

# RESTORING CREDIBILITY TO SUNDAY MAGAZINE MEASUREMENT IN THE U.S.

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## Background

Nationally syndicated Sunday<sup>1</sup> magazines or supplements, like Parade and USA Weekend, are unique in a variety of respects. Not only does their distribution differ from that of traditional magazines, but they are almost always co-branded with the logo of the local carrier paper through which they are distributed. More than 900 different newspapers carry one or the other of these two publications. Nonetheless, many consumers think that these magazines are actually produced by their local paper and they are unaware that they have national distribution. While the words to best describe Sunday magazines have been hotly debated by their publishers for years, no information had been gathered until recently on how consumers themselves thought of these publications. These issues have all contributed to the challenges of measuring Sunday magazines appropriately.

Measuring Sunday supplement readership is not unique to the U.S. At recent readership symposia, British researchers have presented papers describing their approach towards resolving the issue of measuring Sunday magazines. While their solution is certainly well founded and informative, it cannot serve as a guide for our distinct problem for several reasons. First, Sunday supplements and national newspapers in the UK have historically been measured with the same screen periods used for magazines. Second, and more importantly, the names of the UK Sunday supplements generally have the name of the carrying newspaper in their respective titles. This minimizes any “unique identifying problem” for the Sunday supplements, an issue that presents itself in the United States.

## History of the Current Practice

Since the late 1970's, audiences of Sunday magazines like Parade and USA Weekend have been measured by attributing the readership of their carrier papers to the magazines themselves. When Simmons introduced this method in the late 70s, it supplanted the previously used through-the-book measure and was shown to provide similar audience levels. MRI adopted the “carrier paper” method shortly thereafter, when it introduced recent reading to the U.S. in 1979.

In the intervening years, industry discomfort with this measurement technique grew as the number of people in the advertising community who could recall the reasons behind its adoption or its subsequent validation declined. This discomfort was exacerbated when MARS, using a form of direct measurement for Sunday magazines, reported audience levels for Sunday magazines in the spring of 2001 that differed substantially from those reported by MRI. An Advertising Research Foundation subcommittee was subsequently created to deal with the issues related to measurement of Sunday magazines.

Advertisers' concerns have been largely driven by the perception that audiences for these publications are overstated, because all carrier paper readers are attributed to Sunday supplements. While the proportion of carrier newspaper readers who read these publications is almost surely less than 100%, there are aspects of MRI's current method which potentially eliminate some readers:

- Screen-in Question: Sunday newspapers, which provide the basis for the audience estimates of Sunday supplements, are measured by first asking respondents if they have read the applicable Sunday paper in the last 4 weeks. Daily newspapers are measured using a 7-day screen. In contrast, traditional weekly magazines, with which these publications compete, are measured using a six-month screen.
- Pass-Along Readership: Sunday magazine audiences are, by definition, limited to only those people who read the appropriate carrier papers. In the U.K., the proportion of supplement readers who do not read the carrier paper has been reported at 12%.<sup>2</sup>

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<sup>1</sup> The overwhelming bulk of the distribution for these publications, but not all, occurs on Sunday.

<sup>2</sup> Erhard Meier, Ipsos-RSL: Inconsistent Readership Claims – A British Case Study. 1999 Worldwide Readership Symposium, Florence.

- **Unaided Recall for Non-local Newspapers:** Additionally, with the exception of national newspapers, only specific local newspapers are prelisted in the survey for each county within different local markets. As a consequence, respondents can only volunteer their reading of non-local newspapers, some of which carry one of the Sunday magazines. All evidence suggests that unaided recall provides substantially lower incidence levels, potentially depressing the audience of the Sunday magazines, which may also be read by visitors to markets in which it is distributed.

### The Parade Initiative

In January of 2002, at a meeting of the ARF subcommittee, Parade proposed a series of steps designed to establish best practices for Sunday magazine measurement and to help move the industry towards resolution of these issues.

