

How Magazines Work at Retail



other lines of enquiry

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Section 1

INTRODUCTION

1.1 Background & Brief

1.2 Methodology

1.1 BACKGROUND & BRIEF

The magazine newsstand is becoming an increasingly complex and competitive battleground for the consumer's attention and spend.

PPA had already commissioned two in-store interview projects about how people buy magazines in different retail outlets:

- “Magazines & the Independent Retailer: the Retail & Consumer Perspective” (BrandLab): May 2003.
- “Magazines & the Multiple Retailer: The Consumer Perspective” (Brandlab): September 2003

This latest wave of research focuses more on the magazine racks themselves through a mix of quantitative and qualitative research and through structured questionnaires, discursive interviews and observed shopping.

The aim is to understand better what drives magazine shopping and then how the magazine racks are “shopped.”

PPA commissioned **Other Lines of Enquiry** to conduct the fieldwork and **Wessenden Marketing** to analyse the results.

1.2 METHODOLOGY

Both quantitative and qualitative methodologies were employed.

1. QUANTITATIVE

In-store face-to-face interviews with 600 adults aged 16+. Respondents were interviewed as they exited the store in a 10 minute interview.

Sample Profile (600 Respondents)				
Gender	Male	293	49%	National Profile
	Female	307	51%	
Age	16-24	94	16%	National Profile
	25-34	99	17%	
	35-44	113	19%	
	45-54	93	16%	
	55-64	85	14%	
	65+	116	19%	
Socio Economic Group	AB	150	25%	National Profile
	C1	175	29%	
	C2	125	21%	
	DE	150	25%	
Magazine Buying	Mag Buyers	316	53%	Research Quota
	Non-Mag Buyers	284	47%	
Store Type	Tesco	192	32%	Research Quota
	WHSmith	213	36%	
	Mills	195	33%	

Interviews took place in three store fascias:

- Tesco (Supermarket)
- WHSmith (High Street)
- Mills (Convenience stores)

Interviews took place in the following locations: Newcastle, York, Manchester, Birmingham, Watford & London.

The sample profile followed the adult UK 16+ population in terms of age, gender and socio economic group (SEG). Quotas were set for store type and for the balance between magazine and non-magazine buyers.

2. QUALITATIVE

21 magazine shoppers were tracked in-store in each of the three store fascias.

- “X-ray spex” surveillance technology was used to see how these shoppers moved along the shelves – each respondent wore spectacles carrying small video cameras which showed what they were looking at as they moved around the magazine racks.
- All the 21 shoppers were then interviewed afterwards to comment on their actions – their shopping patterns were played back to them so that they could see what they had actually done.

Unless otherwise stated, all data in this report is sourced from the Other Lines of Enquiry fieldwork.

Section 2

MANAGEMENT SUMMMARY

2 MANAGEMENT SUMMARY

The report provides a wide range of detailed insights into how and why consumers buy magazines. Yet there are a number of key themes.

Each retailer is different

The consumer offer and frequency of shop visit for each of the three retail store types surveyed is fundamentally different and the magazine category plays a slightly different role in each one. Understanding this and creating channel strategies and consumer offers that reflect these differences is essential for the publishing business.

Each consumer is different

Each consumer:

- Has a range of shops that they buy magazines from
- Can buy magazines in a variety of moods, in a range of “shopping missions” and with different amounts of time to spend on choosing magazines at different times of the month.
- Has a unique repertoire of favoured magazines that they buy from.

Understanding these constantly shifting consumer dynamics is central to modern magazine marketing.

Magazine buyers are different

Magazine buyers are:

- Younger
- More upmarket
- Spend 60% more in-store than non-magazine buyers

They are affluent, influential and “savvy” consumers and this is a very strong message that the publishing industry can carry to trade partners.

Magazines are engaging

The quantitative survey shows that browsing and buying magazines is a pleasurable experience in its own right and adds colour to the shopping trip. The qualitative interviews underline just how knowledgeable and passionate consumers can be about magazines which they often feel are written and tailored for them. They have very clear views as to the strengths (and weaknesses) of many different titles. They are conscious of quite subtle editorial changes. Some are aware of publishing frequencies and on-sale dates.

Magazine purchasing is complex

How the consumer shops the magazine shelves depends on a number of factors relating to that specific shopping trip. Any research project is simply picking up a single snapshot of a purchasing process which can change from visit to visit through the month.

The choice of magazine may be planned and predetermined well before the shop visit. It may be made completely on the spur of the moment. Yet this research project provides hints that the choice of magazine is often more impulsive and adventurous than many consumers think it is, with many buying decisions being driven at the magazine racks by covers and cover lines.

CONCLUSIONS & ACTION POINTS

Any research project of this kind, which attempts to straddle the whole magazine market, cannot provide the detailed insights to drive the marketing strategy of a specific title. Yet it can define the issues and variables which every title must address.

For the publisher, the issues include:

- Understanding how each retail channel works and how magazines fit into their consumer offer. They are all different and need distinct approaches.
- Understanding the brand values of the magazine. The consumer has very clear (and often difficult-to-shift) views about what each title offers.
- Understanding the magazine competition. There is so much variety of product on offer that consumers can (and do) change allegiance from issue to issue, sometimes without realising it!
- Understanding magazine promotions. While the sales figures show that globally cover mounts and polybags “work” in terms of boosting overall sales, the consumer is actually quite ambivalent about them. On one hand, shoppers appreciate why issues are bagged (to protect gifts, hold in inserts, etc.). On the other, shoppers feel that bags hinder the all-important browsing process and are disliked for that reason.
- Understanding the consumer’s magazine repertoire. This is much more wide-ranging than a simple list of all the competitive titles within a single editorial sector. It is cross-sector and also, increasingly, cross-media.

- Understanding how covers and cover lines work. They influence a significant number of buying decisions as consumers increasingly search for products which speak to them about their own specific needs and interests.
- Understanding cover price sensitivity. This is a complex and difficult area and is probably the biggest (and least understood) issue driving the whole publishing model.

For the retailer, there is a clear need to improve in-store displays of magazines. The resounding conclusions of the consumer interviews are that (1) shoppers want clean, neat and structured displays and do not always get this from the retailers that they visit and (2) shoppers simply do not notice most of the retailers’ current in-store promotional devices – more creativity is required, perhaps with more focus on magazine launches. Also, the space and freedom to browse are essential for any magazine retailer.

The research raises a massive marketing issue. It is often assumed that magazine sales will grow if the industry adds more excitement and “retail theatre” to the whole in-store magazine buying experience. Yet publishers have to define what “retail theatre” actually means in practice and to assess whether the consumer actually want it. This research suggests that there may be sufficient “theatre” in the magazine product itself and that the challenge is to release that more fully on the magazine racks.

Section 3

THE RESEARCH FINDINGS

3.1 The retail context

3.2 What makes magazine buyers different

3.3 The role of magazines in the shopping trip

3.4 How consumers choose their magazines

3.5 The magazine retailing environment

3.6 At the magazine racks

3.7 Retailer profiles

3.1. THE RETAIL CONTEXT

Retail Multiple Shares

The retail market for magazines is fast-moving and over the longer term has shifted towards the supermarket and convenience store sectors away from the more traditional High Street and CTN formats.

The three fascias covered in this research project (Tesco Supermarkets, WHSmith High Street and Mills Convenience Stores) accounted for almost 20% of magazine Retail Sales Value (RSV) in 2005.

Retail Shares of Regular Frequency Magazine RSV			
Retail Group	2004	2005	% Change
Tesco	9.8	11.4	17
WHSmith High Street	9.7	9.6	-1
Co-op	5.4	5.4	-1
Sainsbury's	4.7	4.7	1
Asda	4.1	4.2	4
WHSmith Travel	4.0	4.1	3
Morrisons (incl Safeway)	4.2	3.8	-11
TM Retail	3.6	3.6	-1
Somerfield	1.4	1.8	33
Spar	1.3	1.3	0
One-Stop	1.4	1.0	-34
Waitrose	0.8	0.9	14
Alpha	0.5	0.6	18
Woolworths	0.6	0.6	-11
Stars News	0.4	0.3	-9
United News	0.2	0.2	3
Other Retail Multiples	10.5	11.1	6
Independents	37.4	35.4	-5
TOTAL	100.0	100.0	

Source: Seymour & Wessenden Marketing

How the Retailers' Shopper Profiles Differ

			Store Type Indexed on Total Profile		
		Total Profile	Tesco	WHSmith	Mills
Gender	Male	49%	90	100	109
	Female	51%	109	100	91
Age	16-24	16%	54	137	105
	25-34	17%	95	105	99
	35-44	19%	93	98	108
	45-54	16%	108	98	94
	55-64	14%	77	106	116
	65+	19%	159	65	81
Socio Economic Group	AB	25%	121	84	98
	C1	29%	76	119	103
	C2	21%	85	120	93
	DE	25%	120	78	105

Base: All respondents

Shaded cells are where index is over 105

TESCO SHOPPERS

- A slight female bias.
- A slight bias to the 45-54 group and a strong skew to the over 65s.
- Peaks at the two extremes of Socio Economic Group (SEG) in ABs and DEs.

