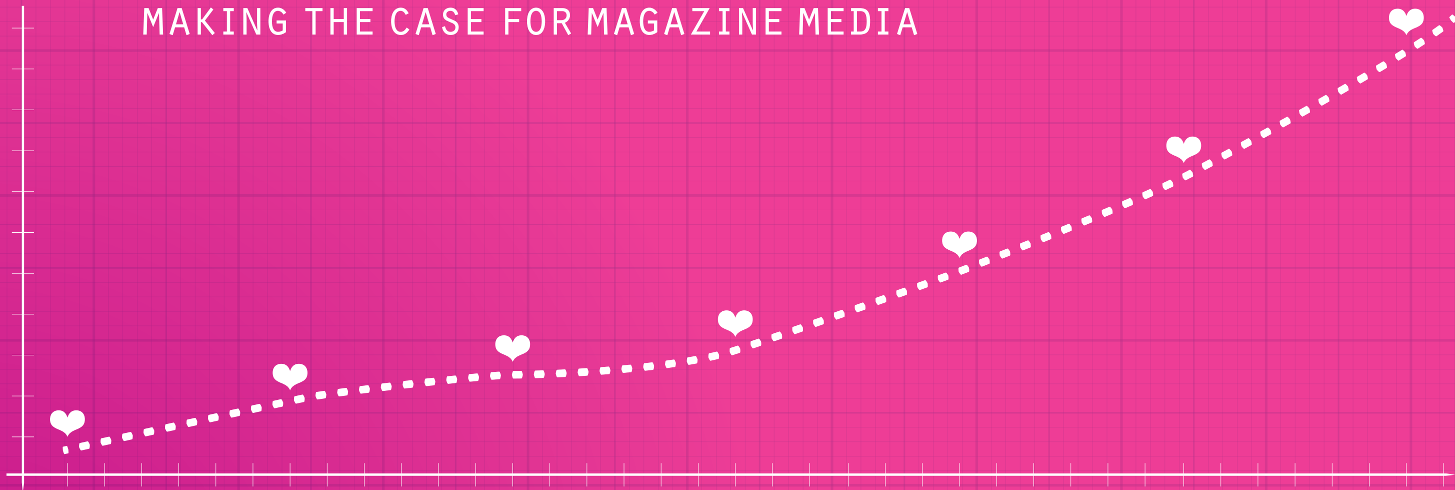
PROOF OF PERFORMANCE

V2

MAKING THE CASE FOR MAGAZINE MEDIA



GUY CONSTERDINE

FIPP INSIGHT

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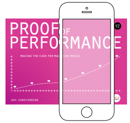

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FIPP INSIGHT

A FIPP INSIGHT report

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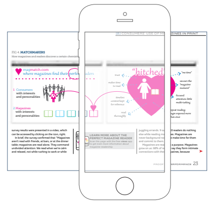

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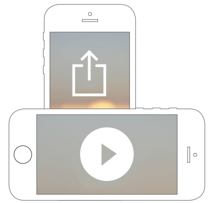

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contents

Strength in numbers

Chris Llewellyn, FIPP CEO, relishes the wealth of new data emerging from sharp-witted research outfits across the globe. They make a strong case indeed for advertising in magazine media.

While much of the world's attention in June 2014 was centred on the World Cup soccer festival in Brazil, for two days in the middle of that month, FIPP's annual Research Forum took place at the home of Gruner + Jahr in Hamburg. Here, the magazine media world's research experts were gathered to hear about exciting new research projects – about how the 'connected consumer' engaged with media brands and reacted to advertising messages.

As each case study was presented, once again it was underlined that despite everyone claiming 'their market is different' research results indicated very firmly that the consumer's relationship with magazine media brands was remarkably similar, be they from India, the USA, Belgium or Australia. While methodologies and precise measures will differ somewhat, the broad findings and trends are extremely consistent – namely that magazines, compared to most other media, have the most intimate and engaged relationship with their audience; that their audience trusts them more than any other medium; that advertising is seen as a core part of a magazine offering, and accordingly that they deliver brilliant ROI's for their advertisers.

This year, however, there was another common and exciting theme emerging from several new studies that showed how the 'connected consumer', people who move seamlessly between a magazine's print, online, tablet and smartphone platforms, reacted to and engaged with advertising content in magazine brands. And with a nod to the Media Multiplier research of some decades ago that discovered that advertising effectiveness increased if a mixture of media platforms were employed, to no one's surprise it was discovered that this still holds true. What was exciting though were the indications that advertising that employed a mixed media strategy across the same brand had even stronger responses from the consumer.

So lots of new research, lots of new insights and behaviours to examine, and, dare I say it, lots of good news for the magazine industry. This is ever more reason for FIPP to continue to search out and give a voice to all the great work going on.

In 2012, FIPP, whose mission is to share knowledge and identify and communicate emerging trends to our members, the world's most important magazine media groups and associations, commissioned the eminent media research consultant, Guy Consterdine, to review and interpret all the many new advertising effectiveness studies that were emerging at that time.

Since the advent of tablets in early 2010, and the rise of digital and online editions of magazines, there had been an explosion of new research examining how advertising

> There has been an explosion of new research on advertising and consumer behaviour in the new print/ digital paradigm

and consumer behaviour was operating in the new print/digital paradigm. The result was a 116 page report, *Proof of Performance*, its sub-title, *Making the Case for Magazine Media*, an analysis of literally hundreds of research reports from all over the world that set out the evidence of the effectiveness of magazine media advertising.

Our aim was to create a tool for anyone involved in the planning, selling and buying of advertising, and our promise was to keep updating this report every two years to incorporate new findings. The 2014 edition is here, and with seismic changes in media consumption happening, it's even more relevant in explaining just how effective and engaging magazine brands are.

As in the first edition, I must thank Guy for the immense amount of work he has put into *Proof of Performance*, and also my colleague Helen Bland who has driven this project brilliantly. Last but not least, I must thank the many researchers and their companies from all around the world who have allowed FIPP access to their material.

Digital data confirms readers' love affair with magazines

It's clear that there is ample 'proof of performance' for magazine media, in print and digital formats. The following pages illustrate the compelling evidence.

The speed of change in publishers' digital and print activities in the last two years has been matched by the pace of new research into the medium. So much new information has been published about consumers' use of magazine digital and print platforms, and the effectiveness of the advertising they carry, that this second edition of *Proof of Performance* (*POP v2*) is more a new book than a mere updating of the first edition.

The principal objectives of this book remain:

- to review some of the research-based evidence on how consumers are using printed and digital magazine content around the world;
- to demonstrate the effectiveness of the advertising these media carry;
- to present a narrative of the case for magazine media, a narrative which will apply in any country and could be populated with local research evidence; and
- to stimulate ideas for publishers and others in planning their own research programmes.

The space given to digital media has been greatly expanded compared with *POP v1*. There is an introductory chapter on connected consumers to set the scene. Digital editions now have their own separate chapter, as do publishers' websites. An entirely new chapter has been written on social media.

There is much new research on print magazines too, confirming that print is still relevant and powerful for consumers and advertisers alike in the shiny new digital age. The evidence shows that printed magazines will remain a significant form of publication, although only one of many. For most publishers of consumer magazines, print is still the major source of their audiences and revenue. Consequently the book begins (after the introductory chapter on connectedness) with two chapters on magazines in print.

After an examination of each major platform individually, there are three chapters showing the outstanding effectiveness of the advertising in magazine media. Very often magazines prove to be the most cost-effective medium, delivering the highest return on investment of all major media.

The book concludes with a chapter on the importance of econometric modelling of the contribution each medium makes to a marketing campaign's effectiveness. There is a need to take steps to ensure that the most suitable magazine data are used in the models, to prevent magazines' contributions being significantly under-estimated.

The phrase 'magazine media' is used throughout this book. It refers to all the platforms on which publishers with a print-magazine background are now publishing their editorial and advertising content. 'Magazine media' means the brand. In the simpler days when magazine publishers only published on paper, and any other activities such as exhibitions or other events were regarded as very subsidiary, it was sufficient to describe the medium as 'magazines' and everyone knew what was meant.

Today the word 'magazines' can be ambiguous; is it referring to the printed form only, or print plus digital and other media? We need another term to describe the latter. In time another phrase may emerge as companies evolve further, but for now 'magazine media' will serve.

The positive outcomes of the research reviewed here show that there is a very bright future for content-publishing companies. There is an easy answer to those who ask "Is print dead?" No, it most certainly isn't. It will remain an important medium but it will progressively play a less dominant role in the activities of companies formerly known as magazine companies.

Print is still relevant and powerful for consumers and advertisers alike in the shiny new digital age.

I cite research from more than thirty countries, and it is clear that consumers throughout the globe behave in much the same way as far as print and digital magazine usage is concerned.

I thank all those who have brought their own research to my attention. Space does not allow me to describe the methodology of each study, but the reference section directs readers towards further information.

I quote more than 120 sources, and half of these were published in 2014 or 2013, while only 14% date from before the arrival of the iPad in 2010. In order to accommodate the most recent surveys from around the world, I have removed much of the earlier research which appeared in the first edition of *Proof of Performance*. However many of those studies remain highly relevant, and *POP v1* is still downloadable from the FIPP website at www.fipp.com/POP.

Finally, I would like to thank Esther Braspenning of The Ppress, Belgium, who chairs the FIPP Research Committee, for her constructive comments on reading the draft of *POP v2*.

GUY CONSTERDINE
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October 2014

EXECUTIVE SUMMARY

01 CONNECTED CONSUMERS AND THE 24/7 MEDIUM

- Consumers are connected to magazine brands across multiple platforms, seamlessly mixing old and new. This deepens the reader relationship, and consumers' receptiveness to the advertising. The emotional ties with magazine brands are strengthened.
- Consumer demand for magazine media content remains strong. While print remains dominant, the audience profile is moving towards the digital platforms.
- Advertisers are offered an even more enticing proposition.

02 CONSUMERS' USE OF MAGAZINES IN PRINT

- Readers choose magazines whose personalities and interests match their own. It creates an involved trusting relationship, like a friend.
- This means attentive, thorough and repeated reading – often in a 'magazine bubble' of me-time.
- Readership accumulates through time.

03 IMPACT OF ADVERTISEMENTS IN PRINT

- Advertisements in printed magazines are a valued part of their contents, because readers have chosen their magazines, and so have the advertisers. Relevance for readers means targeting for advertisers.
- Magazine readers are highly engaged, which increases the effectiveness of the advertising. Readers notice and take action after seeing relevant ads.
- Creative formats such as gatefolds, scent strips and advertorials can further enhance response.
- Readers are moved further along the journey towards purchase.

04 DIGITAL EDITIONS

- Digital editions are a growing though still small proportion of total circulation. They are liked for their portability, easy access and interactive features.
- Digital readers are an attractive target audience for advertisers: well educated, affluent and relatively young.
- Consumers use digital editions in much the same way as they use printed magazines, but interactive features mean a longer read.
- Readers become deeply engaged with their digital magazines, and are receptive to digital advertising. Digital ads perform as well as, or even better than, print ads, including provoking action.

05 PUBLISHERS WEBSITES

- Publishers' print editions and websites complement each other.
- Innate values of the print brands, such as trust, transfer onto their websites and rub off onto the ads
- Publisher websites' self-selected audiences means the ads have high relevance to the sites' visitors.
- Original content sites perform better for advertisers than portals or social networks.
- The multiplier effect from using a brand's print and website properties improves key performance indicators.
- Advertising on magazine websites lifts sales significantly.
- Magazine sites are a natural home for native ads.

06 SOCIAL MEDIA

- Magazine brands sit at the heart of many social communities, and are a natural route through which marketers' messages can be channelled.
- Magazine readers are enthusiastic users of social media.
- Compared with the adult population, magazine readers are more likely to follow their favourite brands, participate in the conversations, make recommendations, and take action as a result of recommendations. They are Conversation Catalysts.
- Digital conversations are also stimulated, and to a high degree, by premium content websites such as magazine websites.

07 COMPARING MAGAZINES AND OTHER MEDIA

- All media have strengths, and a mix of media produces the most complete communication.
- Consumers develop personal relationships with magazine brands. Consequently magazines' strengths compared with other media are to do with engagement, inspiration, trust and practical use.
- Other strong assets include low multi-tasking, and high primary attention.
- Magazine advertising is not regarded as interruptive or unwelcome. It has the ability to induce action and purchase.

08
CAMPAIGN EFFECTIVENESS: KEY PERFORMANCE INDICATORS (KPIs)

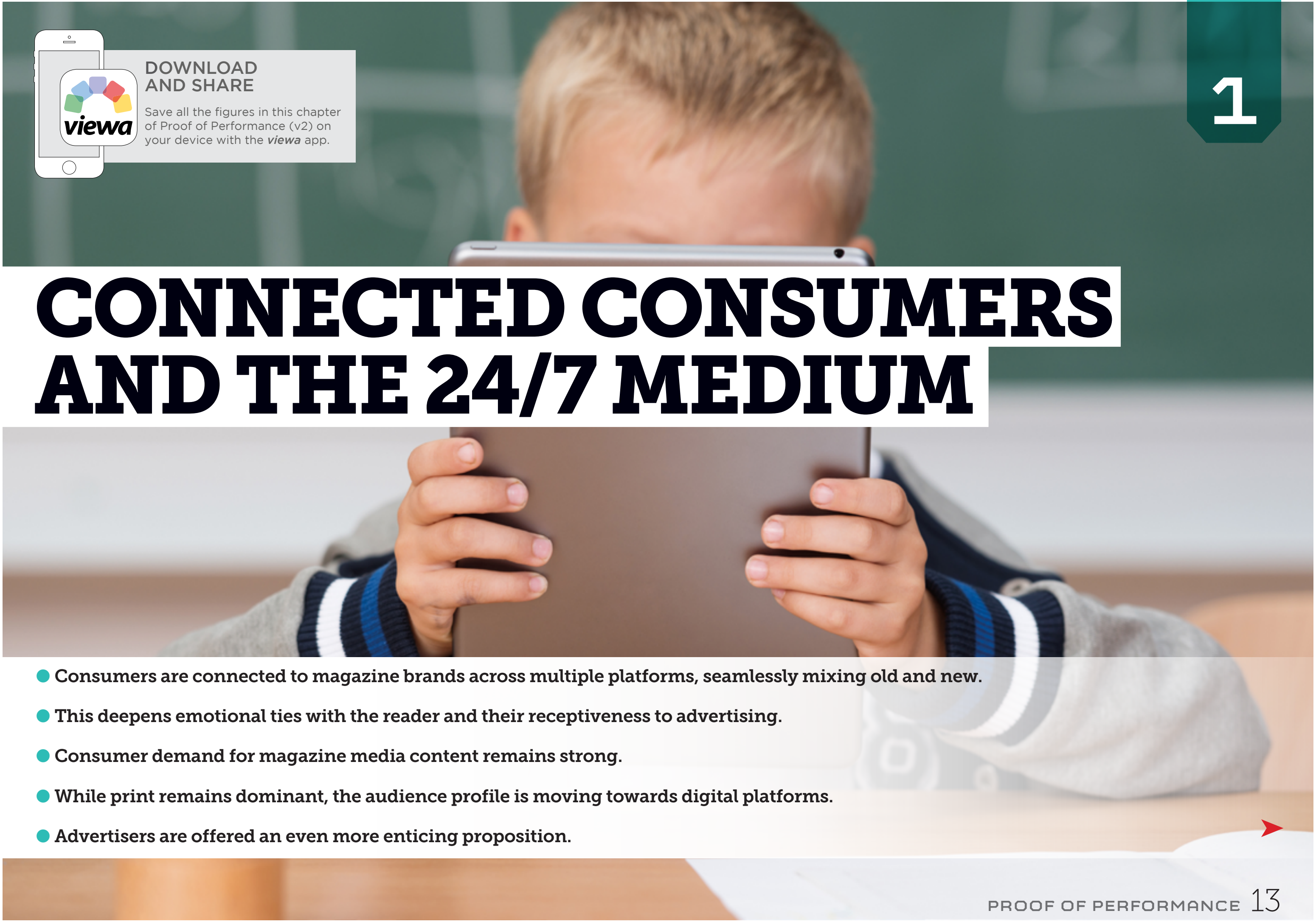
- Magazine media make a big contribution at all stages of the consumer journey.
- The natural synergy between media means that when magazines are combined with other media a beneficial multiplier effect occurs. For example, magazines make TV and online work harder.
- Adding magazines to a media mix campaign improves campaign KPIs.
- Calculations of ROI show magazines among the most cost-efficient media.

09
CAMPAIGN EFFECTIVENESS: SALES

- Controlled tests show substantial sales uplifts from magazine advertising. It applies to new and established products, and to short-term and longer-term measurement.
- Magazines deliver high ROI – on average, higher than TV.
- Usually this is related to under-investment in magazine advertising.
- For many campaigns, expenditure on TV goes beyond the point of severe diminishing returns. The marginal money would be better invested in magazines or other media, which would generate more sales.
- It would pay to at least double the current investment in magazines, in mixed-media campaigns featuring TV.

10
USING ECONOMETRIC MODELS TO ASSESS MEDIA EFFECTIVENESS

- Econometric modelling is increasingly used for guiding media strategy decisions.
- Magazines can benefit, yielding very competitive ROI, providing the right inputs are used. This includes weekly ratings, and readership accumulation data. Without these two elements, ROI in magazines is liable to be underestimated by around a fifth or more.
- It is vital to have a process for making it easy to feed the relevant magazine information into models.



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1

CONNECTED CONSUMERS AND THE 24/7 MEDIUM

- Consumers are connected to magazine brands across multiple platforms, seamlessly mixing old and new.
- This deepens emotional ties with the reader and their receptiveness to advertising.
- Consumer demand for magazine media content remains strong.
- While print remains dominant, the audience profile is moving towards digital platforms.
- Advertisers are offered an even more enticing proposition.

MAGAZINE PUBLISHERS have evolved into multi-platform content providers – no longer just printed magazines, but print complemented by many digital manifestations such as digital editions, websites, apps and social media. Moreover they are accessed by a range of devices including laptops, PCs, tablets, e-readers and smartphones. In addition many magazine brands also offer content through additional channels including television, radio or events. This is what is meant by the term ‘magazine media’.

Multi-platform usage amplifies the strength of the relationship between reader and magazine brand. It also amplifies receptiveness to the advertising.

Choice in platforms has turned magazines into even more of a 24/7 ‘always on’ medium. Of course it was always possible to read a printed magazine at any time, but now the medium also offers content presented in different ways, accessible via additional devices. This has extended the use of magazine editorial and advertising content in the home, at work (through all the digital devices), and while travelling or on holiday (especially through smartphones and tablets).

The *Connected Consumers* study presented by the UK’s IPC Media in 2014 [reference 1] looked at this in detail by interviewing more than 3,500 consumers about their experience of using seven of IPC’s core multi-platform brands. One of the most striking findings was the extent to which readers’ engagement (for which printed magazines are renowned) transfers across to magazine brands’ digital platforms too.

Consumers seamlessly mix old and new platforms. People still draw inspiration from what they read in their magazines, pass on recommendations to friends and family, and so on, but what has changed is that magazines now offer consumers more opportunities to do this across a range of platforms. This reinforces the power of magazine brands, irrespective of platform. The result is that all the platforms and devices can play significant roles in influencing consumers throughout all stages of decision-making, including decisions about purchases.

Connected Consumers survey showed depth to which deep reader engagement transfers from print to digital

The way consumers turn to magazine brands at multiple times throughout the day, for a variety of purposes, and using a range of platforms, means that there are three states of mind in which consumers use magazine brands. The *Connected Consumers* study described them as:

» **Catch-up time** Typically (though not only) in the morning when catching up on happenings. Critical in this mind-state is ease of access and the ability to get reliable and trusted updates to bring them up to speed quickly. Magazine apps, websites and social media are particularly relevant here.

» **Focus time** Typically during the day when consumers tend to be more time-deprived. They know what information they want and they know how to get it. Magazine apps, websites, social media and print all fulfil this need.

» **Down time** It’s for escapism, and is when consumers are at their most receptive to advertising. Typically in the evening, when people are relaxing or the children are in bed. Content is accessed across all platforms.

There is a relationship, among magazine multi-platform users, between where they are and the platforms they are likely to use, heavily or lightly. Figure 1 illustrates it. Clearly, the new

FIG 1. **WHERE I AM AFFECTS THE CHANNELS I USE**

Base: Multi-platform users of 7 IPC brands: Marie Claire, InStyle, Ideal Home, Woman & Home, Now, Look, NME
Source: Connected Consumers, IPC Media, UK, 2013

“My iPhone has everything I need. It’s my mp3 player, contacts, diary, internet connection, alarm clock, camera. I don’t know any other bit of kit that would replace this – and it fits in my pocket.”

Respondent on IPC Origin Panel, UK, 2013 [1]

digital platforms are extending the reach and influence of magazine publishers’ content.

The digital channels are also enhancing people’s satisfaction with magazine brands. *Connected Consumers* found high satisfaction levels among readers who only access a brand through one platform but even higher levels of satisfaction among those who accessed more than one platform. Essentially, the more platforms used, the higher the satisfaction with the brand.

Using more than one platform creates a multiplier effect.

Consumer demand for magazine media content is growing

A new form of analysis called *Magazine Media 360º*, first published in September 2014 by MPA – The Association of Magazine Media [2] in the USA, is an apt complement to the insights provided by the *Connected Consumers* study.

Magazine Media 360° puts several sources together to quantify the changing balance of usage of magazine platforms. The statistics, taken from recognised industry currencies, show consumer demand for magazine content across multiple platforms and formats: print/digital editions, websites (laptop/desktop/mobile) and video. The tables show figures for 147 magazine brands which account for an estimated 95% of the reader universe. (From October 2014, audiences on social networks will also be shown, but separately.)

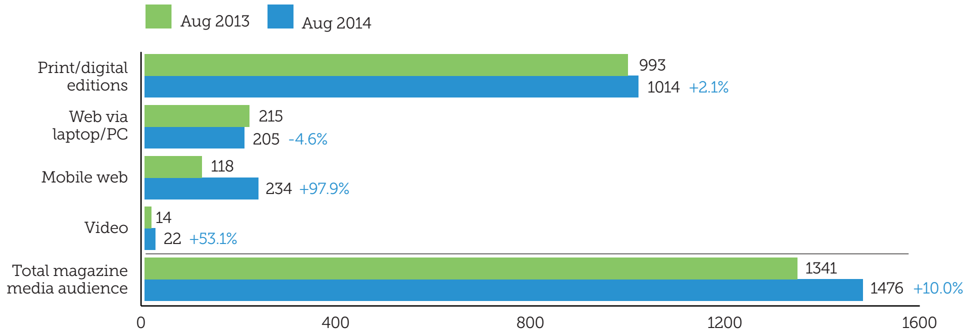
The inaugural report shows that the consumer demand for magazine media content increased by 10% from August 2013 to August 2014, to a gross audience of 1.5 billion for the 147 brands.

For print and digital editions combined, their gross audiences were 2.1% higher in August 2014 compared with a year earlier. Yet their share of total audience fell to 69% compared with 74% a year before, because of the sharp rise in audiences to mobile web and video.

The MPA's 360° project quantifies the changing balance of usage of magazine platforms

Figure 2 shows the audiences for each of the four platforms, in August of 2013 and

FIG 2. **GROSS MAGAZINE MEDIA AUDIENCE BY PLATFORM** (millions)



Source: Magazine Media 360°, MPA – The Association for Magazine Media, USA, 2014

2014. Year on year, the profile of the audience has been moving towards the digital platforms. It is also notable that the web audiences are becoming more mobile, with smartphone/tablet access doubling while the more static PC/laptop access has fallen by 5%.

The 10% growth of total consumer demand in a single year proves the vitality of magazine brands. Collating audience data from all platforms in this way helps to shift the conversation with marketers from just print to magazine media as a whole.

More smartphones and tablets means more communications

In countries all round the world there is a similar pattern of strong consumer demand for magazine media while the profile of contact points is shifting towards the digital platforms. For example, in the UK the growing importance of the digital platforms has been underlined by the *2014 Communications Market Report* published by Ofcom [3].

The average UK adult now spends more time using media or communications (8 hours 41 minutes) than they do sleeping (8 hours 21 minutes). Smartphones and tablet computers are at the heart of driving the increase in communicating. 61% of UK households have a smartphone in 2014, compared with 51% a year earlier. 44% of households have a tablet, compared with 24% a year earlier, an astonishing increase in a short time.

Adults of all ages are embracing newer services and taking advantage of portable connected devices. The connected consumers are connecting even more.

People are squeezing more into their days by multi-tasking on different devices and media; thus gross use of media and communications averaged more than 11 hours a day, squeezed into those 8 hours 41 minutes of activity. The 11 hours per day contrasts with 9 hours in 2010, with the increase driven primarily by smartphones and tablets.

At 61%, the take-up of smartphones has almost matched that of laptop computers (63%) in UK households, and it is significant that the very non-portable desktop PC is in decline, down to 35% of households in 2014 from 44% in 2012. When desktop machines need replacing they are replaced by portable ones.

The 'Millennium Generation' – those born around the year 2000 who are now in the 12-15 age group – are developing significantly different communications habits from those of older groups including the 16-24 year olds. The Millennials are the first generation to have grown up with fast broadband, and most will not have known dial-up internet. They use their smartphones a great deal but barely for 'phoning': only 3% of their communications time is spent making voice calls, while 94% is text based, especially social networking and instant messaging. By contrast, older age groups spend a much higher proportion of communication time on voice calls (20% all-adult average), and their principal text-based communication mode is emails.

> **"AN EXCLUSIVE CLUB FOR THE PRICE OF A BUS TICKET..."**
>
> "A magazine has never been about the paper it was printed on. Publishers may have organised their businesses around selling the stuff, but real magazine brands are more like exclusive clubs that anyone can join for the price of a bus ticket.
>
> "To feel part of a family, to have the ideals of a title reflected onto the reader just by opening a page, that's what's really valuable. I'm now happy to read just about everything on my phone, but when I want the world to see who I really am, I let them know I'm a *New Yorker* reader."
>
> Andy Cowles, Editorial Development Director, Coverthink Media, UK, 2014 [4]

An enticing proposition

These trends in the USA and UK are matched in most other countries, and of course they have enormous implications for publishers of magazine content. But although disruptive change is difficult to manage, there is a very positive prospect for those publishers who achieve successful adaptation.

The extension of printed magazines into digital channels benefits not only readers but also advertisers. Magazine media can offer advertisers an even more enticing proposition.

Platform by platform

This overview of the connected consumers, and their demand for access to magazine media content on a variety of platforms, sets the scene for the next few chapters, which look separately at each of the principal platforms which publishers are using – first, print, because it still accounts for the great majority of audiences and revenue, for most consumer publishers; then digital editions, websites, and social media.

2

CONSUMERS' USE OF MAGAZINES IN PRINT

- Readers choose magazines whose personalities and interests match their own.
- It creates an involved trusting relationship, like a friend.
- This means attentive, thorough and repeated reading – often in a 'magazine bubble' of me-time.
- Readership accumulates through time.

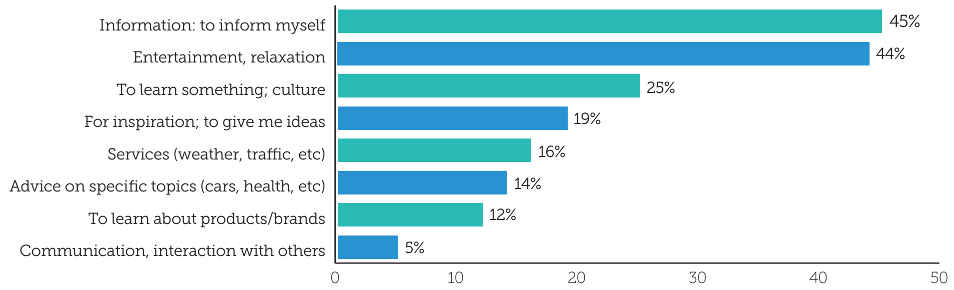
EACH MAGAZINE has its own personality. The magazine medium's essential strength lies in the active way in which readers choose and use their magazines, and how they find titles which connect with the personal self. Printed magazines call for active participation, with the reader in control of decision-making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

Different categories of magazine fulfil different needs, and therefore work in different ways, all of which adapt to the needs and interests of their readers. Similarly, within any given category of magazine, there are vital distinctions of character, focus and function between individual titles, giving each publication its own unique positioning. This specialisation means that each magazine has its own personality. Consumers can therefore choose those magazines whose personalities most closely match their own.

'Refreshing me-time': one of the many motivations among Indonesian readers for reading Femina

FIG 3A. **MOTIVATIONS FOR READING MAGAZINES (1)**

Reasons applicable to the last occasion of reading magazine



Source: The Magazine Experience, IP Plurimedia, Belgium, 2012

Motivations for reading magazines

This is reflected in the range of motivations for reading magazines. A recent example comes from research in Indonesia among readers of the weekly *Femina*, *Usage of Multiple Platforms Of A Magazine Brand* [5]. When readers were asked the reasons for saying *Femina* magazine was important to them, the principal responses were:

» The magazine tells you many things
» Tips and information
» The up-to-date nature of the information
» It helps me relax when I get home in the evening
» It is me-time
» It is refreshing
» Can read the printed magazine at any time

Another look at motivations was provided by *The Magazine Experience* survey in Belgium, published in 2012 by IP Plurimedia [6]. A list of eight possible motivations for using media of all kinds was drawn up, and a large sample of French-speaking adults was asked which motivations applied to their use of French-language media. The results for magazine readers are presented in Figure 3a.

As in Indonesia, in Belgium the motivations primarily centred around information-seeking, relaxed entertainment and being inspired.

In neighbouring country The Netherlands, a qualitative research project called *Delivering The Message Through Magazines* was commissioned by magazines.nl, an initiative of the Dutch publishers organisation, presented in 2013 [7]. It found six principal motivations for reading magazines:

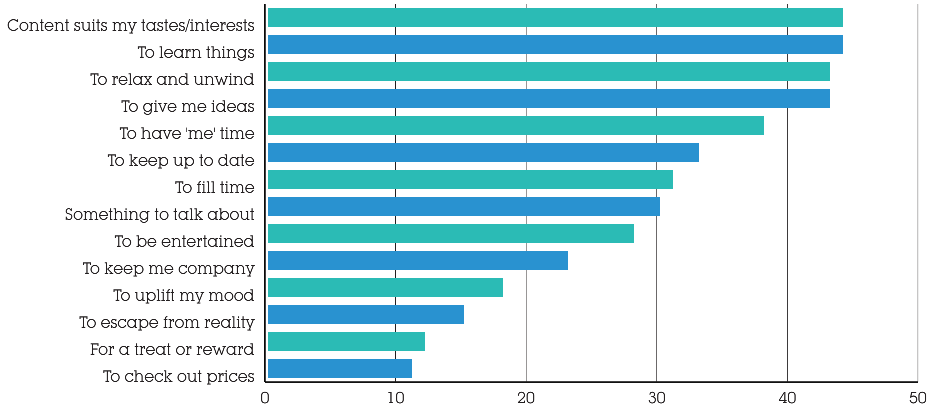
» **Individual**: intimate; me-moment
» **Relaxation**: relaxed reading, clear framework
» **Curation**: editorial team selects the content for you; you receive surprises, serendipity
» **Depth**: you can dive into stories
» **Reliability and trust**: you know who is behind a story
» **Tangibility**: you can always pick it up again

A not dissimilar pattern had emerged from an earlier study in 2010 by Carat's *Consumer Connection System* in the UK [8]. It looked at 14 different motivations, among regular readers of magazines. For the average magazine the four most frequently mentioned motivations were 'to give me ideas', to learn things, to relax and unwind, and 'the content suits my tastes and interests'.

Figure 3b ranks all 14 motivations. It underlines what a wide range of motivations exist, ranging from the practical to the emotional and indulgent.

FIG 3B. **MOTIVATIONS FOR READING MAGAZINES (2): AMONG REGULAR READERS**

% claiming each motivation



Source: Carat Consumer Connection System, UK, 2010

An equally striking thing about the results was the variations by gender, sex and other consumer characteristics. A further factor is that different categories of magazine, and within that category different individual publications, serve different profiles of reader needs and motivations – some titles primarily giving practical advice, some focusing on emotional support or escapism, and so on. Taking these two things together – great variation in motivations among consumers, and great variation in the offerings by publishers – brings us back to an earlier conclusion: that whatever kind of person a consumer is, whatever their interests are , there is a magazine which fits that combination of interests and motivations. This naturally leads towards a reader having an emotional attachment to a magazine which matches his or her own personality and situation.

A personal relationship

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

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

In essence, readers have their own self-image of the kind of person they wish to be; certain magazines chime in with this self-image, and that will create a high level of identification with the magazine. The readers develop a feeling of ownership, a sense that this is 'my magazine', an informed friend. The magazine in turn helps its readers to become the kind of person they want to be. The magazine is thus aspirational and enabling, and the readers feel "I have a powerful and trusting relationship with my magazine".

It is a relationship that is impossible for other media to fully replicate.

Many recent surveys bear this out – for example, a study among readers of *Cosmopolitan* in Malaysia [9] – see Panel 1.

"A cup of tea, two cushions in my back, and I can start reading my magazine. I won't pick up my phone. I don't want to talk to my husband. I want to be left alone."

"A magazine is a moment for myself. I focus on beautiful and positive things. It gives me energy."

Respondents from Delivering The Message Through Magazines, The Netherlands, 2013

Connecting with the personal self

Another phrase for expressing the relationship is 'connecting with the personal self', identified as one of the key roles of magazines in the *Magazine Experiences Europe* study published by *Time* and *Fortune* magazines in 2008 [10]. The survey was conducted among adults in France, UK and Germany. There were a variety of ways in which the connection with the personal self was demonstrated:

» 68% of consumers said they are alone when reading a magazine (compared to only 24% for watching TV which is a more social/family experience).

PANEL 1

COSMOPOLITAN MALAYSIA

Cosmopolitan Malaysia commissioned a qualitative study among young Muslim women in Malaysia who were readers of the magazine [9].

The study, published in December 2011, established that large shifts were occurring in these young women's lives and social circles. While they wish to stay true to their Muslim roots and respect their parents and their husbands, they also want independence, particularly financially and in their developing careers.

They are optimistic and aspiring. *Cosmopolitan* is a valued companion in this situation, providing them with role models and inspiration, helping them feel fashionable and beautiful and thus bolstering their self-confidence.

Their deep relationship with *Cosmopolitan* enables the magazine to guide their projections of themselves into the woman they wish to become – stylish and trendy, hard-working but fun, modern and independent. "*Cosmopolitan* has become their partner-in-life" summarises the report.

- 52% agreed with the statement 'My choice of magazines says something about the kind of person I am'.
- 57% said 'There are always magazines in my house'.
- 34% of consumers set aside a 'special time' for reading magazines. It is a 'me time' medium.
- 22% described their magazine reading experience as being 'Like a gift to myself'.

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

A companion study from Time Inc, this time in the USA, called *The Magazine Experience Study* [11], similarly concluded that magazines meet a range of emotional and rational needs. There is the pleasurable anticipation of a magazine's availability, whether through the post or from a bookstall. There's "the joy of discovery" of what a new issue contains, and the rewards of picking up the issue a number of times.

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

Engagement / involvement

A range of emotional and behavioural consequences flow outwards from the central fact that readers strike up personal relationships with their favourite magazines (Figure 4) – and these consequences in return form some of the proof of that engagement and involvement.

Trust is established. Readers make time to read an issue. It is a relaxed time, often alone, 'me time'. The readers savour the 'magazine moment'. There is focused attention, and little multi-tasking. Issues are read thoroughly, as considerable time is spent reading. Timeless content is often kept for reference. Copies are picked up on more than one occasion, and this repeat reading means that pages – editorial and advertising – are exposed more than once. Since the reader is in physical control, everything that strikes a chord can be dwelt on for as long as desired.

> "I come out of reading *Cosmopolitan* feeling a different person than when I come out of reading *Prima*."
>
> Focus group respondent

A study in Chile, published in 2013, investigated engagement in printed editions of magazines. *Engaging Readers: magazine advertising effectiveness in the Chilean media market* [12] was designed at the University of the Andes in Santiago, in collaboration with the Asociación Nacional de la Prensa Chile.

The findings were in full accord with those in other countries. For example, readers are very loyal to the magazines they choose. They dedicate a special time to read them. They make comments such as "It's a me-time, a time to relax", "It's an infinite pleasure", and "It is very easy to be transported by the stories and pictures in a magazine". These experiences represent deep engagement in the medium.

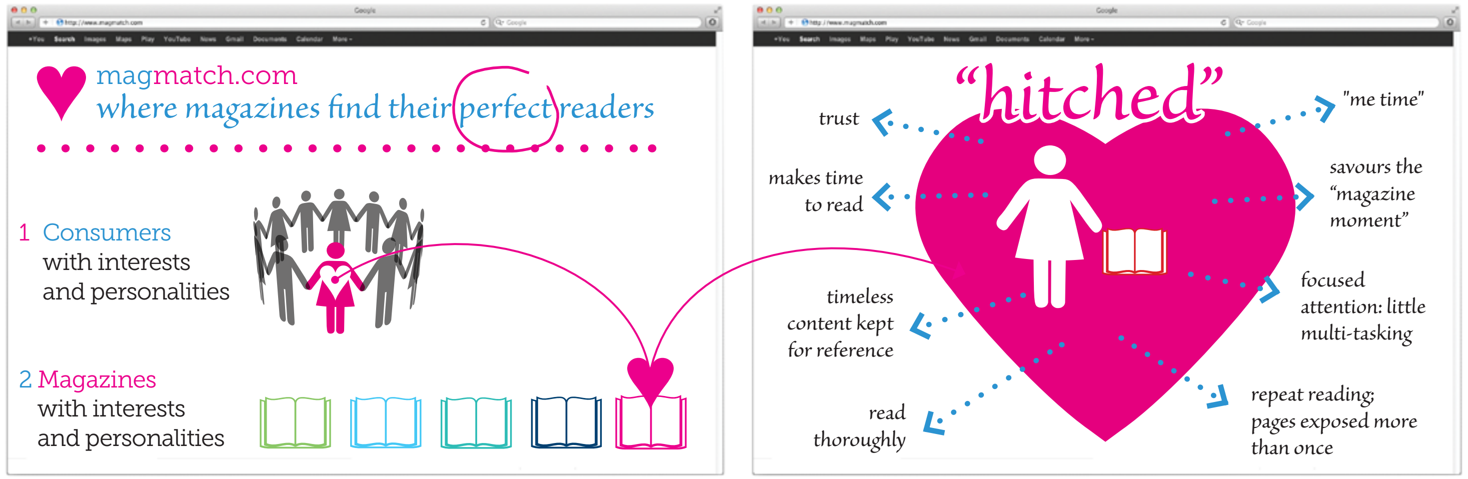
For advertisers, this engagement is very significant because, as many studies have demonstrated, high involvement in a magazine rubs off onto the advertisements it carries, it enhances the communication of the messages in the ads, and is more likely to prompt action. This is examined in more detail in the next chapter.

The *AIM Engagement Survey*, published in India in 2011 by the Association of Indian Magazines (AIM) at the FIPP World Magazine Congress [13], summed up this process very well. The survey results

Scan page to watch AIM, India Video

FIG 4. **MATCHMAKERS**

How magazines and readers discover a certain chemistry



were presented in a video, which can be accessed by using the Viewa app to scan this page.

In brief, the survey confirmed that "Magazines aren't read with friends, at bars, or at the dinner table; magazines are read alone. They command undivided attention. We read when we're calm and relaxed, not while rushing to work or while juggling errands. 9 out of 10 readers do nothing else while reading magazines. Magazines are never background noise; we make time for them and commit to them.

Magazines are read with a purpose. Magazines grow on us: 68% of readers say they form intimate connections with their magazines, because magazines don't just inform, they engage."

There are many indicators of readers' engagement with their magazines. The next few sections discuss a number of them.

The 'magazine moment'

The *Absorbing Media* study published by the PPA (Professional Publishers Association) in the UK [14] described the typical magazine reading experience as 'the magazine moment'. The report stated: "The magazine moment was described warmly and positively by all respondents. It was treasured, as a break from work/housework/homework – an activity which transported readers from their everyday situation... sometimes into other people's lives or into a dream life of their own. 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. The satisfaction obtained was analogous to eating a favourite food."

Although *Absorbing Media* was published a dozen years ago in 2002 it stands in a long sequence of studies producing findings about printed magazines that have been consistent right to the present day.

One of the more recent in this sequence of studies is *The Magazine Experience* survey in Belgium, published in 2012 by IP Plurimedia [6]. It used the phrase 'the magazine bubble': reading a magazine in quality me-time, relaxed, usually at home (79% of reading occasions) and usually alone (66% of reading occasions).

Trust and 'me time'

The involvement between readers and their chosen magazines creates trust in the magazine's contents. The *AdSense* study by IPC Media in the UK in 2012 [15] concluded "Trust in magazines is grounded in providing personally targeted, impartial information which is accurately researched. Magazines are an 'appointment to view' medium which offers valuable 'me time'."

Copies tend to be read as a treat, when relaxing, and for taking a break. Readers are in a receptive mood – receptive to all the contents of the magazine, including the advertising.

These points were echoed by – among many others – the Indonesian survey *Usage of Multiple Platforms Of A Magazine Brand* by the Femina Group in 2013 [5]. Figure 5 shows the very strong endorsement by Femina readers of the high trust placed in the magazine, the importance of the practical information it contains, and the relaxation associated with the title.

