

## ASPECTS OF ASCERTAINING SPECIAL INTEREST TITLES IN MEDIA AND MARKET ANALYSES

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### Abstract

The tremendous increase in the number of special-interest titles is reflected in the steadily growing number of titles that are being investigated in market and media analyses. Based on the example of the Allensbach Media Market Analysis (AWA), this paper will focus on four different aspects involved in ascertaining special-interest titles:

- The growing number of titles leads to a reduction in coverage levels, which we have countered by modifying the question model.
  - When designing and grouping masthead cards, it is imperative that the great danger of confusion between titles be taken into consideration.
  - In the case of SI titles with smaller circulations, the findings are not reported on the basis of average-issue readership (A.I.R.) due to the small subsample; instead, they are based on audiences reached by multiple advertising inclusions.
  - The AWA '92 includes qualitative criteria. For the SI titles as a group, however, this does not entail any marked improvement in their relative position.
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### Introduction

All it takes is a quick glance at the magazine rack of any well-stocked newsstand to see that Germany is the land of magazines. Nowhere else will you find a comparably large selection of publications and nowhere else do magazines exert such a decisive influence on the media landscape. One striking aspect is the sizable share of special-interest titles; in the past few years, the development of the magazine market has been determined by this sector of the magazine trade. SI titles are characterized by a clearly recognizable editorial emphasis that is tailored to the readers' personal leisure-time interests and informational needs.

With regard to advertising turnover, magazines were in first place in the German advertising market until 1991. This situation remained unchanged until the TV boom of 1992, when advertising budgets were shifted primarily in favor of private television stations, making 1992 the first year in which more advertising funds were allocated for television advertising (6.3 billion DM) than for magazine advertising (6.0 billion DM). Most deeply effected by this development were the general magazine publications. This is one reason for the trend towards increasingly specialized magazine concepts, for in comparison to TV competitors, SI titles are in a position to address smaller target groups without dispersion losses.

### Increased Number of Titles

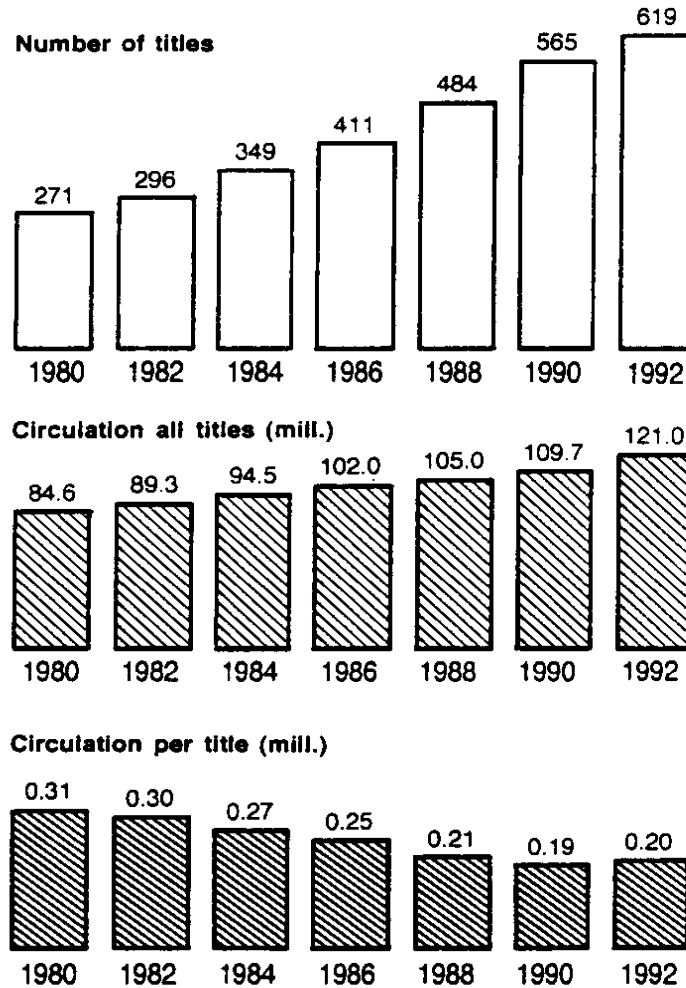
Figure 1 shows the trend concerning the number of titles, total circulation and circulation per title during the time period between 1980 and 1992: Of the markedly increased number of titles, which grew particularly rapidly in the mid-1980's, there is a disproportionately large share of special-interest titles. In comparison to the increase in the number of titles, circulation figures have certainly grown, but the growth has been considerably slower. Accordingly, average circulation per title has decreased over the past 10 years from 300,000 to 200,000. Readers are becoming increasingly selective with regard to the purchase and use of magazines.