WHSMITH SHOPPERS

- In line with the average profile in terms of gender.
- Pronounced age peaks in the 16-24 and 55-64 age groups.
- A strong base in the “middle market” C1 and C2 categories.

MILLS SHOPPERS

- A slight male bias.
- A more “middle aged” profile.
- No clear bias in terms of SEG.

What Drives the Shopping Trip

The following tables show the top 5 product categories which drive the shopping trip in each outlet type. What is clear is how fundamentally different the consumer offer is in each of the three store fascias.

Which of the following purchase items was your main reason for visiting this store today?

TESCO SHOPPERS		
1	Groceries	73%
2	Flowers	7%
3	Newspapers	4%
4	Greetings cards	4%
5	Magazines	3%
	Other	9%
TOTAL		100%

WHSMITH SHOPPERS		
1	Magazines	29%
2	Greetings cards	17%
3	Newspapers	12%
4	CDs/DVDs/Games	10%
5	Books	9%
	Other	23%
TOTAL		100%

MILLS SHOPPERS		
1	Newspapers	25%
2	Magazines	16%
3	Tobacco	11%
4	Groceries	10%
5	Greetings cards	9%
	Other	29%
TOTAL		100%

Base: All respondents

TESCO

While non-food products are increasingly important to the supermarkets and account for over 20% of Tesco's UK sales, unsurprisingly it is still food which is the prime motivator for the shop visit.

However, magazines are among the top five product categories driving the Tesco shop visit.

WHSMITH SHOPPERS

Magazines are by far the single most important category driving the visit to WHSmith's High Street shops.

MILLS

Mills still has a more traditional CTN profile where newspapers drive a high-frequency pattern of shop visits, but where magazines are also an important visit motivator.

Frequency of Purchasing Primary Products

Respondents were questioned about how often they bought the primary product which drove this specific shop visit (those who had been driven by a magazine purchase were excluded).

How often do you buy primary (non-magazine) product?		
Store Type	Times per Week	Times per Month
Tesco	1.9	8.4
WHSmith	1.7	7.2
Mills	2.9	12.7
TOTAL	2.2	9.5

Base: All without mags as primary purchase

Mills shoppers, driven by newspaper and tobacco purchases, have the most frequent shopping “pulse”. WHSmith shoppers, have the least frequent pulse.

Frequency of Purchasing Magazines

Respondents were then asked how often they bought magazines, which on average is 2.8 times per month.

How often do you buy?.....(times per month)			
Store Type	Primary Non-Mag Product	Mags	Mags as % of Primary
Tesco	8.4	2.8	33%
WHSmith	7.2	3.1	43%
Mills	12.7	2.6	20%
TOTAL	9.5	2.8	29%

Base: All respondents

WHSmith shoppers are the most frequent magazine buyers and Mills shoppers the least frequent.

When this is set against Mills’ rapid pulse rate on its primary products, the Mills’ magazine purchase rate is running at only 20% of its main product purchase rate.

Where Consumers Buy Their Magazines

What is clear from previous research projects (notably Brandlab's "Magazines & the Multiple Retailer: September 2003") is that most consumers have a repertoire of shops that they buy their magazines from. The Brandlab research showed that this was just under three shops on average.

In this research project, respondents were also asked where they usually bought their magazines:

Where do you usually buy magazines?	
Store Type	TOTAL
Supermarket	37
Newsagent	22
WHSmith	14
Convenience Store	14
Other	12
Petrol Station	1
TOTAL	100

Base: All respondents

The supermarket is the prime location for magazine buying with 37% of the sample claiming it as their usual source of magazines. Yet all of the interviewees stated that they had more than one shop that they bought magazines from on a regular basis: "It all depends where I am at the time I want a magazine." was an often-repeated statement.

"I normally come into town on my day off so I'll drop into Smiths then and have a look around, but I often buy magazines as part of my food shopping." (Male WHSmith shopper)

"I do my weekly food shop in Tesco, so I'll have a look at the magazines then. I don't go into town that often as it's more of a hassle – that's where Smiths is, but I'll go into Smiths then when I'm there. I'll also go into Smiths when I'm travelling with my work at a station or an airport. So I suppose I buy magazines from quite a few places." (Male, Tesco shopper)

"I spend more time in Tesco browsing. It's more of a treat going to Tesco. There's plenty of time and space to browse, it's more like a trip out. Going into town is more of a chore and feels more pressured – I'll go to Smiths then. This shop (Mills) is convenient, but I tend to be in and out of here quite quickly." (Female Mills shopper)

Very consistent views about the different kinds of outlets emerged from the interviews:

SUPERMARKETS:

- Convenient, as the magazine purchase can be just part of the overall shopping trip and need not take up much time. Respondents were divided as to whether they wanted the magazine purchase to be quick and simple (these tended to be consumers making a habitual purchase, typically a TV listings title or a women's weekly) and those who wanted to linger over the magazine purchase. The former particularly appreciated the convenient location of the supermarket.
- The space to browse.
- A good range of titles – not the most extensive (WHSmith was seen as the clear winner here), but better than neighbourhood shops and wide enough for their normal magazine requirements. "If I need something special I'll just go to Smiths another time."

WHSMITH

- Not as convenient a location as the supermarket. *“When I come downtown, I’ll pop into Smiths, but downtown is a bit of a hassle and I’m not here every week unlike the supermarket.”*
- Not always the space to browse (as there are so many browsers!), but there is no pressure about browsing whereas there can be in a local newsagent.
- Sometimes very busy, especially at weekends and lunchtimes.
- **The** place to come for the widest magazine range.

MILLS

- A good range, but not as good as WHSmith.
- Slightly cramped and cluttered with the shelves not as well organised as Tesco and WHSmith in terms of overlapping magazines and the clear division of the shelves into magazine sectors.
- Not a place to browse for too long, but much better than a local newsagent.

OTHER LOCAL NEWSAGENTS / CTNs

These might be conveniently located, but they were not seen as offering a wide range of magazine product or of having them well displayed.

The table below goes into more detail as to where people buy their magazines, broken down by the three different store types. The shaded cells highlight the store type that is related to where the interview took place.

Where do you usually buy magazines?				
Store Type	Tesco	WHSmith	Mills	TOTAL
Supermarket	73	25	14	37
WHSmith	1	38	1	14
Petrol Station	0	1	1	1
Newsagent	10	20	36	22
Convenience Store	2	3	39	14
Other	14	13	9	12
TOTAL	100	100	100	100

Base: All respondents

TESCO SHOPPERS

- Loyal to the supermarket format.
- Little crossover with WHSmith.
- The major source of magazine purchasing.

WHSMITH SHOPPERS

- Relatively low loyalty to WHS.
- Supermarkets next biggest source of mags.
- Broader range of sources than supermarket shoppers.

MILLS SHOPPERS

- Relatively low loyalty to own format (convenience stores).
- High crossover with traditional newsagents (Mills has a mixed newsagent and convenience portfolio and a more traditional magazine buyer).

3.2 WHAT MAKES MAGAZINE BUYERS DIFFERENT

The exit interviews distinguished between respondents who had bought a magazine on that specific shopping trip (“magazine buyers”) as opposed to those who had not (“non-magazine buyers”).

This does not mean that “non-magazine buyers” never buy any magazines at all, simply that they had not bought any on that specific shopping trip. Yet there are significant differences between these two groups of consumers.

In terms of **demographics**, the magazine buyers are.....

- More likely to be female.
- Younger.
- More upmarket.

In terms of their **magazine purchasing**, magazine buyers are (predictably) more committed to the whole magazine buying process and enjoy it more. They.....

- Buy more magazines.
- Enjoy buying magazines as part of the shopping trip.
- Regard the magazine as more of a treat.
- Are less planned in their magazine purchasing and are more likely to buy on impulse.
- Are more likely to use both supermarkets and WHSmith as their usual magazine shop.

Yet most significantly, magazine buyers spend 60% more than non-magazine buyers in terms of their total retail basket size (see Section 3.3 for more details).

