# HOW SUBSCRIBERS, SINGLE COPY BUYERS & PASS-ALONG READERS RATE MAGAZINES THEY ARE EXPOSED TO

One of the more interesting comparative studies of primary and pass-along readers was provided by Monroe Mendelsohn Research, Inc.'s (MMR) 2004 Publication Readership Satisfaction Survey (PReSS). This study explored how 17,500+ respondents evaluated 199 publications on a variety of qualitative criteria. In addition to questions about their product use and personal activities, respondents were presented with listings of magazines and/or national newspapers organized by genre (automotive, bridal, celebrities/entertainment, etc.). To screen in for any publication, a respondent had to have read it in the past six months. Those who qualified were then asked about their frequency of readership; time spent; amount of the contents usually read; their overall rating of the publication; whether it differs from other publications of its kind; if it is "cutting edge"; or contains useful ads; and so on. The result is a fairly comprehensive set of metrics that tell publishers how their magazines rate, relative to others on many important questions.

Since the 2004 PReSS study asked its respondents how they usually obtained their copy (or copies) for each publication read, it provides a particularly noteworthy distinction between subscribers, single copy buyers and pass-along audiences. The overall averages for 199 publications for eight of the qualitative indicators included in the PReSS study are summarized in the first table. As can be seen, and not surprisingly, subscribers were more closely bonded to the publications they read than pass-along readers, often by very wide margins. With the exception of frequency of reading, single copy vs. subscriber differentials were much smaller or, in some cases, non-existent. For example, 40% of subscribers rated the magazines they read as "cutting edge" and 39% of single copy buyers made the same assessment. In contrast, only 28% of pass-along audiences were so positively inclined. Similarly, median time spent averages reveal that subscribers usually spent 36 minutes with the issue and single copy buyers came in a close second with 33 minutes. On the other hand, pass-along readers spent only 24 minutes with the issue.

Taking the overall results for "bonding" or "affinity" indicators from the first table, we found that single copy buyers were 20% less positively inclined towards the magazines they read than subscribers, while pass-along readers were 41% less positive about them. The latter ratio falls well in line with previous studies comparing primary versus pass-along readers in terms of reading intensity, ad recall, etc. Data on single copy buyers are, however, much more scarce,

How Subscribers, Single Copy Buyers And Pass-along Readers Rate Magazines They Are Exposed To Continued

and on this score a word of caution is required. Although it makes sense that single copy buyers are somewhat less responsive to a magazine across the totality of its editorial product, they may find the particular issues they are enticed to buy extremely interesting and rewarding.

Also noteworthy are the differentials between various magazine genres (and, of course, between specific titles) in terms of reader bonding, qualitative perceptions and, by inference, affinity. While we cannot show this in book-by-book detail, we have selected 19 editorial interest genres from the PReSS study and compared the percent of readers who rated the publication as "excellent" for subscribers, single copy buyers and pass-along audiences. These relationships are shown as indices in the second table. For example, the average single copy reader of an automotive magazine was 35% less likely than subscribers to rate the book as "excellent" (65 index). Pass-along readers of the same publications were 58% less likely to make such a positive assessment (42 index). There are wide variations in these indices, with single copy buyers of men's, parents/baby, sports/outdoors, golf, leisure/travel and celebrities/entertainment magazines rating these publications just about as highly as subscribers. This was much less the case for the automotive books, as well as the hunting/fishing and hobby categories.

There is a wealth of data in the PReSS study that offers publishers a unique view of how their magazines are perceived by consumers, relative to other reading options that are available. Consider for example a publisher who is vitally concerned with his/her positioning vis à vis certain direct competitors. Using PReSS (subject to sample size limits, of course), the publisher can see how his/her title rates among those who read it and each of several rival magazines. If those who read both rate one book significantly higher in such pairing studies, this can have great significance editorially and, potentially, in terms of ad sales. Certainly books that trend well across a succession of studies of this type can make a strong competitive superiority pitch.

