



Magazine Media Sells: Validating Secondary Audience



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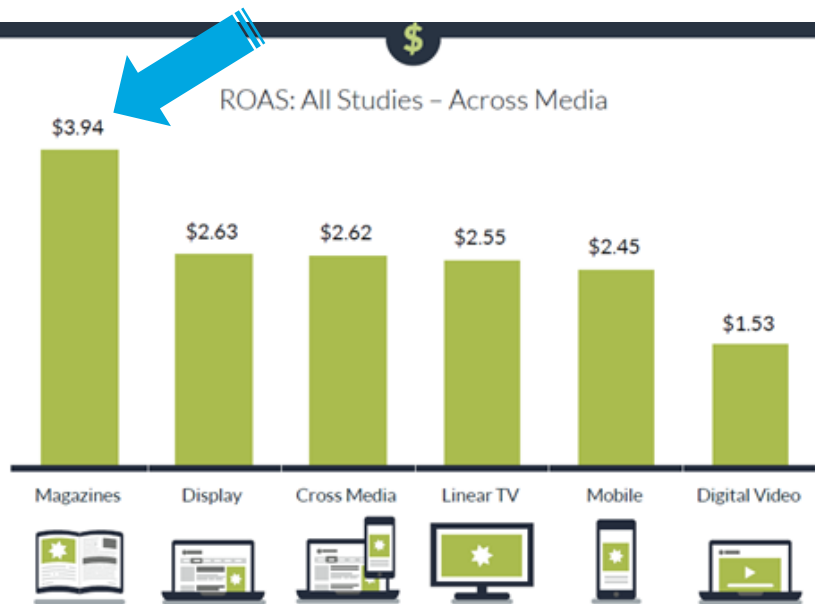
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Agenda

- Objective
- Issue Specific
- Methodology
- Findings/Benefits
- Next Steps

Magazine Media: ROAS leader



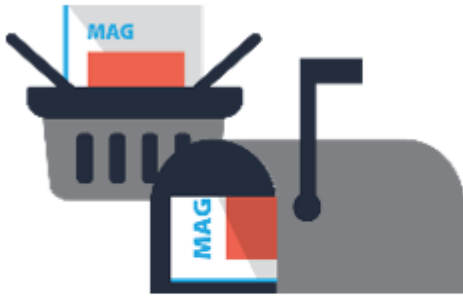
- 75+ Magazine Sales Effect Studies
- 1,400 Campaigns
- **NOW:** Apples to Apples Comparison



How?

New Methodology
Primary + Secondary Match

Primary



Read copy purchased
by household
(subscription/newsstand)

Secondary



Read copy not
purchased by reader
(or household)

Evolution of MAGAZINE SALES MEASUREMENT

Meredith/NCS
Print Sales Effect

Meredith Sales
Guarantee



Industry Sales
Guarantee



INTRODUCING:
Secondary
Audience
Validation

2011

2012

2015

Today



Time Inc.



Partnership with:
GfK MRI's
Issue Specific Study

GfK MRI's Issue Specific Study

- ✓ Companion to GfK MRI's National average issue readership study
- ✓ Measures issue to issue audience variability
- ✓ Respondent level data well suited to project since readers and non-readers are identified



GfK MRI's Issue Specific Study

Measuring Specific Magazine Issues

Respondents choose logos for titles they read/looked into in the last six months

For titles screened in, respondents view recent cover images and indicate whether they read specific issues