		Mag Buyer	Non-Mag Buyer	Mag Buyer Index
Gender	Male	47%	51%	91
	Female	53%	49%	110
Age	16-24	16%	16%	102
	25-34	19%	14%	142
	35-44	20%	18%	113
	45-54	17%	14%	118
	55-64	13%	15%	89
	65+	15%	24%	61
Socio Economic Group	AB	26%	24%	111
	C1	32%	26%	122
	C2	21%	21%	100
	DE	21%	29%	71

Usual magazine shop

Supermarket	49%	24%	204
WHSmith	18%	9%	198
Petrol Station	1%	1%	71
Newsagent	19%	25%	75
Convenience Store	13%	16%	80
Other	1%	25%	3
TOTAL	100%	100%	

The Magazine Purchase

Mag purchase occasions per month	4.1	1.3	315
Enjoy buying magazines (% agreeing)	80%	41%	197
Treat purchase	66%	46%	143
Planned purchase	74%	89%	83
Total retail basket size per shop visit	£23.54	£14.71	160

Shaded cells = index of 110+

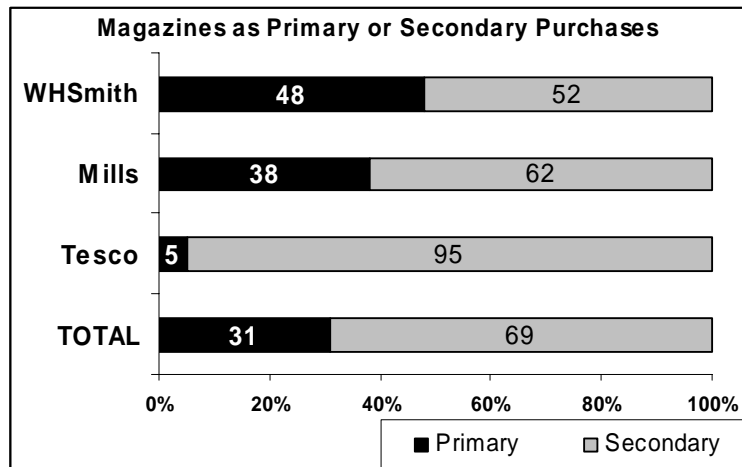
3.3 THE ROLE OF MAGAZINES IN THE SHOPPING TRIP

As Section 3.1 of this report (“The Retail Context”) demonstrates, the consumer offer of each of the three store types surveyed is very different in terms of what drives the actual shopping trip.

Magazines as Primary or Secondary Purchases

These differences in consumer offer are reflected in whether magazines are the prime driver of the shop visit (primary purchase) or are an add-on purchase once the consumer has gone to the shop for other reasons (secondary purchase).

The split between the primary and secondary purchasing of magazines by store type is shown in the chart below.



Base: All magazine buyers

Even among WHSmith shoppers, the magazine purchase is an add-on for over half (52%) of the magazine buyers. For supermarkets in particular, it can be seen that magazines are not major visit-drivers.

Yet there are two other factors which are also very significant in the shopping visit:

- Enjoyment
- Retail basket size

Both of these are looked at in the following sections.....

The Enjoyment of Magazine Buying

A very high 80% of magazine buyers enjoy the whole magazine buying process, with 40% enjoying it “a lot”, in comparison to only 28% who enjoy buying other non-magazine products a lot.

Enjoy a lot	40%
Enjoy a little	40%
Neither	13%
Do not really enjoy	5%
Do not enjoy at all	1%
Don't know	1%
TOTAL	100%

Base: All magazine buyers

The magazine enjoyment levels vary slightly by store type, but are all high.

	Tesco	WHSmith	Mills
Enjoy a lot	40%	47%	32%
Enjoy a little	35%	36%	52%
TOTAL ENJOY	75%	83%	84%

Base: All magazine buyers

The enjoyment of magazine buying came through strongly in the interviews:

"I was on my way to the make-up, but I didn't get past the magazines.....I just came in for some bits and bobs, but I always stop to look at the magazines." (Female Tesco shopper)

"I came in for a parking disk and a drink, but I thought I'd have a look at the magazines.....I'd better go because I've left my husband sitting in the car outside!" (Female Mills shopper)

"Because the big food shop is so boring, I like to look at the magazines first ." (Female Tesco shopper).

Retail Basket Size

The presence of a magazine in the consumer's shopping basket is very clearly linked to the total amount spent during the shopping visit.

This effect is very marked indeed in the Mills convenience stores where the average basket size is relatively small.

How much money did you spend in total in the store today?			
Store Type	Mag Buyer	Non-Mag Buyer	Mag Buyer % Uplift
Tesco	£46.45	£32.20	44%
WHSmith	£14.01	£9.92	41%
Mills	£8.54	£4.76	79%
TOTAL	£23.54	£14.71	60%

Base: All respondents

Overall, shoppers who bought a magazine spent 60% more during their shopping trip than non-magazine buyers.

3.4 HOW CONSUMERS CHOOSE THEIR MAGAZINES

Care in Purchasing

Magazines are a very carefully considered purchase with 79% of respondents claiming to choose their magazines “carefully”.

How carefully do you think about your choice when you buy a magazine?	
Very carefully	35%
Quite carefully	44%
Neither	11%
Not very carefully	9%
Not carefully at all	1%
Don't know	0%
TOTAL	100%

Base: All magazine buyers

- Women give more thought to their magazine choice than men (+11%).
- Under 35s give more thought than older age groups,
- The more upmarket the shopper, the more thought is given.

The profile by store type is shown in the table below:

How carefully do you think about your choice when you buy a magazine?			
	Tesco	WHSmith	Mills
Very carefully	40%	37%	27%
Quite carefully	36%	47%	49%
TOTAL CAREFULLY	76%	84%	76%

Base: All magazine buyers

Tesco has the highest proportion of “very careful” magazine shoppers with Mills the lowest.

Who This Magazine is Bought For

20% of magazine purchases are made for someone else beside the actual shopper:

- Men are more likely to buy for someone else than women (+44%).
- The youngest (16-24) and oldest (65+) age groups are the most likely to buy for others.
- Buying for others is also polarised by SEG with ABs and DEs being the most likely to buy for someone else.

The profile by store type is shown in the table below:

Who did you buy the magazine(s) for?			
	Tesco	WHSmith	Mills
Myself	74%	86%	81%
Someone else	26%	14%	19%
TOTAL	100%	100%	100%

Base: All magazine buyers

WHSmith has the highest level of self-purchasers and Tesco the highest level of proxy-purchasing for someone else. The interviews suggest that when buying for someone else, the title repertoire is very limited and specific: *“My daughter likes Vogue”, “My Dad always wants Readers Digest”*

The interviews also suggest that free gifts can have even more of an impact when the shopper is buying for someone else: *“I bought this Sugar for my daughter because of the free bag that’s with it. I wasn’t looking for it. It just caught my eye and I thought that she’d like it.” (Female Tesco shopper)*

How Magazines Generally are Bought: Planned versus Impulse

Respondents were asked whether they agreed with the following statements:

- “I had already decided to buy a magazine before I entered the store (planned).”
- “I decided to buy a magazine on the spur of the moment while I was shopping (impulse).”

Comparing the magazine results with other primary, but non-magazine products shows that magazines are less planned in advance than other products in the shopping trip: 74% of magazine buyers agreed that they knew they were going to buy a magazine before they entered the shop in comparison to 89% of respondents when considering other, non-magazine purchases.

Zooming in specifically on magazine buying, there is an overlap between the two questions with 12% of magazine buyers agreeing with both statements.

How Magazines are Bought	% Agreeing
I had already decided to buy a magazine before I entered the store	74%
I decided to buy a magazine on the spur of the moment while I was shopping	38%
TOTAL	112%

Base: All magazine buyers

What emerges from the qualitative research project is that consumers have a range of shopping trips through the month when magazines play different roles during the trip: sometimes magazines are on the “shopping list” and sometimes they are impulsive add-on purchases.

Looking at the basic demographics:

- There is little difference in planned/impulsive purchasing between men and women.

- Planned purchasing is at its strongest among the oldest 65+ group and impulsive purchasing at its strongest among the youngest 16-24 group.
- Planned purchasing is its strongest in the lowest SEG (DEs) and impulse purchasing at its strongest among the As.

The profile of planned magazine buying by store type is shown in the table below.

Magazine Purchasing	Tesco	WHSmith	Mills	TOTAL
Planned	79%	73%	68%	74%

Base: All magazine buyers

- Tesco, with its strong profile of weekly magazines, has the largest proportion of planned purchases.
- As WHSmith is regarded by many consumers as the place to go for a full range of titles, it also has a high level of planned purchases, but less than Tesco.
- Mills has the lowest levels of planned purchasing.

Why Magazines Generally are Bought: Treat versus Routine

Respondents were asked whether they agreed with the following statements:

- “A magazine is something I like to buy as a special treat for myself (treat).”
- “A magazine is something I like to buy out of routine (routine)”

Comparing the magazine results with other primary, but non-magazine products shows that magazines are more of a treat than other products in the shopping trip: 66% of magazine buyers agreed that they felt that their magazine was a treat in comparison to 46% of respondents when considering other, non-magazine purchases.

