

Transforming Magazines

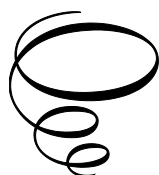
Transforming Magazines:

*Rethinking the Medium
in the Digital Age*

Edited by

Carla Rodrigues Cardoso
and Tim Holmes

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Transforming Magazines: Rethinking the Medium in the Digital Age

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To Tiago, for everything
CRC

To Bekky, without whom nothing would be possible
TH

“Everything must change so that everything can stay the same”

—Giuseppi de Lampedusa, *The Leopard*

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FOREWORD

JAMES HEWES
PRESIDENT & CEO, FIPP

Two magazine covers hang on my office wall. The first is *Rolling Stone*, dated November 25th 1971, containing the final instalment of Hunter S. Thompson's *Fear and Loathing in Las Vegas*, his "savage journey to the Heart of the American Dream." The other is an issue of *Car and Driver*, also from the 1970s, featuring the first Cannonball Run, the annual illegal coast-to-coast road race, originally started to protest the introduction of the 55mph speed limit.

Both magazines, and the stories they highlight, reflect their times and it seems hard in the 21st Century to imagine large, mass-readership magazines actively encouraging drug-taking, heavy drinking, speeding and open defiance of authority. In the 1960s and 1970s, it seems hard to imagine anything else. These magazines were a product of their times.

They illustrate that magazines have always been a reflection of the modern world. Consider a magazine like *The Spectator* (UK), in print since the 1820s. From its origins, passed around London's coffee shops in the pre-Victorian era, it has contemporaneously covered topics as diverse as the Great Reform Act of 1832, the Opium Wars, the American Civil War, both World Wars, the fall of the Berlin Wall and 9/11, whilst finding time to publish the first review of Dickens' novels.

Through content, design, production, even distribution and certainly the advertising they contain, an individual issue of a magazine provides a glimpse into what was relevant that week, that month or that year. Taken together over many thousands of magazines and many tens of thousands of issues, they provide a portrait of an era, showing how society, fashion, opinions, politics, and economics have changed over the course of the last 200 years.

Such an important cultural phenomenon is worthy of serious academic study, providing a window onto the past whilst training the next generation of journalists, publishers, and editors, who will take the industry on into the rest of this century.

The sessions which took place at (Trans)forming Magazines provided¹ a comprehensive sample of the different aspects of the industry's past, present and future, starting with the changing nature of the business model. Magazines have become multi-platform media brands, with print finding its place amongst a wealth of platforms as a high-quality, high-trust luxury medium.

The idea of magazines as a community, a critical success factor for any magazine brand, is explored by looking at the impact on everything from niche audiences to an entire generation. Think back to *Rolling Stone* and its impact on baby boomer culture – this was not a static phenomenon; it continues to this day. Linked to this is the question of how magazines have covered gender issues, an area that requires more work as the industry continues to evolve.

None of this could happen without the rapid evolution of the magazine industry business model. The replacement of the old, dual-income, print-based economy with a multi-platform, direct-to-consumer, diversified revenue business occupies every publisher's thoughts. The transformation of the industry continues apace, throwing up new subjects for research and evaluation.

The magazine industry, or more properly the magazine media industry as we should call it today, continues to have an extremely bright future. There has never been a more exciting time to work in our industry than now, there have never been more opportunities for growth and development, both personal and professional. Magazines defined the last century and magazine media is rising to meet the opportunities presented by this.

FIPP members are involved in the creation, publishing and/or sharing of quality content to defined audiences of interest, irrespective of platform(s) used.

¹ *(Trans)forming Magazines* was the sixth edition of the international conference Mapping the Magazine, held in Lisbon, July 2020. James Hewes was one of the conference's keynote speakers.

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However, there are also chapters derived from earlier editions of the conference held in Sydney and Chicago. Everyone involved in hosting and running those events also has our undying thanks but we particularly wish to acknowledge—

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INTRODUCTION

We need magazines. They are the most human of all media. Like people, there are multifarious types of magazine, reflecting the diversity of humankind, creating communities of enthusiasts in subjects or around objects. Despite this, magazines face what may well be their greatest challenge to date: digital transition.