> I feel that because I am purchasing the magazine that fits in most with my lifestyle, the adverts and articles are more personally directed at me..."
>
> Respondent in AdSense survey, IPC Media, UK, 2012

Time spent reading

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

In the Czech Republic, for example, consumers spent an average of 4 hours 42 minutes per week reading all their magazines, according to the *Magazine Advertising Study* by the Czech Publishers Association/Millward Brown [16]. This rose to 6 hours 10 minutes when the magazines' online versions were added.

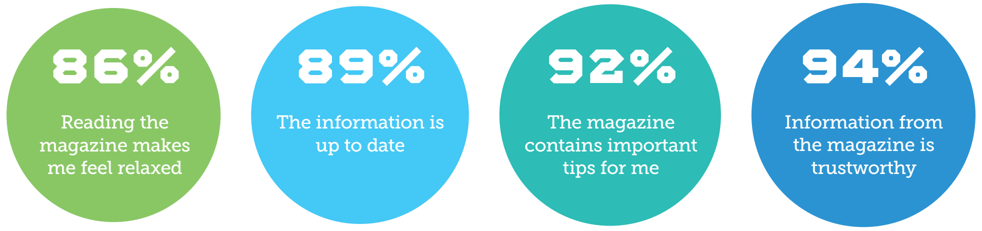
The UK's *National Readership Survey* [17] is one of many surveys which measure time spent reading for every individual publication it covers. As Figure 6 shows, in 2014 the average magazine is read for 50 minutes, with the monthlies and bi-monthlies averaging rather more than that and the weeklies rather less.

Has the time spent reading magazines been reduced by the growing use of digital media over the last eight years? In Canada the firm answer is No. The *Print Measurement Bureau (PMB)* readership survey [17] shows in Figure 7 that reading time for the average magazine has not fallen at all during the period 2005 to 2013, remaining steadily at an average of 40-42 minutes throughout the eight-year period.

The PMB also measures 'average degree of interest', on a 10 point scale, across all measured titles. This too has remained very constant during the nine years (Figure 8).

FIG 5. **READER ATTITUDES TO *FEMINA* MAGAZINE**

% of readers agreeing or agreeing strongly with statement



Base: female readers of Femina magazine
Source: Usage of Multiple Platforms Of A Magazine Brand, Femina Group, Indonesia, 2013

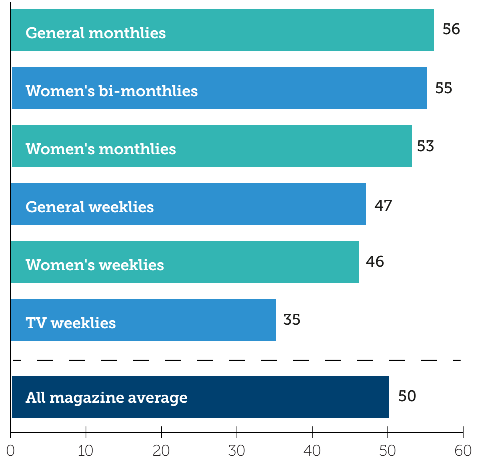
Tracking how issues are read

One of the strengths of printed publications is that they can be picked up and read on multiple occasions. This can be measured very precisely by a passive measurement system known as RFID (Radio Frequency ID) in which a copy of a magazine is placed in a special reading/scanning device which records every time a page of the magazine is opened, and the exact time at which each page is turned.

In Germany the *Ad Impact Monitor (AIM)* research programme running from 2009 through into 2014 [18] included an RFID study. The AIM programme, initiated by VDZ the national magazine association, and latterly run by a new organisation including advertisers and media agencies, involves three elements: ad tracking, brand tracking, and the RFID study. The *RFID*

FIG 6.
AVERAGE TIME SPENT READING

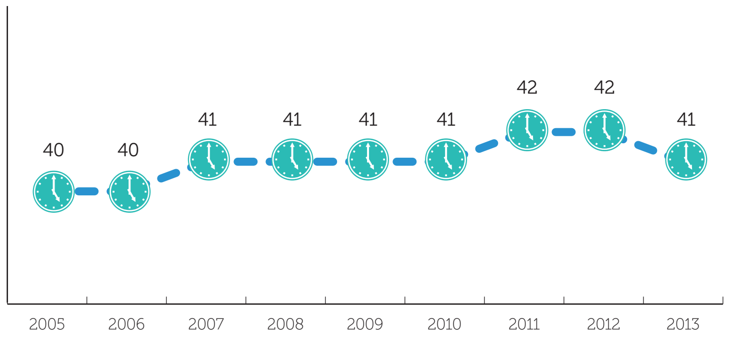
Minutes per average issue



Based on paid-for magazines (adults), except women's titles (based on women).
Source: National Readership Survey, UK, Apr 2013-Mar 2014

FIG 7. **TIME SPENT READING REMAINS STABLE**

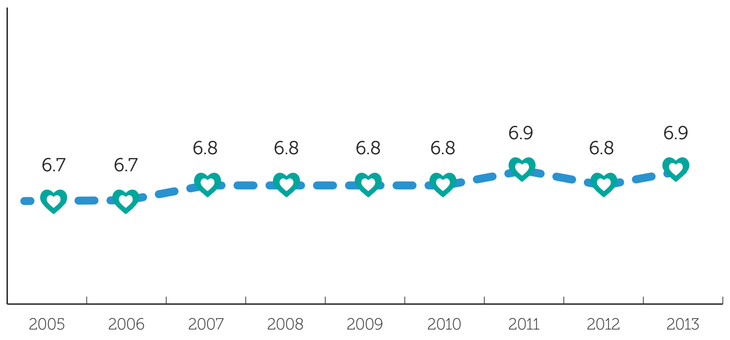
Average minutes per issue



Source: Print Measurement Bureau, Canada. Period: Fall, except 2013 (Spring).

FIG 8. **READER INTEREST SCORE REMAINS STABLE**

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



Source: Print Measurement Bureau, Canada. Period: Fall, except 2013 (Spring).

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

For example, a 38 year old woman read the June 2009 issue of *Vogue*. She read it on six occasions, in the course of which she read 210 of the 212 pages of that issue. Only two pages were not opened at all. Nearly all pages were opened on at least two occasions, and some pages exceeded that.

Figure 9 shows that on 13 May the woman looked at the first few pages and sampled a few others. On 18 May she had a thorough look through the first half of the magazine. During 21 May in the evening she had an intense read, opening almost every page and opening a few of the pages twice or even three times.

On 1 and 18 June she only looked at the front cover, but on 5 June she enjoyed a thorough read of the second half of the magazine, seeing some of the pages more than once. She also looked at a handful of pages in the front half of the title.

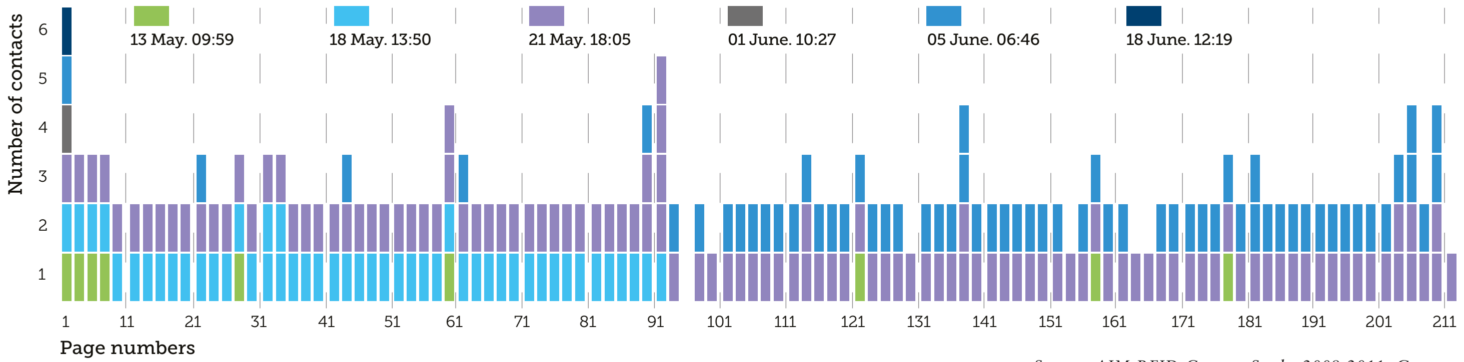
This illustrates in a striking way how every page, including every advertisement, can deliver several exposures to the same reader.

In Russia the publisher Hearst-Shkulev Media, inspired by the German study, commissioned its own RFID research. *How A Weekly TV Magazine Is Read: An RFID Study in Russia*, presented in 2013 [19], examined the TV guide *Antenna-Telesem*.

Figure 10 plots the way reading occasions are spread through the day. On weekdays there is a

FIG 9. **READING PATTERN FOR GERMAN *VOGUE***

June 2009 issue – 38 year old woman



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

Russian TV guide *Antenna-Telesem* in the RFID reader

marked summit in reading during the evening, when viewing of television is at its peak and the listings pages are in greatest use. Even so, a significant proportion of reading takes place during the mornings and afternoons. At weekends the pattern is rather different, with a higher proportion of reading (compared with weekdays) taking place before the evening.

This pattern is that of a TV weekly, and for other magazines used in different ways the pattern might be different. 94% of *Antenna-Telesem* readers begin reading from the front of the issue, starting in the first ten pages.

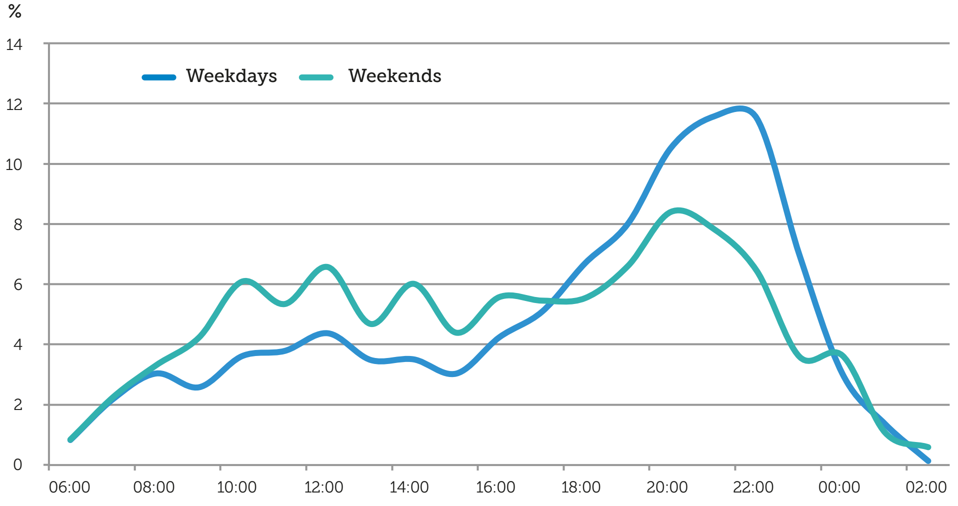
Multiple pick-ups and repeat reading

The Russian analysis showed that adult readers of *Antenna-Telesem* TV guide pick up an issue of the magazine 7.0 times on average, and clock up a total reading time of 57 minutes. The average spread is opened 2.0 times. This being a TV weekly, with the more functional programme listings in the middle and later parts of the magazine, the average number of times a spread is opened is greater towards the front of the publication where the main articles are:

- 1st third of issue: 2.3 times per spread
- 2nd third of issue: 1.8
- 3rd third of issue: 1.6

FIG 10. **READING OF ANTENNA-TELESEM TV WEEKLY THROUGH THE DAY**

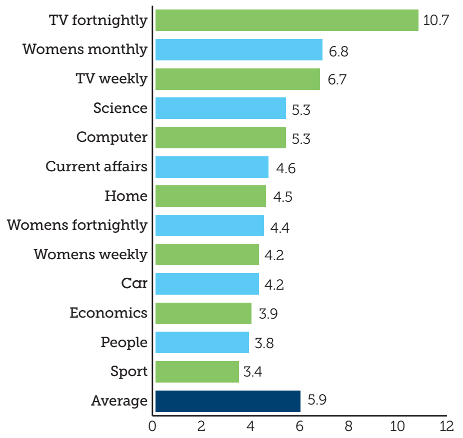
Proportion of the day's reading occasions, per hour



Source: How A Weekly TV Magazine Is Read: An RFID Study in Russia, Hearst-Shkulev Media, Russia, 2013

FIG 11. **AVERAGE OF SIX READING OCCASIONS FOR EACH ISSUE**

Average number of reading occasions per reader, by category of magazine



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

The German RFID study found that on average each issue was picked up 5.9 times. The number varied by category of magazine, as Figure 11 shows. For example, TV fortnightlies with their daily reference function are picked up 10.7 times on average.

It is notable that the figure for German TV weeklies was very similar, at 6.7 pick-ups, to the 7.0 found for *Antenna-Telesem* in Russia, another little example of the observation that consumers use magazines in very much the same way all over the world. In the German study the average two-page spread was looked at 1.88 times. If the spread included an advertisement it made little difference: the spread was still looked at 1.80 times.

Some estimates have put the average page contact figure rather higher than Germany's 1.8. In the UK, using a different measurement technique, the average Page EXposure score (PEX) was calculated as 2.5, according to the *Quality of Reading Survey (QRS)* [20]. There were variations by individual magazine and by genre of magazine.

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

In the Czech Republic a similar situation to Germany and the UK was found. The *Magazine Advertising Study* conducted by Millward Brown for the Czech Publishers Association [16] found that 85% of magazine readers pick up and read a copy more than once, and 63% several times.

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

PANEL 2

EASY FOOD MAGAZINE

Easy Food magazine in **Ireland**, published by Zahra, is written for 'budget-conscious nutritionally-aware home cooks who want quick and easy recipes'.

Its quantitative reader survey [21] showed that the magazine created inspiration and confidence and solved the problem of what to provide for the family day after day while ensuring it is nutritionally balanced:

- 99% of readers agreed "*Easy Food* provides inspiring meal ideas for my family and myself"
- 94% agreed "Following a recipe's instructions gives me confidence"
- 62% agreed "I find it difficult to come up with ideas of what to cook for myself/my family every day"
- 89% agreed "I'm concerned about eating a nutritionally balanced diet"

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

Keeping copies for reference

Those magazines containing substantial timeless contents are liable to kept by readers for a long time. Taking the Irish cookery magazine *Easy Food* as an example (Panel 2), a reader survey [21] showed that 49% of readers keep the issues after reading them, in order to refer back to them later.

Similarly the *Magazine Engagement Study* in The Netherlands, published by the NUV Dutch Publishers Association in collaboration with Starcom Netherlands [22], found that 56% of readers of specialist magazines save issues for future reference.

Readership accumulation

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

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

The rate of accumulation has been measured in many countries. The RFID technique described earlier yields a particularly precise description.

In Russia the day by day pattern of readership accumulation for TV weekly *Antenna-Telesem* was measured by the survey *How A Weekly TV Magazine Is Read: An RFID Study in Russia* [19]. For a typical issue, 32% of the eventual readership first looks at the magazine during the on-sale day, Wednesday (Figure 12). By day 3, a Friday, 68% of readers have had their first look at the issue. Thereafter new readers continue to accumulate but at a reducing rate, until all the readers of the issue have seen it at least once by day 11, by which time the next issue is on its fourth day. The shape of the build-up is a smooth convex curve.

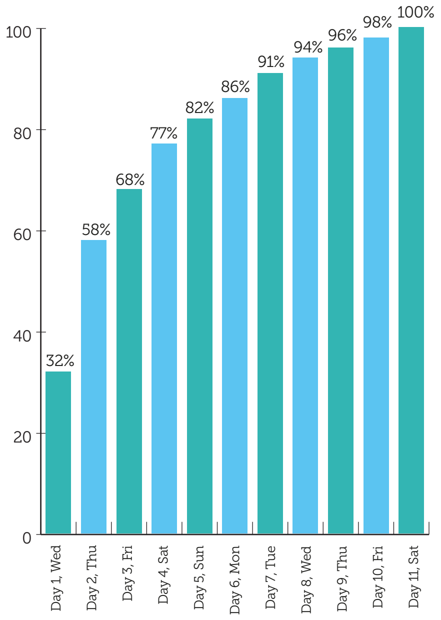
What the curve doesn't measure is the second and subsequent pick-ups of the issue, which of course are delivering further exposures to the advertisements. While an issue is gathering new first-time readers during days 2 to 11, many people who have already seen it are re-reading it.

In Germany the RFID study within the *Ad Impact Monitor (AIM)* programme, discussed earlier [18], also produced accumulation curves, for all the categories of magazines measured. Three sample curves are shown in Figure 13: for weeklies, fortnightlies and monthlies.

Another example is the UK, where the *National Readership Survey (NRS)* commissioned its own *Readership Accumulation Survey* [23], using a very different technique from RFID. Every magazine and

FIG 12. **READERSHIP ACCUMULATION: ANTENNA-TELESEM TV WEEKLY**

Build-up of first contact with the issue



Source: How A Weekly TV Magazine Is Read: An RFID Study in Russia, Hearst-Shkulev Media, Russia, 2013

newspaper whose readership was measured in the NRS was given its own accumulation curve – that is, about 230 curves were published. In addition, summary curves for 25 publication groups were created. Figure 14 shows some examples.

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

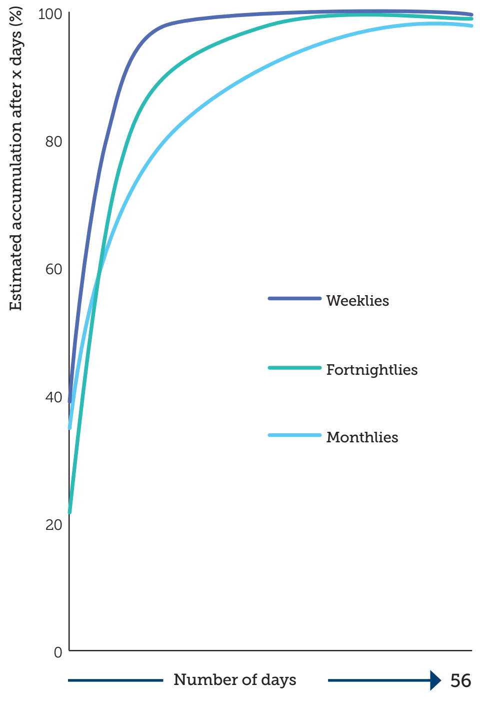
Moreover, there is a very strong similarity between the UK, German and Russian curves, and those from several other countries which have measured magazines' rate of accumulation of readership. Even two countries which have different balances of circulation methods have look-alike accumulation curves – for instance the UK whose circulations are predominantly through single copy sales and the USA where the magazine market is predominantly based on subscriptions.

We can be confident that a broadly comparable pattern exists in almost all other countries, and therefore it would be reasonable for any country without its own accumulation study to adopt a set of curves based on one or more of those countries which do have such a study. Approximate as it may be, it is better to do that than to work on the implicit assumption that all reading of an issue occurs on the day the issue first goes on sale.

[2] CONSUMERS' USE OF MAGAZINES IN PRINT

FIG 13. **READERSHIP ACCUMULATION**

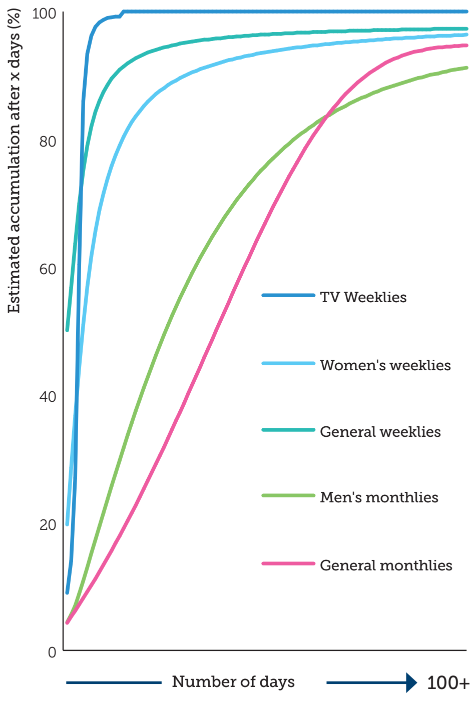
Germany



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

FIG 14. **READERSHIP ACCUMULATION**

UK



Source: NRS Readership Accumulation Survey, UK, 2004

The concept of accumulation is vital when planning the allocation of ads across a campaign, in order to control the week by week delivery of ad exposures. It is also essential when modelling the post-campaign effectiveness of magazine advertising. To evaluate a magazine campaign on the (sometimes unwitting) assumption that all the exposures generated by an issue can be allocated to the week the issue is published is to significantly undervalue the campaign.

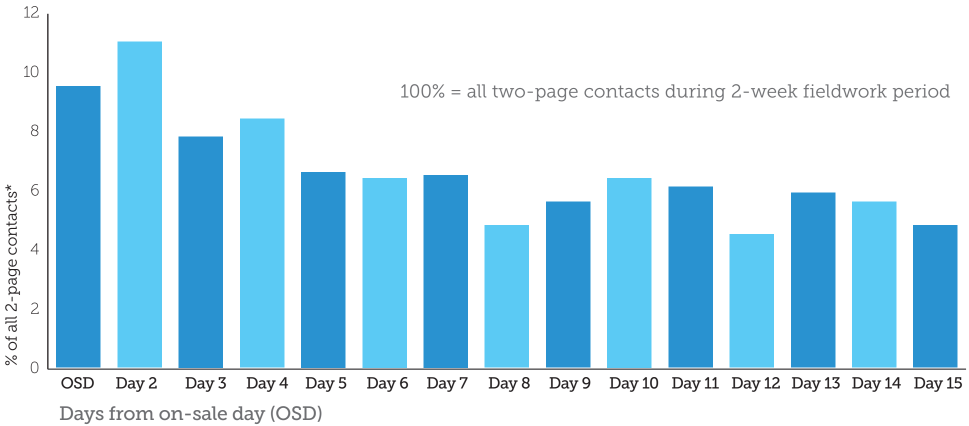
Instead, it is necessary for the model to distribute the exposures through time in line with the pattern described by readership accumulation studies, in order to correctly align (say) weekly exposures with the weekly pattern of sales or other criterion.

The readership accumulation curves are based on readers' first exposure to an issue. The curves thereby ignore all a reader's subsequent repeat exposures to the same issue. An analysis of data from the *AIM RFID Contact Study* in Germany [18], based on 24 weekly magazines, took all the multiple exposures into account, and showed how exposure to double-page spreads builds up during the first two weeks. Figure 15 reveals the pattern for an average issue of a typical weekly magazine.

Among all contacts with double page spreads and the ads on them (including the repeat contacts), about 20% occur in the first two days,

FIG 15. **CONTINUOUS BUILD-UP OF EXPOSURES THROUGH TIME**

Taking account of multiple reading occasions: weekly magazines



Base: 290,299 two-page contacts; aggregated average of 24 weekly magazines
*Source: AIM RFID Contact Study, 2009-2011, Germany. *including second & subsequent reading occasions*

while 80% of exposures occur in the next 13 days. Even Days 13 and 14 are each contributing about 6% of the exposures generated in the two weeks. In addition, further exposures not measured by the RFID study will occur from Day 16 onwards, forming a long tail, and perhaps adding a tenth or fifth to the total contacts.

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

» Second and subsequent exposures to a typical double-page spread contribute heavily to the total impact of a magazine advertising campaign, and should be taken into account when planning campaigns and modelling post-campaign performances.

» The continuous build-up of exposures through time means that a magazine advertising campaign continues to work for a substantial period after the issues come on sale. ❤

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THE IMPACT OF ADS IN PRINT

- Ads in printed magazines are a valued part of their contents, because readers have chosen their magazines, and so have the advertisers.
- Relevance for readers means accurate targeting for advertisers.
- Highly engaged readers increase the effectiveness of the advertising.
- Readers notice relevant ads and take action
- Magazines move readers further along the journey towards purchase.

IN AN OFTEN-QUOTED piece of research, the media agency Starcom in the USA [24] asked consumers to tear out from their favourite magazines ten pages which between them represented the essence of the magazines. On average three of the ten pages were advertisements. This is a striking illustration that readers appreciate the advertisements in magazines as being a useful part of the package.

This chapter examines the impact of print magazine advertisements. Later chapters look at advertisements on magazine digital platforms, and magazine media advertising in the context of complete campaigns.

Relevance for readers means targeting for advertisers

Targeting is a basic strength of the magazine medium, and it provides advertisers with an audience tailor-made for information about suitable products. We have seen that readers' process of selection of their magazines ensures the *relevance* of the magazine's contents to each reader, and from an advertiser's point of view, relevance of content means a *targeted* audience.

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

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

Moreover in many markets magazines tend to target the most valuable customers – those who spend most. Within any market, some consumers are more enthusiastic and passionate about the subject than other customers in the same market. It is these enthusiasts who are most likely to be reading magazines about the topic, and spending money in the market. Consequently magazine readers tend to be more knowledgeable and to spend more. Their product knowledge, combined with their enthusiasm for the topic which makes them eager to talk to other people, makes them influential in other people's purchasing decisions too.

The targeted audiences of magazines, and its implications, were summed up by the study *They love our media brand, but do they love your ad?* from Sanoma Media, Belgium, in 2013 [25]:

"Consumers fall in love with the brand, not with the medium... The titles which perform best have clear personalities, specialise in a certain themes/topics or trigger interests from specific audiences. The strategy to attract engaged consumers with a mind receptive to commercial messages is targeting not so much predefined socio-demographic categories, but communities of interest. Media that focus on consumers' specific needs can deliver content in which products and brands can find their natural habitat. Advertising for them is not perceived as disruptive.

"The key to the very positive attitude towards advertising in (for example) women's magazines and their respective websites is clear: relevance, inspiration and context.

"Magazine brands are at the crossing where media engagement and advertising engagement meet. Not only does the media brand engage strongly, but the advertising is considered as non-disruptive."

Ads are part of the desired magazine content

The Belgian statement that "the advertising is considered as non-disruptive" is another way of saying that magazines are unique in the extent to which the advertisements are welcomed by the audience. It's a virtuous circle. Readers choose magazines which match their own interests and outlook. Only those advertisers whose products fit in with a magazine's editorial content and audience choose to advertise there. Therefore the carefully selected ads are likely to be of interest to the readers. It's a perfect dating arrangement.

The importance of engagement in a medium came through in a recent study in Chile. *Engaging Readers: magazine advertising effectiveness in the Chilean media market* was designed at the University of the Andes in Santiago in collaboration with the Asociación Nacional de la Prensa Chile, and was published in 2013 [12]. It concluded that "magazines are able to generate a series of experiences for the readers that have a positive impact on advertising effectiveness. Talking about and sharing the contents of a magazine, the feeling of belonging to a community, being inspired, and enjoying a timeout are important experiences positively related to how effective is the advertising in a magazine."

The Chilean study stands in a long line of surveys from around the globe and from previous years which make similar points, and which are still highly relevant today.

An example is the Australian research *Media Matchmaker: It's All About Relationships*, published by Magazine Publishers of Australia [26]. It showed that magazine advertising is perceived to be relevant, appealing and useful in deciding what to buy. It is the one medium for which ad avoidance is not a problem. The quantitative study captured this by showing a list of statements and asking respondents to say for each statement which of six media, if any, they thought the statement applied to. Magazines scored highest on the following statements while the other five media achieved much lower figures:

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

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

- "I avoid the ads if I can": 67% of free TV viewers agreed, but only 19% of magazine readers, the lowest score of any of the six media.
- "The ads annoy me": 76% of free TV viewers agreed, but only 14% of magazine readers – again the lowest score, this time equal with newspapers.

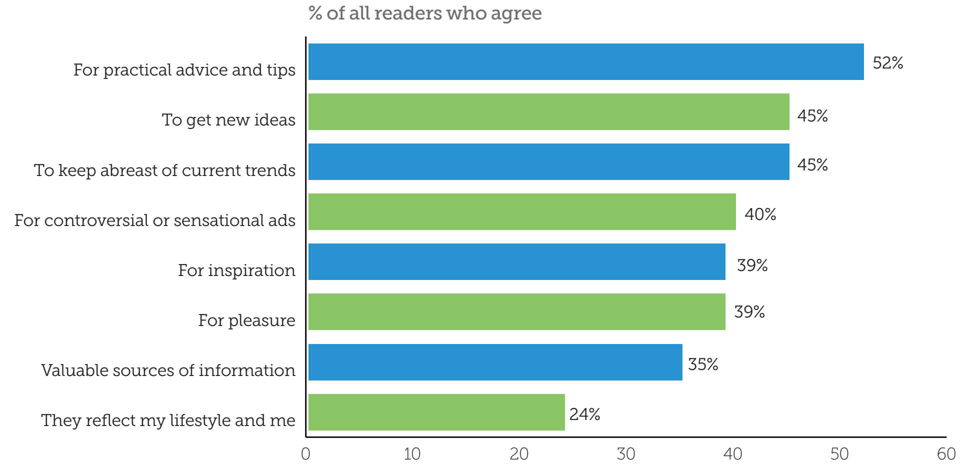
VOGUE SEPTEMBER 2014: A RECORD ISSUE

"Our biggest fashion issue ever shows how much print is still valued by advertisers and readers alike. I'm excited that we will soon be able to offer readers yet another platform on which to read their favourite fashion title, by launching digital editions for mobile in the Autumn."

Stephen Quinn, Vogue's Publishing Director. The September 2014 issue of British Vogue had a pagination of 462 with a record 293 ad pages.

[3] IMPACT OF ADVERTISEMENTS IN PRINT

FIG 16. **I READ ADVERTISEMENTS FOR/BECAUSE:**



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

Engagement increases ad effectiveness

"Engagement serves as a crucial process for making the message of the advertisement personally relevant, because consumers link the messages to their own associations and thoughts."

"A magazine's power rests in the fact that the reader takes the time to read, while focusing on the magazine. It is not only 'your moment', but also the moment for the advertiser. The magazine has the reader's total attention. The chances that readers will notice and read an advertisement are greater. This is an opportunity for an advertiser to have an exclusive encounter with consumers."

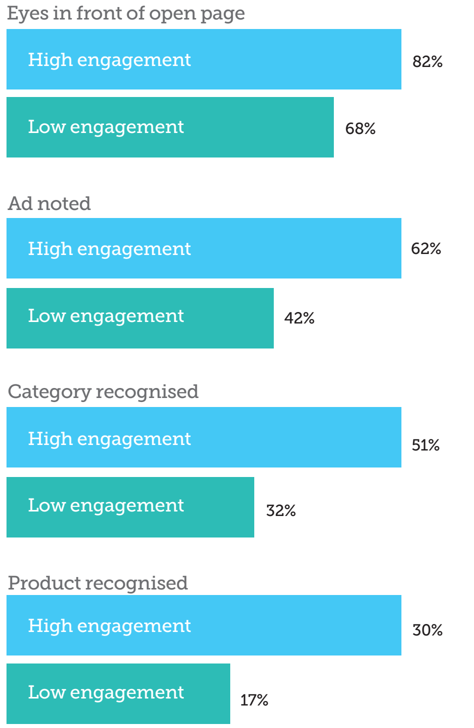
These words come from *The Magazine Engagement Study*, published by NUV Dutch Publishers Association in The Netherlands [22], which investigated readers' reasons for reading advertisements. Prominent themes were practical advice, information, and new ideas; and pleasure and inspiration (Figure 16).

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

Another insight into the significance of the high degree of engagement among magazine readers comes from ad testing statistics held in a large database by publisher Sanoma, who maintained a central collection of multi-country research in Belgium [27]. Readers classified as having high engagement with a magazine consistently scored higher than those classified as having low engagement, across a range of measures of ad receptivity (Figure 17).

> "The real value is in building on the trusted relationship between the reader and the magazine itself."
>
> Jim Jarrett, Mindshare UK, 2012

FIG 17. **ENGAGED READERS SEE MORE**



Source: Sanoma Ad Test Database, 2000-2010

Ad noting: what it is measuring

Ad 'noting' – recall – is a useful indicator of the impact of an advertisement. However one should be clear what it is measuring.

Involvement with advertising is a largely subconscious process in which consumers relate advertising messages to their own interests, thoughts and associations. If such matches are made with a particular ad, the ad acquires personal relevance, which reinforces its persuasive power.

The effect is considerably stronger when the reader feels emotionally involved with the magazine carrying the ad. A reader's perception of and remembrance of an ad is filtered through these connections and associations.

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

The level of the scores is dependent on the form of the question asked. A question which asks whether or not the reader 'looked at' the advertisement is likely to produce lower scores than a question which distinguishes between (a) just glancing at it and moving on to something else, and (b) actually reading something in the ad. This is because most respondents can't believe interviewers count casual screening-out of advertisements as 'looking at' the ads (even supposing they remember doing so), so they don't claim such glancing unless specifically asked about it. It can make a big difference to the scores.

Chapter 1 described how, in the *AIM RFID Contact Study* commissioned in Germany by the Verband Deutscher Zeitschriftenverleger (VDZ) [18], the example reader of *Vogue* had opened 210 of the 212 pages in the issue – giving an average page exposure score of 99%. Yet it is extremely unlikely that this reader would subsequently claim, in a typical ad noting interview, to have seen every advertisement in the book except those (if any) on the two missed pages.

The *RFID Contact Study* updates and endorses the findings of a number of much older studies. These demonstrated that if a survey distinguishes between "saw and read something" on the page and "saw but just glanced at" the page, scores will leap to around 90%. Another body of studies recording eye contact through filming eye movements has shown that around 90% of magazine ads are glanced at, but not all eye contact leads to mental processing which is sufficient for the reader to recall seeing a given ad if interviewed later.

Page traffic and ad noting data are clearly not measuring total exposure but communication of some sort. The scores are reflecting interest and involvement in the subject matter of the article or advertisement. Selective perception and memory are at work.

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

Ad noting: some results

There are numerous services offering print advertisement noting and impact measurements, and although there are some variations in methodology, and these services operate in a range of countries, most now use online interviewing and yield broadly similar results. Based on large samples of four-colour ads, typical average values, or norms, by size of advertisement are shown in Figure 18.

FIG 18. TYPICAL AD NOTING / IMPACT SCORES

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

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

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

Further insights have been provided by the *Magnify* study in the UK, commissioned by the PPA (Professional Publishers Association) and published in 2011 [28]. It was an advertisement impact survey conducted by GfK, using their StarchMetrix methodology.

Magnify compared the impact of editorial articles as well as advertisements. It found that the average noting scores were the same for both (Figure 19). For ads to be recalled as much as the articles indicates that magazines are a very hospitable environment for advertising.

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

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

Magnify's overall conclusion was that the readers' attention to the advertising, and the presentation of the advertising in the hospitable environment of a magazine, leads to engagement with the ad, which in turn helps drive familiarity with the product, information-gathering about it, purchase consideration, and buying. Thus magazines have a major contribution to make in nudging consumers along their journey towards purchase – whether it is a magazines-only campaign or magazine media are used as part of a multimedia campaign. PPA has created a short video which summarises *Magnify's* results.

Scan page to watch Magnify, UK Video

FIG 19. DRIVING BEHAVIOUR ON CONSUMER JOURNEY

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

Source: Magnify, PPA, 2011, UK

GfK's StarchMetrix methodology has been employed in a number of countries. Average ad noting scores for a full page ad were found to be:

- 54% in the UK (in *Magnify*)
- 51% in the USA in 2013 [29]
- 51% in Canada, reported in *Consumer Magazine Factbook 2013* [30]
- 55% in Singapore in SPH Magazines' *Advertising ROI Report* of 2014 [31]

It illustrates how consumers in different countries use magazines, and respond to magazine ads, in much the same way.

Exposure to pages containing ads

In The Netherlands the Dutch national readership survey, *NOM*, conducted a page traffic survey to measure exposure to pages containing advertisements – to take their readership currency a stage further, from exposure to the magazine or newspaper issue to exposure to the ad pages. The project was described in *Opportunity To See Advertising (OTSA) in Newspapers & Magazines* in 2013 [32]. Respondents from the NOM readership survey were re-interviewed, and readers of current issues of magazines were asked about their exposure to a sample of pages containing ads in those issues.

The findings were that the average ad page in the average magazine was recalled by 57% of issue readers. For monthly magazines the figure was 61%, and for weeklies it was 55%. These statistics were a little higher than the conventional ad noting scores reported earlier – using a rather different method of questioning.

These page traffic scores report the percentage who recall seeing ad pages at least once but, like the ad noting scores, they do not show how many times the pages were seen. They do not measure repeat reading. Again like noting scores, they are a valuable measure of communication (since memory is involved in the measurement), not a measure of total ad page exposure, for which the scores will be under-estimates.

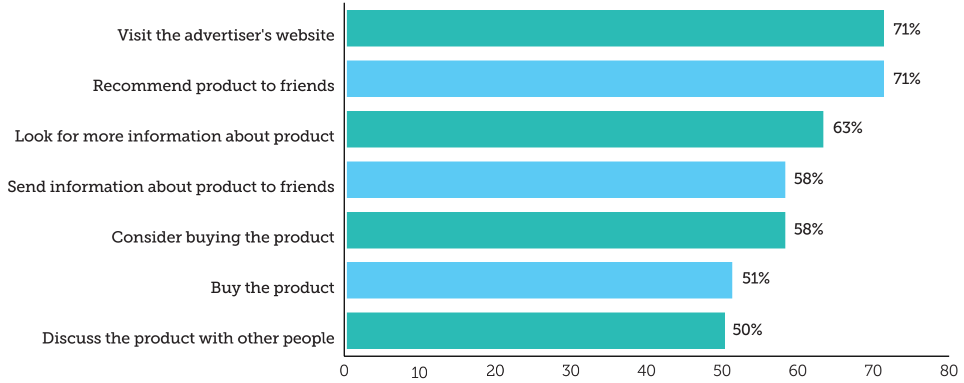
Beyond ad noting: actions stimulated by seeing print ads

Magazines are very effective at stimulating further action by readers. Consumers' selection of their magazines, coupled with advertisers' selection of relevant magazines in which to place their advertising, means that the two will meet.

[3] IMPACT OF ADVERTISEMENTS IN PRINT

FIG 20. **ACTION IN RESPONSE TO MAGAZINE ADVERTISING**

The advertisements make me want to...



Base: female readers of Femina magazine
Source: Usage of Multiple Platforms Of A Magazine Brand, Femina Group, Indonesia, 2013

Consumers find in their magazines ads that are relevant and interesting to them, and thus many readers are likely to take further action.

It is the targeting achieved by magazines, through readers' own selections, which makes the medium powerful in persuading its audience to take further steps. Targeting means reader, magazine and advertiser are attuned to one another. This section cites eight studies which look at aspects of this.

The PPA's *Magnify* is one of many pieces of research from around the world which, in measuring ad impact, have gone beyond ad noting and measured actions of some kind which were stimulated by seeing print ads (see Figure 19).

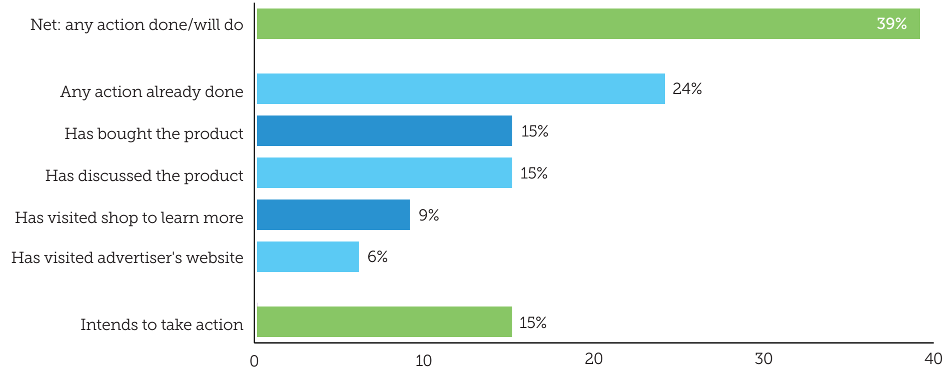
In Indonesia the 2013 research *Usage of Multiple Platforms Of A Magazine Brand* [5] among readers of Femina women's weekly magazine asked what action readers took in response to the advertising in Femina. Figure 20 shows that it was considerable. There were very high levels of seeking further information (visiting the advertiser's websites, and seeking information elsewhere), of spreading the message (recommending the product to friends, sending information to friends, and discussing the product), and moving towards purchase (considering it, and doing it).

Those results relate to the advertising in general, rather than individual ads. An earlier study in Indonesia by the Femina Group examined three individual advertisements, one each in three of the group's magazines. The survey, called *Ad Buzz For Brands Advertised In Magazines* and published in 2010 [5], interviewed readers of *Femina* (written for women aged 24-35), *Gadis* (for girls aged 13-17), and *Ayahbunda* (a mother-and-baby title). For each magazine one advertisement was researched among its readers.

As well as high levels of ad recall, it was found that 40% of *Femina* readers, 65% of *Gadis* readers and 25% of *Ayahbunda* readers had discussed the ad or product with other people. For *Femina* and *Ayahbunda* it averaged around 2-4 other people, while for *Gadis* it was 5-9 friends who were spoken with.

The high level of buzz generated by the ads was accompanied by many readers also visiting the advertisers' websites, visiting a store, looking for further information elsewhere, and keeping the ad for reference. In addition a number of respondents bought the products.