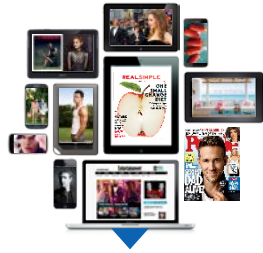
200,000 + surveys conducted each year

Conducted online, with 4,000 new respondents each week

170 titles/2,500 issues measured annually

NCS Sales Effect: Methodology

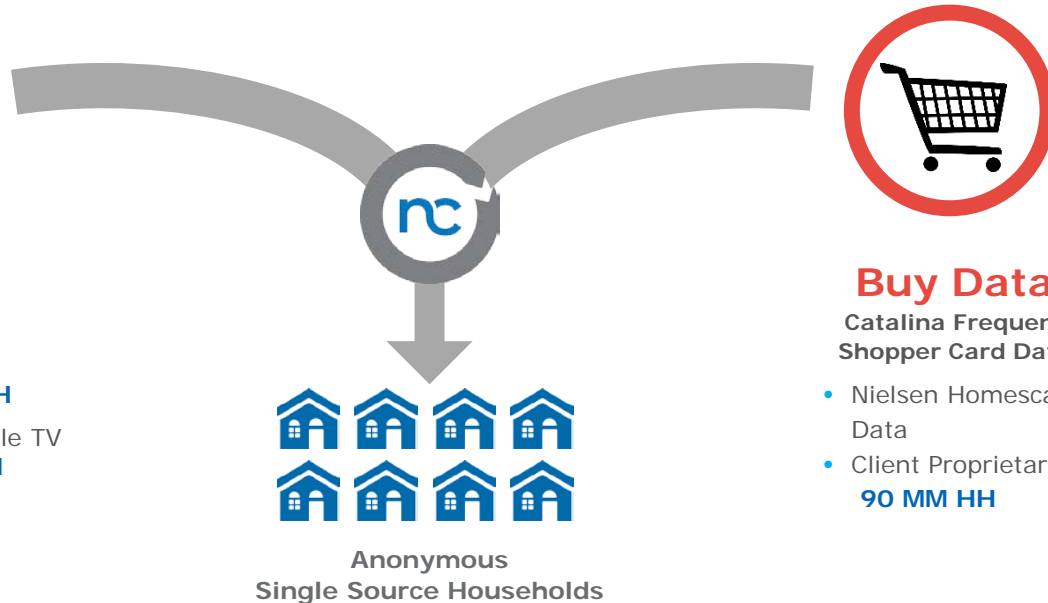
NCS connects the **media** people consume with the products they **buy**



Exposure Data

Nielsen Media Data

Linear TV Data	Mobile
4.3 MM HH	80 MM HH
Desktop Digital	Addressable TV
100 MM HH	40MM HH
Client Proprietary Print	
50 MM HH	



Buy Data

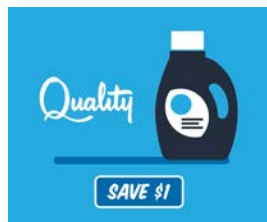
Catalina Frequent Shopper Card Data

- Nielsen Homescan All-Outlet Data
- Client Proprietary Sales Data **90 MM HH**



How NCS Measures the Sales Effect: Test vs. Control

Test Design and Treatment Execution



Exposed households isolated in database

Tags embedded into creative ad units or exposures obtained by a direct match.