The TV networks routinely rely on qualitative indicators—such as those in the PReSS study—when evaluating their shows and considering the addition of new series to their schedules. Ongoing studies track all shows as to likeability, future viewing intentions, etc., creating a PReSS-like database that covers the entire spectrum of program content. This provides a strategic planning tool that assists the networks in predicting which shows might be winners, which ones are fading, etc., and plays a key role in scheduling decisions (do you air your new primetime entry against rival shows A and B, or should you avoid them due to commonality of appeals?). While PReSS can't provide publishers with all of the answers, it offers a strategic platform for evaluating the strengths or weaknesses of various titles over time, which heretofore was available only on a custom or ad hoc basis. As such, it is a much-needed initiative for the magazine industry.

How Subscribers, Single Copy Buyers And Pass-along Readers Rate Magazines They Are Exposed To Continued

## HOW 199 PUBLICATIONS COMPARED ON QUALITATIVE APPRAISALS BY HOW THE COPY WAS USUALLY ATTAINED

	SUB- SCRIBERS	SINGLE COPY BUYERS	PASS- ALONG
Rate Magazine As "Excellent"	48%	40%	27%
Read 4 Out Of Past 4 Issues	71	19	14
Usually Read All Of The Issue	42	31	15
Differs From Other Pubs. Of The Same Type	38	35	24
Is Cutting Edge	40	39	28
Contains Useful Ads	38	37	30
Contains Ads I Trust	32	32	27
Has Eye-Catching Covers	55	52	46
% Of Avg. Magazine Readership	38	23	39
Median Time Spent (In Minutes)	36	33	24

Base: Past six months readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2004.

How Subscribers, Single Copy Buyers And Pass-along Readers Rate Magazines They Are Exposed To Continued

## RELATIVE LIKELIHOOD OF "EXCELLENT" RATING FOR SELECTED PUBLICATION GENRES AMONG SUBSCRIBER, SINGLE COPY & PASS-ALONG READERS

	SUB- SCRIBERS	SINGLE COPY BUYERS	PASS- ALONG
Automotive/Motorcycles	100	65	42
Boating/Sailing	100	83	54
Business/Finance	100	76	52
Celebrities/Entertainment	100	92	54
Food/Wine	100	84	59
General Interest/News	100	80	62
Golf	100	95	34
Health/Fitness	100	74	50
Hobbies	100	69	60
Home	100	77	53
Hunting/Fishing/Guns	100	65	55
Leisure/Travel	100	94	61
Men's	100	99	54
National Newspapers	100	74	61
Parents/Babies	100	99	74
Personal Computing	100	92	41
Science/Nature	100	76	65
Sports/Outdoor	100	96	70
Women's	100	89	56

Base: Past six months readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2004.

# ATTRIBUTES THAT DRIVE OVERALL QUALITY RATINGS FOR MAGAZINE GENRES

While many people react positively to individual magazines they read, their responses often vary depending on the magazine's genre. In order to explore this complex issue we enlisted the cooperation of Monroe Mendelsohn Research, Inc. (MMR), whose 2004 Publication Readership Satisfaction Survey (PReSS) provides a valuable database showing how 17,684 adults rated 199 publications they had been exposed to in the past six months. Each reader was asked to give any publication s/he read an overall quality rating (choices ranged from "excellent" to "poor"). In addition, each book was rated on specific attributes such as "it's cutting edge" or "it contains useful ads." A genre-by-genre analysis of readers' positive evaluations reveals that there is a great deal of variation in which attributes provide the greatest—or the least—impetus for the overall quality rating of each genre.