The path from print to online has undoubtedly been hard for newspapers. But their essentially informative nature helped them along. Magazines, however, are much more than information. Magazines are also interaction, leisure and fruition. They interact with their readers, with whom they build a close relationship. In print, they flaunt their glamorous covers, complex communication apparatuses that are open to a wide range of interpretations and able to connote the positioning of each publication in the market.

How does one keep the “magazine spirit” on a screen without a tangible body, without the transportable, admirable, collectible object? This is the million-dollar question underlying *(Trans)Forming Magazines: Rethinking The Medium in The Digital Age*. It is also the burning question that the magazine industry has been asking and for which it needs academia to help provide an answer.

This book stemmed from the sixth edition of the three-day international conference Mapping the Magazine, which took place in Lisbon, Portugal, hosted by Lusófona University, in July 2020. This was the first virtual conference organised by this institution, in response to the constraints imposed by the Covid-19 pandemic, which had broken out in the country four months before. Now we have the opportunity to read the best papers presented in Lisbon, with a selection of exceptional material from earlier editions in Chicago and Sydney.

(Trans)Forming Magazines: Rethinking The Medium in The Digital Age begins with a Foreword by James Hewes, CEO of FIPP, the organisation that represents the magazine industry, and ends with an epilogue signed by Professor David Abrahamson, one of the academics who has contributed

the most to the development of Magazine Studies. Between the two, the reader can find sections on “Business Models & Professional Practice”; “Community & Identity”; “Digital & Social”; and “Gender”. The four book sections aggregate 16 chapters, which are the result of the collaboration of 19 authors from 10 countries: Portugal, with five chapters; the United Kingdom and the United States, with two chapters each; and seven other nations – Germany, Belgium, Italy, Finland, Brazil, Egypt and Australia.

The geographic diversity is matched by the diversity of study areas. About two thirds of the authors are researchers in Communication Sciences, especially from the areas of Media Studies and Journalism. But there are also researchers from Cultures and Literature Studies; Creative Media Industries; as well as Publishing, Fashion and Visual Studies.

As becomes clear in this book, Magazines Studies remains a multidisciplinary field, but one which continues to be classified as emerging. The diversity of print magazines has always made it difficult to define a single methodology of analysis. And the fact that they are mostly considered part of the territory of soft news and positive information removes them from the orbit of most journalism scholars, who are only interested in newsmagazines and little else.

This begs the question: is it still worthwhile investing in a field that remains unconsolidated, decades after its first studies? What is the importance of the object of study – the “magazine”? Its importance is clear if we reduce the magazine to its essence: creator of communities, of connections between people. What differentiates magazines from all other media is this aggregating capacity which, in the era of tribal diffusion predicted by Marshall McLuhan, is more necessary than ever.

Whereas print sales have decreased, online magazines have multiplied, either representing a physical body or as digital natives. In most cases, they still need to dive into the tools of storytelling and immersive journalism to regain their unique character. To continue to analyse them, academics must join forces transnationally to undertake research projects that demonstrate the importance of this field of study. And they must invest in close collaboration with the industry.

Print magazines are experiences in disconnection, in an era when everyone yearns to shut off, even if only for a few seconds. They are objects of fruition with a beginning, a middle and an end. A physical experience

that does not require the use of screens, electricity or batteries, a luxury that will endure. In the digital environment, they break up into multi-platform media brands, mostly accessible to all, and strive to transfer into the digital environment their community-forming identity of sharing between human beings. It is possible to create a bridge between industry and academia, and *(Trans)Forming Magazines: Rethinking The Medium in The Digital Age* is a contribution to that project.