FIG 21. **SUBSCRIBERS' REACTIONS TO INDIVIDUAL ADS** (FINLAND)



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

Another example is an analysis in Finland conducted for Sanoma Magazines Finland, reported as *Measuring ROI for Magazine Advertisements* and based on the *Sanoma ABC Database*, 2009-2010 [33]. Female subscribers to Sanoma's women's magazines (subscribers form the majority of readers) were interviewed to establish their awareness of and reactions to the ads in the magazines.

The average ad noting score was 52% (which is within the narrow range shown by the StarchMetrix studies listed earlier). 90% of subscribers said they had taken action of some sort in response to an ad in their magazine. What was particularly impressive was the reaction to individual advertisements. On average, 39% of those who had noted a specific ad said they had taken or intended to take some form of action as a result of seeing that ad. Figure 21 gives more details, and shows that magazine ads drive readers to act.

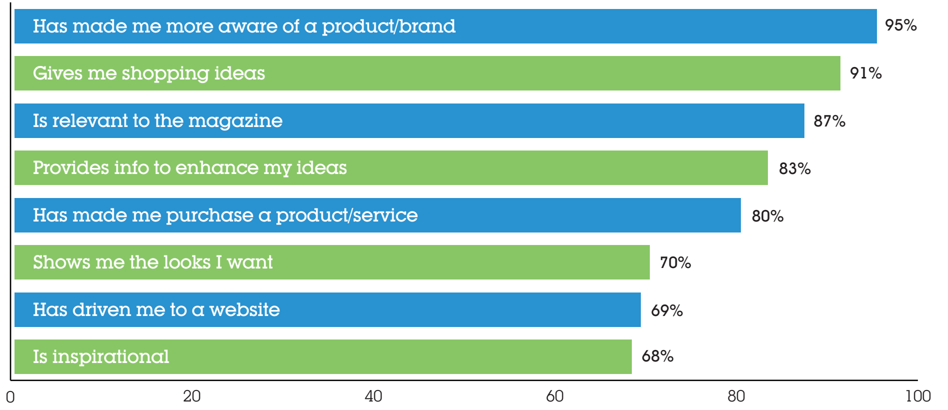
The power of magazine advertising within the beauty product category was illustrated by *Cleo* magazine in Singapore. *Cleo* is read primarily by young women from 18-29 years of age, and the magazine advises on beauty, fashion, health, sport, travel, finance and general lifestyle trends. The *Cleo Beauty Survey* [34] was undertaken with the objective of demonstrating to beauty advertisers and would-be advertisers the influence and power of *Cleo* in creating awareness, engagement, brand loyalty and, ultimately, driving retail through its strong relationship with young women who have high disposable incomes and a willingness to spend on themselves.

Nielsen, conducting the study, reported that almost 90% of *Cleo* readers, conscious about their image, were actively looking for ways to further enhance that image. When asked "Pick ONE medium that has given you the most relevant beauty information", 81% said magazines, and the next most popular medium was word of mouth recommendation, cited by 14%.

The positive attitudes to magazine advertising,

FIG 22. BEAUTY-RELATED ADVERTISING IN CLEO MAGAZINE

% who agree*: The advertising...



** Agree strongly +Agree. Base: readers of Cleo magazine. Source: Cleo Beauty Survey, 2009, Singapore*

and its ability to make readers aware of brands, absorb information about them, and be encouraged towards purchase, are demonstrated in Figure 22.

Figure 23 shows the power of magazines in prompting trial of a new beauty brand.

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

A survey in Ireland reinforced the point that readers are likely to take action after seeing advertisements in their magazines. In the reader survey by *Easy Food* magazine [21] 73% of readers agreed that "I have bought a particular brand suggested in an *Easy Food* recipe or 'EF Recommends' box", and 91% agreed that "The advertising in *Easy Food* gives me useful product information".

Similarly glossy women's monthly magazine *Image*, from Ireland's Image Publications, found in its reader survey [35] that:

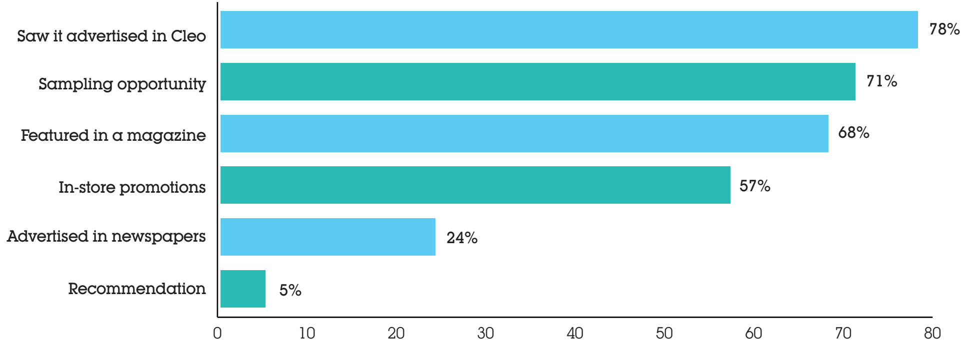
» 82% of readers had bought a product that advertised in Image
» 81% had tried new health and beauty services which have been featured in the magazine
» 88% considered that the advertising in Image was useful

Another example is Time Inc's *Magazine Experience Study* in the USA [11]. It found that three-quarters of readers acted on the content of the advertising when they had finished reading a favourite magazine:

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

FIG 23. TRIGGERS TO TRY A NEW BRAND OF BEAUTY PRODUCT

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



Base: readers of Cleo. Source: Cleo Beauty Survey, 2009, Singapore

Some 82% of Image magazine's readers had bought a product that advertised in its pages

» 33% had visited a website mentioned in a magazine ad.

The *AdSense* study published by IPC Media in the UK in 2012 [15] found substantial agreement with these two statements, among readers:

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

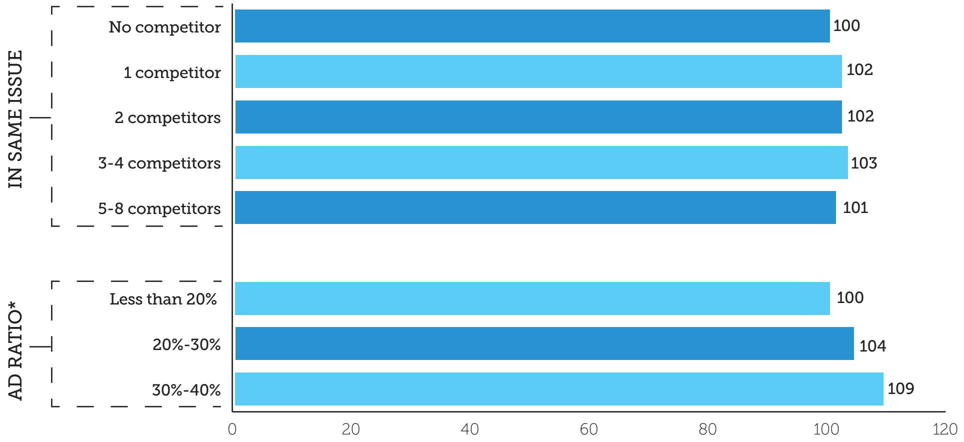
All these examples – and there are many more – show that printed magazines can stimulate high levels of action as a result of seeing advertisements in them.

Ad clutter is not a problem in magazines

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

There is no such problem of clutter in magazines however. The targeted nature of a magazine's readers means that most magazine ads have some degree of relevance to the issue's audience. Indeed the advertisements are generally regarded as an integral and important part of the content. Moreover the reader controls

FIG 24. **AD NOTING: AD CLUTTER IS NOT A PROBLEM**



Ad noting norms in index form. Source: Stop/watch, Medialogue 2005, Belgium
**Data for 30%-40% based on women's fashion/lifestyle monthlies only*

the order in which ads are looked at, and the attention and time devoted to each one – unlike the broadcast media where it is the broadcaster who controls which commercials are presented, when, and for how long.

In magazines the relevance of the ads, and the readers' generally positive attitudes, mean that a given advertisement's impact is not likely to be much affected by whether there are other ads nearby, ads from direct competitors, or whether a high proportion of pages are made up of ads.

This was confirmed by the *Stop/watch* report [36] published by Medialogue in Belgium. *Stop/watch* is a compilation of several years' worth of data on ad noting and other measures of ad performance. The report provides the most detailed analysis of noting scores that have been published. Although it is nine years since *Stop/watch* appeared it is still relevant, and the absolute levels of noting scores correspond with those of recent surveys: for example, 55% noting for the average full-page ad – similar to the StarchMetrix figures cited earlier.

Figure 24 shows that there is no disadvantage (in terms of recalling the advertisement) to having direct competitors advertising in the same issue of a magazine – whether there are none or eight. This is a contrast to TV and radio, where it is a cardinal rule not to have direct competitors in the same ad break.

The magazines covered by this analysis were mass-market titles. With specialist magazines, readers positively want lots of competitors in the same issue. Car magazines are a good example: many are thick with advertisements.

Fashion magazines are another example of the 'specialist marketplace effect'. This explains the lower half of Figure 24, which shows that for such magazines 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. All the magazines with the highest ad ratios were fashion/lifestyle women's monthlies. For this category of magazine there are many issues where 30%-40% of the pagination is advertising, and the average score for an ad in such issues is 9% higher than the all-magazine average for an ad ratio of less than 20%.

Clearly, ad clutter is not a problem when it comes to magazines.

Another way of measuring ad clutter is to analyse noting scores by thickness of issues. An analysis by GfK MRI Starch in the USA in 2011 [37] examined average noting scores by size of issue, based on 2902 magazine issues and more than 78,000 ads. It found that there was no difference in noting scores between issues with less than 175 pages, 175-225 pages, 226-274, 275-325, 326-499 and 500+ pages. Thicker issues means more ads (or rather, more ads mean thicker issues), yet the greater volume of ads did not cause any fall in noting scores.

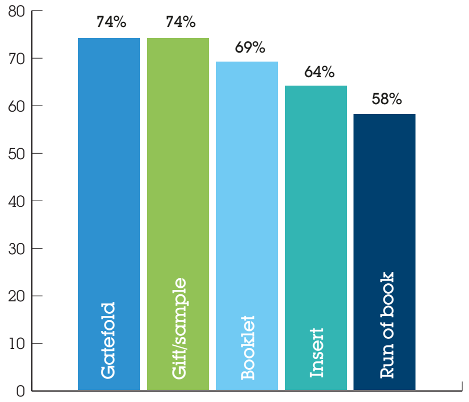
Creative formats for print advertising

Creative formats for print advertising can increase readers' responses. The scale of the increases was estimated by the *Advertising ROI Report* in Singapore, published in 2014 by SPH Magazines [31]. GfK's StarchMetrix service interviewed more than 3,500 readers of ten SPH magazines, asking them about 874 ads across 13 product categories. This included examples of ads with gatefolds, gifts, booklets and inserts.

These special formats generated higher recall of the advertising. Figure 25 shows that gatefolds, gifts/samples, booklets and inserts all achieved higher average noting scores than run-of-book ads.

FIG 25. **CREATIVE FORMATS INCREASE NOTICEABILITY**

% of respondents who recall seeing advertisement (ad noting)



Base: respondents who had read relevant issue of magazine
Source: The Advertising ROI Report, SPH Magazines/GfK, Singapore, 2014

Similarly, actions taken as a result of seeing a specific ad (taking at least one action out of a list of ten) were higher than run-of-book ads. As SPH reported: "The physicality of print allows for creative executions to shine. Creative ads engage readers and leave them with deeper impressions."

The results from Singapore in 2014 echo the general findings of many earlier studies in other countries, illustrating that the way consumers use printed magazines is much the same worldwide, and has not changed a great deal in the last two decades or more. For example, one of the largest compilations of ad noting data was the *Stop/watch* report from Medialogue in Belgium [36]. The Belgian and Singapore surveys found broadly similar results. For instance, indexing the average ad noting score of a standard one-page run-of-book ad as 100, the index for inserts was 112 in Belgium and 110 in Singapore. For booklets it was 120 in Belgium and 119 in Singapore. For gifts/samples it was 141 in Belgium and 128 in Singapore.

These statistics on the enhanced attention given to creative or unusual ad formats reflect what we might in any case have expected. For instance, gatefolds – where the page opens out and reveals two further pages beneath – by their physical nature demand reader attention and interaction. The additional width makes this a particularly good way of getting across a story or narrative. Butterfly gatefolds – spreads where both facing pages are themselves gatefolds – take the surprise element further, intriguing readers.

Taking another example: gifts and samples draw the reader closer to the advertiser. Samples have the advantage over vouchers in that the gratification is immediate. Gifts are warmly received and enhance the reader's perception of the advertiser and the magazine. But they must be appropriate – for the reader and the magazine. This means making a gift as personal, flattering and meaningful as possible.

Advertorials

Another creative use of ad space is advertising content written in the house style of the host magazine, with a statement at the top such as 'Advertisement' or 'Promotion' to indicate its true nature and avoid misleading the readers. These

On reading advertorials...

"It's like you are with a group of girlfriends chatting about a new product"

"A positive story about a nice product, a different story than standard advertising"

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

FIG 26. **ADVERTORIALS COMPARED WITH STANDARD ADS**

	IN PRINTED MAGAZINE		ON WEBSITE	
	Ad	Advertorial	Rectangle ad	Advertorial
Entertaining	36%	50%	37%	61%
Message recall	33%	44%	23%	88%
Brand consideration	45%	50%	57%	63%

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

are sometimes known as advertisement features, or branded content. However the most popular term is 'advertorials', a neat condensation of 'advertising' and 'editorial'. On digital platforms it is often referred to as 'native advertising'; new name but not a new concept.

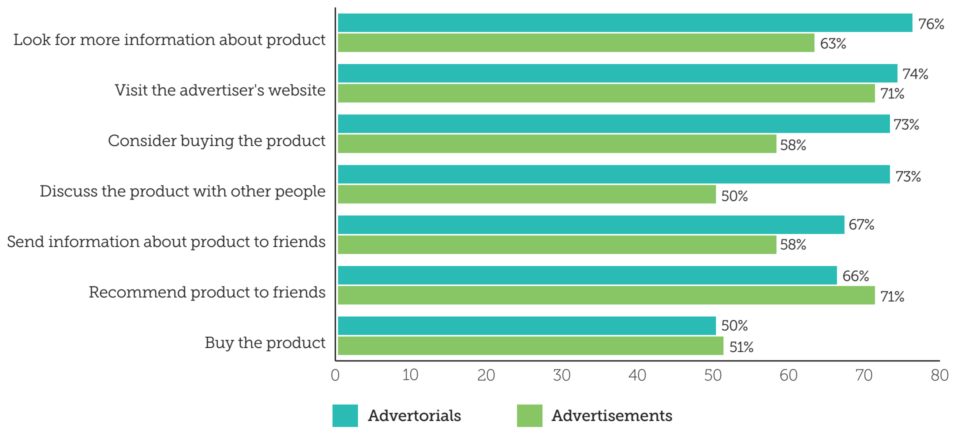
Advertorials enable the advertiser to don the mantle and sport the values of the magazine. This intimacy brings added credibility to the brand, while readers appreciate the extra material for them to read. The objective should not be to trick readers into thinking it is an editorial feature – they are 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.

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.

The survey *The Added Value of Branded Content,* published in The Netherlands by Sanoma Media and Media Test in 2012 [38], confirmed that branded content is highly appreciated, in both printed magazines and on magazine publishers' websites. 11 brands were examined. In print, conventional advertisements were compared with advertorials for the same brands. On websites, standard advertisement rectangles were compared with branded content panels for

FIG 27. **ACTION IN RESPONSE TO ADVERTORIALS**

The advertorials/advertisements make me want to...



Base: female readers of Femina magazine. Source: Usage of Multiple Platforms Of A Magazine Brand, Femina Group, Indonesia, 2013

the same brands.

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

The quantitative stage of the research measured the extent to which the advertorials performed even better than the conventional ads. Figure 26 shows that, in print, advertisement features achieved higher scores for entertainment, message recall, and brand consideration ("Which brands would you consider when buying...?").

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

A direct comparison was made between advertorials and standard ads in the Indonesian research *Usage of Multiple Platforms Of A Magazine Brand,* presented in 2013 by the Femina Group [5]. Readers of Femina women's weekly magazine were asked what action readers took in response to the ads and advertorials in Femina. The results for standard ads have already been shown in Figure 20. Figure 27 adds the statistics for advertorials.

For five of the seven forms of action, advertorials produced an even stronger response than standard ads, while for the two exceptions the differences were not great. Thus advertorials were inducing high levels of seeking further information (visiting the advertiser's websites, and seeking information elsewhere), of spreading the message (recommending the product to friends, sending information to friends, and discussing the product), and moving towards purchase (considering it, and doing it).

FIG 28. **SCENTED ADS COMPARED WITH ALL ADS**

	ALL ADS	SCENTED ADS
Noting score	54%	64%
Read any of ad*	82%	88%
Read most of ad*	42%	48%

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

Scented ads

A further example of creative use of print is to add scents to the paper, often through scent strips whereby a scent is released when the strip is pulled off the page, or when the page is scratched or rubbed. Does this affect the performance of the ad? In the USA, GfK MRI analysed their database of Starch-measured ads to find out [39]. Selecting five product categories, 6,514 magazine ads in those categories were studied during January-April 2011. Some 49 of those ads used scented paper.

The average noting score for all 6,514 ads was 54%, but for the 49 scented ads it was 64% – a 19% lift. The reading scores were higher too (Figure 28).

How many tried the scent? On average, 17% of those who noted the ad. The highest was an ad for Febreze Air Freshener & Candles in *Cosmopolitan*, where no less than a third of noters (33%) experienced the scent.

A similar finding emerged from the *Magnify* study by the PPA in the UK in 2011 [28]. Ads with fragrance strips attracted 20% higher noting scores than average. This is almost identical to the Starch figure of 19% uplift in the USA – an example of how consumers use magazines in much the same way in different countries.

The Magnify study also found that ads with fragrance strips were 58% more engaging, and 67% more 'effective' than ads without.

Digital innovations for print

Going well beyond scent strips and the like, digital technology is driving innovation in printed magazines at an unprecedented rate, with barcodes, augmented reality, watermarks and other emerging methods enabling publishers to make their printed pages more interactive, and for print to lead readers to new experiences on mobile devices – including buying products directly off the page.

Some of the most notable examples include:

» A wi-fi hotspot in a print magazine:
Microsoft, for its Office 365 campaign in 2013, installed a fully functional (if stripped down) T-Mobile router in a cardboard insert in an edition of *Forbes* in 2013, in the USA. The mini-router turned the print magazine into a portable hotspot for up to five devices for two weeks. The device operated for three hours before needing to be recharged.

» Sampling the product by eating the ad

Drinks manufacturer Fanta relaunched their orange drink in the Middle East by placing ads in Dubai-based lifestyle magazines, in which the ads were printed on edible rice paper, infused with the orange drink formula, inserted into a protective sleeve. Readers could tear off some of the ad and eat it, sampling the Fanta flavour.

» Getting a car insurance quotation from a print ad
Dubai-based insurance agency RSA embedded a thin, light, custom-built communications device into an advertising wrap for CEO magazine which allowed readers to request a car insurance

quotation straight from the ad. Users keyed their car registration number into a phone-shaped device on the page. Within minutes RSA sent a quotation to the user's mobile device.

» Charging a mobile battery on the beach
In Brazil, Nivea sunscreen installed a solar panel in their ad in the magazine *Veja Rio*. Their pitch was that you can charge your phone straight from our ad in the magazine you brought to the beach, while using our sunscreen to safely play beach volleyball for longer.

» A magazine cover that plays music

A 2013 edition of *Billboard* (Brazil) magazine was enabled with Near Field Communication (NFC) stickers behind the front cover. When readers placed their smartphone on the cover they were instantly listening to music from a playlist of artists at the Lollapalooza festival in Sao Paulo, Brazil. There was no need to download an app, engage Bluetooth, use a QR code, or do anything else; just listen.

» Changing the colours of a phone – on the printed page

Motorola gave readers the opportunity of trying different colour combinations for a Moto X cell phone – in a print ad in Wired magazine in 2014. The ad was made up of four batteries, three LEDs, some Plexiglas, and a series of buttons. Readers in the USA could customise the phone in 11 different colours by tapping different keys to try out different looks. All on the printed page.

The compelling combination of digital techniques and the printed page creates a memorable multimedia experience.

These examples are pushing the frontiers, are costly at present, and are not mainstream, but undoubtedly further innovation and scale will find ways of bringing down costs and making digitally-enhanced creative formats in print more common. Already there are many simpler applications which are striking and impactful for advertisers, such as QR codes and augmented reality apps such as Viewa, Layar, Blippar which deliver video and other material to readers' digital devices.

Further information about the examples summarised above, and many others, can be found in FIPP's report *Innovations In Magazine Media: 2014 World Report* [40].

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

All the surveys quoted in this chapter (as well as a very large number of other surveys examined) are saying essentially the same thing. They prove that advertisements in printed magazines create an impact among readers, and that this is across countries with very different media markets. It is in the nature of printed magazines.

Advertisements are a valued part of a magazine's content. For the average advertisement, 90% or more of readers are exposed to it, in the sense of eyes open in front of the page; 50-60% of readers can recall seeing it; and this proportion is strongly affected by the creative work and the reader's own interests and associations.

Among those recalling an ad – a group of subconsciously self-defined readers for whom the ad carries some significant connection – there are high levels of further mental activity and physical actions, moving readers further along the consumer journey towards purchase.

4

DIGITAL EDITIONS

- Digital editions are a growing though still small proportion of total circulation.
- They are liked for their portability, easy access, and the interactive features.
- Digital readers are an attractive target audience for advertisers: well educated and affluent, with a relatively young profile.
- Consumers use digital editions in much the same way as they use printed magazines, but interactive features mean a longer read.
- Readers become deeply engaged with their digital magazines, and are receptive to digital advertising.
- Digital ads perform as well as, or even better than, print ads, including provoking action.

MOST DIGITAL EDITIONS are close replicas of the printed magazines as far as content is concerned, with relatively limited interactive features. Some digital editions do however diverge more substantially in the scope and scale of the interactive features included.

This chapter looks first at consumers' usage of digital editions, and concludes by examining the impact of the advertisements in them.

A: CONSUMERS' USE OF DIGITAL EDITIONS

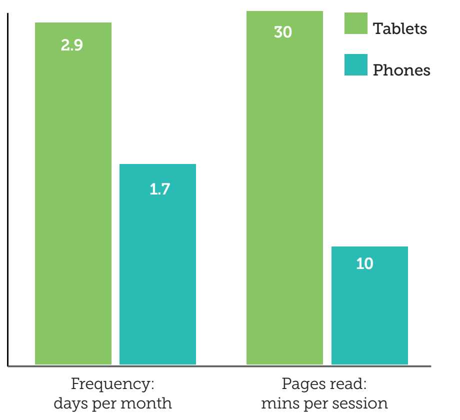
Tablet penetration

Tablet computers are the device most favoured for reading digital editions, though smartphones, PCs and other devices are also in use. Growing numbers of publishers are producing digital editions specifically for smartphones, in addition to tablet-specific editions.

Adobe Systems reported that in the USA in 2013 75% of digital edition reading was on tablets, compared with 23% on smartphones [41]. The greater comfort of using tablets is reflected in the statistics that tablet users read digital editions more frequently and more extensively, as Figure 29 shows.

Global tablet sales have rocketed since the iPad was launched in April 2010, but *IDATE/IHS iSuppli* have forecast that the global rate of growth will slow down in 2015 and 2016 [42]. The iPad's

FIG 29. **READING DIGITAL EDITIONS: TABLETS VS SMARTPHONES**



Source: Adobe Systems, USA, 2013

dominant share of the tablet market is being eroded, to the point where other brands combined are expected to out-sell iPads from 2015.

In some countries tablet penetration has already reached a point of semi-saturation where the rate of growth is slowing down. In the USA, eMarketer has forecast [43] that while the percentage of the US population with a tablet computer was 30% in 2012, rising to 41% in 2013 (11% added penetration), the figure of 44% in 2014 (only 3% added penetration) and a projected 46% in 2015 (only 2% added penetration) indicates that the explosive phase has ended. Nevertheless, even though the rate of increase of ownership appears to be slowing, tablet owners constitute a massive market in the USA, estimated to be around 138 million in 2014.

The USA is one of the leading countries in the world in terms of tablet usage, and is also a major contributor in terms of research into tablet usage, and especially usage of magazine digital editions (which is why much of the research cited in this chapter is from the USA). However it must be recognised that there are many countries where tablet ownership is still at a low level. For example, *Global TGI* from Kantar Media has found that in Brazil and Turkey tablet ownership was only 1% of all adults in 2012 [44].

Motivations for buying a tablet

The motivations for buying a tablet are dominated by its portability. IDATE/IHS iSuppli's study [42] asked adult consumers who had purchased a tablet what their reasons were. As well as being portable, tablets are also selling because they are 'cool', functional, user-friendly, and an excellent replacement for desktop and laptop computers.

None of these primary motivations for buying tablets of course: the percentage would surely have been much less than the 6% at the bottom of the chart. Publishers must therefore work hard to attract consumers to their offerings. Fortunately there are real signs of progress.

In October 2012 the Pew Research Centre and *The Economist*, in their *Project For Excellence in Journalism*, measured the uses to which tablets and smartphones were being put in the USA [45]. While the leading uses were sending or receiving email, getting news, using social network sites, and playing games, a significant minority were also reading magazines. 6% of tablet users read magazines on their tablet *every day*, and 22% read magazines on their tablet each week. Among smartphone owners the figures were lower: 4% read magazines every day and 11% did so every week.

Also in 2012, the Online Publishers Association, in their survey *Portrait of Today's Tablet User* [46], asked American tablet users about their purchases online of any type of content. 61% had purchased content, among which the most popular was reading material. 39% of tablet users had bought digital magazines, split half and half between purchasing single issues and taking out a digital subscription. 35% had bought a digital book, and 15% a digital newspaper. Purchasing video material ranked second after reading matter.

Number and circulation of digital editions

GfK MRI's *Survey of the American Consumer* [47] has been increasing the number of magazine digital editions it is measuring – as a result of more publishers creating digital editions. From 116 in 2009, the number of digital editions measured has grown to 207 in 2014 – out of 219 print titles measured. That is, 95% of measured magazines have digital editions.

Adobe Systems reported that the number of magazine downloads from their publishing system grew by an average of 36% per quarter between 2011 and 2013, a seven-fold increase in two years [41]. Similarly, the McPheters & Company's iMonitor recorded that the number of magazine-branded apps released in the USA grew by an average of 28% per quarter between 2011 and 2013, a 6.5 fold increase in two years [48].

Still in the USA, the *Alliance for Audited Media (AAM)* reported that in 2014 digital editions continue to be a growing though small portion of magazines' total circulation mix [49]. For the first half of 2014, magazines reported a total average of 11.6 million digital replica editions (paid, verified and analysed non-paid), or 3.8% of total circulation. This compares with 10.2 million digital editions, or 3.3% of total circulation, in the first half of 2013.

In Canada it is a broadly similar picture. Approximately 86% of *AAM's* Canadian magazines — 48 titles — reported digital replica editions for the first half of 2014 [50]. These editions totalled 256,000 copies, or 3 percent of total paid, verified and analysed non-paid circulation. The rate of growth has been dramatic: digital editions circulation in the first half of 2014 have more than tripled from the 73,000 average copies reported in the same period in 2013.

In the UK the Audit Bureau of Circulations' *Consumer Magazines Report, June 2014* [51], which covered the period January-June 2014, stated that 95 magazines had had digital editions audited, up from 78 a year earlier. Among these 95 titles, in 2014 the digital editions, with a total of 369,000 copies, accounted for an average of 2.5% of total print + digital circulation. Among the digital editions, 50% of the circulation was outside the home country (defined as UK + Ireland).

In these three countries, then, sales of digital editions are growing rapidly but from a very low base, and in 2014 accounted for 3.8%, 3.0% and 2.5% of total circulation respectively (Figure 30).

[4] DIGITAL EDITIONS

FIG 30. **DIGITAL EDITIONS AS PERCENT OF TOTAL CIRCULATION**

Sources: AAM (USA & Canada) & ABC (UK), 2014

Digital edition readership

The GfK MRI *Survey of the American Consumer* [47] found that in 2013 5.2% of American adults were reading the digital edition of at least one magazine. Among iPad owners the proportion was 17.5%. This represented significant growth compared with earlier years. Yet by Spring 2014 there was a further increase of 16% in year on year digital penetration. MRI speculated [52] that the growth was due not only to the increased number of digital editions but also the adoption of joint subscriptions to print and digital editions, faster download times, the arrival of more distribution sources such as Apple's Newsstand, and enhancements to the digital products themselves.

Reading in both formats

The same survey recorded that, among readers of magazines in any form, 5.9% were reading in both print and digital formats, while only 0.6% were digital-only readers. The remaining 93.5% were of course print-only. Thus the great majority of those reading digital editions also read some print magazines – not necessarily print editions of the same titles as read digitally.

In 2013 four publishers – Condé Nast, Hearst, Meredith and Time Inc - commissioned a survey of subscribers to 27 large-circulation magazines: the *Digital & Print Subscribers Study* [53]. It found that 44% of digital-only subscribers also read at least one issue of the same magazine in printed format (among the most recent 6-8 issues). Moreover 18% of print-only subscribers had read a recent issue of the magazine in digital format.

This relatively high dual usage of print and digital editions suggests that there is a distinct and complementary role for each platform for many readers.

This notion is perhaps reinforced by the fact that digital magazine readers read more *printed* magazines than those who read printed magazines only. In the *Survey of the American Consumer* [47] people reading any digital magazine also read 8.2 printed magazines, whereas those reading only printed magazines read 7.1 magazines, on average, during the relevant issue periods.

The survey also found that 43% of digital edition readers read more than one magazine in digital format.

Profile of readers of digital editions

In the USA the survey of subscribers to 27 large-circulation magazines, the *Digital & Print Subscribers Study* of 2013 [53], found that, compared with print-only subscribers to the same titles, digital-only subscribers were:

- More male, across almost all the 27 magazines
- More likely to be under 35 and much less likely to be 55+
- More likely to have children

There was no consistent pattern with respect to income and education.

The demographic profile of subscribers who as part of a package have access to both print and digital products of a magazine (referred to as 'authenticators') tended to fall between those of the print-only and the digital-only subscribers. Authenticators are especially well-educated affluent magazine readers who are interested in trying a new platform for magazines but are not as fully immersed in digital culture as younger, more male magazine readers who are less reluctant to part with a print edition.

The UK-based Future Plc is moving heavily towards digital publishing of its portfolio of technology, games, movie and other special interest titles. Most digital sales are through Apple Newsstand, and Future conducted a survey among Newsstand subscribers, reported in 2013 in *Apple Newsstand: a new era in publishing & new opportunities* [54].

UK digital subscribers had an average income of £56,000 compared with £27,000 for print subscribers, and the same pattern held good for USA subscribers.

Future looked at the possibility of cannibalisation of print sales by digital sales. They found that 43% of Newsstand subscribers had previously regularly bought their print magazines, but 1 in 3 subscribers had never done so. Detailed analysis of Future's internal sales figures led the company to estimate that cannibalisation accounted for only about 2% of sales.

A striking finding was the global reach of the Apple Newsstand subscribers: only 17% were in the UK home country, 42% were in the USA, 17% in continental Europe, 9% in Australia, and 15% in the rest of the world. Newsstand is clearly barrier and custom zone free, opening up new audiences.

Data from many other countries show some consistency in finding that readers of digital editions of magazines, and owners of tablets, tend to have above-average incomes, are better educated than the general population, and are skewed towards the younger end of the age range. They are a very desirable target audience for many advertisers.

Reasons for reading digital editions

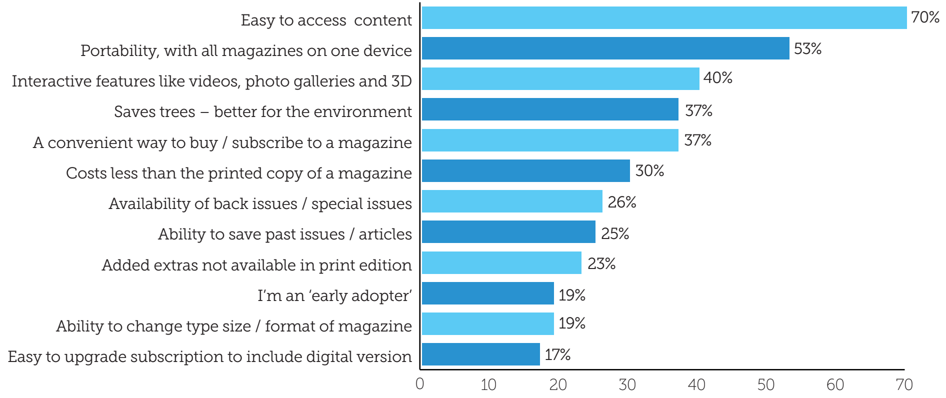
In the USA, MPA The Association of Magazine Media commissioned a survey called *The Mobile Magazine Reader*, published in 2012 [55]. It revealed a varied range of reasons for reading in digital format (Figure 31), of which the most popular were "It's easy to access the magazine's content and articles" (70% agreed), "The portability of having all my magazines on one device" (53%) and "I like the interactive features like videos, photo galleries and 3D views" (40%).

The subscriber survey *Apple Newsstand* reported in 2013 by the UK's Future Plc [54] found that 48% of digital readers agreed that it was more convenient than print, 43% cited ease of storage, 31% were attracted by the discounted price compared with print, and 31% liked it being environmentally friendly.

Mode of reading

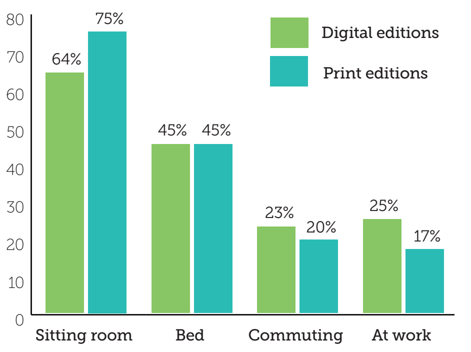
In terms of the format in which tablet owners read magazine content, the most popular way for Americans was through apps, with 65% of tablet owners who read a magazine on it in the last 30 days doing so via an app, according to a 2012 analysis of the GfK MRI *iPanel* [52]. 47% of tablet owners accessed magazine content by visiting the website, and 37% read a digital reproduction of the printed magazine. Tablet ownership also encourages readers of both genders to read back issues of magazines. 19% of tablet owners on the iPanel who read a magazine on their device in the previous 30 days also read back issues of the same title.

FIG 31. **REASONS FOR ACCESSING MAGAZINES IN ELECTRONIC FORM**



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

FIG 32. **WHERE DIGITAL EDITIONS ARE READ**



Source: Apple Newsstand: New era in publishing and new opportunities, Future, UK, 2013

A Meredith/MediaVest study in the USA compared digital and print editions of Meredith magazines among female iPad owners in 2011 – reported in a conference paper called *Guidelines for Maximising the Value of Tablets versus Print Magazines* [57]. In comparing print and digital magazine experiences, there were some obvious differences, mainly arising from interactivity, but there were also high levels of similarity. Tablets offer new interactive tools which have the potential to transform and enhance the reading experience. However women are reading on tablets in a fairly linear way, like printed magazines. Around three-quarters read the magazine from front to back, in both formats. In digital format, the front-to-back mode can be disturbed by clicking on links, zooming in and out, and using the navigation tools to find specific content.

Also from the USA, Condé Nast reported in a 2011 conference paper *Behavioral Metrics for Assessment of Tablet Audiences & Advertising* [58] that reading of magazine digital editions on tablets strongly resembles the behaviour long observed with printed magazines – and contrasts with the quicker, more fragmented styles of reading associated with websites.

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

Further examples on this point – that print and digital editions are read in similar ways – are given in later sections.

Place of reading

UK's Future's *Apple Newsstand* 2013 survey [54] compared their print and digital titles in terms of where they were read (Figure 32). Reading in the comfort of home, generally in the sitting room, is the most popular place for reading digital editions, just as it is for print, though at a rather lower level. Just like with print, reading on a tablet is mainly a truly immersive lean-back enjoyable reading experience. For even more relaxed reading, 45% read in bed, for both digital and print.

Commuting is significant, with around a fifth of readers of both formats doing this. There is rather more reading of digital editions at work than for print editions.

FIG 33. **READING TIMES BY PLATFORM** (minutes per issue)

	Vogue	GQ	Wired	Vanity Fair	Glamour
Print	122	131	137	169	117
Digital edition	116	110	142	154	104
Print+Digital	162	176	158	188	141

Source: Print & Digital Subscriber Survey, Condé Nast, UK, 2013

The survey also found high reader satisfaction with the experience of reading on a tablet.

The Meredith/MediaVest *Guidelines* study mentioned earlier [57] agreed that digital magazines are mostly read at home. Portability is within the home, moving from room to room, rather than outside the home. Overall, print editions are more 'mobile' than digital editions – that is, reading magazines outside the home is more common in print.

Time spent reading

The time consumers spend on their tablets is growing. In their 2014 report *Tablet Magazine Advertising* [59], Kantar Media in the USA have estimated, from eMarketer data, that in 2013 tablet users spent an average of 156 minutes per day using their tablet, a 40% increase on the 112 minutes per day in 2011.

In parallel with this, a considerable time is spent reading digital magazines.

The Future survey *Apple Newsstand* [54] found that the average time spent reading their digital titles was 1 hour 42 minutes. This was spread across an average of 5.3 reading occasions – not very different from their print equivalents averaging 6.3 reading occasions.

Also in the UK, Condé Nast found that the reading times for a digital edition of each of its flagship magazines was comparable to that of the print edition. The 2013 *Print & Digital Subscriber Survey* [60] compared reading times per issue of print-only, digital-only and cross-platform print+digital subscribers for five brands (Figure 33).

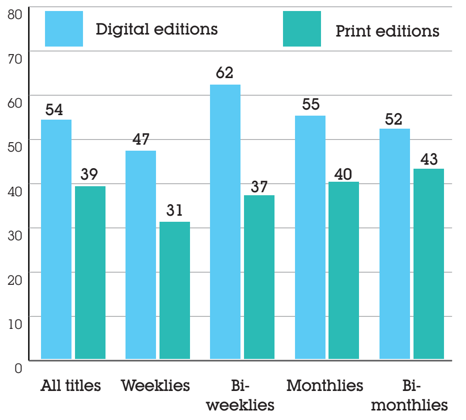
For four of the five brands, the reading times for the two formats were within plus or minus 12% of each other, and for the fifth brand the difference was only 20%.

It is also notable that for all five brands the highest average reading times were among subscribers who had access to both formats. The explanation may be partly due to the effect of having both formats available, on some occasions using one, on other occasions using the other; and it may be partly that the most intense readers are more likely to go on to become dual-format subscribers.

Condé Nast stated that “this research debunks the assumption that people read print and digital magazines in different ways, and for different periods of time”. The same conclusion was drawn by another publisher, Hearst Magazines UK, as a result of their own study of *Reading Digital Editions on Tablets* in 2013 [61]. It found that readers consume digital editions in a similar way to print editions. Users were as engaged with digital editions as they were with print, and picked up and put down tablets in a manner akin to their pick-ups of printed magazines. Hearst’s findings about tablet readers included these:

» 90% say enhanced features need to be relevant and genuinely add something.
» 88% prefer to read basic stacked articles in linear format
» 85% will continue to buy digital editions
» 70% enjoy the ‘fun’ format of digital editions
» 46% will alternate between both print and digital editions

FIG 34. **TIME SPENT READING DIGITAL & PRINT EDITIONS** (minutes)



Source: Survey of the American Consumer, GfK MRI, USA, 2013

The *Survey of the American Consumer* [47] found in 2013 that digital magazines were read for even longer than print magazines. Digital editions were read for an average of 54 minutes, compared with printed magazines being read for an average of 39 minutes. This held true for all frequencies of publication, as Figure 34 shows.

The Meredith/MediaVest *Guidelines* study [57] agreed that there were small differences in overall time spent reading between printed and digital editions, and it was digital editions which generated the slightly higher time spent reading, due to the interactivity of digital editions. One respondent remarked “I actually spent more time reading this version since I was interested in tapping on all the added features. It was a great pleasure going through the digital version”. Getting more information *on demand* was valued.

Engagement

The considerable time spent reading reflects users’ deep engagement with their tablets and the magazine content on them. There is further evidence about engagement.

In Brazil in 2013 publisher Abril and research agency Ipsos released their study *Measuring the Level of Engagement of Digital Magazine Readers* [62]. It was partly a methodological study to establish the most suitable factors by which to measure engagement with digital editions of magazines: they concluded that influence, satisfaction, involvement, interaction and intimacy were the key criteria.

A quantitative element of the study interviewed 897 readers of digital editions of magazines. In addition to finding that the average reading time was more than two hours

“It combines many fun elements. It’s like reading your favourite magazine while watching your favourite TV show – reading articles and watching clips. It’s also like a library at your fingertips as you explore the information in the magazine. It is a unique entertainment experience.”

“It makes reading more enjoyable and informative. Often when you read a print magazine you see something that catches your eye and you think, oh I should look that up later – but you rarely do. This makes it easy to do just that. I also love the ability that I can keep numerous issues with me at all times. I always have something to read.”

Respondents in Guidelines study, Meredith/Mediavest [57], USA, 2011

- an indication of deep engagement - 47% read the whole magazine, many resumed several times, and 9 out of 10 who read more than once did so on different days.

