"Dollar for dollar, magazines deliver significantly higher advertising awareness levels than television."

This was the clear conclusion of a major analysis published in 1998 by Magazine Publishers of America [119], in which Millward Brown examined 113 campaigns in the USA which used both television and magazine advertising. Awareness of the campaigns had been measured by Millward Brown as part of their normal continuous telephone tracking studies, during the two-year period January 1996-December 1997. For every campaign, Millward Brown compared the awareness generated by each medium with the expenditure in the medium, and to the number of gross rating points bought in the medium.

Combining all 113 campaigns, 36% of total advertising awareness was created by television, 29% by magazines, and 35% jointly by television and magazines together. Television therefore had a 71% share of awareness (36%+35%) and magazines had a 64% share (29%+35%).

77% of the advertising expenditure had been on television and only 23% in magazines. Relating this to awareness, television had an index of 92 (71% share of awareness divided by 77% share of expenditure) whereas magazines had an index of 278 (64% share of awareness divided by 23% share of cost). Magazines' index of 278 is 3.0 times greater than television's 92. In other words for every dollar spent, magazines delivered three times as much ad awareness as television.

It was a similar conclusion when looking at gross ratings rather than expenditure. Television generated 76% of the gross ratings while magazines generated 24%. Thus the index for television was 93 (71% share of awareness divided by 76% share of ratings) and for magazines it was 267. So for every 100 rating points bought, magazines delivered almost three times as much ad awareness as television.



These general conclusions were found to be true:

- across product categories
- for different budget levels
- whether there were few or many competitors
- for new and established brands

Another finding was that for most brands (61% of them) a change in advertising awareness was associated

with a corresponding change in purchase intent ("Definitely or probably will buy") - confirming that awareness is an important measure. Moreover, for brands where this association occurred, most of the ad awareness was attributed jointly to television and magazines working together. This reinforces the view that the two media in combination are more effective than either on its own.

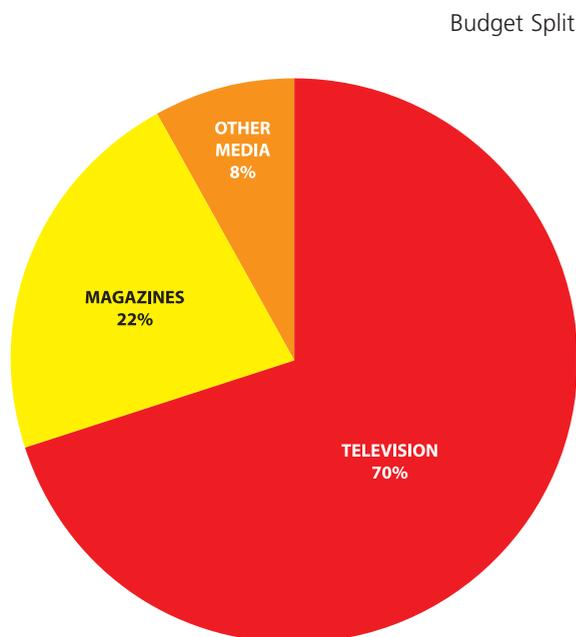
40. MARKET TESTS: SALES EFFECTIVENESS OF TV + MAGAZINES

A growing number of market tests and econometric analyses are proving that mixed-media campaigns involving magazines can sell products - and sell them more effectively than a campaign using television on its own. Some of the following examples are from the UK, while others are drawn from elsewhere and show that the results arise from the nature of the two media and not from any peculiarity of the UK market.

“SALES UNCOVERED”

In recent years PPA has commissioned two major effectiveness studies utilising the TNS Superpanel, “Sales Uncovered” and “Proof of Performance”. Each included, among the brands examined, campaigns which combined television and magazine advertising.

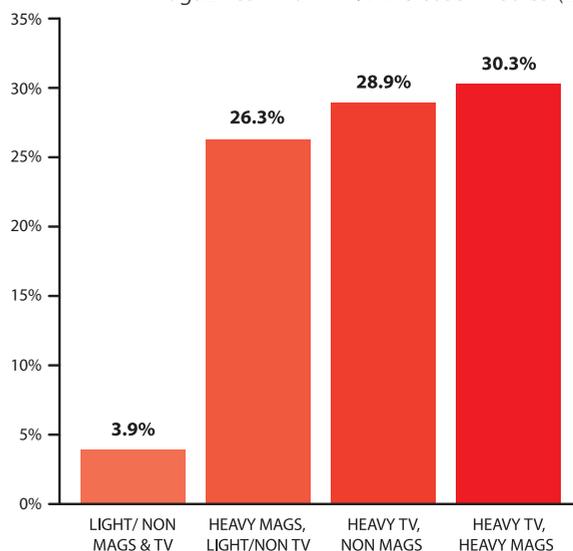
The “Sales Uncovered” study of 2005 [71], described in an earlier section, analysed 20 fmccg brands. Of these, seven were TV+magazines campaigns whose impact was assessed by medium. The average budget split across these brands is shown in the pie chart. 70% of the budget was spent in television and 22% in magazines.



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:

- For the magazine campaigns, the top 40% were defined as the heavy or ‘exposed’ group (as a shorthand); in general, they accounted for about 90% of total magazine exposures. The bottom 40% in the ranking were defined as the ‘non-exposed’ group and acted as a control group; they accounted for around 2% of total magazine exposures.
- For television, a medium with a more diffused audience, the 40% most heavily exposed to the television advertising were defined as ‘heavy viewers’; they accounted for about 72% of all television exposures. The bottom 40% were defined as ‘light/non viewers’; they accounted for about 13% of all television exposures.

Magazines And TV: % Increase In Sales (£)



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%.

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%. Clearly, advertising is effective in increasing sales.

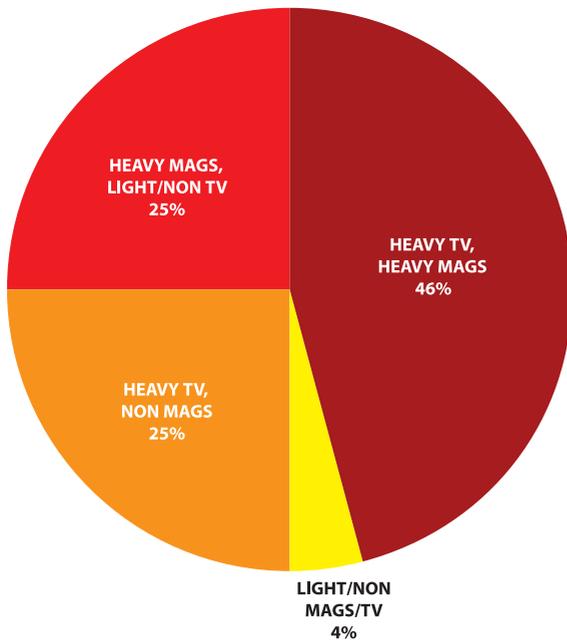
Examination of the sales value figures showed that these two groups had similar purchasing levels during the pre-campaign period, and identical *absolute* increases in sales during the campaign period (hence the very similar *percentage* increases in sales).