Carla Rodrigues Cardoso and Tim Holmes

SECTION 1:
**BUSINESS MODELS & PROFESSIONAL
PRACTICE**

CHAPTER 1

SUSTAINABILITY IN SPECIALIST PUBLISHING: A COMPARATIVE CASE STUDY ANALYSIS OF A BRITISH AND AMERICAN WRITING MAGAZINE

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Abstract

To help stem the tide of print magazine closures, more research is needed to ascertain what makes a title profitable and sustainable in the long term. Research suggests that in an era of multiple brand extensions specialist magazines are more likely to achieve sustainability by building a robust subscription and widening participation. According to circulation data, specialist titles tend to have a higher proportion of subscribers than their consumer counterparts, but it is not the same for all the magazines in this sector. In particular, writing magazines in the UK (such as *Writing Magazine*) appear to be struggling whereas one of their US counterparts, *Writer's Digest*, has grown both distribution and brand extensions. This paper will undertake a comparative analysis of two case studies *Writing Magazine* and *Writer's Digest* to identify any consistent or recurring themes such as circulation variations and development of brand extensions. Furthermore, it will incorporate servitization (Viljakainen and Toivonen, 2014) and business models for content delivery (Fetscherin and Knolmayer, 2004) to ascertain if either magazine has achieved financial stability in the face of digital disruption.

Keywords: Sustainability; specialist magazine publishing; digital disruption; audience consumption; servitization

Introduction

Many years ago, being deputy editor of the UK writing title *Writer's Forum*, gave me first-hand experience of magazine publishing before digital disruption—defined by Chandra and Kaiser (2014) as “revolutionizing how people work”—had started to challenge the industry. At the time broadband hadn't taken off, social media had not become an obsession and e-newsletters were yet to hit our inboxes. There were hundreds of writing circles nationwide ranging from having just a few participants to larger clubs with several hundred members, not to mention the National Association of Writing Groups (NAWG). Reading groups had also started to spring up around the country. All of these collectives were our potential audience, and the opportunity for engagement was plentiful. In 2003, the leading newsstand magazines in this genre, *Writer's Forum* and *Writing Magazine*, had a circulation of around 25,000 and 30,000 respectively (Mediatel, 2020), both made a healthy profit from advertising including the classified section.

Nearly 20 years later, the two leading UK monthly writing magazines are struggling to survive. *Writer's Forum* has a circulation of around 18,000 as outlined in its Media Kit (Select Publishing, 2019), *Writing Magazine* is faring slightly better at 19,000 (Writing Magazine, 2020). However, in contrast, their US counterpart *Writer's Digest* is thriving with a circulation of more than 60,000—the majority of those sales coming from the newsstand and subscriptions according to its Media Kit (Active Interest Media, 2020). *Writer's Digest* also has a thriving community in terms of social media engagement and a range of relevant writing-related brand extensions that offer value to the audience, including the Writer's Digest University.

In May 2020, UK magazine publisher Bauer Media announced plans to close or sell ten of its print titles, including specialist publications such as *Practical Photography*, once the Covid-19 crisis ends (Tobitt, 2020). This latest development follows similar announcements in 2019 that titles such as *NME*, *FHM* and *Marie Claire* were ceasing their UK print editions (Sweney, 2019), suggesting a downward spiral in print magazine publishing, which began with the digital disruption era in 2008. Thus, it is crucial to ascertain how titles can develop sustainable business models for

the long term.

This paper will evaluate the sustainability potential of this genre by comparing case studies of *Writing Magazine* and *Writer's Digest*. It will examine concepts such as the work of Viljakainen & Toivonen (2014) on servitization and co-creation of customer value; as well as an evaluation of Frow et al, (2014) on value propositions, supporting the importance of creating communities and applicability to specialist publishing. The study will seek to answer the following question: Can a writing magazine achieve sustainability by adding value services to widen audience participation?

Contextual Review

This paper will investigate, through an analysis of literature, how both writing magazines have evolved in terms of their business strategies following an economic downturn in publishing, the global recession of 2008 and emerging new technologies. Therefore, the contextual review will explore three key areas that have impacted on magazine publishers: digital disruption, changes in audience consumption and the emergence of servitization.

