

# CHANGING MAGAZINE USE: ANALYSED ON THE BASIS OF AN ANNUAL MEDIA AND MARKET STUDY

**Dr. Johannes Schneller, Institut für Demoskopie Allensbach**

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## Abstract

This paper analyzes changes in magazine consumption in Germany over the past 10 years, based on the indicators of reading frequency and amount read. The findings stem from the annual *Allensbach Media Market Analysis*, which enables us to complete trend analyses without any major limitations due to the consistent methodology used to ascertain the data.

The findings reveal the following shifts in magazine consumption patterns:

- Despite the expansion of the magazine spectrum available, the population's magazine horizon—defined as the average number of titles read at least very seldom—has narrowed;
- The number of regular readers among readers per issue declined among all magazines on average and in most magazine segments;
- Initially, a decrease in the amount read was observed until 1991/1992. After 1992, a slight, yet continual increase was noted.

## Background

The media and advertising market has changed drastically in Germany since the mid eighties. In all media genres changes can be observed with regard to:

- the extent and content of media offerings,
- their significance as an advertising medium, and
- the behavior of media users.

Due to the competitive relations among the different media sectors, it is almost impossible to consider individual areas in isolation. The television sector is especially important because of the intensive interaction with the print media. Since the mid-eighties, the development in Germany has been characterized by a massive expansion of television offerings, particularly due to the emergence of private television stations. The introduction of private television has resulted in an almost unlimited supply of commercial time. Between 1986 and 1996, the number of commercials broadcast by the larger television stations increased by more than eighteenfold.<sup>1</sup> The television stations' advertising income increased from about 1.5 billion DM in 1986 to approximately 6.9 billion DM in 1996. The three consumer magazines which were still ranked distinctly above commercial television in 1986 have been clearly overtaken in the meantime (Table 1).

Parallel to the expansion of the television offerings, there was also an increase in television consumption. In the meantime, one out of two Germans age 14 and over (48 percent) watches television for three hours or more on a normal workday. In 1989, only one out of three Germans were classified as intensive viewers (Table 2). Television consumption has increased to an above-average degree among younger viewers. The composition of television viewers is changing, it is getting younger. The tendency for individual television stations to focus on specific target groups has now also triggered a development in television which was initially evident in the magazine market.

The development of consumer magazines over the past decade has been marked by the continuing differentiation of the spectrum of magazines offered. From 1987 to 1997, the number of consumer magazines increased by more than 300 titles to a total of 765 magazines (an increase of 80 percent). The circulation of all titles rose much more slowly (32 percent), thus causing the average circulation per title to decrease to less than 200,000 copies in the meantime.

Over the past decade consumer magazines were able to increase their net advertising income by 25 percent, despite the enormous competition posed by commercial television. This partial success can be attributed to the magazines' consistent orientation towards specific target groups. Magazines were not, however, able to defend their relative position among the classic

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<sup>1</sup> In 1986, the public television stations and two private stations broadcast a total of 52,546 commercials comprising an overall length of approximately 400 hours. In 1996, a total of 960,684 commercials comprising an overall length of approximately 6,500 hours were broadcast by the public television stations and 6 major private stations. (Source: ZAW, Zentralausschuß der Werbewirtschaft e.V.)

media. In the period from 1986 to 1996, magazines had to relinquish second place—behind newspapers—to television. During this time, the magazines' share of total advertising income declined from 20.3 percent to 12.9 percent.

### Suitability of Market and Media Studies for Analyzing Change (in Magazine Consumption)

The following analysis is based on the *Allensbach Media Market Analysis (AWA)*, an annual study ascertaining information on the media—i.e. magazines, newspapers, television, radio, cinema—and target groups. The AWA, which is based on about 20,000 interviews per year, offers a comparatively complete picture of Germany's magazine landscape. In conjunction with the increasingly differentiated spectrum of magazines offered, the number of titles ascertained by the AWA has also increased substantially over the past decade, whereby the main period of growth occurred between 1987 and 1992. During the following five years until 1997, the rate of title growth dropped off considerably. The increase in the number of titles over the past decade can primarily be attributed to the introduction of numerous smaller titles, whose coverage of the population age 14 and over lies at less than 1 percent (Table 4).