To illustrate this process, let's create a hypothetical example for Magazine Genre A. In this example, 30% of Magazine Genre A's readers gave it PReSS's highest overall qualitative rating. As for specific attributes, 45% of its readers "very much agreed" that magazines within this genre "are entertaining." This specific attribute rating can be indexed against the overall quality score, in this case producing a 150 index (45% divided by 30%). If only 24% of Genre A's readers "very much agreed" that these publications are "cutting edge," this too can be indexed against the overall qualitative score, which produces an index of 80 (24% divided by 30%). One could interpret such findings to mean that the entertainment attribute played a considerably more prominent role (by almost 2-1) than the cutting edge attribute, among the readers who gave the genre an "excellent" overall rating.

Furthering this analysis, MMR created a special run from the PReSS database, based on 25 fairly tight editorial genres that we created. For each genre, we indexed seven attributes (of the twelve attributes that PReSS measured) against its overall quality rating, as described in the paragraph above. The following table summarizes the results on a relative index basis (with each overall quality rating equaling 100) for ease of comparison from genre to genre. Certain general tendencies are clearly apparent in this analysis. First, in most genres, readers are less inclined to rate individual magazines as "different from other publications of the same type" than the editors of these books might wish. In category after category, readers appear to see relatively few differences between magazines with similar editorial thrusts. This lack of perceived differentiation is most notable among men's health/fitness, PCs, personal finance and bridal magazines, but holds true for all categories, with the exception of the health genre.

#### Attributes That Drive Overall Quality Ratings For Magazine Genres Continued

Another overriding pattern is also noteworthy. Although readers are most enthusiastic when rating publications as "informative," this doesn't automatically imply that they believe everything they see in these publications. "Authoritative" ratings tend to be considerably lower than "informative" ratings in almost all genres. Ads, not surprisingly, rate even lower. Finally, being on the "cutting edge" is another attribute that is often claimed by editors but is not necessarily acknowledged by readers—at least within self-contained and reasonably homogeneous editorial classifications.

With these comments in mind, it is revealing to examine the findings for a number of genres shown in the table. Take Sunday magazines as a point of departure. Unlike many other types of magazines, these books rate very high (relative to their overall qualitative scores) in terms of being anticipated ("look forward to reading every issue") and their readers considering them both entertaining and informative. Whether these distinctions are a function of the magazines' editorial content or their modes of distribution (via the local paper) is a matter of conjecture: perhaps both factors are at play, but few magazine genres display this type of bonding with their readers.

The traditional women's service books parallel the Sunday magazines, scoring highest on the same three attributes, but the "sisters" also fare well when it comes to advertising ("has useful ads"). The implication is that readers have come to rely on these magazines as a sort of old and valued friend who provides helpful information, including though its ads.

In contrast to such broadly based and long-familiar titles, certain niche genres provide a harder-edged picture. Take the photography books for example. These readers evidently value the editors (and their staffs) as experts in their fields, since the primary photography magazine qualitative attribute is "it's authoritative." Not surprisingly, since the manufacturers of art/photography products are also seen as experts, the attribute "it has useful ads" also scored highly. No other magazine genre measured by PReSS approaches photography publications in this regard.

Other niche genres display similar tendencies. The golf books score well on being informative and having useful ads, but also do well on being entertaining; the car books' primary impetus was information content, followed by the entertainment attribute. Hunting and gun magazines show up strongly in PReSS's informative, authoritative and useful ad scalings, as did the PC books. In the last case, in addition to regarding the editors and advertisers as helpful experts, readers ranked being "cutting edge" highly, obviously a key factor in the ever-changing PC field. Similarly, the women's fashion genre also scored well relative to its overall qualitative performance on cutting edge criterion, which is not a surprise, given that a key motive for

#### Attributes That Drive Overall Quality Ratings For Magazine Genres Continued

reading these publications is to keep up on the latest fashions (an indication that fashion magazine readers may pay more attention to their ads as well).

By now our readers are probably asking, "How do individual publications stack up against their editorial genres? Are there significant book-versus-book distinctions?"