Zooming in specifically on magazine buying, there is an overlap between the two questions with 23% of magazine buyers agreeing with both statements.

Why Magazines are bought	% Agreeing
A magazine is something I like to buy as a special treat for myself	66%
A magazine is something I like to buy out of routine	58%
TOTAL	123%

Base: All magazine buyers

What emerges from the qualitative research project is that consumers have a repertoire of magazines that they buy from which usually include both routine titles (e.g. TV listings) and treat magazines titles (e.g. glossy monthlies). Sometimes both routine and treat purchases can be made in the same shopping trip. The more fringe titles are usually bought in a more impulsive and irregular way, often as unplanned add-ons to the core magazine purchase.

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"Tuesday is the day that Chat and Take a Break come out so I always get them then. It's just an automatic routine." (Female Mills shopper)

"No. Magazines aren't a special treat. I buy Radio Times and Bella each week as a matter of course. I also bought Readers Digest today, but that's for Dad because he's ill. I suppose that's a treat for him!" (Female Mills shopper)

Looking at the basic demographics:

- There is little difference in treat/routine purchasing between men and women.
- Treat purchasing is at it highest in the 55-64 year old age group.
- There is no clear pattern by SEG, but treat purchasing is at its highest among the A and C1 groups.

The profile of treat magazine buying by store type is shown in the table below.

Magazine Purchasing	Tesco	WHSmith	Mills	TOTAL
Treat	58%	69%	73%	66%

Base: All magazine buyers

Treat buying is at its highest among Mills shoppers and at its lowest among Tesco shoppers.

The table below shows the profile treat buying by magazine segment, which varies significantly.

Magazine Segment	Buy as a Treat
Men's Lifestyle	94%
Music	93%
Puzzles	91%
Adult	85%
Sport	81%
Leisure Interests	74%
Motoring & Motorcycling	70%
Women's Monthlies	68%
Women's Weeklies	67%
Buying & Selling	67%
ALL MAGAZINE AVERAGE	66%
Computing	65%
Home Interest	60%
Teenage	59%
Countryside & County	55%
TV Listings	50%

Base: All magazine buyers

How This Magazine was Bought: Levels of Impulse Purchasing

50% of magazine buyers claim that “I decide which magazine I am going to buy when I reach the newsstand.”

- Women are more likely (+13%) to impulse-purchase than men.
- There are significant, but irregular differences by age:

I decide which magazine I am going to buy when I reach the newsstand.		
Age Group	% Agreeing	Index
16-24	70%	142
35-34	46%	93
35-44	63%	127
45-54	59%	119
55-64	39%	78
65+	13%	26
TOTAL	50%	100

Base: All magazine buyers

- C2s are much more likely than any other SEG to impulse-buy.

- Mills shoppers are much more likely than Tesco shoppers to impulse-buy.

I decide which magazine I am going to buy when I reach the newsstand.		
Store Type	% Agreeing	Index
Tesco	35%	71
WHSmith	51%	103
Mills	66%	132
TOTAL	50%	100

Base: All magazine buyers

In the interviews, there is clearly some confusion in some respondents’ minds as to just where the magazine purchase actually sits in terms of purchase intention. In a number of multiple purchase situations, the first title bought was planned while additional titles were not.

- The interviews also suggest four distinct tiers of purchase intention:
- A specific title in mind
 - A sector in mind, but not a specific title in that sector.
 - A magazine purchase in mind, but not a specific title or sector.
 - Not intending to buy or browse at all, but drawn there

One implication of comparing what the tracked shoppers actually did when observed in the qualitative research project and then recalled doing afterwards is that in some cases consumers feel that their magazine shopping is more planned than it actually is. The existence of a strong core of regularly purchased titles in their magazine repertoire can sometimes mask the occasions when they move outside that core without consciously being aware of it (see the next section: “The Magazine Repertoire”).

The Magazine Repertoire

- A large 73% of magazine buyers agree with the statement that “I always buy the same magazine(s).”
- At the same time, 47% of magazine buyers agree with the statement that “I always have a few magazines in mind when deciding which one to buy.”

These two statements are not necessarily contradictory, as is shown in the qualitative project. What this shows is that many consumers appear to have a very settled core of regularly purchased titles which they trust and which they always seek out first on the magazine racks. Some consumers simply buy these “reference titles” immediately, but many will check out what else is currently available first before coming back to their core favourites.

Around this core of regular purchases there is often another pool of titles which are known and recognised, but which are bought less regularly, often after a clear browsing process and usually in addition to the core magazine purchase. It is often the weekly titles which form the core, regular purchase with the monthly titles being more “discretionary”.

“I always buy TV Times and Bella each week. I’ve tried other TV titles but I came back to TV Times because I like it. Bella is just a nice quick read. I’ll also buy Vogue for my daughter when I see that a new issue is out. I sometimes buy Cosmopolitan for myself, but I’d have a look at the cover to see what was in it first to see if there was something that really interested me. It’s a longer read than the weeklies, so I’d have to be sure that I liked it and had enough time to read it before I bought it. Then if something special is coming up, like giving a dinner party or doing some decorating, I may have a look at some of the other titles that cover those areas, but I wouldn’t buy them regularly.” (Female Mills shopper)

The interviews suggest that the core of regularly purchased titles is usually quite small (2-5 titles). The extended repertoire is much larger and a number of interviewees found it difficult to recall these titles when questioned. Some of the titles browsed during the observed shopping were often not mentioned by the respondents in the interviews as being part of their repertoire.

Another insight from the qualitative project is that consumers often have very definite and difficult-to-shift views as to what the attractions and characteristics of their core titles are. Yet they are also very sensitive to subtle shifts in editorial tone and approach through time with a number of respondents stating in the interviews how a particular magazine had changed.

Moving Outside the Repertoire

A significant, but not overwhelming, 52% of magazine buyers agree with the statement that “I like to try new magazines.” This covers both existing titles that are outside the normal repertoire and new launches.

- There is no significant difference between men and women.
- The most adventurous group is the 16-24 years olds with the openness to new titles reducing progressively and quite sharply the older the consumer.
- C1s and C2s are significantly more open to new titles than ABs or DEs.

The interviews give a bit more background to these overall figures. All the respondents, when asked directly, said that they do look at and try new magazines, but most were also quick to point out at the same time that they had a stable and solid core of titles in their normal repertoire. It is also clear from the interviews that browsing is a fundamental part of consumers sampling new titles before buying.

“I will have a look at new ones, but I normally stick to my regular purchases.” (Female Mills shopper)

3.5 THE MAGAZINE RETAILING ENVIRONMENT

One respondent summed up a number of themes that recurred through most of the interviews:

“For me, I just want magazine shopping to be easy and stress-free. That means the magazines I want are easy to find – having titles grouped together is handy.....I like the space to browse without being pressured.....simply having deep enough shelves so that when you put a magazine back it isn’t a struggle....neat and tidy is what it’s all about.....This Tesco meets all these things. I tend to spend longer here than in any other magazine shop. Partly because the big food shop is so boring that I like to look at the magazines first.” (Female Tesco shopper).

Locating the Magazine Racks

All the interviewees were comfortable with finding the magazine area quickly. This was due in part to the fact that most were regular shoppers in those stores and bought magazines in those shops regularly. Yet the location of the magazine racks is also very predictable and fairly standard:

- The Mills shops are small enough to see the magazine display area as soon as one enters the shop.
- The WHSmith magazine displays are also very prominent and tend to be at the front of the store.
- Magazine displays in supermarkets are also expected to be at the store entrance.

The role of magazines in the supermarket shop was a theme running through a number of the interviews:

- *“I put the magazine in my trolley before I do the food shop” (Female Mills shopper)*
- *“I like to look at the magazines before I do the food shop, especially if I’m buying fresh food – I just want to get home with it as quickly as I can. So having the magazines just inside the shop gives you time to browse before you start to get the food.” (Female Tesco shopper)*

Yet two interviewees did suggest that having magazines at or near the tills would be a good idea:

- *“It’s pros and cons isn’t it? It’s quite nice to have a bit of a read before diving into the food shop. But I also think that I’d be more likely to buy a magazine if it was close to the till while you were waiting.” (Female Mills shopper)*
- *“You might be more likely to buy a magazine when you’re waiting at the till. But the trolley would be heavy and full then – a bit of a hassle.” (Female WHSmith shopper)*

Space for Magazines

A significant 35% of magazine buyers feel that there should be more space for magazines in-store. It is clear from the qualitative project that this covers both more **racking** for more full-face displays of titles, but also more space **in front** of the racking to allow better access and less pressured browsing.