There was considerable action taken as a result of reading a digital edition. 75% of readers had visited the magazines’ websites, and 30% had sought further information from other online sources or social media. The net effect was that 81% had sought more magazine content after reading a digital edition.

56% of readers had commented on the contents of digital editions with friends or family. 45% of readers had done so in person, 15% in social networks or blogs, and 12% by email.

89% had read advertisements and 77% had interacted with them.

There were high scores for intimacy (“I like my digital magazine very much”, “It is my moment of choice”, “It makes me feel good” and “It’s important for me”), influence (recommending reading the magazine, and leading opinion on topics in the content) and satisfaction (high ratings for satisfaction, and intention to continue reading in digital format).

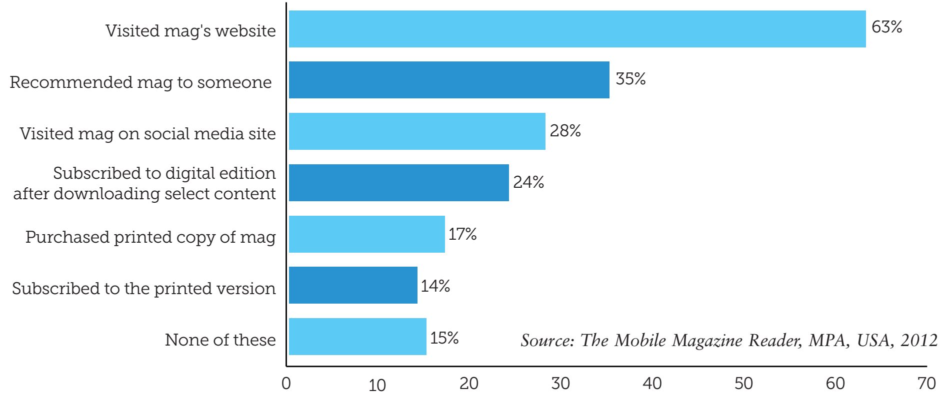
To summarise the Brazilian study, readers of digital editions were deeply engaged, spending a long time reading; readily shared information from the magazine with other people, and made recommendations; had often sought more magazine content from other sources such as the title’s website or social networks; and showed high levels of satisfaction.

The subscriber survey *Apple Newsstand* [54] from the UK’s Future Plc found engagement levels among digital readers to be similar to those of print readers. For example, averaged across the portfolio, 72% of readers read all or most of the copy in the digital editions.

However certain differences did emerge. Digital is an even more personal read, less inclined to be shared with others. The average readers per copy for Future’s print titles is 1.5 but for digital it is 1.1. This is understandable because a tablet has high value, contains a lot of personal information, and is used for many other purposes, so it is less likely to be loaned or left on a coffee table as a printed magazine might be.

The Meredith/MediaVest *Guidelines* study in the USA [57] reported that, while personally relevant

FIG 35. **ACTIONS TAKEN AS RESULT OF READING DIGITAL MAGAZINES**



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

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

An analysis by Adobe Systems in 2012 [63] looked at worldwide usage of tablet publications produced via the Adobe Digital Publishing Suite. It found that interactive features such as web views, videos, slide shows, audio and so on, heavily influence engagement. Readers interacted with 48% of all the interactive features in the apps. Web views and video are the two formats that captured the most interaction, said Adobe. And every fifth page viewed is an advertisement. An app gets opened up to five times per month, on average.

Another sign of engagement is action taken. *The Mobile Magazine Reader* [55] found that, in addition to reading, 85% of respondents had taken some other action as a result of reading digital magazines. The most common were visiting the magazine's website (63%), recommending the magazine to someone (35%) and visiting the magazine on social media site (28%). Figure 35 gives further details.

Actions concerning advertising are discussed later in the chapter.

Why print will co-exist with digital formats

The Meredith/MediaVest *Guidelines* study [57] which compared digital and print editions of Meredith magazines among female iPad owners, described why the authors thought print will continue to co-exist with digital formats.

1. The permanence of paper, exemplified by these respondents:

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

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

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

2. The appeal of paper:

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

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

3. The shareability of paper:

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

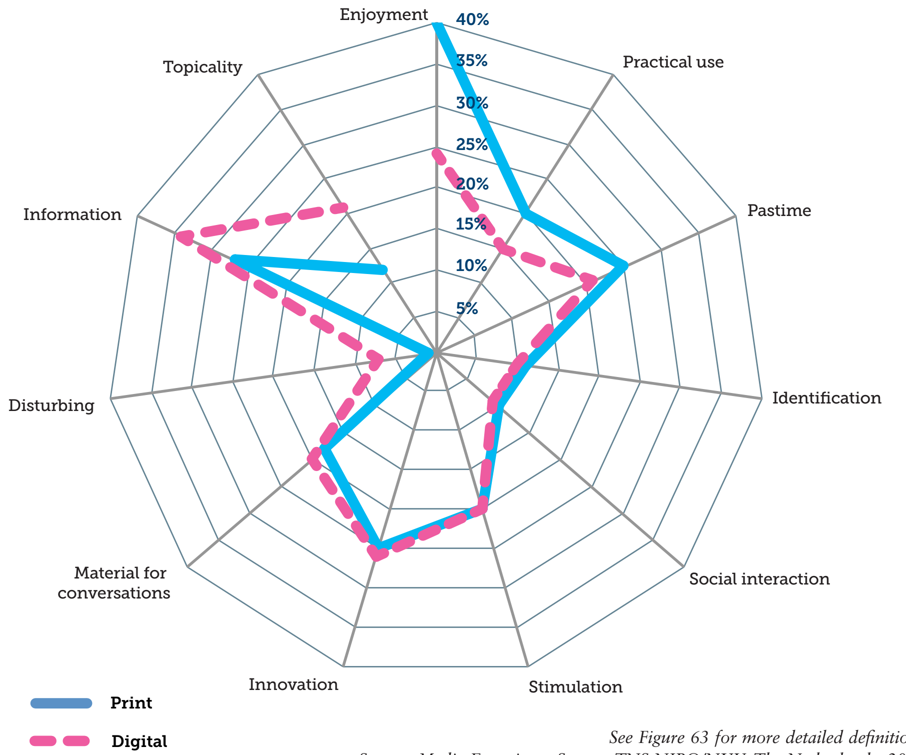
Print and digital complement each other; neither will disappear. The digital format offers a new and different way for consumers to interact with their favourite magazines.

A spidergram of print versus digital

The *Media Experience Survey*, conducted by TNS NIPO Netherlands and published by the NUV Dutch Publishers Association in The Netherlands in 2012 [64] gave a fresh viewpoint on the differences and similarities in the satisfactions derived from publishers' print and digital offerings. Here, digital means PCs, tablets and mobile phones.

A spidergram (Figure 36) showed that the principal distinctions are that print is more

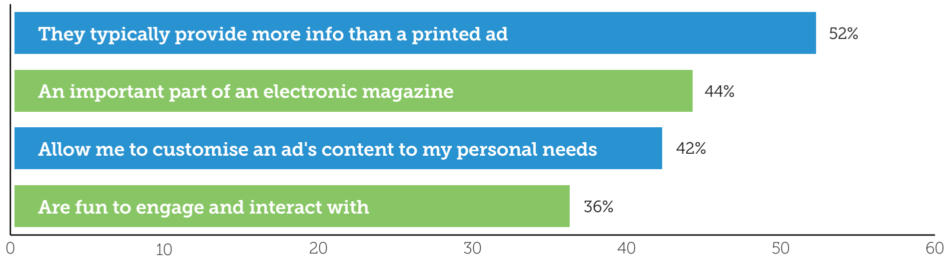
FIG 36. **COMPARISON OF PRINT & DIGITAL FORMATS FOR MAGAZINE CONTENT**



See Figure 63 for more detailed definitions
Source: Media Experience Survey, TNS NIPO/NUV, The Netherlands, 2012

FIG 37. **ATTITUDES TO ADS IN DIGITAL MAGAZINES**

% agreeing with statement



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

oriented towards enjoyment/relaxation while the same publishers' digital content is more notable for topicality and information. Otherwise the prime impression created by the spidergram is how similar the plots are for print and digital in most respects - in 8 out of 11 factors. Also notable is that irritation is negligible for print, and very low for digital.

B IMPACT OF THE ADVERTISEMENTS

Digital edition advertisements may be divided into three categories of format. Time Inc defines them in this way [65]:

Straight from print (SFP): Tablet issue ads where the page on the screen looks exactly like the print page. They can have one active URL link to an external website.

Designed for tablets (DFT): Tablet issue ads designed specifically for reading on tablet devices. They can have one active URL link to an external website.

Enhanced for tablets (EFT): Tablet issue ads with interactive features that take advantage of multimedia functionality. This may include video, photo galleries, hot spots, animation, social media, etc.

Desirable target audiences

Digital editions, whether as replicas of a print edition or as apps, attract very desirable target audiences for many advertisers. Typical readers of digital editions of magazines, and owners of tablets, have above-average incomes, are better educated than the general populations, and are skewed towards the younger end of the age range.

Users of digital editions also show in another way that they form a premium audience: they are willing to pay significant sums to subscribe to digital editions. This is of course in contrast to expectations concerning websites, where consumers generally expect content to be free.

In addition, as this chapter will show, magazine digital audiences are very receptive to advertising messages on their devices, especially those advertisements with interactive elements. The subscriber survey *Apple Newsstand*, reported in 2013 by the UK's Future [54], found that 62% of their digital subscribers had taken further action after seeing an ad.

Advertisers are responding

Advertisers are responding to these opportunities. In the USA Kantar Media, in their 2014 report *Tablet Magazine Advertising* [59], found that the total number of tablet ad units grew by 21% in 2013 compared with 2012.

There was also an increase of 22% in the modest number of brands advertising in magazine tablet editions but not in the print editions.

Receptive to the advertising

Just as in printed magazines, in digital editions consumers are receptive to advertising which is relevant to them. The MPA's 2012 report *The Mobile Magazine Reader* in the USA [55] found considerable agreement with positive statements about the advertising – shown in Figure 37. Many readers agree that the ads typically provide more information than those in print, and users can focus their attention on the elements of most relevance, thus in effect customising the ad's content to their personal needs.

More than a third agreed that the digital ads "are fun to engage and interact with". 73% of readers have read or tapped on advertisements in digital editions. Consequently the ads are an important part of a digital edition's content.

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

The survey *Reading Digital Editions on Tablets* from Hearst Magazines UK [61] found these results among tablet readers:

- » 80% like ads that link directly to the advertised product
- » 78% like to be able to tap the ad to find out more
- » 70% think ads in digital editions are impactful and sharp
- » 64% would spend more time with a digital ad they could engage with
- » 55% say they feel more favourable towards a brand as a consequence of seeing an ad in a digital edition

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

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

GfK MRI in the USA used their *Starch Ad Measure* service (for printed magazines) and *Starch Digital* (for tablets) to make comparisons based on 2012-2013 fieldwork. Results were reported in a conference paper in 2014, *Magazine Digital Editions* [29].

Figure 38 gives averages for print and digital editions of the same magazine issues, covering the same collection of ads, in a like-for-like comparison.

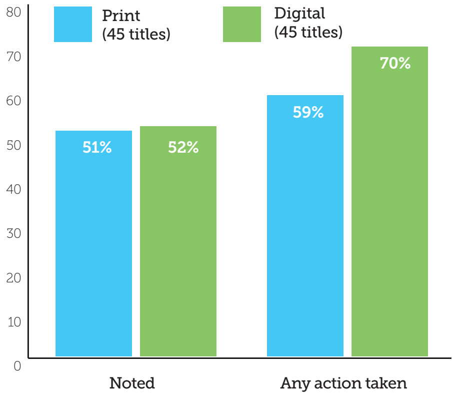
The average ad noting scores show that ads were recalled in tablet and paper editions to about the same extent, averaging 52% noting for digital editions and 51% for paper versions of the same issues. (The overall average for *all* print magazine ads covered by Starch is 52%.)

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

The 'action taken' question is asked as a follow-up about those ads that a given respondent recalled seeing ('noted'). Possible actions taken include visiting the advertiser's website, speaking to someone about the product/service, purchase consideration, purchase, and so on. The results indicate that ads in paper editions provoke considerable levels of action among noters (59% take some action), but tablet ads generate more action (70%) because tablet ads tend to be more interactive.

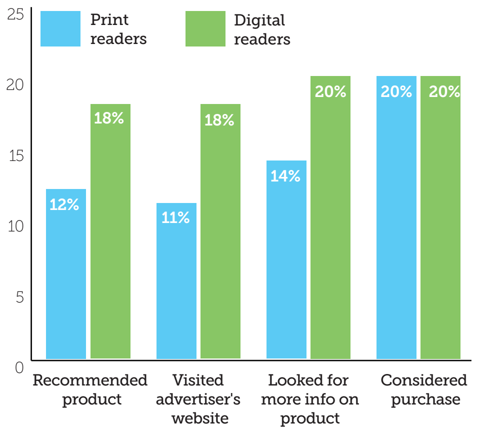
An analysis of specific actions taken showed that actions involving web searching tended to yield higher activity among digital readers, who could take the action immediately on the same device. Figure 39 shows data for four of the seven listed actions. Digital readers were substantially more likely to visit the advertiser's website, or look

FIG 38. DIGITAL ADS PROVOKE MORE ACTION THAN PRINT ADS



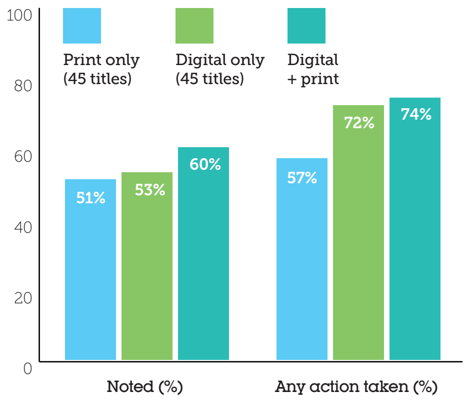
Base for Action Taken scores: those who noted ad.
Source: GfK MRI Starch & Starch Digital, USA, 2013

FIG 39. DIGITAL READERS ARE MORE ACTIVE IN WEB SEARCHING



Base for Action Taken scores: those who noted ad
Source: GfK MRI Starch & Starch Digital, USA, 2013

FIG 40. DUAL FORMAT READERS: HIGHEST NOTING & ACTIONS



Based on same 44 magazines for all three universes.
Base for Action Taken scores: those who noted ad
Source: GfK MRI Starch & Starch Digital, USA, January-August 2013

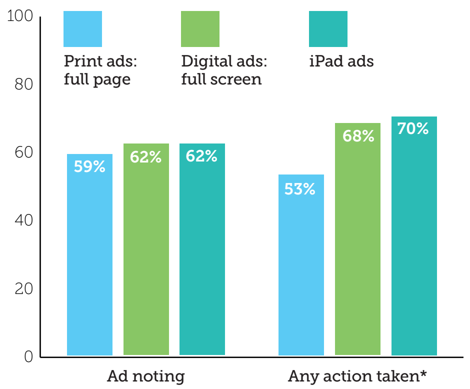
for more information about the product or service, than print readers. Having done their research, digital readers were also more likely to recommend the product or service to others. There was however no difference in purchase consideration.

GfK MRI also found in 2013 [66] that consumers who have access to both digital and print editions of the same issue record higher ad noting and actions taken than either print-only or digital-only readers of an issue (Figure 40). This ties in with Condé Nast UK's findings (reported earlier) that dual-format subscribers spent more time reading than single-format subscribers.

GfK MRI's results are comparable to some from an earlier source, the *VISTA Digital* tracking service from Affinity Research in the USA, which also provided norms for digital magazine ads on mobile devices (Figure 41).

Based on January-October 2011 fieldwork [67], the average ad recall for full page digital ads, and the subset of iPad ads, was 62%, a

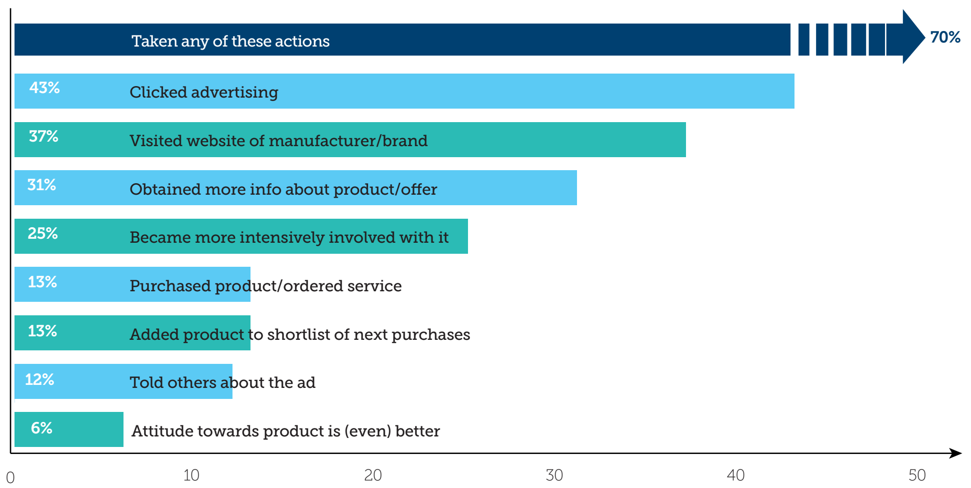
FIG 41. COMPARISON OF PRINT AND DIGITAL ADVERTISEMENTS



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

FIG 42. ACTION TAKEN AFTER SEEING IN-APP ADS

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



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

shade higher than for print ads (59%). It is in terms of actions taken by those who noted the ads that digital ads (68%), and iPad ads in particular (70%), rose well above the levels recorded for print ads (53%).

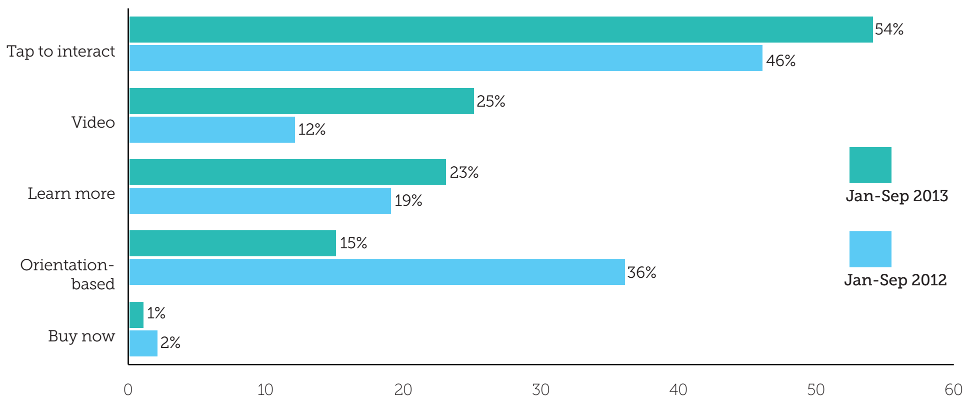
Although Starch and VISTA did not use identical research techniques, they did agree on two major conclusions – that on average:

» Digital ads match or slightly better the levels of ad noting achieved by print ads; and
» Digital ads on tablets generate even higher levels of action than print ads (no doubt largely because of the interactive features built into many digital ads).

Axel Springer's *iPad Media Impact Study* in Germany [68] also found that ads within tablet editions were actively used and animated people towards purchase. Asked "What have you ever done after seeing an ad in an app?" 70% had taken action (Figure 42). Most concerned getting more involved with products. A minority had made

FIG 43. TYPES OF INTERACTIVE FEATURES USED

Proportion of interactive tablet ads using the feature



'Tap to interact': requiring user to tap, swipe, etc. 'Orientation-based': rotate and change as tablet is moved from landscape to portrait. 'Buy now': offering a transactional feature. 'Learn more': displays 'learn more' features. All interactive ads = 100%. Some ads used more than one feature. Source: Tablet Magazine Advertising, Kantar Media, USA, 2014

a purchase, or shortlisted it for the next purchase. Some had talked to others about the ad.

Greater engagement for tablet ads with interactivity

The ability to add interactivity gives tablet advertising a vital extra dimension. While ad engagement for static ads is as high as for print ads, those ads with interactive features engender even greater engagement.

As yet, the degree of interactivity in the digital advertisements is relatively low. A report from Kantar Media, *Tablet Magazine Advertising*, published in 2014 [59] showed that in 2013 it was still the case that the great majority of tablet advertisements in the USA did not have interactive features. However on the positive side a greater share of the interactive ads sported more advanced forms.

Figure 43 indicates that in 2013 higher proportions of interactive ads used video, tap to learn more, and other forms of tap to interact, compared with 2012. The feature which was losing popularity was the simple format where ads rotate and become markedly different when the orientation of the tablet is changed from portrait to landscape or vice versa.

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

> "You can interact with the adverts, which is fun – that's what the tablet is all about"
>
> Reader of Country Homes & Interiors. Digital Edition Advertising, IPC Media, UK, 2014

FIG 44. INTERACTIVITY GIVES TABLET ADS EXTRA DIMENSION

Average time spent per user (indexed on static ads)

	Beauty products	Retailers	All category average
Static ad	100	100	100
Ads with:			
Video	182	187	187
URL	108	172	138
Hotspot	114	165	135
Gallery	130	105	114

Definitions: Static: no interactive features. URL: link added. Video: video fully integrated into ad so no internet connectivity needed. Gallery: extra images added. Hotspot: areas to tap to show extra information. Source: Adobe Analytics, reported in Digital Edition Advertising, IPC, UK, 2014

FIG 45. PERFORMANCE OF INTERACTIVE FEATURES

	% of ads with this feature	% noters who took action*
Accessed a website through the ad	50%	34%
Touch/clicked to expand/rotate	50%	31%
Accessed social network through ad	4%	25%
Watched video or commercial	1%	30%
Viewed multiple pages of ad	1%	30%

**Base: those noting the ad (among ads with this feature) Source: GfK MRI Starch & Starch Digital, USA, 2013*

In the UK the *Digital Edition Advertising* study published in 2014 by IPC Media [69] compared five tablet ad formats, in terms of the average time spent reading advertisements, across several product categories, as reported by Adobe Analytics (Figure 44). Nine brands were measured, each of which ran ads across all five tablet formats, during a five month period.

In all product categories, the four types of interactive ads outperformed the static ads.

Simply adding an URL link raised the average time spent on an ad. Offering galleries of extra images, or hotspot areas to show extra information, did the same. Most effective of all was embedding video which was fully integrated into the ad so that no internet connectivity was required; in these cases consumers typically spent almost twice as long on the ad as on a static ad.

On average, adding an interactive feature increased dwell time by 45% compared with a static ad.

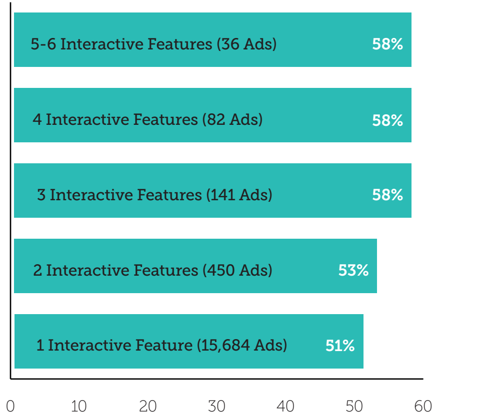
In the USA GfK MRI also reviewed the benefit of interactive features in digital ads, through their Starch Digital service [29]. Figure 45 reveals average action scores. For each of these five features, between a quarter and a third of readers who recalled seeing the ad went on to take the action. For example, among digital ads with a video or commercial, 30% of those who noted the ad watched the video content. This represents a high level of engagement.

Starch Digital measured several other types of interactive feature (downloaded an app; played a game; etc) but less than 1% of ads contained any of these features.

Another instructive analysis of Starch Digital's data underlined in a different way how interactive features strengthen readers' engagement with the publication. The more interactivity, the greater the engagement. Figure 46 presents noting scores by number of interactive features.

FIG 46. **THE MORE INTERACTIVITY, THE GREATER THE ENGAGEMENT**

Average noting %



Source: GfK MRI Starch & Starch Digital, USA, 2013

For digital ads with one interactive feature, the average noting score was 51%. The score rose slightly if there were two interactive features, and rose further if there were three or more.

In another examination, Time Inc in the USA examined Adobe Analytics/Omniture data on the time spent viewing each digital ad in Time's portfolio of magazine brands. Reporting on the results in a 2013 paper called *Beyond 'How Many?'* [65], Time Inc explained that time spent reading an ad was chosen as a general measure of engagement, because in digital issues an ad normally occupies a full tablet or smartphone screen (giving the advertiser 100% share of voice for what is visible) and the time spent with that ad is controlled by the consumer, who initiates the ad exposure by swiping to an ad page, and can swipe away from that ad page at any moment.

For the analysis, digital ads were divided into two groups: those enhanced for tablets, with interactive features such as video, photo galleries, hot spots, animations, social media, etc (EFT ads, defined earlier); and those without interactivity other than a maximum of one active URL link to an external website (SFP and DFT ads).

Based only on advertisers who submitted both kinds of ad, the analysis found that the interactive ads led readers to spend an average of 23% more time reading the ads than the non-interactive ones for the same products (Figure 47).

Another analysis of the database found a marked difference in time spent according to the number of pages (screens) occupied by ads. Indexing the median time spent on a one-screen ad as 100, 2-screen ads scored 198, 3-screen ads 300, and 4-screen ads 351. Interestingly, there was a diminishing returns effect: 2 screens doubled the score, 3 screens tripled the score, but a 4th screen only added a further 51%.

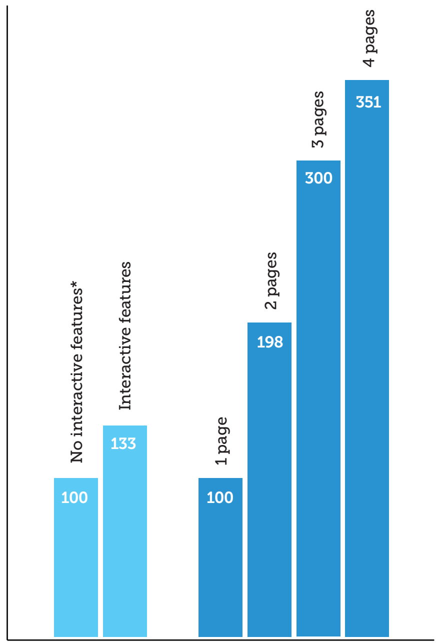
The UK survey *Tablet Ad Formats Study*, published by the Internet Advertising Bureau (IAB) in 2012 [70], closely matched the Time Inc survey in its estimate of the benefit of interactivity. Although dealing with advertisements in newspapers rather than magazines, it found that dwell time on interactive ads was on average 31% longer compared with static versions of the same ads – almost identical to Time Inc's 33%.

The IAB study also found more favourable reader perceptions of interactive ads compared with the static versions. Indexing the scores for static ads as 100, interactive ad scores were:

» Engaging: 240
» Innovative: 338
» Memorable: 190
» Ordinary: 57

FIG 47. **INTERACTIVE & MULTI-PAGE DIGITAL ADS INCREASE DWELL TIME**

Time spent viewing digital ads (indexed)



**Except maximum of one URL Based on brands using both types of digital ad Source: Adobe Analytics, 'Beyond How many?', Time Inc, USA, 2013*

FIG 48. **WORD OF MOUTH RECOMMENDATIONS: BRAZIL**

How often do you recommend a brand, product or service advertised in the digital magazine?	Always	Almost always	Sometimes	Rarely	Never	Always + almost always + sometimes
Recommend in person	7%	20%	39%	21%	14%	66%
Recommend by posting on blogs or social media	4%	13%	27%	26%	30%	44%
Recommend by email	3%	12%	27%	28%	31%	42%

Source: Measuring the Level of Engagement of Digital Magazine Readers, Abril/Ipsos, Brazil, 2013

PANEL 3:

DIGITAL ADS: BEST PRACTICE

1. Advertising is welcomed: Especially in iPad apps. Don't hide. Focus on being a good ad that stands out from the editorial content.

2. Signpost interactivity In-app ads should use clear and intuitive signposting with obvious cues that guide towards a straightforward gateway to deeper content.

3. Inform and entertain The in-app format allows advertisers to link to a large amount of content, but the most impactful ads combine this additional content with an entertaining and rewarding experience.

4. Print and digital replicas To publishers the digital replica may represent a unique delivery format but to the reader it's still fundamentally a magazine. Same content, same advertising, leading to the same positive response to ads in both formats.

5. Attract and entertain Unlike the in-app version, print and digital replica ads are not expected to entertain; they should simply catch the reader's eye and provide information that is new, relevant and useful.

Source: Advertising Best Practices in a Multi-Platform World, Hearst Magazines/Ipsos, USA, 2011 [71]

Digital readers influence others through recommendations

Like many other surveys, the Brazilian study *Measuring the Level of Engagement of Digital Magazine Readers* [62], in 2013 from Abril and Ipsos, found digital readers exerting considerable influence on others in response to advertisements seen. As Figure 48 shows, a large proportion of them always, almost always or sometimes recommend advertised products to friends and/or family – 66% in person, 44 via blogs or social media, and 42% by email.

Ads in print and digital editions

What is well known, and is evidenced in several chapters of this book, is that a multiplier effect occurs when more than one media form is used in an advertising campaign. Each medium enhances what is understood from the other media.

Clearly this can apply when a campaign uses both print and digital editions of magazines, and this chapter concludes with a simple illustration of it.

In SPH Magazines' 2014 report *The Singapore Women Digital Study* [72] the women respondents were asked about their attitudes to advertising that uses both formats. High levels of agreement (strongly agreed + slightly agreed) were found to the three statements shown in the accompanying circles (below). ❤

I'm more inclined to buy if ads appear on both print and digital:
85% AGREED

Brands that advertise on both print and digital get their message to consumers better:
87% AGREED

I welcome creative advertisements on both print and digital formats:
91% AGREED

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5

PUBLISHERS' WEBSITES

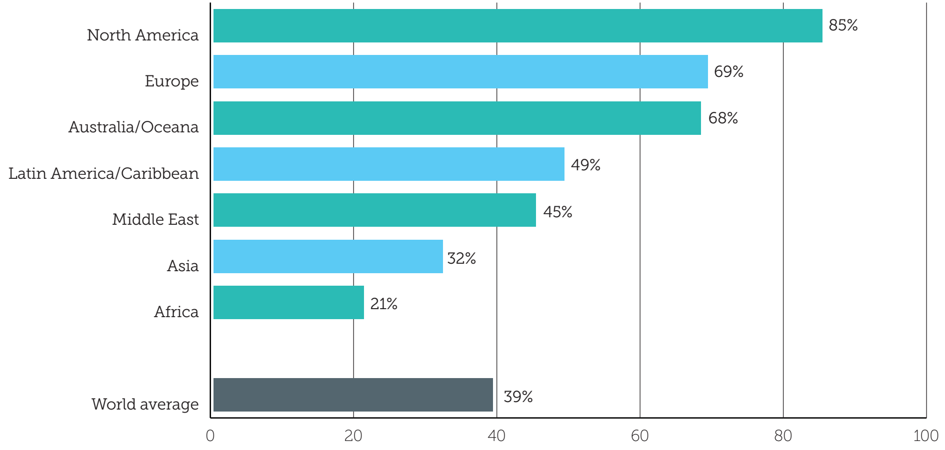
- Publishers' print editions and websites complement each other.
- Innate values – such as trust – of the print brands transfer onto their websites, which rubs off onto advertisers.
- Magazine websites are a natural home for native advertising.
- Publisher websites' self-selected audiences means the ads (like the editorial content) have high relevance to the visitors.
- Original content sites (such as magazine websites) perform better for advertisers than portals or social networks.
- The multiplier effect from using a brand's print and website properties benefits advertisers, and key performance indicators improve.
- Advertising on magazine websites has been proved to lift sales significantly.

THE INTERNET is still growing rapidly but it is not yet universally near saturation point. For example, while internet penetration is 80% or more in very many countries, there are also many countries in which it is much lower. Miniwatts Marketing Group of Columbia who publish the *Internet World Stats* database [73] estimated that at the beginning of 2014 worldwide internet penetration was only 39% of the world's population (Figure 49). While penetration reached 85% in North America and 69% in Europe, it was only 21% in Africa and 32% in the vast market of Asia.

Moreover, there were some large differences between countries within region. For instance, within Africa South African internet penetration was 49% but there were many countries where it was less than 4%. Similarly within Europe, while Norway was recorded with 97% internet penetration several countries were shown with less than 50%.

Generally speaking, as internet usage approaches saturation among the population, it is only the oldest age groups and the poorest social grades where internet usage falls well short of universality. For example the 2014 *National Readership Survey* in the UK [17] showed that while 79% of adults aged 15+ had accessed the internet in the last 12 months, and 94% of 15-44 year olds, the percentage of 65+ year olds was

FIG 49. **WORLD INTERNET PENETRATIONS BY GEOGRAPHIC REGION** *



Source: Internetworldstats.com/Miniwatts Marketing Group, Columbia, 2014
** As at 1st January 2014*

only 43%. In terms of social/economic grade, internet usage was almost universal among the more affluent groups, and averaged at least 70% among the middle and lower groups; only among the lowest economic category, the E grade, was usage lower, but even here 54% had used the internet. There was little difference in usage between men (82%) and women (77%), and much of that was to do with the gender profile of the 65+ age group.

Pattern of usage

The pattern of usage of the net will vary from one country to another, but The Netherlands may be taken as an example of a country with high internet penetration (93% according to Miniwatts). During the month of June 2014 there were 13.6 million unique visitors to the internet, as reported by comScore MMX in their *Dutch Digital Market Overview June 2014* [74]. On an average day there are 10.3 million visitors. The average visitor used the internet on 23 days during June, and made an average of 3.2 visits each usage day. Across the month, the average visitor spent 30 hours on the net, looking at 3,000 pages. This works out at 100 pages per hour, or 1.7 pages per minute, which means an average of 35 seconds per page.

Much of this internet exposure was to social media websites. Some was to websites from publishers – most notably the Sanoma Group who ranked fourth on comScore's list of the top websites (Figure 50). Several print, television and/or radio-based groups appear in the top 15 web properties.

Focusing on magazine websites, the 2013 Indonesian survey by the Femina Group, *Usage of Multiple Platforms Of A Magazine Brand* [5], asked female visitors to the group's dozen or more websites which areas of interest they had searched for. The top six were news (74% had looked for news), fashion (45%), beauty (42%), cooking (41%) health (32%) and travel (30%).

FIG 50. **TOP 15 WEB PROPERTIES IN THE NETHERLANDS**

Millions of total unique visitors	
Google sites	12.8
Microsoft sites	10.3
Facebook	9.3
Sanoma Group	7.5
eBay	6.0
Publieke Omroep	5.4
Telegraaf Media Groep	5.3
Wikimedia Foundation sites	5.2
Ahold sites	4.8
RTL Group sites	4.5
ING Group	4.4
De Persgroep	4.2
Rabobank Group	4.0
Yahoo sites	3.8
LinkedIn	3.7

Source: Dutch Digital Market Overview June 2014, comScore, The Netherlands.

The Femina survey asked about attitudes to the magazine websites:

» 83% agreed ('Strongly agree' and 'agree') that "Searching for various topics is easy in the magazine website"
» 80% agreed that "A magazine website gives me easy access to content I would like to read"

When a magazine's print and web offers were compared, there were mixed views. 46% of the website visitors agreed that "The content of a magazine website is as attractive as that of a print magazine", but a small majority did not agree or were undecided. 36% agreed that "I prefer to read a print magazine rather than a magazine website", but almost two-thirds were either undecided or did not agree.

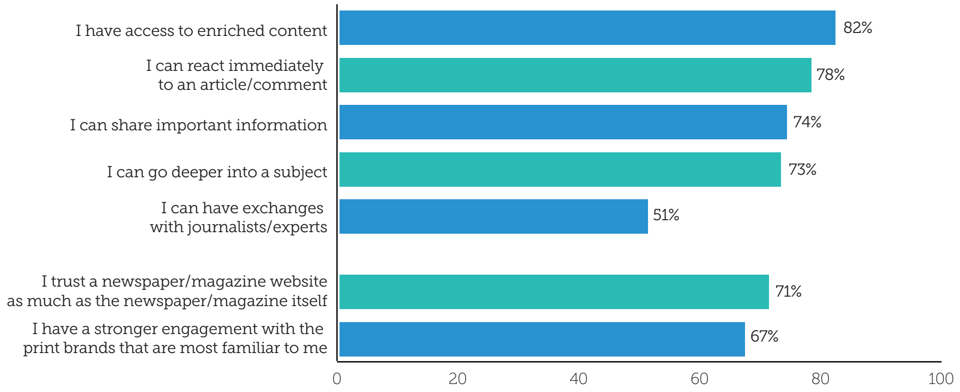
Print and websites complementary

The complementarity between a magazine brand's print and website offerings was underlined in detail by a survey in France, *L'Efficacite Print + Web*, published by SPM La Presse Magazine [75]. The survey, conducted in 2011 using an online sample of more than 4,600 magazine readers, studied three categories of publication: news, women's and cars.

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

FIG 51. **PUBLISHERS' WEBSITES: RICHNESS, INTERACTIVITY & TRUST**

% agreeing with statements



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

internet site or its mobile application".

Consumers liked the enriched content and depth of publishers' websites, and the ability to interact with them – as Figure 51 shows.

The chart also confirms that the innate values of print brands are transmitted to their digital extensions. Publishers' websites are more involving than the websites of pure players. Print publishers are ideally placed to operate successful and appealing websites.

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

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

The importance of trusted brands online

In digital media, as in printed magazines and other long-established media, trust is a key element. In the UK the *New Rules of Engagement* study published by the Association of Online Publishers (AOP) in 2010 [76] investigated which dimensions of website engagement had the strongest relationship with consumers' behaviour towards advertising. They found that the dominant dimension was trust. In this respect, original content sites were seen to perform well ahead of portals and social networking sites. AOP commissioned a follow-up study called *The Value of Trust*, conducted by comScore and published in 2012 [77]. It compared original content websites, portals and social networks, and concluded (Figure 52) that:

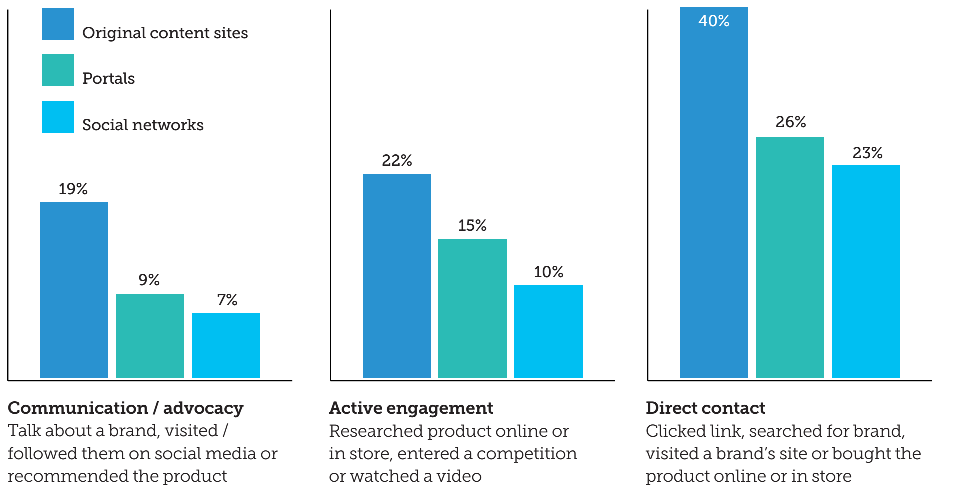
» The higher levels of trust in original content sites rubs off to create a higher degree of affinity and trust in the advertisers who appear in those environments

» Advertising on original content sites is measurably more effective than portals and social media in delivering on all stages of the purchase cycle from awareness to purchase

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

FIG 52. **THREE ONLINE PUBLISHING ENVIRONMENTS**

Actions taken after seeing display ads



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

Examples of the 'trust effect' for online display advertising include websites from magazine media, where the consumer trust invested in those magazine brands rubs off onto the advertisers.

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

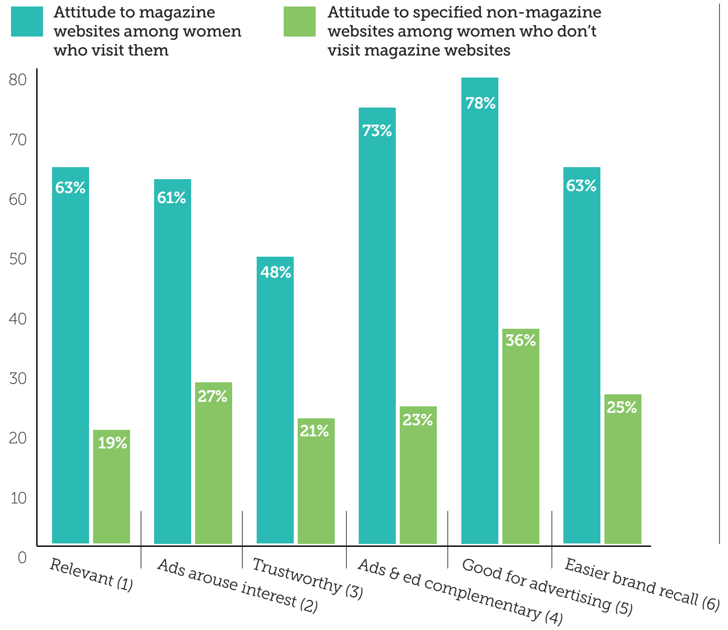
Post-campaign evaluation metrics should also reflect the level of trust in environment and brand, which we suggest is an additional valid metric for measuring campaign success and is currently largely ignored."

