

Highlights from the
MAGAZINE READER EXPERIENCE STUDY

Media Management Center
of Northwestern University



Magazine Publishers of America

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BACKGROUND

All brands face a collection of similar marketing challenges:

1. Enticing consumers to spend money on products as competitive and economic pressures rise
2. Capturing consumers' attention in the face of busier lifestyles and more information clutter
3. Overcoming consumers' hesitancy to purchase given their overall cynicism and desire to wait for "what's next," "what's better," "what's cheaper," and...

Failure to meet these challenges can reduce brand loyalty, resulting in increased customer drain, since attracting new consumers often cannot replace the loss of current customers. To avoid this situation, the best strategy for most brands, including media brands, is to increase consumer commitment by migrating light users to heavier users.

In addition to these general challenges, media brands face unique situations as a result of some of the metrics imposed by the advertising and marketing communities. Currently, most consumer media metrics were established by the broadcast media. Eyeballs are their prime currency.

Many advertisers are trying to get beyond eyeballs – to understand how the quality and environment of a medium enhances advertising. They seek a measure of media engagement, involvement, and connection (which, for magazines, results in two forms of measurement – based on audience and circulation).

The situation was described eloquently by Kevin Roberts, CEO Worldwide, Saatchi & Saatchi, in a speech on "The Age of Ideas":

"No matter what kind of business or organization you are, your first job in this narrowcast world is competing for the attention of consumers. That's the eyeball part. Then the real job begins – making connections with the hearts, minds, guts and nerve ends of consumers. The ability to create those connections, not the number of eyeballs you can access, is going to decide the media winners."

The implication – to understand consumer connections media must focus on how consumers experience their products.

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THE STUDY

To address these challenges Magazine Publishers of America (MPA) in partnership with the American Society of Magazine Editors (ASME), commissioned the Media Management Center at Northwestern University to develop an industry study based on magazine readers' experiences. The aim was to help the magazine and advertising industries understand and begin to measure consumers' experiences when they read a magazine and how those experiences do (or don't) drive readership and advertising impact. This work has relevance to editors, consumer marketers, publishers and advertisers.

METHODOLOGY

Northwestern's Media Management Center understood that most magazine research has been about content, design, ad exposure opportunity and/or effectiveness and reflected the advertising or magazine industry's point of view, in the language of researchers or the media. It has not represented the readers' language or their experiences. The Center's researchers began on August 1-20, 2002 by talking to 100 readers across the country in personal, in-depth interviews that lasted an hour or more. They inquired about consumers' experiences when they read magazines. Consumers' comments were studied and then recorded in consumers' own language in the form of 220 discrete descriptors.

Sample descriptors, in readers' words are:

- "I save back issues for a period of time."
- "I feel less stressed after I read it."
- "Some articles touch me deep down."
- "Some of the stories make me feel bad."
- "I only read the articles that I especially want to read."
- "It makes me laugh."

Next, a panel of readers was asked from September 24-October 22, 2002 which magazines they read. From this, Northwestern obtained a valid sample of readers of each of the top 100 MRI measured magazines. These top 100 MRI magazines represent a full range of magazine categories - 27 categories ranging from broad to niche and account for 96% of the readers of all MRI measured magazines. The magazines also varied in size with circulation ranging from more than 12 million to less than 300,000. So, the study's universe represents the overwhelming preponderance of all types of magazine readers.

Then, on January 24 - February 21, 2003, 4,347 magazine readers age 13 and older responded to a survey about their magazine reading experiences. Each reader answered questions pertaining to a specific magazine that he or she read and that was selected from one of the top 100 MRI magazines. Each respondent rated the 220 descriptions obtained in the qualitative interviews for this magazine alone. In addition, readers responded to questions on the dimensions of their magazine reading - how often they read, how many issues, how thoroughly they read magazines, etc.

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Studying readers' responses to a specific magazine provided more meaningful insights into magazine reading than asking about how they read magazines in general. The sample size for each magazine, however, was not large enough to allow valid analysis for the individual magazines.

The readers' collective responses were then statistically analyzed to yield insights about how those experiences affect magazine and advertising impact.

KEY FINDINGS

Researchers found:

- Stronger consumer experiences increase reader usage.
- Reader experiences lift ad impact.

These led to a set of related, important findings. Some of the key ones are:

- A rich set of multi-dimensional, qualitative experiences was identified, quantified, measured, and ranked by their impact in driving usage by reader segment.
- Magazine usage is made up of time spent and frequency of reading.
- The relative ranking of how reader experiences drive usage varies by consumer segment, especially by age, gender and ethnicity.
- Three experiences are universally strong across reader segments. These are:
 - I get value for my time and money
 - It disappoints me
 - It makes me smarter
- Readers value advertising content.
- Similar experiences drive reader usage and ad impact, but with different strengths.
- Across magazines, there is no difference in reader usage between subscribers and newsstand buyers.
- Across magazines, reader usage is independent of subscription pricing.
- The vibrancy of public place magazine usage is strong – it is twice that of very light readers.
- Across magazines, page count has no impact on reader usage.

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DEFINING READER USAGE

To determine the strength of consumer experiences required a vital step – defining usage from a consumer point of view.

From readers' responses to the questions on the dimensions of their reading--how often they read, how many issues, how thoroughly, etc--a sophisticated statistical analysis was performed. The Media Management Center research team of Professors Bobby Calder and Edward Malthouse found that two factors are key to consumer/reader magazine usage--they are the amount of time spent and the frequency of reading a magazine. The reader responses to the four questions form a **Reader Usage Measure (RUM)**:

1. "How much time in total did you spend reading or looking into a copy of _____ the last time it came out?"
2. "On how many different days did you read or look into a copy of _____ the last time it came out?"
3. "How many different times do you read or look into any issues of _____ in a typical month?"
4. "In a typical month, how much total time do you spend reading or looking into any issues of _____ ?"

Other factors considered for RUM that were not statistically significant include:

- Total pages read (completion)
- Number of issues read
- Days of the week read
- Time of day reading
- Time since started reading
- Overall satisfaction rating

The researchers' finding that magazine reader experiences affect reader usage has three major implications:

1. Magazines can encourage and grow their own usage by intensifying positive consumer experiences and/or reducing inhibiting ones.
2. RUM can be used over time as a diagnostic tool to gauge the effects of the efforts taken to strengthen readers' experiences with the magazine.
3. Results among different audience segments can be analyzed to see which experiences are most important in driving usage for each segment.

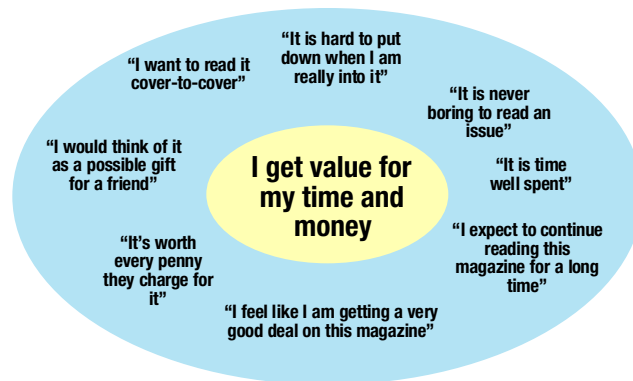
Highlights from the **MAGAZINE READER EXPERIENCE STUDY**

UNDERSTANDING READER EXPERIENCES

Readers' responses to the questionnaires allowed the Media Management Center to define, measure and prioritize readers' experiences. These experiences do not describe personal relevance of a given magazine. Instead they are attributes that define, describe and quantify the qualitative experiences of consumers when they read a magazine.

The magazine reading experience was found to be very rich, with many dimensions. Consumers rated those 220 descriptors, and they clustered to form a collection of 39 experiences.

It is important to note that – like atoms that comprise a molecule – each of these 39 experiences (molecules) are inextricably linked and supported by a specific sub-set of the 220 descriptors (atoms) that statistically clustered together to form them. The individual descriptors cannot be separated from the whole experience, e.g., the experience “I get value for my time and money” is linked to and comprised of eight descriptors that cannot be separated or “cherry picked” for favorites. They include:



Overall, thirty-five of the experiences motivate reader usage; four of them inhibit it. Note: Of the top 26 reader experiences, only one (#2) inhibits reader usage. While at first blush, an inhibitor might be construed as a negative, it is in fact an opportunity. It informs magazines about how they can evolve their product by strengthening experiences that motivate usage and minimizing those that inhibit usage.

Of further interest it is noteworthy that three of the total 39 experiences are universally strong across all consumer segments.

1. I get value for my time and money (a positive driver)
2. *It disappoints me* (an inhibitor)
3. It makes me smarter (a positive driver)

The full array of the 39 Experiences and their accorded descriptors can be found in the appendix to this paper.

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UNDERSTANDING READER EXPERIENCES AMONG DIFFERENT READER SEGMENTS

Reader experiences can be measured for different consumer segments to inform magazine and advertising executives about how best to connect with various groups. Some experiences, such as the top three overall, have high impact across a number of groups; others are stronger drivers for specific groups.

The Media Management Center considered 12 variables when evaluating rankings of readers' experiences, including:

1. Generation/Life-stage
2. Gender
3. Ethnicity
4. Lifestyle
5. Personality traits
6. Personal interests
7. Media Usage
8. TV viewership
9. Newspaper readership
10. Acquisition
11. Buyers vs. non-buyers
12. Subscribers vs. single copy sales vs. pass-along

The research team found that the first three of these factors were statistically important in driving usage: generation, gender and ethnicity. While the others have meaning, they do not strongly correlate to driving or inhibiting RUM. The following examples illustrate these differences.

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For the top 10 experiences, if we look overall at Men vs. Women, the order of the top 3 universal experiences that drive usage changes modestly. For Women the inhibitor 'It disappoints me' drops down to number 4 and 'It's my personal time out' rises into the top 3.

Furthermore, for Men, experiences such as: 'It's relevant and useful to me,' 'I trust it,' and 'I build relationships by talking about and sharing it,' bubble up. Conversely, the ranking of Women's experiences that drive readership differ. Women indicate that experiences such as: 'It's part of my routine,' 'I feel good when I read it,' and 'I find magazine high-quality and sophisticated,' are more important.

Top 10 Reader Experiences Ranked By Importance In Affecting Reader Usage (RUM)

Top RUM Drivers for Men

**It disappoints me*
*Value for time, money
*Makes me smarter
Stories absorb me
Learn things here first
Often reflect on it
Personal timeout
Relevant to me
Trust it
**Build relationships by
talking about, sharing it**

Top RUM Drivers for Women

*Value for time, money
*Makes me smarter
Personal timeout
**It disappoints me*
Feel good when I read it
Stories absorb me
Part of my routine
Often reflect on it
Learn things here first
**Find magazine high-quality,
sophisticated**

*Universally strong drivers

Experiences shared by both men and women

Experiences unique to each group

Inhibitors

Age segmentation offers further insights into the richness that experience data can yield.

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The example below compares the top 10 reader experiences for Gen Y Women and Women overall. Many of the experiences overlap for the two groups. However, for Gen Y, experiences such as 'Build relationships by talking about and sharing it' and 'Grabs me visually' are important drivers of their reader usage. 'Feel good when I read it' rises to become the second most important driver.

Top 10 Reader Experiences Ranked By Importance In Affecting Reader Usage (RUM)

For Women

*Value for time, money

*Makes me smarter

Personal timeout

**It disappoints me*

Feel good when I read it

Stories absorb me

Part of my routine

Often reflect on it

Learn things here first

Find magazine high-quality,
sophisticated

For Gen Y Women

*Value for time, money

Feel good when I read it

Personal timeout

Find magazine high-quality, sophisticated

**Build relationships by
talking about, sharing it**

Often reflect on it

**It disappoints me*

*Makes me smarter

Stories absorb me

Grabs me visually

*Universally strong drivers

Experiences shared by both men and women

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EDITORIAL IMPLICATIONS

Insights about experiences and how they drive usage can inform editors on how to cater more effectively and relevantly to differing audience segments. The example below compares how this learning could be put to practical use.

The Media Management Center created a fictitious magazine “Gen Why.”

They crafted a number of “typical” cover lines to grab the Gen Y reader, such as:

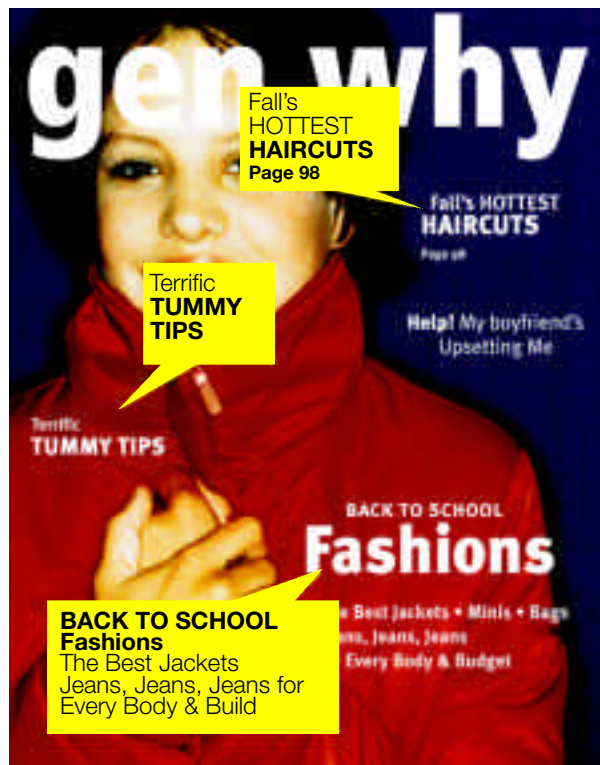
- Fall’s Hottest Haircuts
- Help! My Boyfriend’s Upsetting Me
- Terrific Tummy Tips
- Back to School Fashions
 - The Best Jackets-Mini’s-Bags-Jeans for Every Body and Budget



Highlights from the MAGAZINE READER EXPERIENCE STUDY

Taking into consideration two key reader experiences that drive Gen Y reader usage ('I build relationships by talking about it' and 'I feel good when I read it') editors could tweak these cover lines to enhance the connection with their readers. Cover lines like "Fall's Hottest Haircuts" could be changed to "Wow! Your Hair Looks Great....Hot Hairstyles for Fall."

FROM:



TO:



Additionally, the opportunity exists to enhance differentiation among "similar" magazines within a corporate portfolio.

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FOR CONSUMER MARKETING: EXPERIENCES DEEPEN TIES

Studying how consumers experience reading magazines revealed important truths about magazine connections that dispel several myths. Many of these myths are rooted in the transaction of consumer magazine buying. The Reader Experience Study shows that these transaction-based myths have little to do with the realities of consumers' experiences with magazines and have important implications. Key findings:

MYTH: Readers of magazines purchased at newsstand are “better” than subscribers.

FINDING: Across magazines, this is not the case. Reader Usage Measure (RUM) is the same whether the magazine is purchased by subscription or on the newsstand.

