The DNA of the new magazine reader - ORVESTO QRS 2013

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Innehåll

1. Introduction

Print media is up for their by far most demanding and critical challenges since the days of Gutenberg. A completely new media landscape has fundamentally changed media's role from distributors of information to critical assets of life management.

Even if printed copies of magazines still hold a strong position in a number of traditional fields, the Swedish magazine industry as a whole is under extreme pressure. The financial consequences of rapidly declining subscription levels and a most often devastatingly weak digital strategy which fails to compensate the analogue downfall is crippling business.

Many publishers agree this is the moment to act decisively and firmly; the business has to radically change and now is the time to do it. There are many thrilling opportunities for proactive and creative magazine publishers and the future depends entirely on how publishers adopt and evolve. But the question is how magazines will change their ways in a digital world while remaining and developing their true identity.

This is the background and the context in which the ORVESTO QRS 2013 was conducted and published.

The paper will cover three general areas which are of importance to the magazine industry:

1) State of the nation. What is the current state of the readers' perception of their relationship with magazines?
2) What's new? The original ORVESTO QRS was made in 2006 and since approximately 70 % of the 2013 survey was a replication of the original survey comparisons can now be made on how time and the digital age has changed the overall Key Performance Indicators of magazines.
3) Digital reading. Comparing magazines with high levels of digital reading with the ones with low digital reading, deductions can be made on how this affects general Key performance Indicators and perceptions of the brand.

But before examining the data let us look into how the ORVESTO QRS was made.

2. The mechanics behind ORVESTO QRS

ORVESTO QRS was made in a four step procedure which was identical to the procedure 2006. Since magazines quite often have rather low readership levels there are no shortcuts to reach the readers – we needed to conduct a large sample survey.

2A. Establishment survey

In order to find readers of the 240 magazines an establishment survey was launched in TNS Sifo's randomly recruited online access panel. The questionnaire for the establishment commenced with a screening question on a magazine category level. Furthermore the survey contained questions on frequency of magazine readership on individual titles. This resulted in a response from little just 22 800 respondents.

2B. ORVESTO QRS survey

The respondents that were identified in the establishment survey were then re-interviewed regarding the detailed quality of reading (ORVESTO QRS) information. This was, as the establishment, done through a CAWI survey.

For reasons of respondent fatigue and relevance it was decided to ask the detailed ORVESTO QRS questions for a maximum of 3 titles regardless how many titles the respondent reported as read in the establishment phase. This was done by a complex randomization algorithm which randomly distributed titles while taking size (i.e. overall readership) in to consideration.

In order to provide a detailed ORVESTO QRS profile for all magazines it was decided that a minimum sample of 200 interviews was required for every title. To ensure this sample minimum and the random selection of 3 titles (if more than three titles read) the informant order in the data file was first randomized. Then the readership of informant 1 was examined. The first title to be selected from the list of titles read was the title with the largest overall readership. The second title selected (from those read) was the title with the smallest overall readership. The third title selected was the title closest to the average of the reach of all titles read. The process was repeated for all informants. A count was kept of the number of responses for each title. When a title had reached 200 responses it was removed from the eligible selection list.

Reading was defined as reading at least 1 of 4 issues. That is to say those 'almost none' readers in the standard ORVESTO reading frequency scale were excluded.

Altogether, 50 different dimensions related to magazine reading were evaluated for each title.

2C. The questionnaire

The ORVESTO QRS-questionnaire contains 14 different questions which together covers 50 various dimensions all related to magazine reading. The entire questionnaire was implemented in a CAWI survey, with a respondent friendly interface where each screen contained of one question. The average length of an interview was 15.9 minutes. Please see the attached appendix for the full questionnaire with markers for those additional questions that are new in the ORVESTO QRS 2013 survey.

2D. Data integration into NRS

One of the central aspects of the 2013 survey was a complete data integration of the ORVESTO QRS survey into the NRS since this is the key to complete transparency in the market. The integration was done by data fusion modelling and was conducted by Bucknull & Masson International Media Marketing & Research.

The data fusion modelling is obviously a quite complex process and is not covered in detail in this paper. But it is absolutely central in our approach. Since data is transferred between the two datasets on an individual basis and not on an aggregated level (as would any ordinary prediction model do e.g. regression- or discriminant analysis) the frequency distributions of all variables are more or less kept intact. The frequency of reading questions were even transferred and harmonized to exact levels.

The ORVESTO QRS data is hence transferred into the 'ordinary' NRS dataset and all the data can be reported based on AIR levels. Consequently the population for each magazine corresponds to its net reach and the ORVESTO QRS data is applied to each magazines population.

The benefits of an integrated dataset are extensive and concrete. A few of the major benefits are:

- A framework or starting point where all magazines can be compared from a common perspective is created. Any bias or skewed distributions due to the ORVESTO QRS survey set is 'eliminated'.
- ORVESTO QRS data can easily be interpreted and applied to known and accepted market definitions; they do not have to be 'translated' to fit into existing perspectives or analysis.
- There is a broad acceptance for the NRS and its AIR levels / definitions among magazine publishers, media planners and advertisers. This facilitates the acceptance and use of ORVESTO QRS.

- The ORVESTO QRS data can be integrated into existing infrastructure and routines, e.g. the SESAME media planning software with multi media planning possibilities. In other words bringing in ORVESTO QRS data into a multi media planning environment.

- Another huge benefit is the ability to further analyse the ORVESTO QRS data in different target groups in a seamless dataset and analysis tool.

2E. Reporting

Through the fusion into the NRS a fully integrated ORVESTO QRS database was launched in the media planning software SESAME. This makes it possible for not only the magazines but also the media agencies to create media plans based on both ORVESTO QRS and NRS-data.

In addition to this, a facility which takes number of pick-ups and amount read into account has been built in the media planning software. This will enable magazines to fully reap the benefits of their repeat exposures. It will obviously never affect the net reach but gross reach will be affected. As of today this has yet to be released to clients since discussions on the need to include this data in all NRS data waves is undergoing. Thus discussions on a continuous fusion of ORVESTO QRS data to new data bases are on the agenda.

Furthermore, 240 unique reports were distributed consisting of in total 13 920 individual Power Point pages. Since our intention of the study was to create a transparent tool for the entire magazine industry each magazine has the possibility to evaluate not only their own result but also benchmark this with the competitors. Our experience from the previous survey in 2006 also taught us that in order for this material to be used by all the different units at a magazine (i.e. advertising sales, marketing, editorial etc.) we needed to incorporate not only the results as facts and figures but also a more profound and in-depth line of thoughts and reasoning about the magazine market as a whole. Accordingly, the report for ORVESTO QRS 2013 is quite extensive and consists of several diverse parts:

- Through data integration into NRS the results from the ORVESTO QRS can be analyzed in the **media planning software SESAME** with multi media planning possibilities (as described above).

- **Individual Power Point reports** for each specific magazine have been compiled. The reports are designed in such detail that they can easily be used exclusively for a profound understanding of specific results for a title compared with the magazine industry as a whole. The result in each report is presented with a combination of graphs complemented by analytical texts discussing the results and the importance of each topic for individual magazines.

- A **report summary** was designed to provide an overview of the entire magazine industry. Here the focus was on highlighting the magazines that had been the most successful in various fields.

- A **statistical analysis** (i.e. a hierarchical cluster technique) was made on the basis of 38 attitudinal statements. As a result, we were able to distinguish five different clusters or dimensions, all of which can be summarized as driving forces for magazine reading. Every magazine was also ranked according to their ability to fulfil the characteristics of that particular dimension and can be used as a benchmark for editorial development.

- A unique **brand position** for each magazine was also added to the report. This was enabled by adding a brand positioning model (i.e. **Needscope**) to the survey.
- Since we also wanted to spread knowledge and information about the ORVESTO QRS survey to those who either was curious to learn more or to those who still did not know much about the project, a **seminar** series of three very well attended occasions was carried out.

- In order to get as many recipients as possible to use the material the data together with our analyses was also presented in more easily digested formats such as individual magazine **word clouds**. This way the individual magazines unique "DNA" could be seen in a quite startling way – additionally these clouds also made a rather stunning framed picture at the editor in chief's wall of fame.

3. The state of the magazine nation and changes in magazine reading since 2006

2006 might in many aspects feels like only yesterday but it is important to remember that the media world has changed monumentally. In 2006 Smartphones, Ipads, Netflix as a streaming service or Facebook did not exist. In the new world magazines are striving to find their new identity and it became obvious to us that we had to include digital reading of magazines. But since we also conduct the Swedish Internet audience Measurement we knew that generally speaking digital reading of magazines are lower than what is generally expected and to us as researchers this posed a problem. If we would need to make 40 000 interviews to cover printed magazine readers that amount of interviews would need to be at least 10 folded if we were to evaluate the digital versions of the magazines. Hence a decision was made and the survey was limited to ask respondents if they also read the magazine digitally and if so on which device/platform.