The French survey *L'Efficacite Print + Web* showed how the trust embedded in print brands is carried across to their websites. 71% of respondents agreed that "I feel just as much trust consulting a newspaper/magazine website as when I read the newspaper or magazine itself".

Other statements highly relevant to advertisements on publishers' websites included "I can share important information with those close to me" (74% agreed) and "I can go further and deeper into a subject" (73% agreed).

FIG 53. **ATTITUDES TO MAGAZINE AND OTHER WEBSITES AMONG WOMEN INTERNET USERS**

% who agree or agree strongly



FULL STATEMENTS:

For those who visit magazine websites:
(1) "Advertising on magazine websites is relevant to people like me"
(2) "Advertising on magazine websites is usually more interesting to me than advertising on other kinds of websites"
(3) "Advertising on magazine websites is more trustworthy to me than advertising on other websites"
(4) "The content and the advertising on magazine websites are complementary"
(5) "Magazine websites are a good place for brands to advertise"
(6) "I find that brands advertised on magazine websites are easier to remember"

For those who do not visit magazine websites, the phrase 'magazine websites' was replaced by the kind of website they said they were visiting (e.g. movie sites).

Base: Women who use the internet, divided into those who do not visit magazine websites and those who do.
Source: Atenea Digital, ARI/Hearst/RBA/G+J, Spain, 2013

Attitudes to the advertising on magazine publishers' websites versus other websites

The *Atenea Digital* project in Spain [78], commissioned by a consortium of publishers (Hearst, RBA, & G+J Motor Press, with the Associacion de Revistas de Informacion: ARI), found a distinct difference in image among users between magazine publishers' websites and websites from other sources, in terms of the advertising they carry.

Women who use the internet were shown a list of types of website (magazine websites, movie websites, TV websites, etc) and asked which they visited. Those who visited magazine websites were asked whether they agreed or disagreed with six statements about the advertising on magazine websites. Those who didn't visit magazine websites were asked about their agreement with the same statements but about one of the types of website they did visit.

Figure 53 shows that, among women who visited magazine websites (the dark green bars), high proportions thought the advertising on them is relevant to them, is (therefore) usually more interesting than advertising on other websites, and is more trustworthy than advertising on other types of website. The results echo the same well-established characteristics of print magazines: chosen by readers, and therefore highly relevant and interesting, and also trustworthy. Again echoing the print titles, many visitors to magazine websites thought that the editorial content and the advertising were complementary.

It makes sense, therefore, that a high proportion of magazine website visitors thought these websites are a good place for brands to advertise, and that brands advertised there tend to be easier to remember.

The other striking thing about Figure 53 is how much more positive were the attitudes to magazine websites among their visitors (the dark green bars) than the attitudes to other types of website among visitors to those (the light green bars). For example, the score for relevance was three times greater for magazine websites (among its visitors) than for other types of website (among their visitors). For all of the other attitude statements the scores were also between twice and three times as great for magazine websites as for the other types of website.

The results among men were broadly similar to those for women.

It is evident that magazine websites are being perceived in ways which are similar to print magazines, in terms of relevance, interest, trust and so on, and that these attitudes carry over to the advertising, to the benefit of the advertisers. The positive values so strongly associated with the print titles are rubbing off onto their associated websites.

Ad effectiveness of magazine and non-magazine websites

Research supports the natural expectation that a magazine brands' print and web properties will work well together for an advertiser, each making the other platform work even better than when used on its own – the multiplier effect. Moreover, linked magazine-branded print and web properties may be expected to work better together than print combined with non-magazine websites, because of the values of the print title rubbing off onto its companion website.

This has been confirmed by *Atenea Digital*, which is primarily a campaign tracking system. Within the defined target audience, two matched samples are compared, differing only in that one sample has been exposed to the relevant websites and/or magazines, and the other has not.

One 2013 case study was for Pantene haircare products, which advertised on television, print magazines, magazine websites, and non-magazine websites. The study segmented the total audience into groups according to their exposure or non-exposure to the various combinations of websites and print magazines. In other respects the compared groups were carefully matched.

The data presented here compare visitors to *magazine* websites carrying the advertising (but not visiting the non-magazine websites) and visitors to *non-magazine* websites carrying the advertising (but not visiting the magazine websites). All had been exposed to the TV campaign and the print magazines carrying the advertising.

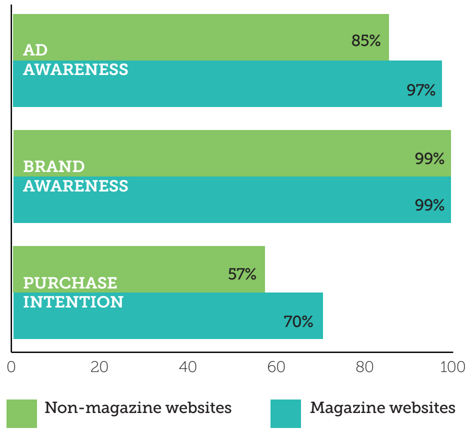
In Figure 54 advertising awareness and purchase intention were higher among the magazine websites-only group than those who had only seen the non-magazine websites. Brand awareness was extremely high for both groups at 99%.

In Figure 55, based on women who had read the print magazines carrying the ads, recall of the online advertisement was much higher (more than double) among those who had seen it on magazine websites than among those who had seen it on non-magazine websites. Similarly, brand recognition was much higher (again more than double) when seen on magazine websites. Since both groups had seen the print advertising, the higher response to the online ad among those seeing it on the magazine website indicates a rub-off effect.

Figure 56 presents the picture on word of

FIG 54. **PANTENE, SPAIN: AD AWARENESS & PURCHASE INTENT**

Non-magazine and magazine websites compared, among readers of print magazines

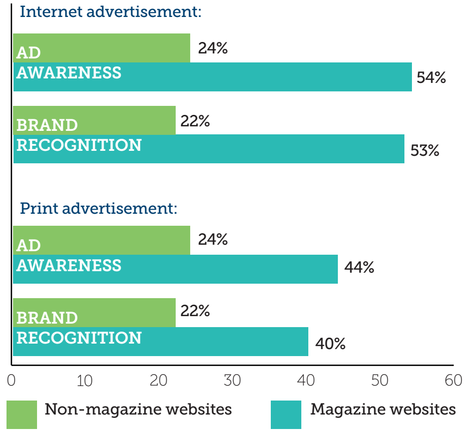


Base: Exposed to TV and print magazines in campaign; visiting either magazine websites or non-magazine websites in campaign but not both.
Source: Atenea Digital, ARI/Hearst/RBA/G+J, Spain, 2013

mouth communication. Readers of the print magazines were classified into Champions ("I talk to many people and could give a large amount of information and I'm very / quite likely to

FIG 55. **PANTENE, SPAIN: AD AWARENESS & BRAND RECOGNITION**

Non-magazine and magazine websites compared, among readers of print magazines



Base: Exposed to TV and print magazines in campaign; visiting either magazine websites or non-magazine websites in campaign but not both.
Source: Atenea Digital, ARI/Hearst/RBA/G+J, Spain, 2013

convince others"), Other Transmitters (with WOM potential but less than Champions) and Receivers ("I don't talk to many people and couldn't give a large amount of information about brands and products"). Print magazine readers who visited the associated magazine websites contained a higher proportion of Champions, and fewer Receivers, than those who only visited the non-magazine websites.

Ads on magazine websites drive sales

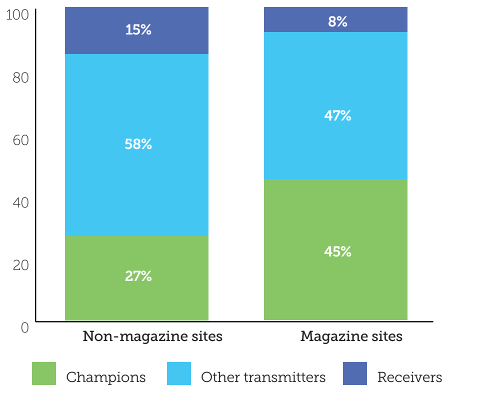
Progressing from attitudes, ad recall, brand awareness, word of mouth, purchase intent and other intermediate measures, brings us to what is normally the final stage – sales.

In a ground-breaking Meredith Corporation project, advertising on magazine websites was found to have lifted sales of ten products by an average of 8%. For all ten brands there was a sales increase attributable to the magazine website advertising.

These results come from the *Meredith Sales Guarantee* in the USA, based on a research methodology which quantified the impact of magazine media advertising investment on actual brand sales [79]. The advertising appeared exclusively in Meredith Corporation's portfolio of magazine media. Nielsen's HomeScan consumer panel was used to examine week by week sales of each product before, during and after the campaign periods. Households were classified into those which had been exposed to the magazine website advertising and those which

FIG 56. **PANTENE, SPAIN: WORD OF MOUTH PROFILE**

Non-magazine and magazine website visitors compared – among readers of print magazines

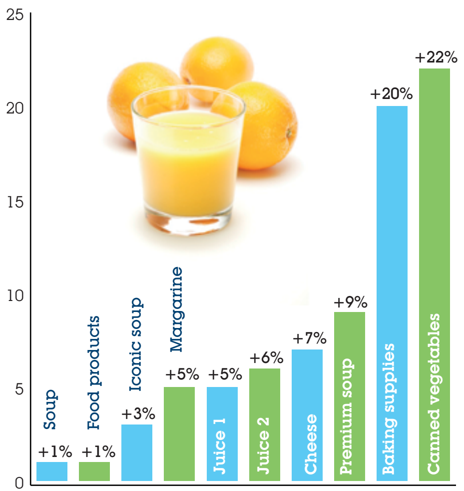


Base: Exposed to TV and print magazines in campaign; visiting either magazine websites or non-magazine websites in campaign but not both.
Source: Atenea Digital, ARI/Hearst/RBA/G+J, Spain, 2013

had not (the matched control group). Further details of the methodology are given in Chapter 9.

The ten digital campaigns, averaging six months duration, averaged a sales uplift of 8% - not very different from the print-only campaigns'

FIG 57. **DIGITAL-ONLY CAMPAIGNS: SALES LIFTS PER CAMPAIGN**



Source: Meredith Executive Summary June 2014, Meredith/ Nielsen, USA, 2014

average uplift of 10% described in Chapter 9.

All of the ten digital campaigns led to sales increases, ranging from 1% to 22% (Figure 57). All campaigns were in the food category, but with considerable variation as to product type.

The average ROI of the ten digital campaigns was $5.31 per $1 advertising investment.

Emotional responses to a magazine brand straddle platforms

Bauer 's UK study *Heat – A Journey Into Neuroscience*, published in 2013 [79a], was an imaginative way of demonstrating that the values built around a brand in consumers' minds through one platform (say, print magazine) carry across to the brand's other platforms. The investigation used neuroscience to study the emotional responses to Bauer's weekly magazine brand Heat.

It found not only that the Heat brand could generate a strong emotional response, but also that among those connected to the brand across multiple platforms the emotional response was even stronger.

Research agency Neuro-insight recruited 180 consumers and measured brain responses using 'steady state topography' (SST) which involves consumers wearing a brain-scanning helmet on their head. SST can measure a number of emotions as a result of electrical activity in the brain, namely engagement, long term memory encoding, desirability, emotional intensity, and visual attention.

Consumers were exposed to the Heat brand

[5] PUBLISHERS' WEBSITES

across its four core platforms: printed magazine, online, radio, and TV. Consumers were exposed to editorial content, and also advertising for a number of products, each appearing on multiple Heat platforms. There was also a control group, which involved exposing consumers to the same platforms but with a different brand (of comparable size and profile) advertised on each platform. The study matched the commercial messages respondents were exposed to across Heat and the control cell.

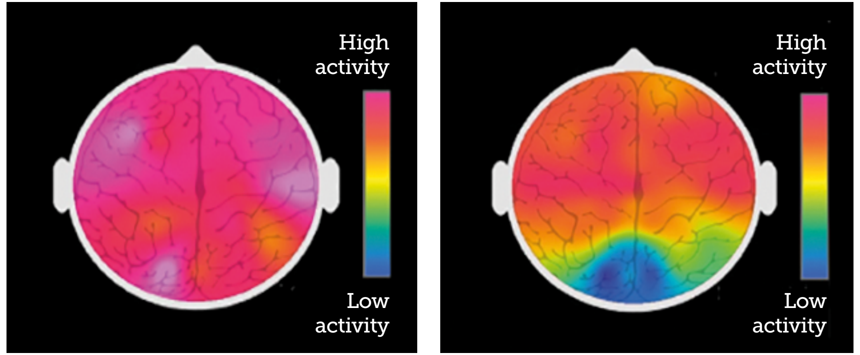
The Heat brand elicited a strong and positive emotional state, and this rubbed off onto the advertising displayed in the context of the brand.

Responses to advertising messages shown across platforms linked consistently by the Heat brand were stronger than advertising messages without that link. For example, seeing an ad in the print magazine primed and boosted responses to the advertiser's commercial messages on Heat's radio and online properties.

Figure 58 shows that when an advertisement is seen in *Heat* magazine, and is then seen online, the response is stronger when it's seen on Heat's website heatworld.com than on an unrelated website. The brain scan when viewing the ad on heatworld.com has the hot colours of high brain activity, whereas when the ad is viewed on another website the scan is much cooler, with

FIG 58. **CONSISTENT BRANDED PLATFORMS IMPROVE AD RESPONSE**

Response to online advertising after seeing ad in *Heat* magazine



Seen on Heat website | **Seen on another website**

Note: measurements taken 15 seconds into exposure to online ad
Source: Heat - A Journey Into Neuroscience, Bauer Media, UK, 2013.

predominantly medium and low brain activity.

As well as being a testament to the power that a magazine brand may exert, it's an example of a cross-platform multiplier effect among connected consumers.

Native advertising

What in print magazine terms is called branded content or advertorials has become widely known in an internet context as 'native advertising'. Another term for it is sponsored content. It is advertising content presented in the same style as the surrounding editorial content. The rules that apply to successful branded content in print should apply to internet native advertising too. It should:

» be relevant to the consumer
» offer something additional with a clear benefit
» equal the editorial content in its quality and style
» be true to the values of both the publisher brand and the advertiser brand
» be clearly identified as paid-for material and not masquerade as independent editorial

If these rules are followed, internet users can be comfortable with brand messaging which is transparent as to its nature.

What is special about using branded content online, compared with in print, is that the digital platforms offer so many more opportunities for its effective use within the conversations and surfing that go on. These include in-feed commercial messages, paid search, promoted listings, in-ad with native element units, and recommendation widgets. Native advertising shares with branded content in print the great attribute of accurate targeting of relevant audiences.

The importance to the consumer of relevance of branded content was highlighted by *Getting Sponsored Content Right: The Consumer View* from the Internet Advertising Bureau and Edelman Berland in the USA, in July 2014 [80]. 5,000 consumers who visited entertainment, news or business websites (but excluding social media) were shown real-life examples of in-feed sponsored messages.

» 90% of consumers said relevance was important in drawing interest to the sponsored item. This means relevance to the consumer and the website's editorial content
» 82% said it was important that the advertiser brand should be an authority on the topic
» 81% said it was important that the brand was one they knew and trusted

Other findings included:

» 86% of consumers felt that online advertising is necessary in order for them to receive free content online
» The majority – around two-thirds – were aware of having previously seen and recognised sponsored content
» 60% said they were more open to native advertising which tells a story rather than only selling a product
» 38% agreed that sponsored content added value to the experience of using the website

For more on native advertising in magazines, there is an excellent chapter in FIPP's report *Innovations In Magazine Media: 2014 World Report* [40]. ❤

"Make sure it's relevant to me. If it reflects the types of articles I am reading, then I'm more likely to seek out those advertisers."

"When it is a brand that has a good reputation and is putting information together that they can back up, then it's more likely to be taken seriously and viewed as trustworthy."

Getting Sponsored Content Right: The Consumer View, IAB/EB, USA

6

SOCIAL MEDIA

- Social media and magazine brands are both about communities. Magazines sit at the heart of many communities, and are a natural route through which marketers' messages can be channelled.
- Magazine readers are enthusiastic users of social media.
- Compared with the adult population, magazine readers are more likely to follow their favourite brands, participate in the conversations, make recommendations, and act on recommendations.
- They are 'Conversation Catalysts'.
- Digital conversations are stimulated to a high degree by premium content websites such as magazine websites.

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[6] SOCIAL MEDIA

SOCIAL MEDIA is about communities. Magazine brands are also about communities – often positioned at the very centre of them. Consequently magazine media, through all their platforms, are in a powerful position to assist marketers to interact with relevant communities, wrapped in the context of the positive values associated with magazine brands.

Partnering with magazine publishers can be an effective route through which marketers can achieve their social networking goals: increasing brand awareness and product knowledge, sharing early information about new products, creating promotional campaigns, raising awareness of issues, receiving feedback, building relationships, and generally interacting with customers.

Magazine readers' use of social media

Magazine readers are enthusiastic users of social media. Several examples have been given in earlier chapters, from digital edition readers in Brazil going to social media for more information on products seen in the digital edition; and using social media to recommend to others products seen in the digital edition; to social media as an integral part of the array of platforms used regularly in magazine-reading connected consumers' lives in the UK.

Many more examples might be given. For instance, the use of social networking is very high in Indonesia, especially among magazine readers. The Femina Group's 2013 survey *Usage of Multiple Platforms Of A Magazine Brand* [5] asked female visitors to the group's dozen or more websites which digital activities they were engaged in. 98% were using social media, just ahead of 94% checking emails. The next highest ranking activities were seeking fashion and beauty trend information (77%), health information (73%) and jobs (65%).

While using social media, 72% used a mobile phone, 69% used a laptop computer, 54% used a desktop computer, and 19% used a tablet.

Social media accounts for around 90% of all 'gross audience contacts' across all Femina platforms

Clearly many were using different devices in different circumstances.

The nature of social communities

Underlying these social activities is the notion of communities. In just a few years the explosive growth in ownership of smartphones, tablets and other devices has led to massive behavioural changes in the way people interact with each other and with brands. The constant flow of information in multiple directions has speeded up our lives, boosted our knowledge, influenced our beliefs, and affected our decision-making – including decisions about purchases.

It has also affected our circles of friends, physical and virtual. Our social lives revolve increasingly around extended or new communities of interest – highly involved, connected and passionate groups of people, frequently in circumstances where most members never meet other members in the flesh.

Members of communities not only share a strong attachment and commitment to the subject area. They also have a sense of belonging, relating to others in the group; they feel they can influence others if they wish to contribute, and will be influenced themselves; they expect to benefit from the sharing within the group; and they have an emotional attachment to it. This attachment to the group makes them value the opinions of other members – and that includes members' knowledge and experiences of products and services.

FIG 59. **TYPES OF COMMUNITIES**

Local / Geographical	→	Where I live and play
Professional / Educational	→	My career and learning
Interest / Passion	→	The things I love
Problem oriented	→	The things that challenge me / my family
Life stage / event	→	The things that have been thrust on me
Public / Organisational	→	My views, concerns and causes
Brands	→	Products that represent what I am / want to be
Personal connections	→	My friends / family / co-workers who matter

Source: Community Explorer, MediaVest, USA, 2013

A major study of social communities called *Community Explorer* was conducted by MediaVest in the USA, reported in 2013 [81]. It classified communities into eight main types (Figure 59).

The four largest individual communities it identified were those centred around TV viewing/shows, cooking at home, music, and personal travel. The four smallest were US soccer fans, new parents, parents with special needs children, and participating in extreme sports. (Of course there are many thousands if not millions of much smaller communities of interest but they are too small for this population survey to have picked up.)

Across all the measured communities, the average member communicated personally with 15 other members; communicated frequently, with 17% doing it on a daily basis and 35% weekly; spent 4.5 hours a week engaged in the community topic; and made a point of staying up to date on the topic.

Community Explorer devised a simple means of estimating a community's ability to amplify brand messages – it's 'scale'. The community size (for example, 37 million members) multiplied by the average number of contacts each community member regularly makes (for example, 15 contacts) equals the community scale (in this instance, 555 million potential earned impressions). Communities can vary wildly in not only size but also amplification potential.

Among the conduits for community participation are the media, and it is possible to identify the media which most closely align with a target community, in being used as a source for staying up to date on the topic and exchanging information, and inspiring further conversation.

Talking with friends and family in person or on the telephone was the leading source (most conversation - 90% or more - does not take place through social media at all). Printed magazines showed noteworthy strength across a large proportion of communities, including celebrity enthusiasts, home design/decoration, motoring, fashion, healthy eating, and many others. Indeed in many communities magazines were the Number One resource, standing right at the centre of the community. Social media channels obviously performed very well, with Facebook and Twitter in the lead within this category.

The published report on *Community Explorer* concluded "By knowing the strength and nature of community bonds (how they connect), community motivations (why they connect), and their sources of influence and inspiration, we are able to craft content and marketing strategies that are most inspiring to our target communities. In today's social world, where peer influence is central in the formation of brand beliefs, evaluations and ultimately purchase decisions, community is at the core of social amplification in its broadest sense."

Communities do not welcome hard selling within the community, but if a marketer is able to feed information into the group in an acceptable way – for example as an interesting story or news item – it can be very influential. Magazine media, as community 'insiders', are among the channels through which marketers may be able to do this, connecting consumers to the brand in a powerful way. To be effective, this form of 'native advertising' must follow the rules described in the previous chapter. Success depends on the degree to which a brand blends in with the conversations that are going on, and this calls for a more subtle softer drip-feed approach compared with conventional advertising. Social media is not about a hard sell, it is about building relationships.

> Magazine media, as community 'insiders', are among the channels through which marketers may connect consumers to the brand in a powerful way...

Social networking magazine readers

In 2013 in the USA Experian Marketing Services examined magazine readers' use of social media, by analysing a number of *Simmons* surveys [82]: Simmons National Consumer Survey, Simmons Connect, Simmons Multimedia Engagement Survey, Simmons New Media Study, and Hitwise. The analysis covered six vertical market segments: automotive, entertainment, epicurean, health & fitness, home, and travel. Within each segment, magazine readers' use of Facebook, Twitter and Pinterest was studied.

In all six vertical segments, more than half of magazine readers were users of social media. They were more likely than adults in general to follow their favourite brands on social networking sites. Heavy magazine readers were even more likely to do so.

The motivations for following a brand show the benefits the readers were anticipating. Among heavy magazine readers, 67% said they friend brands to get coupons and discounts; 42% to get product information including previews; 13% to get better customer service. These proportions varied by market segment. For instance, travel magazine readers popularly followed a brand to get sneak previews of products, and early warning of reduced prices. Automotive magazine readers were more likely to follow brands to get previews of new models, notice of discounts, and other product information. Readers of magazines in the entertainment vertical followed brands for product information such as early news of forthcoming programmes.

Not surprisingly, in all six verticals the magazine readers were much more likely to friend magazines than were adults in general. Receiving content from their favourite magazines via their news feed was a popular choice.

Magazine readers were more open than the average adult to being influenced by the opinions, reviews and ratings of others in their social community. They also gave higher agreement to the statement that "I am more likely to purchase products I see used or recommended by friends on social networking websites". In addition they were active in telling others about companies and products they like.

Experian found that across all six verticals the smartphone was the top device for social media, followed by the home PC. Tablets were used by less than half of networkers for social networking. Around half magazine-reading social networkers used more than one device for the purpose.

> Magazine readers were more likely than adults in general to follow their favourite brands on social networking sites. Heavy magazine readers were even more likely to do so...

Facebook was the most widely used social network, by a substantial margin, and on all devices, followed by Twitter. Pinterest's relative strength was for topics where visual representation was particularly important, such as home décor and cookery. Pinterest was the only one of the three social networks where tablets were used more than either smartphones or PCs.

Social networks also drove traffic to magazine websites. Facebook was the leading driver, except that for home magazines it was Pinterest which accounted for the largest share of traffic. Twitter generated less traffic to magazine websites than either of the other two.

To summarise key points from the Experian analysis: magazine readers use social media widely, and compared with the adult population they were more likely to follow their favourite brands on social media, were open to influence from others in their community, and to take action as a result of recommendations. They also took an active part in contributing to the conversations. Indeed, as the next section describes, they are Conversation Catalysts.

Conversation Catalysts

In the UK a 2013 analysis of the IPA's *TouchPoints* survey [83] has confirmed that magazine readers are Conversation Catalysts. TouchPoints is a large database in which all the UK's industry media currencies are integrated onto a hub survey, for cross-channel analyses.

Conversation Catalysts are defined as people with a large social network who regularly give recommendations in multiple product categories. This is especially true of online magazine readers.

The audiences of online and offline media were compared with all adults in terms of the proportion of the audience who qualified as Conversation Catalysts. Indexing the all-adult score as 100, online users of magazine content far outscored all other online media, and indeed all offline media. Figure 60 shows the indices for the online media.

Data among heavy users of the offline media showed that heavy cinemagoers had the highest index, associated with their age profile, while heavy magazine readers registered an index of 116. Heavy TV viewers recorded an index below that of all adults' 100, viz 80.

The IPA's analysis of *TouchPoints* commented "In a communication landscape where we are rapidly moving from an interruption to an engagement model, mood is becoming a key consideration in media planning".

The survey's e-diary asked respondents to record their mood during each half-hour. Cross-analysing mood against media usage revealed that "heavy and medium newspaper and magazine users tend to be the happiest people"! Bad mood is dominated by heavy and medium mobile phone users. Overall, the analysis indicated that "people are at their happiest when they have actively *chosen* to undertake an activity, such as reading a publication rather than consuming media using electronic devices." Magazines are, above all, the medium where users exercise choice most comprehensively.

Using social media to engage in new ways

Each social media platform is an opportunity for publishers and marketers to communicate with people in a different way – and in ways far beyond

Scan page to watch Social Media, Canada Video

what used to be possible when ‘magazines’ were only print products.

To illustrate, two publishers in Canada – St Joseph Media and Cottage Life Media – have described in a video on YouTube how they use three of the leading platforms. The video, released in 2012, is called *Magazines use social media to engage in new ways* [84]. Here is a brief synopsis.

Facebook (FB):

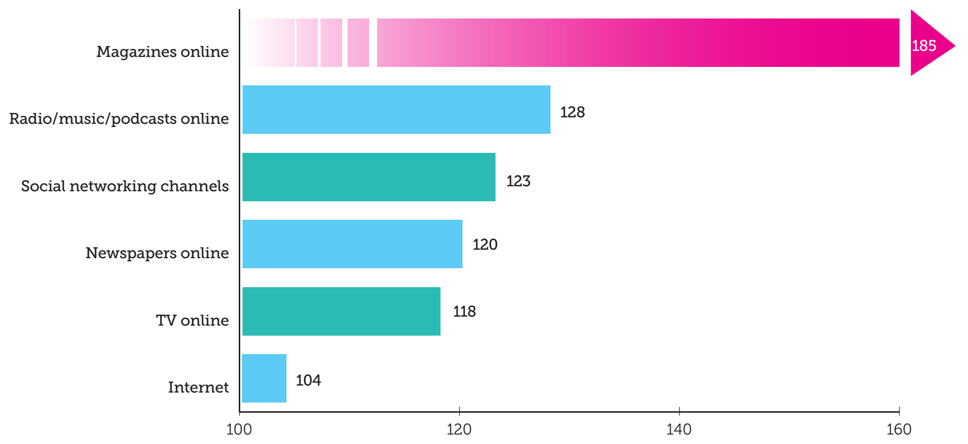
Experience shows that consumers click on videos and photographs more than they do on links, which helps indicate the kind of material to put on FB. For example, people enjoy taking part in competitions. In running an ad campaign, a publisher can design a competition where it is necessary to Like the client’s web page in order to enter. As another example, a publisher might post some of its own recipes, tips or other core information on its FB pages, and link it back to the clients’ website because the client also has relevant information on that subject matter.

Twitter:

Twitter is very different from FB; in effect it is a real-time news feed. It’s a way of being able to receive information that one wants

FIG 60. **CONVERSATION CATALYSTS: USERS OF ONLINE MEDIA**

Index: All adults = 100



Index shows proportion of users of medium who qualify as Conversation Catalysts, indexed on proportion for All Adults
Source: TouchPoints 4, IPA, UK, 2013

on the topics that one wants, as quickly as possible. There is a social element to Twitter but it is not primarily a social pure-play. It’s more a broadcasting information vehicle. Advertising on Twitter is more difficult than on FB, because advertising in the middle of a news feed is off-putting to the readers and unproductive to the publishers. Twitter is however well suited to promotions in more involving forms, such as competitions.

Pinterest:

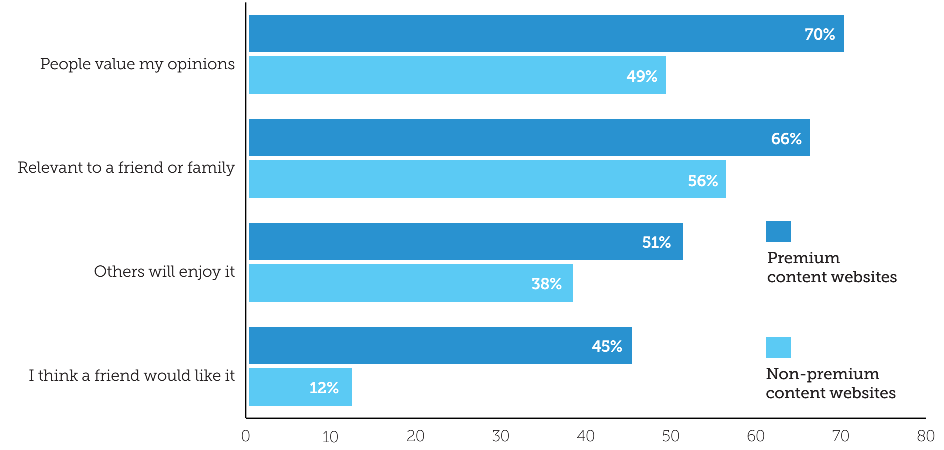
Pinterest has been hugely successful for posting pictures related to the magazine brand’s content – for example, house styles for a shelter (house and garden) magazine brand. It shows consumers what the ethos of the magazine brand is, and those people who share that ethos can be drawn more closely to the brand. It is a way for people to develop a greater understanding of and connection with the brand. Pinterest can serve as an archive, a reference source, so that consumers can see the images that sum up the publisher’s brand, and encourage them to follow the brand. In addition, the ability to see what content is of most interest to consumers can feed back into the content in the printed magazine, or other platforms. Links can be established with advertisers’ information..

The two Canadian publishers find that their social media platforms are not only valuable for running native advertising but are also a top driver of traffic to their websites, where visitors become high-value (because relevant) traffic for the website advertisers. It is also a route to generate new subscribers, whether to the print or digital editions or both.

Almost every print campaign run in St Joseph Media or Cottage Life Media titles now has a social media tie-in.

FIG 61. **WHY WEBSITE VISITORS SHARE CONTENT**

% agreeing with each statement



Source: Digital Conversations, IPC Media, UK, 2014

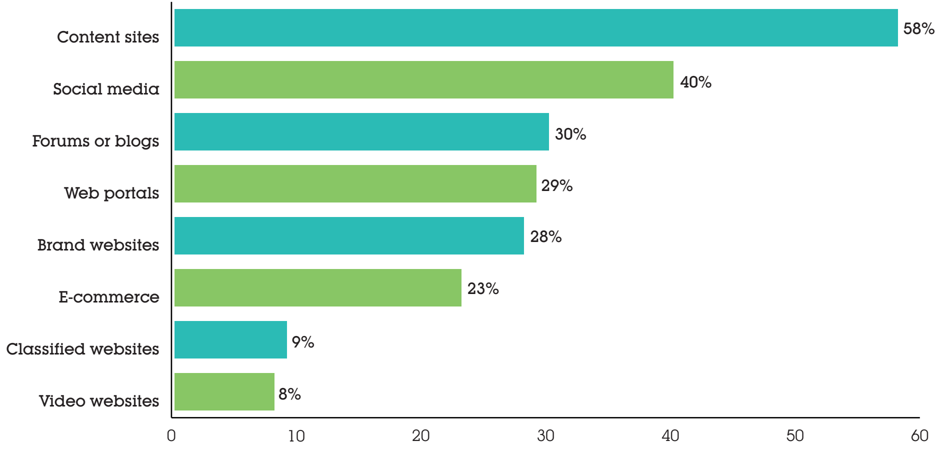
Premium content websites stimulate digital conversations

Consumers interested in niche topics are passionate about their specific interests, and when they look for websites serving those interests they find that the most stimulating websites are the ‘premium content’ sites, those that provide original content and have great authority on the subject – such as magazine publishers’ sites. Premium content websites induce markedly more electronic sharing than non-premium content sites.

IPC Media in the UK released in July 2014 a study called *Digital Conversations* [85] which

FIG 62. **WEBSITES USED FOR BRAND CONVERSATIONS**

'% of online brand conversations which take place on this medium



Source: Brand Buzz Survey, OPPA, Belgium, 2012

compared users of IPC's own websites with users of non-premium websites who were interested in the same topics. Users of the premium entertainment sites were 77% more likely than non-premium site users to recommend to others music, film and entertainment content. For fashion and beauty websites the figure was 62% more likely, and for IPC's websites in general it was 49%.

The reasons consumers shared were to do with beliefs that their opinions were valued, and it would be relevant, interesting and enjoyable to others. Figure 61 compares users of premium content and non-premium content websites. The way that consumers share content from websites is not primarily through social networking channels however. Much of it is through the highly personal and targeted medium of email.

For example, in an average month there were 18,908 incidents of visitors to the *Marie Claire* website sharing content with friends by email, compared with 1,747 incidents of sharing via Facebook or Twitter. Similarly on the music-oriented website NME.com, a typical month yields 44,850 emailed shares compared with 5,674 shares via Facebook or Twitter.

Sharing by email is highly personal and involving. It presents a great opportunity to advertisers if they can construct suitable partnerships with publishers, on the publishers' websites, leading to premium website visitors becoming brand advocates among their peers.

A Belgian survey also compared premium content websites with social media as generators of online conversations. The Online Professional Publishers Association (OPPA) presented their *Brand Buzz Survey* among the Belgian online adult population in 2012 [86].

It established that 9 out of 10 online visitors talk about brands regularly. These conversations are prompted by (in order of importance) purchases or purchase experience; an advertisement; online content; and other sources. When a conversation is inspired by an advertisement, the principal contributor is print magazines/newspapers (36%), followed at a distance by TV (19%), content websites (17%), and email (12%). Other sources, including social media, account for less than 8% each.

However most of the conversations about brands (87%) are face to face. 44% of conversations are over the telephone. Online conversations are in a distinct minority (35%). Among that 35% of brand conversations which take place online one location is prominent: content websites, used in 58% of the conversations.

Social media rank second, used in 40% of conversations (Figure 62). Commenting on the leading position of content websites, OPPA said "Sites where content is written by journalists create reasons for consumers to talk about brands and create buzz".

What is said in these online conversations? Among regular users of content sites, 90% talk about new products before or after purchase; 89% initiate or contribute to conversations about brands; and 51% recommend brands often or very often. These conversations cover all stages of the purchase decision-making process.

What are the motivations? 35% of conversations aim to get informed or to inform others. 29% aim to convince others. 11% aim to get advice. And 25% are neutral or there are other purposes.

Included among the content sites' visitors are opinion leaders always willing to give advice and share brand experiences – brand ambassadors.

OPPA summed up by saying that content sites create reasons for consumers to talk about brands, which allows marketers to reach highly engaged targets through advertising in a premium environment. ❤

Sharing by email is highly personal and involving. It presents a great opportunity to advertisers if they can construct suitable partnerships with publishers

7

COMPARING MAGAZINES AND OTHER MEDIA

- All media have strengths, and a mix of media produces the most complete communication.
- Consumers develop personal relationships with magazine brands. Consequently magazines' strengths compared with other media are to do with engagement, inspiration, trust and practical use.
- Other strong assets include low multi-tasking, and high primary attention.
- Magazine advertising is not regarded as interruptive or unwelcome. It induces action and purchase.

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[7] COMPARING MAGAZINES AND OTHER MEDIA

TO SKETCH A VISION of the natural role of magazine media within a multi-channel advertising campaign, a good starting point is the Media Experience Survey 2012 in The Netherlands [64]. Conducted by TNS NIPO, it was published by the NUV Dutch Magazines Association in order to assist strategists' qualitative judgements about media. It examined how consumers experience and perceive different forms of media, Each medium was assessed among its own users against 11 factors. Figure 63 shows the ranking of each medium against each factor.

Among the five media, magazines were ranked first on four factors. Three of these - identification (involvement, self-recognition), stimulation (enthusiasm, fascination), and innovation (surprises me, keeps me informed of trends) – reflect magazines' ability to engage and inspire. The fourth factor was practical use (tips, motivated to do something), and it was accompanied by a second-ranking on information (something new, useful, credible). The combination of inspiration together with assistance to put the inspiration into effect (i.e. 'practical use') is a very positive one for advertisers.

Added to this, magazines rank high on enjoyment and a pleasurable way of occupying time. The fact that they demand focused attention and are often read alone explains their low ranking on social interaction. However they do spark a high degree of social interaction as a result of what has been read, as earlier chapters have proved.

Figure 63 also reminds us that all media have their strengths, and consequently it is a mix of several media which produces the most complete communication. Newspapers rank top in terms of topicality, pastime, social factor/conversation – and disturbing emotions (the terrible news we hear every day from around the world; television ranked second on this factor). Television's best rankings (in second place) were in terms of stimulation, identification and material for conversations. Radio's great strength is enjoyment; otherwise it ranked mid-to-bottom on all the other factors. The internet was perceived by its users as the best of these five media for social interaction/keeping in contact with others. It also ranks highly for topicality and practical use.

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

Respondents were shown a list of ten attributes of advertising, and asked to say to which media they applied. Figure 64 presents the resultant ranking for the five media.

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

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

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

The 2012 survey was the fourth *Media Experience Survey* in an occasional series going back to the 1990s. Strikingly, the roles and rankings of magazines have not changed materially during this time. The old pre-digital

FIG 63. **CONSUMERS' EXPERIENCE OF FIVE MEDIA: RANKED**

	MAGAZINES	NEWSPAPERS	TELEVISION	RADIO	INTERNET
Identification: recognise yourself in, feel involved	1	3	2	5	4
Stimulation: made enthusiastic, fascination	1	4	2	5	3
Innovation: surprises me, informs me of trends	1	2	5	4	3
Practical use: tips, motivated to do something	1	3	4/5	4/5	2
Information: something new, useful, credible	2	1	4	5	3
Enjoyment: pleasure, relaxation, transformation	2	5	3	1	4
Pastime: filling empty moments	2	1	5	3/4	3/4
Topicality: keeps up to date	3	1	4	5	2
DISTURBING: makes me worried, disturbs me	3/4	1	2	5	3-4
Social interaction: sharing, in contact with others	3/4	2	3/4	5	1
Material for conversations	4	1	2	5	3

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

FIG 64. **CONSUMERS' EXPERIENCE OF ADS IN 5 MEDIA: RANKED**

	MAGAZINES	NEWSPAPERS	TELEVISION	RADIO	INTERNET
POSITIVES:					
Felt involved	1	2	5	3	4
Made me excited	1	2	5	4	3
Original and unique	1	2	3/4	5	3/4
Useful information	1	2	5	4	3
Offered something new	1	3	4/5	2	4/5
Makes me happy	1	4/5	2/3	4/5	2/3
Reliable information	1/2	1/2	5	3	4
Led me to cut out something / to call or visit somewhere / visit website	2	1	3-5	3-5	3-5
NEGATIVES:					
Annoyed me	5	4	1	3	2
I found quite unclear	5	1	4	3	2

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

truths about printed magazines have stood firm during the onslaught of digital media.

Trust in the information and advertising

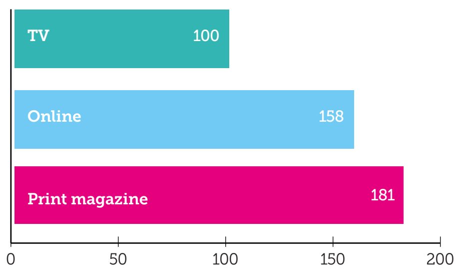
The element of trust, which is such a strength for magazines, has been underlined in many surveys around the world. A recent example is the *Media Connections Study* of 2013 from Magazines Canada [87] conducted by BrandSpark International. Consumers were asked which media "have information I trust". Indexing TV as 100, magazines scored almost twice as heavily, with online in between – Figure 65.

The Canadian survey reinforces the Dutch survey's evidence about magazines' strength concerning information provision and learning things – as Figure 66 illustrates.

Consumers have a much more positive attitude to the advertising in magazines than on websites and, especially, TV. Figure 67 is based on the *Simmons Multimedia Engagement Study* of Fall 2012 in the USA [88]. It shows magazines with much higher indices on positive statements about advertising. Compared with users of the other two media, magazines recorded higher indices on paying attention to the ads, believing they fit in well into the context of the medium, gaining information about products, and leading

FIG 65. **HAS INFORMATION I TRUST**

Indexed on TV=100



Source: Media Connections Study, Magazines Canada, 2013

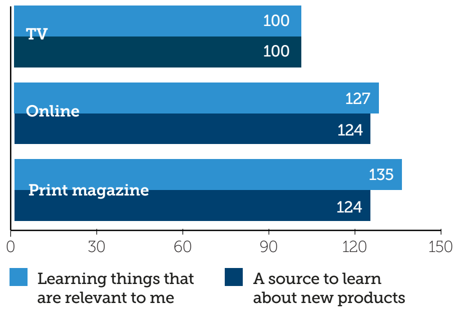
towards purchases. Magazine readers are also more likely to feel inspired in other non-purchasing aspects of their lives, and in trusting the source.