The answer in a number of cases is yes, but not in every genre. While we are not free to cite specific publication findings, a few examples—sans titles—may whet the reader's appetite. In the business category, not only did one title lead all others in terms of its readers "very much" agreeing that it is "authoritative" but it also stood out to a far greater degree on this criterion when looked at on a relative basis (its "authoritative" rating indexed against its overall rating). Another distinction was evident in the women's fashion field where several books led the pack by considerable margins in the "cutting edge" indices, while in the travel genre one book out-indexed another by a strong margin in the "authoritative" attribute.

As we have noted on previous occasions, MMR's PReSS offers magazine publishers, and especially their editorial and circulation executives, valuable insights on how well their titles are branded and perceived by the reading public. PReSS can't do the whole job, however, since it would take in-depth Book A versus Book B or C studies among common readers to tell a publisher why his/her magazine was stronger in one area but relatively weaker in another. So PReSS serves primarily as an ongoing tracking study that puts the 200 or so magazines it measures on a more level playing field, providing solid clues about reader response mechanisms and the qualitative performance of various titles. Although PReSS provides breadth, it cannot and does not provide depth; however, those savvy enough to use it as a frame of reference may find that it inspires more probing analyses and, hopefully, incites strong action to exploit areas of opportunity or corrective measures to shore up weak spots. A similar approach has been used successfully for the past 40-50 years by the TV networks to evaluate the ongoing appeal of their programs: overall familiarity/liking tracking studies spot positive trends or areas that need addressing, then more specific studies deal with each situation as needed. Magazine publishers could benefit by the TV networks' example.

Attributes That Drive Overall Quality Ratings For Magazine Genres Continued

## RELATIVE INDICES OF MAGAZINE GENRE READERS WHO "VERY MUCH AGREE" WITH SEVEN ATTRIBUTES COMPARED TO GENRE'S OVERALL QUALITY RATING

	DIFFERS FROM OTHER PUBS. OF SAME TYPE	LOOK FORWARD TO READING EVERY ISSUE	IS ENTER- TAINING	IS CUTTING EDGE	IS INFOR- MATIVE	IS AUTHORI- TATIVE	HAS USEFUL ADS
Black Interest (4)	97	101	124	96	124	103	96
Boating/Sailing (S	5) 83	147	186	114	136	100	126
Bridal (3)	63	86	121	80	139	85	146
Business (4)	80	56	75	84	173	125	56
Cars (4)	68	108	127	92	164	101	109
Entertainment/							
Celebrity (5)	84	101	185	100	129	78	73
Fitness (3)	71	92	127	101	168	100	102
Golf (3)	87	123	147	99	161	115	128
Good Food (3)	66	94	103	90	145	99	93
Health (2)	107	95	108	100	167	121	123
Home Service (6)	84	87	126	82	122	87	122
Hunting/Guns (4)	98	116	140	108	166	136	147
Men's Health/Fitr	ness (3) 56	71	109	98	141	120	104
Men's Interest (4)	77	110	162	97	104	63	65
Newsweeklies (3)	64	81	102	85	186	122	59
Outdoor (2)	62	104	169	85	168	109	123
Parenting (3)	69	107	110	79	153	112	114
PCs (3)	50	73	124	164	182	147	125
Personal Finance	(3) 58	89	86	94	159	109	64
Photography (2)	77	76	122	135	143	154	201
Science/Nature (5	86	79	107	92	135	109	47
Sunday Magazine	es (2) 99	148	182	83	172	93	84
Travel (3)	97	85	126	88	159	116	78
Women's Fashion	(6) 85	106	158	125	130	73	109
Women's Service	(5) 73	110	144	83	157	99	122

<sup>( )=</sup>Number of publications in category.

Note: This table reads as follows: compared to the overall positive rating for boating/sailing magazines, readers of this genre were 86% more likely to rate these publications as entertaining (186 index).

Source: Special analysis of Monroe Mendelsohn Research, Inc.'s PReSS 2004 data prepared for Media Dynamics, Inc. Index calculations by Media Dynamics, Inc.