The Parade initiative was endorsed by the Advertising Research Foundation, the Media Rating Council, MRI, MARS, and USA Weekend. It involved three elements:

- A nomenclature study to determine the appropriate words to describe these publications.
- A carrier paper study to determine whether carrier paper identification affected measured audience.
- A literature search to determine the effects of the screening interval on measured readership.

**The Nomenclature Study** determined that the most appropriate wording to use in describing Sunday magazines to consumers is "magazine in the Sunday paper".

A series of qualitative studies was first conducted to identify the various ways and the key words that consumers use to refer to these publications. MRI conducted one on one interviews where consumers discussed the words that they used and ranked a variety of descriptions in terms of their appropriateness. These studies provided the basis for a quantitative 2-page mail survey that was fielded among a nationally representative sample of 2000 and established the preferred terminology by asking the same series of question for Parade, USA Weekend, and The New York Times Magazine.

Prior to the survey mailing an alert postcard was sent to the prospective respondents. The mailing itself included a \$1 incentive and a cover letter with the name and phone number of someone to call with questions, if any. A second mailing went out to non-responders about four weeks after the initial mailing. The study used 6 rotations; 3 were used to rotate the publications and within each of those there were forward and reverse rotations for the statements being assessed. The study generated a response rate of 42.3%.

"Magazine in the Sunday paper" scored the highest in terms of top 2 box preference for all 3 publications measured.

#### How Well Does the Statement Describe the Publication? Top Two Box Scores

	Parade	USA Weekend	NYT Magazine
<b>Magazine in the Sunday Paper</b>	<b>61.5%</b>	<b>47.2%</b>	<b>42.2%</b>
Magazine in the Sunday or Weekend Paper	45.4%	44.8%	29.4%
Sunday Newspaper Magazine	49.5%	42.9%	28.9%
Sunday Newspaper Insert	55.7%	42.4%	21.9%
Weekend Magazine	28.1%	33.9%	36.5%

When asked to identify the single statement that best described the publications, almost two-thirds chose some combination of the words Sunday, magazine and paper.

**One Statement That Best Describes**

	<b>Parade</b>	<b>USA Weekend</b>	<b>NYT Magazine</b>
Magazine in the Sunday Paper	33.1%	20.2%	29.8%
Magazine in the Sunday or Weekend Paper	10%	14.9%	4.9%
Sunday Newspaper Magazine	21.3%	19.0%	31.2%
<b>Total Sunday/Paper/ Magazine Combos</b>	<b>64.4%</b>	<b>54.1%</b>	<b>56.0%</b>
Sunday Newspaper Insert	34.2%	28.5%	6.9%
Weekend Magazine	1.5%	17.3%	27.3%
Total Weekend Combos	11.5%	32.2%	32.2%

While not all the distribution of this class of publications occurs on Sunday, this wording is appropriate for the overwhelming bulk of the distribution.

**The Carrier Paper Study** showed that carrier paper identification is essential to the appropriate measurement of Sunday magazines. The MRI 2-page mail study measured 7 day readership using a six-month screen of Parade and USA Weekend in four designated counties. They were:

- Snohomish County, WA (Seattle)
- Suffolk County, MA (Boston)
- Cook County, IL (Chicago)
- Midland County, TX

The counties represent a cross-section of the country by both region and county size. In each market there were two cells, a test group where readership was measured with carrier paper identification and a control group where readership was measured without carrier paper identification. The exception was in Midland, where there was no local carrier paper of Parade with substantial circulation. Both questionnaires employed the traditional six-month screen and seven-day readership question for weekly magazines. The experimental group was shown the logo of the dominant county carrier paper for each Sunday magazine in smaller type over the Parade or USA Weekend logo. In addition, the text also identified the names of any other carrier papers in the market. The control group contained a generic description of the two magazines, using the results of the nomenclature study.

A total of 1000 questionnaires were mailed in each market. As was the case with the nomenclature study, an alert postcard was mailed to prospective respondents in advance of the survey mailing. The initial mailing included a cover letter and \$1 incentive. Approximately 4 weeks after the initial mailing, a second mailing was sent to non-responders that included an additional \$1 incentive. The response rate was 45.4%.