Digital disruption

Digitization, which has generally had a negative impact on print media, is acknowledged by BarNir et al, to be “a disruptive, creative force that is revolutionizing how people work, play, communicate, buy, sell, and live” (2003, 792). However, before examining the impact, we must first define digital disruption and explore how the definition can be applied to magazine publishing.

According to Skog et al, (2018), digitization is defined as environmental turbulence resulting from digital innovation, leading to the erosion of boundaries and business practices that underpin production and revenue. Skog et al's definition can be applied to magazine publishing when looking at a shift towards online content, which began in the late 1990s but took hold in the early 2000s. Consequently, traditional print media has faced significant challenges, particularly impacting on newspapers and magazines (Chandra and Kaiser, 2014, 1829). As Chandra and Kaiser observed, audiences began to move away from print during this time preferring

instant, free online access to content. As a result, advertisers also switched their allegiance favouring websites to traditional media formats.

This societal shift, followed by a global recession in 2008, is likely to have resulted in a loss of advertising revenue for print magazines (Powell, 2013) around that time circulation on writing magazines began to fall. Powell cites the emergence of digital media as exacerbating the loss of advertising revenue with regards to print media, the rationale being that digital offered advertisers a more immediate and trackable connection to their target audiences. Such factors marked a critical turning point in magazine publishing, which had—up until that point—traditionally drawn revenue from advertising, subscriptions and single-copy sales (Kobak, 2002). This model has been defined as the principal magazine publishing business model, yet it was somewhat limited by having so few revenue streams (Kobak, 2002; Holmes & Nice, 2012).

While theorists have outlined the challenges that digital disruption has caused print media, it has also driven new revenue streams through brand extensions such as events, database provision and digital versions, thus providing additional income opportunities (McKay, 2019). Following the emergence of new technologies, including high internet speeds, 4G, social media and platform development, together with the evolution of smartphones and tablets, today's audiences expect magazines to have more outputs, and publishers now must service multiple content strands through a single publication (Holmes & McKay, 2019). Furthermore, the value of digital is also reinforced by Chandra and Kaiser (2014), whose findings show that advertisers may benefit from print titles offering multiple platforms and strands for advertisements to increase reach.

However, these arguments contrast with Powell, who sees the digital disruption in a more negative light due to its direct impact on the loss of advertising revenue. Abrahamson also identifies some negative issues around digital disruption, arguing that changing technologies and a volatile environment has resulted in real challenges for the publisher and reader because “it distorts, even violates, the implicit magazine-reader social contract” (Abrahamson, 2016).

Yet despite Powell and Abrahamson's concerns, observations mostly point towards digital disruption having a positive effect. But before conclusions can be drawn, it is critical to understand that while revenue

strands have increased, emerging technologies have driven up production and infrastructure costs (Holmes & Nice, 2012). According to Stam & Scott magazine publishing costs have increased “exponentially in the past 20 years” (2014, 77). The creation and management of their editorial content are IT-dependent as media publishers have had to invest significantly in web creation in the early Noughties, followed by further investment to fund the emergence of digital editions for smartphones and tablets (Stam & Scott, 2014). Such investment demands and increasing costs, together with the rise of digital editions have led to magazine brands developing new strategies. Many publishers have branched out by creating multiple brand extensions from which to derive new sources of income and thus become more sustainable, while also counteracting the change in how audiences consume publications.

Changes in audience consumption

The measurement of audience consumption has always been crucial to publishers, who repackage detailed reader data (from age, earnings or disposable income to lifestyle and editorial preferences) into media kits, to use as a sales tool to sell advertising space to media buyers (Morrish, 2003). Initially, publishers employed a primitive method known as the editorial-interest method of measuring magazine audiences, where respondents were interviewed on the contents of a particular magazine issue. But that was found to be ineffective by Marder whose study identified two core issues with this method; the first was that it is “used neither as a projective device nor as a measure of attitudes” therefore leaving numerous margins for error such as over-reporting where participants have not read the specified edition of the magazine; secondly, because of an opportunity for under-reporting, where a participator claimed to have read an issue they hadn't seen (Marder, 1967, 3).