MYTH: Lower subscription price paid means the reader values magazines less.

FINDING: Across magazines, this is not true. RUM is unaffected by average net subscription price.

MYTH: Public-place readers have very low usage.

FINDING: Public-place magazine readers' RUM is twice that of very light readers'. This level of usage among public place readers is particularly substantial, since these readers do not own the magazine and/or have limited time with it.

MYTH: Thinner books have less usage.

FINDING: Across magazines, there is no relationship between RUM and total page count.

FINDINGS IN OTHER AREAS

MYTH: Experiences affecting readers who prefer magazines differ from those of readers who prefer TV.

FINDING: Experiences that matter most are the same for both groups. The implication of this finding is consumer marketers and editors can use a common set of experiences to increase usage among both groups.

MYTH: Consumer usage of magazines and newspapers is the same.

FINDING: Magazine RUM is comprised of time spent and frequency. Newspapers have a third consumer factor, completion, that defines usage.

Bottom line, the experience of reading a magazine is not correlated to the way consumers buy magazines. In other words, the reading experience is separate from the transaction experience.

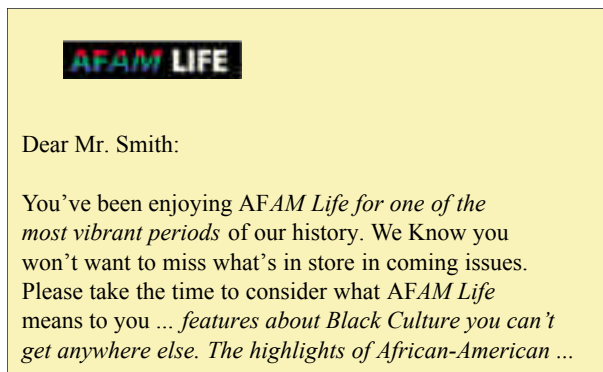
These findings allow the magazine and advertising communities to jumpstart discussions on measuring magazines. There is a need to relate reader usage and experiences to advertising exposure and other measurements. There also is a need to examine the role of readers relative to magazine buyers and consider the marketplace realities as options are evaluated. Importantly, buyers and sellers must both be involved in these discussions.

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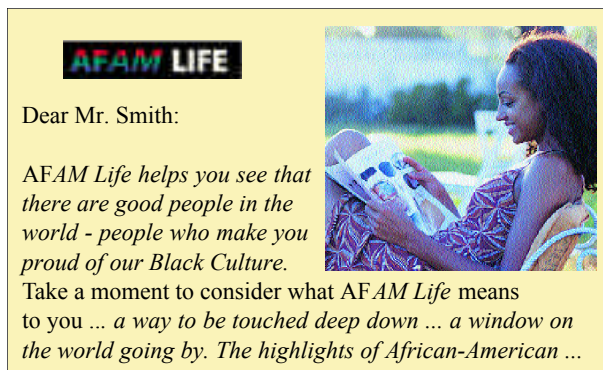
Insights gleaned from consumers' experiences can be applied to impact renewal offers. Using a consumer segment of African-Americans, Northwestern created a hypothetical example to show how a magazine might better connect with its target to drive towards more successful renewals. The research found that African-Americans were more motivated than overall readers by the following experiences:

- I'm touched
- It grabs me visually
- I get a sense of place
- I think others in household would enjoy magazine

The top overall motivators also apply, but this segment is usually less prone to turn away from reading by the inhibitor, It disappoints me. The following is a traditional-style renewal offer that the Media Management Center adapted from ones used by many magazines and re-crafted it for (a fictitious) AFAM LIFE Magazine:



Tapping into the motivators that rose to the top for African-Americans: 'I'm touched,' 'It grabs me visually,' 'I get a sense of place,' and 'I think others in household would enjoy this magazine' could strengthen the renewal offer. The Media Management Center's example for AFAM Life includes a photo that addresses the importance of visual elements and uses language that appeals to the top readers' experiences:

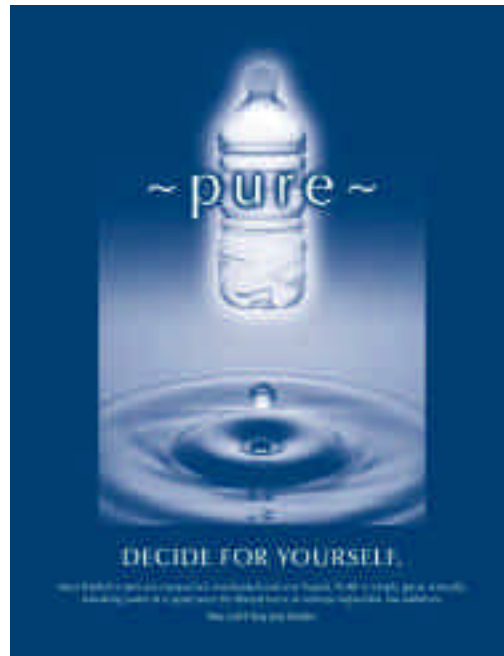


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ADVERTISING IMPACT

The study also yielded insights into ad impact. The Media Management Center developed an ad for a fictitious brand of water named “Pure” (Note: the ad was tested prior to the actual launch of a similarly named bottled water). This product was chosen because water is universally consumed and could theoretically run in any of the top MRI 100 magazines.

Survey respondents were told that the “Pure” ad was in the magazine that they read. They were probed about the ad using standard copy testing measures. The researchers screened for readers’ views of bottled water and advertising itself. Therefore, the only factor that affected ad impact was the magazine in which the advertising might appear. This is called “source effect.”



The results showed that stronger readers’ experiences lifted the ad’s impact. In other words, stronger experiences had a positive halo effect on the readers’ response to the advertising.

The chart below compares the Top RUM Drivers to the Top Ad Impact Drivers. Many experiences are common in driving usage and advertising impact; however, there are some differences among the top ten drivers and their relative rankings.

Top RUM Drivers

***I get value for my time and money**

****It disappoints me***

*It makes me smarter

It’s my personal timeout

I often reflect on it

The stories absorb me

I learn things first here

It’s part of my routine

I find magazine high-quality, sophisticated

I trust it

Top 10 Ad Impact Drivers

The stories absorb me

I like some ads a lot

I find magazine high-quality, sophisticated

I often reflect on it

*It makes me smarter

I trust it

I learn things first here

It improves me and helps me try new things

I feel good when I read about it

It’s my personal timeout

*Universally strong drivers

Experiences shared by both men and women

Experiences unique to each group

Inhibitors

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By understanding and leveraging the knowledge of the relative rankings of experiences for both RUM and Ad Impact, advertisers can apply the knowledge toward better ad placements and creative.

For ad placement, if, for example, the experiences of 'I trust it' and 'I learn things first here' rank high for a particular consumer segment, ad impact could be strengthened by adjacencies to news and information edit, particularly if the reader experiences relate to the brand's attributes and/or advertising strategy.

CREATIVE IMPLICATIONS

Possibilities also exist for strengthening connections for advertising creative, as demonstrated in an example adapted by the Media Management Center for Wendy's. The actual, excellent ad (on the left) promotes their late night pick-up window, focusing on the product. If an agency wanted to direct its message towards Gen Y Women (who have a strong experience of sharing and relationships), the resulting ad might look like the one on the right that features sharing and shows a social situation in the graphic and language of the ad.

ACTUAL AD



POSSIBLE ALTERNATIVE



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SUMMARY

This groundbreaking study of the consumers' magazine experiences will continue to generate findings of major import to the magazine and advertising communities.

Key findings to date include:

- Reading magazines involves rich set of multi-dimensional experiences
- Experiences motivate or inhibit reading
- Magazines with stronger experiences have greater usage
- Stronger reader experiences lift ad impact
- Experiences can be used to enhance effectiveness of editorial, advertising and consumer marketing

NEXT STEPS

Findings from this research will continue to be communicated to MPA member magazines and the advertising community.

Northwestern University is developing and will share a suite of tools that will enable MPA member magazines to study their individual readerships for experiences and their Reader Usage Measure (RUM).

Additionally, the magazine community will work with the advertising community to jump-start a dialogue on magazine metrics.

MPA will continue to work closely with Northwestern's Media Management Center to further mine this data for new and important findings.

Clearly, this study marks a new step in understanding the dynamics of consumer involvement with media – in this case, magazines. MPA challenges the other media to study their own consumers' usage and experiences.

APPENDIX

The 39 Reader Experiences
and Their Descriptors
That Drive Usage

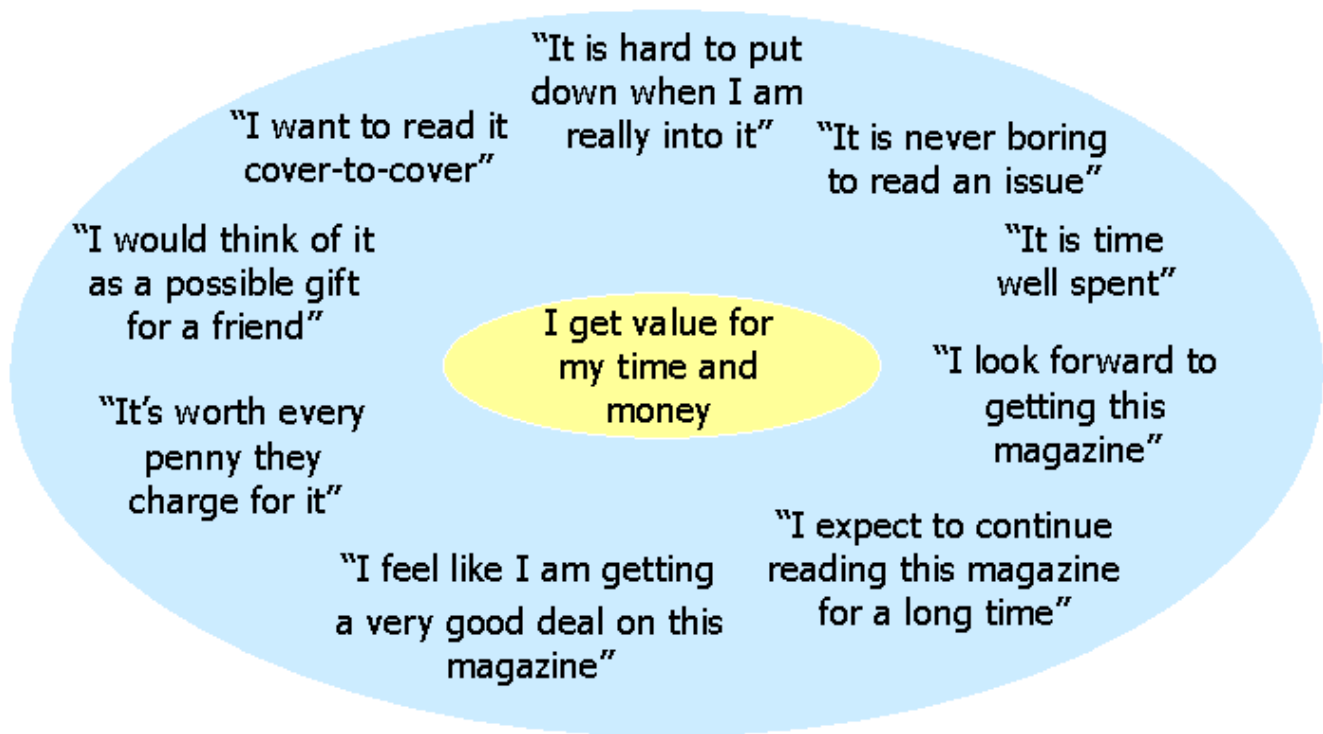
In rank order based on ties to readership

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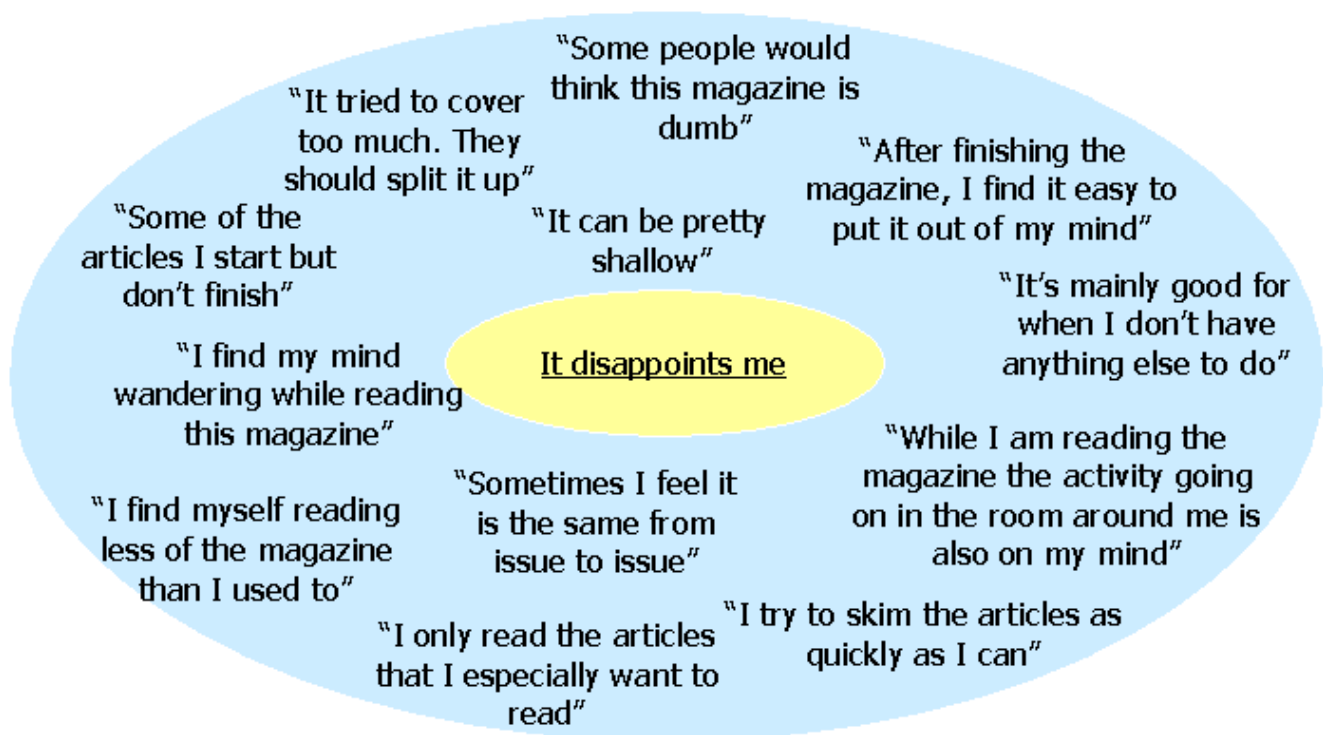
THE 39 READER EXPERIENCES THAT DRIVE USAGE