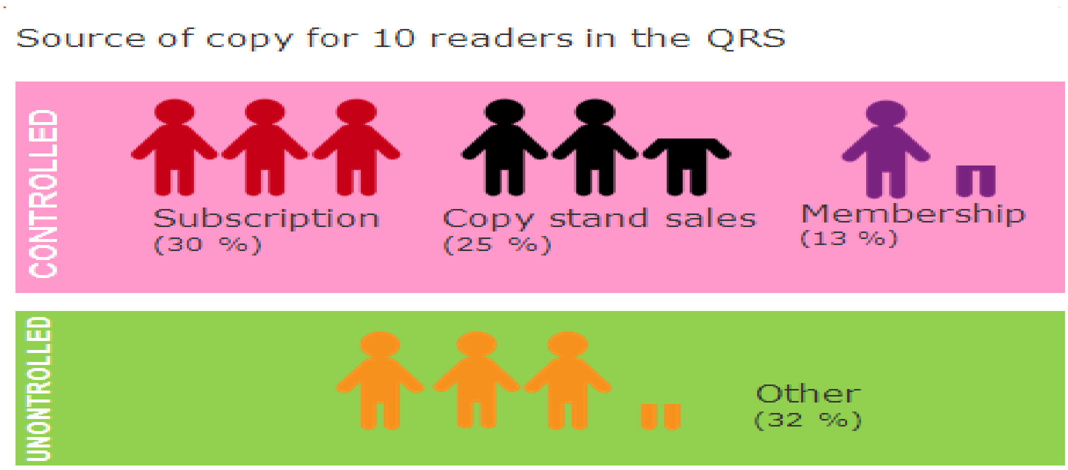
Let us move into the results of the ORVESTO QRS 2013.

3A. My home is my castle

When we started looking at distribution (source of copy) of magazines it became clear that to magazines "my home is my castle" is a claim that still holds relevance, now more than ever. As an aggregated number we saw that subscriptions dominated the controlled part of source of copy.

But also quite amazingly as much as 32 % (see chart) of the magazine readers come from areas out of control of the publisher. This is absolutely worth to consider when we try to analyse and predict RPC values. It is also obviously so that when newsstand sales diminish the importance of creating stable subscription businesses cannot be overstated. And obviously the pressure to develop alternative revenue streams increases even further.

In short – The ORVESTO QRS tells us that publishers are not in control of the distribution of magazines to readers. Readers find their own ways to get hold of their desired magazine.



We saw decreases of reading in all "places of reading" except for reading at home. As much as 77 % read their magazine at home. That is a 13 % increase from 2006. Magazines are moving home.

In many contexts it has been suggested that the composition of the circulation of a magazine reflects an overall quality of reading i.e. that magazines with a high proportion of personal subscriptions and "home reading" would be read more carefully, with a greater commitment and on more occasions.

The 2013 survey indicates that more complex structures interact to create high quality of reading than can be explained by place of reading alone.

As illustrated in the table below the three main quality indexes are highest among magazines with a moderate proportion of "home readers". Contrary to what the aforementioned hypothesis suggests all three averages are significantly lower among magazines with a high proportion of "home readers".

	Proportion of readers reading at home			
	Low	Medium	High	Total
Avg. reading time (minutes)	33,2	34,6	28,9	32,3
Avg. % amount of reading	71,9	76,8	75,7	74,8
Avg. number of pic ups	2,1	2,6	2,2	2,3

We do not know why this is the case but when reviewing the list of magazines in each group we can conclude that there are a number of “non requested” titles, such as customer-, membership- and trade union magazines in the group of magazines with the highest proportion of “home readers”.

But many of the tabloid supplements are classified to this group of magazines as well (most of them non free supplements, i.e. they are paid for). To conclude, place of reading alone do not reflect prerequisites for quality of reading.

When we group the magazines by proportion of subscribers (i.e. proportion of readers claiming to read a subscribed copy) we do on the other hand find the expected pattern. Average amount of reading and number of reading occasions increase by increasing proportion of subscribers even though reading time is highest among titles with moderate proportion of subscribers. And the magazines most often subscribed are having a higher number of pick-ups.

	Proportion of subscribers			
	Low	Medium	High	Total
Avg. reading time (minutes)	30,6	34,9	31,2	32,3
Avg. % amount of reading	72,5	74,0	77,5	74,8
Avg. number of pic ups	2,0	2,3	2,5	2,3

We conclude that it is the nature of the distribution rather than place of reading that indicates the strength of the relationship to a magazine.

Magazines are nowadays also to a larger extent being read at home. So it seems as magazines role as a home invader has been further consolidated and the bubble bath magazine reading moment has gained strength further.

When comparing to 2006 we see that the uncontrolled part of the distribution has decreased from 35 % to 32 % of the total. So a positive side effect of the development is that the publisher’s control of the distribution has increased slightly.

We also see that the share of newsstand sales has went down by 7 % and that the relative share of subscriptions went up by as much as 20 %.

This is quite an important transformation of both the business model and the distributional aspects of magazines.

3B. The fundamental KPI:s of Magazine reading

What we call the fundamental KPI: s is the core values and also the most commonly researched ones:

- **Time spent reading** – Compared to 2006 this is interestingly enough the only reading fundamental which has moved in a positive direction from 40 to 42 minutes.

As in all other areas we see huge variations between different magazines. In this case the average reading time in magazines are ranging from 13 to 124 minutes. This actually makes it hard to talk about averages in such a diverse industry as the magazine industry.

- **Amount of pages read** - is now 74,5 % to be compared with 79 % in 2006. That is a decrease by almost 6 %. It seems as the digital "smorgasboard effect" is reaching magazines.

Readers choose more carefully what they are reading and the need for publishers to more carefully monitor magazines page traffic and to optimize the flow of the magazine has further increased. It is actually quite interesting to consider and compare the resources spent by television channels to create the optimal tableau and then to compare it to many publisher's "no resource" strategy when it comes to optimize the flow of reading in the magazine.

- **Number of pick-ups** - the average number of pick-ups is now 2,3 and that is quite a hefty decrease. In 2006 it was 2, 9. That is more than a 20 % decrease.

Magazines are still being read and re-read but the need for instant satisfaction seems to have reached the magazine world. But still 49 % of the readers read their magazine more than once (even though that is also a decrease from 65 % in 2006). The variation between titles varies from 11 % to 81 %.

Concluding the change from 2006 is seems fair to say that the faster pace of life, the information competition and the digital revolution amongst other things have clearly changed the way we consume magazines. Analysing the fundamentals we see that:

- We read less in the magazine
- We read fewer times
- We more often read a subscribed copy
- We more often read at home
- We read for a longer time

It seems as the defining "magazine moment" has become even clearer over the last years of digital development.

3C. Magazine love – Is the love still out there?

We often talk about the strong relationship between the reader and his/hers magazine but the question is whether the love is still there.

Answering the question whether they would or would not miss their magazine if it ceased to exist - as much as 46 % claimed that they would miss it. This is an increase from 43 % in 2006. This is in many ways what we would call a double edged sword because really how many would miss their particular brand of tooth paste if it ceased to exist. 46%? - not likely.

So there still seems to exist a strong bond between readers and magazine brands but it is important to remember that it also means that as much as 54 % of magazine readers feel that the bond is not so strong so that it would matter a lot to them if they would not be able to read the magazine again. This is obviously a function of both perceived quality, competition with other magazine brands that could replace the magazine, sense of uniqueness etc.

When we studied the overall grading scale we saw that the average was unchanged since 2006. **The average score is still 6,7** out of 10. Indicating the obvious that we generally speaking do not continue reading what we do not like. It is also remarkable that out of the ten titles that got the highest grades as many as 4 of them were also on the top list in 2006. A focus on quality and strong brand building seem to pay off.

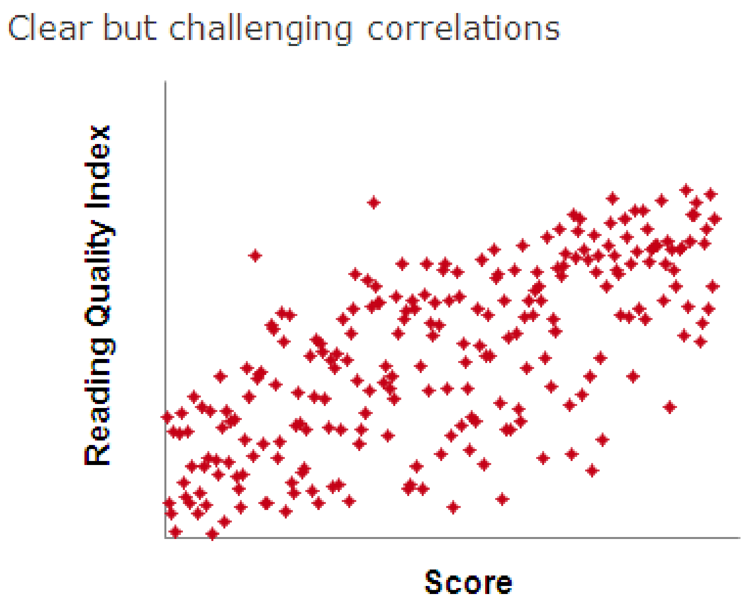
This also proves to be correct when we analyse the development of the audiences of the "most appreciated magazines". They have a positive reach figure development of 29% (comparing from 2009 to cover as many of the top magazines as possible) while the average magazine in the NRS has a – 17% decrease.

However life is never that easy and media research certainly is not. A reading quality Index was created by combining time spent reading, number of pick-ups and amount read and when we studied the correlation between the reading quality index and the average score we could draw two conclusions.

Firstly, there is a clear correlation between giving a magazine a high score and how thoroughly you will read it.

Secondly, the first claim is not absolutely correct on an individual magazine level since it can absolutely be the case where magazines that have a high score score low on the quality of reading index (It might be a matter of the function of the magazine - it is simply not built to be read many times, for a long time etc.) but on the other hand you have titles that might have high quality of reading score but who get low scores since the readers don't have any alternative to this magazine.

Once again - Magazines are different but to fully understand this, deep analysis of them and their environment is a must.