## EVALUATING ENGAGEMENT BOTH WITHIN AND ACROSS MAGAZINE GENRES

Many magazine sales executives are fixated on using audience measurements to extract meaningful distinctions between their books and arch rivals in the same editorial genre. Yet all too often such efforts prove futile, merely confirming the general impression shared by many space buyers that most magazines in tightly defined categories are more or less the same in reader quality and/or engagement.

In order to explore this subject, we obtained the cooperation of Monroe Mendelsohn Research, Inc. (MMR), whose Publication Readership Satisfaction Surveys (PReSS) have been conducted since 2004. The 2005 study asked 15,891 adults whether they had been exposed to any of 219 publications in the past six months. Whenever a person indicated that this was the case, s/he was asked to give the book an overall quality rating on a scale ranging from "excellent" to "poor." In addition, each book was rated on a series of 12 attributes such as it's "cutting edge," it "contains attention-getting ads," and it's "different from others of its type," all designed to provide qualitative insights.

Since advertisers and their ad agencies are making a big deal about seeking more "engaged" audiences who may be more receptive to their ads, the PReSS findings have particular significance. Do they reveal major differences between publications, particularly *within* genres?

We took the PReSS findings and created 17 magazine groupings, eliminating all books that, in our opinion, did not conform tightly to a particular genre. For example, although seven magazines were in the automotive category, only four were "car books" in the traditional sense, and only these were analyzed. In like manner, we avoided vague classifications such as "general editorial" and any categories that included magazines with widely different editorial thrusts.

The first table takes these 17 tightly defined magazine genres and shows their average overall quality rating (each score was weighted equally, without regard to audience or circulation size) and highlow range. The PReSS data show that apparently there is a good measure of discrimination between some of the titles within the genres. For example, in the 4-book automotive category, the average magazine earned a 28.2% overall quality score, while the highest ranked came in at 36.1% and the lowest only half of that, at 18.7%. This was also the case with the bridal, home service, personal computer, travel and women's fashion genres. However, there was little to differentiate the magazines in the business, general sports and women's service categories, in regard to their title's overall rating.

## HOW VARIOUS MAGAZINE EDITORIAL GENRES PERFORMED BY OVERALL PRESS QUALITY RATING <sup>1</sup>

#### **OVERALL RATING**

	NO. OF MAGS. IN GROUP	GROUP AVG.	HIGHEST MAG.	LOWEST MAG.	HIGH/LOW DIFFERENTIAL
Automobile	4	28.2%	36.1%	18.7%	17.4%
Boating/Sailing	3	26.7	31.7	24.1	7.6
Bridal	3	33.1	39.8	27.5	12.3
Business	3	31.1	33.3	29.9	3.4
Celeb./Entertainmen	nt 6	34.6	38.2	29.6	8.6
Epicurean	3	39.5	43.8	35.2	8.6
Guns/Hunting	5	47.8	53.0	42.1	10.9
Home Service	10	33.8	44.5	25.7	18.8
Newsweeklies	3	33.0	37.6	29.9	7.7
Parenting	3	49.6	53.9	43.8	10.1
Personal Computing	g 3	29.7	36.8	22.4	14.4
Personal Finance	3	31.3	38.3	26.7	11.6
Regional Living	6	42.7	47.8	35.8	12.0
Sports-General	3	33.9	36.7	31.8	4.9
Travel	3	34.7	42.4	29.5	12.9
Women's Fashion	7	34.5	41.9	28.5	13.4
Women's Service	6	33.3	36.4	28.8	7.6

Note: Better Homes & Gardens is included in both the home service and women's service categories.

<sup>1</sup>Base: Past six months adult readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2005.