It is notable, then, that magazines accounted for a much lower proportion of advertising expenditure than television: 22% of the budget, compared with 70% for television.

The relative cost-efficiency of the two media may be examined across all four groups in the bar chart above. To do this, the absolute increases in sales value (£) are profiled across the four groups as represented in the second pie chart.

Increase In Sales (£): Profile



Television advertising was closely linked to 71% of the sales increase: that is, the 46% among the TV+magazines exposure group, plus the 25% from the TV-only group. There will also have been some smaller effect among the group heavily exposed to magazine advertising and only lightly or not at all to TV.

Magazine advertising was also closely linked to 71% of the sales increase: the 46% plus the 25% from the heavy magazines & light/non TV exposure group.

This can be compared with the profile of advertising expenditure (first pie chart). While magazine advertising appears to have 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 are much more cost-effective at the relative levels of expenditure in these seven campaigns. The reason is surely 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 gone past the point of severe diminishing returns. If, however, a more equally balanced amount had been allocated to magazines and television I would expect the two media to become much closer in cost-efficiency. I draw the conclusion that 22% is too low a share of budget for magazines.

The fourth column in the earlier bar chart titled 'Magazines and TV: % increase in sales (£)' shows the sales increase among Superpanel main shoppers who were exposed to both television and magazines. The figure of 30.3% is higher than for either the TV-only or the magazine-only bars on the chart – as one would expect, because of the advantages of mixed-media scheduling discussed previously. Indeed, one might have expected the difference to be greater. However, granted the conclusion that the television advertising has passed the point of severe diminishing marginal returns, and that the magazine advertising is far from having reached that point, it seems likely that a more evenly balanced expenditure profile would have boosted the sales increase among this TV+magazines group of main shoppers, raising the height of that fourth column.

This topic is discussed further in section 41.

"PROOF OF PERFORMANCE": TV+MAGAZINES

Superpanel [74, 75] examined the link between mixed-media advertising and short term gains in brand share.

PPA's "Proof of Performance" analysis of the TNS

**10 magazine+TV brands
Brand shares (indexed)**

MAGAZINE CATEGORY	ALL MONTHS	MONTHS* WITH MAGAZINE AD SPEND OF:			
		NONE	£1-50K	£50-125K	£125+K
Heavy readers	100	98	99	101	109
Light readers	100	102	94	95	106
Non-readers	100	100	96	97	104
Total panel	100	100	97	98	107

**Magazines time-lagged by one month, to allow approximately for build-up of magazine reading. This analysis was run before NRS readership accumulation data were available.*

For each of the ten brands covered, the ad expenditure in television outweighed the magazine expenditure, and on average the TV spend was about twice the magazine spend. The results are summarised in the table above.

'All months' column is replaced by a 'TV ad months' column, and the indices in this column are slightly above 100, balanced by indices (not shown) of slightly below 100 for the months when no TV advertising occurred.

The influence of the television advertising was felt by all the magazine exposure groups, for the brand share indices for all groups were higher in the months when magazine advertising was heaviest, which tended to be months when television advertising was also running. Nevertheless the effect of the magazine advertising can be seen in the gain of 11% among heavy readers (109/98) compared with 4% among non-readers (104/100).

The much greater weight of television advertising during these months had the effect of reducing the variation between most of the cells in the table, but the main exception was the index for the heavy reader group in the months when magazine advertising was at its strongest. Here the brand share index rose to 114, a gain of 11% compared with the months with no magazine advertising (114/103).

This interaction effect can also be seen when the analysis is confined to those months in which television advertising was taking place. In the following table the

PPA's analysis neatly supports the Media Multiplier proposition that television plus magazines makes an advertising budget work harder than does television on its own.

**10 magazine+TV brands
Brand shares (indexed)
Months when TV advertising was taking place**

MAGAZINE CATEGORY	TV AD MONTHS	MONTHS* WITH MAGAZINE AD SPEND OF:			
		NONE	£1-50K	£50-125K	£125+K
Heavy readers	104	103	103	100	114
Light readers	104	106	101	98	107
Non-readers	102	104	100	96	100
Total panel	103	104	102	98	108

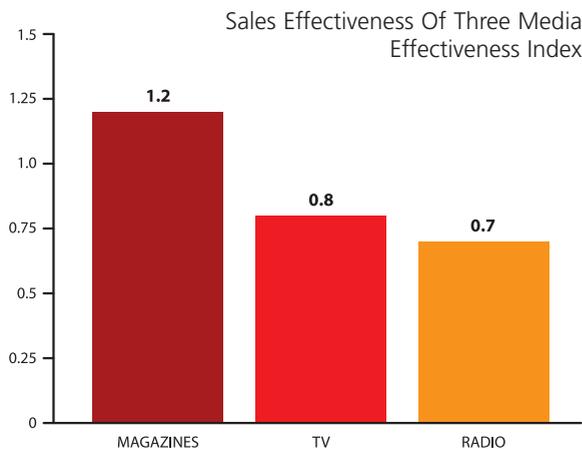
**Magazines time-lagged by one month, to allow approximately for build-up of magazine reading. This analysis was run before NRS readership accumulation data were available.*

USA: "MEASURING MAGAZINE EFFECTIVENESS"
(MMA/MPA)

Magazine Publishers of America (MPA) commissioned from Media Marketing Assessment (MMA) an econometric analysis of MMA's extensive seven-year database of marketing and sales information on 186 brands in 13 product categories, covering the period 1994-2000. The results were published in 2001 in the report "Measuring Magazine Effectiveness: Quantifying the Sales Impact of Magazine Advertising" [109, 110].

Central to MMA's analysis was a measure of 'effectiveness', conceived as the sales effect each dollar has. Brand by brand, a 'base' volume of sales was modelled (sales that would have been achieved that year without additional marketing effort). The remaining sales above 'base' level were generated as a result of that year's marketing efforts. Each medium's percentage contribution to these incremental sales was modelled, and divided by the medium's percentage of marketing expenditure. This produced an effectiveness index. For example, if a medium contributed 30% of incremental sales and accounted for 30% of marketing expenditure, it would have an effectiveness of 1.0. The higher the index the better.