Trend analyses completed over longer periods of time are especially important here, since they can detect trends which take place gradually. Media market studies primarily serve, however, to compare advertising media and target groups at a particular point in time. Given the sensitivity of our measuring instruments, the question arises of whether trend analyses can in fact be completed based on the constellation at hand. In our view, the most important prerequisite for trend analyses is for the magazines to be ascertained consistently. This applies not only to the wording of individual question and response categories, the design of prompt aids, lists and sheets on which the cards are to be sorted, but also the order of the questions and asking of any additional questions. The question model employed by the AWA to ascertain magazine usage has remained practically unchanged from 1987 to 1997. Yet even when the question model is identical, certain effects stemming from the number of titles ascertained or the rest of the questionnaire are conceivable. We know that the number of titles ascertained has an influence on coverage levels (Tennstädt, 1983). Yet we are not familiar with any studies that examine the influence of the number of titles ascertained on readership composition. The same applies to those effects which may originate from the share of target group questions in the questionnaire. We would thus suggest that, in addition to ascertaining the length of the interview, further indicators of the strain on respondents and interviewers should be also be determined and observed over time. The indicators used in the *Allensbach Media Market Analysis* to measure interview atmosphere have remained practically unaltered from 1987 to 1997 (Table 5). We can thus exclude systematic effects on the readership data which arise from changing degrees of interview strain, with great certainty.

### Survey Data - Aggregation -Analytical Methods

The AWA determines user behavior at the level of individual magazines. For each title it ascertains:

- the broadest readership groups: i.e. respondents who at least read the title very seldom, as opposed to respondents who are only familiar with it by name, or are not familiar with it at all;
- readers per issue ascertained via the recency of reading;
- reading frequency: 5-step verbal scale (appendix 1);
- amount read: 5 -step verbal scale (appendix 1).

By combining two key variables of magazine usage, i.e. reading frequency and the amount read, we obtain a valid readership typology:

Type of reader	Reading frequency	Amount read
HEAVY READER Often and intensively	Regularly, rather often	Three-quarters of all pages or more
SCANNER Often but selectively	Regularly, rather often	Half of all pages or less
SPORADIC READER Seldom but intensively	Every now and then, seldom	Three-quarters of all pages or more
APATHETIC READER Seldom and selectively	Every now and then, seldom	Half of all pages or less

The data obtained for the individual magazines represent such an abundance of details that they tend to obscure the view of the general developments rather than promote it. For analytical purposes, the data ascertained for several titles (for example, all titles in one magazine segment) can be aggregated, thus revealing stable trends which are unaffected by special short-term developments for individual titles.

Another approach is to create a new variable from the existing data. For example, the "magazine horizon" indicates the number of titles a respondent has read. Suitable recoding allows us to describe groups of people who have broad, as well as narrow magazine horizons.

## Selected Findings

### *No expansion of the magazine horizon*

The enormous expansion of the spectrum of magazines available in Germany did not serve to broaden the population's magazine horizon. In 1987, each German read an average of 17.7 magazines or weekly newspapers at least very seldom. In 1992, this average value dropped to 17.4 magazines and in 1997 to 16.9 (Table 6). The percentage of people with an above-average magazine horizon of 20 or more titles declined from 35.0 percent in 1987 to 31.0 percent in 1997.

This trend proceeded quite differently in various segments of the population and target groups, as shown in Table 7, in which findings are broken down into socio-demographic subgroups, revealing that—

- Men's magazine horizons clearly narrowed over the past decade. In 1987, 38 percent of all German men read 20 titles or more; 10 years later, in 1997, only 28 percent of all men can now be included in the group of people with an above-average magazine horizon. The magazine horizon of women remained practically unchanged during the course of the past 10 years. The result of this very different trend among men and women is that women now have a broader magazine horizon, whereas the men were ahead 10 years ago.
- Changes in readers' magazine horizon are dependent on age. In the younger age groups, comprising persons 14-19 and 20-29, the horizon has clearly narrowed, whereas it has narrowed only slightly in the group persons age 30-49. The magazine horizon has widened slightly among persons age 50 and over. Magazine horizons have primarily narrowed among those age groups whose TV consumption has risen disproportionately in the past 10 years. Differences in magazine horizons which are age dependent i.e. the tendency for young people to have a broader horizon and older people to have a narrower horizon have diminished noticeably.
- Persons with a higher level of formal education, who typically have a broad magazine horizon, have undergone practically no change with respect to the breadth of their magazine horizon. However, the magazine horizon has narrowed perceptibly among readers with lower and intermediate levels of education.