#### Evaluating Engagement Both Within And Across Magazine Genres Continued

As we reviewed the PReSS data, we came to suspect that readers tend to be highly genre-conscious when making their judgments. Ask a woman what she thinks about Fashion Book A, which she claims to have read, and her appraisals seem to be made in a comparative context to other fashion magazines she is familiar with. As a rule, she isn't really comparing Fashion Book A to **Newsweek** or **Travel + Leisure**, which she also may have read, but rather with Fashion Books B or C.

If our suspicions are valid, this poses a problem for anyone trying to utilize generalized "engagement" measures as a barometer of advertising exposure or impact across magazine genres. For a variety of reasons, magazine sales execs frequently find themselves contending in a "competitive set" that includes a diverse mix of titles. For example, in the women's fashion category, books like **Self** and **Cosmopolitan** are customarily included along with **Glamour**, **Vogue** and **InStyle**, even though the formers' primary editorial thrust are not necessarily fashion. In a similar vein, publications such as **GQ** and **Esquire** often compete with **Maxim**, **Sports Illustrated**, **Men's Health** or **Rolling Stone** for male-oriented ad campaigns, though obviously they are not the same, editorially.

To demonstrate the problems that can ensue when one crosses genre lines, the rest of the tables in this analysis take three common competitive sets—women's service, mass adult audience and men's interest—and indicate how the various contenders performed in their PReSS overall quality scores. For example, we see that the six traditional women's service books are fairly close to each other in overall quality scores, but contenders from other genres frequently outperformed them. Does this mean that the other genres provide a superior advertising environment?

Those seeking easy and universally-applicable answers in their quest for valid "engagement" metrics are bound to be frustrated by this sort of analysis. But don't blame PReSS. Advertising responsiveness is a complicated and endlessly differentiated subject, depending primarily on the specifics of each advertiser's branding/positioning situation, her competitive context, overall consumer perceptions of the product category and sales tactics of her particular ad campaign.

With this in mind, a marketer who is positioning himself as an industry pacesetter or innovator might consider PReSS's "cutting edge" ratings more relevant than its "attention getting ads" or "enjoyable to read" ratings. In the same vein, an advertiser who pitches her product/service as honest or dependable may give more credence to PReSS's "useful ads," "ads I trust" or "authoritative" indicators, but not "eye catching covers" or "quality photos."

As we have noted in previous articles on this subject, studies such as PReSS provide meaningful insights on several levels. First and foremost, they tell publishers (and editors, specifically) how well they are trending across a full range of reader approval metrics. Second, they provide circulation managers with clues about how prospective readers position their books against an array

#### Evaluating Engagement Both Within And Across Magazine Genres Continued

of alternative options. Third, they offer buyers and sellers of ad space some interesting descriptions of engagement, which might be used selectively as tie-breakers or trend-spotters, providing proper caution is taken and the data aren't overinterpreted.

Our key point is this: PReSS's main function is to point out possible areas of interest or differentiation and spot emerging trends in magazine appeals over time. Once an intriguing pattern is noted, a PReSS subscriber can then zoom in to take a closer look at the title and its competitors, using the other metrics in the survey.

For example, if Book A seems to have an edge over rival Book B regarding some important attribute, PReSS tabulations can isolate readers of both books and contrast them with those who only read A or B to note correlations or differences between the two titles. If something turns up at this point, a more specific study can be conducted by the interested publisher focusing only on the issues raised, to see if the possibilities put forth by the PReSS analysis prove out.

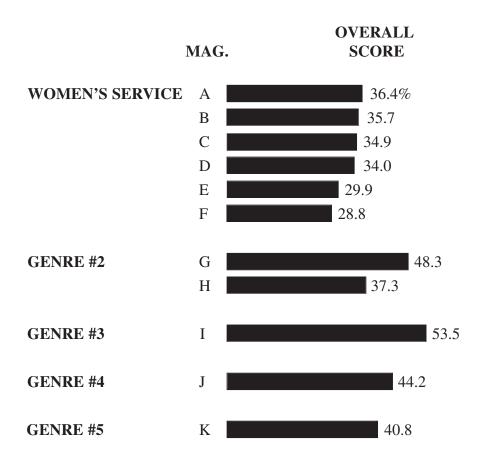
Of course one has to be sensible about the ways one uses PReSS or any other surveys. If one tries to dice things too finely—say by focusing on a relatively small demographic—one may come up with tiny and unstable sample bases. In such cases, the researchers can combine the results from several waves of data to provide a bigger sample. If that fails, the best bet is to relax the demographic constraints and allow the ensuing analysis to reveal whatever it reasonably can.