MMA found that magazines were substantially more cost-effective than either television or radio. Magazines' effectiveness index of 1.2 contrasts with only 0.8 for television and 0.7 for radio. Expressed another way, a dollar spent in magazines produced on average 50% more sales than a dollar spent on television.



In another analysis, MMA examined how quickly magazine and television advertising individually generate incremental sales. Studying the weekly

cumulative sales impact of each medium, MMA found that the two media work at very similar speeds. It was not the case, as sometimes suggested, that in general television works more quickly than magazines in creating sales.

UK: CUSSONS CAREX HAND WASH

Before autumn 1996 Cussons Carex liquid soap had confined its advertising to television, with some support on radio and posters. But in autumn 1996 Cussons decided to test the use of magazines as part of a mixed-media campaign [120]. 81% of the budget remained on TV while magazines accounted for 19%, using TV weeklies, women's weeklies and women's monthlies.

Sales were tracked week by week using the TNS Superpanel of households. In the 12 weeks before the magazine campaign began, the Carex market share of sales was similar among households heavily exposed to the selected magazines and those lightly or not exposed. However as soon as the magazine advertising commenced Carex's brand share leapt among the heavily exposed households while being little affected among the light or non exposed households. This was maintained throughout the campaign period.

Additional research established that:

- Sales attributable to magazines were achieved at one-third of the cost of sales attributed to TV.
- Although magazines were only 19% of the budget, they added 50% volume sales above the uplift generated by television.
- The combination of magazines and television was found to produce a better return on investment than TV-only.

UK: NIELSEN'S 'STRATEGIES OF SUCCESSFUL BRANDS'

IPC Magazines co-sponsored one of the largest-ever studies into the long-term effectiveness of marketing activity. It was conducted in 1995-96 by Nielsen [106] and examined 300 products from 50 product fields, using the Nielsen Homescan consumer panel, Nielsen tracking data, and Register-MEAL advertising expenditure figures. For each product the market share, consumer penetration and loyalty were recorded for the six months ending April 1992 and the six months ending April 1995. Changes in these key brand measures were assessed against their advertising policy, pricing, promotions and innovation. Nielsen concluded that innovation is the best single means of developing the strength of a brand, and that sales promotion activity does not achieve brand building at all in the long term.

The lesson for media strategy was that, although many of these brands used only television for their advertising, on average advertisers obtained a higher brand share, and were more successful in maintaining or increasing share over the three-year period, if they used two forms of media such as television combined with magazines. Moreover brands using magazine advertising were on average both bigger and more likely to be growing. Nielsen concluded that “since magazine advertising is less expensive than TV advertising, this implies that magazines can be a highly cost-effective way of communicating with the end buyer”. In addition, the fastest-growing brands tended to be those with a higher proportion of their total adspend in magazines.

UK: KENCO FREEZE DRIED INSTANT COFFEE

Kraft Jacobs Suchard, with a tradition of using television as a branding medium, ran a test of a television and magazines mixed-media campaign for their Kenco Freeze Dried Instant Coffee [121]. IPC Magazines was able to offer regional facilities in its publications on a sufficient scale, and the TV and magazines campaign ran from April to November 1995 in the London/South/Anglia regions which accounted for 35% of the market. In the rest of the country a TV-only campaign was run, on an equal expenditure basis. The budget for the magazine expenditure in the test area was found by switching a share of television money into magazines.

Among the target audience of ABC1 housewives, the net coverage achieved in the TV-only regions was near saturation but nevertheless it was improved slightly in the mixed-media regions. The mixed-media campaign also increased gross opportunities to see by 39%, improved the average frequency of exposure by 35%, and greatly reduced the cost per thousand exposures. Millward Brown tracking research showed gains in advertising awareness in the test area compared with the TV-only regions as soon as the magazine advertising began and it continued throughout the campaign period. Ad recognition levels were highest among magazine readers, and overall the reduction in TV spend in the test areas did not prove at all detrimental to brand image.

Most significantly, sales were improved by the mixed-media strategy. This was measured by two panels, Nielsen and TNS Superpanel.

With sales historically stronger in the south, it was important to allow for this in the analysis. Nielsen's figures showed that prior to the test period Kenco's share of instant coffee sales in the test region was

19.8% ahead of its brand share in the rest of the country. As a result of the test, this differential grew to 25.4%, a very significant gain of 5.6 share points.

The Superpanel was able to compare panel members exposed to the TV-only campaign with those exposed to the TV + magazines campaign. Results showed that the mixed-media campaign improved Kenco volume share by 7%.

Kraft Jacobs Suchard's Director of Coffee Marketing, Nick Shepherd, stated “After careful analysis, we declared ourselves reassured about the potential for mixed-media advertising. Following the regional test results, we are using magazines nationally for Kenco this year – the surest sign that we believe it worked.”

GERMANY: BAUER AND HASSLOCH BEHAVIOURSCAN PANEL

In Germany a single-source panel has yielded further evidence about the virtues of mixed-media advertising. Bauer Publishing have been responsible for a number of tests using the GfK Hassloch BehaviourScan panel [122]. The panel consists of 3,000 households in the town of Hassloch whose purchases in a range of product fields are recorded using scanner technology in local stores. Panel members receive television through a cable system, which means that the commercials shown to each household can be controlled. Panel members also receive two weekly magazines as an incentive, and the advertisements carried in these can be varied too. For the launch of a personal care product two media strategies were tested, representing equal expenditures: some households received 100% television and others received advertising split 68% television and 32% magazines. After the campaign had run for one year the mixed-media strategy had outsold the TV-only strategy by 16%. Most of the increase was due to increased weight of purchasing, rather than the greater penetration of the market - and this in turn was attributed to a more powerful communication of the advertiser's message.

USA: STAS of television and magazines

John Philip Jones, a professor at Syracuse University in New York who spent many years working at J Walter Thompson in London and elsewhere, has analysed and compared two sets of sales and exposure data - one dealing with television advertising and the other with magazine advertising.

His technique is to produce a summary measure called STAS (Short Term Advertising Strength) which represents

gain in market share of sales. A brand's market share of sales among households **not exposed** to its advertising during the seven days before a purchase is called the Baseline market share (for example, 10.0% share). Its share in households **exposed** to the advertising is the Stimulated market share (for example, 11.5%). The Stimulated share is indexed on the Baseline share, and this index is the STAS figure (for example, 115). For a campaign, the STAS figures for each week are averaged to create a campaign STAS. It is a good measure of the effectiveness of the advertising.