Across all these statements combined, magazines indexed at 131 compared with an almost-par 98 for websites and a poor 84 for TV.

The reason is not hard to see. Magazines are exceptional in that readers consider the advertising as a natural and valuable part of the content, as shown in Chapter 3. It is neither interruptive nor unwelcome.

FIG 66. **LEARNING THINGS**

Indexed on TV=100



Source: Media Connections Study, Magazines Canada, 2013

These thoughts are echoed in research from many other countries. An instance from the other side of the Atlantic is provided by the survey *Consumer attitudes towards advertising in media in Europe*, conducted by the VTT research institute in Finland for the Print Power organisation [89]. The project was conducted among adults across 13 European countries, and asked questions about nine media.

When asked if they trusted the advertising in each of the nine media, European consumers gave the highest scores to the printed media,

FIG 67. **ATTITUDES TO ADS IN MAGAZINES, WEBSITES AND TELEVISION**

Indexed on agreement with statements

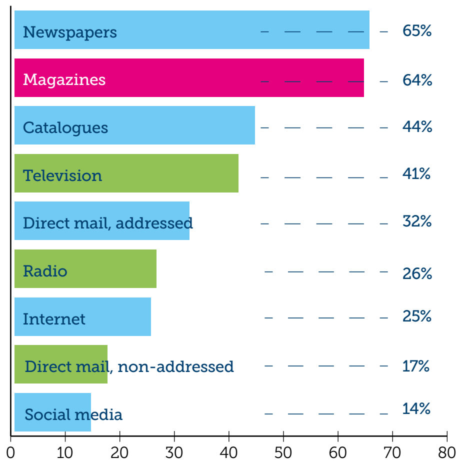
	Magazines	Websites	Television*
ADVERTISEMENTS:			
I pay attention to or notice ads	145	85	90
Ads fit well with the content	139	96	86
It is a way to learn about new products	135	100	77
Gets me to try new things	131	100	81
I get valuable information from the ads	130	96	83
Ads help me make purchase decisions	130	100	85
I am more likely to buy products in ads	125	95	85
Inspires me to buy things	122	109	78
INSPIRATION AND TRUST:			
Inspires me in my own life	135	96	88
I trust it to tell the truth	113	107	84

**Ad-supported TV networks*

Source: Simmons Multimedia Engagement Study, USA, Fall 2012

FIG 68.
TRUST IN ADVERTISING, BY MEDIA

% adults who trust advertising in each medium



Source: Consumer attitudes towards advertising in media in Europe, Print Power, 2013

newspapers and magazines, where the advertisements they carried were trusted to a much greater degree than in any other medium (Figure 68). The medium in third place was also a print product: catalogues, which ranked just ahead of TV commercials. Addressed direct mail was trusted rather more than advertising on the radio or internet, and below them unaddressed email was trusted more than social media.

Another finding from the survey was that, when considering advertising as a source of information to support purchase decisions, almost seven out of every ten consumers rated magazine advertising as the most important medium. The power of the printed word still rings true.

[7] COMPARING MAGAZINES AND OTHER MEDIA

The personal medium

A survey in Australia made comparisons between magazines and other media and showed that magazines stand apart as the personalised medium, the medium people turn to when they are seeking to indulge themselves in their favourite interests, the medium which gets closest to consumers. *Media Matchmaker: It's All About Relationships*, commissioned by Magazine Publishers of Australia [26], examined the roles of six media.

The qualitative stage of the study found that key associations for each medium were:

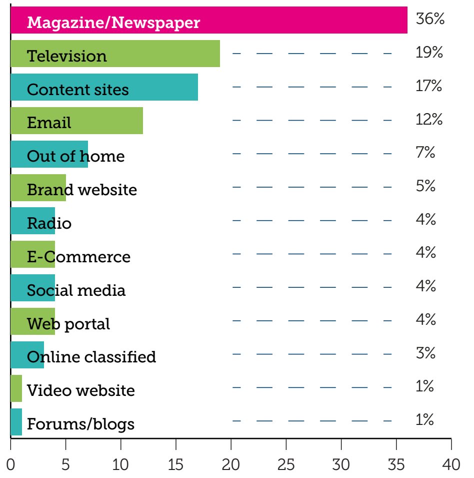
» Magazines: personal, trends, ideas, inspiration, window shopping, indulgence.
» Newspapers: information, news, things you can talk about.
» Free commercial TV: broad, entertainment, things you can talk about, for time out.
» Pay TV: special interest, sport, entertainment, for time out.
» Radio: broad,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

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

» "Keeps me up to date with latest styles": 64% of magazine consumers agreed with this statement. Next highest medium was free TV with 33% of TV viewers.
» "Inspires me with ideas": 54% for magazines. Next highest: online with 37%.
» "Good for window shopping": 52% for magazines and 51% for online. Next highest: newspapers with 30% agreeing.
» "Something I reward myself with and enjoy": 50% of magazine consumers agreed. Next highest: 30% of online users.
» "Information is tailored for my interests": 44% of magazine readers, and 45% of online users, agreed. Next highest: 24% of newspaper consumers.

The situation is very similar in Thailand. The Magazine Association of Thailand (TMAT) commissioned a programme of qualitative and quantitative research called *Reader Behaviour and Potential of Magazines*, published in 2010 [90]. The main reasons why consumers bought magazines, and their attitudes towards the advertisements, were the same as in other countries.

FIG 69.
MEDIA WHOSE ADS STIMULATE CONVERSATIONS ABOUT BRANDS



Base: consumers saying conversation about brand was stimulated by advertising – they were asked in what media?
Source: Brand Buzz Survey, OPPA, Belgium, 2013

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

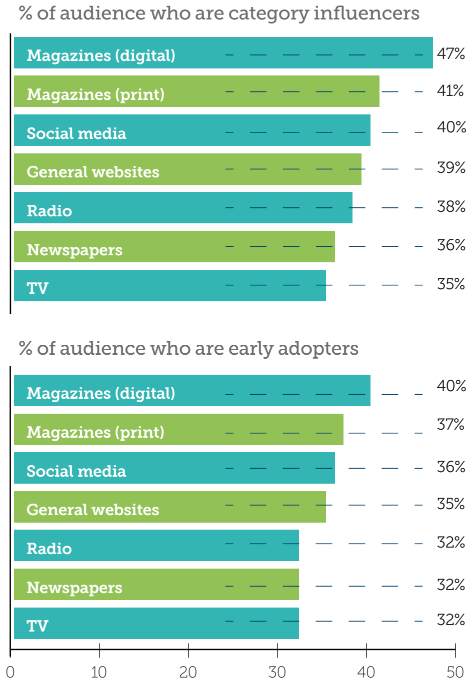
The more interested that respondents were in the product category of an advertised product or service, the more likely they were to recall the advertisement. Recall also depended upon the creative work, the information provided, and the magazine's image in the respondent's mind – that is, involvement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

Magazines drive word of mouth

Chapter 6 discussed magazines' ability to generate word of mouth communication. Direct comparisons between magazines and other media in this respect have been made by several studies.

A Belgian survey found that when consumers' conversations about products were stimulated by advertising, the prime media provoking these conversations were magazines and newspapers. In 2013 Belgium's Online Professional Publishers Association (OPPA) released its *Brand Buzz Survey* [86]. Consumers were asked "Which sources lead you to have a conversation with others about (named product category)?". If the answer included advertising, respondents were asked in which medium it was seen.

FIG 70.
MAGAZINES DELIVER INFLUENCERS AND EARLY ADOPTERS



Source: Media Connections Study, Magazines Canada, 2013

Figure 69 shows the buzz-generating power of advertising in printed magazines and newspapers. They lead the field. They were followed at some distance by television advertising, and just behind came content websites - which include magazine publishers' websites among others.

The same was found in Russia, among a number of other countries. The *TrendFormers* survey, published in 2010 by Hachette Filipacchi Shkulev [91], identified three groups of people in any one product category: Trendformers, Mainstreamers and Followers. TrendFormers were those who are very knowledgeable about the product category, are active in talking about it, and are able to convince other people. They are the persuasive opinion leaders, the 'influentials'. They rely particularly on magazines and the internet for keeping up to date with their information. Magazines are especially valued for providing Trendformers with an 'emotional' background to the topic area, and TrendFormers have much more intense contacts with magazines than the Mainstreamers and Followers.

Magazines Canada and BrandSpark

International, in their *Media Connections Study* of 2013 [87], found that in a range of product categories magazine audiences contained a higher proportion of product influencers than the audiences of other media. The study interviewed 3,000 Canadian consumers who were active shoppers in at least one of three product categories: food, beauty and automobile. 'Influencers' were defined as people who are knowledgeable about a product category and who take pride in informing themselves and others about the category. Reaching these influencers is key to generating word of mouth communication.

47% of users of magazine digital properties were found to be category influencers, and 41% of printed magazine readers (Figure 70). This was ahead of all the other media examined: social media, general websites, radio, newspapers and television. While all media do play a role in reaching influencers, magazines in digital and print forms take the lead.

There was a similar pattern among early adopters. They too are found in higher proportions among magazine audiences than among the audiences of the other media.

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

FIG 71. **TIME SPENT WITH MEDIA PER WEEK: CZECH REPUBLIC**

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

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

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

It is a point that was made in the social media chapter, for it is the same phenomenon.

Time spent on media

A considerable time is spent reading magazines; some examples are given in Chapter 2. Even though it is less than the time spent on several other media, it is substantial. In the Czech Republic, for example, an average of 4 hours 42 minutes per week was spent reading print magazines, and this rose to 6 hours 10 minutes when the digital editions were included – according to *MML-TGI CR* in 2010 [92]. This is greater than the time spent reading newspapers, but less than the time spent on the internet, listening to the radio or watching television (Figure 71).

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

Media multi-tasking

Commenting on the UK's *TouchPoints* survey [83], the IPA said "The amount of time people spent consuming all media continues to grow on a year on year basis... People are absorbing this overall increase in use by increasing media multi-tasking." Especially noticeable is the rise in using two screens simultaneously: typically operating smartphones or tablets while watching television.

FIG 72. **MEDIA MULTI-TASKING**

% who regularly engage in another medium at the same time

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

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

> **"By measuring brain activity, it has been clearly shown that it takes considerably more brain involvement to read a book or magazine than to watch TV. Reason being that when reading we're creating images in our mind's eye, whereas TV watching is simply the consumption of pre-packaged images. And because we're so passive in the face of television... we're not processing the information by interacting with it.**
>
> *The Rough Guide To Happiness*, by Dr Nick Bayliss

When multi-tasking, consumers' attention flows continuously from one medium to the other, back and forth, monitoring one while attending to the other, and reversing attention as something of greater interest of relevance pops up.

Media pluralists can interact with any two media forms but print magazines are subject to less distraction, and more immersion, than other major media.

It is in the nature of reading print that one has to focus on the words and apply at least a degree of attention. Reading is an active process that has to engage the brain. As the pages are turned they must be mentally scanned and a selection made of where attention will alight. In contrast, it is easier for consumers to be exposed to television and radio without fully focusing attention on them; they can be monitored as a background activity, ready to switch in less than a second. The consequence is that magazines have the highest proportion of users who are focusing exclusively on that medium, with fewer competing media or other activities distracting them.

For example in the USA in the *Simultaneous Media Usage Study* by BIGresearch in 2010 [93]. When reading magazines, 13% regularly also listen to the radio, 21% watch TV and 11% go online (Figure 72). This totals 45%, a smaller figure (i.e. less distraction) than for newspapers (50%), radio (55%), TV (62%) and online (91%). The media which most often simultaneously overlap are TV and the internet – a phenomenon which has increased further since the study was conducted.

As well as simultaneous usage of more than one medium, there can also be distractions from other activities while using media. Magazine and newspaper readers engage less than users of other media in non-media activities at the same time. The bottom row in Figure 72 shows that only 10% of magazine readers regularly engage in non-media activities while reading, compared with 20% of TV viewers while viewing and 27% of internet users while surfing.

In India the *AIM Engagement Survey* of 2011 [13] reported that 65% of magazine readers gave undivided attention to the magazine they are reading. For television only 35% of viewers gave TV their undivided attention, and for radio it was only 11% of listeners. Intermediate levels were reported for the internet (52%) and newspapers (51%).

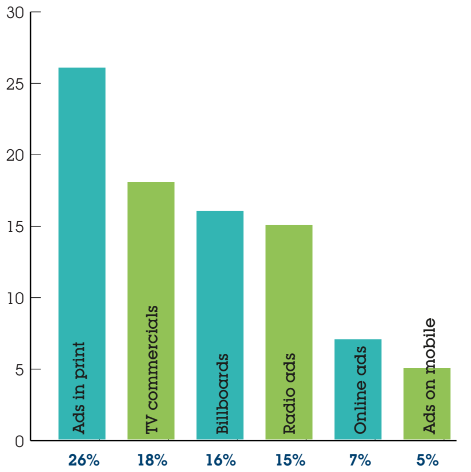
The next question is: when two media are used simultaneously, which one is more likely to attract primary attention?

"Magazine advertising is targeted to you – it's not an interruption, like TV."

Respondent in Media Matchmaker study, Australia

FIG 73. **MEDIA WHICH COMMAND CONSUMERS' FULL ATTENTION**

% who rated their attention level 4 or 5, on a scale of 1-5



Source: Click Here, Adobe Systems, USA, 2012

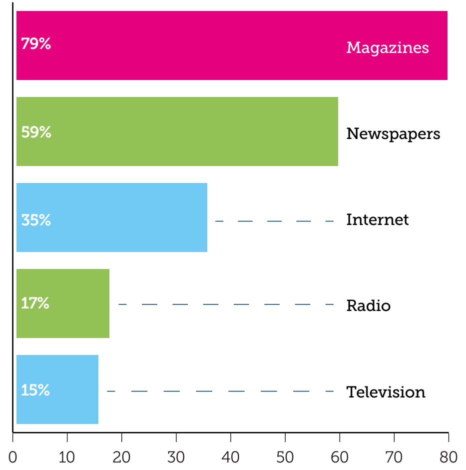
Primary attention

As James Geoghegan, President of Media Head, once said [94], "In a media-saturated environment where consumers are using more than one medium at a time, understanding which medium they pay most attention to is as important as knowing which media reach them."

Adobe Systems checked this out in 2012 in their *Click Here* study in the USA [95], with the results presented in Figure 73.

FIG 74. **PRIMARY ATTENTION**

When multi-tasking, % of time with medium when it receives primary attention



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

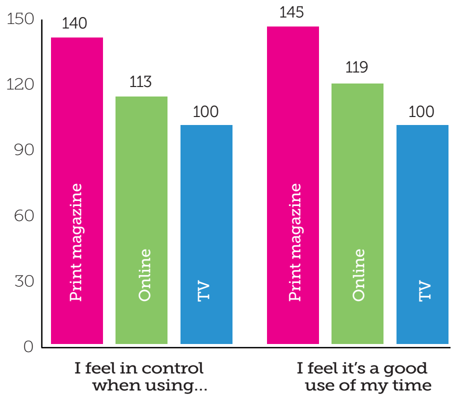
It is print advertisements which attract the most attention. It has long been so. Back in 2005 Ball State University in the USA showed in their *Middletown Media Studies* [96] that 79% of the time when magazines are used simultaneously with other media, magazines received the primary focus (Figure 74). This was considerably ahead of the other print medium, newspapers with 59%, while the non-print media lagged far behind both. For television it was the primary focus for only 15% of the time it was used in conjunction with other media.

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

It is similar for tablets, which also require scanning of each page and selecting what to read. In Germany the Axel Springer *iPad Media Impact Study* [68] showed that iPad content attracts primary attention when used in conjunction with TV. Respondents were asked "While using the iPad and watching TV at the same time, which medium gets more attention?"; 93% said the iPad receives prime attention, only 2% said TV, and 5% said both equally.

FIG 75. **FEELING IN CONTROL AND USING TIME WELL**

Indexed on TV=100



Source: Media Connections Study, Magazines Canada, 2013

The ads: annoying, or welcome?

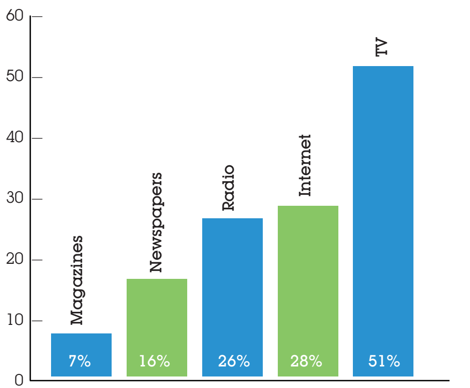
The *Media Experience Survey* in The Netherlands [64] has already shown that advertising on TV and radio (and the internet) is regarded as more annoying than advertising in print media (Figure 64). This is evidently universal across the world, from Taiwan to Europe, from India to North America, and no doubt everywhere else. It is in the nature of the different media.

The intrusiveness of TV and radio is a benefit to advertisers in many ways, but it frequently creates irritation among viewers. Moreover the commercials cannot be turned off in order to continue with the programmes; instead, in these linear media the audience must wait until the ads run their course before the programmes get under way again. The broadcasters are in control, not the viewers or listeners.

With print media it is the readers who are in control. If they scan an advertisement and in a flash decide they don't wish to pay further attention to it, they focus on something else on the page or turn to the next page. Instead of being a linear medium, print is an easy-access medium in which one can move forwards or backwards, repeatedly if desired, mentally screening things in and screening things out. Thus the ads tend not to create irritation. Moreover the targeted nature of the ads carried by magazines means that most are of some interest and relevance to most readers – far from being annoying, many ads are positively welcomed by readers, and acted upon.

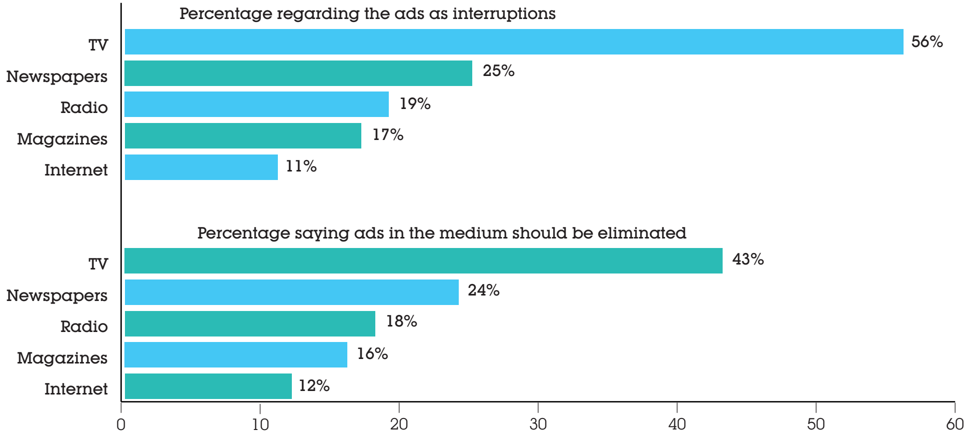
Magazines Canada, in their 2013 *Media Connections Study* [87], quantified this aspect of being in control – and in addition, assessing which media are considered a good use of time. Figure 75 shows much higher indices

FIG 76A. **PERCENT REGARDING ADS AS INTERFERENCE: TAIWAN**



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

FIG 76B. **ATTITUDES TO THE ADS IN MEDIA: INDIA**



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

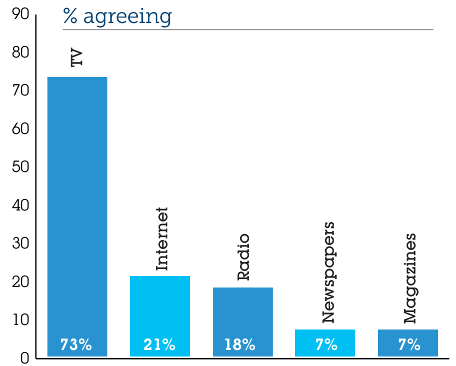
for printed magazines in terms of allowing consumers to feel in control, and to feel it's a good use of their time.

There is research from many countries around the world which contrast the acceptability of magazine advertising with the interruptive effect of advertising in other media. Here are three examples from very diverse media markets.

In Taiwan the Magazine Business Association of Taipei (MBAT) published the *Survey on Consumption Trends of Magazine Readers in Taiwan* in 2011 [97]. Among magazine readers who read magazines for more than one hour per week, 51% regarded television advertising as interference, compared with only 7% who regarded magazine advertising in that way. Figure 76a shows results for five media, and it is notable that the two print media were least regarded as interference.

In India the *AIM Engagement Survey* [13] found that 56% of adults feel the advertising on TV is an interruption, appearing at inconvenient times – contrasting with magazines where only 17% feel the advertising is an interruption (Figure 76b). The survey also reported that 43% of adults believe that ads in TV should be eliminated – contrasting with only 16% for magazines. Put another way, 84% of readers believe ads are part

FIG 77. **'ADS IN THIS MEDIUM REALLY ANNOY ME': GERMANY**



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

of the magazine experience.

In Germany the survey *Medienprofile und Medienbegabungen*, from the Institut für Demoskopie, Allensbach [98] revealed that 73% of adults agreed that 'Advertisements in television really annoy me'. For magazines and newspapers the figure was only 7% (Figure 77).

And so it continues, from country to country. Magazines are unique in that the advertising they carry is an acceptable and often welcomed part of the package – ideal conditions for building trust in the ads, and making readers receptive to them.

7 up

WHEN MEDIA ENGAGEMENT BONDS WITH ADVERTISING

The University of the Andes in Chile published in 2013 a study of nine aspects of media engagement, which found that seven of them correlated with advertising effectiveness. Namely, when a medium:

- contributes to social interactions
- meets information needs
- makes me smarter, helps me learn
- 'inspires me'
- makes me talk with others about medium's contents
- is considered a good way to spend spare time
- its advertising content is welcomed

The study found that magazines scored better than TV or newspapers on these seven aspects. In Chile, "magazines are able to generate experiences for the readers that have a positive impact on advertising effectiveness."

Source: 'Engaging readers: a study of magazine advertising effectiveness in the Chilean media market', University of the Andes, Santiago, Chile, 2013 [12]

Distinctive positioning for magazines as communicators, influencers and motivators

The broad picture to emerge from the evidence in this chapter is this: the closeness of readers to their chosen magazine brands, and all that flows from that, means there is a distinctive and valuable role for magazine media as part of a multimedia ad campaign. In the comparisons with other media, magazines are seen to have particular strengths which set them apart as unique in the way they communicate with, influence and motivate their consumers. ❤

"Advertising is integral to every magazine. When you buy a copy of *Vogue*, you expect to see fantastic adverts for fantastic bags and shoes. It is part of the experience."

Respondent in Media Experience Survey 2012, The Netherlands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8

CAMPAIGN EFFECTIVENESS: KEY PERFORMANCE INDICATORS

- Magazine media make a big contribution at all stages of the consumer journey.
- The natural synergy between media means that when magazines are combined with other media a beneficial multiplier effect occurs. For example, magazines make TV and online work harder.
- Adding magazines to a media mix campaign improves campaign KPIs.
- Calculations of ROI show magazines among the most cost-efficient media.

- This and the next chapter investigate magazine media's contribution to effectiveness within advertising campaigns.
- First, this chapter looks at evidence about magazine media's capabilities in nudging consumers along their journey towards purchase, as revealed through a series of key performance indicators (KPIs). These are ways of describing different stages along consumers' decision-making process.
- Second, Chapter 9 goes beyond these intermediate staging posts to the ultimate criterion: sales (or sometimes an alternative end-goal). There is ample proof that magazine media generate additional sales when used in campaigns.

The consumer journey, and KPIs

The consumer journey is no longer conceived of as simply a linear progression in logical sequence from Step 1 (discovery and awareness of the product) through to the final step (purchase). Instead, with the diversity of devices, media, information and other influences open to us today it can take more varied and unpredictable forms. Moreover once a purchase has been made the post-purchase experience has an impact on future attitudes and intentions. The experience will loop back up to earlier stages to encourage or discourage repurchase, producing a more circular or convoluted 'journey'.

A general-purpose description which one might use in thinking about this chapter's research is listed here, and sketched in Figure 78:

» Discovery; awareness
» Research; knowledge-acquisition; familiarity
» Forming opinion; influence from others; likeability
» Purchase consideration/intention
» Purchase
» Post-purchase evaluation
» Bonding, ambassador; or dissident

The post-purchase evaluation may be very positive, leading to an emotional bonding with the product, and feeding back upwards into the stages of knowledge, opinion and re-purchase intention. The consumer may become a brand ambassador who might influence others. If the post-purchase evaluation is negative, not only will the feedback looping upwards discourage re-purchase, but also the consumer may become a brand dissident who deters others from purchasing.

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

The KPIs (Key Performance Indicators) for a marketing campaign measure the situation at one or more stages in the decision process applicable to the particular product. In a media planning context, the KPIs can be used to assess which combinations and weights of media form the most effective campaign plan.

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

Synergy between media: the media multiplier

One of the reasons why television, internet, magazines and other media work well together is the synergy that occurs between these different forms of communication. They work in different but complementary ways; each one enhances the performance of the other. This is one key to understanding this chapter's evidence on KPIs.

A large body of research over many years has proved conclusively that:

» A second medium can communicate ideas additional to those derived from seeing another medium
» The second medium can affect and enrich what is understood from a subsequent exposure to the first medium

Specifically considering advertising in magazines in addition to TV and online, rather than advertising only on TV and online, there are some important communication benefits:

» Seeing a magazine ad can lead people to perceive the TV commercial in new ways, and derive more from the TV advertising
» Magazines can also convey new information that is not in the TV commercial
» The result of adding magazines to a TV campaign is a richer, more complete communication
» A television and/or online campaign working in tandem with a magazine campaign outperforms a campaign without magazines, within the same budget

Print is a great complement to the screens used for TV, social media, publishers' websites and other websites. The page and the screen nourish

FIG 78. **THE CONSUMER JOURNEY**

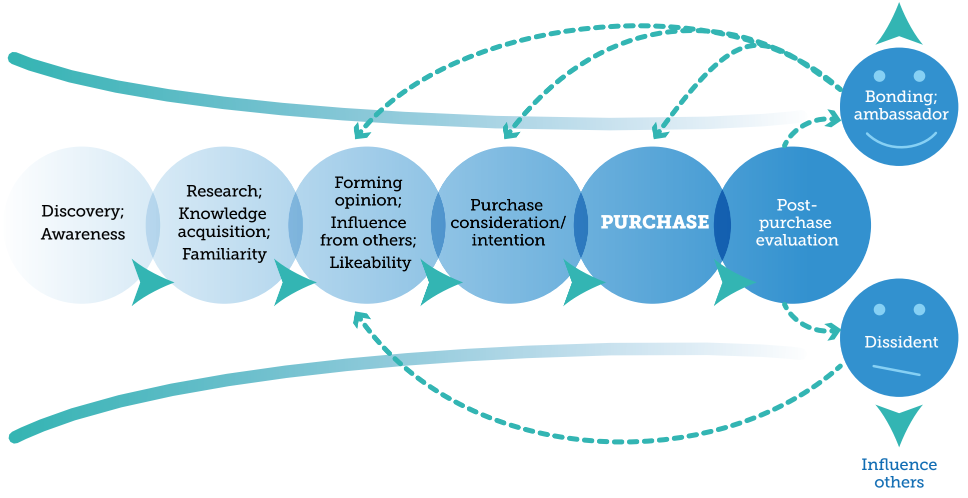
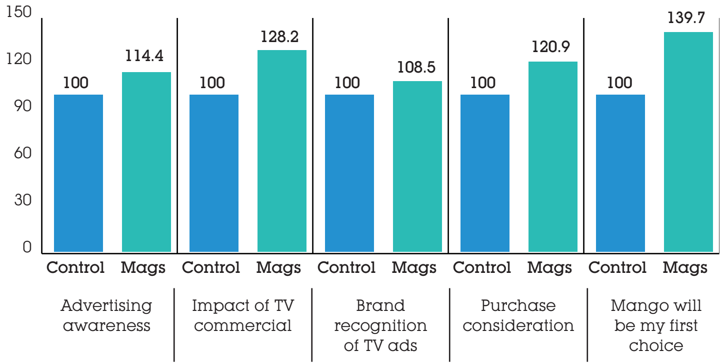


FIG 79. **MAGAZINE ADVERTISING LIFTS KEY PERFORMANCE INDICATORS**

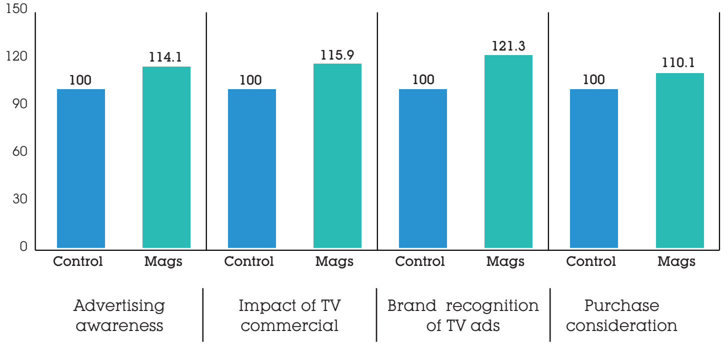
(1) Mango fashion brand



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

FIG 80. **MAGAZINE ADVERTISING LIFTS KEY PERFORMANCE INDICATORS**

(2) Aggregated results from campaigns measured in 2010-2011



Base: Women who have seen TV advertising. 'Control': not seen magazine advertising. 'Mags': have seen magazine advertising. Source: Atenea, 2010–2011, ARI, Spain

each other.

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

Magazines initiate the media multiplier – and make TV work harder

The *Atenea* system in Spain has proved the consistent and powerful contribution made by magazines in campaigns in which television is the principal medium. *Atenea* was commissioned by a consortium of publishers (Hearst, RBA, & G+J Motor Press), in association with ARI, the Associacion de Revistas de Informacion [99].

Atenea involves a campaign tracking study combined with analysis tools which quantify what magazines have achieved. *Atenea* has measured several hundred TV+magazines campaigns. *Atenea* interviews consumers who have seen the TV advertising, and divides them into those who have also seen the magazine advertising and those who have not (the control group). Care is taken that both groups have received the same level of exposure to the TV campaign and have

Scan page to watch Atenea, Spain Video

similar socio-demographic and other characteristics.

A typical example is the advertising for the Mango women's fashion brand, studied in 2011. Figure 79 presents the Mango results for five KPIs. Indexing the control group of women (those not seeing magazine ads) as 100, those exposed to magazines had 14.4% greater awareness of the advertising campaign.

A fruitful trend: female magazine readers had almost a 15% greater awareness of the Mango advertising

Tellingly, the magazine advertising made the *television* advertising work harder (second and third blocks of bars in Figure 79). Respondents were shown frames from the TV commercial, without the brand being revealed. In a measure of the impact of the TV commercial, consumers who had also seen the magazine ad produced scores that were 28.2% higher than those who had not seen magazine ads. Moreover among consumers who recalled having seen the TV commercial, those who'd seen the magazine ads were 8.5% better than the control group at correctly stating the brand in the commercial. The magazine ads had helped many consumers to take out more from the TV commercials. This is a classic example of the media multiplier effect working at a granular level. Each medium helps the other media to be more effective.

The benefit of magazines was particularly strong as the measures came closer to the point of purchase. Purchase consideration was 20.9% higher among the women who had seen the magazine ads, compared with the control group. The index was higher still among those who declared that Mango will be their first choice: +39.7%. These are the bonded people, the potential brand ambassadors.

Moving from individual campaigns, *Atenea* has aggregated results across all campaigns studied during 2010 and 2011. Figure 80 presents the outcome. As before, the base is those who have seen the TV advertising, and the comparisons are between those consumers who have also seen the magazine advertising, and those who have not (the control group).

Compared with the control group, for the average campaign those seeing magazine advertising were 14.1% more aware of the advertising; scored 15.9% higher on a measure of impact of the TV commercial; were 21.3% more aware of the name of the brand; and purchase consideration was 10.1% higher.

Other analyses of the *Atenea* database have shown that, in campaigns where TV advertising is the main medium, magazine advertising adds substantial value:

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

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

Magazine media contribute at all stages of the journey

Another example demonstrating this comes from Canada, in the *Media Connections Study* of 2013 from Magazines Canada and BrandSpark International [87]. The Canadians framed the consumer journey in three stages: consideration (what is available?), evaluation (how do they compare?) and purchase (which one is right for me?).

A sample of 3,000 consumers active in purchasing food, beauty products or automobiles was asked how important each of 13 media were in influencing their decision-making at each of

FIG 81. **MAGAZINES AND THE CONSUMER PATH TO PURCHASE**

Stated importance of media: top two box

	Consideration	Evaluation	Purchase
Ads in	Automotive	Food	Beauty
Print magazines	POW	POW	POW
Magazine websites	POW	POW	POW
Magazine apps		POW	POW

Top two box = top two positions on scale of importance. Source: Media Connections Study, Magazines Canada, 2013

the three stages. The 14 media were TV, radio, print magazines, magazine websites, magazine apps, paid-for newspapers, free newspapers, online, web search, social media, online games, out of home, and direct mail.

For all three product categories, magazines in two or all three of their listed platforms – print, websites and apps – frequently recorded high impact among consumers. That is, they were scored in one of the top two boxes on a scale of importance of the advertising in recent or upcoming purchase decisions. To illustrate this, Figure 81 shows the outcome for automotive products (the Consideration stage), food purchases (Evaluation) and beauty products (Purchase).

Another way of looking at the data is to estimate the return on investment (ROI) of each medium, where the impact of the advertising (top two boxes for importance) is compared with its cost.

Figure 82 shows that TV attracted 75% of all food advertising expenditure in Canada in 2012, associated with an impact rating of 20%. The final column shows, in index form, TV's impact divided by its share of spending; this is indexed as 1.0. Print magazines attracted only 8% of the adspend but achieved a 15% impact rating, giving an efficiency index of 6.7. The return on investment in magazines was almost 7 times greater than that of TV. Online and out of home media were also substantially higher than TV.

Figure 83 presents similar data for beauty products. The differences in cost-efficiency are not as great as for food, but again magazines prove to have bigger impact per dollar than TV and online.

Figure 84 provides data for automotive. TV takes 61% of the spending but delivers an impact rating of only 14%. By contrast, print magazines won only 3% of the budgets but produced an impact score of 11%, meaning that the cost-efficiency was 16.5 times higher than for TV. Out of home and radio performed well, and all five media performed much better than TV in terms of return on investment. The conclusion is that it pays to re-allocate a portion of the TV budget into the other media, especially magazines.

Re-allocating just 1%-2% of a TV budget

In Germany the *TV Ad Lift!* study published in 2014 [100] showed how adding to a television campaign one magazine carrying an ad in only two issues can significantly improve recall of the advertising, the brand, and the message, and also the likeability of the advertising.

The magazine was publisher TV Spielfilm Verlag's fortnightly television guide *TV Spielfilm*, and the cost of the magazine advertising could be met by increasing the budget by a mere 1%-2%, or by reallocating 1%-2% of the TV budget.

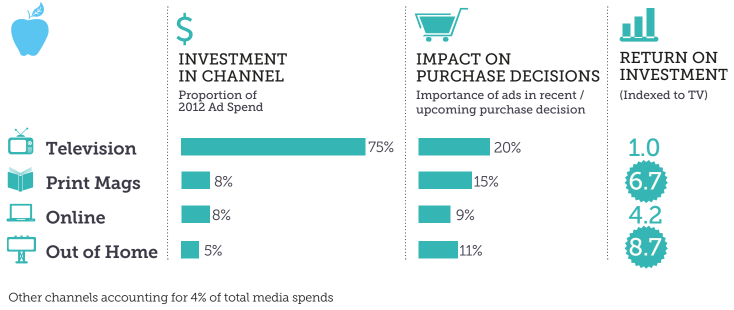
The Nielsen Company researched ten TV campaigns from varied product categories – ranging from chocolates to railways, and from internet services to investments. The Nielsen TV Brand Effect methodology was employed: consumers were interviewed about the TV programmes they watched the previous evening, and their reading of TV guides. For each of the ten brands, relevant sub-samples were those who saw the programme containing the TV commercial, subdivided further into those who have read either or both of the two issues of *TV Spielfilm* carrying the print ad, and those who have not. Findings were presented as average results from aggregating the ten campaigns (Figure 85).

Across all measurements, consumers exposed to the two magazine ads showed distinct increases: 20% higher ad recall, 15% higher brand recall, 42% higher 'efficiency', 5% higher recall of message, and 56% higher likeability.

Moreover the two magazine insertions delivered these increases at a reduced cost per percentage point. The price in euros to deliver one percentage point of ad recall was 15% lower for TV+magazine than for TV only; the price per percentage point of brand recall was 28% lower; and the cost per percentage point of message recall was also 28% lower.

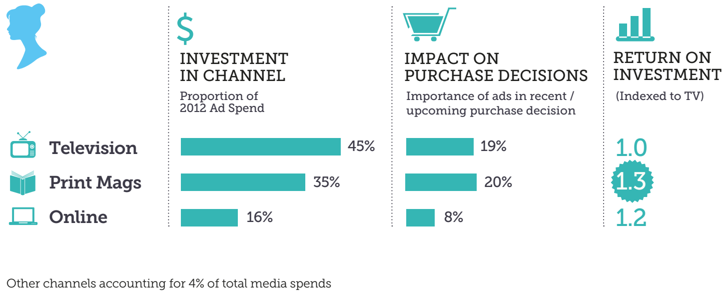
Shifting even very small portions of a TV budget towards TV+magazines can have a strong impact on campaign efficiency.

FIG 82. **RETURN ON INVESTMENT: FOOD**



Source: Media Connections Study, Magazines Canada / BrandSpark, 2013

FIG 83. **RETURN ON INVESTMENT: BEAUTY**



Source: Media Connections Study, Magazines Canada / BrandSpark, 2013

[8] KEY PERFORMANCE INDICATORS

FIG 84. **RETURN ON INVESTMENT: AUTO**

	INVESTMENT IN CHANNEL (Proportion of 2012 Ad Spend)	IMPACT ON PURCHASE DECISIONS (Importance of ads in recent / upcoming purchase decision)	RETURN ON INVESTMENT (Indexed to TV)
Television	61%	14%	1.0
Print Mags	3%	11%	16.5
Online	12%	9%	3.3
Out of Home	4%	11%	12.0
Radio	5%	11%	9.6
Newspaper	14%	16%	5.0

Source: Media Connections Study, Magazines Canada / BrandSpark, 2013

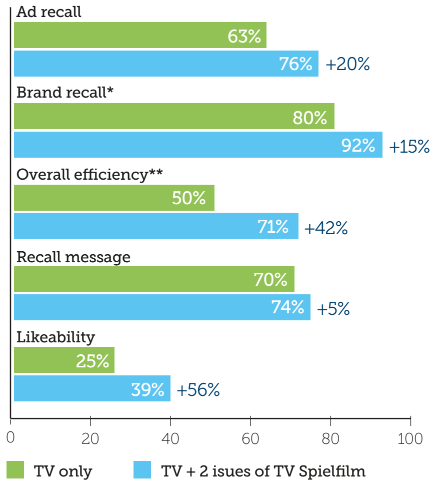
KPIs for BMW and Mercedes

The *Ad Impact Monitor (AIM)* in Germany [18] includes a regular *Ad Tracking and Brand Tracking Study*. The Ad Tracking assesses creative work, while the Brand Tracking assesses media strategy. Originally it dealt only with print ads but from 2014 it has included online ads.

A published example of the ad tracking is the BMW print and online campaign for a new model [101]. The online ad was a video showing the car in action. The effects of each ad on five KPIs are presented in Figure 86. Also shown are the norms derived from all ads measured: 4,840 to date.

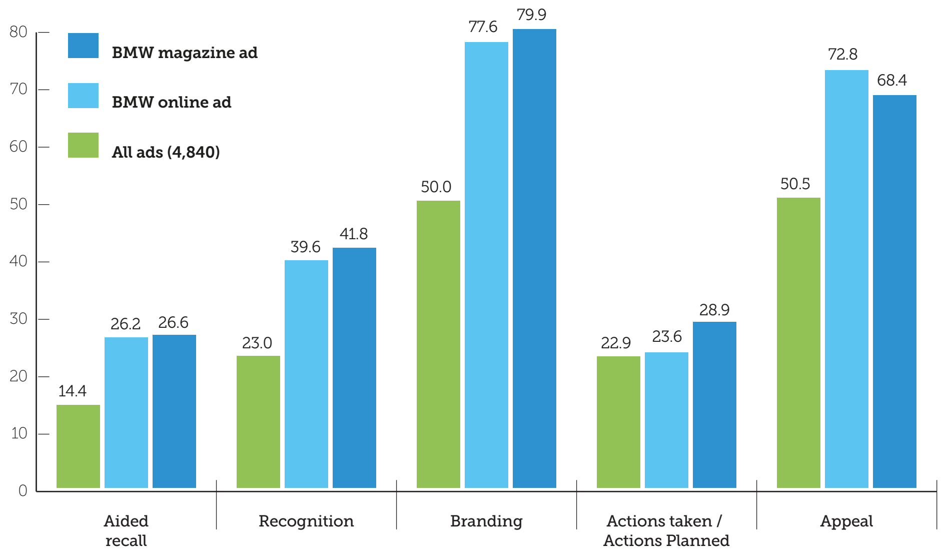
In almost all the KPIs the print ad performed slightly better than the online ad, and especially so on actions taken or planned. The exception was Appeal, where the video of the sleek car scored rather higher than the static print ad.

