

175BUYING PATTERNS AND READERSHIP OF WEEKLY MAGAZINES: IS THERE SOME RELATIONSHIP?

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Marketing researchers, in almost all sectors, from fmCG to durables and services, investigate consumption and purchase trends in order to evaluate sales and give a quantitative estimate both of market volumes and main market shares.

In the area of media, particularly with reference to weekly magazines, each title is a special kind of consumer good which has two markets:

- the editorial market where the customer is the buyer of an issue (no matter if reader or not);
- the advertising market where the customer is the reader of an issue (no matter if buyer or not);

This is to explain the double aim of media marketing research that is to provide:

- data on circulation, buying patterns and buyers' profile;
- data on readership, number of readers, frequency of reading and readers' profile.

Since media research is intended for the advertising market, we are all mainly concerned with surveys on readership and readers' profile. So, considering the editorial market and the advertising one, you have to carry out different surveys for different users, with different aims.

This does not mean that the results of these studies could not be usefully compared, but there is a gap between the editorial research and the advertising one on the same product, (ie. weeklies). This gap is not helpful in the explanation, investigation and understanding of the dimension of some phenomena such as the replicated reading and the parallel one which we have been discussing for so many years during our meetings.

Data analysis both on circulation and buying patterns of titles allows to formulate some hypotheses regarding apparently unaccountable situations which we have faced, even recently, in readership surveys in Italy, e.g.:

- 2 similar titles with the same circulation but markedly different readership levels,
- or
- 2 similar titles with the same readership but different circulation levels.

Since 1990, each year, we carry out in Italy a survey on a national sample of 6,000 households representative of the total population consisting of 20 millions Italian households.

This is a subsample of a panel of 12,000 households recruited each year in order to collect data about consumption of 300 f.m.c.g.

The purpose of our survey is to provide data on buying patterns of weekly magazines: no information about reading is included.

The fieldwork is divided in two steps:

- During the first step a telephone interview is carried out in order to
 - screen households who bought at least a copy of weekly magazine in the past three months;
 - select among the members of the household a person in charge of keeping a diary.
- During the second step each household record on the diary, day on day and for 12 weeks, the purchase of weekly magazines by individual members of the household.

For each copy of a weekly magazine purchased by the household the following information are recorded:

- the title
- the day in which the copy is available
- the issue number or date
- the member who entered the issue
- the source of the copy (subscription or purchase at the newsstand).

In addition the geodemographics of the household and of each member are collected.

The 40 weekly titles have been divided in 7 genres as follows:

Women (6), News (5), Family (5), Popular (7), TV Programmes (6), Children (6), Sport (5).

We will now deal with women's weeklies, just to have a look at some results of the survey and to illustrate our hypothesis concerning the relationship between buying patterns of a title and reading behaviour.

A little more than 20% of Italian households, are "buyers" of women's weeklies, i.e. 4,290,000 households: this means that they buy, during 12 weeks, 1 issue at least among the 6 women's titles considered; with a total amount of about 27 million copies which is equivalent to something more than 6 copies per household, considering 1 or more titles.

Titles	Households Buyers (‘000)	Regular (9-12) %	Usual (4-8) %	Occasional (1-3) %	Average No of Copies	Total Copies (‘000)
A	681 = 100	7	9	84	2.4	1,650
B	1,074 = 100	15	16	69	3.4	3,650
C	1,305 = 100	17	15	88	3.6	4,700
D	1,440 = 100	11	15	74	3.1	4,450
E	1,167 = 100	16	20	64	4.0	4,650
F	1,806 = 100	18	22	60	4.2	7,600
At least one	4,290 = 100	26	27	47	6.2	26,700
Only one	2,350 = 100	20	14	66	3.9	9,150

One can notice that some households buy one or more women titles every week or very nearly and it is possible to label this category as regular buyers (9-12 issues out of twelve). Others buy about half of the issues and they can be labelled as usual buyers (4-8 issues out of twelve). A sizeable part of them, finally, can be regarded as occasional buyers (1-3 issues out of twelve).