## The Development of Reading Frequency

Over the past 10 years, the percentage of regular readers decreased markedly for the average title, while the percentage of sporadic readers increased correspondingly. This development was particularly rapid in the first half of the time period under consideration, i.e. from 1987 to 1992. The following five years until 1997 exhibited a certain stabilization of regular readers on the one hand, while at the same time still indicating an increase in seldom readers, on the other (Table 8).

Highly dissimilar developments were observed in the individual segments of the diverse German magazine market (Table A1). Particularly the large weekly news magazines which, as general interest titles, cover many topic areas and offer entertaining articles on a large variety of topics in addition to the analyses and background information from the realms of politics, business and society, have suffered a loss of regular readers. Genres which provide information and entertainment which address major target groups, yet do not deal exclusively with one topic, have also experienced an above-average loss of readers. This includes bi-weekly and monthly women's magazines, magazines for young people or parents and men's magazines. The share of regular readers has remained practically constant with respect to TV guides and magazines for automobile club members. Aside from these special cases, magazine segments which are either unaffected or only affected to a below-average degree by the general tendency towards more irregular title usage generally tend to be special interest titles which cover a relatively narrow range of topics or even specialize in one particular topic. Oftentimes, these topics are from the leisure-time or hobby sector, e.g. general and specific sports magazines, scientific and cultural journals, automotive magazines, gardening magazines and do-it-yourself magazines.

## The Development of Amount Read

The second significant aspect of magazine consumption is the amount read. Even at a very early point in time, empirical studies have demonstrated that the amount read correlates strongly with advertisement noting and indicators of reader loyalty (for example, Tennstädt and Hansen, 1981).

Between the mid eighties and early nineties, there was a drop in the amount read (Table 9). Parallel to the drop in regular readers, a year-by-year analysis indicates that there was a continual decrease in amount read. Magazines were being read less and less regularly and, at the same time, they were increasingly not being read in their entirety. In the early nineties, however, this parallelism disappeared. Whereas reading frequency continued to drop, the amount read increased slightly (Table 9). Our annual analyses for all print media indicate that the trend bottomed out in fall 1991/spring 1992. Since that time, we have registered a continual—albeit only slight—increase in amount read. When the findings are broken down according to different magazine genres, an irregular pattern is evident. For example, in the case of magazines for young people, the amount read again decreased significantly between 1992 and 1997, whereas special interest magazines for outdoor sports showed a disproportionately high increase during this same period (Table A2).

## Conclusion

Should the trends in consumption behavior on the part of the German population continue as described in this paper, we will have to reckon in the future with large numbers of highly specialized magazines which only reach a relatively small group of readers. No broadening of the magazine horizon of the total population is to be expected.

The steadily increasing share of occasional or sporadic readers renders the correct and complete ascertainment of this readership segment is becoming ever more significant for coverage findings. In this connection, much more attention should be paid to the use of filter questions in readership ascertainment. Title confusion will take on even greater significance, since such confusion is presumably more common among sporadic readers (McGlathery, 1993).

Increasing amount read signals that the individual issue is being used more intensively on average and is thus clearly indicative of a rise in advertisement noting.

## Bibliography

- McGlathery, Donald, (1993)*Does Title Confusion Affect Magazine Audience Levels?* Worldwide Readership Research Symposium VI, San Francisco, 1993.
- Tennstädt, Friedrich W. R. and Jochen Hansen, (1981), *Calibrating Quality of Reading*. Proceedings of the First International Readership Research Symposium, New Orleans, 1981.
- Tennstädt, Friedrich W. R.,(1983), *Effects of Differing Methods on the Level of Magazine Readership Figures*. World Wide Readership Research Symposium II, Montreal, 1983.