FIG 85. **ADDING TV MAGAZINE TO TV ADVERTISING:** GERMANY



** Among those who recalled the ad*
*** Ad recall times correct brand linkage (e.g. for TV only, 63% x 80%=50%).*
Source: TV Ad Lift! What a TV Magazine Adds to TV Advertising, Hubert Burda/Nielsen, Germany, 2014

FIG 86. **KPIs FOR BMW: PRINT COMPARED WITH ONLINE**



All-ads norms: based on 4,840 ads. Scores in %. Source: Ad Tracking Study, Ad Impact Monitor, Germany, 2014

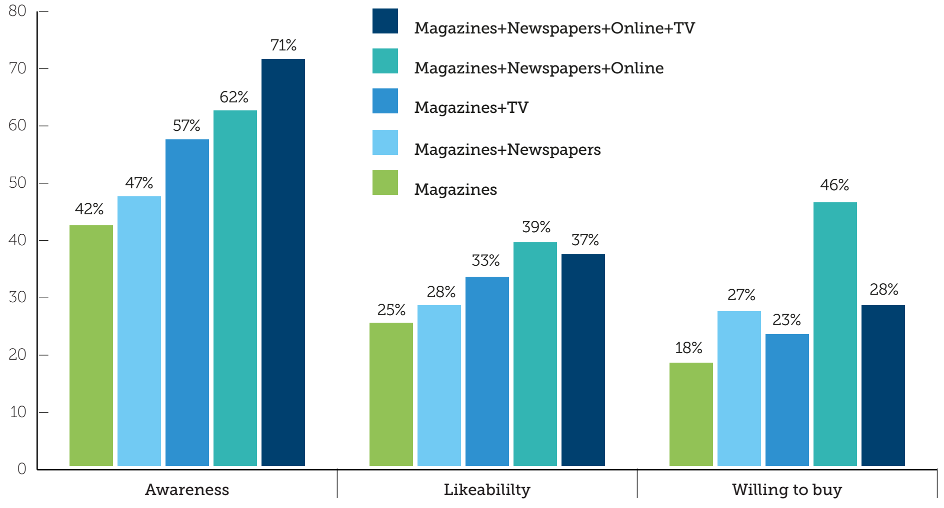
Against all five measures, the two BMW ads outperformed the norms.

An example of the AIM brand tracking media planning data is a Mercedes Benz campaign. One form of analysis compares different media combinations, and how they affect various KPIs. In Figure 87 the ad expenditure is the same for all five groups; the target audience is classified

The wheel deal: in almost all KPIs, the print ad for the BMW i8 performed better than the online version, especially so on "actions taken or planned"

according to the media channels to which they were exposed during the campaign. It shows that, in the case of this Mercedes campaign, magazines on their own produced good awareness; adding newspapers increased the figure; adding TV increased it more; using magazines + newspapers + TV; and finally using all four media maximised awareness. What is more striking about Figure 87 is that for likeability the best combination was magazines + newspapers + online; and

FIG 87. **COMPARING MEDIA COMBINATIONS FOR MERCEDES BENZ**



Base: Adults 35-59, income €3000+. Scores in %. Source: Brand tracking, Ad Impact Monitor, Germany, 2013

for willingness to buy, those exposed to this combination stood out markedly.

Another analysis showed how each KPI changed as the level of exposures to a medium changed. For instance, with magazine issues containing the Mercedes ads, the effect of low, medium and high contacts was that likeability rose from a score of 26% to 30% to 40% respectively, illustrating that more exposure to magazines created more effect. If that sounds obvious, it cannot be taken for granted. For online ads, by contrast, there was no such effect; the score for low online exposure was very similar to the score for high exposure.

High magazine ROI in aggregated results

In addition to being a source for publishing results for a number of individual brands, the *AIM Brand Tracking* data have been aggregated to show overall results. Figure 88 presents two pie charts from 906 brand models. These show the share of advertising expenditure, and the share of overall 'effect', for TV, magazines, newspapers and online. Overall 'effect' is calculated by aggregating the results for six KPIs (ranging from unaided ad recall to purchase intent), across the 906 cases.

On average, TV took 59% of the budget but only contributed 43% of the effect. Magazines, on the other hand, took 23% of the budget but contributed 33% of the effect. Newspapers and the internet, too, contributed more in effect than they cost in euros.

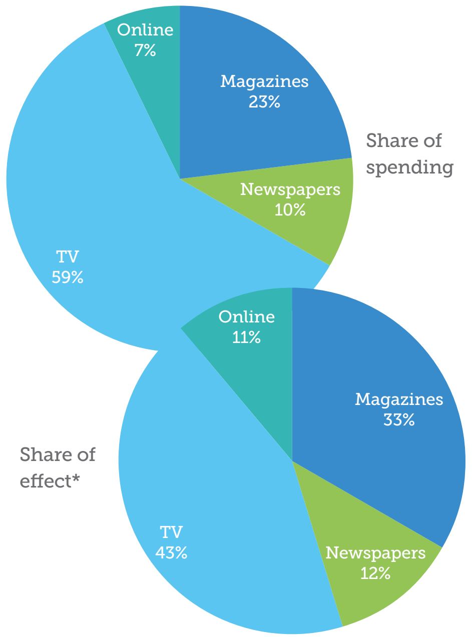
Another way of looking at this situation is to calculate the ROI of each medium, based on dividing the share of effect by the share of spending. Figure 89 presents the outcome, indexed with TV's ROI as 100.

Based on the very large sample of 906 brand analyses, newspapers' average ROI was 64% higher than that of TV, while magazines' was virtually double, at 97% higher. Online, accounting for only 7% of the budgets, achieved an average ROI that was more than twice TV's.

It is reasonable to conclude that the great majority of the brands in this mega-analysis could have increased the effectiveness of their campaigns by re-allocating a portion of their TV budgets into other media.

The reason is that the level of expenditure of TV advertising would have been beyond the point of severe diminishing returns, while other media – including magazines – were still on a steeply rising part of their curves. This is a topic discussed in Chapter 9.

FIG 88. **SHARE OF SPENDING VERSUS SHARE OF EFFECT**



**Aggregating data on 6 KPIs: unaided & aided ad recall, brand awareness/appeal/usage, purchase intention. Base: 906 brand models, each spending > 1 million euros in consumer magazines and > 2 million euros in total. Source: AIM Brand Tracking 2010, Germany*

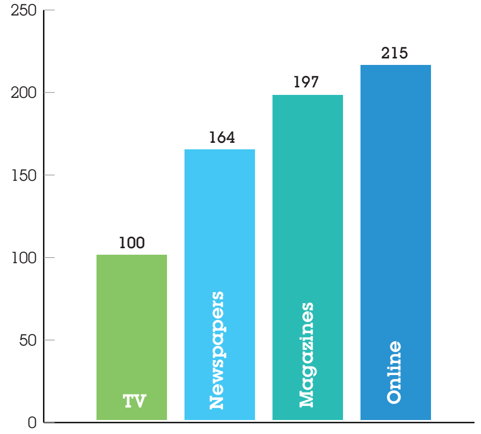
Post-purchase evaluation: the importance of bonding

The post-purchase evaluation stage in the consumer journey, which feeds back into future journeys and can influence other consumers, can be assessed in terms of bonding. Bonding is where the product is uniquely favoured by the purchaser, or is considered the best at what it does.

In its *Magonomics* project of 2012 the Professional Publishers Association (PPA) in the UK [102] examined the impact of magazines in helping to create bonding. The PPA worked with media agency Mindshare UK, part of the WPP group. The research tool was BrandZ (pronounced 'Brand Zee') which is conducted by Millward Brown. It is an annual, international study that is conducted to a consistent template in 31 countries.

A typical BrandZ study interviews 400 category consumers about their relationship with the brands in the category and evaluates brands across several dimensions.

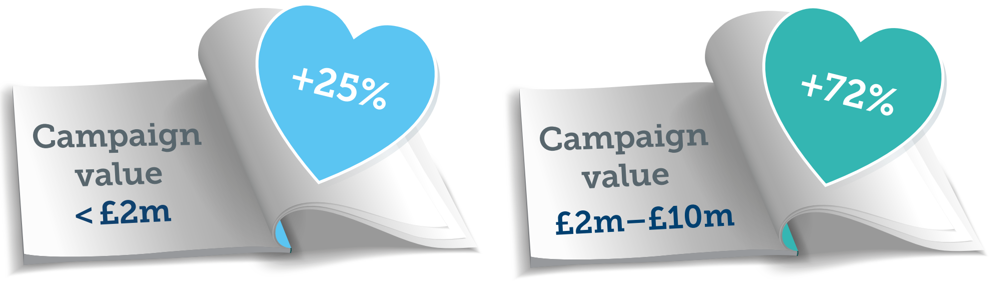
FIG 89. **INDEX OF ROI: 906 BRAND MODELS (GERMANY)**



Based on data in Figure 88: share of effect divided by share of spending. Indexed on TV = 100. Source: AIM Brand Tracking 2010, Germany

FIG 90. **HIGHER MAGAZINE SHARE OF BUDGET LINKED WITH HIGHER BONDING**

Uplift in bonding scores if magazines are allocated 8% or more of budget



Source: Magonomics, PPA, UK, 2012

One of these is the Brand Pyramid which assesses the relationship a brand has with its consumers. At the top of the pyramid is Bonding, which is regarded as the most important element. Millward Brown has established that on average a bonded consumer will allocate one third of choices to their bonded brands. The stronger the bonding, the greater the likelihood of re-purchase.

Mindshare and PPA examined BrandZ data for 136 brands researched in the UK in 2011, which used magazine advertising, and combined this with data on the brands' advertising investment as reported by Nielsen.

Across the 136 brands, magazines accounted for 7% of the advertising budgets on average.

The analysis then isolated brands which invested 20% or more of their budgets above this average, i.e. 8%+ ('heavy magazine users'), and compared their bonding scores against brands which spent below 7% in magazines.

These two groups were further divided into those whose total media budget was less than £2million, and those spending between £2 million and £10 million. Among campaigns spending less than £2 million in total, the heavy magazine using brands enjoyed a 25% uplift in their bonding scores compared with brands which spent less than 7% in magazines (Figure 90).

Among campaigns spending between £2million and £10million in total, the heavy magazine using brands enjoyed an even more impressive uplift of 72% in bonding scores.

Whether the total budget is small or large, allocating more than 8% of the media budget to magazines is consistently associated with stronger brand bonding. When the exercise was repeated for other media, it was discovered that magazines were the only medium which showed a consistent positive correlation between higher investment levels and higher bonding scores.

The PPA attributed the strong results to the power of the reader-relationship. "Magazines are trusted by readers, and advertising is viewed as part of the content offering. Brands that use them always benefit from this relationship."

Further research

There is a large body of further research which demonstrates clearly that magazine advertising – on its own and as part of mixed-media campaigns – can significantly move products along the consumer journey and yield very good returns on investment. A small selection of this research may be found in the range of sources listed in the References appendix as reference [104].

MAGAZINE MEDIA ON THEIR OWN: IMMEDIATE MEDIA AND SILVER SPOON

The research cited in this chapter has featured magazines as part of multimedia campaigns. It is of course the case that magazine media on their own can boost products' KPIs. The chapter therefore ends with an example where magazine-only print and digital platforms prove effective.

Silver Spoon baking products are an example of a successful partnership between an advertiser and a publisher in going beyond the mere booking of space.

Immediate Media UK ran a campaign in 2013 called *Bake With The Best* [103] featuring four of Silver Spoon's baking products: Silver Spoon icing sugar, Allinson flour, Billington's unrefined sugar, and Nielsen Massey vanilla extracts.

The campaign featured 60 *Bake With The Best* recipes which ran in seven of Immediate Media's magazine brands, print and digital.

An extensive programme of research was carried out, including pre-, mid- and post-campaign effectiveness studies, using Immediate Media's regular online panel, a monthly tracker survey, several specialist panels, and focus groups.

The result of the campaign was significant increases for the Silver Spoon products in awareness, positive brand perceptions, and purchase intent. For example, for Nielsen Massey vanilla extracts, brand awareness rose by 243%, positive brand impressions rose by 110%, and purchase intent (definitely/probably will buy in future) increased by 163%.

To a considerable extent the recipes in the advertisements were regarded in the same way as recipes in editorial would be regarded. 55% of the total audience agreed that the Silver Spoon recipes were 'inspiring', and 45% agreed that "I valued the campaign contents (e.g. recipes) just as much as a magazine article".

The campaign's overall return on investment was calculated as an attractive £2.70 per £1 spent on advertising. In addition the marketing insight generated by the research was of great value to Silver Spoon. ❤

"The use of Immediate's research has benefited our business in many ways, such as getting quick and cost-effective consumer opinion. This has been quantitative and qualitative,and has been of great use."

Angela Westley, Head of Insight, The Silver Spoon Company

CAMPAIGN EFFECTIVENESS: [SALES]

- Magazines can generate sales, both on their own and as part of a media mix.
- Controlled tests show substantial sales uplifts from magazine advertising. It applies to new and established products, and to short-term and longer-term measurement.
- Magazines deliver high returns on investment – on average, higher than TV.
- Usually this is related to under-investment in magazine advertising.
- For many campaigns the expenditure on TV goes beyond the point of severe diminishing returns. The marginal money would be better invested in magazines or other media, which would generate more sales.
- In general, it would pay to at least double the current investment in magazines in mixed-media campaigns featuring TV.

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FOLLOWING THE PREVIOUS chapter's look at KPIs along the journey towards purchase, this chapter examines what is usually the ultimate criterion for judging success – sales. The collection of studies reported here are just a few of the many globally which demonstrate clearly that magazines can not only boost sales but they can do so very cost-efficiently, producing a very attractive return on investment.

Meredith print titles: 10% sales uplift

An average uplift in sales of 10% was achieved across 31 brands advertising in Meredith Corporation print magazines in the USA [79, 106]. These brands were part of the *Meredith Sales Guarantee*, a unique approach based on a research methodology which quantifies the impact of magazine advertising investment on actual brand sales. It is an ongoing project, with the most recent campaigns running in 2014.

Nielsen's HomeScan consumer panel is used to examine week by week sales of each product before, during and after the campaign periods. Households are classified into those which have been exposed to the magazine advertising and those which have not (the carefully matched control group).

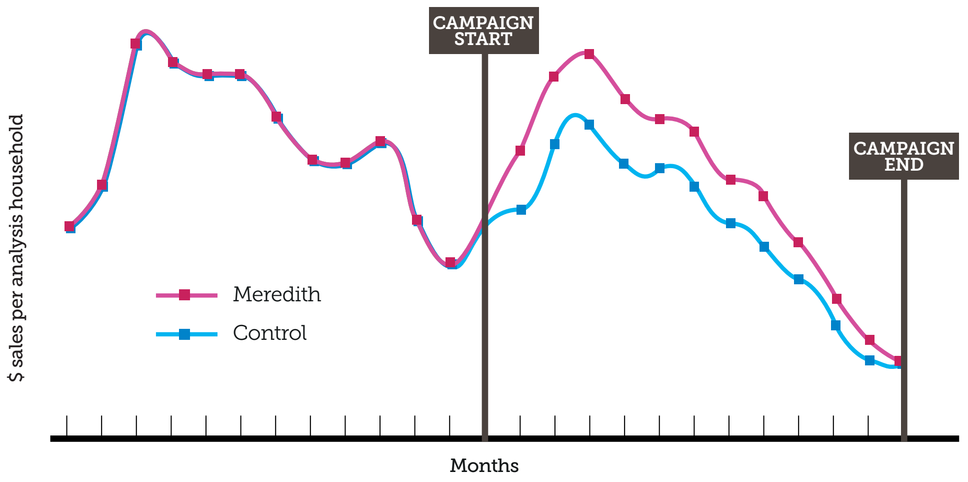
Figure 91 illustrates the method and the outcome, using sales trends data based on the average of the 31 brands. In the 12 months before the magazine campaign started, sales among the exposed 'test' group closely matched sales among the control group, but as soon as the magazine campaign launched, the two lines diverged. Those seeing the magazine ads recorded higher sales than those who did not, for every month of the campaign.

For each of the 31 brands there was a sales increase attributable to the magazine advertising

FIG 91. **MEREDITH PRINT MAGAZINE CAMPAIGNS: TRACKING OF SALES**

Average of 31 campaigns

Sales for all brands were consistently higher among the exposed group vs. the unexposed (control) group throughout the duration of the campaign



Source: Meredith Executive Summary June 2014, Meredith/Nielsen, USA, 2014

Picture perfect: Meredith campaigns yielded an impressive ROI of $7.54 for its titles

– a notable 100% record, which provides confidence that every advertiser using magazines may expect to enjoy a significant impact on sales, granted good creative work.

Nielsen's analysis showed that for most of the 31 brands the increase in sales was achieved principally through increasing the spend of existing purchasing households. For the other brands the uplift came mainly through increasing the number of buying households.

For each brand Nielsen calculated the return on investment (ROI) for the magazine advertising. ROI was defined as the incremental sales generated per advertising dollar. The average ROI across the 31 brands was a healthy $7.54. That is, the average dollar spent on advertising in magazines generated additional sales of 7.54 dollars.

Magazines: boosting TV viewing

It may be an unusual product to do so, but an American national network primetime comedy was launched using monthly magazines [107]. Using the Meredith Sales Guarantee system, a campaign was run in eight Meredith titles for two months prior to the first episode, aiming at the key demographic of 18-49 year old adults.

Subscribers to the eight Meredith titles were matched with Nielsen's national people meter panel, to create a test (exposed) sample. A matched non-exposed sample was created as a control. The result was that the Meredith households had higher ratings to the programme than the control sample, for both of the first two episodes (Figure 92).

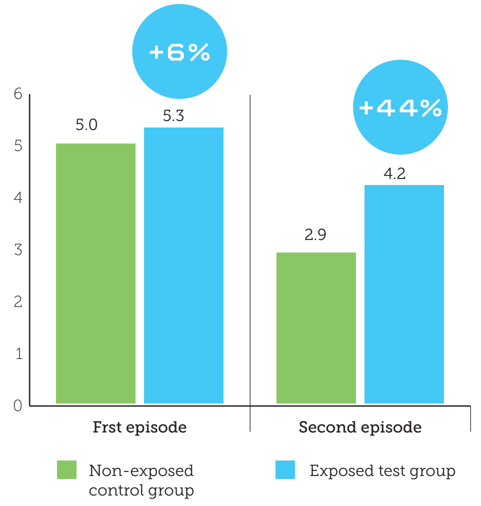
Among the control group, ratings for the second episode of the programme dropped off considerably, but among the Meredith test group the drop-off was much smaller, resulting in the Meredith-exposed sample recording a 44% higher rating than the control group. Thus not only did the magazine advertising yield higher ratings for the first episode, it also made it much more likely that households would watch both episodes.

Newcomer creates 18% sales uplift

Ken's Steakhouse salad dressing had never used consumer advertising; it had only used trade advertising and point of sale promotion [106]. It changed policy in 2012 and advertised in six issues each of four Meredith monthly magazines, joining the Meredith Sales Guarantee scheme.

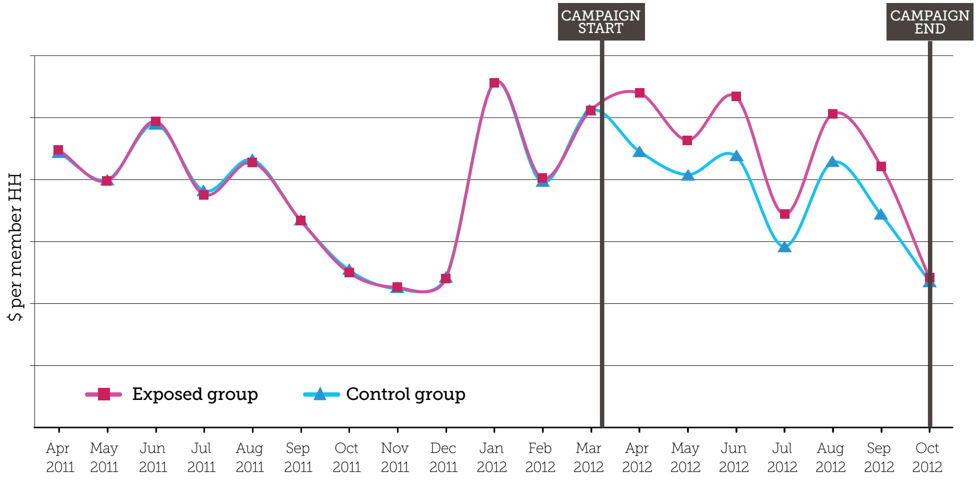
FIG 92. **MAGAZINES BOOST TV VIEWING**

TV programme ratings for first two episodes



Exposed/non-exposed refers to Meredith magazine issues carrying ads for the TV series. Base: Adults aged 18-49. Source: Meredith Sales Guarantee, USA, 2014

FIG 93. **KEN'S SALAD DRESSING: SALES AMONG EXPOSED V CONTROL GROUP**



Source: Magazines Drive Efficient Sales – Guaranteed, Meredith/Nielsen, USA, 2013

Sales rose by 18% in the exposed households compared with the non-exposed households. In addition, among the Meredith-exposed households sales increased by 11.5% compared with sales among the same households one year earlier. Clearly the total sales effect was partly due to existing purchasers buying more, and partly to new purchasers.

Figure 93 presents Nielsen's tracking data before and during the campaign. In the 12 months prior to the magazines campaign, the test and control groups of households (those exposed and not exposed to the Meredith magazines) kept very closely together even though sales levels fluctuated very considerably. But once the magazine advertising began, the sales reaction to advertising began immediately the magazines went on sale and continued throughout the campaign period – shown by the Meredith test group being significantly above the control group at every point.

Magazines and other media

Magazine media make a very cost-effective contribution to mixed-media advertising campaigns, in boosting sales. This conclusion arises consistently across many countries, and is clearly something which arises from the nature and character of the magazine medium, including the reader-relationship which builds up, and the physical properties of print magazines.

One of the main themes in recent research has been a comparison with television. We know that TV is usually the first choice medium for large-budget advertisers, and will remain so; and that other media are generally fighting for the non-TV share. But the medium's poor cost-efficiency compared with print and online does indicate that too high a proportion of the budget is being spent in TV, beyond the point where significant diminishing returns sets in.

Magonomics: lessons from econometric analysis

On average, magazine advertising achieves a higher return on investment (ROI) than television, the internet and newspapers. Usually this is related to under-investment in magazines: TV especially, and to some extent other media, tend to receive investment beyond the point of severe diminishing marginal returns, while magazines are normally left on a steep part of the diminishing returns curve where ROI has not yet flattened out, and further investment would reap rewards.

These were among the principal conclusions of the *Magonomics* project, commissioned by the UK's Professional Publishers Association (PPA) and conducted by media agency Mindshare UK in collaboration with their associated econometric modelling company Ohal, and published in 2012 [102]. (The Magonomics results concerning the consumer journey were discussed in the previous chapter.)

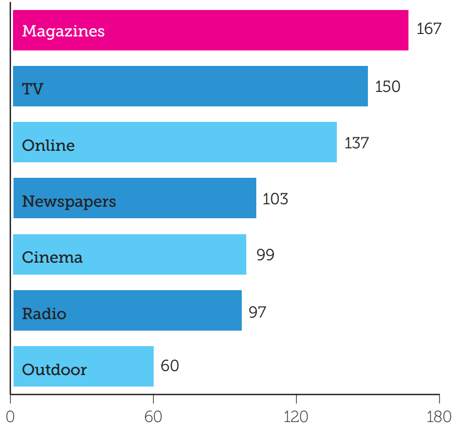
Magonomics examined econometric data from 77 real-life advertising campaigns which spent up to £6 million.

Analyses were carried out to model the effect of re-allocating more of the budget to magazines. The results consistently showed that there was an overall increase in sales when magazine media were deployed at higher spend levels than were actually used – while remaining within the same budget.

Another key conclusion was that, for the brands covered, magazine budgets would have to be at least doubled before magazine ROI dropped down to the same level as television.

FIG 94. **MAGAZINES HAD HIGHEST ROI, FROM 77 CAMPAIGNS**

ROI index by medium, aggregated from 77 FMCG campaigns



Source: Mindshare/Ohal, Magonomics, UK, 2012

Magonomics: magazines have highest ROI

Mindshare and Ohal, with access to the actual sales figures, calculated the ROI for 77 real-life campaigns which spent up to £6 million and included magazines in the media mix. Brand by brand, each medium's contribution to the additional sales was modelled, and compared with the money invested in the medium.

Aggregating across all 77 campaigns produced an average ROI for each medium, expressed in index form.

Figure 94 shows that magazines yielded an ROI index of 167, 11% higher than that of TV and 22% higher than online. The ROI of newspapers, cinema, radio and out of home was considerably lower than these three.

"In the 21st century different media channels unfold their true impact only in interaction with each other"

G+J Crossmedia Success Barometer, G+J, Germany, 2014 [105]

FIG 95. **DIMINISHING RETURNS RESPONSE CURVES**

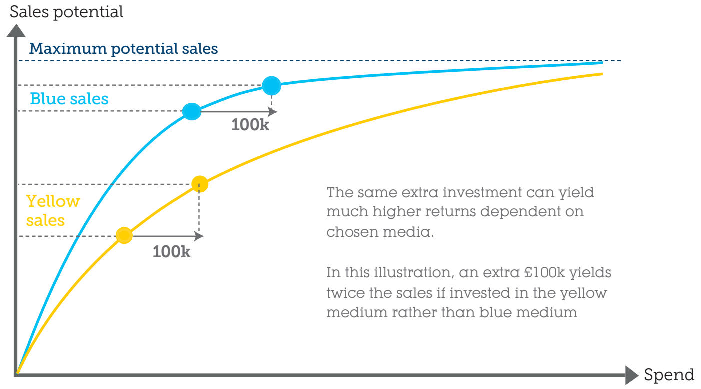
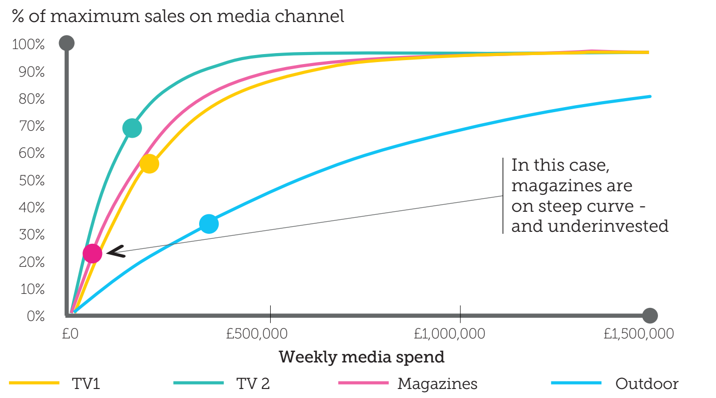


FIG 96. **DIMINISHING RETURNS ANALYSIS: REAL-LIFE CAMPAIGN A**



Source: Mindshare/Ohal, Magonomics, UK, 2012

The effect of diminishing returns

Looking to explain the superb performance of magazines, *Magonomics* found that it was due in part to under-investment in magazines, while TV tended to receive over-investment resulting in significant diminishing marginal returns.

Diminishing marginal returns curves are standard outputs for media channels evaluated in econometrics, and are modelled specifically for each campaign.

These curves show the expected additional sales generated by a given level of additional spend in a medium. It has long been established that as expenditure increases, further investment produces smaller and smaller increases in sales. The curves therefore have the type of shapes illustrated in Figure 95.

This chart suggests placing advertising with the blue medium first, rather than the yellow one, as it is produces more sales at low levels of spend.

However at some point – in this case at the blue circle – it gets close to its maximum potential. To spend another £100k in the medium would yield fewer sales than spending that £100k in the yellow medium which is still (at the first yellow circle) on a steep part of its response curve. Advancing to the second yellow circle yields twice the additional sales as spending the money advancing to the second blue circle.

Mindshare/Ohal looked in detail at the curves for five of the FMCG (fast moving consumer goods) campaigns.

To illustrate, Figure 96 shows the media used for one of the campaigns. It used two TV schedules – one terrestrial and one satellite – together with magazines and outdoor. The chart shows the curves for each medium, and the circles show the expenditure levels.

Magazines stand out as being under-invested. The response curve ahead of the magazine circle is steeper than that for any of the other media. Additional pounds spent in magazines would have a stronger impact than the last pounds spent in any of the other media. This was the general situation for most of the campaigns.

It is clear that under-investment in magazines is the underlying cause of magazines having the highest ROI.

Magonomics: double (at least) the investment in magazines

Looking at it the other way round: when magazines are seen to have a high ROI compared with other media, publishers naturally say "That's good!". However they should also say "That's bad – for the advertiser. Magazines should be given more investment till its ROI is reduced to the level of other media".

This is because sales are optimised when all the media being used have the same ROI.

To illustrate this, Mindshare/Ohal carried out a re-allocation modelling exercise, in which for some of the campaigns the spend in magazines was increased by 10%, 20% and 30%, taking the money from the least efficient medium in ROI terms. In each case, the result was a net increase in sales. The greater the extra spend in magazines, the greater the increase in net sales. The extra sales from the additional magazine investment was much greater than the loss in sales from the reduction in spend in the other media.

In a further modelling exercise, Mindshare/Ohal calculated for five brands by how much the spend in magazines would need to increase before its ROI fell to the same level as that of TV. The results varied by brand (Figure 97).

At a minimum, magazine spend needed to be doubled before magazine ROI dropped to the level of television's ROI.

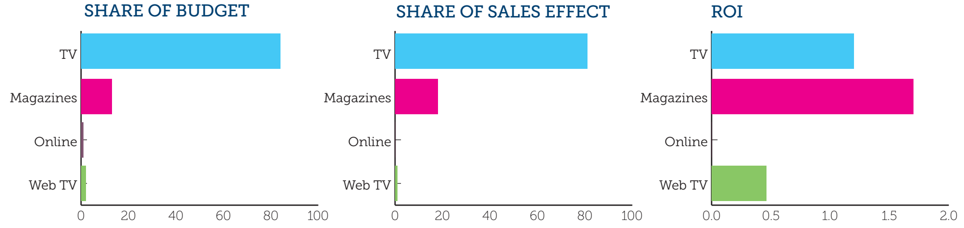
Magazines out-perform TV in Henkel Schwarzkopf case study

Ohal, the specialist in econometric modelling, was also involved in an instructive analysis in Sweden in 2011, on behalf of the publishers association

FIG 97. **INCREASE IN MAGAZINE INVESTMENT REQUIRED BEFORE MAGAZINE ROI FELL TO SAME LEVEL AS TV**

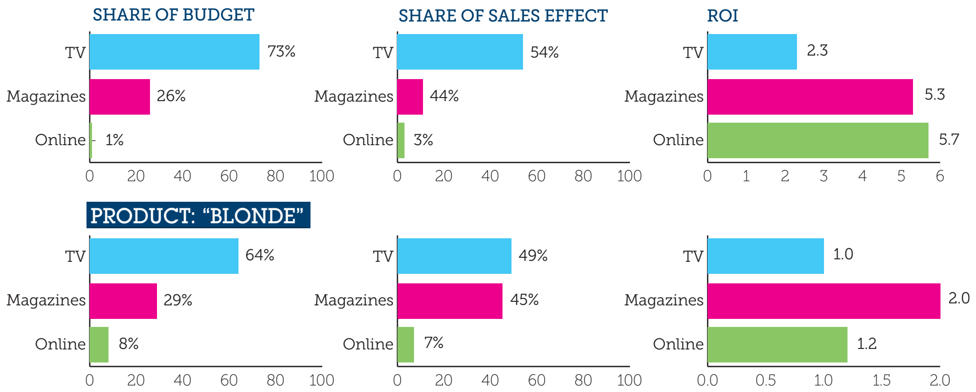
[9] CAMPAIGN EFFECTIVENESS: SALES

FIG 98. **GLISS HAIRCARE: MAGAZINES THE MOST COST-EFFECTIVE MEDIUM**



Based on weekly sales of Gliss shampoo and treatment products, week 41 2009 to week 20 2011. ROI is calculated on sales effects & budgets in krona, not on profile percentages. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

FIG 99. **SCHWARZKOPF COLOURING PRODUCTS: "ESSENTIAL COLOR"**



Based on weekly sales, week 21 2008 to week 20 2011. ROI is calculated on sales effects and budgets in krona, not on profile percentages. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

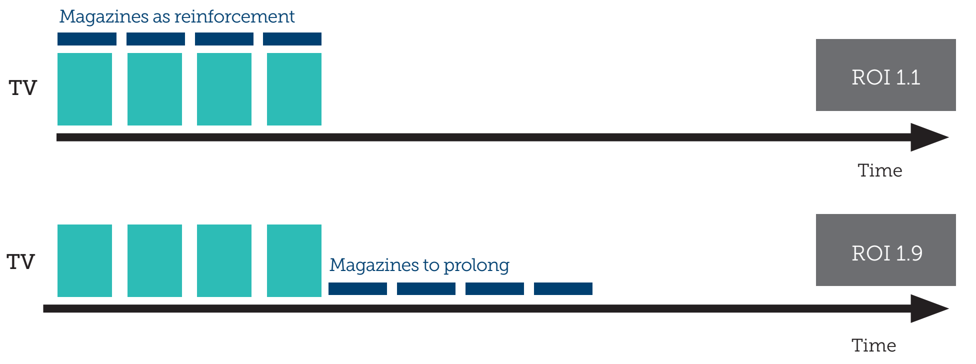
Sveriges Tidskrifter. Ohal and media agency MEC examined the effects on sales of advertising in magazines and other media. MEC's client Henkel and its Schwarzkopf brand's haircare products were the subject of the study [108].

Ohal's modelling method is described in Chapter 10. Its key output is estimates of Return On Investment (ROI) – defined as sales revenue attributed to each medium, divided by the cost of advertising in the medium. It shows how much each Swedish krona invested in a medium produces in terms of additional sales. An ROI greater than 1.0 means that the advertiser gets back more revenue than was invested.

For Schwarzkopf's Gliss haircare products, magazines proved to be the most cost-effective platform in Gliss' media mix. They accounted for 13% of the media budget but generated 18% of the additional sales from media, and achieved an ROI of 1.7 (Figure 98). That is, the average krona spent in magazines produced 1.7 krona of additional sales revenue, compared with TV whose average krona investment produced only 1.2 krona of additional sales revenue. Both media were considerably more effective than online and web TV advertising.

Schwarzkopf has several hair colouration products, of which two brands, Essential Color and Blonde, used the combination of TV,

FIG 100. **GLISS: REINFORCE V PROLONG**



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

"I was a little surprised that we could see such clear sales effects from the magazine advertising. We usually recommend that clients use magazines to build brand or increase awareness. But we rarely use increased sales as an argument for magazine advertising. This new study could change this."

Eva Westeson, Henkel account director at media agency MEC

magazines and online advertising. The profiles of media budget and sales effects, and the ROI figures, are shown in Figure 99.

In both cases, magazines' ROI was considerably higher than that of television which took two or three times magazines' budget share. For one brand, online advertising had a slightly higher ROI than magazines; online received only 1% of the budget and produced 3% of the sales effect. For the other brand, where online took a more significant share of the budget (8%), its ROI was lower than that of magazines.

Ohal's modelling also provided insights into the best way that Schwarzkopf could flight the magazine advertising in relation to the television campaign (Figure 100). Ohal modelled what would happen if magazines were used as reinforcement of TV by being published at the same time.

The magazine investment produced positive returns (ROI of 1.1) but this was lower than when magazines were modelled being used to prolong the campaign, running in the weeks after the TV campaign had finished (ROI of 1.9).

Modelling budget levels for Henkel

Ohal's modelling has also helped guide decisions about how much to invest in magazine advertising, in relation to television investment. For Gliss haircare products simulations were made of three budget levels for magazines –

in each case using magazines to prolong the advertising, i.e. running after the TV campaign had finished. The three scenarios were to invest in magazines (a) 29% of the amount invested in TV – the previous strategy; (b) reduce the magazine investment to 15% of TV's; and (c) increase the magazine investment to 65% of TV's.

The results for strategy (a) with magazines receiving 29% of the amount invested in TV are shown in Figure 101. TV was assumed to run from week 2 to week 4 (green portion of chart in those weeks). The effect of TV decays over the following weeks (the green and blue portions from week 4 onwards). Magazine advertising was assumed to be introduced during weeks 8 and 9, and again in weeks 13 and 14 (turquoise and blue portions). The effect of magazine advertising decays too, but lasts until week 25. The sales effect was indexed at 105, overall campaign ROI was indexed as 100, and the budget was indexed as 129 (100 TV + 29 magazines).

Strategy (b) with reduced magazine investment is shown in Figure 102. For magazines there is only one burst, in weeks 8 and 9. Campaign ROI is reduced to an index of 92, and sales effect falls to 86.

Strategy (c), which increases magazine investment to 65% of the expenditure in TV, introduces magazine advertising in week 6 (modest overlap with TV) but the main magazine coverage runs over a number of weeks, through to week 17 (Figure 103). By week 25 the effect of TV advertising has decayed to zero but magazine advertising is still having a measurable effect, and it will continue for many more weeks in a long tail (whose benefit is omitted from the ROI calculations). Campaign ROI remains at 100: the extra investment in magazines has not reduced ROI, showing that magazine investment had not reached its point of diminishing returns because of the way it was flighted, even when given 65% as much investment as placed in TV. Crucially, this strategy pushed the index of sales effect up to 134, a very worthwhile increase on the figure of 105 for the first media strategy.

While there would obviously be variations in the results for other brands, product fields and countries, the general principle is a sound one: campaigns dominated by TV advertising could be under-investing in magazine advertising. Even investing in magazines with a sum equivalent to two-thirds of the TV budget may not be too much if flighted efficiently.

Further examples of Ohal's work for Henkel are given in the next chapter, which is devoted to econometric modelling. The main conclusions reached in those examples were:

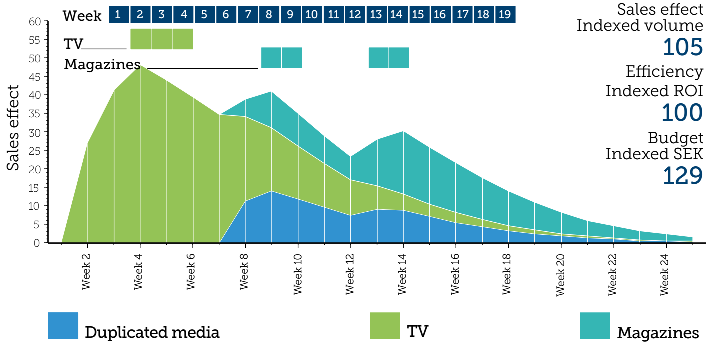
- The effectiveness of flyers (such as money-off leaflets) was greatest when used at the same time as magazine advertising;
- Per exposure, magazines are on average 2.5 times more effective than TV at building purchase intention for Schwarzkopf's more established products;
- The best flighting of magazine advertising for Schwarzkopf Gliss was to avoid overlapping with heavy bursts of TV, but using magazines to prolong the campaign afterwards, especially splitting it into more than one burst.

The ROI relationships between media will vary from case to case; individual econometric analyses is needed to establish the figures for a brand in a particular set of circumstances. What the Henkel experience indicates is that magazines can outperform TV and other media, and deserve serious consideration for most brands.

It also shows that magazine advertising helps to reinforce and prolong the sales effects of TV ads.

FIG 101. SCENARIO PLANNING FOR GLISS

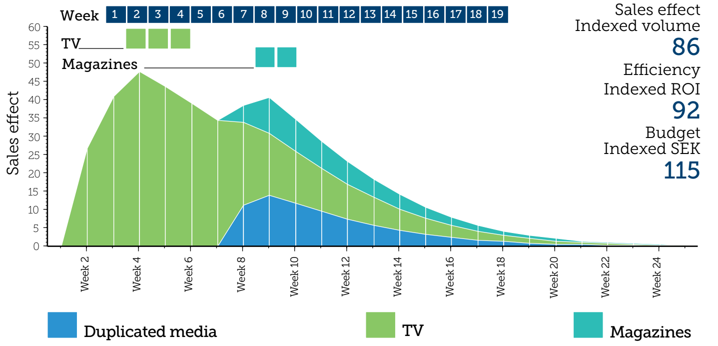
Magazine investment at 29% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20, 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

FIG 102. SCENARIO PLANNING FOR GLISS

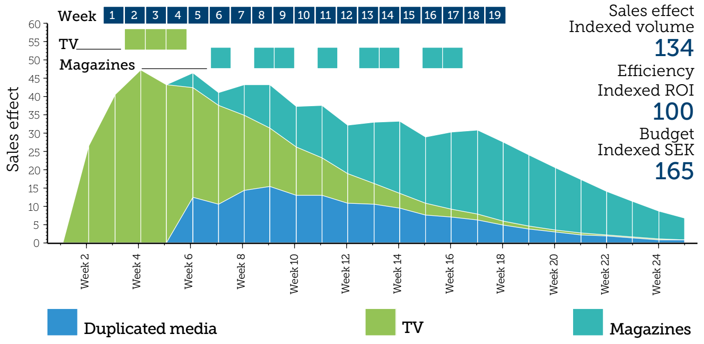
Magazine investment cut to 15% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20, 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

FIG 103. SCENARIO PLANNING FOR GLISS

Magazine investment increased to 65% of TV investment



Based on weekly sales of Gliss shampoo, conditioner & treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011

The three Ohal scenarios for Henkel were to invest in magazines (a) 29% of the amount invested in TV – the previous strategy; (b) reduce the magazine investment to 15% of TV's; and (c) increase the magazine investment to 65% of TV's

THE HENKEL REPORT: WHAT THEY SAID...