Exposed & Unexposed HHs matched on 500+ variables to isolate ad impact

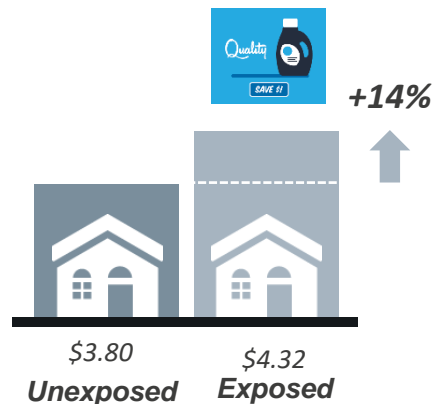


Exposed Households



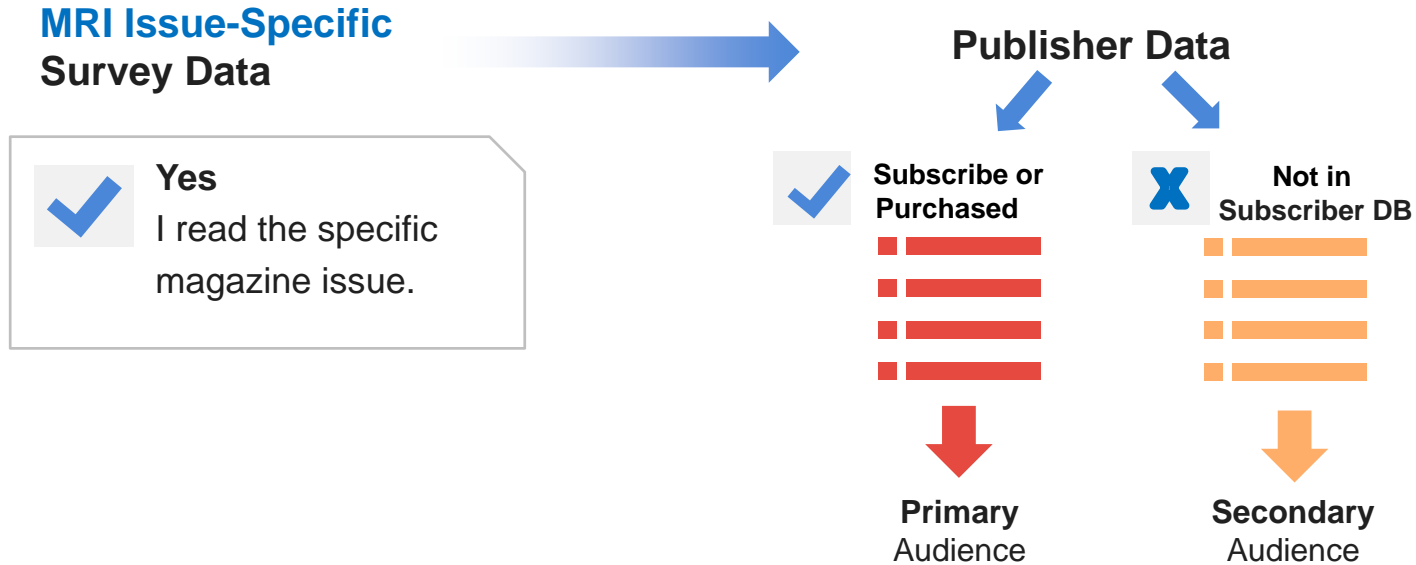
Unexposed Households

Measure Sales Impact by focusing on purchasing patterns



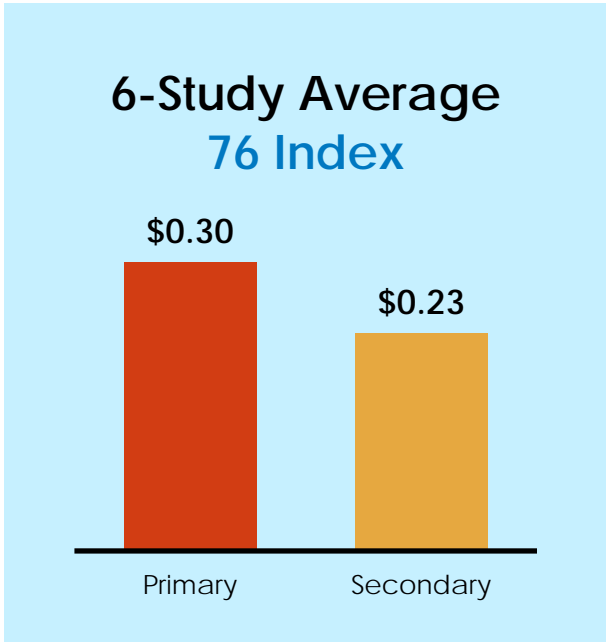
Total Brand Difference: \$0.52
Avg/ HHLD % Difference: +14%

Using MRI and Publisher Data to Isolate The Secondary Audience



Sales Contribution of Secondary Magazine Readers

76 Index to Primary Readers



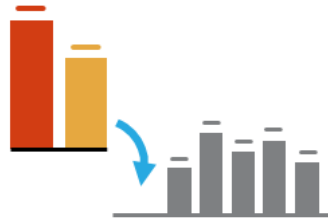
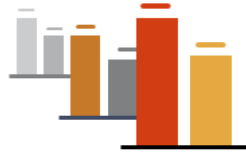
Incremental Sales per Reached Household