OVERALL RANK	EXPERIENCE
1	I get value for my time and money
2	<i>It disappoints me</i>
3	It makes me smarter
4	It's my personal timeout
5	I often reflect on it
6	The stories absorb me
7	I learn things first here
8	It's part of my routine
9	I find the magazine high-quality and sophisticated
10	I trust it
11	I feel good when I read it
12	It's relevant and useful to me
13	It's brief and easy for me to read
14	I build relationships by talking about and sharing it
15	I find unique and surprising things
16	It improves me, and helps me try new things
17	I save and refer to it
18	I keep or share articles
19	I think others in the household would enjoy the magazine
20	It's for people like me
21	It grabs me visually
22	I'm inspired
23	I get a sense of place
24	I'm touched
25	I feel I know the writers
26	I like seeing people of color in this magazine
27	<i>This magazine irritates me</i>
28	I like its seasonality
29	I like some of the ads a lot
30	<i>I dislike some of the ads</i>
31	It helps me keep track of celebrities
32	I relate to the ads
33	It requires me to focus
34	I read the ads
35	It reinforces my faith
36	It helps me look good; it's sensual, even sexy
37	I want more ad information
38	This magazine's Web site is important to me
39	<i>It leaves me feeling bad</i>

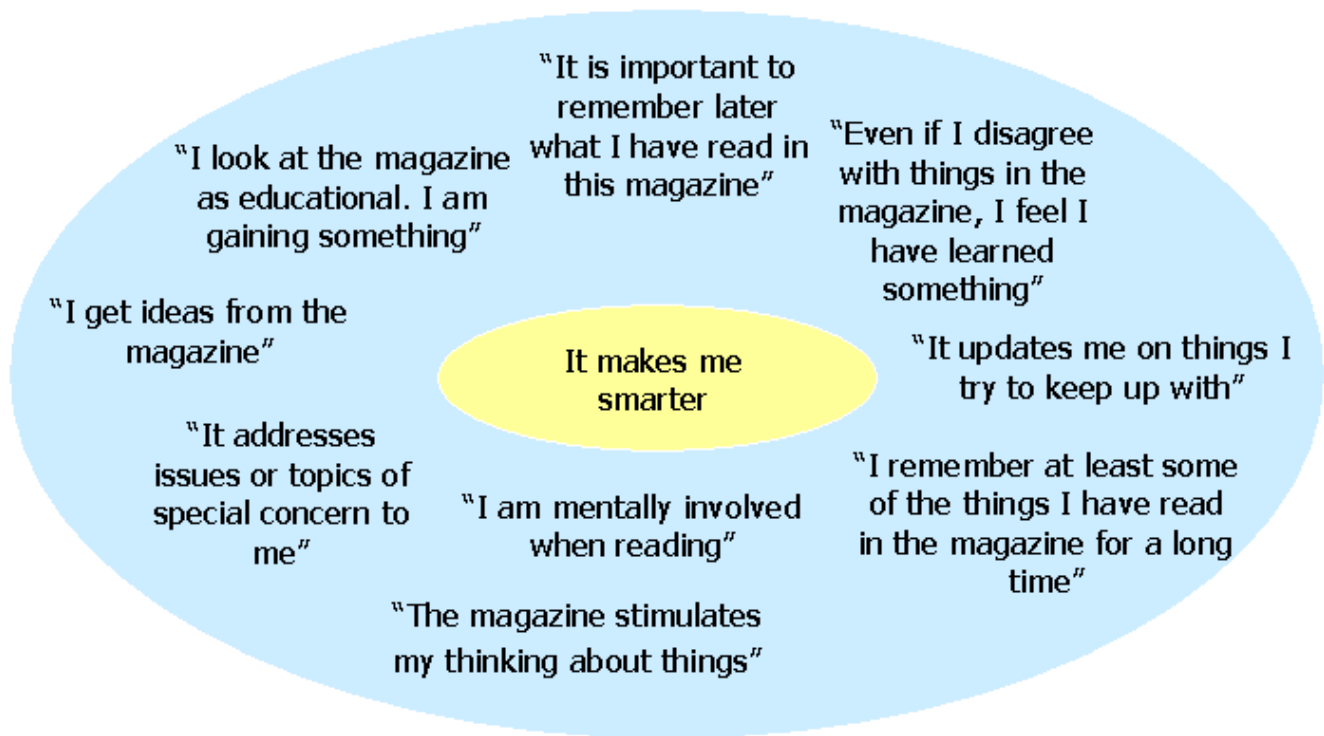
Descriptors for Top Experience that Drives Usage



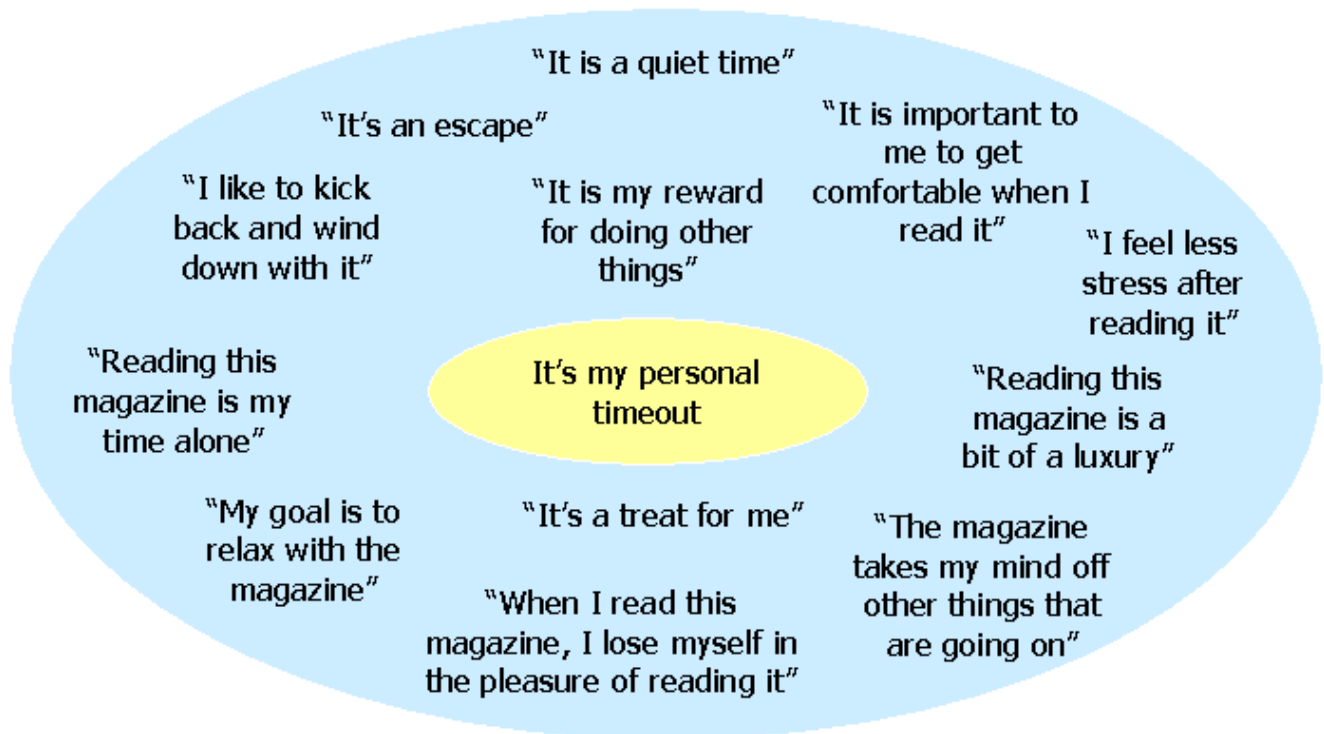
Descriptors for Second Experience that Drives Usage



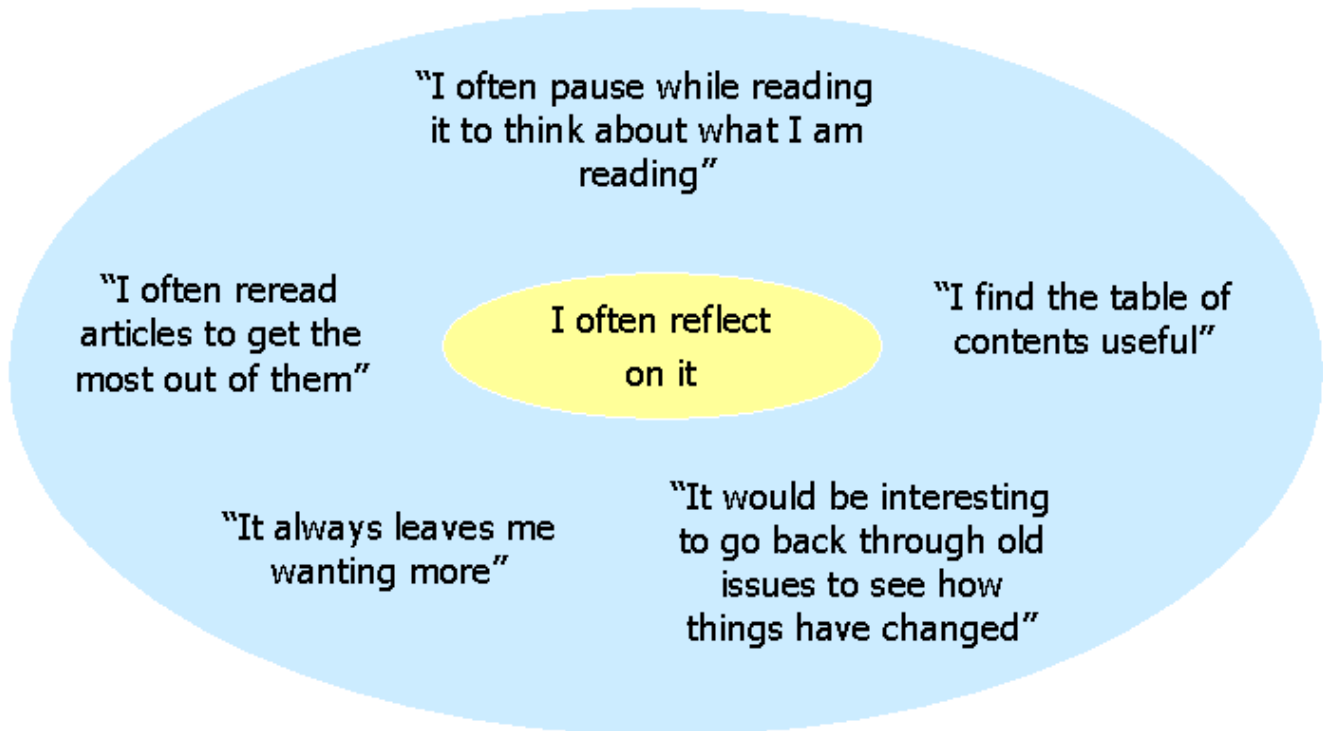
Descriptors for Third Experience that Drives Usage



