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9.1 Management uses of syndicated magazine audience research

Media research as practised by syndicated researchers in the US assumes the task of appraising the dollar value of the audiences of the measured media. The relative value of a unit of advertising is assessed by the buyer, and fixed by the seller, based upon a measured unit of audience and a known cost.

HISTORICAL PERSPECTIVE-TELEVISION

In syndicated broadcast research this measurement was of the essence from the beginning of commercial radio and television broadcasting. The coverage area of a broadcast signal was fixed by the regulation of the FCC (Federal Communications Commission) in the allocation of licences. The power, frequency, and band spectrum, combined with the topography of the market and conflicting signals, created a variably shaped and sized coverage area. The population of this area (or some political or marketing area common to a group of stations) became the 'circulation' of the station, often confused with 'able to receive'. Radio and television stations still depend on measures of which indivduals, and how many, can and do listen to or view their signals, on a county by county basis. Although this coverage or circulation measure can be technically defined by measures of signal strength, the measurement of *audience* is almost exclusively used for broadcast media planning and buying.

Broadcast circulation, however, is too broad and inclusive a measure for the assessment of an advertising audience value. A television station with 98% coverage of its 'Area of Dominant Influence' may achieve from zero to X% of this potential, depending on the daypart in which it is telecasting, and the attractiveness of the programming. For this reason, the station or programme rating (percent of the population) and its share of the viewing audience during the time period have become the basic unit of information. Cost per rating point, cost per thousand population and share of audience are today the economic units of broadcast buying and selling.

These measures of the broadcast audience were the logical and practical result of fitting information to the task. Radio and television became dominant media as their circulations or coverage areas grew by networking to encompass the whole of the population. The task of opportunistically buying network programmes or local market spots is then dependent on ever-changing sets in use, rating and share.

Today, television is still dependent on these measures. However, diary measurement of local market television is showing the strain of measuring the multiplicity of viewing opportunities presented by cable TV. Meter measurement once slow and cumbersome, is now instantaneous; but now there is talk of people meters. Yet the minute by minute measures of audience, sets-in-use, rating and share, are fit for purpose and consistent with the management and advertising sales need-to-know.

HISTORICAL PERSPECTIVE-RADIO

Radio media research in the US experienced a major transformation in the sixties. As television dominated the media consumption of the population in the fifties and sixties, radio changed from a programmed medium (as television remains today) whereby a few network stations dominated a market, and, by networking, created a national audience. But in the fifties, the distribution of radio audience over many, rather than few stations, and over the FM as well as the AM band, severely taxed the meter measurement of radio. The replacement of time segmented programming by radio formats (for example, classical, news, contemporary, etc.) created further deficiencies in programme recall measures collected via personal interview. Radio had changed from a household medium to a personal one. Further, the survey area needed broader definition now that many stations competed for coverage or reach and frequency during broad dayparts. Rating, share and sets-in-use remained important, but the methodology had to change to measure the medium; and it did. Blanket personal diary surveys with broad market survey areas quickly replaced measures which were not so much deficient methodologically as they were irrelevant to the task.

In the case of both radio and television, syndicated research remains and is of the essence. It decides the fate of announcers, the selection of programmes, the economic viability of the station and the network. Share of audience is share of market. The recent growth of cable, particularly pay cable, may well require the

introduction of additional measures for evaluating the advertising value of the medium. And, broadcast management will watch and analyze the scene for sense and opportunity. I think we can be sure that as standard broadcast measures are developed, they will be in tune with the nature of the medium.

HISTORICAL PERSPECTIVE-MAGAZINES

Magazine media research, when it addressed itself to total audience, was unfortunately late, something of an afterthought. Magazine total audience surveys were a reaction to the national networking of radio in the '20s and '30s and television in the '50s and 60s.

In the sixties, Willard R. Simmons adapted a methodology first designed by *Life Magazine* for the measurement of mass circulation, highly graphic and short-lived magazines. The need was obvious. Television had obtained a tremendous circulation potential with near total saturation. And, in addition, TV had, on average, two plus viewers per set. Thus, magazine research was directed at the measurement of average issue audience as a complement to its audited circulation. Media researchers then looked to relate magazine average audience and average circulation to evaluate the medium. The managements of mass circulation magazines approved the researching of this unexploited advantage and the readers per copy function was established.