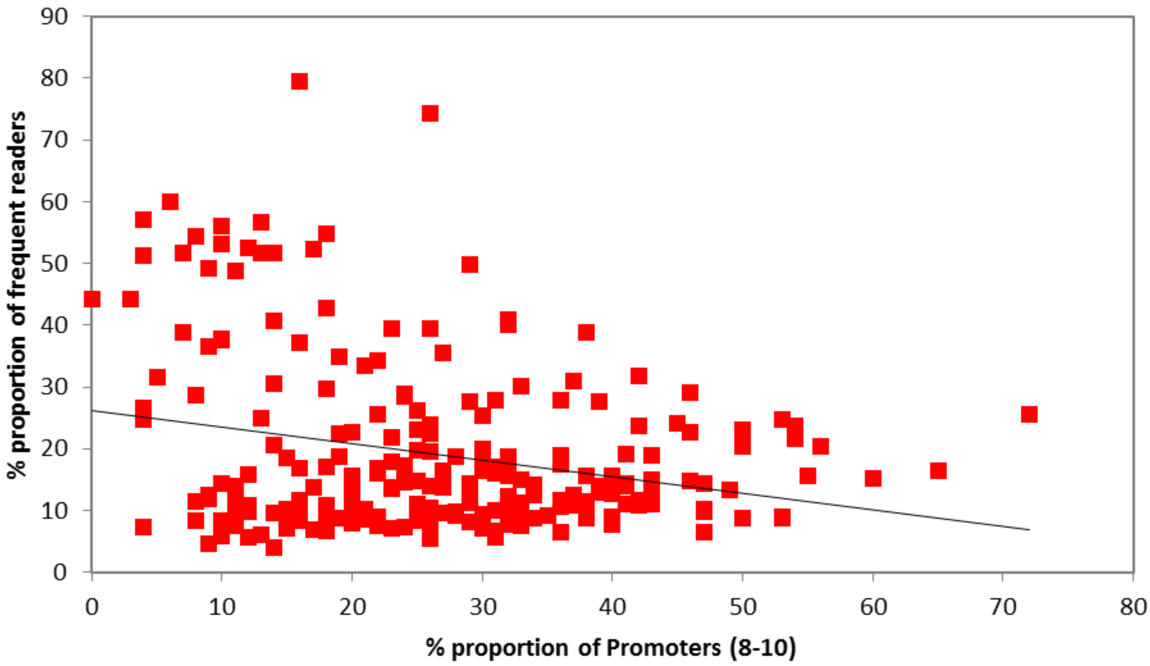


A **net promoter score** was also created to understand the level and the force of readers recommending their magazine to friends and/or peers. It might be obvious to some but the initial low levels of Net Promoter Score caught us with some surprise. When we compared NPS between ever readers and average issue readers we saw significant differences.

The unexpected levels of the NPS led us to abolish the use of the NPS score in the report. And we just concluded that as much as 26 % would recommend their magazine.

At a first thought it may sound really alarming. Is the average quality of Swedish magazines really so bad that most readers don't even want to recommend them to others? Or does lack of willingness to recommend a magazine reflect other underlying fundamentals?

Conventional wisdom told us that we would find a good correlation between frequency of reading and willingness to recommend the magazine. And to better understand what we were facing we plotted the Promoter scores of every magazine (8-10 on a scale from 0 to 10) against the proportions of regular readers (3 out of 4 numbers or more) from the corresponding NRS data.



Unexpectedly - the plot revealed a negative correlation (0.25), expressed in a contingency table the differences were:

	Proportion of Promoters (8-10 would recommend)			
	Low	Medium	High	Total
Avg. % proportion regular readers (3 out of 4 no.)	23,8	17,1	16	19,2

So challenging conventional wisdom it seems as magazines with more infrequent readers also will have a higher proportion of promoters.

We haven't yet been able to further examine the reasons for this unexpected pattern. A hypothesis to start with suggest reading a magazine often is a very personal experience concerning my personal interests, my lifestyle, my food, the travel of my dream, my family and career. My fishing gears. My iPad or my BMW.

Consequently many readers would rather tend to view their choice of magazine as something that just concerns them (personal reasons) or even as expression for their personality and life style (exclusiveness). In some cases readers of a certain magazine would simply feel that no one in their family or among their friends would be interested or initiated enough to appreciate whatever subjects covered in 'their' magazine (special interests).

So the question when using NPS on the basis of readers is: Is a reader a customer? To some degree they most certainly are, but we have to remember the high levels of the distribution which are out of control of publishers.

We will dig further into this question, but for now we can conclude NPS can be a 'shaky' KPI for magazines and maybe it's wise to limit the interpretation of it if it's used in the organisation.

In order to find out **"what distinguishes the overall most loved magazines from the ones that do not receive the same appreciation"** further analysis were made.

The twelve titles with the highest total grades were in this analysis compared to the rest of the 200+ titles in order to understand what the most important factors behind appreciation are.

Let us start by describing what a high scoring magazine most often is not:

It is not likely that a top scoring magazine will be delivered through any form of membership or has its majority of the reading taken place at other places than at home. It is also unlikely that a top scoring magazine is bought by another person in the household. It seems as it primarily comes down to the magazines role as a chosen partner vs. acting as a temporary lover (especially if that partner is chosen by someone else).

There seem to be no correlation between the most appreciated titles and their reader's appreciation of advertising in the title. Advertising is not driving appreciation generally speaking.

There is a small overrepresentation amongst the top magazines to also be read digitally. But it seems to be quite a weak correlation between the top titles and the reading of a digital edition. Titles with more digital reading are generally speaking not more appreciated.

It is not surprising to see that the reading fundamentals (amount read, time spent reading, number of pick-ups) are a great indicator of appreciation.

It is most common that a top scorer will be a subscribed copy even though data also indicates that magazines given to the reader by a friend also are overrepresented amongst top scorers. And thinking about it - it actually seems logic. A friend is someone who knows who you are and a recommendation from a friend who knows your interests will more likely mean a perfect match between reader and magazine.

Reading at home and being read while commuting are also strong indicators of success. And once again – a reader who goes through the process of bringing a magazine along while commuting is more likely a real brand fan.

A magazine's ability to work as an ignitor of fiery discussions is also something only successful magazines manage to do. And people who save their magazine do so for a very specific reason. They don't want to part from an old or new found lover.

The chart below showing the index differences between the 12 most appreciated titles and the rest of the 200 + titles could be seen as a list of ingredients that most often are appreciated by a reader (and not appreciated by all means) and it is up to the editor in chief to make the perfect mix according to the titles target group and function.

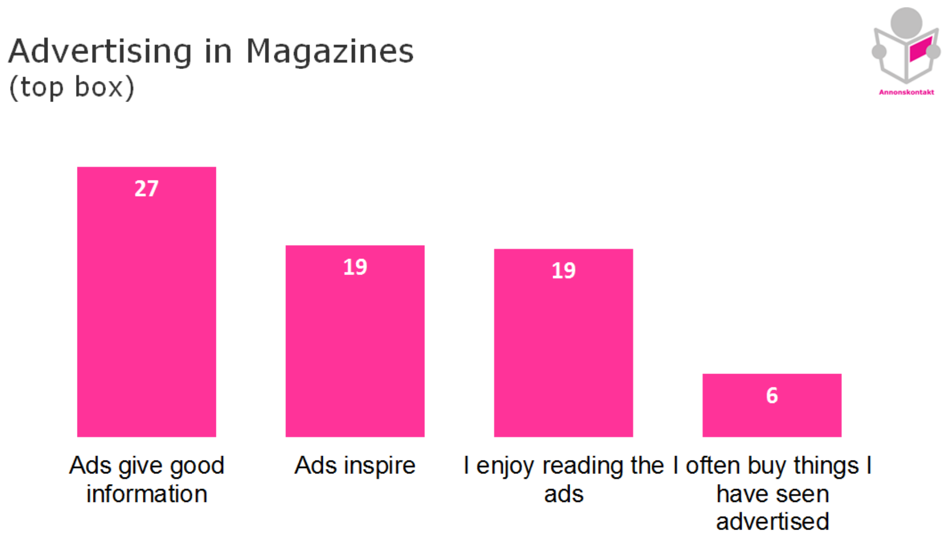
So it seems as the love is still out there but that obviously some are more loved than others.

	Top Magazine Index
[MAGAZINE] often surprises	260
Time spent reading	217
[MAGAZINE] is unique in its kind	216
I often talk about things I have read about or seen in [MAGAZINE]	214
Read while commuting	211
It is exciting to read [MAGAZINE]	209
[MAGAZINE] provides revealing articles	204
[MAGAZINE] contains in-depth articles	202
[MAGAZINE] develops me	202
[MAGAZINE] is educating/increases public knowledge	201
[MAGAZINE] affects my way of looking at things	190
I feel connected with others who read [MAGAZINE]	187
It is stimulating to read [MAGAZINE]	180
[MAGAZINE] contains good analysis	180
[MAGAZINE] makes me feel satisfied	177
I read [MAGAZINE], save it and return to it	176
[MAGAZINE] contains much to read	173
Subscribe in household	170
Quantitative Reading Index	168
Would miss if no longer published	167
I often learn new things by reading [MAGAZINE]	167
[MAGAZINE] is modern and with the times	165
Want to visit magazine event	165
[MAGAZINE] helps me to relax	163
[MAGAZINE] writes about many different subjects	160
I look forward to reading [MAGAZINE]	154
I often discuss / comment on the Internet about things I have read about or seen in [MAGAZINE]	153
[MAGAZINE] is well written	153
[MAGAZINE] gives me entertainment	152
[MAGAZINE] is trend-setting	152
[MAGAZINE] is inspired	152
[MAGAZINE] is a magazine with good reputation	147
I read [MAGAZINE] when I have time for myself	146
Somewhere else	143
[MAGAZINE] is credible, we can trust what it writes	143
Things I read in [MAGAZINE] often makes me to go to the Internet and find more information	137
[MAGAZINE] gives me new information	133
[MAGAZINE] is current / and reflects the latest	129
Got magazine of friend	128
At friends/relatives	127
Number of pick ups	123
Amount read	110
At home	108
[MAGAZINE] gives me new ideas / advice	106
Digital Reading	104

Read at work	99
[MAGAZINE] allowes me to try new things I have read about	99
Bought single copy	92
The ads in [MAGAZINE] often gives me good information about things I'm interested in	91
Ads in [MAGAZINE] often inspires me	88
I enjoy reading the ads in [MAGAZINE]	84
Other place	81
I often buy things that I've seen advertised in [MAGAZINE]	78
[MAGAZINE] is glamorous	78
Single copy bought by someone else in household	69
Outside of home	58
Membership	10

3D. Advertising – Still a special relationship

The lack of advertising avoidance and the strong bond between reader, magazine and the advertising has historically been perceived as a huge advantage for magazines by the advertising market.