Table 1

NET ADVERTISING INCOME IN 1986 AND 1996

	1986		1996		Change 1986 – 1996 (1986=100) Index
	Absolute mill. DM	Proport. %	Absolute mill. DM	Proport. %	
<b>Advertising medium</b>					
Newspapers* .....	6,525	48.5	11,344	42.8	174
Consumer magazines .....	2,732	20.3	3,417	12.9	125
Professional journals .....	1,475	11.0	2,300	8.7	156
<b>Subtotal- Print media</b>	<u>10,732</u>	<u>79.8</u>	<u>17,061</u>	<u>64.4</u>	159
Television .....	1,496	11.1	6,897	26.0	461
Radio .....	580	4.3	1,187	4.5	205
Cinema .....	140	1.0	300	1.1	214
Outdoor advertising .....	514	3.8	1,038	3.9	202
<b>Total advertising media</b> .....	<u>13,462</u>	<u>100.0</u>	<u>26,483</u>	<u>99.9</u>	197

\* Daily newspapers, weekly and Sunday newspapers, newspaper supplements

SOURCE: ZAW, Zentralausschuß der Werbewirtschaft e. V.

Table 2  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1992)

**INCREASING TIME ALLOTTED FOR TV CONSUMPTION**

**QUESTION:** "How many hours would you say you watch TV on a normal workday—that is, from Monday to Friday—about how many hours do you watch on average per day?"

	1989 %	1992 %	1997 %
4 hours or more .....	12.2	15.3	22.1
About 3 hours .....	21.3	24.4	25.8
About 2 hours .....	35.6	33.6	30.3
About 1 hour .....	17.3	13.7	11.4
Less than 1 hour .....	12.5	11.0	8.7
Never watch television .....	1.1	2.1	1.8

**SOURCE:** Allensbach Media Market Analyses

Table 3

**CONSUMER MAGAZINES IN GERMANY**

<b>Titles which belong to the IVW</b>	1989	1992	1997
Number of magazine titles .....	426	584	765
Circulation of all titles (1,000 copies) .....	108,112	131,488	142,493
Average circulation per title (1,000 copies) .....	254	225	186

**SOURCE:** IVW, all data is for the first quarter of the year; Federal Republic of Germany, including Eastern Germany as of 1992.

Table 4  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1992)

MAGAZINES ASCERTAINED IN THE AWA: 1987, 1992 AND 1997

	AWA '87	AWA '92	AWA '97	Change 1987 - 1997 (1987=100) Index
<b>Number of magazines and weekly newspapers ascertained .....</b>	151	213	235	156
<b>Of these, those whose coverage per issue is:</b>				
Less than 1 percent .....	34	74	99	291
1 to less than 2 percent .....	45	55	62	138
2 to less than 5 percent .....	43	51	47	109
5 to less than 10 percent .....	19	23	20	105
More than 10 percent .....	10	10	7	70

SOURCE: Allensbach Media Market Analyses

Table 5  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1991)

INDICATORS OF THE INTERVIEW ATMOSPHERE

a)	<u>Interviewers' account</u>		<u>Respondents' account</u>	
	Duration of Interview	Interview was <u>not</u> much too long	Interview was (very) interesting	Would participate again: very gladly/ gladly
	Min.	%	%	%
AWA '87 .....	110	77	65	55
AWA '88.....	108	79	64	55
AWA '89.....	108	81	63	56
AWA '90.....	112	80	64	57
AWA '91.....	116	80	68	59
AWA '92.....	118	79	67	59
AWA '93.....	119	80	67	60
AWA '94.....	120	82	67	61
AWA '95.....	121	78	67	61
AWA '96.....	123	76	65	59
AWA '97.....	126	75	64	57

b) Actual duration of the interview in comparison to the respondents' estimation (on average)

	Duration of interview	
	Actual duration	Respondents' estimation
	Min.	Min.
AWA '87.....	110	94
AWA '97.....	126	110

SOURCE: Allensbach Media Market Analyses



Table 6  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1992)

**NO WIDENING OF THE MAGAZINE HORIZON  
AMONG THE TOTAL POPULATION**

	1987 %	1992 %	1997 %
<b>Persons who read at least seldom (broadest readership) –</b>			
Fewer than 5 titles .....	15.5	16.6	16.9
5 - 9 titles .....	20.5	21.3	22.5
10 - 19 titles.....	29.0	30.1	29.6
20 - 29 titles.....	16.9	14.9	14.6
30 titles or more .....	18.1	17.1	16.4
Average (number of titles) .....	17.7	17.4	16.9

\* The figures shown consider all magazines (including illustrated magazines for specific cities and towns and customer magazines) and weekly newspapers. The 1987 AWA included a total of 152 titles, 213 titles were ascertained in the AWA '92, and 246 titles were included in the AWA '97.