While this function had great significance to the media industry, it never made the same impact on the editorial and circulation departments of the print media. Even today, the price competitiveness of magazine advertising is based more directly on circulation than on audience.

THE SITUATION TODAY

And so, today, publishers are frustrated. Circulation people are disbelieving. Editors are annoyed. Yet RPC remains the valued result of expensive research conducted to assess the value of the magazine medium in the market place. Media researchers should question this simplistic dependence on readers per copy, and the ignorance of the wealth of information otherwise available to them.

HOW ARE MAGAZINES DIFFERENT?

Average audience of a magazine is a mean with no known or measured deviation. Average circulation is estimated from publisher information audited by ABC

for one issue per six month period, and furnished by publishers for the remainder of the issues. The average audience is believed to vary in a straight line relationship to circulation. (In fact, subsequent surveys, after radical changes in circulation, do not support this assumption.) Magazine copies collect readers in ways which have yet to be measured. Timothy Joyce's paper on this subject *(1)* remains a model for understanding the readers per copy function, but only laboratory type data have been available to test it.

My thesis is that syndicated magazine audience research has had little management use because the information has not been understood or applied in the context of magazine publishing as a business.

The essential differences
Before it is an advertising medium, a magazine is a physical product which must be artistically created, manufactured, distributed, and sustained as a business enterprise. The varying fortunes of magazines are based on the variation in the demand to buy or subscribe to the physical copy, the whereabouts of copies, and the related incidence of readership. And because the magazine copy can move from place to place and serve different readers over long periods of time, a different interpretation is required. We need to know about issue usage; the magazine as a product; and translate that information collected to define audience in a way that describes product usage.

The MRI approach
In the case of MRI, issue usage begins with the screening question. It is like an 'ever use' question designed to include the total population involved in the product or brand used. With this, MRI establishes the number of people who represent a market for using copies. MRI next asks about the rate of reading out of the average four issues that are published. Now we have a distribution of rate of use, still independent of circulation, but beginning to identify those persons who are, because they are heavy users of copies, more likely to be the subscriber and/or single copy purchaser. The next stage of data collection establishes recent users. Finally, the recent user provides information on intensity of use, and attitudes toward the magazine.

Thus, a body of information is obtained similar to what market researchers use to measure product usage. Keep in mind that magazines are a physical product capable of reuse by a second consumer, that their product life is extended by this inclination to read, and, finally, that there is a broad range of other variables that can be associated with and cause higher or lower readers per copy.

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The bridge to management use

There is still more to learn if we study further the differences between the uses of print and broadcast media research. Broadcast research provides the media industry with an estimate of the continuous level of usage because the medium is continously in use and selling and buying of small units of advertising time must be opportunistically estimated and then quickly post-evaluated to determine their efficiency. In radio listenership, the format within a specific daypart is the advertising product. That format and daypart is unique in time. Radio stations change formats regularly and this affects share of audience by daypart. So, also, is a television advertising opportunity. The programme telecast one night may never have the same competition as the next night. The need to measure broadcast discretely is because of the perishability of its advertising product.

The magazine issue is itself the advertising product and it is not perishable in an instant. Magazines have issue lives which are dependent on the demand to buy and the inclination and opportunity to read. Magazines are published at weekly, monthly and other intervals because the publisher believes the demand to buy can be sustained — weekly for a newsweekly, monthly for a women's service title. However, the inclination to read, even for a subscriber, may be less frequent than the publication interval. The single copy purchaser may buy a weekly or a monthly once a year, or once a month and still have an opportunity to look into every issue.

A MANAGEMENT USE OF SYNDICATED READERSHIP RESEARCH

Magazines are a physical product directly linked to their audience no matter how casual the relationship. The first-time reader of *Smithsonian* or *Playboy* quickly forms and develops an attitude and evaluation which will condition his intention to read it again, buy it again, or subscribe to it and continue to subscribe.

On average, out of over 200 titles measured, the MRI respondent screens-in on from one to fifty. The frequency distribution of this magazine potential from the most recent MRI survey is illustrated in **Table 1**.