- There is no difference between men and women in their desire for more magazine space.
- The youngest age group (16-24) feel this need for more space most strongly, but this drops away the older the respondent until it begins to rise again in the 55+ groups.
- In terms of SEG, the need for more space grows the more upmarket the respondent.

There are some significant differences by store type.

There should be more space for magazines	
Store Type	% Agree
Tesco	22%
WHSmith	44%
Mills	37%
Total	35%

Base: All magazine buyers

- Tesco shoppers are the most relaxed about the currently available magazine space. The qualitative project shows that there are some issues about supermarket aisles (moving trolleys around, getting past trolleys left in front of the racks, avoiding dense traffic areas – *“The racks near the sandwich area are always too crowded so I just don’t go there”*), but generally the wide supermarket aisles are conducive to browsing and magazine shopping. Yet trolleys can suddenly change the available space – *“This Tesco is a bit narrow. You can’t turn your trolley.”*
- WHSmith shoppers are the most demanding of more space. The qualitative project shows that some shelving can be too densely packed to find the titles quickly due to overlapping covers. Also, as this is seen by the consumer as **the** premier outlet for magazine range and magazine browsing, shoppers are also more demanding in terms of wanting the space to browse.
- Mills shoppers are close to the average in terms of their desire for more space.

Magazine Range

Respondents were asked whether they agreed with the following statements:

- “There is always a good choice of magazines.”
- “I would like a bigger range of magazines to be stocked.”

A high 83% of magazine buyers feel that there is already a good choice of magazines:

- Women (+11%) are more likely than men to be impressed by the currently available choice.
- The two youngest groups (16-24 and 25-34) are the most satisfied with current ranges, but satisfaction levels slip down the older the respondent, bottoming out in the 55-64 age group.
- The lower SEGs (C2s and DEs) are the most likely to be impressed.

Yet while 83% of respondents are positive about the current range available, 33% would still like there to be a bigger range:

- Women (+8%) would like to see a bigger range.
- A very high 53% of 16-24s want a bigger range, but this desire starts to drop away very markedly the older the consumer.
- In terms of SEG, the As have the strongest desire for bigger ranges and the DEs the least.

The table below looks at these issues of range by store type.

Store Type	Good Choice	Want Bigger Range
Tesco	86%	19%
WHSmith	94%	43%
Mills	64%	36%
Total	83%	33%

Base: All magazine buyers

It is predictable that **WHSmith** comes out top for offering a good choice of magazines. Yet it also has the highest levels of consumers wanting more. WHSmith clearly attracts the “magazine junkie” who knows that WHSmith offers one of the best magazine ranges available, but who constantly wants more, though this is often in the more obscure and specialist areas as the qualitative project shows.

- *“Smiths is the place to come if you want a really good selection. But that can also make it more difficult to find what you want if you just want one of the bigger, more popular titles.” (Female WHSmith shopper)*

Tesco shoppers are generally satisfied with the current choice and show the least desire for more. The qualitative project shows that some Tesco shoppers can feel overwhelmed by the sheer range at a big WHSmith shop. What they want is a quick purchase of their core, regular magazines (usually the mainstream titles) in a clean and tidy display area. If they need more than that, then they can choose to go to a WHSmith for a more specific requirement.

- *“I stick to bike magazines normally and Tesco normally has a good selection of those. But if I want something more specific then I’ll go to Smiths.” (Male Tesco shopper)*

- *“Tesco is OK on football, but not great on cars.” (Male Tesco shopper)*
- *“Tesco is a general store. You don’t expect too big a range. Smiths has a lot more variety because they specialise in magazines.” (Male Tesco shopper)*
- *“I know that Smiths does have a bigger range, but the supermarkets carry everything I want.” (Female Tesco shopper)*

Satisfaction levels with the current range drop away markedly for **Mills** shoppers who also have a strong desire to see a bigger range. Mills does not appear to be meeting all of its shoppers’ requirements.

In the qualitative project, **local newsagents** were dismissed for having very limited magazine ranges and for not having an environment that is conducive to browsing.

- *“I would only go to the local shop if I was in the area.” (Male WHSmith shopper)*
- *“You can go into your local newsagent and they wouldn’t have half the stuff they have here (Tesco). And not as well laid out either.” (Female Tesco shopper)*
- *“Our local newsagent has got a much smaller selection than here (Tesco) and you feel pressurised to buy rather than browse. In a supermarket you’re buying lots of other stuff so you feel justified in browsing.” (Female Tesco shopper)*

Navigation

A high 76% of magazine buyers agree with the statement that it is “always easy to find the magazine I want”. Yet it is clear from the qualitative project that shoppers find the magazine they want by looking for obvious “anchor” brands on the shelf rather than through any signposting provided by the retailer which is either (1) not noticed at all or (2) is felt to be so broad and generic that it is not much practical help in navigating the shelves.

What is absolutely crucial is that the retailer organises the magazine titles by logical sector groupings. This is generally thought to be done well in the major multiples, but not in smaller, independent newsagents.

“They always group the titles together so I know where the titles I want are.” (Female Mills shopper)

“They always put the same types of magazines together so that it makes them easier to find. Both Sainsbury’s and Mills are the same in how they put them all together. I mean that they put the same types of magazines together in the same kind of way.” (Female Mills shopper)

“I always look for the weeklies first as that is what I always buy. Once I’ve found them and chosen one, I’ll then look at some of the other glossy titles.” (Female Mills shopper)

“It would be great to have all the magazines I want at eye-level so that I could see them more easily, but I know that’s not possible. These lower racks (in a WHSmith outlet) are overlapped by the higher ones so that you really cannot see the titles at the back. There’s too much overlapping to make it easy to find titles.” (Female WHSmith shopper)

“You need more time to find what you want in Smiths because they have so much to choose from and it’s packed together so much. If

you know what you want, then Tesco is quicker and easier.” (Male Tesco shopper)

“They could give better signs about each area (in WHSmith). Like the greetings cards which have very specific sections with dividers on the shelf not just at the top of the shelving....I find what I want by looking for specific titles. For example, it’s obvious where the sports titles are because the covers make it obvious. (Female WHSmith shopper)

In terms of ease of shelf navigation:

- There is little difference between men and women.
- The 65+ age group is the most satisfied and the 45-54 age group the least satisfied with there being little difference between the remaining age groups.
- There is little difference in terms of SEG.

Yet there are some significant differences by store type:

I always find it easy to find the magazine I want	
Store Type	% Agree
Tesco	84%
WHSmith	79%
Mills	59%
Total	76%

Base: All magazine buyers

Tesco shoppers feel happiest with their shelf navigation. This is due in part to careful range editing and wider perceived usage of full-face displays which make finding the anchor brands quicker and easier.

WHSmith has a good score, but the qualitative project underlines the potential for “shelf clutter” in WHSmith outlets.

Shelf clutter emerges as a real issue for **Mills** shoppers.

- *“They’re all a bit mixed up here (in terms of category divisions).” (Female Mills shopper)*
- *“The shelves overlap a lot here. The music titles are set too far back and are difficult to see and to reach.” (Male Mills shopper)*

3.6 AT THE MAGAZINE RACKS

Observed behaviour at the magazine rack

While only a limited number of consumers (21) were tracked at the newsstand in the qualitative part of the project, the importance of browsing was evident, but was also observed to be very diverse.

Observed Shopping Averages	
Total time spent at magazine racks	3mins:4 secs
Number of magazines browsed	4.0
Total magazines eventually purchased	1.4

Time Spent at the Magazine Racks

Across the 21 consumers tracked, the average time spent at the newsstand was just over 3 minutes, but this covered a massive range:

- The quickest magazine shop was 12 seconds: the fast locating of *That's Life* by a 55-64 female in a Mills outlet. Yet even then there was a quick flick through the pages just to establish that this was actually the current issue.
- The longest magazine shop was just under 11 minutes by a 55-64 year old female in a WHSmith outlet. The respondent ranged across a number of sections, browsing *Heritage* and *Living Abroad* as well as a range of women's weeklies: 7 titles in total were picked up off the shelf and flicked through.

Browse times were generally much longer in WHSmith outlets than in either Tesco or Mills outlets.

Titles which were polybagged could only be browsed very quickly – back and front to see what the gift was like and peering through the plastic to try to see as many of the cover lines as possible (see “Polybags” later in this section).

Number of Magazines Browsed & Bought

In three of the 21 observed shopping trips (all Mills shops), no browsing took place at all. The magazine purchases were planned in advance, were part of a regular, weekly magazine purchasing pattern and were quickly executed.

Where magazines were being browsed (usually picked up off the shelf and flicked through), the average number of titles browsed was 4.0 titles per shopper.