SOURCE: Allensbach Media Market Analyses

Table 7  
 Federal Republic of Germany  
 (including Eastern Germany since 1992)

DEVELOPMENT OF THE MAGAZINE HORIZON  
 AMONG MEN AND WOMEN, AND ACCORDING  
 TO AGE AND EDUCATION

	1987	1992	1997	Change 1987 -1997 (1987 = 100)
	%	%	%	Index
<b>Percentage of persons with a broad magazine horizon*) in the following target groups:</b>				
Total population .....	35.0.....	32.0 .....	31.0	89
Men.....	37.7.....	31.0 .....	28.2	75
Women .....	34.2.....	32.9 .....	33.7	99
<b>Ages:</b>				
14 – 19 yrs. old.....	42.2 .....	36.1.....	30.2	72
20 – 29 yrs. old.....	44.9 .....	40.2.....	34.8	78
30 – 49 yrs. old .....	39.7.....	37.6 .....	37.0	93
50 and over .....	24.6.....	22.8 .....	25.6	104
Elementary education.....	29.3 .....	26.4 .....	25.2	86
Intermediate education.....	43.4 .....	37.6 .....	33.8	78
Higher education .....	43.0 .....	40.6 .....	41.7	97

\*) 20 or more titles are read at least very seldom. The figures shown consider all magazines (including illustrated magazines for specific cities and towns and customer magazines) and weekly newspapers. AWA '87: 152 titles; AWA '92: 213 titles; AWA '97: 246 titles.

SOURCE: Allensbach Media Market Analyses

Table 8  
 Population 14 and over  
 Federal Republic of Germany  
 (including Eastern Germany since 1992)

DEVELOPMENT OF READING FREQUENCY  
 FOR MAGAZINES AND WEEKLY NEWSPAPERS

	1987	1992	1997	Change 1987 - 1997 (1987 = 100)
	%	%	%	Index
<b>Of readers per issue (average for all magazines), persons who read -</b>				
Frequency category				
1 Regularly, all issues.....	20.4 .....	17.3 .....	17.4	85
2 Fairly regularly.....	14.9 .....	12.9 .....	12.8	86
3 Fairly often.....	17.4 .....	15.9.....	15.5	89
4 Now and then.....	28.0 .....	30.2.....	28.8	103
5 Seldom.....	19.3 .....	23.8.....	25.6	133

\*) The figures shown consider all magazines and weekly newspapers which were ascertained in the Allensbach Media Market Analysis of that particular year.

SOURCE: Allensbach Media Market Analyses

Table 9  
 Population 14 and over  
 Federal Republic of Germany  
 (including Eastern Germany since 1992)

DEVELOPMENT OF AMOUNT READ  
FOR MAGAZINES AND WEEKLY NEWSPAPERS

	1987 %	1992 %	1997 %
<b>Of readers per issue (average for all magazines), persons who, in the issue last read, noted:</b>			
All, almost all pages.....	37.9	32.3	32.8
About three fourths.....	26.8	26.1	27.5
About one half.....	19.3	21.8	21.6
About one fourth.....	9.9	12.4	11.4
Only very few pages.....	6.1	7.4	6.7

} 64.7                      } 58.4                      } 60.3

\*) The figures shown consider all magazines and weekly newspapers which were ascertained in the Allensbach Media Market Analysis of that particular year.