For measuring the STAS of television Jones used a year's data from A C Nielsen's single-source Household Panel [123]. He examined 78 fast-moving consumer goods brands across 12 product fields. The result, averaged across all 78 brands, was a television STAS of 118.

To measure the STAS of magazines Jones turned in 1998 to the most extensive body of single-source data

available on brand sales and magazine readership: 110,000 interviews by the Starch research company in the US during the years 1959-1964. [124]. They collected information on purchases of 73 packaged goods brands and exposure to 707 advertisements for these brands in the magazines Life and Saturday Evening Post. The outcome, averaged across all 73 brands, was a magazine STAS of 119.

The similarity of the television STAS of 118 and the magazine STAS of 119 is striking. The clear conclusion is that magazine advertising is equally as effective (per exposure) as television advertising, when each is used on its own.

Other case studies of the sales effectiveness of mixed-media schedules are given at www.hmaw.net – including Tim Tam biscuits in Australia [82] and, from JWT in USA, a packaged goods product [125].

41. TV & MAGAZINE CAMPAIGNS: RECENCY PLANNING

THE SIGNIFICANCE OF THE NRS READERSHIP ACCUMULATION DATA

The publication in 2004 of the NRS Readership Accumulation Study (see section 12) means that at last media planners can study magazines' week by week reach, and make direct comparisons with the weekly reach of television schedules. Agencies can plan print in the same way they plan television: through weekly rating points and weekly reach estimates.

Magazine advertising campaigns can be better designed to maximise reach at required times by phasing the insertions, and thus the time-released delivery of exposure, in the optimum way. For mixed-media strategies, the magazine element of the campaign can be integrated with the television or other media in an improved manner. The balance between reach and frequency, week by week, can be controlled more efficiently. All this will make campaigns more effective.

In addition the accumulation data will enhance post-campaign analysis of campaigns, leading to more precise accountability.

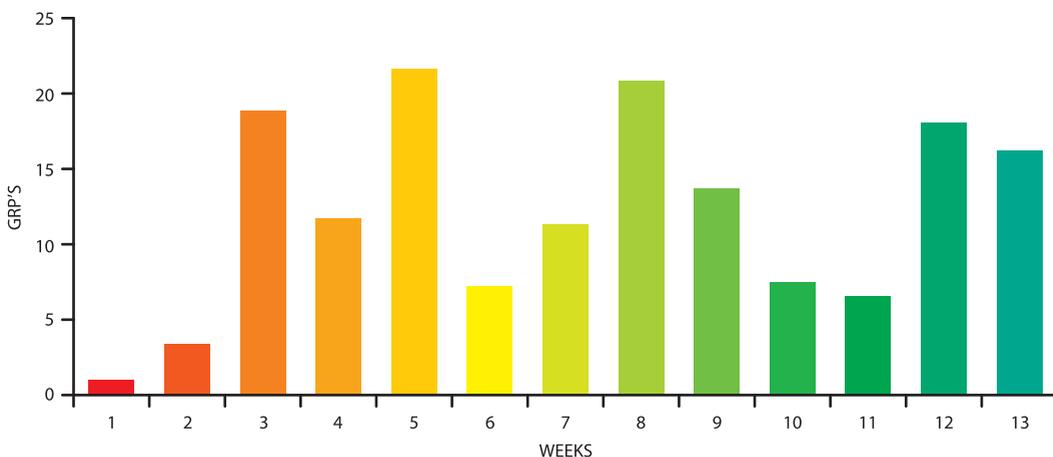
The well-known media philosopher Erwin Ephron, of Ephron, Papazian & Ephron Inc in the USA, said [quoted in 41] "The big step is to lose insertion planning and focus on how print delivers messages. The answer is 'over time'. We should use actual week-by-week audience delivery for planning, just as we do with television. We have all the data we need from the accumulation studies to place magazine exposures in time. It's our thinking that has to change." Kathi Love, CEO of MRI, commented [126] "Bringing print into the

media-mix has always been difficult because print has never been planned like television. TV planning sets a target reach goal each week to influence purchase decisions as they occur. Magazine planning hasn't had that option because the weekly data have not been available. It's been impossible to schedule print to meet basic week-by-week media objectives. So it's been difficult to put print into a media-mix plan with TV. Now it can be done."

The practical implications of the readership accumulation data were demonstrated in a presentation at the PPA Conference in 2005 by John Billett, chairman of Billetts, the media auditing company which monitors media planning strategy and performance on behalf of advertisers [127]. Until now, he said, magazine campaigns have typically been planned on the basis of when magazines are published rather than when they are read. On media schedule flowcharts, magazine issues are timed to plug the gaps according to on-sale dates. The result is that there is uneven delivery of advertising messages during the campaign period.

To illustrate, Billett gave the example of a real magazine campaign in 2004 which Billetts had analysed as part of their monitoring for the advertiser. The campaign had not been planned using audience accumulation data, but Billetts retrospectively analysed it in that way. The result was highly variable numbers of gross rating points by week, as the chart shows. In weeks 1 & 2, 6 & 7, and 10 & 11 there were 'black holes' with much less exposure than in other weeks. This is not what was implied by the neat-looking schedule flowchart displaying on-sale dates, nor what was intended.

Magazine campaign planned without using accumulation data: uneven weekly ratings



Yet by using the readership accumulation data, and making adjustments to the choice of magazines (mixing the frequencies), the timing of the issues, and the number of insertions, it is possible to deliver much more balanced weight by week. The consequence will be that the effectiveness of magazine campaigns will be increased and made more measurable.

In addition, planning magazines in the same way as television (i.e. weekly ratings and reach) will highlight what Billett considers to be "the current under-utilisation of the magazine medium." Billett provided evidence of under-utilisation by examining the largest 20 advertisers in magazines and in television, during January-December 2004, according to Nielsen Media Research. On average, the largest 20 magazine advertisers were achieving 600 target gross rating points (GRPs) during the year. In contrast, the largest 20 television advertisers were achieving on average 7,000 adult GRPs during the year.

Consequently the new ability to control weekly reach and GRPs for magazines as well as television, when planning mixed-media campaigns, will reveal that total campaign achievement will be improved by shifting more exposure (i.e. expenditure) into magazines.

Billetts' 160 advertiser clients accounted for 24% of all UK magazine advertising in 2004. All of these campaigns were planned by media agencies, and not Billetts whose role is independent auditing. When Billetts sampled 50 of the magazine campaigns they found that the average weekly delivery of ratings was just 9 adult GRPs. (There was a similar figure – an average of 8 adult GRPs per week – for the 20 brands examined in PPA's "Sales Uncovered" project.) This is equivalent to about 30 target GRPs per advertising week among the specific groups that the campaigns were targeting, when one allows for the ability of magazines to single out specific kinds of reader. Nevertheless this is far lower than the level typically considered viable for television campaigns, and indicates again that there is justification for heavier weights of advertising to be allocated to magazines.