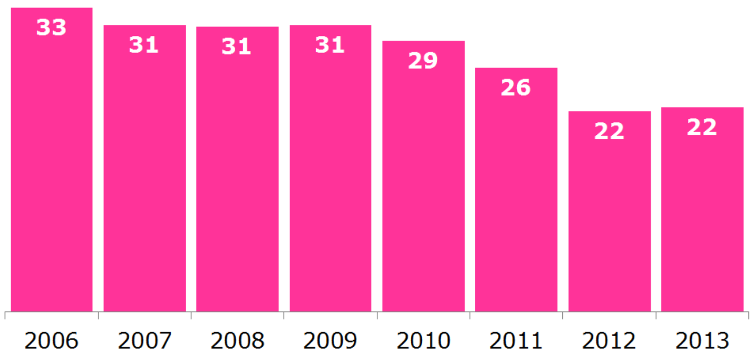


When we first studied the new data, the levels on the advertising related variables raised some concern and the data were actually recalculated and reviewed to make sure they were correct.

Even though the questions have been changed slightly which means that direct comparisons with 2006 are impossible it still seems obvious that the cold wind of advertising avoidance at last has reached magazines. If we simplify it we can say that it is clear beyond any doubt that there has been a significant decrease in ad. enjoyment.

When the data was double checked with data from the NRS the new data from the ORVESTO QRS was also more or less exactly corresponding with the decreases of ad enjoyment as measured in the NRS.

Attitude towards advertising in Magazines (NRS)
(top box – rather/very positive)



Looking at perceived ad-enjoyment as the top box number of people saying they are rather or very positive towards advertising in different media it is obvious that overall positiveness towards advertising is falling. The average advertising positiveness decrease is 23 % from 2006 to 2013.

The lean forward media such as print in it’s different forms are still faring relatively well compared to the lean backward media such as TV, radio and Internet (which by all means is both lean forward and lean backward). It is however interesting to see that it is the lean backward media whom are relatively seen gaining market shares on advertising positiveness. As a fact Internet is actually the only media having a positive advertising attitude development since 2006.

Analyzing the advertising related data further an analysis was made to evaluate the advertising data in the context of distribution and place of reading. The 2013 study suggests there are some differences even though marginal as shown in the table below.

	High proportion subscribers		Low proportion subscribers	
Means top box (4+5)	**Low "reading home"**	**High "reading home"**	**Low "reading home"**	**High "reading home"**
Advertisements in the magazine gives good information	26,7	27,5	26,8	26,7
Advertisements in the magazine inspires me	18,9	19,9	18,8	19,2
I like reading the advertisements	19,1	19,6	18,3	17,7
I often shop products I have seen in the magazine	6,6	6,0	6,6	6,1
I often talk about things I have seen or read about in the	21,8	20,1	20,3	19,7
I often discuss/comments on Internet about things I have seen or read about in the magazine	6,5	5,3	5,6	5,9
Things I read in the magazine often make me search for further info. on Internet	16,3	14,8	14,7	16,1
I read and keep the magazine in order to pick it up later	30,3	31,0	30,5	28,3

Fact is that we found larger differences in attitudes towards advertisements between different types of magazines (i.e. fashion, travel, economics, food etc.) than could be attributed to type of distribution.

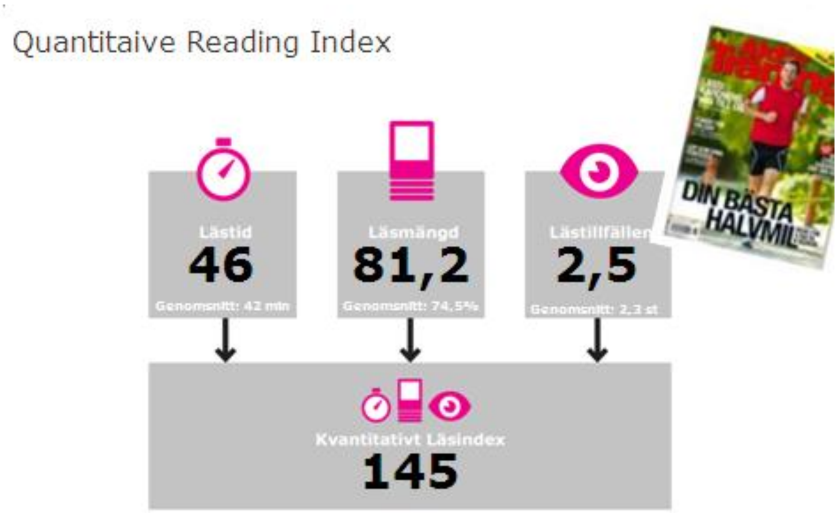
An analysis of the reader profiles of a number of the magazines indicates the attitudinal differences between the titles could rather be explained by differences in an overall attitude towards advertising and commercials among the readers of the magazines respectively. Not by the composition of the distribution itself.

In an era of intensified competition for audiences time, brains and hearts the quality of different media exposures has been subject for many and vivid discussions. A development where a larger share of the magazine exposures take place at home and in subscribed vehicles seems to work in favor of magazine advertising, rendering higher APX and number of exposures. But as far as we can understand based on this study higher committed readers and reading does not necessarily lead to a better advertising environment.

Apart from the gloom concerning the lower levels of advertising enjoyment there were as expected very interesting differences when we analysed the advertising in magazines along the dimensions informative, inspiring, general liking and propensity to buy.

Different magazines scored very different along the different dimensions and the functionality of the magazine seemed to explain their success along the dimensions.

As mentioned earlier a Reading Quality Index was created by combining time spent reading, amount read and number of pick-ups. The relationship between these and their usability to advertisers can and has been discussed heavily. It is however hard to claim that a magazine with a long reading time, large amount read and high number of pick-ups will not increase the opportunity for advertising opportunities. Hence all magazines have got an individual Reading Quality Index (see chart below) to guide planners further beyond the normal KPI used in buying and selling of advertising space.



Comparing the advertising related variables with data from 2006 we have to conclude that we see rather steep decreases on all measured dimensions. It is however interesting to see that the decrease were the highest for "advertising perceived as informative" followed by "general liking of ads in the magazine" while the dimension which by far suffered the least where "advertising in the magazine perceived as inspirational".

It is tempting to consider that this is very much in line with the findings concerning "the home invaders" and that magazines function as an informative source is diminishing while they still hold the fort when it comes to provide inspiration.

But if this change is a consequence of the digital development, it is interesting to consider what the digital development when it comes to “photos as the new black”(as seen in the fast development on Instagram and Pinterest) will do to magazines as a provider of inspiration.

3E. Buzz – The hidden effect of magazines

In the next step the magazines ability to create buzz/talk was examined since magazines are often considered good starting points for brand conversations.

Both digital and analogue discussions were covered in the questionnaire.

- 20 % claimed to often talk with other about things they had read in the magazine
- 6 % claimed to often discuss/comment things they had read in the magazine

But magazines can also be a starting point for further exploration on the internet.

- 15 % claim to often visit the internet for further information on something they had read in the magazine

But the world is as we know also filled with old magazines – saved for further exploration and inspiration.

- 30 % claim to save the magazine for further reference after reading it

Comparing the data with 2006 we generally speaking see that all comparable dimensions have decreased and it seems as the magazines role as creator of analogue and digital discussions has diminished in the digital era.

It feels as it is a sign of the times that each individual media category will provide a smaller piece of the total multimedia jigsaw than before.

- In 2013 20 % claimed to often talk with other about things they had read in the magazine – the corresponding figure for 2006 was 39,6 % . So magazines role as an ignitor of conversations has more or less halved in 7 years*.

- In 2013 15 % claim to often visit the internet for further information on something they had read in the magazine – the corresponding figure for 2006 was 31,9 %. In 2013 the magazine in itself seem to be more of an end destination than it was in 2006 where it was more of a starting point of a explorative journey*.

- In 2013 30 % claim to save the magazine for further reference after reading it – the corresponding figure for 2006 was 41, 8 %. The decrease here is significant but not on the same landslide dimension as the earlier ones. There is still a need for physical products in the digital age*.

**) The exact wording in these questions are very similar in the two surveys (2006, 2013) however they are not exactly the same, which should be mentioned and taken into consideration.*

3F. Events – Other ways to deliver value to readers

Publishers are as we all know desperately trying to find new revenue streams and events have to some publishers turned out to be a significant value builder both from a monetary and a brand building perspective.