**Magazines**

Figure 1

**Number of titles and circulation**

(Controlled circulation (IVW), 4th quarter)



Source: IVW (1992 onwards, East and West Germany)

In media planning, special-interest titles have attained a firm position in the media mix. In clearly defined markets, target groups can be reached precisely and without any significant dispersion effect. SI titles allow media planners to effectively offset qualitative and quantitative deficits in media planning. To this end, however, media planners need comparative data on a steadily growing selection of titles.

This need is fulfilled by market and media analyses. The number of titles included in the Allensbach Media Market Analysis (AWA) has almost doubled in the past decade; here too, the share of SI titles shows above-average growth. The AWA '92 provides information on 105 individually ascertained SI titles, which is two and a half times more than 10 years ago. In addition, the AWA '92 includes a further 23 titles which are reported on solely within the context of combination rates. The Allensbach Media Market Analysis is thus especially attuned to the media planners' need for a comprehensive foundation for their work.

**Table 1****Magazines Ascertained in the Allensbach Media Market Analysis (AWA)**

Number of magazines ascertained	AWA '82	AWA '87	AWA '92*	Change 1982 - 1992
Total	105	147	202	+ 92%
Special-interest titles	42	71	105	+ 150%

\*In comparison, the MA '92 ascertains 126 magazines, of which 42 are special-interest titles.

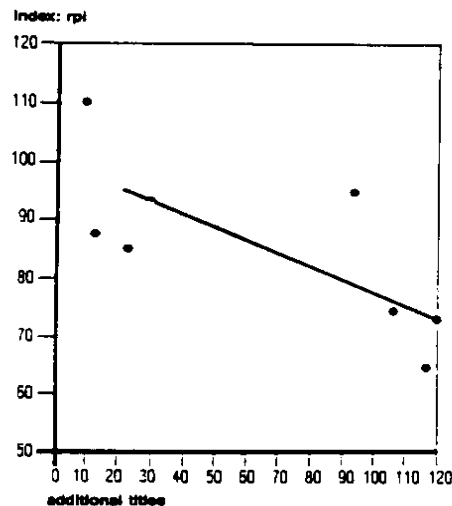
**Number of Titles and Level of Coverage**

The increased number of titles ascertained changes the coverage of all titles measured, a relationship which was empirically demonstrated and quantified in the early 1980's. As a rule of thumb, it can be said that when an initial total of about 80-100 titles is increased by an additional 40 to 50 titles, coverage decreases by approximately 10% (Tennstädt, 1983).

By 1988, the number of titles had already increased substantially and it was foreseeable that even more titles would follow in the years to come. Faced with the resultant drop in coverage figures, we decided to alter the question model.

**Figure 2**

**Coverage Figures (rpi) Depend on the Number of Titles Ascertained**  
40 to 50 additional titles reduce coverage by about 10 percent



Source: Allensbach Archives 1981/82, 1991 Surveys 4015/4017, 4686, 4683 and 4007/4008, Population 18 to 59

### Modification of the Question Model

In the Allensbach Media Market Analysis, as in all other German media analyses, average-issue readership, or A.I.R., is determined by means of a recency question, which is preceded by a frequency question. In order that the different variations of this basic model of coverage ascertainment may be described in greater detail, one variable is particularly important: the number of categories that qualify for rpi in proportion to those categories that do not qualify for rpi. The decisive influence of this ratio on coverage figures has already been proven and quantified: If this ratio is improved by 10 percent in favor of the qualifying categories, a (relative) increase in coverage of approximately 20-30 percent is to be expected.