In a separate analysis, Billetts sampled 100 of the magazine campaigns run in 2004 which Billetts monitored. They found that all 100 written plans presented figures for total campaign reach and average OTS but none showed weekly reach or ratings. The readership accumulation survey has not arrived too soon.

Some campaigns may have exposure continuing beyond the defined campaign period, at a low level, since some

magazine issues may achieve their tail of fresh readers several months after the publication date. It is possible to regard this late exposure as wastage, but in most cases it is still delivering valuable exposure for the product, and providing continuity in the advertising pressure. Equally, the accumulation data make it possible to assess for a given campaign the extent and timing of any carry-over from the previous campaign period – adding to the achievement in the current period. Moreover it is possible to limit the amount of carry-over of exposure beyond the end of the campaign period, if desired, through the selection of magazines (with an emphasis on weeklies) and the issues chosen.

The computer bureaux have written new software to handle the readership accumulation data, enabling users to input insertions week by week, and examine the weekly print ratings and coverage, as well as summaries for the whole campaign. Insertions can be moved around and the effects on performance viewed, so that weekly targets can be achieved as efficiently as possible, while overall campaign objectives are met with improved effectiveness.

DIMINISHING RETURNS TO REPETITION

The ability to plan magazine campaigns on a weekly basis – the same as for television - is particularly fruitful when one considers that many television campaigns reach the point of negligible marginal returns. The marginal money would be better spent in magazines, and it is now possible to analyse such mixed-media strategies more realistically than before.

Summing up extensive studies in America, John Philip Jones of Syracuse University, New York wrote in 2004 [128] "Advertisers spend most of their advertising dollars on television, which is the most unproductive medium available. It is unproductive precisely because it is the most heavily used medium. Diminishing returns operate on all uses of advertising media, and television advertising is boosted to such a degree of repeated viewing that the sales response is at the top (i.e. the least productive) section of television's advertising response function. The relatively low usage of print and radio by most major advertisers means that the sales response to these media is at the low (i.e. most productive) section of their advertising response curves."

There are several types of evidence about the marginal effectiveness of television advertising. A large-scale analysis has been published using data from IRI's BehaviourScan panels in the USA. Lodish & Lubetkin in 1992 [129] and Abraham and Lodish in 1990 [130]

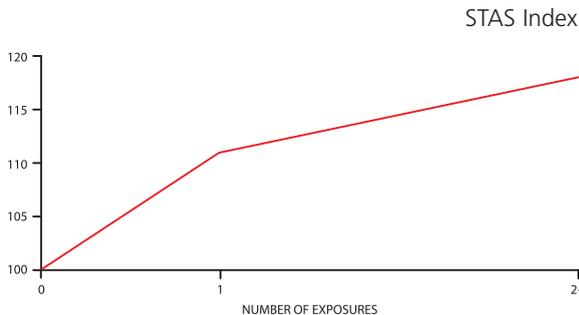
examined the results of nearly 400 tests carried out during the 1980s. This included 293 tests of television advertising weight. Their conclusion was that in half of the tests, an increase in television advertising produced no increase in sales. In other words, in half the cases the brand may already have been at or beyond the point of zero marginal returns from television advertising. It prompts the conclusion that some of the expenditure would have been better spent in another medium, such as magazines.

Further evidence published in the UK and USA has suggested from another point of view that it can make good sense for TV-only advertisers to allocate some of their TV budget to magazines. An analysis of USA Nielsen data by John Philip Jones [123], a 1995 re-presentation of Colin McDonald's classic 1960s study [131], research from Carat UK [132] and analysis by Andrew Roberts of the TNS Superpanel [133] all indicate that television advertisers often run bursts that are wastefully over-heavy, and some of the money would be better spent in other ways, such as magazines. This work is reviewed below.

At the heart of this are data suggesting that, in many cases, one or two TV exposures per week are enough.

NIELSEN DATA ANALYSED BY JOHN PHILIP JONES

John Philip Jones, whose calculations of Short Term Advertising Strength (STAS) have been described earlier, extended his analysis to look at television STAS levels at different numbers of exposures within a week. The result is shown in the following graph.



Jones wrote "The one thing that comes very clearly out of these analyses is that the first advertising exposure has much more effect than what is added by subsequent exposures." And again "The largest immediate sales response generated by advertising comes from the first exposure. Extra weight generates very few additional sales. For short-term sales, heavy

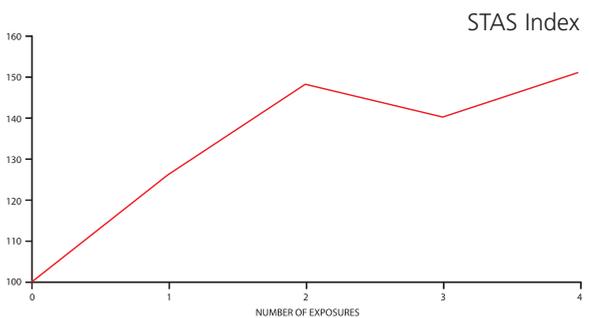
advertising has little more effect than light advertising weight."

Jones strongly argues in favour of continuity of media exposure, rather than concentration into a few short intense bursts. Continuity is desirable because advertisements work best of all if they are close to the moment of purchase, so advertisers should reach the audience when they're in the market to make a purchase right now. Events create needs: for instance, running out of cornflakes creates a need to buy some more. Since large numbers of families run out of cornflakes every week, it is advisable to advertise every week or as near to it as practical. The power of **recent** exposure to an ad has given the name 'recency planning' to the drive for continuity of advertising.

Jones' work has proved controversial and not everyone agrees with his analysis and interpretation of the data, but his broad conclusions about effective frequency are supported by the findings of others, three of which are outlined now.

RE-PRESENTATION OF COLIN MCDONALD'S DATA

Jones's work led Colin McDonald to re-present in Jones's format the key data from his (McDonald's) classic 1960s work into the short-term effects of advertising [131, 134, 135]. The result was the following diminishing returns curve, clearly in general agreement with Jones's findings:



The first OTS has more effect than the second, after which the impact of further exposures is negligible. (The dip for three exposures may be regarded as an artifact of small sample size.)