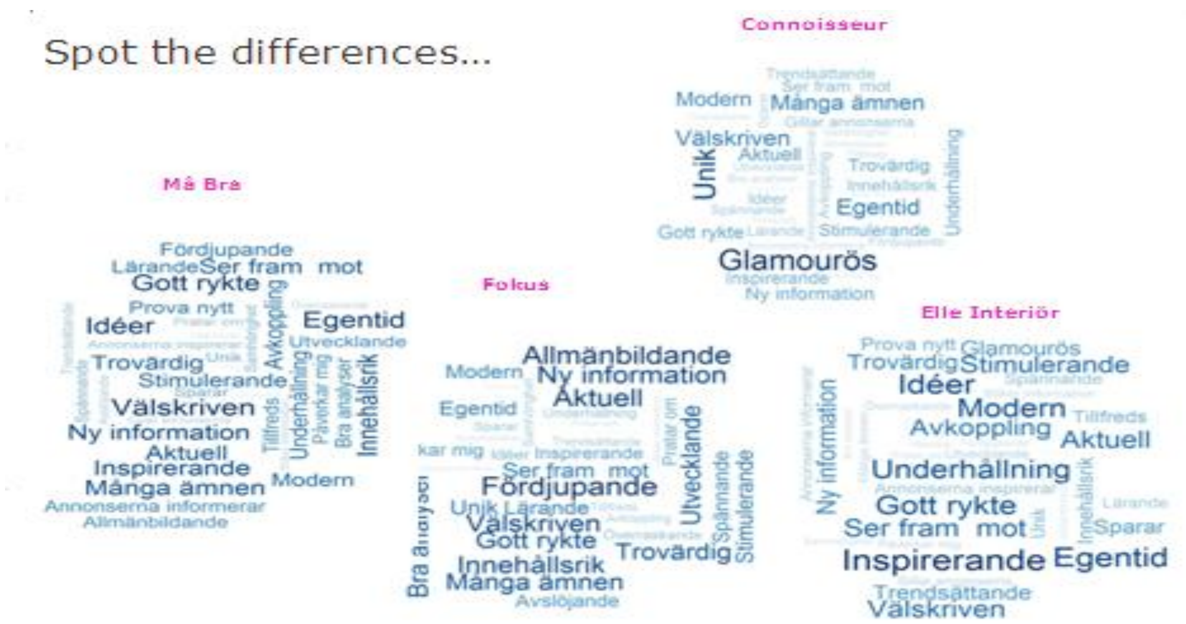
18% of readers claimed to be interested of visiting an event held by their magazine. There were huge variations amongst the different magazines (max value **51%).**

More enthusiasm where shown for the event held by the whisky magazine and less so for “less” stimulating subjects. But all in all 18 % has to be seen as a very high number and a great opportunity to publishers. No comparison was possible with 2006.

3G. Diversity in attitudes to magazines

Magazines are enormously different and this actually at times makes it hard to talk about an average magazine. But at the same time the differences between magazines is a fantastic starting point for advertisers since magazines offers many good and different arenas for effective communication. In the ORVESTO QRS 38 different attitude statements were collected and it is amazing to examine the tremendous spread between magazines.

Every magazine got their unique word cloud showing the most descriptive statements – we could call it their unique DNA. The most important point though is that the word clouds highlighted the amazing diversity amongst the magazines.



In the following chart are the minimum, maximum and average results from the attitude statements in the survey. The minimum and maximum values tell us a clear story about magazines ability to just be enormously diverse and different from each other. The maximum values also tells exactly how appreciated a magazine can be when the functionality of the magazine and the target group works in perfect unison.

	Min	Max	Mean
1: I look forward to reading [MAGAZINE]	8,9	87,8	49,0
2: [MAGAZINE] is unique in its kind	5,7	81,1	34,4
3: I feel connected with others who read [MAGAZINE]	2,2	63,8	26,2
4: The ads in [MAGAZINE] often gives me good information about things I'm interested in	1,2	59,9	27,2
5: Ads in [MAGAZINE] often inspires me	0,6	90	19,7
6: I enjoy reading the ads in [MAGAZINE]	1,1	53,4	18,9
7: I often buy things that I've seen advertised in [MAGAZINE]	0,2	30,6	6,5
8: I often talk about things I have read about or seen in [MAGAZINE]	1,5	70,6	20,4
9: I often discuss / comment on the Internet about things I have read about or seen in [MAGAZINE]	0,2	24,8	5,9
10: Things I read in [MAGAZINE] often makes me to go to the Internet and find more information	0,7	51,1	15,5
11: I read [MAGAZINE], save it and return to it	2	70,4	30,3
12: [MAGAZINE] gives me entertainment	4,6	89,5	47,6
13: [MAGAZINE] makes me feel satisfied	2,5	68,5	30,0
14: [MAGAZINE] is inspired	5,2	80,8	42,9
15: [MAGAZINE] helps me to relax	1,4	80,7	38,3
16: I read [MAGAZINE] when I have time for myself	11	83,2	50,0
17: It is stimulating to read [MAGAZINE]	4,8	91,6	40,8
18: It is exciting to read [MAGAZINE]	1,9	85	30,9
19: [MAGAZINE] gives me new information	2,2	91,6	53,5
20: [MAGAZINE] gives me new ideas / advice	0,6	79	44,1
21: [MAGAZINE] allowes me to try new things I have read about	1,8	76,1	27,1
22: I often learn new things by reading [MAGAZINE]	0,8	84,1	36,0
23: [MAGAZINE] affects my way of looking at things	0,7	60,2	23,6
24: [MAGAZINE] develops me	1,7	82	31,7
25: [MAGAZINE] is credible, we can trust what it writes	4,2	85,8	50,8
26: [MAGAZINE] is a magazine with good reputation	6,3	93,9	52,1
27: [MAGAZINE] is well written	9,1	92,4	54,0
28: [MAGAZINE] writes about many different subjects	8,2	95,6	40,9
29: [MAGAZINE] is current / and reflects the latest	3,3	84,2	48,0
30: [MAGAZINE] is trendsetting	1,4	63	19,5
31: [MAGAZINE] often surprises	0,9	69	18,4
32: [MAGAZINE] is modern and with the times	3,2	88,4	38,1
33: [MAGAZINE] contains good analysis	2,5	83,2	35,4
34: [MAGAZINE] is educating/increases public knowledge	1,9	93	34,5
35: [MAGAZINE] is glamorous	0,1	70,4	13,1
36: [MAGAZINE] contains much to read	10,9	95,4	48,3
37: [MAGAZINE] contains in-depth articles	1	96,8	38,9
38: [MAGAZINE] provides revealing articles	1	72,9	21,0

Another aspect of this diversity is that there are in general multiple aspects of every single dimension, i.e. there are multiple ways for a magazine to develop its content and profile. There is no single, predestined, true path to how e.g. a food magazine should be compiled. When we, as an example, review the magazines that scores high on the "Good analysis" statement it is obvious that good analysis can concern everything from stockbroking to raw food, football and healing. The conclusion is that the editorial (and commercial) toolbox may offer more opportunities and tools than a first thought on the subject suggests.

But even in the abundance of individuality it is still possible to talk about media category characteristics. The ORVESTO QRS 2013 showed the following attitudes to be the five most descriptive for magazines as a category.

In 2013 Magazines are perceived as being:

1. Well written*
2. Gives me new information
3. Has a good reputation
4. Is trustworthy
5. I read it when I have time for myself

* Alternative not in questionnaire 2006

In 2006 Magazines were perceived as being:

1. Gives me new information
2. Educating/increases public knowledge
3. Gives me entertainment
4. Gives me new ideas / advice
5. To give inspiration

On a top level there have been some rather interesting changes. In 2006 the top attitudes were all concerned with the main kind of content a magazine provides its readers with. It was all about bringing forward informative or inspirational values to its readers. In 2013 all these attitudes has suffered severe decreases compared to 2006. As a matter of fact almost all comparable attitude statements averages have decreased heavily. The average decrease on all comparable statements is as much as 28%.

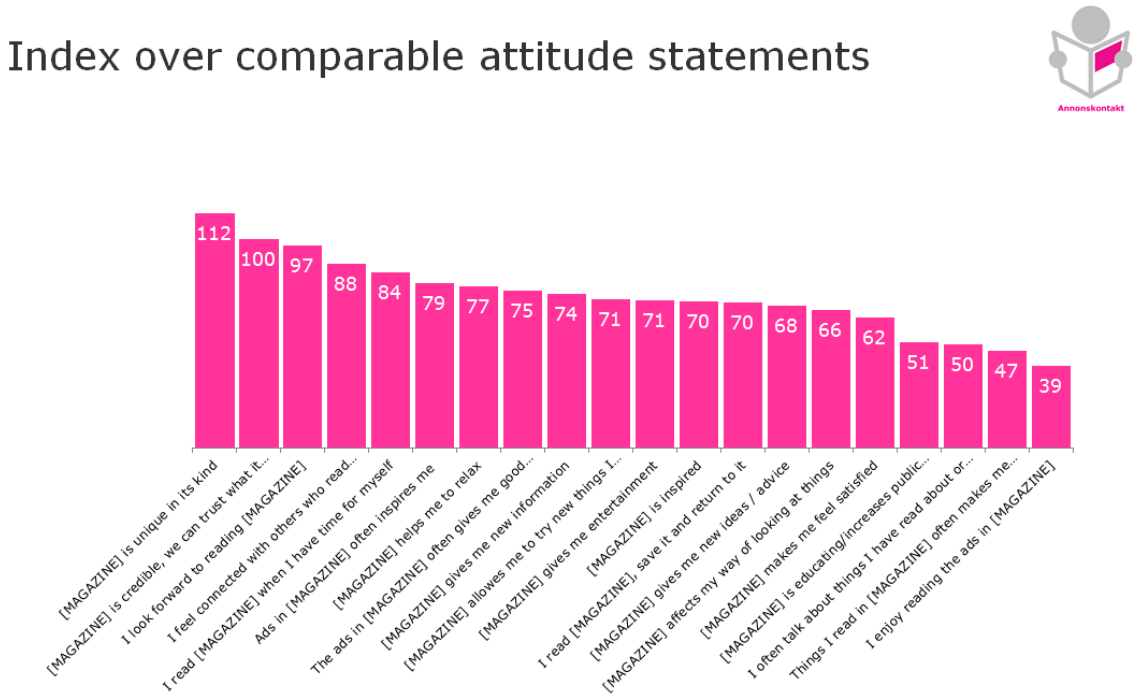
But the top five statements from 2006 have decreased no less than 33%.