In 1988, we eliminated the fourth category of the recency question (see Figure 3), thus changing the ratio of rpi-qualifying categories to non-qualifying categories as follows:

- Before modification: 2 qualifying categories to 5 non-qualifying categories;
- After modification: 2 qualifying categories to 4 non-qualifying categories.

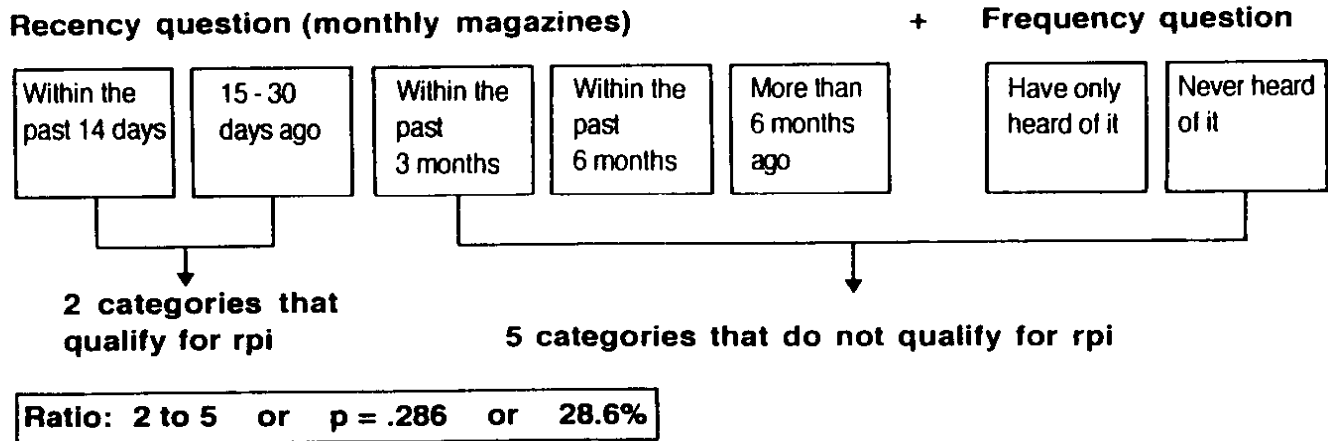
This means a probability change of approximately 5% in favor of the rpi-qualifying categories.

In this connection, there was a 13% increase in gross coverage with respect to a total of 188 titles ascertained immediately before and after the modification.

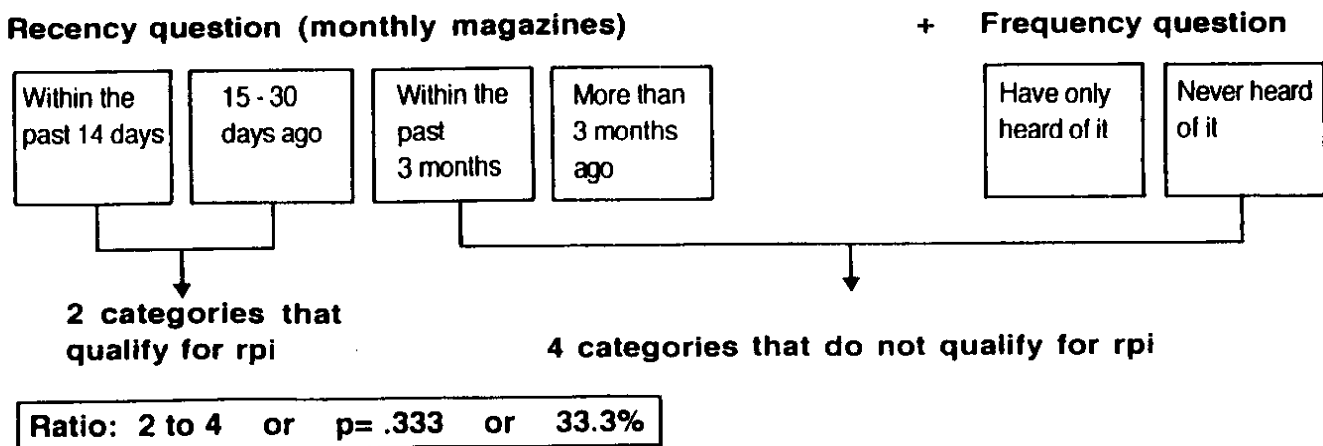
Figure 3

### Modification of the Question Model

#### I. Starting situation



#### II. Modified question model



One crucial point is that this modification does not affect the relations between the titles ascertained, which can be demonstrated based on the titles' relative share of gross coverage before and after modification (Table 2).