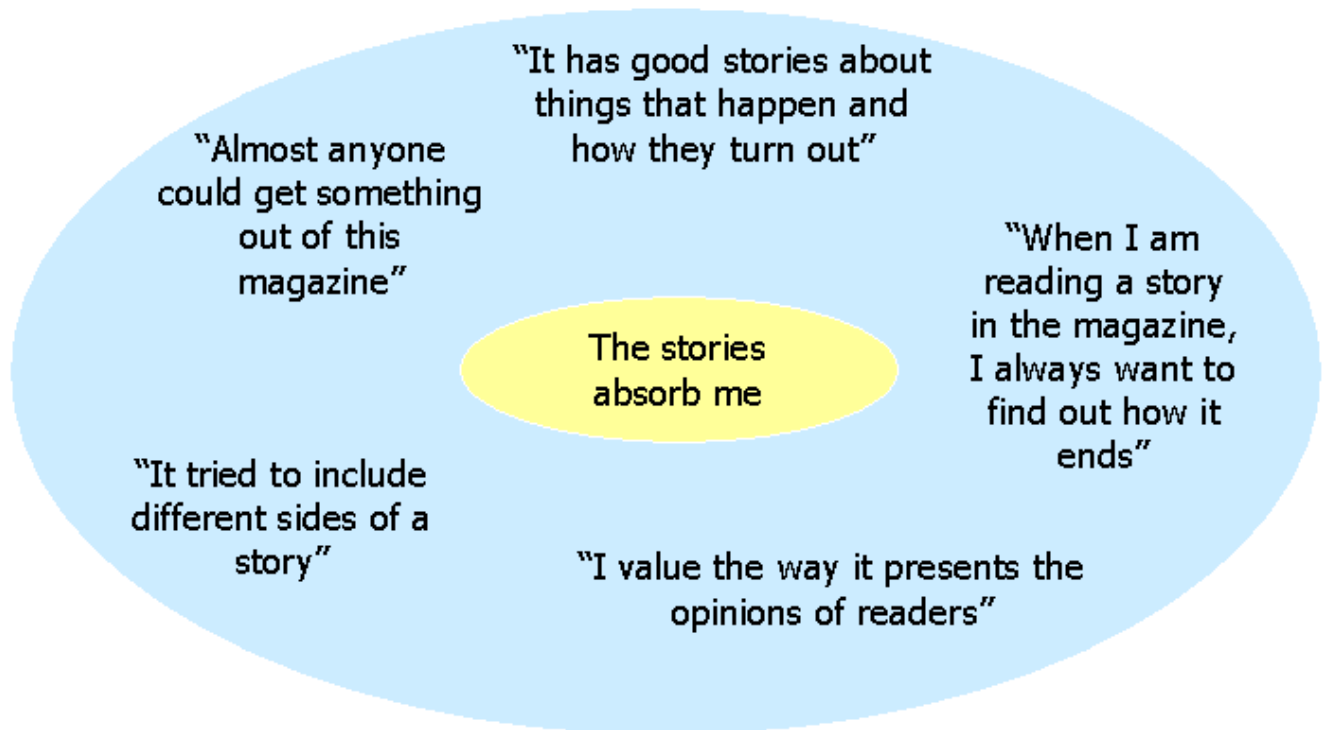
Descriptors for Consumer Experience 4



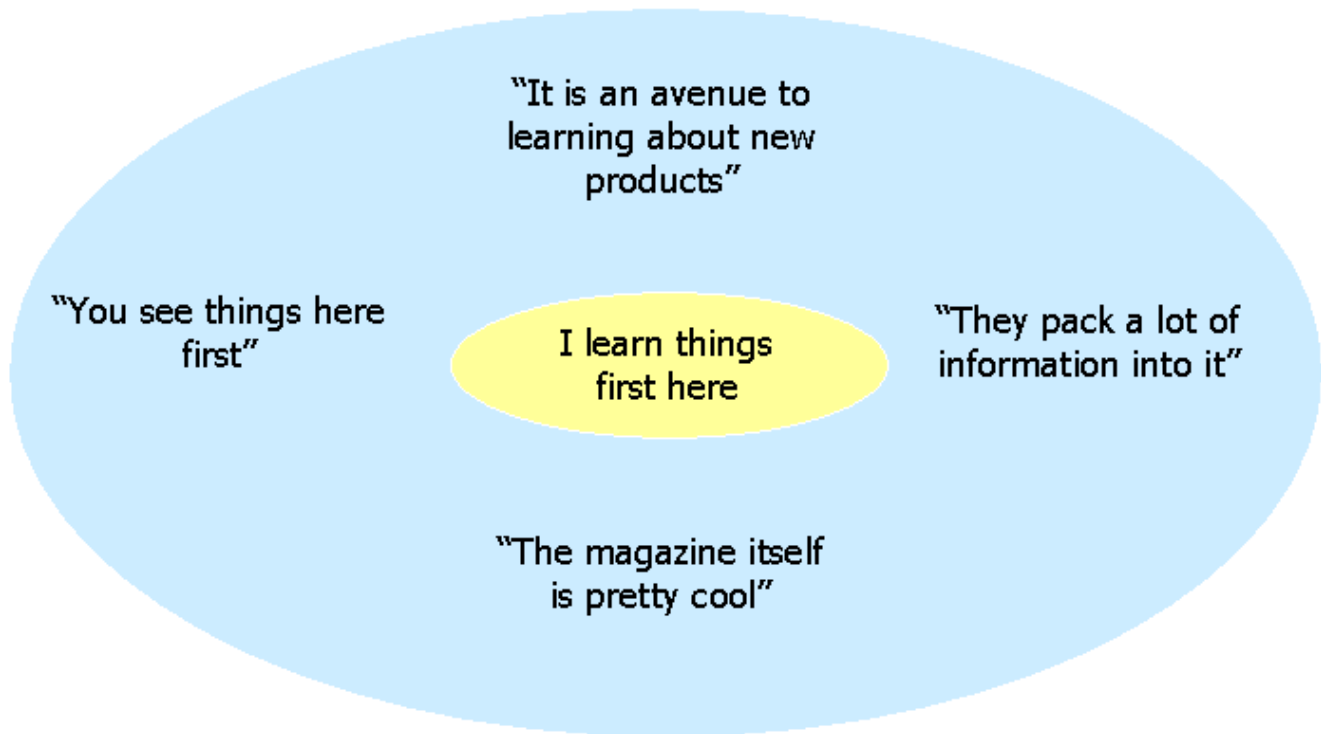
Descriptors for Consumer Experience 5



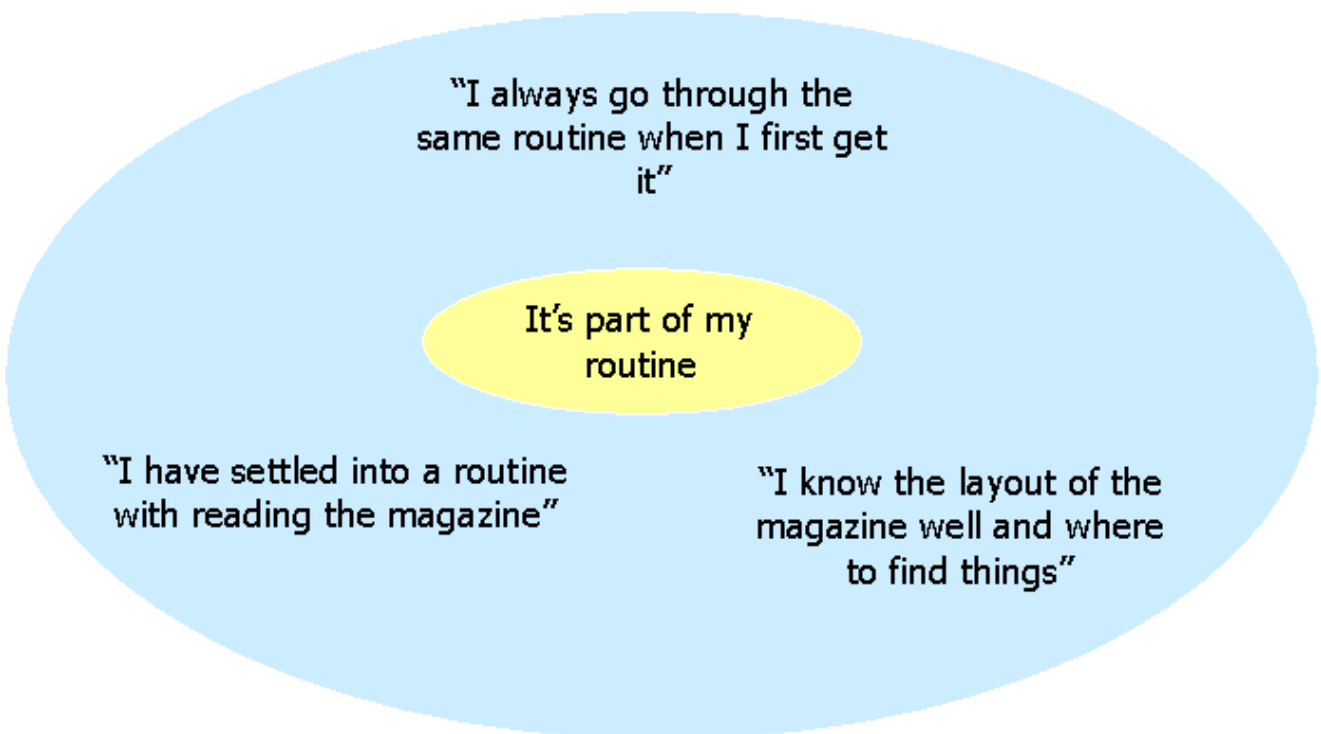
Descriptors for Consumer Experience 6



Descriptors for Consumer Experience 7



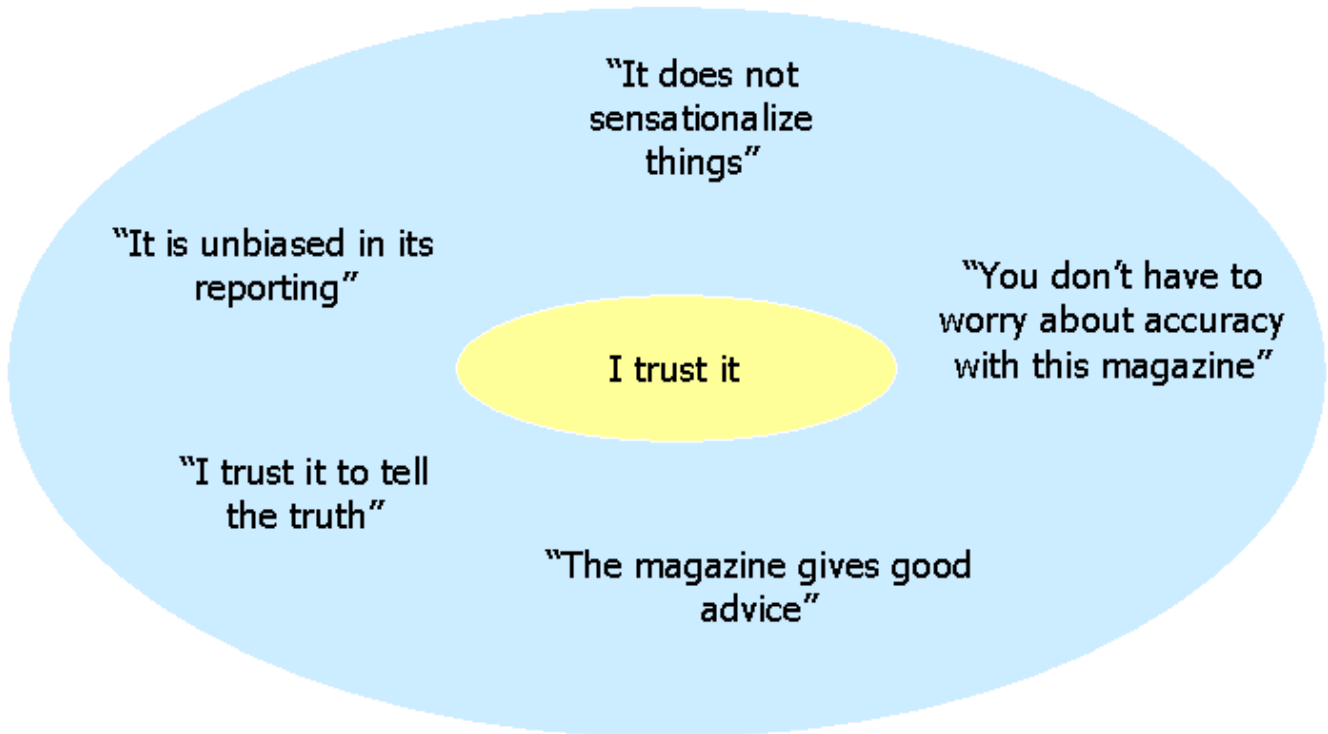
Descriptors for Consumer Experience 8



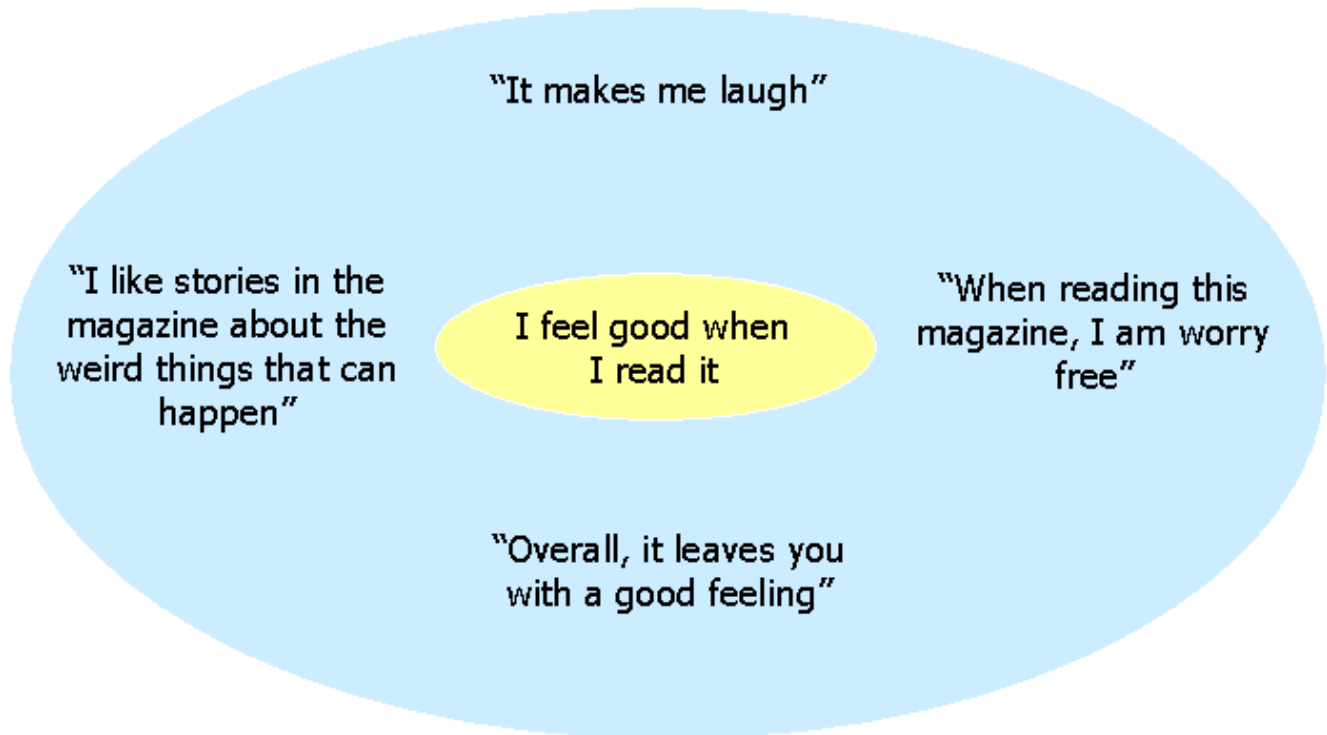
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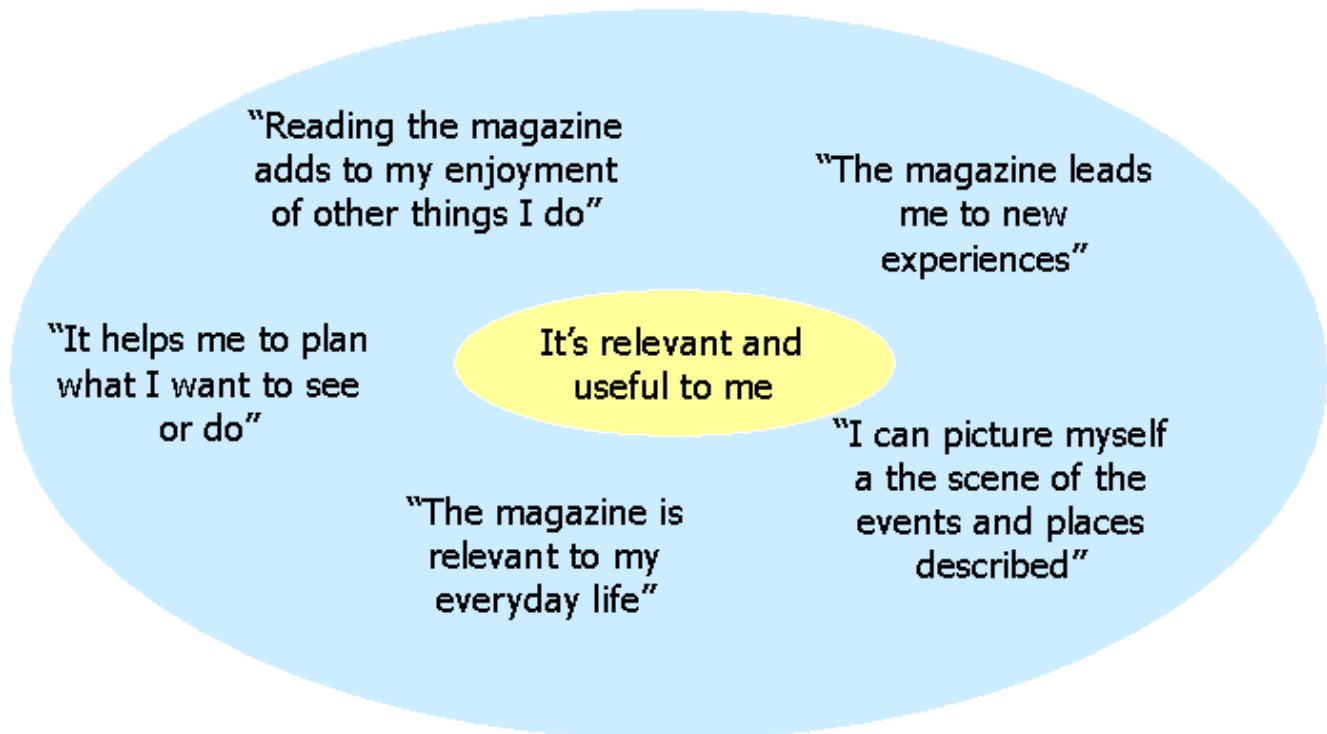
Descriptors for Consumer Experience 10