Ad sales implications aside, we regard PReSS as an extremely valuable tool for evaluating new magazine launches. Say a new publication is being considered—why not ask a sample of PReSS respondents who have already supplied their evaluations of 200+ existing magazines to rate the new idea compared to five or ten others (using mock descriptions of the latter)? Then take those who like and don't like the new idea and see what else they read, what attributes they seem most fixated with, etc.

The same point applies for positioning strategies when selling subscriptions. Take a sample of PReSS readers and try out various positioning strategies for the book in question as well as rival magazines. Which approaches score well and which don't? Which "sell" differentiates the book in question from its competitors? Which is most credible?

Too many overworked and understaffed media research directors look to companies such as MMR, MRI, SMRB and others to provide a single "currency," which answers all their questions and is readily accepted by everyone. Sorry, folks—the real world just isn't that simple. If editors, circulation managers or space sellers require actionable information, time and effort must be taken to single out the key elements or indicators that are relevant to their specific situation. Shortcuts aren't the answer.

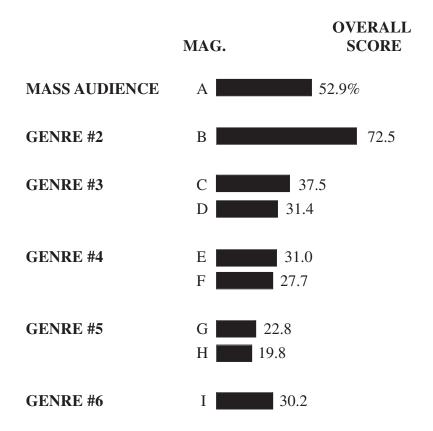
## HOW MAGAZINES FROM DIFFERENT GENRES COMPARE IN OVERALL QUALITY RATINGS IN WOMEN'S SERVICE COMPETITIVE SET<sup>1</sup>



<sup>1</sup>Base: Total adult readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2005.

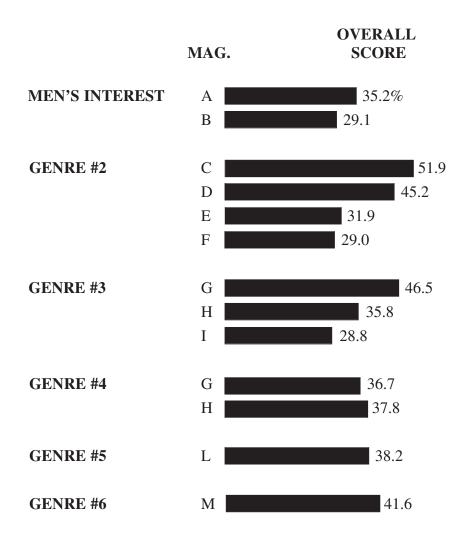
## HOW MAGAZINES FROM DIFFERENT GENRES COMPARE IN OVERALL QUALITY RATINGS IN MASS AUDIENCE COMPETITIVE SET<sup>1</sup>



<sup>1</sup>Base: Total adult readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2005.

## HOW MAGAZINES FROM DIFFERENT GENRES **COMPARE IN OVERALL QUALITY RATINGS IN** MEN'S INTEREST COMPETITIVE SET<sup>1</sup>



<sup>1</sup>Base: Total adult readers.

Source: Monroe Mendelsohn Research, Inc., PReSS (Publication Readership Satisfaction Survey), 2005.