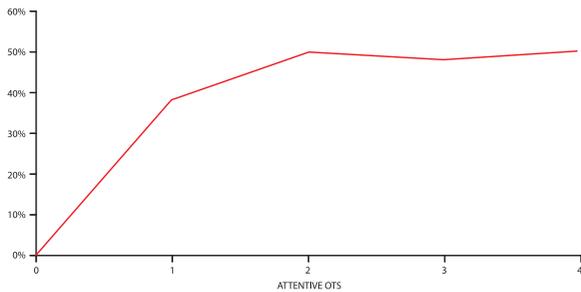
CARAT'S PENRITH PROJECT

Carat Research conducted a controlled experiment in the Border television region, which included Penrith as a

sampling point [132]. By buying all the airtime in four complete commercial breaks in the centre of high-rating programmes, transmitting the same five commercials in each break, and recruiting five different samples of adults, Carat were able to achieve five matched samples known to have had exactly 0, 1, 2, 3 or 4 opportunities to see the test advertising. The samples were asked questions about the selected programmes and all five commercials.

Carat reported that “the most important conclusion from this study comes from an analysis of frequency of exposure among product field users. The results clearly show that effective frequency can be achieved with very few exposures.” Branded recognition for Brand P was used to illustrate this point.

Brand P
Branded Recognition Among Product Field Buyers



The graph shows that “the advertising reaches a saturation effect after only two exposures”.

This particular level of exposure will not be suitable in all cases because different people are ‘affected’ at different levels, according to the circumstances, but nevertheless this diminishing returns curve closely mirrors the shape of the Jones and McDonald curves.

ANDREW ROBERTS’ ANALYSIS OF SUPERPANEL

Taking advantage of the single-source nature of the TNS Superpanel (described previously), Andrew Roberts of TNS reported on detailed analyses of 21 fmcg brands in eight markets, with the aim of looking at the short term effects of television advertising [133]. For each brand it was possible to find the relationship between the number of exposures to television advertising and the subsequent level of purchases. The saturation level could be calculated, where further advertising does not increase the propensity to buy the brand. Roberts concluded that “virtually all the results for the established brands show a convex curve, with saturation

effects typically after four or five exposures over four weeks.... If a brand is well established, then advertising will work primarily as a reminder, and repeated exposure at a frequency of more than about one per week appears to be of limited benefit.”

ARE ONE (OR TWO) TV EXPOSURES A WEEK ENOUGH?

All four of these sets of results point to one TV exposure per week, or perhaps two, being sufficient weight of television in many or most cases. After that the ability of further television exposures within the week to trigger sales falls away rapidly. Diminishing returns sets in quickly.

Yet there are TV-only advertisers who aim for higher weekly levels of exposure than this within a burst. It could be more effective for such advertisers to allocate part of their television expenditure in some other way.

It is true that one option is to spend it on television in those weeks that were not allocated any TV at all, thus converting to a ‘drip’ rather than a ‘burst’ strategy. But it would be more productive to switch some or all of the ‘excess’ TV-burst money into magazines, where the great advantages of a mixed-media campaign (already described) would be gained. The effectiveness of the whole campaign would be enhanced.

CONSUMER BUYING BEHAVIOUR: CONTINUOUS

In choosing magazines there is an additional advantage besides those of mixed-media communication and improved targeting: media continuity. For almost all brands there are potential buyers in the market at all times. Granted that a single exposure in the week before purchase can strongly influence which brand is purchased, and that second and subsequent exposures in the same week are less effective, then in general it makes sense to extend the number of weeks of advertising rather than pile on more repetition in the same weeks. (There are exceptions of course, such as launches.) No one knows which individual consumers are ready to buy in a given week, so try to reach as many different consumers as possible in order to catch the ones who are ready to buy. A single exposure can work because it is the latest in a series of brand messages seen; it works this time because the consumer is now about to purchase something.

Magazines are an excellent means of delivering continuous exposure. The cost per rating point of magazine advertising is substantially lower than for television advertising; consequently using magazines would extend the campaign period. Moreover a

magazine is read over a period of time; it is likely to be read more than once per reader, and by more than one reader. In an advertising campaign the life of a magazine schedule extends beyond the weekly and monthly publishing periods. After the primary readers have finished their reading the active life of a magazine campaign is extended by means of pass-on readers. The slow build-up of audience compared with other media can be a positive advantage. Continuity is a strength of a magazine schedule.

Shortly after this report goes to print, PPA will be publishing more information and analyses about recency planning. They will be found in brochures in the "Magazines Uncovered" series [72], on this report's website www.hmaw.net and on the PPA Marketing website www.ppamarketing.net



42. HOW TO SPLIT THE BUDGET BETWEEN TV AND MAGAZINES

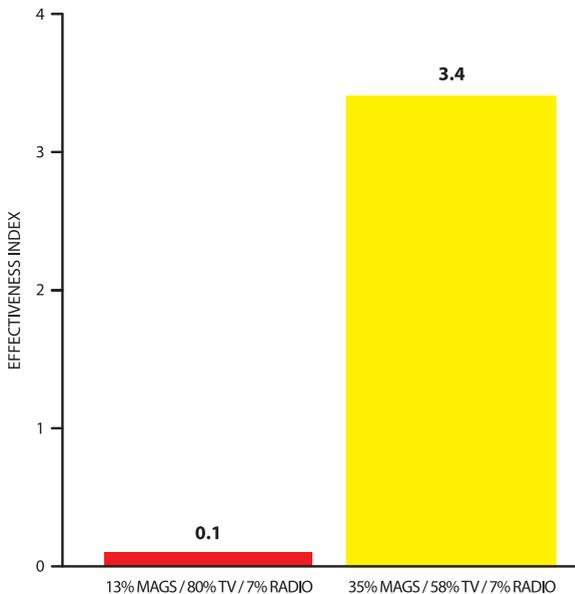
If television and magazines are to be used together, what proportion of the budget should go into magazines? Five pieces of evidence suggest that at least 25%-30% should go into magazines.

“MEASURING MAGAZINE EFFECTIVENESS” (MMA/MPA)

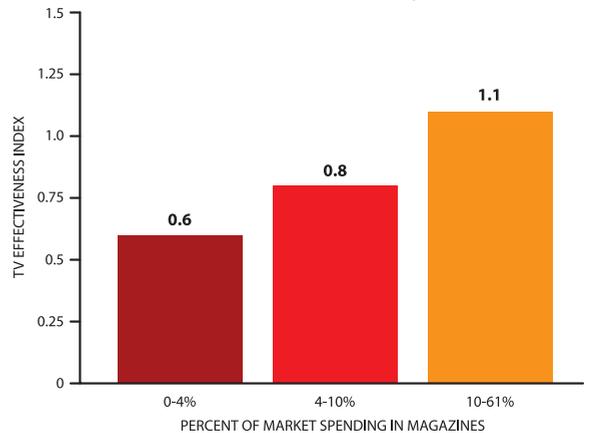
The MMA/MPA analysis [109, 110] already cited grouped brands according to their media mixes, and it was possible to compare the effectiveness of two patterns. One was a group of brands which spent about 80% of their budget on television, 13% in magazines and 7% on radio. The other group spent about 58% on television, 35% in magazines and 7% in radio. With radio's proportion the same in both groups, what was the sales effect of spending 13% versus 35% in magazines?