Until digitization magazine audience figures were traditionally measured through reader surveys, circulation metrics (the number of copies sold) and readership figures estimating how many people read each magazine sold (Kobak, 2002). More detailed information on reader habits could be procured from organizations such as The National Readership Survey, which conducted interviews with people in their homes to establish their

consumption habits (Morrish, 2003).

However, because of emerging digital technologies, the data has become more sophisticated and accurate. For example, the invention of data dashboards can demonstrate the impact of content on an audience, enabling publishers to tailor their content to attract those more defined, niche audiences that are highly desirable to their advertisers (Napoli, 2011). Moreover, the emergence of dashboards, offered by digital platforms such as Readly, now provides publishers with detailed insight into audience consumption habits (Hill and Hogarth, 2018). Research undertaken by Napoli (2011) observes that digital footprints have enabled the media to become more interactive, gaining a more accurate picture of consumption, content preferences and levels of engagement.

Yet such vision may not be the key to achieving sustainability because magazine circulation figures continue to fall and are in the “face of a long-term decline” as a result of digital technology (Das 2016, 15). Significant falls in UK magazine sales over the past year, are reinforced by the B2B publication *Press Gazette* (2020), which cites the latest metrics from the Audit Bureau of Circulation, noting a downward cycle in circulation figures among consumer magazines. *Stuff*, a technology magazine that had a circulation of 62,391 at its peak in 2013 (BRAD, 2020), has suffered the most significant year-on-year decline among men's titles with a year-on-year decrease of 24 per cent, while *National Geographic*'s circulation dropped 22 per cent. However, *National Geographic Traveller* saw an increase of 22 per cent (Tobitt, C, 2020). Despite a general downward trend, circulation continues to grow for some special interest magazines such as *Country Walking* and MCN (*Motorcycle News*) according to magazine publishing B2B *InPublishing*, which also highlighted stability among Dennis Publishing's specialist titles with a 21.7 per cent growth across its digital subscriptions (*InPublishing*, 2020).

A decline in audience engagement coincides with technological advancements that have enabled readers to choose how, when and where they consume editorial, which is now available from an array of sources and platforms that didn't exist 20 years ago. Napoli (2011) describes this as intra-media fragmentation, which has impacted on audiences resulting in more autonomy in the consumption of media, suggesting that readers now have more control of the consumption process as engagement moves away

from passive media towards a more interactive communication process. This more interactive engagement was identified by Nightingale and Dwyer (2006). They argue that audience participation is highly successful, particularly in terms of enhanced TV programming formats and can now be widely integrated using a range of tools such as voting and sharing content.

Compared to the UK, the United States appears to have less of a downward spiral in the specialist magazine sector, according to Statista, which reported that special interest was the fastest-growing genre of 2018. Despite a sharp fall in revenue, overall American magazines audiences have slightly increased since 2012, while the number of published magazines has remained stable since 2008, with only a slight decrease from 7,383 to 7,218 (Watson, 2015). Such stability may account for the discrepancy between the downward spiral of *Writing Magazine* and its US counterpart, *Writer's Digest*, which has seen significant growth in terms of audience engagement. However, in terms of audience consumption, it is essential also to consider that magazines may have a specific lifespan depending on the genre and type of content. For example, a publication's cycle takes the format of moving from the launch issue on to survival, then reaching maturity at which point copy sales may peak, before slipping into a decline that is often counteracted by a relaunch or change in editorial strategy (Holmes 2003; Kobak 2002). Indeed, the slump in the circulation of print editions could be considered a consequence of new media platforms, apps and digital editions as audiences may prefer to view publications in a different format (Das, 2016).