In three of the 21 observed shopping trips, no magazines were bought. The reason given was that the interviewees had no time to read at the moment, but that they still wanted to keep up-to-date with what was on the market and that the magazine-browsing was pleasurable in its own right.

For the other 18 observed shopping trips when a magazine was bought, an average 1.4 titles were bought.

The titles browsed and the titles bought by respondent are shown in the table on the next page.....

How Magazines Work at Retail

Detail of Magazines Browsed & Bought

Gender	Age	Shop	Mags Browsed	Mags Bought
F	16-24	Tesco	Your Dog, Dogs Today, Heat, OK	Your Dog
F	16-24	Tesco	Now, More, Pregnancy & Birth, Pregnancy, Shout, Bliss	More, Pregnancy, Shout
F	16-24	WHS	B, Cosmo	-
F	16-24	WHS	Elle Girl, Glamour, Company	Company
F	25-34	WHS	Glamour, Company, New Woman, Red	Glamour
F	35-44	Tesco	Essentials	Essentials, Nursing Times
F	45-54	Tesco	Sugar, Hair Now, Your Hair, Now, TV Choice, What's On TV	What's On TV, Sugar, Your Hair
F	55-64	Mills	-	Best, TV Choice
F	55-64	Mills	-	TV Times, Bella, Readers Digest
F	55-64	Mills	Take a Break, B, More, Heat, New, Star, Now	Now
F	55-64	Mills	Hair, Interiors, Your Home, Bella	New
F	55-64	Mills	-	That's Life
F	55-64	Tesco	Grazia, Full House	-
F	55-64	WHS	Heritage, Living Abroad, Woman, Woman's Own, Woman's Weekly, Take A Break, Chat	Womans Weekly
M	16-24	Mills	NME, Q	NME
M	16-24	Tesco	Boxing News, Shoot, 442, Champions League (x2), Auto Trader	Champions League
M	16-24	WHS	Radio Times, Radio Race Car, Japanese Performance	Japanese Performance
M	25-34	WHS	The Magazine, Soccer Italia, Q, Nuts	Nuts
M	25-34	WHS	Auto Trader, Web Designer, Web User, Computer Active	Web User
M	35-44	Tesco	MCN, Bike, Two Wheels Only, Performance Bike, Superbike, Ride (x2)	Ride
M	55-64	Tesco	You, She	-

On a number of occasions, the titles actually browsed at the magazine racks were outside the repertoire recalled in the post-observation interview.

In addition, the number of repertoire magazines that interviewees could recall spontaneously was small, in the 2-5 range. Yet it was clear from the observed shopping that they were prepared to browse outside their remembered, regular purchase repertoire.

The implication is that consumers might be more adventurous and experimental in their magazine shopping than they think they are and that **consumers believe that their magazine shopping is more planned and structured than it actually is in practice.** Yet what is clear is that magazine shopping is a mix of the habitual and the impulsive and that this mix varies from shop visit to shop visit for the same consumer.

Looking at the mix of titles browsed, there are predictable competitor combinations within a magazine segment, but there is also some cross-segment browsing which is more difficult to predict.

The interviews gave some interesting insights into the thought processes behind the browsing process. They also underlined how impulsive and finely-balanced the final title choice can be. For example:

BROWSED: Essentials

BOUGHT: Essentials & Nursing Times

"I only had Nursing Times in mind. I get it each week as I'm thinking of being a nurse. But I haven't decided yet, which is why I haven't subscribed which I know would be cheaper. I just put Nursing Times straight into the trolley without looking at it. It's always in the same spot on the shelf – I don't know what it's next to. I really don't know why I bought this extra one! Perhaps it was the free chocolate bar!" (Female Tesco shopper)

BROWSED: The Magazine, Soccer Italia, Q & Nuts

BOUGHT: Nuts

"I was tempted by the Bob Dylan feature in Q, but in the end I went for Nuts. I'm just about to go off for a coffee and Nuts is a lighter read and is also discounted. So at that price it's a good deal. I may get Q another day." (Male WHSmith shopper)

BROWSED: MCN, Bike, TWO, Performance Bikes, Superbike, Ride

BOUGHT: Ride

"I normally buy Bike, but it was bagged and that put me off. I had a good look at TWO and Ride. I looked at the features and bike tests and both looked similar. I actually put TWO in the trolley, but then had another look at Ride which I noticed was the May issue rather than TWO's April issue, so I thought that I'd get the most recent issue and swapped over to Ride." (Male Tesco buyer)

Three interviewees actually did not recall correctly which title they had just bought:

- One respondent could not remember at all the name of the magazine bought (*Nuts*), although he seemed generally embarrassed about the whole magazine purchase as the cover photo was fairly explicit!
- One respondent was adamant that she had bought *Heat* ("I just got the one I came in to get") when she had in fact bought *Now*.
- One respondent thought that she had bought *TV Times* (her normal purchase), but had in fact bought *What's On TV*.

All three respondents could accurately recall the covers and cover lines of the titles they had just bought (the *What's On TV* buyer knew that the cover was about Eastenders which is what prompted the purchase of that particular title) showing that it was the cover-browsing which dominated their title choice, even though they thought that they were buying within their normal repertoire.

The Role of Browsing

The importance of browsing in magazine buying is seen from the exit survey in the fact that 44% of magazine buyers claim to spend "a lot of time" browsing before buying.

I spend a lot of time browsing magazines at the newsstand before buying	
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TOTAL MAG BUYERS	43%
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Gender	Male	39%
	Female	46%

Age	16-24	66%
	25-34	52%
	35-44	42%
	45-54	35%
	55-64	35%
	65+	23%

Socio Economic Group	AB	33%
	C1	44%
	C2	55%
	DE	43%

Store Type	Tesco	27%
	WHSmith	51%
	Mills	50%

Base: All magazine buyers

- Women claim to browse more than men – a surprising variation from the common perception.
- The youngest age groups are the biggest browsers and this drops away progressively the older the shopper.
- In terms of SEG, the mid-market form the biggest browsers.
- In terms of shop type, Tesco shoppers are significantly less likely to browse than WHSmith or Mills shoppers – probably a reflection of the sales of weekly titles through Tesco.

The Nature of Browsing

The observed shopping shows four distinct levels of browsing:

1. Scanning
2. On-shelf browsing
3. Pick-up browsing (skim)
4. Pick-up browsing (purposeful)

1. Scanning.

Here the eye passes quickly over the shelves without any noticeable lingering on specific titles. The interviews show that much of this scanning is simply where consumers are locating their core repertoire titles on the shelf and quickly assessing whether they have bought that issue or not already. Yet during this process quite a bit of information can also be absorbed: e.g. major cover lines, the identity of the cover model (particularly important in the celebrity sector), the make of car on a car magazine, etc.

2. On-shelf browsing.

Here the magazine is touched on the shelf, normally to reveal the full cover when the magazines are overlapping (this happened more in the Mills outlets than in WHSmith or Tesco stores due to the number of overlapping magazines). The cover photos and cover lines are being assessed.

3. Pick-up browsing (skim).

Here the magazine is picked up off the shelf. Cover lines are read and the magazine itself is often quickly flicked through (normally from back to front) to get a sense of what is in this issue. Consumers will stop at particular features and spreads that catch their eye. Polybags reduce the amount of time that consumers are able to assess their potential purchase (see "Polybags" below).

4. Pick-up browsing (purposeful).

Here particular cover line(s) trigger a more purposeful review of what is in the issue, searching for specific articles to skim through.

"I don't browse for the sake of browsing. I know what magazine I want. It's only if I have a special reason that I'll look at other magazines. Today I didn't notice anything else. I knew what I wanted and I just went straight to it." (Female Mills shopper)

"I don't normally spend very long browsing, but I had more time today, so I did.....I always have a look first at the magazines I know and normally buy. Then I might have a look at some other magazines with free gifts to see what they're like. Then, if I have time, I may just have a general look around to see what's out there at the moment." (Female WHSmith shopper)

"I tend to spend more time at the beginning of the month browsing because that's when all the titles I'm interested in (cars and bikes) come out – the first Wednesday of each month." (Male Tesco shopper)

"It's an everyday purchase. It's not a treat. It's not that planned. Magazines aren't in the window so I come in to have a look and to see what's out there at the moment." (Male Mills shopper)