55% of them, i.e. 2,350,000 out of 4,290,000, are buyers of only one title during the 12 weeks and 80% of them are occasional buyers or usual buyers; this means that in 1,880,000 households (44% of total buyers) no copy of women weeklies are bought for many weeks.

On the whole the number of buyer households of an average title in the average week is about 30% of the total buyers, with variations between a minimum of 20% (for title A with a low fidelity) and a maximum of 35% (for title F with a higher fidelity). If we split the buyers in the average week through regular, usual and occasional buyers we obtain:

Titles	Buyers in the Average Week		Regular	Usual	Occasional
	% of total	('000)	%	%	%
A	20	138 = 100	30	18	52
B	28	305 = 100	46	24	30
C	30	391 = 100	51	21	28
D	26	370 = 100	35	26	39
E	32	378 = 100	47	28	25
F	35	635 = 100	48	29	23
Average	30	370 = 100	46	26	28

This means that **each week**, concerning 305,000 copies of title B:

- 46% of the copies are purchased by households from the category regular buyers who buy an issue every week or very nearly (10.7 out of 12): on the whole period we get 160,000 households.
- 24% of the copies are purchased by households from the category usual buyers who buy an average of 1 issue every 2 weeks or something less (5.0 out of 12): on the whole period we get 180,000 households.
- 30% of the copies are purchased by households from the category occasional buyers who buy an average of 1 issue every 8 weeks (1.5 out of 12): on the whole period we get 730,000 households.

So, we are able to explain the building up of the 1,074,000 households buyers of title B in the 12 weeks.

Let us turn now to National Readership Survey data (AUDIPRESS) and circulation data (ADS) concerning women weeklies during the same period (Autumn 1991).

Titles	Last Int. Readers ('000)	Circulation ('000)	Readers Per Copy
A	2,105	165	12.8
B	2,084	340	6.1
C	2,585	385	6.7
D	2,578	365	7.1
E	1,585	375	4.2
F	3,061	560	5.5

Titles A and B have about the same number of readers but title A has 50% of the circulation of title B.

Our panel on buying patterns shows that, in the average week, regular buyers of title B are 46% (30% for title A), and occasional buyers of title A are 52% (30% of title B).

If we turn to titles D and E we can see that whilst they have the same level of circulation, title D has 1 million readers more than title E.

Our panel on buying patterns shows that, in the average week, occasional buyers of title D buy 39% of the copies (25% for title E) and regular buyers of title E buy 47% of the copies (35% for title D).

We can find similar situations also among other genres of weeklies; if we look at the two major titles of family weeklies and news weeklies, we observe:

Family Titles	Last Int. Readers (‘000)	Circulation (‘000)	Readers Per Copy	% Of Buyers		
				regular	usual	occasional
G	5,428	1,090	5.0	84	11	5
H	5,315	825	6.5	50	27	23
News Titles						
I	3,580	532	6.7	70	17	13
L	2,815	310	9.0	55	18	27

The more occasional buyers a title has, the more readers per copy are reached: this seems to be a constant.

The market of weekly magazines in Italy is characterized by highly differentiated situations as regards the structure of the circulation of titles - even belonging to the same genre and similar in contents. This depends on the different promotional strategies of publishing groups in respect of subscription campaigns.

Alongside with titles with a large share of regular buyers (or subscribers) there are titles with a large share of occasional buyers - “fuelled” also by promotions for specific issues.

So, it happens that titles with the same average circulation level have a very different total number of buyer households.

Which are the possible consequences on reading ?

Replicated reading is a marginal phenomenon in the households in which the new issue of the title is available every week.

On the contrary, replicated reading could be widespread in the households in which a new issue of the magazine is available every 2 or 6 weeks (of course if the issue is not thrown away at the end of the week).

The analysis of buying patterns does not provide the solution to the problem (a survey of the readership of buyers would be needed) but it points out the variability of this phenomenon, from one title to another, and thus the importance of an in-depth analysis of replicated reading, in addition to trying to find an estimate model which might be valid for all titles.