When considering these arguments, detailed data on audience consumption and needs can become an asset in terms of developing a sustainable publication that encompasses print, digital and online in what Picard defines as a "value chain" (2011, 45). The value chain model demonstrates core points of value in the magazine production and distribution process, with each link impacting on the next to the end of reaching the buyer—with the reader consuming content for subsequent gain (Picard, 2011). His theory supports the concept of having transferable content to attract sufficient audience consumption to achieve sustainability, leading to new business models such as service that provide value networks and learning development opportunities (Lusch, Vargo and Tanniru, 2010).

To further support a move towards digital opportunities, Sullivan (2017) compares the traditional monthly magazine revenue model of drawing revenue from advertising and circulation with a broader income strategy. Citing *The Atlantic*, a Washington-based magazine that achieves the majority of its revenue from digital sources, live events and consultancy, Sullivan (2017) demonstrates the strength of a multi-strand approach. As advertising revenues decline, it is reasonable to suggest that media economics is transforming as a result of digital disruption (Lusch, Vargo and Tanniru, 2010; Sullivan, 2017). In terms of writing magazines, servitization may provide an opportunity to create additional revenue streams and widen participation. To further broaden the scope, Frau (2014) suggests that there is growing interest in creating value propositions that could result in co-creations.

The emergence of servitization and communities

Initially identified as “the servitization of business” this concept has been defined as adding value to a business by developing services for customers (Vandermerwe and Rada, 1988, 315). Since the development of servitization, value propositions have played a significant role in business models (Payne and Frow, 2014). Although this concept was initially developed for corporate strategy by Vandermerwe and Rada (1988), to add value to businesses, the servitization theory has been applied to magazine publishers, who have had to develop brand extensions that serve their audiences while also generating revenue. Viljakainen & Toivonen (2014), state that the development of such extensions suggests the publishing industry is indeed becoming service-orientated, Rohrbeck (2011) having previously described such issue driven foresight as strategies created out of a need to grow and evolve a business. Moreover, three critical motivations driving servitization have been identified; these are economic, user needs and competitive motives (Viljakainen and Toivonen, 2014). All three motives can be applied to magazine publishing, which as Das (2016) observes, has suffered a significant decline in revenue and audience engagement. Consequently, for magazines to achieve sustainability, new revenue streams must be explored.

There are few direct studies of servitization with regards to magazine publishing, which is somewhat problematic for this paper. However, a study conducted by Frow et al (2014), revealed five fundamental premises that can be applied to magazine publishing. In particular, the fourth premise—“Value propositions may change over time and shape new resource integration within the service ecosystem” (327)—is of specific relevance because audiences continually evolve, as does technology. Thus suggesting that for magazines to be sustainable publishers must continue to meet audience needs.

Building a community with servitization can be compared to a similar tactic of cultivating a cult audience. The American business magazine *Fast Company* achieved such a feat, by developing conferences as a way of bringing readers together after Alan M Webber, a founding editor, admitted that “selling a magazine is not just enough anymore” (Kuczynski 1998, np). This demonstrates that the right magazine brand extensions can also build communities and become a valued commodity in their own right, an idea supported by Sivek and Townsend. They point out the importance of creating numerous revenue strands to support copy sales. To further cement this concept, Sivek and Townsend quote a publisher who told them: “Subscription revenue is fine, but it has to be part of an ecosystem” meaning copy sales must work alongside multiple extensions generating revenue (2014, 16).

Servitization has become part of that ecosystem; it is a concept that has seen accelerated growth because developing a service provision to a brand extension portfolio enables publishers to increase the value propositions of their companies (Viljakainen and Toivonen, 2014). Furthermore, the core motivations for developing such a provision fits with Vargo & Lusch (2010), who note an increasing desire to provide value to audiences in the form of services. They identify this theory as the service-dominant logic, which also “highlights the value-creating nature of consumption” (Viljakainen and Toivonen, 2014; Frow et al, 2014). However, it is also critical to consider the concept of media companies as value propositions, with Payne and Frow (2014) suggesting that the idea plays a crucial part in business strategy by focusing on giving value, while Kaplan and Norton see it as “the essence of strategy” (2001, 329). The impact of technological, economic and societal changes has resulted in convergence with few