It was a great insight for us, on how to optimise the usage of magazines and TV in combination with other sales driving activities. We want complete solutions that have a stronger impact, so we will work with more integrated print co-operations in the future."

Catarina Tosic, Group Brand Manager, Henkel Sweden

"We can measure an increased sales effect from magazine advertising for as long as two months after the TV campaign has ended."

Roland Mathiasson, Director, Ohal

"For a client who has decided on TV advertising, and is considering adding magazines, this could well prove to be the tipping point. Now we have proof that magazine advertising [as well as TV] has sales effects."

Eva Westeson, Henkel account director at MEC.

Magazines lead in pan-European study of ROI by media

BrandScience, a global network of business analysts, has aggregated the results of its econometric studies of more than 500 real-life advertising campaigns throughout Europe. The report, *Measuring the effectiveness of print media in an integrated media plan*, was published jointly by BrandScience and Print Power of Belgium in 2014 [109]. It included campaigns from 13 European countries. ROI was defined as the average value of the sales generated by each euro spent on advertising, medium by medium.

One form of analysis was to calculate ROI for each medium by product categories. Figure 104 shows three pan-Europe examples: the total fmcg (fast moving consumer goods) category; the food & drink category; and technology services.

In total fmcg, cinema is outstanding, while magazines are comfortably in second place, well ahead of TV among others. In food & drink, and in technology, magazines yielded the highest ROI. Looking across the other product categories shown in the report, there were variations in the rankings but always magazines were amongst the highest ROI figures, and usually ahead of TV.

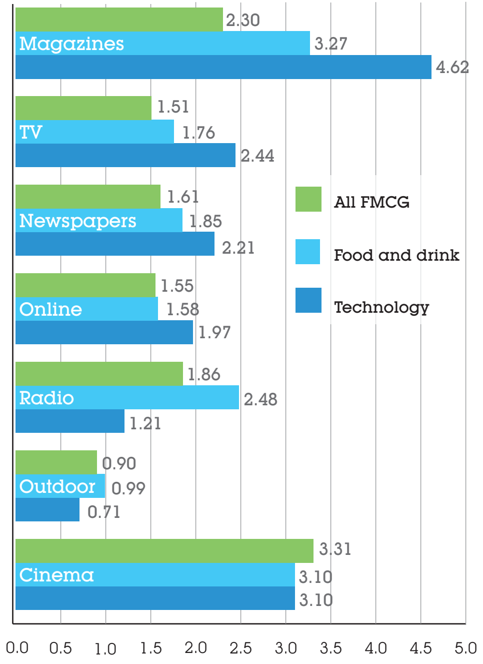
The report not only demonstrates that magazines are one of the most cost-effective media in generating sales of all product and service types, but also that more expenditure in magazines is better than less. Among all Services categories, for example, campaigns were divided into the third with the lowest proportion of budgets spent in magazines, the middle third, and the third with the highest proportions in magazines. As Figure 105 shows, spending less than 2%of the budget in magazines does not take full advantage of magazines' potential contribution, for it is more beneficial to raise the proportion to 4% or above. The higher the proportion of budget spent in magazines, the higher the return on investment.

Following up this idea, BrandScience modelled the optimum budget allocation between media, for fmcg products across the 13 European countries, and compared it with the actual average allocation (Figure 106). Whereas 10% of fmcg budgets were spent in magazines on average, the optimum allocated 28% to magazines.

BrandScience were also able to show that

Fig 104. **MEDIA EFFECTIVENESS:**Europe

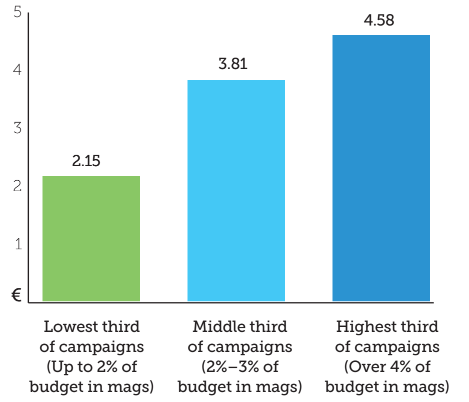
ROI: extra sales generated per €1 of adspend



Source: Effectiveness of Media, BrandScience/Print Power, Belgium, 2014

Fig 105. **MAGAZINE ROI BY PROPORTION OF TOTAL BUDGET**

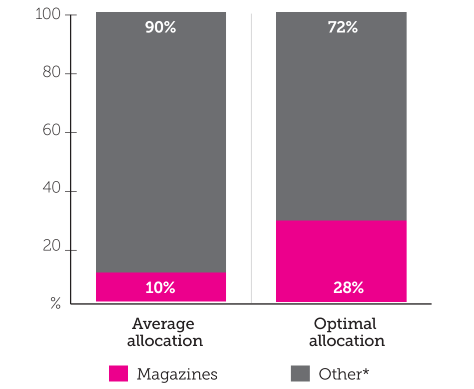
Product category: Services. Europe



Source: Effectiveness of Media, BrandScience/Print Power, Belgium, 2014

Fig 106. **OPTIMISING THE BUDGET ALLOCATION**

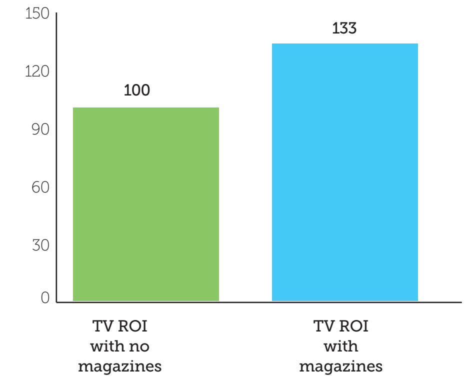
Product category: FMCG. Europe



*Source: Effectiveness of Media, BrandScience/Print Power, Belgium, 2014. *Other media: principally television, online and newspapers.*

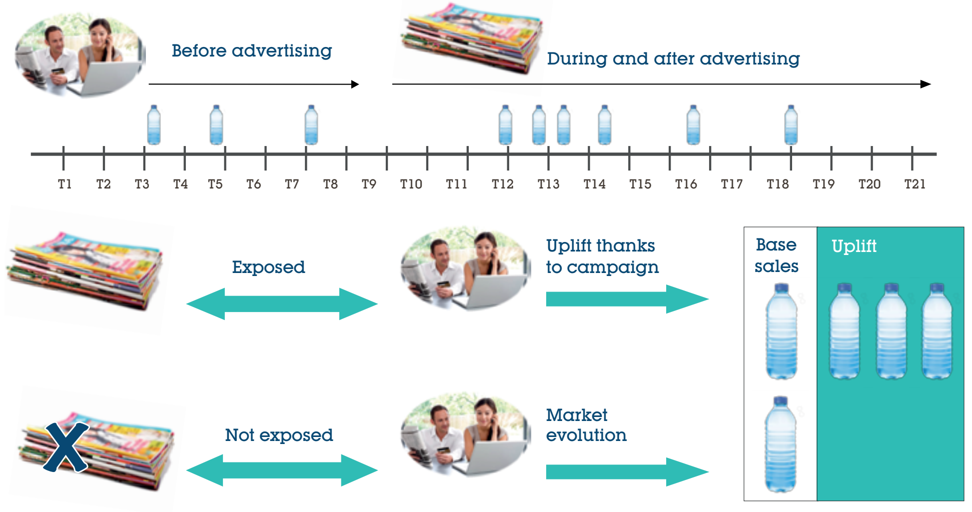
Fig 107. **MAGAZINES' EFFECT ON TV EFFECTIVENESS**

Product category: FMCG. UK



Source: Effectiveness of Media, BrandScience/Print Power, Belgium, 2014

Fig 108. **TRACKING HOUSEHOLD PURCHASES AND MEDIA OVER TIME**



Source: GfK Household Panel, Sanoma, Belgium/Netherlands, 2012

when magazines are added to FMCG campaigns using TV, the performance of TV advertising itself is significantly improved.

Figure 107 shows the situation in the UK. The ROI for TV when there were no magazines in the campaigns was indexed at 100. For campaigns which included magazines, *television's* ROI increased by one third on average. This is an instance of the multiplier effect referred to previously, whereby magazines not only yield a high return on investment but also make television work harder and more effectively.

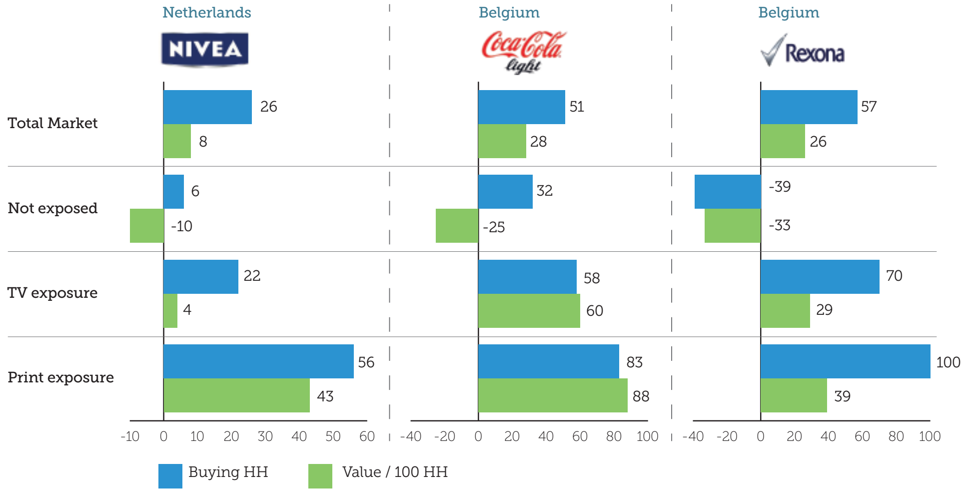
High magazine ROI: Belgium and Netherlands

The publisher Sanoma commissioned the research institute GfK to analyse its household purchasing panel data in Belgium and The Netherlands to investigate which medium contributes the most to creating sales. The results were presented as *The sales effects of magazine advertising* in 2013 [110].

GfK's panel provides continuous single-source data on purchase behaviour and media consumption. Households could therefore be followed over time to track sales uplifts, which could be cross-analysed against media (Figure 108). Those exposed to the ads in a medium (in the illustration it is magazines) were compared with a matched control group of those not exposed, to measure the additional sales induced by the advertising.

Three brands were studied: Nivea in The Netherlands, and Coca-Cola Light and Rexona in Belgium. Figure 109 gives the statistics. For each brand, data are shown for the short-term sales evolution (one month compared with the preceding month) for the total market, households not exposed to the TV or magazine advertising, those exposed to TV, and those seeing the magazines. Shown in each of these cells in the table are the sales uplift in terms of

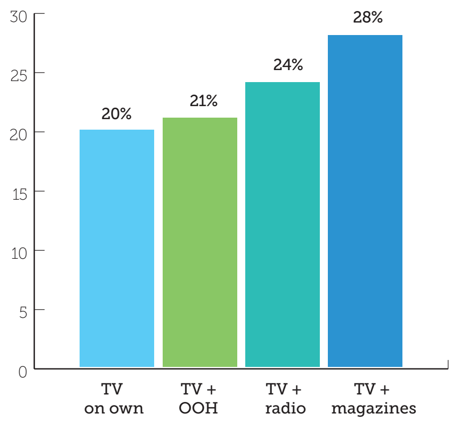
Fig 109. **SHORT TERM EFFECT: MONTH BY MONTH SALES UPLIFTS**



Source: GfK Household Panel, Sanoma, Belgium/Netherlands, 2012

Fig 110. **BEST ADDITION TO TV IS MAGAZINES**

Average sales uplifts of media mixes



Source: GfK Media Efficiency Panel, Europe, 2013

the number of buying households, and the sales value per hundred households.

In the total market, for all three products the sales grew, both in terms of buying households and the spend per household.

The households that were not exposed to the campaign at all, however, showed below-average growth in number of buying households (and a reduction for Rexona), and reduced spend per buying household.

Households seeing the TV advertising reacted positively to it, with much better results than among the non-exposed households. The best effect of all was among the households exposed to the magazine advertising. Recruitment to each of the products grew very substantially (doubling in the case of Rexona) and the spend per household grew very considerably too.

The conclusion is that magazine advertising can boost short-term sales very effectively.

In a separate analysis for Sanoma reported in *The sales effects of magazine advertising*, GfK calculated benchmarks for sales uplifts achieved by TV on its own and when other media were added to the campaigns (Figure 110). The information came from GfK's *Media Efficiency Panel* [111], which draws on household panel results from several European countries, and covers a very large number of brands.

The benchmarks showed that it was always beneficial to include another medium to work alongside TV. Among the benchmarked media, it was magazines which complemented TV the best, adding the greatest value.

A further analysis in The Netherlands using the GfK household panel was presented by Magazines.nl/NUV in 2014 under the title *Print Works* [112]. GfK tracked the sales, media exposure and ad expenditure of campaigns for ten brands (shown here).

Aggregating across the ten brands, the two print media yielded the highest pay-back on the advertising investment (Figure 111). In index form, magazines (130) and newspapers (120) led online (110) and radio (90), with TV (60) trailing as the least cost-effective of the five media for these ten brands. Compared with television, magazine advertising produced more than twice the sales per euro of adspend.

Magazine print and websites make TV more effective

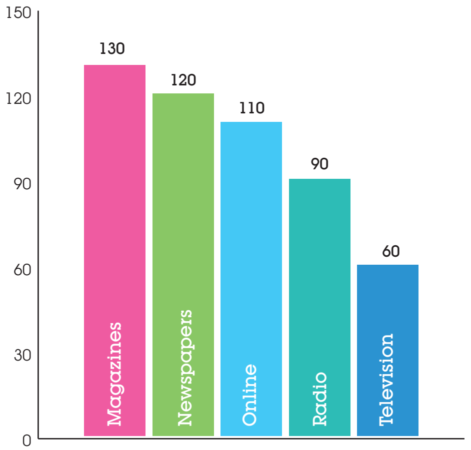
The *Cross Platform Sales Impact* case study commissioned by Time Inc in the USA, and conducted by Nielsen Catalina Solutions [113], showed how adding print magazines and their associated websites to a TV campaign can increase the campaign's return on investment significantly.

Two food brands ran a linked campaign in television and in Time Inc magazines and their websites, for seven months ending April 2013. Nielsen tracked media exposure and sales, and through econometric analysis isolated the contributions to sales made by each medium.

The incremental dollar sales (ROI) which Nielsen calculated for the Time Inc print+digital properties was $3.14, and for TV it was $3.89. However the effect of combining the two media produced an overall campaign ROI of $5.10, higher than that of either of the media on their own. The addition of magazine media not only made a print+digital contribution but also made the TV advertising work more effectively.

Nielsen concluded that it was an example of the strong synergy produced by combining these media. The special attributes of magazine media (print and websites) combined with those of television to multiply the communication and persuasion achieved. Consumer response is better when the messages are experienced in a varied range of media.

Fig 111. **PRINT HAS HIGHEST ROI FOR 10 DUTCH BRANDS**



Source: GfK Meta study, Magazines.nl, The Netherlands, 2014

It's global: magazines can boost sales

Print can boost sales in both the very short term (as demonstrated in the Belgian and Dutch evidence) and in the longer term during and after a complete campaign period. This is proven in many countries and across continents, and it is fair to say that it is global.

Because magazines are a targeted medium, an advertiser's selection of appropriate magazines means targeting exactly the right consumers. Since the targeting, combined with the nature of print, also means deep reader engagement, the advertising reaches the right people in a receptive frame of mind. This is at the heart of why magazine media advertising is so effective.

It also appears to be the case that many large-budget advertisers spend too much of their budgets on TV (beyond the point of severe diminishing returns), when the marginal portion of that budget would be better spent in complementary media – among which magazine media are particularly effective.

In addition to the studies quoted in this chapter, there are many more which reach the same conclusions. These include a range of *Dynamic Logic/Millward Brown Cross Media Studies*; meta analyses by *Marketing Evolution*; *Sales Uncovered* by the PPA; and many more. Some of these are summarised in the first edition of *Proof of Performance*, and others appear in the further references listed at [104]. ❤

> "Crossmedia contacts produce a higher contact intensity and therefore boost the engagement of the customers with a brand and its products"
>
> G+J Crossmedia Success Barometer, G+J, Germany, 2014 [105]

[9] CAMPAIGN EFFECTIVENESS: SALES

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10

ECONOMETRIC MODELS AND MEDIA EFFECTIVENESS

- Econometric modelling is increasingly used for guiding media strategy decisions.
- Magazines can benefit, yielding very competitive figures for return on investment, providing the right inputs are used.
- This includes weekly ratings and readership accumulation data.
- Without these two elements, the return on investment in magazines is liable to be underestimated by around a fifth or more.
- It is also vital to have a process for making it easy for modellers to feed the relevant magazine information directly into their models.

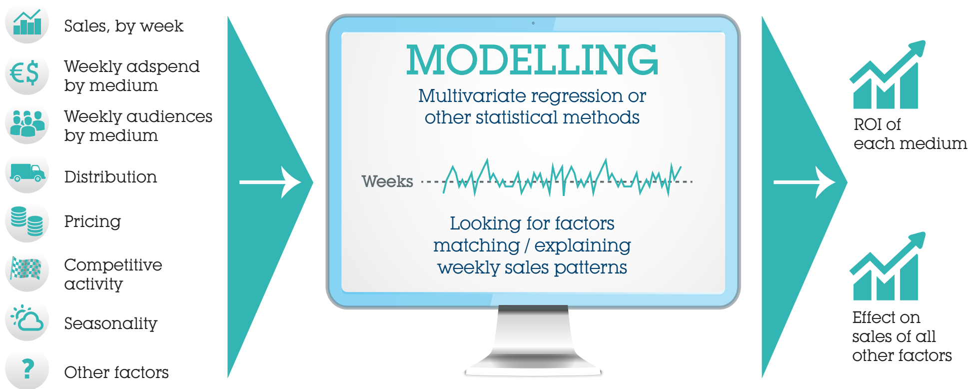
ECONOMETRIC MODELLING can be a great friend to magazine media. It can identify in a quantified form the best ways of using magazines for each specific advertiser. From this emerges statistical proof of the strengths and effectiveness of magazines. The results of modelling can help change attitudes towards magazine media, in a positive direction, showing in fresh ways the medium's power. But to achieve this it is imperative that appropriate data on magazines is fed into the models.

Increasingly, advertisers' strategic media decisions are being guided by econometric modelling of a brand's historic performance data, to judge the effectiveness of each medium that was used. In many countries the majority of campaigns with large budgets are assessed in this way, driven by the need for accountability of every element of marketing expenditure.

For magazine publishers it is vital that the medium's return on investment is calculated in a way which reflects its true power, relative to television, the internet, newspapers, radio, promotions and other ways of spending marketing money. Unfortunately magazines are sometimes treated in a manner which puts the medium at an unwarranted disadvantage.

In addition to illustrating the positive outcomes for magazines of modelling, this chapter reviews what the problems are, what can be done about it, and the importance of publishers questioning existing modelling methods.

FIG 112. **ECONOMETRIC MODELLING OF MEDIA ROI**



What is econometric modelling?

As applied to marketing, econometric modelling is a form of statistical analysis which estimates the contribution made by each element of a brand's marketing to the observed changes in sales (or other criterion).

In the context of media strategy, econometrics involves analysing detailed data on:

» The variable which the campaign is trying to maximise – usually but not always sales. This is the 'dependent variable'.
» Advertising expenditure in each of the media used in recent past campaigns
» Audience achievement for each medium
» A host of other factors which may have an influence, such as distribution changes, promotions, competitive activity, seasonality, relevant macro-economic factors, and so on

The timescales during which each of these factors occurred. For media, this means the flighting of the advertising.

Econometric modelling uses statistical techniques such as multivariate regression to find out the contribution made by each of these factors in determining the values observed in the dependent variable – for instance, each factors' impact on sales.

Such modelling is especially suitable for separating the effects of each medium. This is usually summarised by calculating an overall return on investment (ROI) for each medium. In addition to this, modelling can be used to investigate more detailed media questions.

A study, reported in the paper *Magazines & Media Mix Models: Prescription For Success* by David Shiffman and others [115], interviewed modelling companies in the USA. They asked why are media mix models utilized. It is to:

» Determine overall marketing/campaign effectiveness and in particular the relative effectiveness of each element of the plan.
» Justify total marketing/advertising investment (overall and by channel) to senior management (increased need to justify in current economic climate).
» Determine optimum media mix as a basis for future campaigns.
» Establish optimum spend, weight levels & scheduling tactics to guide future investments.
» Assess the contribution and ROI of individual elements (specific magazines or genres, for example) of the media channel, provided that weight levels are sufficient to allow for measurement.

ECONOMETRICS EXPLAINED

From Louise Cook and Mike Holmes booklet *Econometrics Explained,* written for the IPA in the **UK** [114]:

"Econometric analysis offers... a means by which to test hypotheses... We can use econometrics to test whether these are upheld by the available data. For example:

- press vs television vs other media
- burst vs drip
- by time of year (media cost and relative effectiveness may be issues)
- relative to previous activity (recency)
- what are the most effective coverage or frequency levels?
- are particular weights of advertising more effective?

"Media tests may be conducted to explore issues like changes in advertising weight, campaign or media flighting. Econometrics can be used to quantify the effects of these tests and to provide confidence intervals for those estimates."

"Magazine publishers need to have an understanding of why advertisers use econometrics – and its potential shortcomings – if they are to make a case for the medium."

Jim Jarrett & Marcos Pereira, Mindshare UK

Five problems for magazine media

Needless to say, it is crucial for the magazine medium that the best available information on its audience achievements are used in the modelling process. If important types of data are missing, the effectiveness of the medium is very likely to be under-estimated, resulting in an unwarranted loss of advertising revenue.

In their paper *Magazines And Econometrics*, written for FIPP in 2012, Jim Jarrett and Marcos Pereira of Mindshare UK [116] listed five problem areas that affect magazines:

1. Modelling is a backward focused science, since you can only see what's happened in the past as a predictor of the future. As such, it may inherently encourage advertisers to *stick with what they know* in media evaluation, and may discourage introducing channels not previously used.

2. As part of the process of modelling, one of the stages is to identify which variables are most influential in affecting the model so that the number of variables can be rationalized and reduced. Variables that have low explanatory power may be dropped because they can't be proven, statistically at least, to be making a contribution to the model. For a medium which is often comparatively low weight, such as magazines, this can too often be the case.

3. If too much is going on at once, for instance a significant advertising activity is under way, it can be difficult to discern the contribution of individual elements to the overall campaign. Consequently the heaviest weight activity, usually TV, may gain the attribution at the expense of other media. This can do a disservice to magazines.

4. The attribution of channel response to 'press' – the aggregation of magazines and newspapers to a single medium. This can have both positive as well as negative implications: aggregating together makes both media bigger and reduces the 'small media' effect. The contrary situation is that their individual contributions are not recognized; in particular, magazines' unique contributions may be misattributed.

5. Perhaps the biggest obstacle which magazines face is that magazine exposures may be misallocated by the modeller. We know from the *NRS Readership Accumulation Study* [23] that publications accumulate their readership over time, and that different publications accumulate over different periods of time. Though we know this, all too often it is easy for the modeller to overlook and assume for the purposes for modelling that all readership or GRPs are attributed in the week in which the title is published (since at an aggregate level the GRPs are correct).

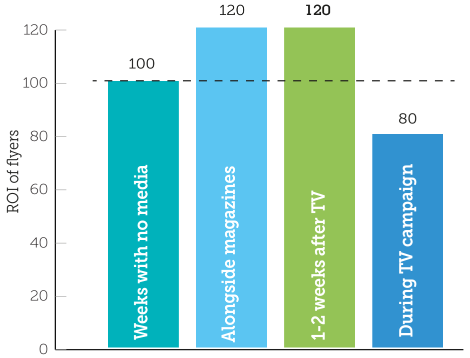
This is a good deal easier than the effort required to input the magazine insertions into a print planning tool and then have that distribute the GRPs correctly. This step can be quite time-consuming and only really affects magazines since daily newspapers' GRPs are largely delivered in the week in which they are published.

If misallocation is done, the effects of this are that magazine GRPs are concentrated in the on-sale weeks. In a crude example, sales effects may be attributed only in the week of the on-sale date, not in any subsequent weeks, making the contribution of magazines look more expensive than it really is, compared to other media."

FIG 113. **EXAMPLE OF MODELLING IN PRACTICE (1):**

Gliss haircare products, Sweden

Q: When to use Gliss flyers (e.g. money-off coupons)? A: Alongside magazine advertising, or 1-2 weeks after TV



Based on weekly sales of Gliss shampoo, conditioner and treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2011 [108]

Distributing magazine exposures through time

That fifth point, about readership accumulation, is a priority for magazine publishers to do something about.

Chapter 2 has already described the way that magazines accumulate their readerships. It takes place over time. The chapter gives examples of accumulation curves for readers' *first* exposure to an issue (Figures 12-14). Second and any subsequent exposures, due to multiple pick-ups, obviously occur slightly later. Chapter 2 also gives, in Figure 15, an example of the distribution through time of an issue's *total* exposures: each reader's first exposure (the usual meaning of an accumulation curve) and all subsequent exposures for each reader which arise from those multiple pick-ups. Repeat reading extends the duration of magazines' delivery of ad exposures.

When doing modelling, if all exposures delivered by a specific issue of a magazine are allocated to the on-sale day or week, a significant portion of the true relationship between magazine exposures and the sales of the advertised brand would be destroyed. Modelling depends on matching patterns – usually the weekly patterns of sales and the weekly patterns of ad exposure to each individual medium. If magazines' weekly pattern is distorted, it means that the link between the two is diluted. Put another way, the medium's ROI will be under-estimated. On top of that, the ROI of other media will be over-estimated (magazines' missing ROI will be distributed instead across the other media), thus further reducing magazines' relative position.

Magazine ROI misread by a fifth

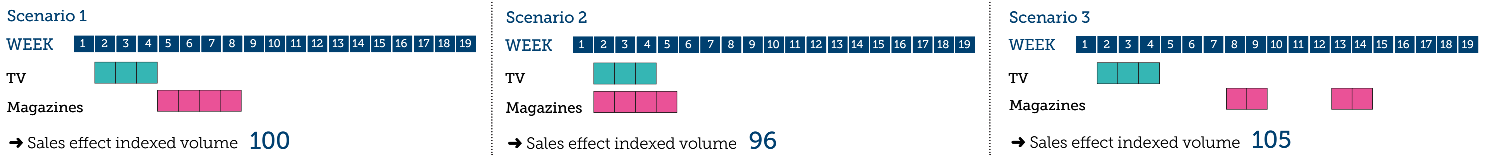
As part of the Magonomics project [102], Mindshare/Ohal investigated the effect on magazines' ROI of not using readership accumulation data. Taking five real-life multi-media fmcg campaigns, magazine ROI was calculated on two alternative bases: using accumulation data, allowing readership to build over time; and without this accumulation data, allocating all magazine readership to the week of publication. The differences were startling. For all five campaigns, magazine ROI was under-estimated when accumulation was not used. The average was an under-estimation of 19%.

A similar level was reported in the American paper *Magazines & Media Mix Models: Prescription For Success* by David Shiffman and others [115]. It described building an econometric sales model and experimenting by varying the inputs for magazines. Sales data were entered into the model week by week. Magazine readership

FIG 114. **EXAMPLE OF MODELLING IN PRACTICE** (2): GLISS HAIRCARE PRODUCTS, SWEDEN

Q: When to flight Gliss magazine advertising? A: In 2 bursts after TV advertising

At constant ad expenditure



Based on weekly sales of Gliss shampoo, conditioner and treatment products, week 41 2009 to week 20 2011. Source: Ohal econometric modelling and scenario testing for Schwarzkopf, Sweden, 2011 [108]

data in the form of gross rating points (GRPs) were entered in two ways: allocating all of a month's GRPs into the first week of the month (a rough approximation to saying all of a monthly's readership occurs in the first week of publication); and

"We now have evidence that properly converting magazine activity to [weekly] GRPs is worth the effort."

Douglas Scott,
Millward Brown, USA

spreading the month's GRPs week by week through the month – a more realistic pattern.

The result of the test was that the more realistic week by week distribution of magazine GRPs increased the medium's reported effectiveness (ROI) by 18%.

An improvement in ROI of about a fifth is quite sufficient to alter media choice decisions in many instances. Moreover the experiment did not fully replicate the true distribution of magazine exposures week by week. Allocating a monthly magazine's total GRPs across a whole month is much better than all going into the first week, but spreading those GRPs across a longer period in full accordance with readership accumulation curves would be even better, and can be expected to produce an even closer alignment of magazine exposures with sales. Therefore the measured 18% improvement may itself be an under-estimate of the impact of using readership accumulation data.

The paper's authors summarised by saying "The benefits of weekly GRPs are: best aligns with sales inputs; provides better variability in data, an important driver in a model's ability to measure volume contributions; increases likelihood of measuring individual elements within the print campaign; and more accurate representation of media weight distribution."

On the wider implications, the authors concluded "The examples paint a clear picture that improper print data inputs greatly undervalues the impact that this medium has on a brand's business results; extrapolating this out to the marketplace at large, less-than-ideal inputs for print minimizes the perceived overall contribution, value and importance of print advertising in the total marketplace. The implications of this are significant - improper input for print underestimates its impact and overstates the impact of other channels, which can lead to less than optimal allocation of advertising budgets."

The paper's findings were matched by another investigation in the USA , reported in the paper *Better Representing Magazine Effects in Marketing Mix Models* by Mark Reggimenti and others [117]. They used econometric modelling to test six brands, using three key performance indicators (KPIs): positive buzz, positive impression of brand, and willingness to recommend. Aggregating across all six brands, the reported effectiveness of magazine advertising was substantially higher when readership accumulation data were employed in the models than when they were not. The improvement averaged 20% or greater on all three KPIs.

In some instances modellers use ad expenditure as a proxy for magazine audience inputs. This is even worse than using magazine GRPs and putting them all into the on-sale week. In the USA Millward Brown, a research company employed by many major advertisers for conducting media modelling, re-analysed a series of existing modelling studies to see how results were affected by using dollars instead of weekly GRPs to represent magazine inputs [118]. When using dollars, they are typically allocated to a magazine issue's on-sale date. The result of the comparison was that the use of dollars captured only one third of the real weeks that were supported by magazine advertising, and it reported (falsely) very wide variations in magazine activity week by week. This in turn will heavily under-estimate the real relationship between magazine investment and sales or other KPIs.

"In some cases the labour-intensity of generating optimal inputs [for magazines] is a barrier to implementing best practices" in modelling.

MPA's guide Marketing Mix Modelling & Media Inputs, USA, 2010 [119]

The *Magazines & Media Mix Models: Prescription For Success* study was another to show that the use of ad dollars under-estimated magazines' contribution even more severely than using GRPs allocated to the week of publication.

Why is accumulation data commonly not used?

Since readership accumulation data is so important in revealing the value of magazine advertising, why is it commonly not used? The main reasons appear to be lack of knowledge of its importance, or even its existence, and the amount of labour-intensive time-consuming work that may be required to apply it.

Jarrett & Pereira wrote, concerning **the UK**, "Though modellers try to be robust, it is a question of modeller knowledge (that magazines behave in this way) and time (will it make any significant difference to the overall strength of the model when I present it to my client). The correct estimation of magazine GRPs can be one of the most time-consuming and manual stages in the modelling process. For what may be comparatively low weight media, it may seem more effort than it is worth."

In the USA the media and marketing consultancy Sequent Partners, on behalf of GfK MRI, conducted interviews among modellers, advertisers and media agencies [120]. One of the executives at a media modeller company explained why the data on magazines which goes into media models is often poor, and excludes readership accumulation: “What often happens is that a very junior person at the media agency, who doesn’t necessarily know what they are doing, pulls the data.”

What can be done about it?

There are three key things magazine publishers can do:

- » Convert readership data into the form of weekly ratings
- » Make it easy for modellers to input all the relevant magazine data
- » Ensure modellers understand the importance of building readership accumulation data into media mix models

Each is discussed in turn.

1. Convert readership data into weekly ratings

The inputs required by media planning econometric models were originally designed to handle week by week data: typically, advertisers’ weekly sales data, and weekly audience reach and frequency delivery for television and radio. Now internet audience estimates can easily be consolidated on a weekly basis, and readership estimates for daily newspapers can be fitted into a week by week pattern without much difficulty.

Magazines however are at a significant disadvantage here because magazine readership data are traditionally based, for good reasons, on average issues; the publication intervals for most magazines are longer than one week; and audiences take time to build up, over periods much longer than a week. While these factors can be benefits in terms of developing strong relationships with readers, and permitting re-reading and several other advantageous attributes of the medium, they are a real handicap for mixed-media modelling which wants weekly data.

The models rely on pattern recognition in which weekly fluctuations in sales (or other target outcomes) are compared with weekly variations in each of the marketing elements, including audience delivery of each advertising medium used. The closer that a medium’s weekly audience delivery matches the weekly sales pattern, the stronger the incremental sales effects which are attributed to that medium.

Conversely a medium for which audience data is presented as monthly data, attributed to say the first week of each month, will never match the weekly sales pattern very closely, even if in reality the true weekly audiences did conform closely to sales. Consequently the medium’s return on investment will always be underestimated.

One of the most promising attempts to produce a real-time flow of weekly audience data for magazines is the *Magazine Audience Performance Predictor (MAPP*, sometimes written as *mapp*) in Australia [121]. It has been developed by several publishers working through their professional body Magazine Publishers of Australia (MPA).

It predicts, for each specific issue of each magazine, week by week audiences, taking account of the relevant rate of accumulation through time. The audience forecast is calculated shortly after publication of the issue, and before much of this reading has actually taken place.

It uses scan-based sales data covering the first week of publication of each issue of a magazine. A formula has been devised which has proved very successful in projecting an issue’s first week sales to create a good estimate of final readership numbers.

Each Monday the computer services bureau Quantium uses the latest weekly scanned sales data and other inputs to calculate audience estimates for current and recent specific issues of all 31 magazines in the system. This makes it possible to estimate week by week audiences (as gross ratings points) delivered by any campaign using any of these titles, incorporating readership accumulation. Very importantly, it can export data in the required format for agencies and advertisers to use in their own econometric models.

As MPA says, “MAPP raises the level of conversation magazines can now have with advertisers and agencies”.

A quite different approach is the virtual diary developed by Bucknull & Masson of UK & Belgium, for the market in Sweden [122].

It involves a readership diary panel, which takes account of the time dimension (readership of an issue building up through time), repeat reading and its timing, and the variability of readership issue by issue. Survey data on other media are integrated into the virtual diary. The magazine and other data can be easily input into agency modeller’s campaign analyses, giving the medium a fair hearing when strategic media choices are being evaluated.

2. Make it easy for modellers to input all relevant magazine data

The process of inputting high-quality magazine data into models should be automated as far as possible. For example in America, GfK MRI has developed a syndicated product called *Granularity* [120] which is able to translate magazine insertion schedules into weekly ad exposure estimates, and deliver them to modellers in an easy-to-use form via a web portal. In Australia, *MAPP* can produce model-ready magazine campaign data.

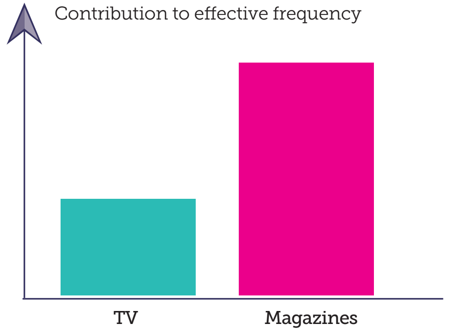
Where this kind of arrangement does not already exist, magazine publishers are in a position to work with the providers of competitive media schedules (in many countries this is Nielsen) and print planning systems (such as Telmar and IMS, among others) to automate the process. That is, exporting magazine schedules into the print planning software for the calculation of the correct week by week gross rating points (taking account of the accumulation of readership through time), and exporting those results directly into the agency’s media mix modelling.

FIG 115. **EXAMPLE OF MODELLING IN PRACTICE** (3):

Schwarzkopf’s established products, Sweden

Q: Compare TV and magazines for creating purchase intention

A: Magazines are more effective than TV



Source: Ohal econometric modelling for Schwarzkopf, Sweden, 2012 [108]

> “We must have accurate and comprehensive measures of ad exposure. There is a lot on the line, as inaccurate measurement can lead to totally the wrong judgement about what parts of the marketing mix work.”
>
> Joel Rubinson, Advertising Research Foundation, USA

3. Ensure modellers understand the importance of building readership accumulation data into media mix models

Where the steps in 2) above do not exist, it is vital to ensure that agencies and their modelling teams are aware of the importance of building readership accumulation into their media mix models when print magazines are being used (magazine digital properties don't have this problem).

Additional information for modelling

It would further help magazines to prove their value on mixed media schedules if certain other kinds of data were included in the models – data which goes beyond readership and describes magazine's performance in more detailed and accurate ways.

One example is ad noting scores, to enable the models to evaluate ad impact rather than mere 'opportunities to see'. A new development here is that at the time of writing the Dutch readership survey NOM [32] is about to publish for the first time their Opportunity To See Advertising (OTSA) data (described in Chapter 3) making it available in the media planning software, usable alongside the average-issue readership figures. It is positioned as a prediction model rather than currency – a model which gives users a new insight into the performance of print.

Other streams of regular information that would be fruitful include figures on weekly reach to complement weekly GRPs; measures of engagement; and information on actions taken. Specific-issue readership, which measures the variation in readership of a magazine from one issue to the next, would also help (as Australia's MAPP is doing). Taking account of repeat reading would make a difference – allowing that the average magazine ad is looked at more than once, and that (by definition) the second and subsequent exposures occur over a longer period of time than the first exposure.

In general, what is needed is any types of information which provide a more precise, accurate and detailed description of how magazine advertising has worked within a particular campaign, week by week. This is what will give the medium its best chance of showing a strong relationship between the investment in magazines and the advertiser's weekly sales or other key performance indicators. It will maximise the medium's reported return on investment, taking it closer to what is actually achieved, instead of leaving it under-estimated. ❤

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● **Additional information for modelling**

ABOUT FIPP

FIPP is dedicated to helping our members develop better strategies and build better media businesses by identifying and communicating emerging trends, sharing knowledge, and improving skills worldwide.

Our membership network includes more than 700 media companies from more than 60 countries, representing 6,000 leading media brands worldwide – across print, web, mobile, tablet and live event platforms.

Through our unique global network, we are ideally placed to support members in the development of their multi-platform strategies and building of global relationships. As a not-for-profit organisation, FIPP invests its proceeds back into the industry, meaning our members continuously benefit from their association with FIPP.

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He has many years' experience of consumer magazines, business magazines and national newspapers – in various roles within major publishing houses; as media group director in advertising agencies; and as a consultant.

Guy is an experienced conference speaker, and is author of a number of books, including the first edition of *Proof of Performance*, and five editions of the UK PPA's *How Magazine Advertising Works*.

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magazines for
interactive content

ENGAGE

and track audience
through data analytics

GENDER

TOTAL VIEWS

GENDER	TOTAL VIEWS	PAGE SCANS	SESSION TIME
Female	24,236	5,603	06:02
total	58,990	16,490	04:32

DWELL TIME

AGE

AGE GROUP	TOTAL VIEWS	PAGE SCANS	SESSION TIME
unlisted	34,754	10,887	03:53
18-24	5,369	1,171	03:03
25-34	11,714	3,096	05:21
34-44			
45-54			

LOCATION

NO:	CITY	TOTAL VIEWS	PAGE SCANS	SESSION TIME
1	unknown region	11,557	3,968	03:14
2	Sao Paulo	4,249	1,863	04:00
	Brasilisa	4,164	1,559	04:14
	Rio De Janerio	3,148	1,042	01:59
	Curibiba	3,1		
	Fortalera	2,1		
7	Santos	2,0		
8	Campina	1,0		
9	Casias Do Sul	1,0		
10	Jalia Perscas	9		
11	Cruraíro	9		
12	Salvador	9		
13	Duque De Caxira	9		
14	Florianopolis	9		

SCANS

NO:	CITY	TOTAL VIEWS	PAGE SCANS	SESSION TIME
32	Vila Velha	563	108	01:23
33	Vinhedo	522	107	04:12
34	Campo Mourilo	519	106	02:35
35	Atibaia	463	106	01:04
36	Ribeirao Preto	416	107	01:16
37	Americana	415	104	01:30
38	Erechim	399	106	01:44
39	Fernandopolis	387	94	00:48
40	Jandira	345	94	01:19
41	Goiania	331	92	04:00
42	Jundiai	327	93	05:16
43	Natal	316	91	01:10
44	Maceio	302	90	02:56
45	Osasco	299	91	00:22
46	Franca	296	90	01:15
47	Pocos De Caldas	289	90	02:17
48	Almirante Tamandare	254	92	00:12

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