At this stage we know that consumer magazine product usage, pretty much, is limited to 89% of the population; and the median number of titles used is close to 10. For a marketer it should be useful also to know who does not use magazines at the insignificant level of usage — none in the last six months — and who are the heavy users. The screen-in level, highly useful to magazine audience research, can be equally informative to magazine product research. However, the incidence of use being so broadly based in time, the screen-in level

TABLE 1

Frequency of magazines	Screen-In	
	%	Cume
0	11	11
1- 5	32	43
6-10	20	63
11-15	12	75
16-20	7	82
21-25	5	87
26-30	5	92
31-35	2	94
36-40	2	96
41-45	1	97
46-50	1	98
51 plus	< 2	100

Base: MRI Spring 1983

is too broad a measure. Even in combination with other titles the duplication of brand use would not be particularly informative at this stage. We need to know the relative rate of use; who are the heavy, medium and light users, and how do they relate to recent users. Then we can define the proper universe within which each magazine establishes its franchise.

Now we are at the point where the magazine product and the advertising product can come together. The term MRI gives this union is Magazinestyles. Understanding Magazinestyles can begin to help us understand and use magazine audience research from a practical point of view that is related to the nature of the medium.

A MODEL

If each magazine is scored from 1 to 6 for each respondent depending on screen-ins and claims of frequency of reading from 0 to 4 as follows:

TABLE 2

Value	Score
Did not screen in	1
0 Frequency	2
1 Frequency	3
2 Frequency	4
3 Frequency	5
4 Frequency	6

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and if these scores were matrixed for all readings of all magazines read by each respondent, we could obtain correlations which would group magazines by type, the types being the factors generated by the correlations. Having formed these types or factors, we can next look at the number of people represented by the average readership of these titles and the unduplicated readership of the average circulation.

Since we have the average circulations of these magazines, we can estimate how a given number of copies attract specific audiences because their editorial contents are attractive to attitudes, interests or opinions in the population. Publishers can and should examine duplicated rates of readership to determine the size of the universe in which they seek to establish and maintain a publishing franchise.

For the publisher (and the advertiser) an information opportunity lies in the factor analysis of relative rates of magazines readership. It should be important for the publisher to know the levels of circulation that are supported by various Magazinestyle segments. Factor analysis can produce a more sensible understanding of magazine advertising value, and a more realistic and practical understanding of magazine reach and frequency.

MANAGEMENT USE OF READERSHIP RESEARCH — AN EXAMPLE

I will use an example from a recent investigation of MRI data, the results of which were presented at the ARF Conference in March 1983. In this example, I wished to demonstrate how magazine audience research can come together with the management need to know, and better describe the magazine advertising product.

A '20 factor solution' was performed on reading scores of a sub-sample of 2100 respondents. The 20 magazine groups were dubbed based on the titles grouped by the analysis. Circulation against the net average readership of these titles was posted. The results were not meant to be definitive, but merely a test of a procedure which might be more intensively employed by publishers and advertisers to better relate audience data to the nature of the magazine medium. **(Table 3)**.

Let us take one of these, *"Woofers and Tweeters"* quite descriptive in the way it carves out a magazinestyle group. This group is composed of three magazines exclusively assigned to it, and four others assigned to it as well as to other groups **(Table 4)**.

These titles have been grouped together because they have heavy readers in common. Clearly the audio buffs define the group but their description is enhanced and informed by the associated readership of *National Lampoon, Rolling Stone, Bride's* and *Modern Bride.*

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TABLE 3
A 20 factor solution

Factors	No of* Titles	Net Aud. (000)	Circ. (000)
Seven Ladies Plus	8	90,789	60,800
Wheels & Squeals	11	14,764	5,000
Sophisticated Ladies	9	26,436	11,300
Bulls & Bears	6	10,404	3,700
The Sexual Revolution	5	24,183	9,400
The Good Life	6	10,527	3,700
The Week That Was	3	43,776	9,900
Fishing & Shooting	4	19,919	4,200
Black is Beautiful	3	10,213	2,600
Nature's Garden	4	15,440	5,500
$E = mc^2$	5	13,743	4,200
Popular Press	4	28,545	9,900
The Literati	4	5,220	1,600
Woofers & Tweeters	3	3,120	600
Patio Pro's	4	11,381	3,100
Tee For Two	2	4,596	1,700
Babes In Arms	3	9,998	3,500
Ports of Call	5	2,866	500
Shutterbugs	2	4,858	1,900
Hills & Volleys	4	5,446	1,600

* Exclusively assigned

(These titles should also represent a good opportunity for subscription advertising for each other. Would a subscription to *Audio* be a proper bridal gift?)