In 2013 a magazines ability to provide new information is still one of the most overrepresented attitudes but apart from that there are new contenders to the crown. Interestingly enough these new statements are not concerned with the editorial content a magazine provides but a lot more focused on the “core values” of the magazine brand. We could call it a move towards values which describes a trusted brand. Further this corresponds very well with the overall development where readers consumption of the paper editions tend to be more “genuine” (where quality is central).

When examining the differences from 2006 we can see that the statements concerning informative attitudes as an average decreased by 34 %.

Advertising attitudes on ads as perceived to be informative or inspirational are decreasing on average by 23%
The most important decrease is however as mentioned before the general attitude to advertising in magazines which is down by a remarkable 61%.

The action dimension which involves a magazine's ability to lead to some sort of action after the magazine has been read is also victims of a decrease of 45% on average. This is interesting since it seems as magazines function as a log out tool unfortunately also have negative bearings on their ability to provide further action from the readers.



Inspiration and entertainment attitudes are down with 29%. But most interesting is the fact that it seems as the core "magazine moment" attitudes are the most unchanged ones and with uniqueness as the most obvious example.

In conclusion it seem as magazines in a world of increasing individuality and personalization still are perceived as being unique, trustworthy and provide readers with the very scarce commodity of time logged out from the rest of the world.

From a brand perspective it seems as magazines has lost on the functional dimensions but that they still are strong in the emotional dimensions.

3H. The five dimensions of magazine readership

In order to better understand the underlying dynamics of magazine reading the 2013 survey included 38 attitudinal questions concerning each magazine read.

Even though we found very large individual differences between the magazines a statistical analysis revealed five main dimensions representing the value a specific magazine creates for its readers.

The analysis was made by use of a hierarchical cluster technique. Since every respondent only answered questions about a few of the titles he/she read the analysis had to be made on an aggregated level. In short a unique profile based on the 38 statements was aggregated for each of the 240 magazines, based on these profiles a calculation of multivariate distances was made (Euclidian distances). As a final step the distances was structured with a hierarchical cluster analysis (using Ward's criterion with an agglomerative method for building up the tree structure). Consequently we were able to group the 38 statements in five clusters which were labelled as illustrated bellow:

Action

The **action** dimension describes the different aspects of a magazines ability to create action based on what the readers see or read in the magazine e.g. if you get tips and inspiration from the ads, if you buy things you have seen and read about, if you are talking with others about what you've read or if the reader go onto the internet to search for more information.

Excitement

The **excitement** dimension is basically more about "heart" than "brain", It is about the magazines ability to surprise their readers and create excitement. For many magazines, this is about writing about 'the latest', to be trend setting and modern. Also, glamor and flair can create excitement for many readers. But revealing articles and whether the magazine has a unique approach can also be important for this dimension. Excitement is generated in many different ways for different readers and magazines.

Knowledge

Sometime people read a magazine just to learn something from it, to be stimulated. Aspects related to learning and new **knowledge** are the foundation of the Knowledge dimension. For many magazines the in-depth function is one of the key drivers for their readers. The fact that the magazine contains in-depth articles and provides important analysis is important - as well as being broad and offering new information. Magazines with a high knowledge index are perceived by many readers to be stimulating.

Quality

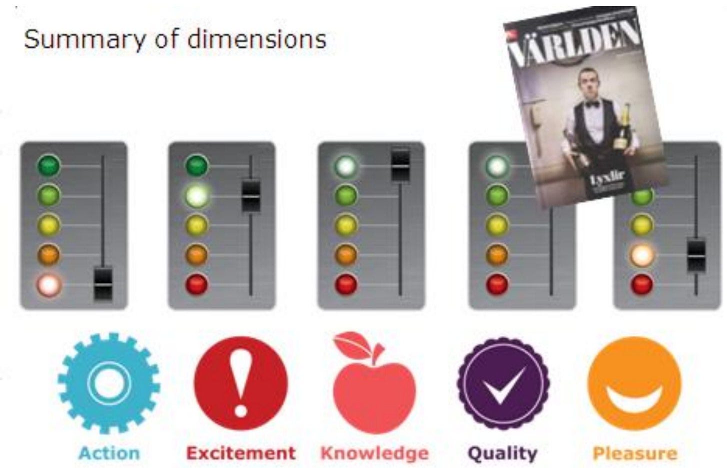
The **quality** dimension is very much about the reading experience - a dimension where the reading experience itself is in focus. Simply good reading, like the feeling of well spent time reading a good book would give. Magazines with high 'quality values' are often perceived as containing a lot of reading material of high quality – often on many different topics. The fact that the magazine is credible, well-written and relevant is key ingredients in this dimension. But also that something unique could be offered to the readers.

Pleasure

For many readers magazine reading is mainly about entertainment and personal **pleasure** which is represented by the fifth dimension. This dimension deals with the pleasure in reading a magazine. Here we find magazines that readers look forward to read when they have some quality time for themselves. Reading as a reward, relaxation and entertainment are all underlying key drivers for the readers. A magazine that inspires and is stimulating also gets high indexes in the pleasure dimension.

These five dimensions could be viewed as a summary of how the different magazines contribute to a genuine reading experience. Our goal with the analysis was not to create an overall rating or index but rather to make the somewhat complex and diverse differences between magazines comparable.

In the next step every magazine was also ranked according to their ability to fulfil the characteristics of that particular dimension. The summary chart could then be used as a benchmark for editorial development.



3I. Magazine brands are efficient business drivers

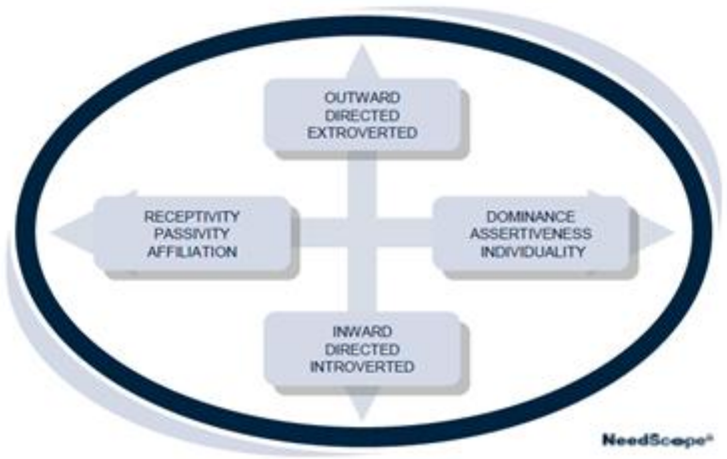
Compared to many other businesses the importance of the brand is (strangely) very seldom accounted for by print executives. Nor by sales representatives, even though it is a commonly known and accepted fact that many magazine brands are very strong and consequently potent business drivers. Given the development on the media market we believe magazines would do themselves a favour by adopting a slightly more brand centric approach. Business strategies based on a client value perspective where many different brands interact will most certainly have a better chance to be successful.

In our effort to create dynamic and truly useful information, a powerful and widely used brand positioning model was added to the survey, TNS NeedScope. This part of the survey had multiple aims to firstly give each of the magazines a brand position and secondly to help advertisers to find suitable environments for their advertisement. By using this well-established model, already and frequently used by many of the big advertisers, transparency was prioritized. We wanted to create a common framework, an arena with 'known rules' and dynamics, for magazines and advertisers to meet at.

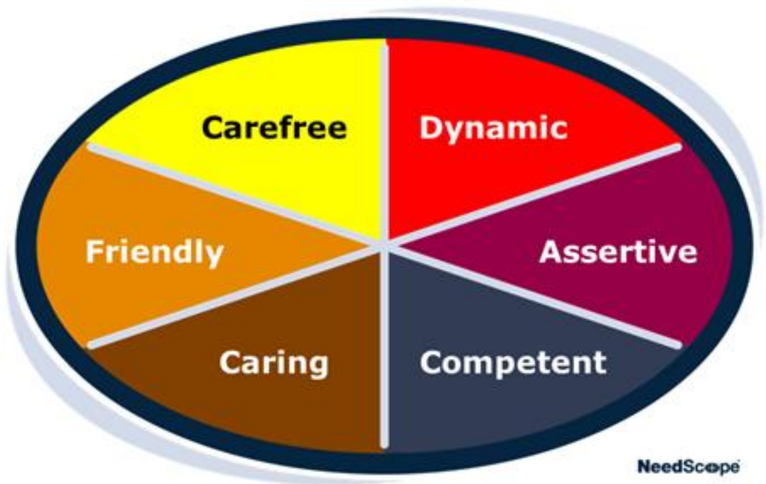
NeedScope is a research system created specifically to help marketers tap the power of emotion and use it to build and grow brands. This is becuase emotion rather than logic is the most influential driver of consumer behaviour.

The framework is based on two dimensions which underlie all human behavior – these unite us as human beings. On the left the horizontal axis is about the need for affiliation and receptivity. The opposite of this on the right hand side is about individuality and assertiveness. So the left is about the need to belong and feel part of things while the right is about the need to stand out.