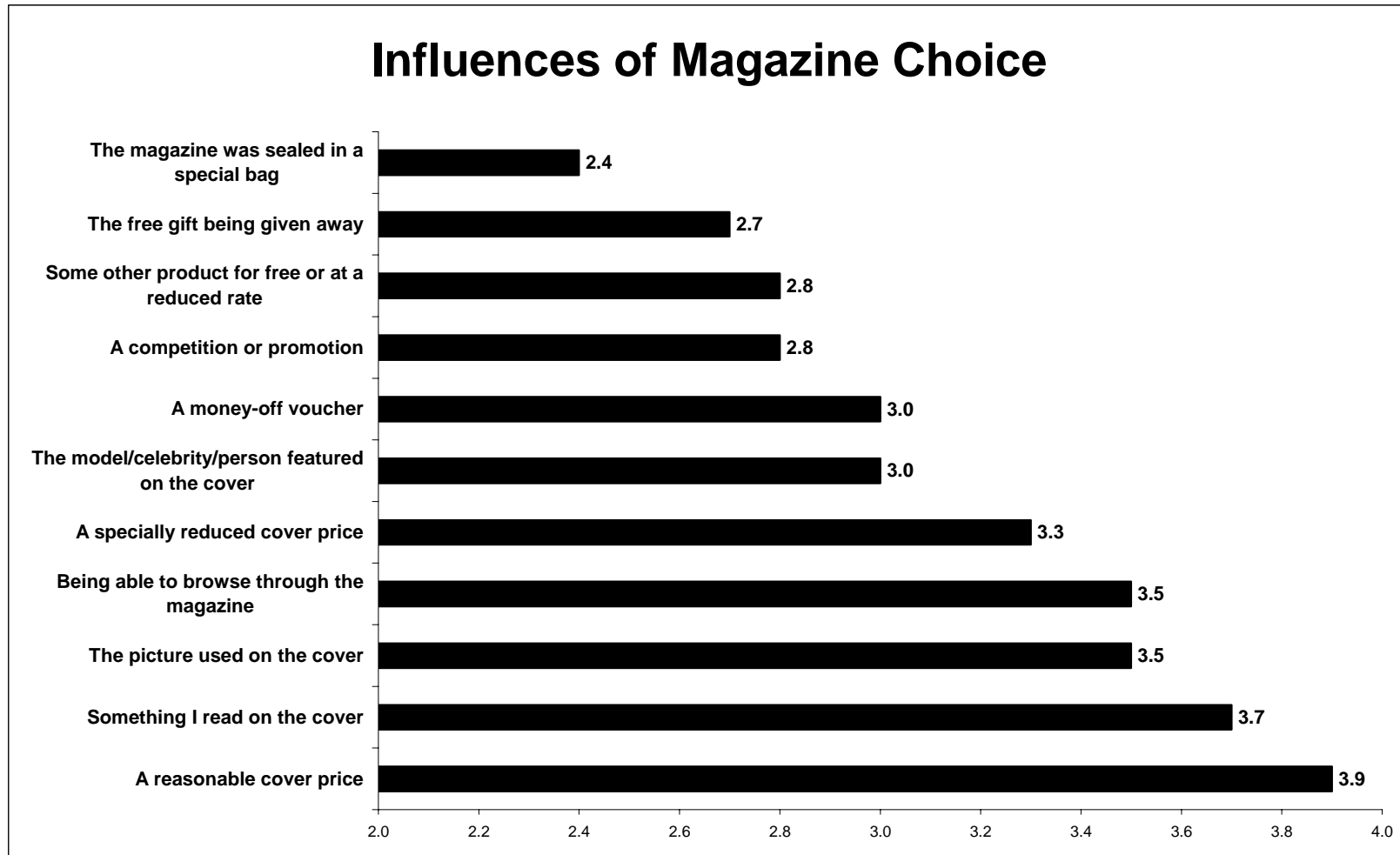
"I look for a magazine I know.....Then I look at the contents page. I then look for a feature that's caught my eye from the contents page....Once I've done that then I'll have a look around some of the other (computer) magazines. If I've got time, I'll also have a look at the car magazines." (Male WHSmith shopper)

"Your eyes scan the whole area quite quickly. You can take in a lot of information like that. You then pick up a few magazines to flick through.....I'll often browse without buying. I wouldn't want to spend that amount of money every week." (Female Tesco shopper)

"I want to know what I'm getting for my money. I'm interested in some very specific cars. So I always flick through first until I see something I want to read." (Male Tesco shopper)

What Influences Magazine Choice: Overview

In the quantitative exit survey, magazine buyers were asked to grade the importance of a series of factors in terms of influencing their decision to purchase the magazine they had just bought on a scale of very important / quite important / neither / not really important / not at all important. A score was allocated to each answer, producing the following averages below.



What Influences Magazine Choice: COVER PRICE

“A reasonable cover price” emerges from the exit survey as the single most important factor influencing the choice of magazine. Yet as the interviews demonstrate, this is a large and complex area.

As with cover mounts (see below), respondents claim that a price discount might make a difference to their title choice, but that they would definitely not buy a magazine that they did not strongly identify with simply because it was cheaper or price-discounted. Also, if they saw another title which was better suited to them editorially, they would buy that, irrespective of any price difference.

“Yeah. The special offer price made me buy this (Nuts). I’ve bought it a few times before so I know what it’s like. It’s got a good cover too. It should be good. But at this price it’s worth buying just to have a quick read with a coffee later.” (Male WHSmith shopper)

“Price is important because I’m buying a lot of weekly titles and those can quickly mount up.” (Female Mills shopper)

“A cut-price might make me try a magazine I wouldn’t normally buy. But for my regular magazines (cars & bikes), it’s all down to what’s inside that issue. Price is irrelevant then.” (Male Tesco shopper)

“Cutting the price is a good idea. But that’s because I buy so many magazines (3 per week). I should really knock it on the head, but I haven’t got much of a social life.....My late husband always told me I should read more. But I think he meant books not magazines.” (Female WHSmith shopper)

“If the subject matter is interesting then I’d buy it whatever the price. Price doesn’t really matter.” (Male WHSmith shopper)

“I never look at the price” (Female Mills shopper)

“Price isn’t important. I just buy what I want to read.” (Female WHSmith shopper)

“Cutting the price wouldn’t make any difference. I know the magazines I want, so I’d buy them anyway whether they were cheaper or not.” (Female Tesco shopper)

Yet the interviews also showed a recurring concern about the rising price of magazines in general:

“They keep on putting the prices up.” (Female Mills shopper)

“Magazines are fairly expensive for what you’re getting really.” (Female Tesco shopper)

“Discounts definitely attract me. Some magazines are simply too expensive - £4 for Vogue is just too much.....Price is something that you have to think about, because it quickly adds up.” (Female Tesco shopper)

“For most people these days, price is important in everything. Magazines are getting quite expensive, so price-cuts would encourage me to buy.” (Female Tesco shopper)

The broad conclusions seem to be that general magazine cover price inflation can limit the consumer’s overall magazine consumption, but that price differentials between specific titles produce much more complex decisions where:

- Price differentials between core, regularly purchased titles appear to be largely irrelevant.
- Price can stimulate purchase of additional titles in the secondary repertoire.
- Price can stimulate trial of new titles outside the repertoire.

Price clearly appears to be a bigger issue in the weekly magazine sector where significant multi-title purchasing takes place.

What Influences Magazine Choice: COVERS

Cover-related issues come in second and third places in the exit survey as key factors which influence the magazine choice:

- “Something I read on the cover”
- “The picture used on the cover”

The critical importance of the cover is also a central conclusion of the observed shopping. Although the interviewees have a core of known and trusted magazine brands that they regularly buy, they still have very specific interests which they look for when reviewing possible alternatives.

“I didn’t have a particular magazine in mind when I came in. So I had a look at the covers to see what took my fancy.” (Female Mills shopper)

“I’m sick of skinny celebrities so this cover of Heat really put me off buying it, though this is one of my regular magazines.” (Female Mills shopper)

“I always look inside to check it out. Sometimes what looks like a really interesting article in a big headline on the cover turns out to be just a few paragraphs inside. You feel cheated then.” (Female Mills shopper)

“I like value-for-money. I like to see what I’m buying first. I want to see if what interests me is in the magazine. I want to see what I’m paying for.” (Female WHSmith shopper)

“I need to check that what is inside is actually what I want to read. I always check before buying.” (Male Mills shopper)

“Covers are important, but they do all look pretty similar (car and bike titles). But I know the magazines well so I know what to look for when I’m weighing them up.” (Male Tesco shopper)

What Influences Magazine Choice: COVERMOUNTS & GIFTS

The general consensus from the interviews was that gifts were noticed and did have an effect in two respects:

- They attracted attention early on in the browsing process, making shoppers pick up the magazine to have a look at it.
- They could influence the purchase itself if the gift was perceived to be relevant and good value.

Yet it is clear that the interviewees were very cynical and “savvy” when it came to cover mounts, many of which are seen as being cheap and tacky.