■ Primary Audience
 ■ Secondary Audience

Magazine Methodology: Primary vs. Secondary

76% ↩

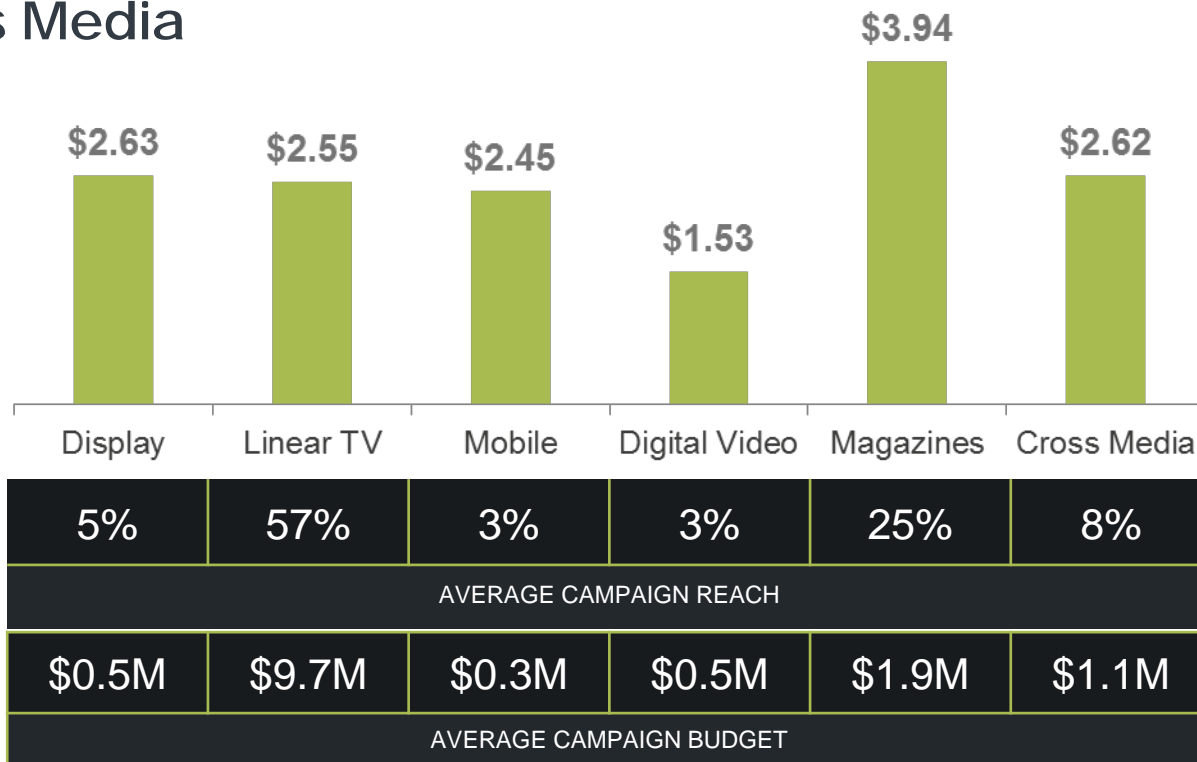


- We applied the factor to all past studies based on the percent of each campaign that was primary vs. secondary
 - The secondary audience was weighted at **76%** of the incremental sales contribution of the primary audience
- Each study was then included in our Norms based on the re-factored totals
- Going forward all magazine studies will include the measurement of the secondary audiences lift using GfK MRI's issue-specific research





ROAS: Across Media



Source: Nielsen Catalina Solutions, Multi-Media Sales Effect Studies from 2004 – Q4 2015. Copyright 2016 © Nielsen Catalina Solutions



Key Findings:

Publishers

- Quantifies and validates **total audience** contribution to sales
- Allows **more publishers** to be included in sales lift studies
- More **accurate input** for cross-media / publisher studies
- **Apples to apples** comparison with other media

Secondary Contributes 76% of Primary Sales Response

Advertisers

- Seamlessly evaluate sales lift **across magazines** in totality for total campaign sales lift
- **Further proof** that advertising in magazines drives sales – both paying subscribers and newsstand buyers and “pass-along” readers.
- Affirms value of **secondary audience**

Going forward:

- All studies – from advertisers or publishers - will include a measured secondary audience measure
- NCS will conduct quarterly matches with GfK MRI's Issue Specific Study
- Meredith, Time Inc. and NCS will continue to track including:
 - By category (food, beauty, pet, etc.),
 - By frequency/type (monthly vs. weekly, subscriber vs. newsstand, RPC)
 - By campaign element (reach, duration, etc.)Plan element secondary audience/RPC,
- Results will be analyzed regularly and findings will be shared in future papers