**Table 2**

Stable Relations Share of gross coverage		Before modification (2 to 5) %	After modification (2 to 4) %
4	Illustrated news magazines	10.2	11.0
1	<u>Bild am Sonntag</u>	5.1	4.9
9	TV/radio magazines	19.0	18.8
12	Weekly women's magazines	13.8	13.3
4	Biweekly women's magazines	6.7	7.0
14	Monthly women's magazines	9.8	10.3
5	Magazines for young people	2.2	2.3
2	Sports magazines	1.2	1.2
10	Automotive magazines	9.1	8.5
3	Men's magazines	1.9	2.0
4	Hobby magazines	1.8	1.6
4	Home and garden magazines	4.8	4.8
9	Magazines on special topics	5.7	5.7
5	Magazines on social, political and economic topics	6.8	6.6
2	Weekly newspapers on social, political and economic topics	1.9	2.0

SOURCE: Allensbach Archives, IfD Surveys 4090, 4095, 5002 (1987, 1988)

The possibility that altering the question model could have any significant effect on the relations between the individual (groups of) titles can thus be ruled out. But by modifying the question model, it was possible to neutralize the decreased coverage levels caused by the inclusion of additional SI titles.

Nevertheless, even with this modified question model, it is still not possible to increase the number of titles indefinitely. One way to determine the upper limit is to compare the findings with those from studies based on a restrictive question model (for example, the AG.MA with its 1 to 7 ratio). The upper limit would appear to be reached if the figures obtained for an increasing number of titles are less than the coverage levels ascertained using the restrictive model.

### Split According to Titles?

At present, there is some discussion among other German media researchers as to whether titles should be split in order to reduce the number of titles ascertained in a particular survey. Titles ascertained in two separate surveys could then be fused together into one common set of data. The AG.MA has been using a similar procedure for several years now to ascertain television usage; the information concerning television usage, which is measured by technical means, is fused with the data on magazine usage. A corresponding extension of this method to the usage of SI titles, however, would entail additional problems.

The use of special-interest titles is highly selective. In the case of SI titles, media planning is not limited to the definition of target groups by means of socio-demographic characteristics. One typical feature is the use of a variety of characteristics, which range from psychographic variables (for example, strength of personality) to areas of interest and leisure-time activities.

There is some doubt as to whether the specific connections between these variables and the use of SI titles can be correctly reflected by means of fusion. Such a fusion would have to consider a great number of common characteristics, and it is uncertain whether it is possible to arrive at a selection of criteria that would lead to satisfactory results for all special-interest titles.

Even if it were possible to obtain satisfactory results by means of fusion, other additional problems would still remain. Truly comparative findings can only be obtained if all methodological details are comparable in both surveys. There are plenty of examples which show that even small deviations lead to different coverage levels. Especially important in this respect are the length and composition of the title selection, along with the grouping of the individual titles in the two parts of the study.

For these reasons, one of the great advantages of the Allensbach Media Market Analysis would seem to us to be the high level of data security afforded by its adherence to the single-source approach.

### **Masthead Cards as Recall Aids**

In the Allensbach Media Market Analysis, title identification is facilitated by the use of individual masthead cards on which the title signet of a publication is reproduced in black and white. Groups of cards are presented to the respondents; in the 1992 AWA, 19 groups comprising 8 to 22 titles per group were formed.

The groups are generally formed according to the following three criteria:

- **Thematic similarity:**

All thematically similar titles are assigned to a group regardless of publication interval. For example, all publications dealing with travel, computer or automotive topics are combined in one group. This serves to make respondents aware of the diverse selection in these segments and thus helps them to recall the particular magazine in question.