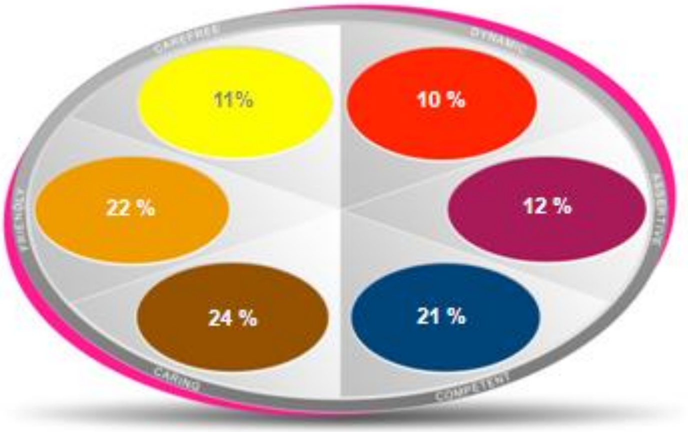
The vertical axis divides the model into an extroverted vs. introverted dimensions. In the marketing context, brands that satisfy more extroverted needs make us feel free and liberated and brands that satisfy more introverted needs make us feel comforted or in control.



Below - the map is overlaid with the NeedScope colors, that each symbolically reflects the different emotions on the model. The 6 NeedScope emotions are expressed as personalities or archetypes – the more extroverted at the top of the model and introverted at the bottom and the affiliated on the left and the individualistic on the right.



Each magazine got their own unique position and each magazine could also access the position given to all other individual magazines. Due to the diversity of magazines the result showed a tremendous spread over the different segments. It was also interesting to see that the magazines in the same segment often had the same kind of graphical design, choice of colours etc.



Moreover, when the total attribution to the segments were analysed it showed a quite hefty overrepresentation in the inward / receptivity dimensions (bottom/left).

It is still open to debate if the reason for that is that the dimensions that are most suitable for printed magazines or/and if it shows that there exists a gap in the market in the upper right corner.

Needscope advertisement test

To further emphasize the purpose of the Needscope brand positioning a separate Needscope advertisement test was carried out outside the ORVESTO QRS framework. Here 70 different magazine ads, in various categories, were examined based on the Needscope model.

This study revealed that the diversity of advertising in a category was the same as the diversity amongst the magazines.

To conclude the analysis clearly identified the expected correlations between magazines- and advertisers' brands. It is yet to be further investigated if and how that influences advertising effectiveness; even though we are at this point positive this is the case.

3J. Time to blow up the digital life vest & Do the more digital magazine brands differ from the analogue ones

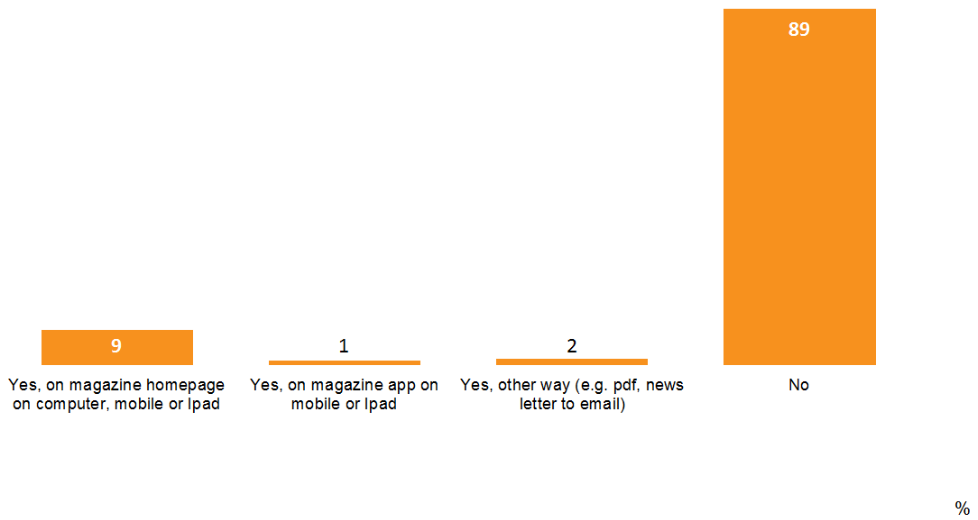
Digital is often perceived as a life vest for publishers but clearly this life vest in many cases still lies deflated in a well hidden storage room. Some seem to have put it on wrongly and are now bobbing around face down, drowning in the digital streams.

But then some actually have it on and the winds and currents seem to move them to palm dressed islands in the sun. But as we all know even there, there this always the fear of cannibalization.

When asking readers if they read "their" magazine in a digital format only 11,4 % claim to do so. This obviously indicates both an opportunity but also a yet not inflated digital life vest.

But also in this case variations between magazines are enormous. On a total and from a platform perspective it is still the www that completely dominates. Other digital platforms are almost immeasurable.

Digital reading



Interestingly enough the examples of magazines which manage to also reach a digital audience is not entirely self-explanatory. In some cases we see magazines as Mac world or magazines focusing on new gadgets and we instantly understand that they will have a digital audience because of their target group (if they wish) but then in some cases we have to look further beyond the obvious.

Like in the case of the "horse magazine" which managed extremely well not necessarily by target group but by their intelligent use of digital as an adder of a new dimension to the title both with time related content and up to date advertising.

So in order to answer the question on what differentiates the more digital magazines from the others we started by setting out a digital hypothesis:

The digital hypothesis that we set out to find an answer to was described like this:

Digital reading of a magazine brings additional value to the reader and one consequence to the publisher is that the reading of the analogue product will also increase. So we expect key KPI:s to get higher values.

Or

Digital reading of a magazine leads to a depletion of the analogue product and one consequence to the publisher is that the key KPI: s of the analogue product will decrease. So we expect key KPI:s to get lower values.

Or

The key KPI:s of the analogue product will not really be affected whether the magazine is highly digital or not. In other words – Digital will add new value to the brand but it will not really affect the relation to the analogue product.

Or / And

Whether the fundamental KPI:s change or not is also needed to be analysed by understanding the reading attributes of magazine reading. Since it could very well be that the What, When and How of magazine reading might or might not change in a digital age but the Why's are as important to understand.

So here we go.

A review of the ORVESTO QRS data reveals an interesting pattern, as illustrated in the tables below the issue of 'digital cannibalism' may be more complex than a first thought as the subject suggests. But it has to be pointed out once again that individual differences between many magazines are large.

But yes, it's fair to claim that there seem to exist a certain 'internal competition' between different platforms, 'cannibalism' if you like. This is e.g. indicated by the significantly lower average number of pick-ups among magazines with a high proportion of digital readers and somewhat lower levels of readers claiming they would really miss the paper edition would it cease to be published.

But at the same time, on the contrary, we notice increasing levels of time spent reading the paper edition in the same group of magazines.

	Proportion of digital readers (magazines) % and Index			
	Low	Medium	High	Total
Avg. reading time (minutes)	30,8 (95)	31,3 (97)	34,6 (107)	32,3
Avg. % amount of reading	75,7 (101)	74,7 (100)	73,9 (99)	74,8
Avg. number of pic ups	2,4 (104)	2,3 (100)	2,2 (96)	2,3

	Proportion of digital readers			
	Low	Medium	High	Total
Mean % "Would miss paper issue…" (4+5)	48,3 (104)	46,4 (100)	45,4 (97)	46,6

At this point we do not know whether these are causal correlations but our hypothesis is readers tend to 'optimize' their use of different platforms (even within a given magazine brand), in a continuous 'platform/content evolution' process.

The reading experience as such becomes increasingly important for the value of the printed copy while other functions are better suited on digital platforms due to increased flexibility, ability to interact and compare etc.

It is in this context it is interesting to see that many of the magazines that were among the top ranked on an overall score are magazines containing much to read and a genuine reading experience (long and extensive articles, heavy analysis etc.).

This situation corresponds with our hypothesis; in a highly developed digital media landscape the reading experience as such of a printed edition of a magazine may become more and more important.

And at the same time, the sky is the limit when it comes to possibilities to develop and deepen the relationship with readers on digital platforms. A well-managed coexistence of printed and digital editions of any given magazine is most likely a winning concept, both commercially and from a value creating point of view.

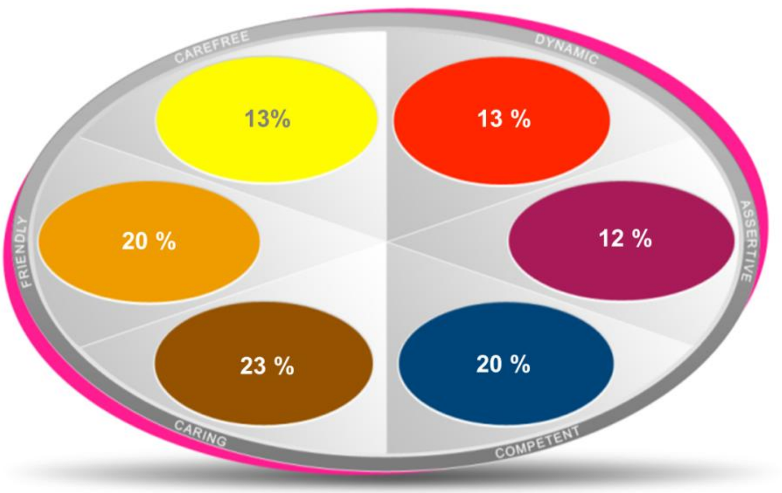
From an advertising point of view our findings suggests magazines are at risk losing of exposures in the paper edition if and when additional services are offered on digital platforms. But differences are small, and additional digital exposures would most probably compensate for such a loss. Not to mention all other possible benefits an integrated multimedia advertising environment offers.