Carrier paper association produced higher audience levels for 4 of the 7 cells. The study found that readership estimates were significantly higher (at the .05 level)<sup>3</sup> for three of the seven readership comparisons, and, for a fourth, at the .10 level.

<sup>3</sup> A one-tail test was used since the direction of the difference was predicted.

### Readership Comparisons Market Coverage

	Parade Magazine Estimate – Generic Version (Control)	Parade Magazine Estimate – Carrier Newspaper Version (Experimental)	USA Weekend Magazine Estimate – Generic Version (Control)	USA Weekend Magazine Estimate – Carrier Newspaper Version (Experimental)
Suffolk County, MA	29.7**	37.2**	11.5*	19.5*
Cook County, IL	42.2	39.6	22.2	23.0
Midland County, TX.	NA	NA	32.8*	42.3*
Snohomish County, WA	37.6	33.2	13.7*	21.1*

In other words, Sunday magazine readership estimates were significantly and substantially higher when the carrier newspaper logo and descriptions were included in the body of the question. Furthermore, the finding of these significant differences among the seven comparisons was unlikely to occur by chance alone.

### Effect of the Screening Interval on Readership

The issue of the effects of the screening interval on measured audience has been well-documented and extensively debated at previous readership symposia. Dr. Valentine Appel, representing USA Weekend, contributed generously to work that was done on the literature search. However, the search was abandoned when it became clear that a six-month screen had been accepted as appropriate for Sunday magazine measurement. The issue, while of potential importance for newspapers, became academic for Sunday magazines once we realized that a more direct measure was feasible.

### The Solution

When the results of the Carrier Paper Study were presented to the ARF in January of this year, Parade and MRI jointly proposed a solution for MRI measurement of these publications that has also been endorsed by the Advertising Research Foundation and the Media Rating Council. The study is being conducted by MRI and is co-funded by Parade and USA Weekend. It uses two separate surveys, the first of which is patterned after the test version of the carrier paper study to determine the relationship between the audiences of Parade and USA Weekend to those of their respective carrier papers. The surveys are being personalized based on the zip code – and associated county – of each potential respondent.

- A 2-page mail survey conducted among a nationally representative sample of 3000 will directly measure the readership of Parade and USA Weekend, as well as key demographics. This survey incorporates both carrier paper identification and the appropriate wording. The survey design can encompass up to four carrier papers for each publication. The criteria for including a newspaper in the list are either the newspaper's county circulation is 4% or more, or the county is the "home county" of the newspaper. There are two rotations.
- A simultaneous 2-page mail survey of Sunday newspaper readership conducted among a similarly sized replicate sample, in which each respondent will be asked about their readership of national newspapers and the local newspapers distributed in their areas, will be used to establish readership of each publication's carrier papers. The rules for including newspapers in this version are the same as the other version, but the newspaper doesn't have to carry either of the Sunday magazines. The newspaper readership questions parallel those used in MRI's personal interview. Demographics are also asked.

For both surveys, a.) an alert postcard will be used, b.) the survey will include both a cover letter and a \$1 incentive, and c.) a second mailing will go out to non-responders four weeks after the initial mailing. The results will be used to calculate separate factors for each publication, which will then be applied to the carrier paper audiences, produced by MRI's personal interview. The extent to which various factors will be needed to reflect the appropriate demographic profiles will be determined based on the magnitude of the differences that are found between Sunday magazine readers and readers of their respective carrier papers.

A Media Rating Council audit is taking place concurrent with the study's fielding. Results are expected in early November at which time they will be shared with the ARF and the MRC. We are excited by the prospect of restoring industry confidence in the audience levels that MRI reports for these publications and look forward to having results to share with the industry later this year.

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\* Significant at the .05 level – one-tailed t-test

\*\* Significant at the .10 level – one tailed t-test