Descriptors for Consumer Experience 11



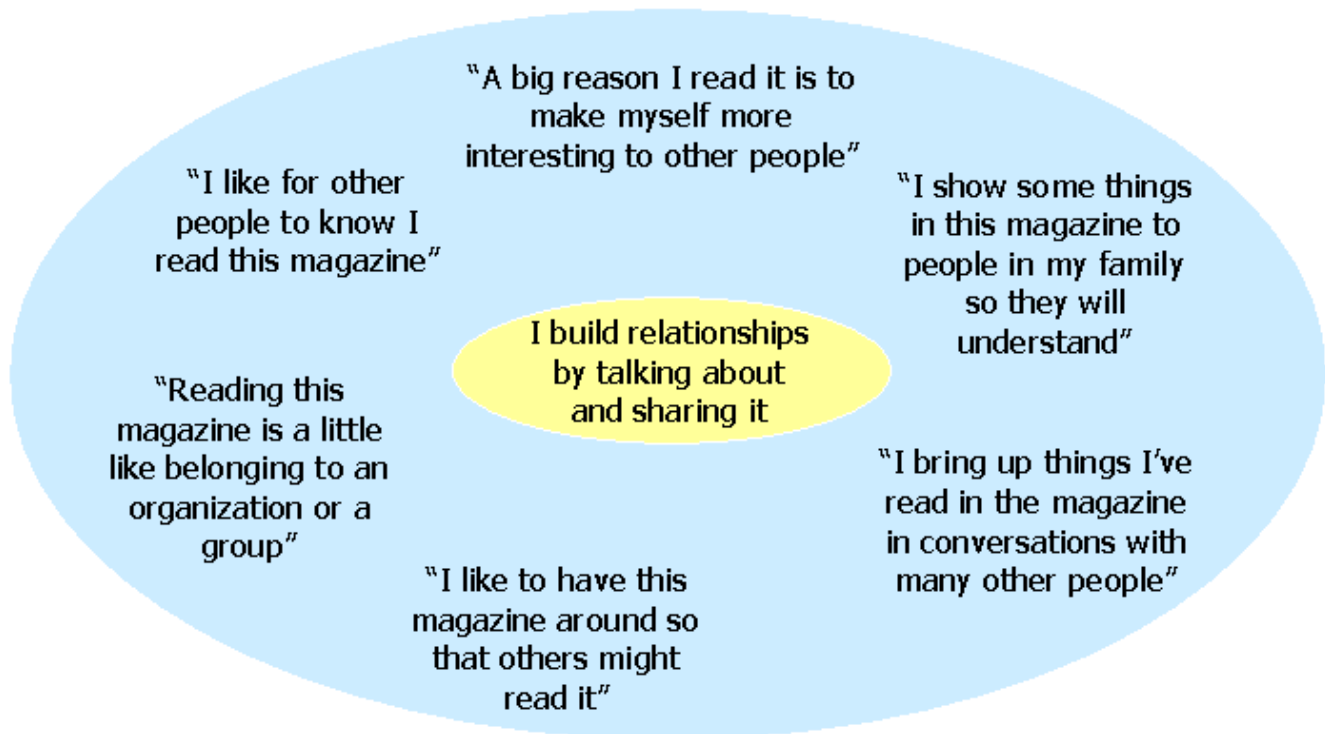
Descriptors for Consumer Experience 12



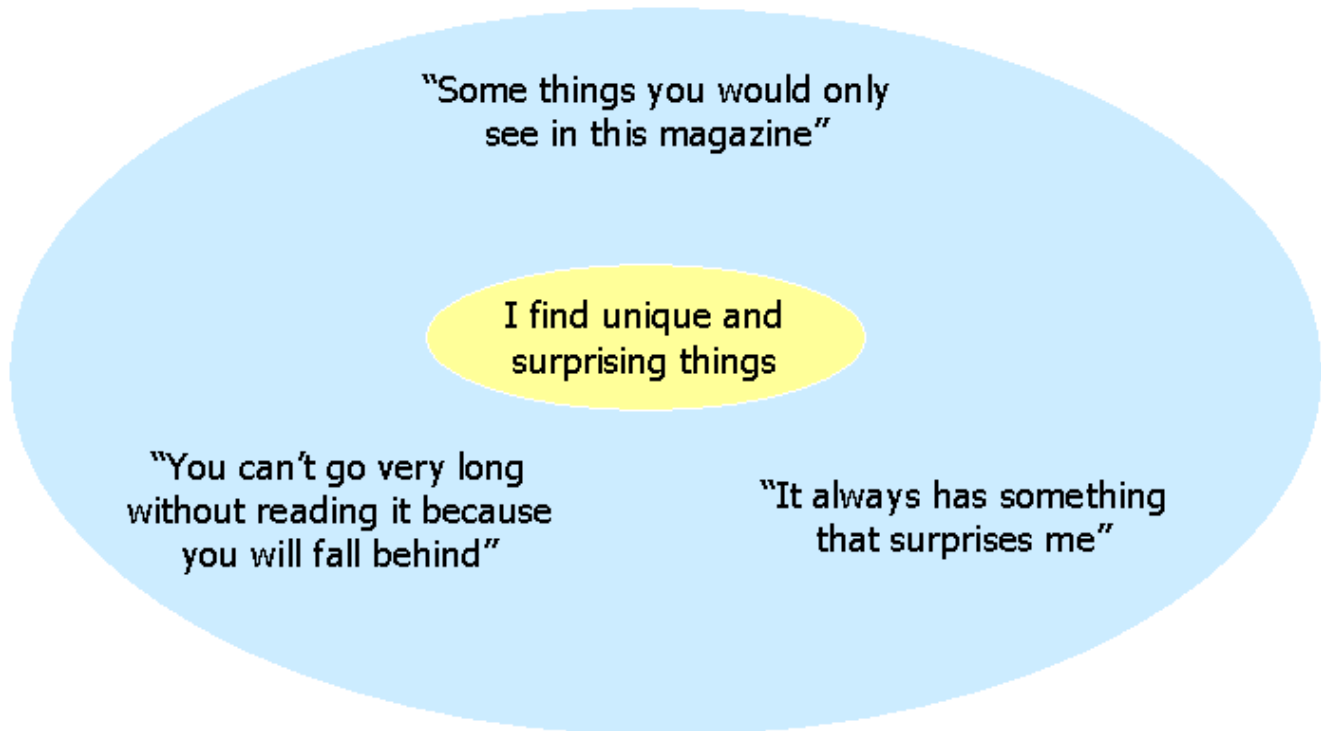
Descriptors for Consumer Experience 13



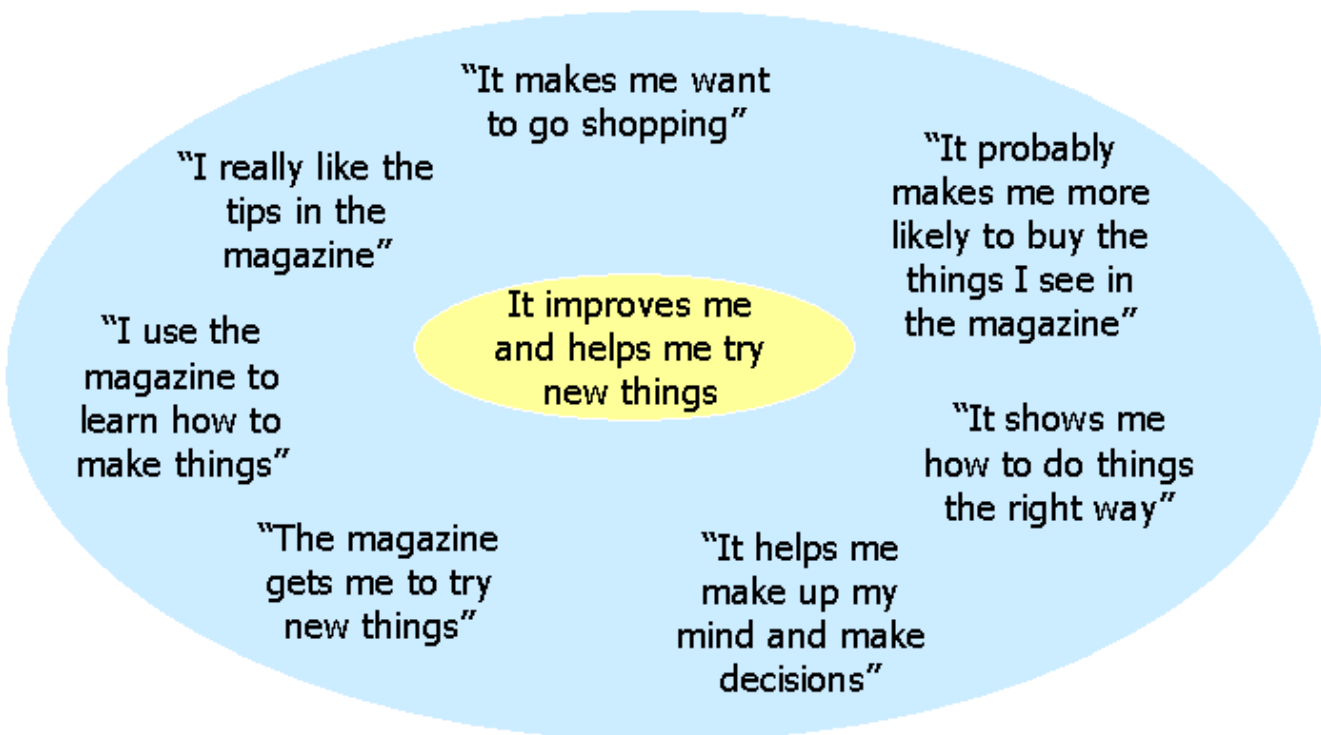
Descriptors for Consumer Experience 14



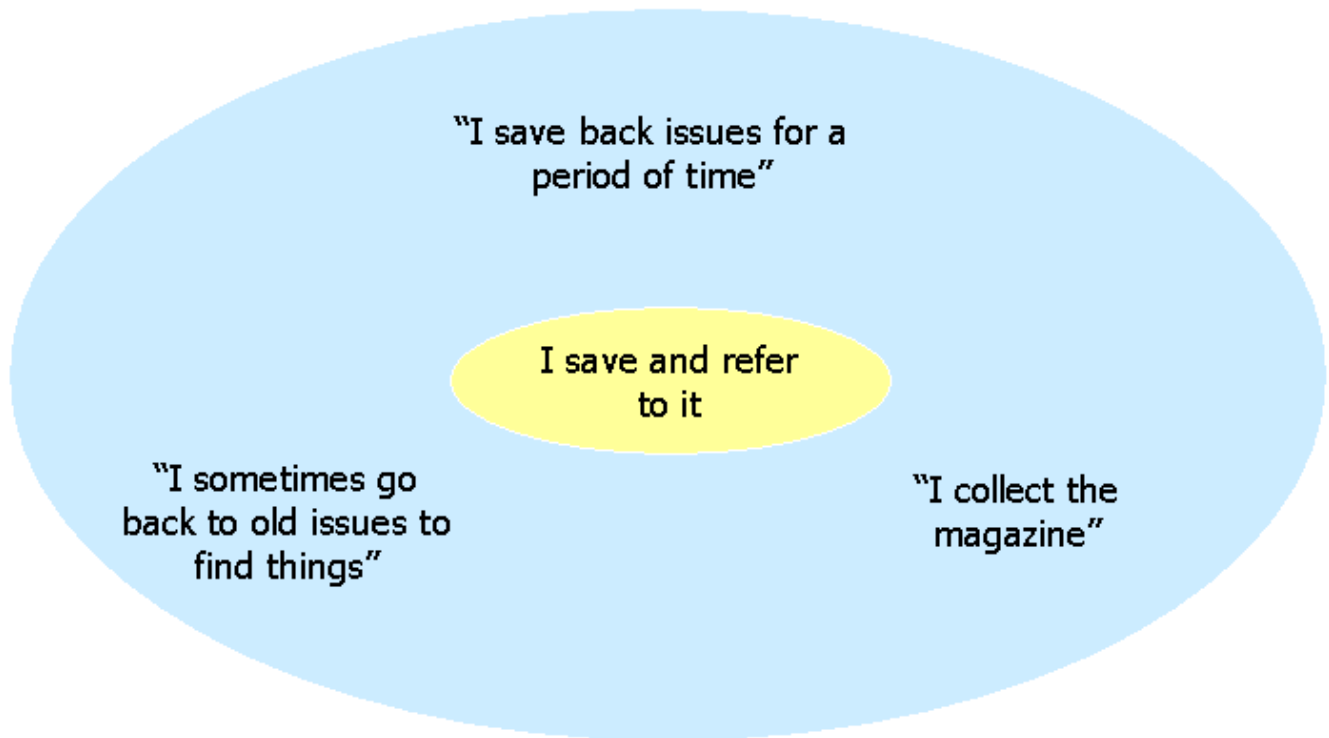
Descriptors for Consumer Experience 15



Descriptors for Consumer Experience 16



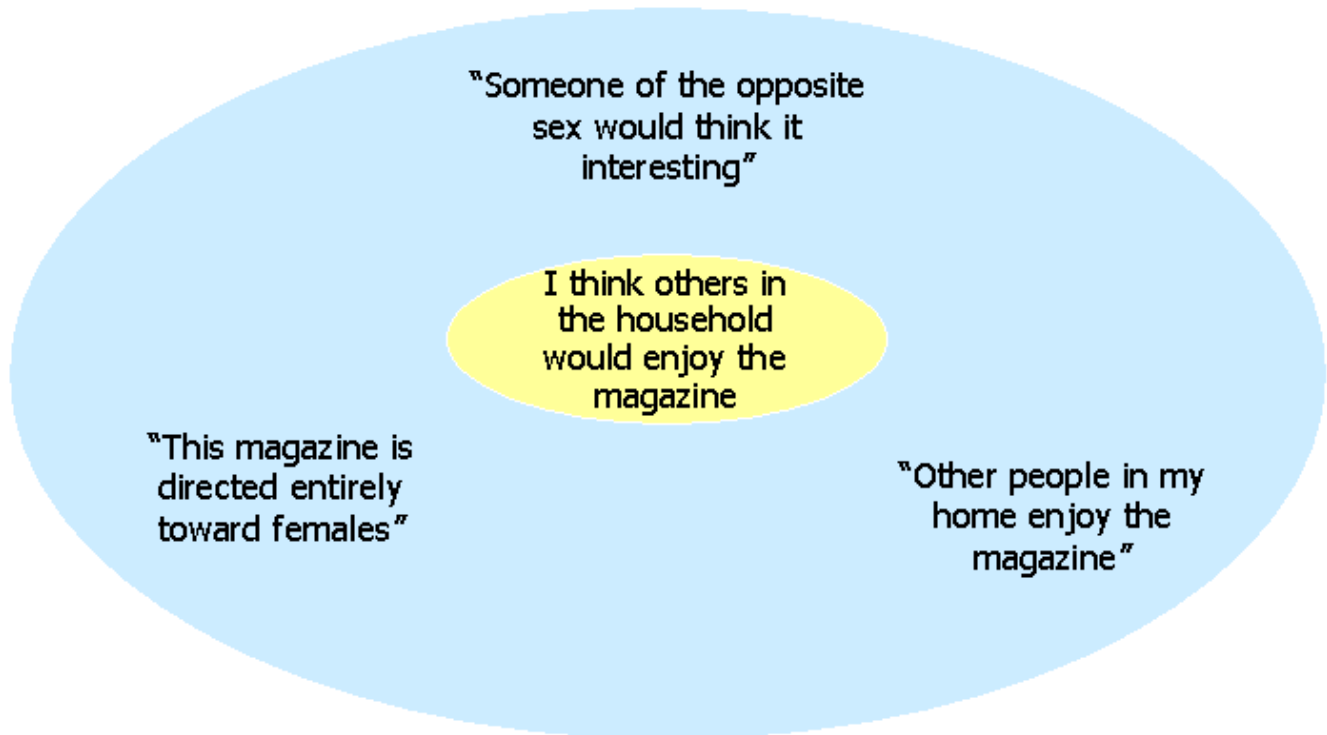
Descriptors for Consumer Experience 17



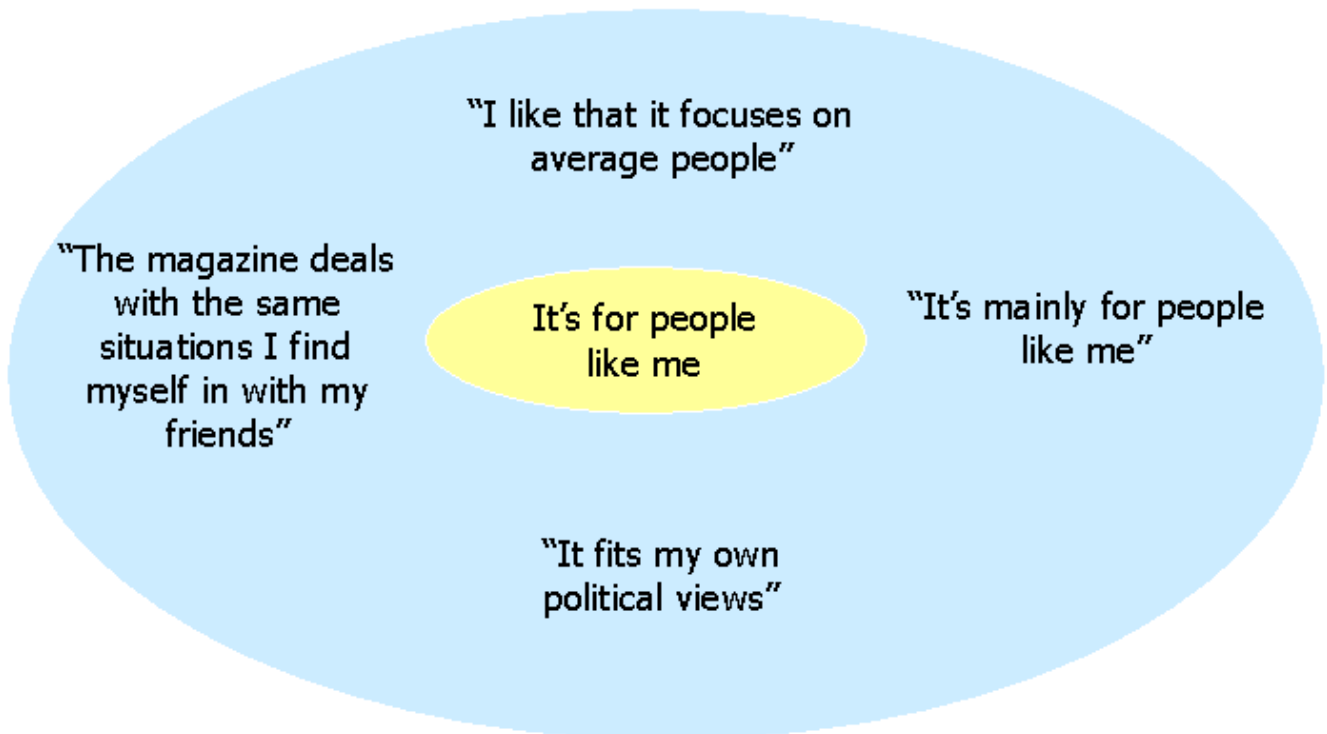
Descriptors for Consumer Experience 18



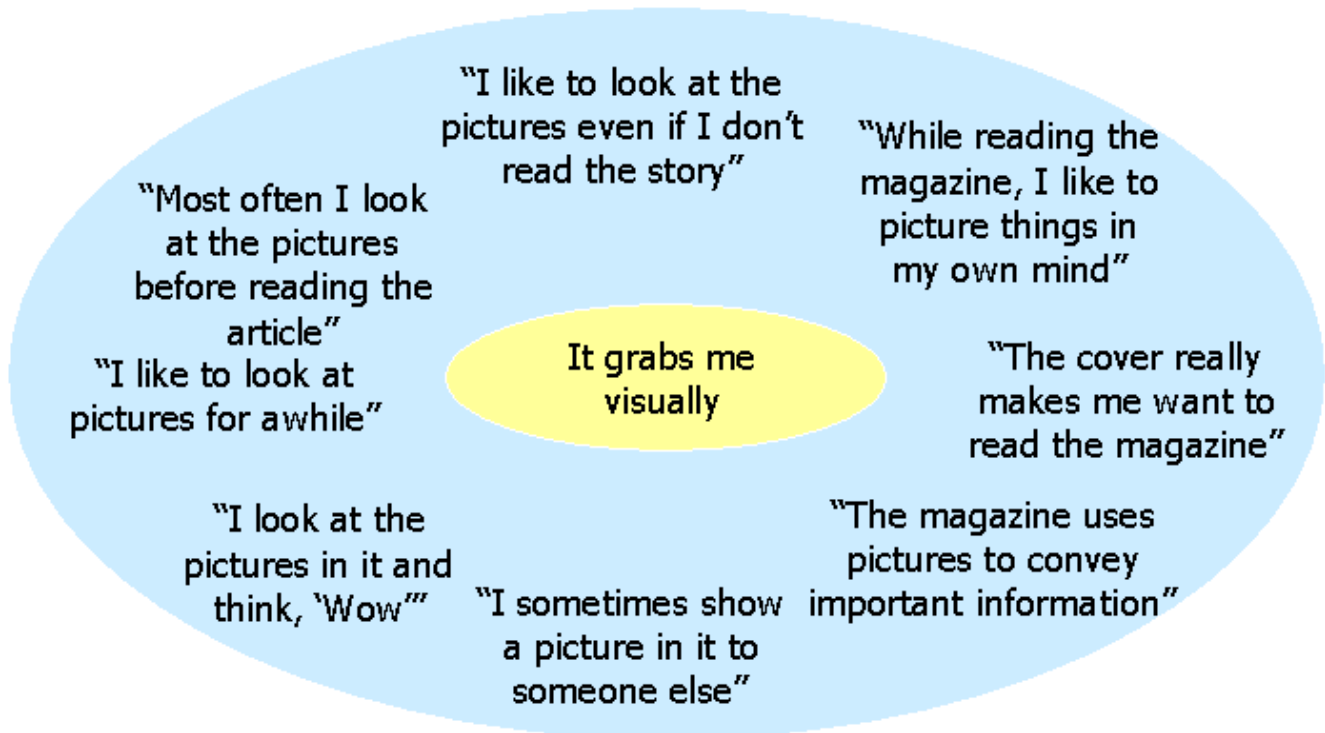
Descriptors for Consumer Experience 19



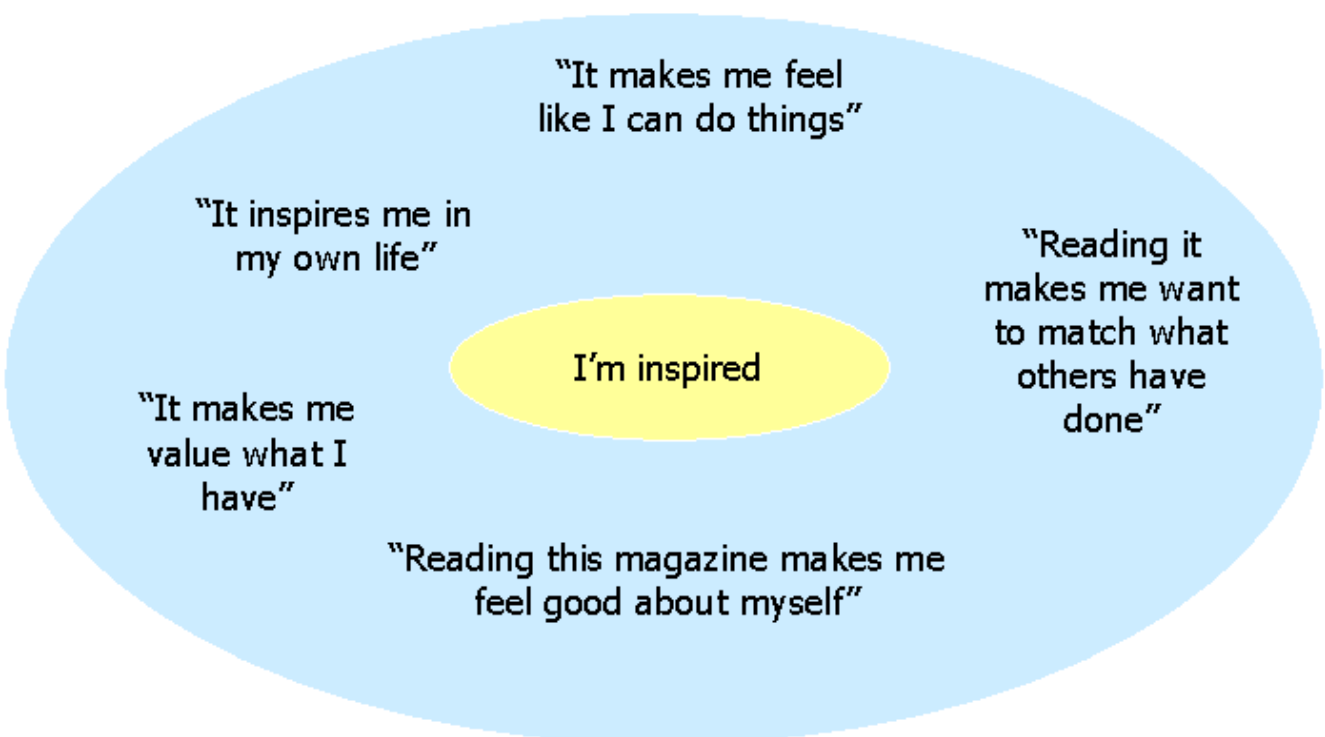