There was a dramatic difference. The brands allocating about 13% to magazines had an average effectiveness of only 0.1, whereas those spending around 35% in magazines achieved an average effectiveness of 3.4. It appears that there is a critical mass below which a medium has too weak a share of advertising for the synergistic benefits of mixed-media scheduling to fully take effect. 13% is evidently below that critical mass.

A Higher % In Magazines Increases Effectiveness



Television's Own Effectiveness Increases When More Magazines Are Used



“THE 30/30 SYNERGY STUDY”: SOUTH AFRICA

An analysis in South Africa concluded that at least 30% of the mixed-media budget should go into magazines. Advertisers who spent at least 30% of their budget in print and at least 30% in television achieved the best market shares of purchasing. Accordingly the analysis was christened “The 30/30 Synergy Study” [136]. The study was based on a cross-analysis of two kinds of information: the way that advertising expenditure was split between main media types, as monitored by the Adindex service; and market shares of purchasing as recorded by Nielsen. The first study covered over 1600 brands in more than 130 product fields, and analysed their data covering 1988 to 1990. The 1994 study covered 138 product fields and analysed their 1991-1993 data, and it reinforced the previous conclusions. The 1994 results were:

- Brand advertising works. Products which advertised outperformed non-advertisers, with an average market share of 31% for advertisers compared with an average 17% share for non-advertisers.

In a related analysis television-using brands were grouped according to the proportion of marketing expenditure devoted to magazines; then MMA studied

- Advertisers using two or more main media types (averaging 27.5% market share) outperformed advertisers using only one medium, whether that one medium was print (20.4% average market share), TV (17.4% average market share) or radio (15.6% average market share).
- This finding held true for market leaders, fast growing brands, static brands, and fast declining brands.
- It was also true when the top-spending advertisers were examined on their own. The 30/30 'synergisers' spending at least 30% in print and at least 30% in TV averaged a market share of 26.9%, compared with those using only print (18.0% average market share), only TV (18.0% average market share), or only radio (15.6% average market share).
- The findings were similar for the brands in the bottom third of adspend. The 30/30 synergisers' average market share was nearly twice that of brands using only print, or only TV, and nearly three times the market share of brands using only radio. The 30/30 policy works for small brands as well as big ones.

The South African study concluded that media strategists should approach media investment from a different perspective. Instead of adopting the point of view of "X is the most important media type - can we afford another?", the philosophy should be "Ideally we should use two or more media types to exploit synergy and increase market share".

HASSLOCH BEHAVIOURSCAN PANEL

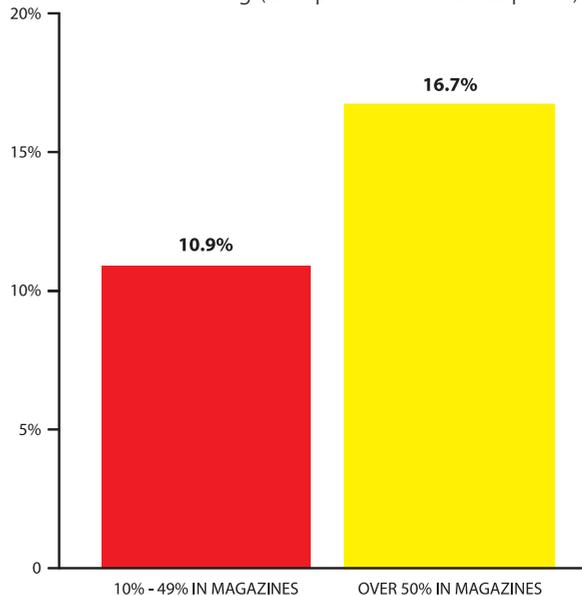
The single-source BehaviourScan panel in Hassloch, Germany [122], mentioned previously, was used to compare two different splits between television and magazines, in a controlled test. In one half of the test 70% was spent in television advertising and 30% in magazine advertising. In the other half 50% was spent in each medium, for the same total budget. The 50/50 split produced 17% more sales than the 70/30 split.

"SALES UNCOVERED"

In PPA's 2005 "Sales Uncovered" analysis of the TNS Superpanel (described earlier in section 23) the 20 campaigns were divided into those brands spending less than 50% of the budget in magazines, and those spending over 50%. In both cases, Superpanel members who were exposed to the magazine advertising increased their purchases (£) more than those who had not seen the magazine advertising. However the difference between the exposed and non-exposed

people was greater on average for the campaigns where magazines took more than 50% of ad expenditure (a difference of 16.7 percentage points) than those with less than half in magazines (a difference of 10.9 percentage points).

Budget Split: Percentage In Magazines
Sales Uplift Among Those Exposed To Magazine Advertising (Compared With Non-Exposed)



An additional analysis of Superpanel (see section 40) which was confined to seven mixed-media campaigns calculated that for every percentage point of the budget, magazines produced almost three times the amount of additional sales as television – at the budget split employed by those campaigns on average. 70% of expenditure went into television and only 22% into magazines. My conclusion was that 22% is too low a share of budget for magazines. With this budget split, television is operating well beyond the point of severe diminishing marginal returns, whereas magazine advertising is well short of that point.

MILLWARD BROWN / MPA

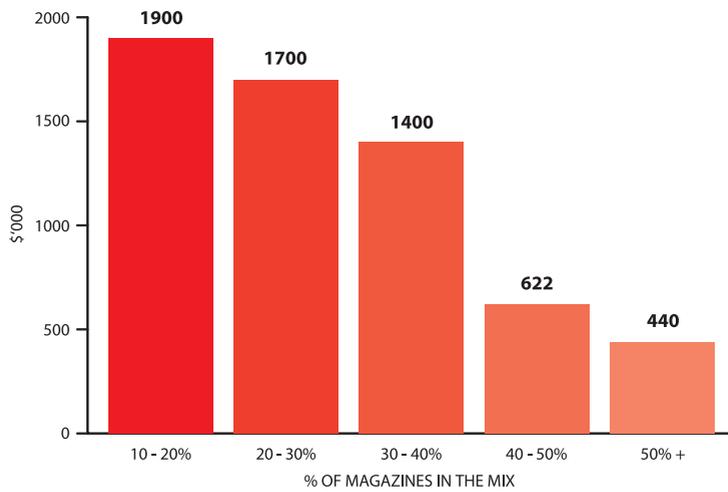
The studies discussed above were dealing with sales data. Millward Brown examined the question from the point of view of generating advertising awareness. This was the 113-brand analysis on behalf of Magazine Publishers of America [119] which has already been described.