- **Possible confusion due to similarity in titles:**

In most cases, magazines with the same or similar titles are assigned to one group due to thematic similarity. But there are also cases in which important components of the titles' signets are similar, even though they focus on different thematic areas (see Figure 4). In order to make respondents aware of the possibility of confusion, such titles are assigned to one group without regard to topic.

FIGURE 4

### Interchangeable Names

Titles in one group despite different thematic emphasis

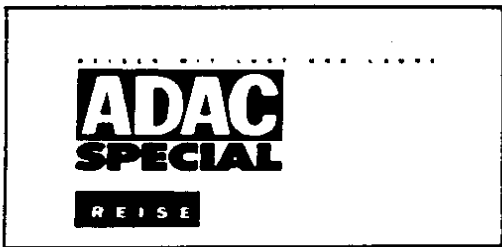


Special interest title on the topic of travel

together with

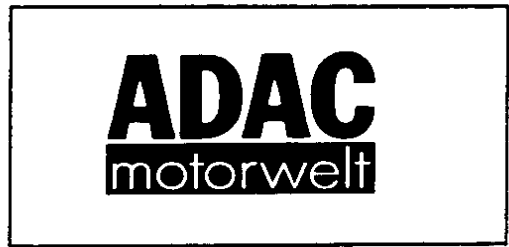


Special interest title on the topic of bicycling



Special interest title on the topic of travel

together with



Magazine for members of an automobile club



Men's magazine

together with



Women's magazine

- **No title should stand alone:**

Large media studies with an extensive selection of titles often involve all important competitors in a particular market segment. The respondent is thus shown most or all titles in this segment so that he or she is in a better position to identify the magazine that he or she actually uses. For reasons of media fairness, this practice must also be applied in the area of SI titles. If, for example, three different titles dealing with golf are competing for the favor of golfing enthusiasts, all three of these titles should be ascertained. The effect of not ascertaining competing titles is shown in the three examples included in Table 3.

**Table 3**

Ascertaining a Title Alone Leads to Higher Coverage Figures

	Coverage (rpi)	
	Only title ascertained in this segment	Ascertained along with other titles (number) in this segment
	%	%
SI title on hunting--Jäger	0.7	0.4 (3)
SI title on health--Goldene Gesundheit	0.8	0.5 (2)
Puzzle magazine -- Extra Rätsel	3.0	2.0 (2)

SOURCE: Jäger: AWA '85 and '86; Goldene Gesundheit: AWA '87 and '86, Extra Rätsel AWA '86 and '87

**Smaller Subsample for Titles with Low Circulation**

A typical characteristic of many special interest titles is a relatively low circulation level (frequently less than 100,000, often even less than 50,000 copies) and, in conjunction with this, a low readership level. The result is a small subsample within the main sample and, accordingly, a greater sampling error. For example, if a sample comprises approximately 20,000 cases--as is the case with the Allensbach Media Market Analysis--the structural evaluation for very small titles may be made based on as few as 50 rpi-cases.

Even when specifications with regard to the level of tolerable sampling error are reduced, the sample still remains too small for reporting purposes. For practical reasons, enlarging the sample also does not represent a real solution. In order to reduce the sampling error by 50 percent, it would be necessary to base the study on a sample four times as large.

It would thus seem reasonable to evaluate the media performance of the title based on a more broadly defined group of users, rather than on the basis of average-issue readership. This group may include the broadest possible audience or audiences reached by means of multiple advertising. Our analyses show that a comparative coverage evaluation based on 3, 6 or more inclusions leads to findings that are similar to evaluations based on A.I.R. figures. For example, the 10 computer magazines listed in Table 4 show that the rankings according to coverage (net) are, at least among the top-ranking titles, the same on all levels. Ranking series based on 6 inclusions, for example, also correspond to media planning practices in the case of SI titles.