TABLE 4
Woofers & Tweeters

	Loading
Stereo Review	.613
High Fidelity	.613
Audio	.583
*Rolling Stone	.338
*National Lampoon	.301
*Bride's	.291
*Modern Bride	.285

*Assigned to other groups as well

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HOW MAGAZINESTYLES CAN BE APPLIED

Magazines by their nature suggest advertising opportunity. The demographics of newsweekly readers suggest to advertisers their fitness for purpose. What else could we find if we dug deeper?

The total number of people in the population who read newsweeklies is estimated by the screen-in question because that is the upper limit of the measured audience.

Usage of newsweeklies as described and distributed by frequency of use can next be analysed for the demographic variables of the survey — age, education, income, census region, county size etc. If a newsweekly is going to increase its share of market, the different magazine markets in which it operates ought to be known. By factor analysis, *Time Magazine* can be seen to have one marketplace among 18-34 year olds and another among 35-54. These markets can be defined by heavy readership within a common group of magazines. These are the people who sustain the magazine as a product: and the magazines that determine the factor can be seen to lead the market for any of a large number of advertised goods and services.

Another example

Let us examine "The Good Life" — a factor which is composed of six magazines exclusively assigned and six also assigned to other factors. The six exclusively assigned were the following. The relevant statistics for each are shown in **Table 5.**

With the highest concentration of circulation in this group, *Bon Appetit* has the lowest readers per copy index. With the lowest circulation in the group *Town & Country* has the highest index. Copies of magazines do not seek out users. Users seek out copies. It seems logical

enough that the highest share of usership within a population of people with similar interests would not be obtained by that magazine which achieves the greatest saturation.

In short, readers per copy (or users per magazine) are not obtained willy-nilly across the population but rather in a very well defined population of users defined here as 'Magazinestyles'. Determining how many copies can be sold to these users is as difficult as knowing how many bottles of Frascati can be sold to wine drinkers. Magazines, like good wine will have more tasters than purchasers. What wine drinkers will drink may well not be in proportion to what brands they buy. However, a regular reader of *Bon Appetit* is more likely to read *Cuisine* than someone who does not read any culinary magazine. The wine drinker will drink a Frascati, though not being a buyer of it, before a non-wine drinker will.

The heavy user of magazines within magazine groups sustains the market for copies and generates readers per copy.

Unfortunately, the formula approach to reach and frequency is not very informative in this context. The formula approach to reach and frequency cannot identify the respondent by his or her heavy usage characteristic but only estimates the number in each frequency group. The only real identification of a heavy use of magazines comes from a direct question about number of issues read on average. Pairs and two-issue cume information are an advertising research artifact for estimating the audience size and frequency of issue exposure for long term magazine schedules. They have no value for identifying who and how many are the heavy users of magazines.

TABLE 5
The Good Life

Title	Loading	Circulation (000)	%	Total adults (000)	%	Index
Gourmet	.605	549	15	2708	17	113
Cuisine	.579	719	20	2801	17	85
Bon Appetit	.544	1219	33	4636	28	85
Town & Country	.456	314	9	2103	13	144
Architectural Digest	.442	503	14	2346	14	100
Food & Wine	.406	357	10	1728	11	110
		3660	100	16322	100	100

AVERAGE RPC: 4.46

CONCLUSIONS

(1) *The magazine medium differs essentially from radio and television.* Broadcast and print are similar only in that they require the time and inclination of the user. In broadcast the programme or format is the product, perishable in the time spent using it. Magazines are a longer lived physical product capable of reuse and sought out by groups of people who are defined by their common and regular use of those magazines.

(2) *MAGAZINESTYLES describe this behaviour.* The relative rate of magazine use can be used to gauge the circulation potential of magazines. Secondary magazine users result from non-buyers using the title because the magazine relates to their attitudes, interests, and opinions as evidenced by relative frequency of readership of similar titles.

(3) *Trending share and size of audience* and circulation within magazinestyle markets should be informative to the selling of magazines to users and the understanding of readers per copy.

REFERENCE:

1 Joyce, T, (1974) *Journal of Advertising Research*, December.