Descriptors for Consumer Experience 20



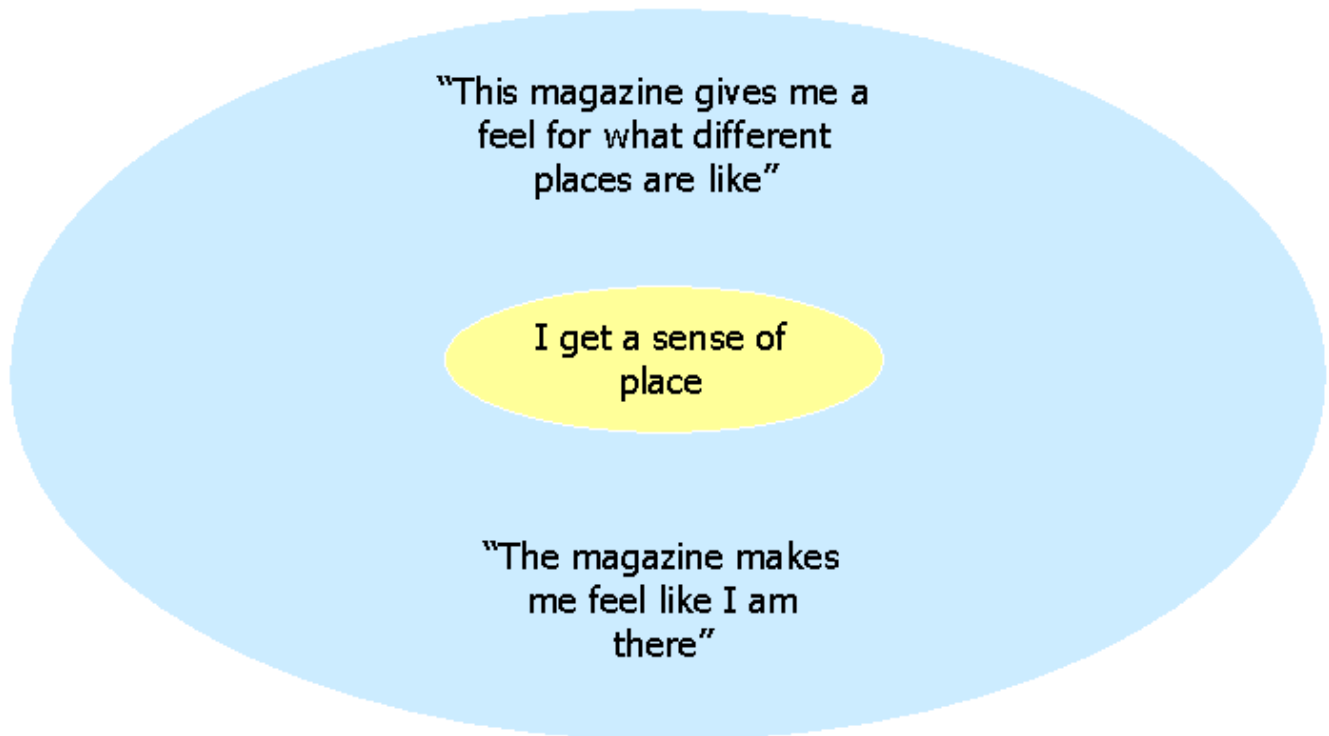
Descriptors for Consumer Experience 21



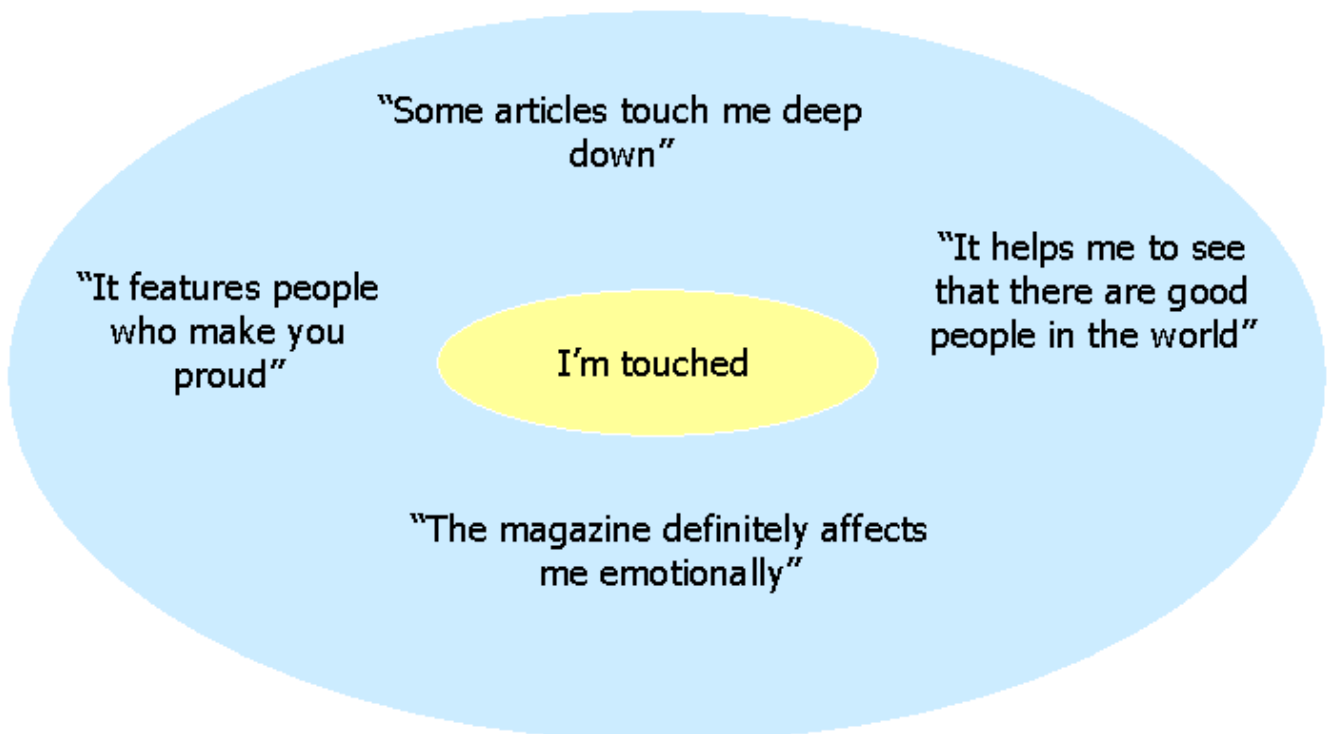
Descriptors for Consumer Experience 22



Descriptors for Consumer Experience 23



Descriptors for Consumer Experience 24



Descriptors for Consumer Experience 25

"I look forward to reading
certain writers in the
magazine"

I feel I know the
writers

"I feel like I get to
know the people
writing the articles"

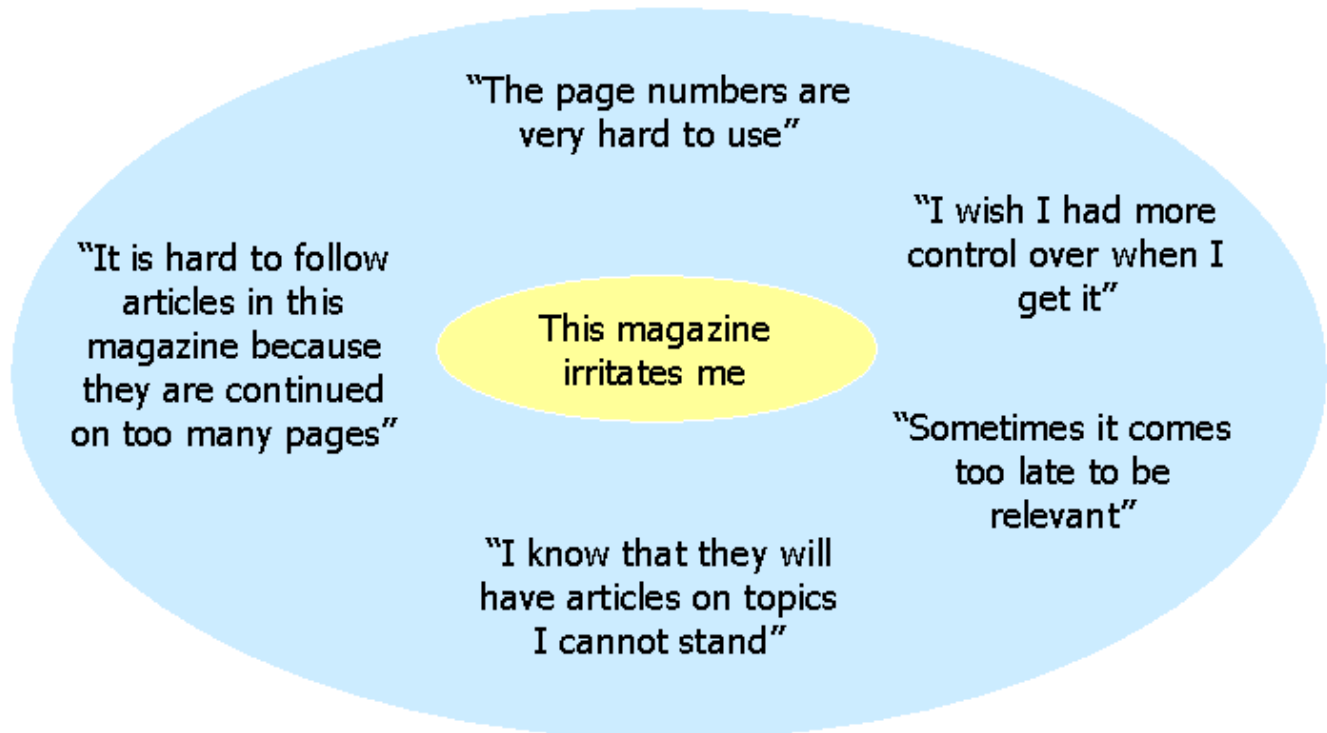
Descriptors for Consumer Experience 26

"I like seeing people of
color in this magazine"

I relate to people
of color

"This magazine includes
people of color"