SOURCE: Allensbach Media Market Analyses

Appendix 1

**AWA Scales Used to Ascertain  
Reading Frequency and Amount Read**

a) Reading frequency:

- Step 1: I read this title regularly, and all issues which are published
- Step 2 : I read it fairly regularly, although not all issues
- Step 3 : I read it fairly often
- Step 4 : I read it now and then
- Step 5: I (very) seldom read this title

b) Amount read:

- Step 1: All, almost all pages
- Step 2: About three fourths
- Step 3: About one half
- Step 4: About one fourth
- Step 5: Only very few pages

**SOURCE: Allensbach Media Market Analysis**

Table A1  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1992)

**THE PERCENTAGE OF REGULAR READERS  
IS DECLINING IN MANY MAGAZINE SEGMENTS**

	1987	1992	1997	Change 1987 -1997 (1987 = 100)
	%	%	%	Index
<b>Regular readers*) among readers per issue:</b>				
All magazines.....	35.3.....	30.2 .....	30.2	86
<u>Selected magazine segments</u>				
Current and illustrated magazines.....	43.1 .....	35.6 .....	35.5	82
Magazines on contemporary events .....	50.7.....	40.6 .....	33.6	66
TV guides in the high price range .....	71.3 .....	67.8 .....	70.8	99
TV guides in the mid/low price range .....	63.3.....	60.1 .....	62.1	98
Bi-weekly TV guides.....	—.....	53.3 .....	61.2	—
Weekly women's magazines.....	44.8 .....	37.9.....	37.5	84
Bi-weekly women's magazines.....	29.8 .....	23.4.....	19.9	67
Monthly women's magazines .....	23.9 .....	20.7 .....	17.5	73
Magazines for parents.....	36.0 .....	32.6 .....	23.3	65
Magazines for young people .....	34.8 .....	34.1 .....	24.2	70
Gardening magazines.....	31.9 .....	28.6 .....	27.8	87
Do-it-yourself magazines.....	24.5 .....	19.9.....	21.3	87
Men's magazines.....	19.4.....	20.1 .....	14.7	76
Automobile club magazines.....	49.2 .....	43.8.....	47.4	96
Automotive magazines.....	34.5 .....	29.8.....	30.4	88
General sports magazines.....	29.1 .....	32.8.....	33.3	114
Specialized sports magazines .....	36.8 .....	32.0 .....	34.9	95
Science and cultural magazines .....	31.5 .....	27.1 .....	28.0	89
Travel and vacation magazines .....	26.9 .....	20.7 .....	22.2	83
Business magazines.....	29.5.....	29.6 .....	27.4	93
Weekly newspapers.....	54.1.....	46.9 .....	43.5	80

\*) The table shows the percentage of regular readers (steps 1 and 2 on the frequency scale) among readers per issue for all titles on average or, respectively, for the titles in each magazine segment.

SOURCE: Allensbach Media Market Analyses

Table A2  
Population 14 and over  
Federal Republic of Germany  
(including Eastern Germany since 1992)

THE AMOUNT READ IS INCREASING IN  
MANY SEGMENTS

	1992	1997	Change 1992 – 1997 (1992 = 100)
	%	%	Index
<b>Readers who use at least 3/4 of all pages among readers per issue:</b>			
All magazines.....	58.4.....	60.3	103
<u>Selected magazine segments</u>			
Current and illustrated magazines.....	60.1 .....	64.8	108
Magazines on contemporary events .....	60.2.....	59.3	99
TV guides in the high price range .....	69.1 .....	69.5	101
TV guides in the mid/low price range .....	71.9.....	71.9	100
Bi-weekly TV guides.....	71.4 .....	67.4	94
Weekly women's magazines .....	68.6 .....	71.4	104
Bi-weekly women's magazines .....	63.3.....	63.6	100
Monthly women's magazines .....	58.2 .....	56.6	97
Magazines for parents.....	62.6 .....	63.8	102
Magazines for young people .....	70.5 .....	65.6	93
Gardening magazines.....	67.6 .....	66.6	99
Do-it-yourself magazines.....	56.1 .....	59.9	107
Men's magazines.....	52.9.....	57.7	109
Automobile club magazines .....	50.4 .....	55.1	109
Automotive magazines.....	62.7 .....	62.8	100
General sports magazines.....	67.2 .....	66.1	98
Specialized sports magazines .....	58.3 .....	64.2	110
Science and cultural magazines .....	57.3 .....	57.6	101
Travel and vacation magazines .....	54.1 .....	52.9	98
Business magazines.....	51.9.....	52.2	101
Weekly newspapers.....	54.4.....	57.2	105

SOURCE: Allensbach Media Market Analyses