The 113 brands were grouped according to the

proportion of the TV+magazines budget which was spent in magazines. For each group, Millward Brown calculated the average cost per awareness point for the campaigns in the group. It was found that the higher the proportion of the budget spent in magazines, the greater the awareness cost-efficiency. For instance, those brands using 80%-90% television and only 10%-

20% magazines were paying an average of \$1.9 million for every awareness point generated. At the other end of the scale, brands allocating 50% or more of the mixed-media budget to magazines were spending only \$0.44 million for every awareness point. The indication, once again, is that TV+magazines campaigns should allocate at least 30% to magazines.

Magazines Reduce Cost Of Generating Awareness
Average Cost (\$'000) Per Awareness Point



43. HOW TO FLIGHT THE TWO MEDIA

If television and magazines are both being used, should they run in parallel or should they run at different times in order to maximise the time-period which received advertising?

Logically they should run in parallel, because only then will be the creative content of the two media be able to interact and create communication synergy. Moreover theory is supported by hard evidence on this point.

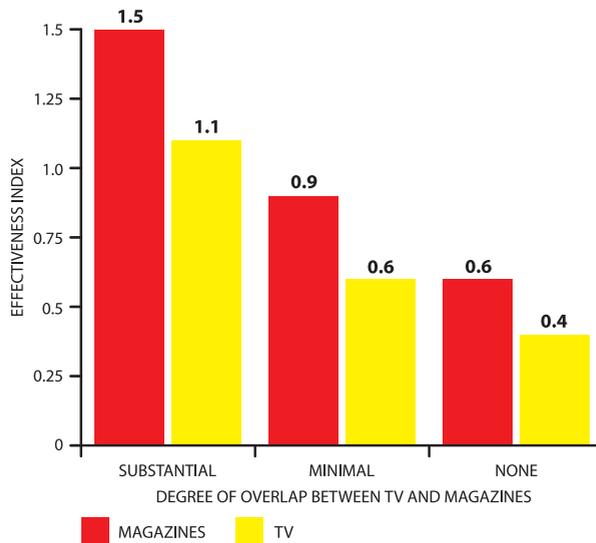
The MMA/MPA analysis "Measuring Magazine Effectiveness" [109, 110] cited previously analysed the weekly flighting of magazines and television at brand

level. Brands were grouped into three categories: those where magazines and TV did not overlap in time, those with minimal overlap, and those with substantial overlap. The results proved that the effectiveness of magazine and TV advertising – individually and jointly – rose the greater the degree of overlap in weekly scheduling.

(MMA's measure of 'effectiveness' was defined earlier.)

It can also be noted that for all three degrees of overlap, magazines were more effective than television.

Overlap Generates Best Results For Both Media



44. ADVERTISING IN A RECESSION

What is the best advertising strategy in an economic downturn? Professor Patrick Barwise of the London Business School has published an extensive review of the evidence on this [137]. He concluded that the most successful companies maximise long-term shareholder value by maintaining their advertising investment when the economy slows down and weaker competitors cut back. This enables them - at lower cost than when the total market is growing - to build market share. A prime reason for this is that if competitors cut back, those who maintain or increase their adspend achieve a higher 'share of voice'. Any reduction in these firms' short-term financial performance is typically soon outweighed by their increased revenue and profit growth when economic conditions improve.

Barwise argued that, regardless of economic conditions, every firm needs a clear strategy based on classic marketing principles - including how much to invest in advertising. These principles still apply when the economy slows down. The financial markets look for long-term shareholder value, not just short-term financial performance. If a firm has a convincing strategy it can keep investing in marketing even if the economy slows down, without a negative reaction from shareholders.

Based on the accumulated evidence, Barwise advocated three positive strategies for coping in a recession:

1. "Look for new creative, targeting, or media opportunities. In some contexts, the slower market conditions create new opportunities to emphasise different customer benefits or segments.
2. "Strengthen your market position against weaker rivals. The research shows clearly that the strongest, most successful firms can use the opportunity of an economic slowdown to attack their weaker rivals.
3. "Keep going. Arguably this is the best strategy of all. It is based on the idea that long-term shareholder value comes from excellent strategy executed consistently over many years. The concerns about recession - that customers may spend less on the category, that short-term financial performance may be under pressure - are balanced by the advantages - that the same adspend gives a higher share of voice and that the financial markets will support a long-term strategy if they find it credible."

More evidence that it pays to continue advertising during an economic recession [138, 139] is given at www.hmaw.net

45. WEBSITE FOR 'HOW MAGAZINE ADVERTISING WORKS'

A new feature of this fifth edition of 'How Magazine Advertising Works' is that the report now has its own website, www.hmaw.net

The website has several purposes:

- To present updates and new research published since this report went to print.
- To provide more in-depth findings about certain surveys mentioned briefly in this report. In some cases this includes the facility to download reports or brochures.
- To accommodate additional useful evidence for

which there was not room in the report. Some of this is material removed from the fourth edition which has been superceded by newer evidence but which still has some add-on value.

- To present basic details of the methodology of research studies quoted in this report.
- To enable users to download a pdf file of the full report.

Other related sources are PPA's site at www.ppamarketing.net and, for international evidence, FIPP's website at www.fipp.com/research (whose Research section I edit).



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Among other current assignments, he is research consultant to PPA. Other reports he has written for PPA include 'Measuring Advertising Effectiveness', 'The Essential Medium: decision makers usage of B2B magazines' and 'The Vital Investment: why it pays to advertise in B2B magazines'. These, and a range of his other published work, can be accessed via his website (address below).

Guy has many years' experience of consumer and business magazines, both as a consultant and in various roles within publishing houses and advertising agencies. Before founding his consultancy he was Director of Research at International Thomson Publishing Ltd, at that time one of the leading UK magazine publishers,

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He began his career in major advertising agencies, where his roles included Media Research Manager, International Media Manager, and Media Group Head. In the latter function he was responsible for the media planning on many of the agency's accounts. During this period he served as Chairman of the Media Research Group.

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