“When I was younger, I used to buy teenage magazines with lip-gloss. But not now. I wouldn’t buy a magazine if it wasn’t the kind of magazine I really wanted to read. That’s the most important thing.” (Female Tesco shopper)

“I had a quick look at one of the magazines which had a free umbrella. But it’s going to be one of those rubbishy ones that just blows away! It’s a waste of money buying a magazine just for a rubbishy gift. Unless you actually wanted the magazine itself.” (Female Tesco shopper)

“I know that I’ve just bought a magazine with a free gift (Glamour), but it didn’t make me buy it. I always buy it because it’s a good read, but it’s still good to have the gift though!” (Female WHSmith shopper)

“I normally stick to the same magazines, but a free gift will sometime make me try something else.” (Female WHSmith shopper)

“It all depends what the gift is. I’d rather buy a magazine that I wanted than one which had a free gift.” (Male Mills shopper)

“I generally don’t take much notice of free gifts as most of them really aren’t up to much. Except the music magazines. A free CD,

especially if it has a band I like, would make me buy a magazine that I wouldn't normally." (Male Tesco shopper)

"They're alright. But I still go for what I want to read." (Female WHSmith shopper)

"For computer magazines, what's on the cover disk is really important. That would influence my choice. But normally not with other magazines." (Male WHSmith shopper)

"They're quite good really. I suppose they're saying thanks for buying." (Male WHSmith shopper)

A cover gift can clearly be a powerful incentive when buying for someone else: *"I bought Sugar for my daughter because of the gift. I think that she would really like it (make-up bag)." (Female Tesco shopper)*

What Influences Magazine Choice: POLYBAGS

In the interviews, polybags were universally criticised for hampering browsing, although most respondents understood why the magazines were bagged - to keep the magazines in good condition and to stop pilferage of the free gifts. Some respondents would occasionally break open the bags to be able to browse the magazine.

"They're not good. You can't see inside (the magazine). I'd prefer not to have them, but I suppose that it's not a big issue." (Female WHSmith shopper)

"I understand why they do it. It holds everything together and keeps it all safe and tidy. But it does put me off, because I can't see what's inside the actual magazine." (Female WHSmith shopper)

"I hate all the inserts that fall out, so I suppose a bag keeps everything tidy. But you can't see what's inside if it's in a bag." (Male Mills shopper)

"Bags actually put me off. If I'm really keen to see what's inside a magazine, then I'll open the bag and have a look inside. I don't like buying magazines without looking inside first." (Male Tesco shopper)

"I would never buy a magazine, especially a new one, without being able to flick through it." (Male Tesco shopper)

Interviewees who were buying for other family members were more brand-driven than choosing on the basis of covers and cover lines, so they seemed less concerned about browsing this particular issue: *"I often buy for my daughter. I know what she wants so I just get it. But I think that it (polybagging) would annoy me if I was buying for myself as it covers up what is on the front." (Female Mills shopper)*

What Influences Magazine Choice: RETAILER DISPLAYS

Among the 21 interviewees, only two noticed any of the retailer promotions or special display units (a Mother's Day Two-for-the-Price-of-One in a Mills outlet and Magazine of the Month in a Mills outlet).

Generally, the interviewees seemed so focused on the titles that they wanted to find that anything else was filtered out.

When the special retailer displays were pointed out to the interviewees after their observed shop, they all felt that they were a good idea, but that they would not make them buy a magazine which was outside their normal repertoire.

"Yeah! I saw it, but it wasn't a magazine I was interested in so I just passed by." (Female Mills shopper)

"I know the magazines I want to look at. I know where they are in the shop. I just want to find them quickly." (Male WHSmith shopper)

In one observed shop, it was clear that a special plastic display unit (an in-category parasite unit hanging off the front of the shelf) was actually obscuring the shopper's vision of the lower shelves behind: *"I couldn't find Radio Times to begin with. It was on a lower shelf tucked away behind another magazine." (Female Mills shopper)*

One interviewee suggested that retailer in-store activity should concentrate on highlighting launches: *"Having a promotions board listing all the new magazines that have come out would catch your attention." (Female Tesco shopper)*

What Influences Magazine Choice: BY GENDER PROFILE

There are not massive differences between what drives men and women in their magazine choices.

INDEX: Average across all respondents = 100			
Category	Purchase Factor	Male	Female
COVER	Something I read on the cover	97	103
COVER	The picture used on the cover	94	103
COVER	The model/celebrity/person featured on the cover	87	110
PRICE	A reasonable cover price	97	105
PRICE	A specially reduced cover price	94	106
PRICE	A money-off voucher	90	107
PROMOTION	The free gift being given away	93	107
PROMOTION	A competition or promotion	89	107
PROMOTION	Some other product for free or at a reduced rate	100	107
POLYBAG	The magazine was sealed in a special bag	96	100
BROWSING	Being able to browse through the magazine	97	100

Black cells = 90 and under / Grey cells = 110+

- The person featured on the cover is much more important to women, reflecting the importance of the female-biased celebrity sector.
- Men are less likely to be influenced by money-off vouchers and competitions & promotions.

The following pages profile magazine choice by:

- Age
- Socio economic group (SEG)
- Store type

What Influences Magazine Choice: BY AGE PROFILE

The youngest and the oldest age groups are the most polarised in the strength of the various purchase influences.

INDEX: Average across all respondents = 100							
Category	Purchase Factor	16-24	25-34	35-44	45-54	55-64	65+
COVER	Something I read on the cover	105	105	103	100	103	89
COVER	The picture used on the cover	111	100	97	106	94	89
COVER	The model/celebrity/person featured on the cover	117	103	100	97	87	90
PRICE	A reasonable cover price	97	103	100	97	97	113
PRICE	A specially reduced cover price	100	100	94	100	100	109
PRICE	A money-off voucher	103	93	90	97	97	110
PROMOTION	The free gift being given away	107	107	96	107	89	81
PROMOTION	A competition or promotion	107	100	96	100	89	107
PROMOTION	Some other product for free or at a reduced rate	111	100	96	104	89	111
POLYBAG	The magazine was sealed in a special bag	108	104	96	100	100	83
BROWSING	Being able to browse through the magazine	103	109	97	100	94	86

Black cells = 90 and under / Grey cells = 110+

What Influences Magazine Choice: BY SEG PROFILE

There is little difference between the main socio economic groups.

INDEX: Average across all respondents = 100					
Category	Purchase Factor	AB	C1	C2	DE
COVER	Something I read on the cover	105	103	105	92
COVER	The picture used on the cover	97	106	103	91
COVER	The model/celebrity/person featured on the cover	97	103	97	100
PRICE	A reasonable cover price	103	100	103	103
PRICE	A specially reduced cover price	106	94	103	97
PRICE	A money-off voucher	100	97	100	103
PROMOTION	The free gift being given away	96	104	104	93
PROMOTION	A competition or promotion	100	100	104	96
PROMOTION	Some other product for free or at a reduced rate	104	100	96	104
POLYBAG	The magazine was sealed in a special bag	92	100	104	96
BROWSING	Being able to browse through the magazine	94	106	100	91

Black cells = 90 and under / Grey cells = 110+

What Influences Magazine Choice: BY STORE TYPE

Tesco is the only store type which shows significant variances from the average.

Tesco shoppers are more price-driven than average.

They are less motivated than average in terms of:

- Cover models
- Free gifts
- Competitions or promotions
- Polybags
- Being able to browse

INDEX: Average across all respondents = 100				
Category	Purchase Factor	Tesco	WHSmith	Mills
COVER	Something I read on the cover	97	103	103
COVER	The picture used on the cover	91	106	100
COVER	The model/celebrity/person featured on the cover	90	103	100
PRICE	A reasonable cover price	110	97	97
PRICE	A specially reduced cover price	97	100	103
PRICE	A money-off voucher	93	103	100
PROMOTION	The free gift being given away	89	104	107
PROMOTION	A competition or promotion	89	104	100
PROMOTION	Some other product for free or at a reduced rate	93	107	104
POLYBAG	The magazine was sealed in a special bag	79	104	108
BROWSING	Being able to browse through the magazine	89	103	106

Black cells = 90 and under / Grey cells = 110+

About Wessenden Marketing

Wessenden Marketing is a broad based marketing consultancy with a range of clients across the media, distribution, retailing, direct marketing, finance and business service sectors.

Wessenden's services cover four key areas:

- **Consultancy.** Health checks, market mapping & consultancy and project management.
- **Publishing.** Newsletters and reports analysing trends in the media business. "Circulation Briefing" is the key newsletter published 10 times per year.
- **Research.** From desk research through reader questionnaires on to in-store shopper surveys.
- **Training.** Public seminars and in-house workshops on a range of marketing and circulation related topics.

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About Other Lines of Enquiry

Other Lines of Enquiry helps senior decision makers in the media industry develop content, branding and ad-sales strategy. We use cutting edge consumer insight and media research to help the biggest brands in UK media to satisfy - and often anticipate - the demands of audiences and advertisers.

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