**Table 4: Coverage of 10 Computer Magazines (AWA '92 - West)**

Target group: Men 14 and over, very interested in computer use,  
application of computers

	Ranking of 10 computer titles according to coverage				
	A.I.R. for ..... inclusions				
	(1x)	3x	6x	9x	12x
Chip	1	1	1	1	1
DOS International	2	2	2	2	2
Amiga	3	3	3	3	3
Personal Computer	4	4	5	5	5
64'er Magazin	4	5	4	4	4
Powerplay	6	6	7	7	7
c't Magazin	7	7	8	9	9
Computer live	8	10	10	10	10
Computer persönlich	9	9	9	8	8
PC Magazin	10	8	6	6	6

SOURCE: AWA '92 - West

This also holds true for readership structures. A title's characteristic readership profile, based on structural criteria, remains the same even after 6 inclusions, as illustrated in Table 5 by the example of an special-interest title on the topic of yachting.

**Table 5**

**Stable Readership Structures  
A.I.R. vs. Multiple Advertising**

SI title on the topic, "Yachting"  
Target group: Men 14 and over

Selected structural criteria	Readership Structure				Broadest readership group %
	A.I.R. after ..... inclusions				
	(1x) %	3x %	6x %	12x %	
<b>Age</b>					
14 - 39 years old	51	52	52	52	52
40 - 59 years old	38	37	36	36	36
60 and over	10	11	12	12	12
<b>Household income</b>					
5,000 DM and over	35	38	39	40	42
<b>Discretionary income/mo.</b>					
1,000 DM and over	28	29	30	30	31
<b>In free time, frequently or occasionally go -</b>					
Sailing	55	53	51	49	47
Motor-boating	37	38	38	37	35
Surfing	19	19	19	19	19
<b>Especially interested in -</b>					
Financial/capital investments	53	52	51	50	49
Vacation	59	58	58	57	57
Airplanes, flying	19	20	20	19	18
Target group insurance	53	51	50	49	48
Technically advanced persons	37	38	39	39	41
Ultra consumers	28	26	25	24	23

SOURCE: Allensbach Media Market Analysis (AWA '92 - West)

### Qualitative Criteria

For many years, the Allensbach Media Market Analysis has included qualitative criteria for all titles. Two criteria that have proven to be especially suitable with regard to both significance and economic aspects are the amount read and identification with the magazine (for more information on how these criteria are ascertained, see Hansen, 1988). Until now, these figures have primarily served as structural data on the readership in question--particularly in the case of SI titles.

In extension of this, media planners will find two new contact definitions--and the corresponding p-values--in the 1992 AWA:

- "Average-page readership" (A.P.R.), which is based on specific information concerning the amount read per individual title;

- The second definition, which is based on average-issue readership but which also considers identification with the publication, can be termed "A.I.R.-Q". (Q = qualified), in other words qualified average-issue readership. The A.I.R.-Q value represents the share of the average-issue readership that shows above-average identification with the title.

An initial analysis shows that the transition to readers per page entails slight overall coverage losses for SI titles as a group; At A.P.R.-level, the SI titles' share in the gross coverage for all titles is somewhat lower than at the A.I.R.-level. The opposite is true in the case of A.I.R.-Q: When identification with the title is considered in addition to average-issue readership, the SI titles find themselves in a slightly improved position in comparison to the general interest titles (see Table 6).

**Table 6**

Coverage Using Various Contact Definitions

	Share of gross coverage		
	A.I.R. %	A.P.R. %	A.I.R.-Q %
All titles (189)	100.00	100.00	100.00
All SI titles (99)	27.19	26.64	28.13
Selected SI titles according to topic area			
Gardening (3)	1.77	1.80	2.07
Sports (general) (2)	1.64	1.73	1.97
Parenting (2)	1.10	1.12	1.28
Building/House & home (11)	3.45	3.16	3.01
Cinema/Video (6)	1.06	1.04	1.03

SOURCE: Allensbach Media Market Analysis 1992 - West

An analysis of the individual special-interest titles or smaller groups of titles shows the extent of the contribution which A.P.R. and A.I.R.-Q make towards a differentiated evaluation of media performance. For example, titles on the topics of gardening, sports (general) or parenting are able to improve their relative positions, while building/house & home magazines or cinema/video titles find themselves in a worsened position.

Only the future will tell what role these new qualitative criteria will play in concrete media planning, particularly with regard to special target groups.

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