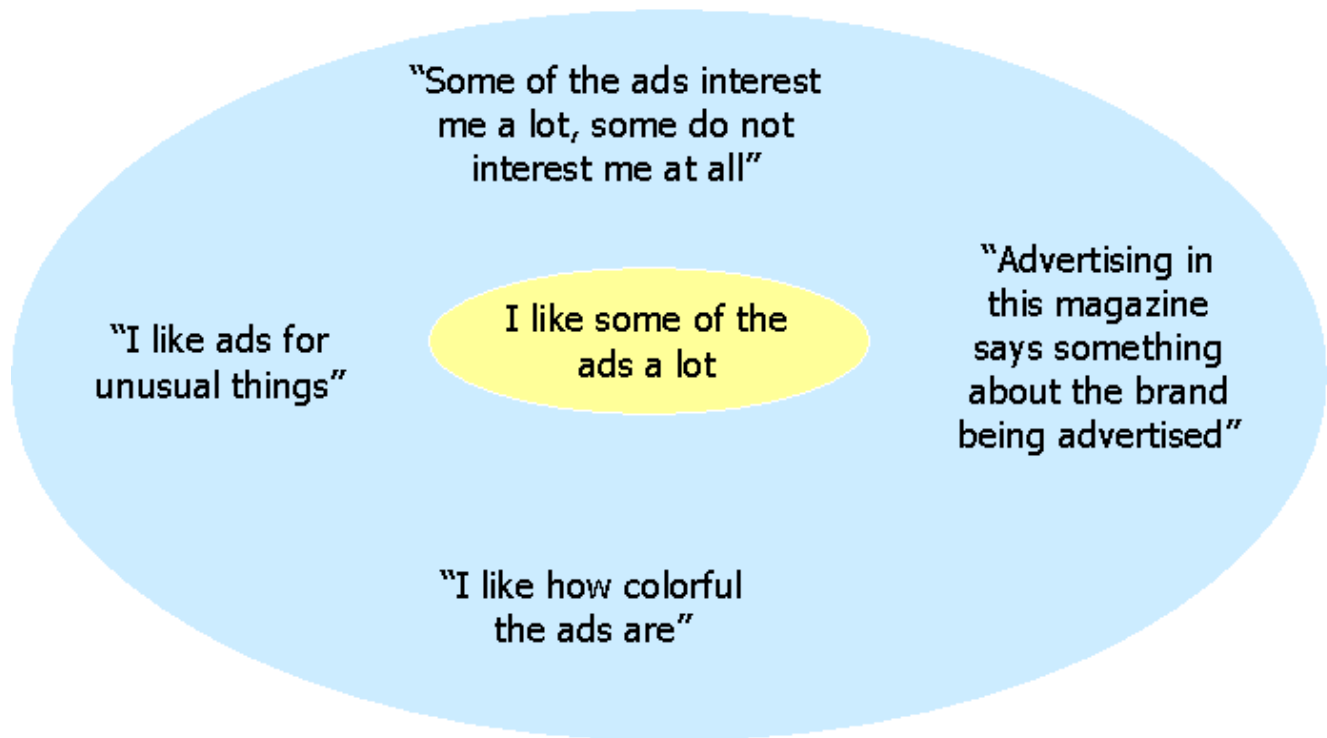
Descriptors for Consumer Experience 27



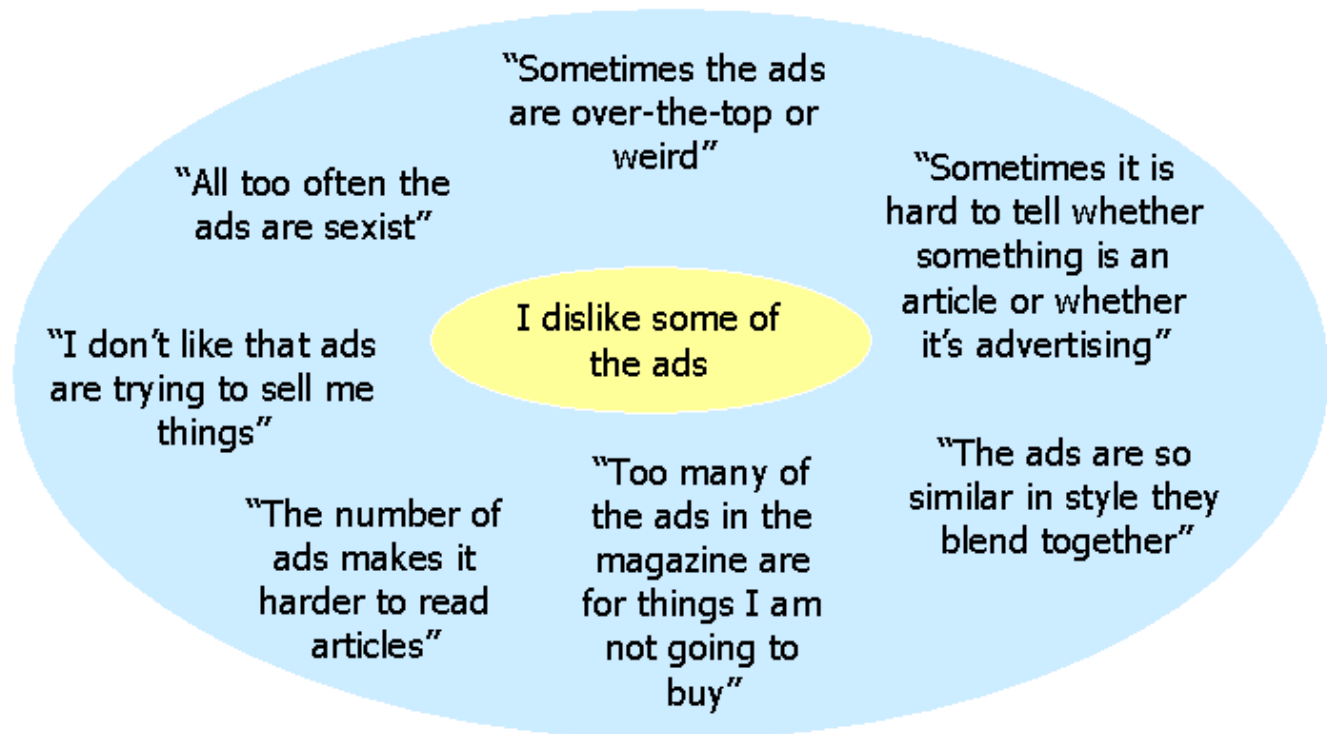
Descriptors for Consumer Experience 28



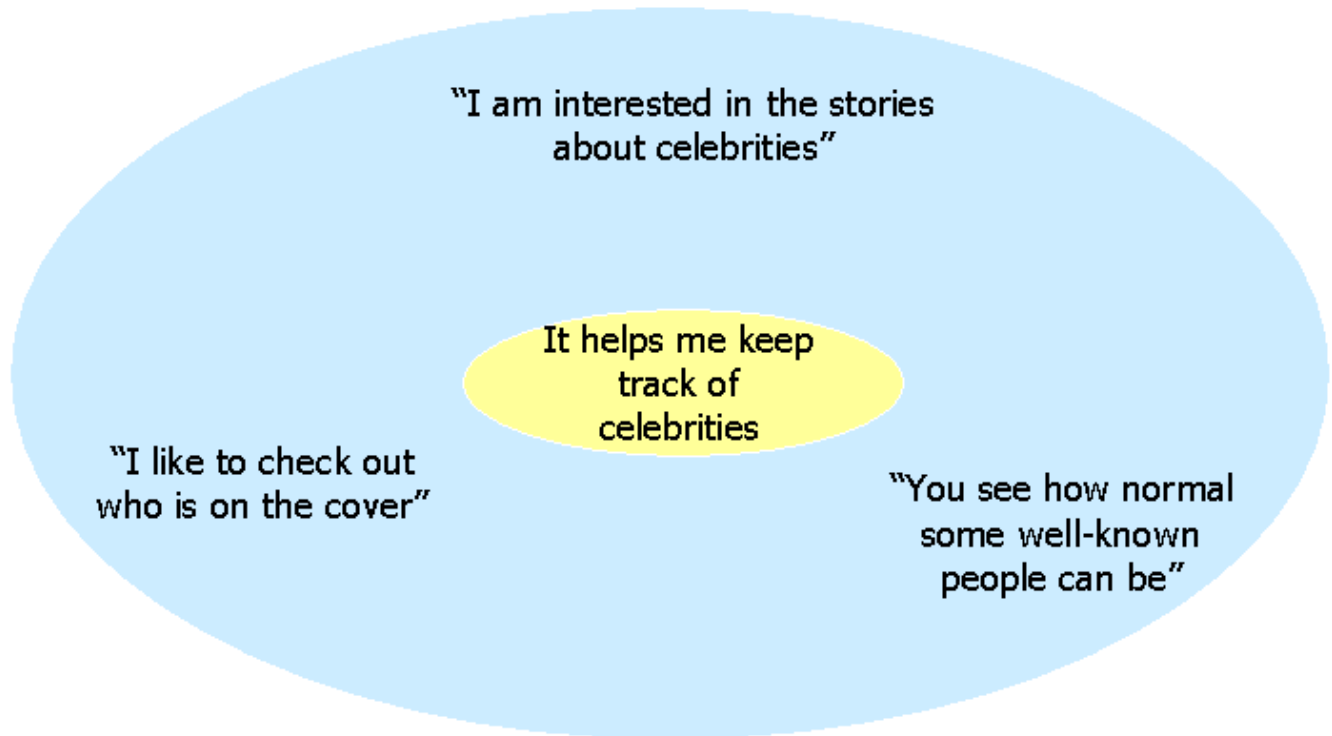
Descriptors for Consumer Experience 29



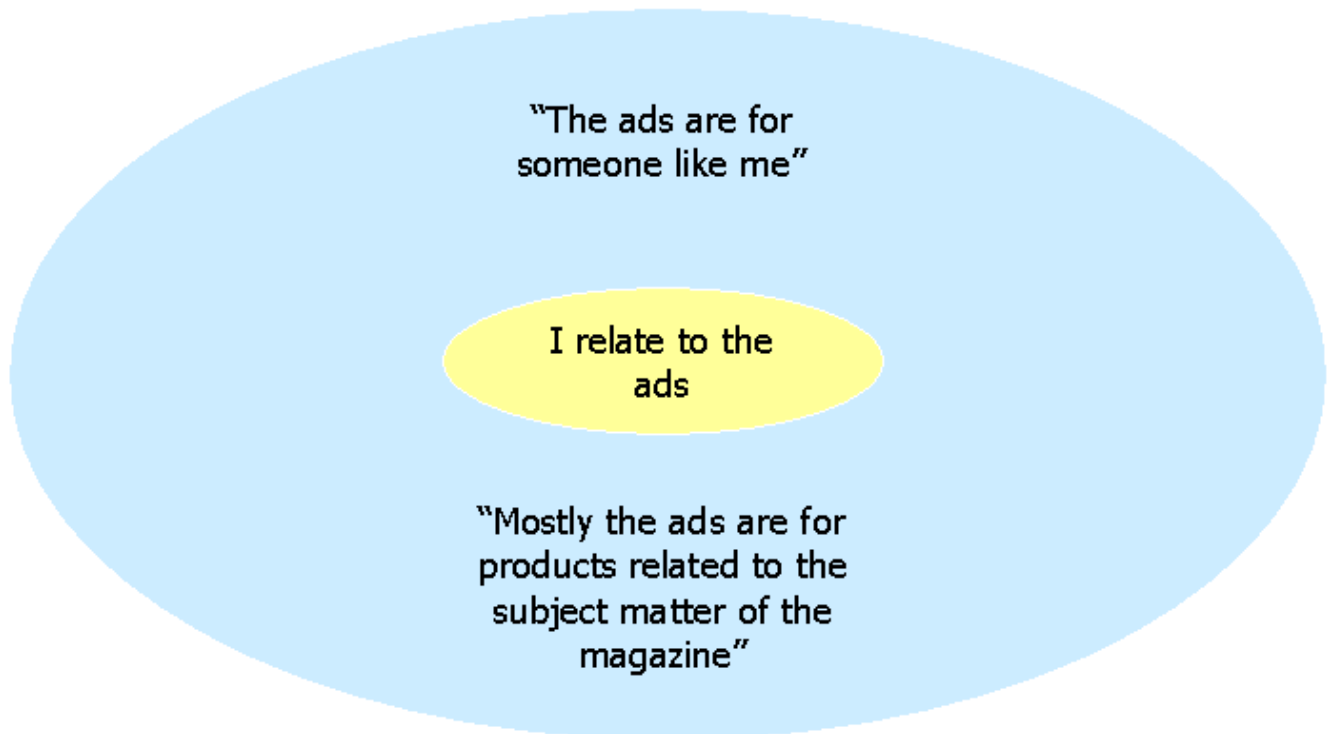
Descriptors for Consumer Experience 30



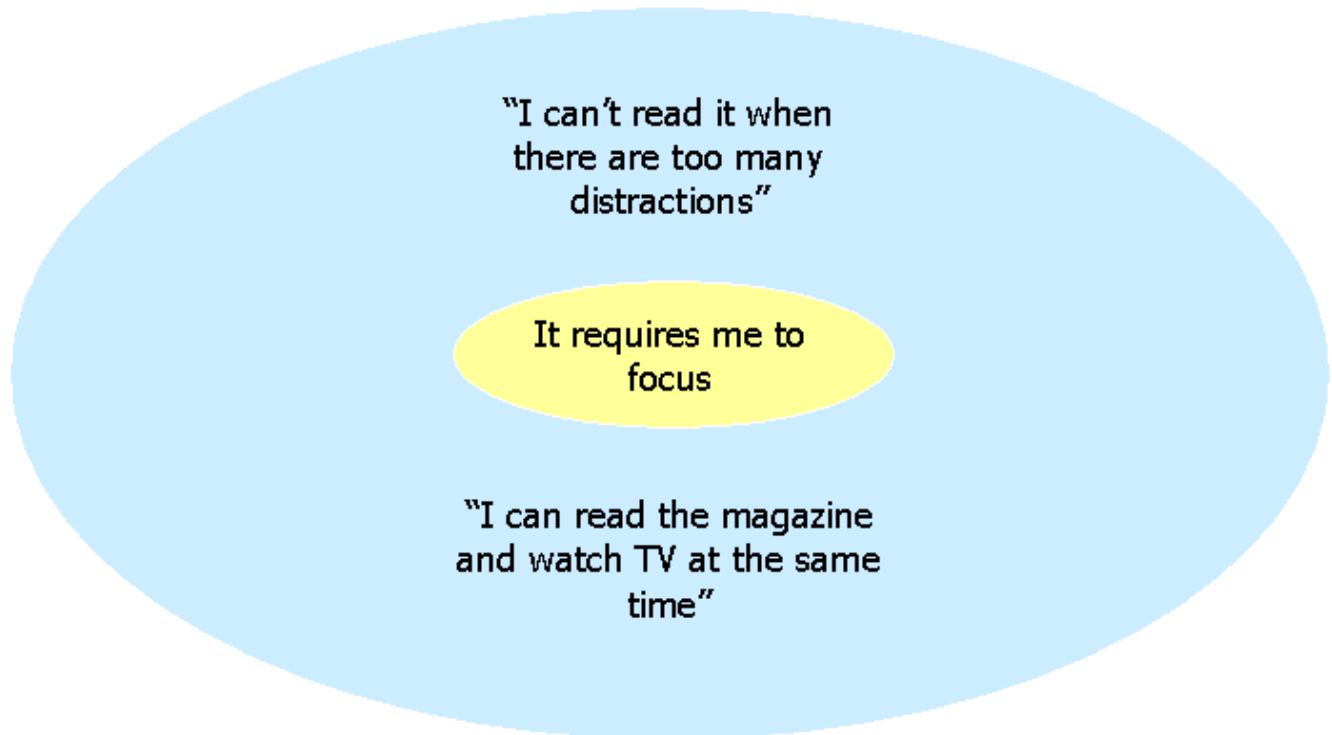
Descriptors for Consumer Experience 31



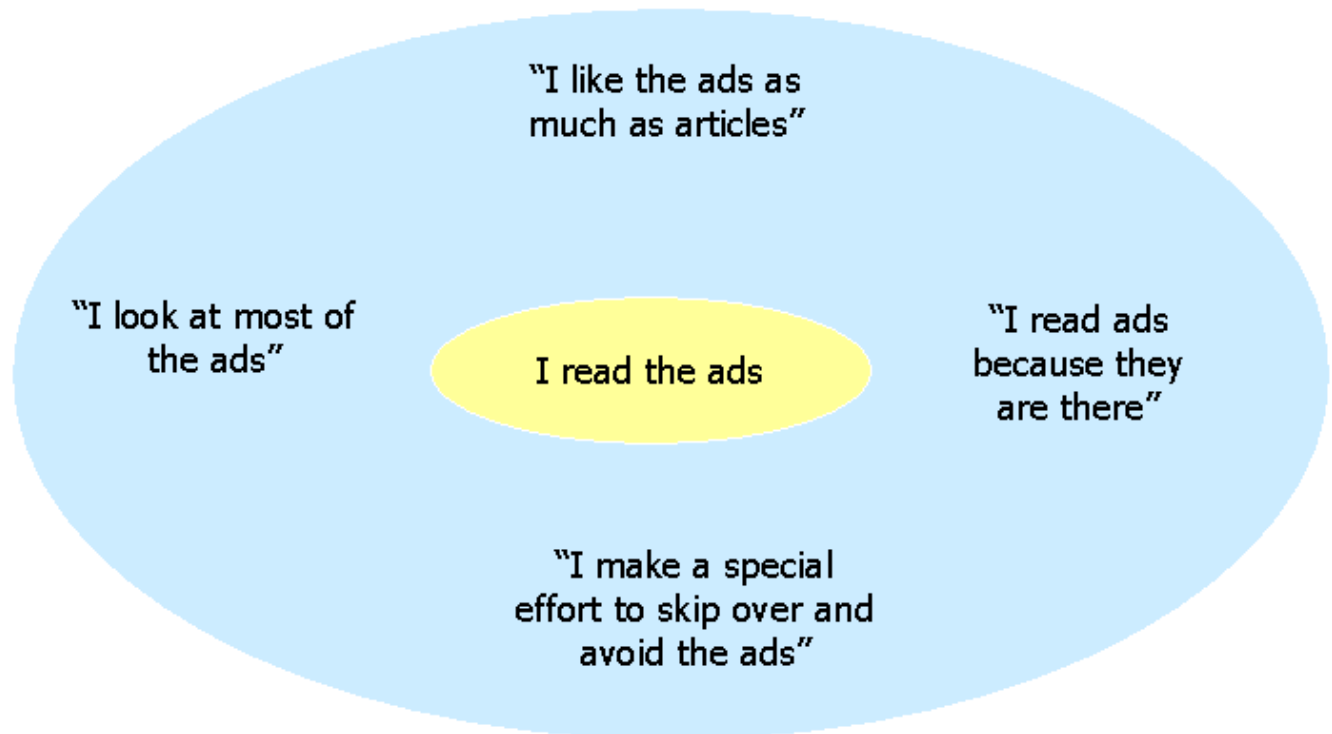
Descriptors for Consumer Experience 32



Descriptors for Consumer Experience 33



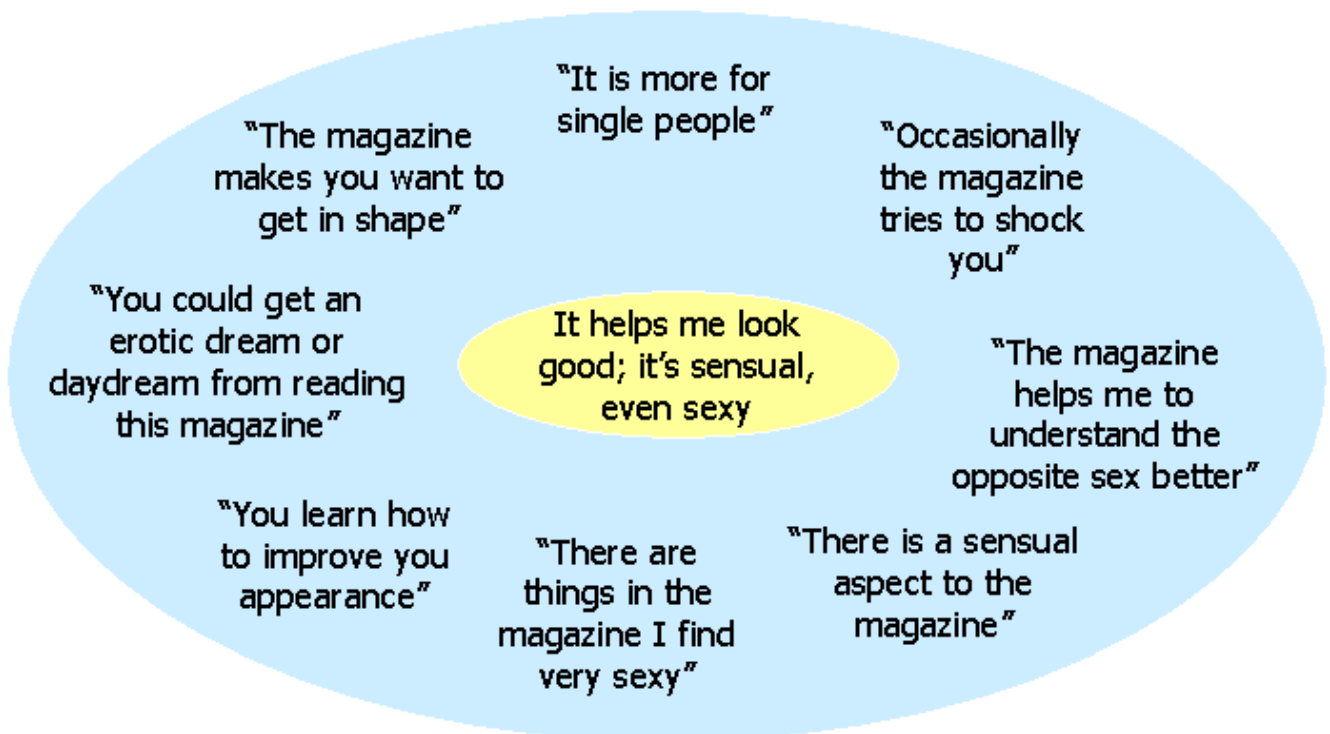
Descriptors for Consumer Experience 34



Descriptors for Consumer Experience 35



Descriptors for Consumer Experience 36



Descriptors for Consumer Experience 37

"The ads could use more information about where to buy things"

I want more ad information

"The ads should include more information about prices"

Descriptors for Consumer Experience 38

"I sometimes use the internet to follow up on things I have read about in the magazine"

"For me, the magazine's web site is an important part of the magazine"

This magazine's web site is important to me

"I read the magazine less in print than before because of the internet"

Descriptors for Consumer Experience 39

"Some of the stories
make me feel bad"

It leaves me
feeling bad

"I worry about
what I am
reading about"