Does this mean all commercial development should be focused to the digital platforms? Our findings suggest that that might be a limiting strategy for many magazines.

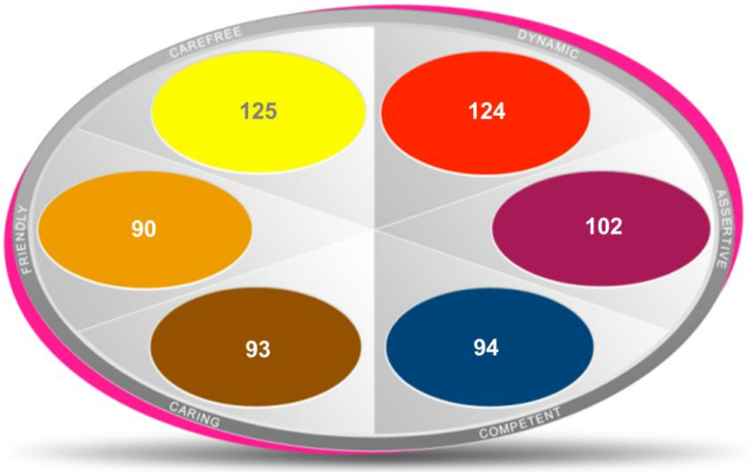
When we for instance reviews the attitudes towards advertisements in the printed editions we find a more positive and adoptive perspective among readers of magazines with a high proportion of digital readers. This indicates that a well performed and focused multiplatform strategy contributes to the commercial prerequisites rather than undermining them.

	Proportion of digital readers			
	Low	Medium	High	Total
Advertisements in the magazine gives good information	24,3	27,3	29,1	27,0
Advertisements in the magazine inspires me	18,3	19,7	19,6	19,2
I like reading the advertisements	17,0	19,4	19,5	18,7
I often shop products I have seen in the magazine	5,6	6,5	6,9	6,3
I often talk about things I have seen or read about in the magazine	17,0	20,8	23,4	20,5
I often discuss/comments on Internet about things I have seen or read about in the magazine	4,3	6,1	6,9	5,8
Things I read in the magazine often make me search for further info. on Internet	11,9	14,5	19,5	15,4
I read and keep the magazine in order to pick it up later	29,4	30,7	30,2	30,1

It has already been described that magazines as a media category are hugely overrepresented in the south eastern segments in the Needscope-model.



But the magazines with the highest digital reading have a slightly different pattern. We still see that the south eastern overrepresentation still prevails but it is obvious that the more digital magazines are levelling the field (see percentage/index graphs). The jury is still out on the verdict whether this means that these magazines already had a different pattern (and that this just shows that the early adoption has happened in these segments since they were already large) or does it mean that magazines can reach a "new" personality type to which the digital format is more suitable.



So the digital hypothesis which seems to be the correct one is the one claiming that digital reading affects the fundamental KPI:s of the print magazine. But it does so in different directions. And it seems as simultaneous digital reading of a magazine further emphasises the traditional print values in the printed magazine.

4. Conclusions

- The magazine market is diverse beyond belief and magazines do it differently from each other.
- The reading fundamentals of magazines have undergone rather large changes since 2006. Nowadays we read less in the magazine, we read fewer times but we read for a longer time. Reading at home and subscription has increased since 2006.
- The love for printed magazines is still out there and there exist a clear correlation between appreciation for a magazine and a high quality reading index.
- Advertising avoidance has finally reached the magazine industry but there still exist a special relationship between the readers of a magazine and its advertising.
- Magazines are still a ignitor of fiery conversations but the lights have been dimmed since magazines role as a creator of analogue and digital dimensions has diminished in the digital era.
- This is probably a consequence of the fact that magazines seem to have strengthen it roles as a logged out relaxing at home experience.
- Events are a powerful way to develop magazine brands.
- Magazines seem to have lost out on many functional dimensions whereas the underlying emotional motivations seem to have gained strength.
- Magazine brands should focus more on their own brand and the understanding of it. Magazine brands are diverse and through that diversity efficient business drivers for advertisers.

- Highly digitally read magazines have higher reading times but lower number of pick-ups. It seems as the co- existence of a digitally read product should force publishers to put more focus on the print title to further develop its traditional print values. So in order to develop a digital product further it is of huge importance to firstly understand the drivers behind reading of the print title and secondly to develop these alongside the development of the digital product.

Appendix – Questionnaire

1. How did you get hold of the last issue you read of [MAGAZINE]?

1. Subscribed in the household
2. Bought a copy myself
3. Someone else in household bought a copy
4. Got the magazine from an acquaintance
5. Got the magazine via membership
6. Outside my home (hairdresser, waiting rooms, train / flight or similar)
7. Other place, namely:
8. Never read

2. If you think about how you normally read [MAGAZINE], how many times do you read in a single issue? Count all the times you read a single issue.

1. 1 time
2. 2 times
3. 3 times
4. 4 times
5. 5 times
6. 6 times
7. 7 times
8. 8 times
9. 9 times
10. 10 times or more

3. Out of the issues you read of [MAGAZINE], how large proportion of pages do you usually read or browse through? Select the option that comes closest. Remember that you can read the magazine several times. Proportion of opened pages:

1. 10% (a few pages)
2. 20%
3. 30%
4. 40%
5. 50%
6. 60%
7. 70%
8. 80%
9. 90%
10. 100% (all pages)

4. Approximately how long time do you usually spend in total on an issue of [MAGAZINE]?

1. Maximum of 5 minutes

2. 5-10 min
3. 11-20 min
4. 21-30 min
5. 31-40 min
6. 41-60 min
7. 1-1½- hrs
8. Approx. 2 hrs
9. Approx. 3 hrs
10. 4 hours or longer

5. Where do you usually read [MAGAZINE]?

1. At home
2. On public transportations
3. At work
4. At relatives or friends house
5. Outside my home (hairdresser, waiting rooms, train / flight or similar)
6. Somwhere else, namely:

6. Please indicate to what extent you agree with the following statements about [MAGAZINE]. Answer on a scale of 1 to 5 where 1 means totally disagree and 5 means totally agree.

1. I look forward to reading [MAGAZINE]
2. [MAGAZINE] is unique in its kind
3. I feel connected with others who read [MAGAZINE]
4. The ads in [MAGAZINE] often gives me good information about things I'm interested in
5. Ads in [MAGAZINE] often inspires me
6. I enjoy reading the ads in [MAGAZINE]
7. I often buy things that I've seen advertised in [MAGAZINE]
8. I often talk about things I have read about or seen in [MAGAZINE]
9. I often discuss / comment on the Internet about things I have read about or seen in [MAGAZINE]
10. Things I read in [MAGAZINE] often makes me to go to the Internet and find more information
11. I read [MAGAZINE], save it and return to it
12. [MAGAZINE] gives me entertainment
13. [MAGAZINE] makes me feel satisfied
14. [MAGAZINE] is inspired
15. [MAGAZINE] helps me to relax
16. I read [MAGAZINE] when I have time for myself
17. It is stimulating to read [MAGAZINE]
18. It is exciting to read [MAGAZINE]
19. [MAGAZINE] gives me new information
20. [MAGAZINE] gives me new ideas / advice
21. [MAGAZINE] allowes me to try new things I have read about
22. I often learn new things by reading [MAGAZINE]
23. [MAGAZINE] affects my way of looking at things
24. It is stimulating to read [MAGAZINE]

7. Please indicate to what extent you agree with the following statements about [MAGAZINE]. Answer on a scale of 1 to 5 where 1 means totally disagree and 5 means totally agree.

1. [MAGAZINE] is credible, we can trust what it writes
2. [MAGAZINE] is a magazine with good reputation
3. [MAGAZINE] is well written
4. [MAGAZINE] writes about many different subjects
5. [MAGAZINE] is current / and reflects the latest
6. [MAGAZINE] is trend-setting
7. [MAGAZINE] often surprises
8. [MAGAZINE] is modern and with the times
9. [MAGAZINE] contains good analysis

10. [MAGAZINE] is educating/increases public knowledge
11. [MAGAZINE] is glamorous
12. [MAGAZINE] contains much to read
13. [MAGAZINE] contains in-depth articles
14. [MAGAZINE] provides revealing articles

8. If [MAGAZINE] organized events / meetings for their readers. How likely is it that you would visit one?

1. 1 Not at all likely
2. 2
3. 3
4. 4
5. 5 Very likely
6. Don't know

9. Sometimes one feels that it happens a lot around a company and it feels like it's advancing. Would you say that [MAGAZINE] is a magazine that it happens a lot around and that it is advancing/on it's way forward/upward? Answer on a scale of 1 to 5 where 1 means totally disagree and 5 means totally agree.

1. 1 Totally disagree
2. 2
3. 3
4. 4
5. 5 Totally agree
6. Don't know

10. How likely is it that you would recommend [MAGAZINE] to someone you know?

1. 0 Not at all likely
2. 1
3. 2
4. 3
5. 4
6. 5
7. 6
8. 7
9. 8
10. 9
11. 10 Very likely

11. If [MAGAZINE] wouldn't be published anymore, how much would you miss it?

1. Very much
2. Quite
3. Quite little
4. Not at all

12. What overall rating would you give [MAGAZINE] - where 1 is a very poor magazine and 10 is a very good magazine?

1. 1 Very poor
2. 2
3. 3
4. 4
5. 5
6. 6
7. 7

8. 8
9. 9
10. 10 Very good

13. Needscope

14. Do you read [MAGAZINE] in other ways than the printed version?

1. Yes, on the magazine website via e.g. computer, mobile or Ipad
2. Yes, the magazine app via e.g. mobile or iPad
3. Yes, otherwise (PDF newsletter via e-mail or similar)
4. No