

READERSHIP – ITS MEASUREMENT IN 2011 AND BEYOND

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It has been 28 years since Richard Lysaker’s ground-breaking presentation to the Worldwide Readership Symposium entitled *Magazine Readership and its Measurement in 1983*. Exploring the deceptively complex nature of magazine “readership,” Lysaker provided a still-influential framework for understanding readers and reading conditions, built on six dimensions:

Amount of exposure	substantial vs. limited
Type of exposure	reading vs. glancing
Mental set	attentive vs. preoccupied
Purpose of reading	information vs. escape
Frequency of reading	frequent vs. infrequent
Place of reading	home vs. public

Even taking the relatively simple approach of defining each dimension in a dichotomous way, the result was a potentially overwhelming 64 combinations of readers and reading conditions, as shown below when magazines deliver their text-based content in a hard-copy format.

Exposure			Substantial				Limited			
Exposure type			Reading		Glancing		Reading		Glancing	
Mental set			Attentive	Preoccupied	Attentive	Preoccupied	Attentive	Preoccupied	Attentive	Preoccupied
Information	Frequent	Home								
		Public								
	Infrequent	Home								
		Public								
Escape	Frequent	Home								
		Public								
	Infrequent	Home								
		Public								

In the past three decades, content (text-based, video and animation) and access to it have proliferated. Concepts such as *magazine* and *issues* have become ambiguous. Written (text-based) content is repurposed in multiple formats; it is accessed in printed hard-copy, of course. It is also increasingly presented as text-based content that is accessed via digital media. For example, data from the 2011 Ipsos Mendelsohn Affluent Survey suggests that, among those with \$100,000+ in annual household income, 30% have accessed newspaper content online, and 15% have accessed magazine content online. Text-based written content is further repurposed into video or animated formats, and viewed on the screens of computers, smartphones, tablets, e-readers, and more. Adding to an already-complex picture, digital content – text-based and otherwise – can also be accessed through a browser, or dedicated app (again, citing data from the 2011 Ipsos Mendelsohn Affluent Survey, 8% of those with \$100,000+ HHI have downloaded a newspaper app, and 4% have downloaded a magazine app).

In short, there are at least seven modes of accessing “magazine” content. Reproducing Lysaker’s 64-cell grid within each of these seven modes in 2011 results in a “model” with 448 cells is detailed on the following page.

Lysaker’s Reading Model Applied To Seven of 2011’s Modes of Access

	Exposure			Substantial				Limited				
	Exposure type			Reading		Glancing		Reading		Glancing		
	Mental set			Attentive	Preoccupied	Attentive	Preoccupied	Attentive	Preoccupied	Attentive	Preoccupied	
Print	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Computer: Digital Exact Replica	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Computer: Web site w/ similar content to print version	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Smartphone: Browser	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Smartphone: App	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Tablet: Browser	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											
Tablet: App	Information	Frequent	Home									
			Public									
		Infrequent	Home									
	Public											
	Escape	Frequent	Home									
			Public									
Infrequent		Home										
	Public											

Clearly, a more parsimonious model is needed. Therefore, we set out to explore Lysaker’s fundamental questions – what is readership, what are its core dimensions, how do we measure them – with fresh data, and in light of today’s complexities of multiple media platforms..

Quantifying the Reading Experience across Platforms

We began by collecting custom data designed to measure – and synthesize – the dimensions of Lysaker’s 1983 model into a more parsimonious and actionable 2011 model of the modern reading experience. We added a series of reading-related questions to the June 2011 Ipsos Mendelsohn Affluent Barometer, a monthly online tracking survey of the lives, lifestyles and evolving attitudes of at least 1,000 Affluent Americans (adults with annual household incomes of at least \$100,000). Respondents were recruited from a variety of online panels (in an attempt to minimize any biases that might be associated with a single panel), and were sampled and weighted to reflect the national population of adults with \$100K+ HHI according to the U.S. Census Bureau’s Current Population Survey.

Our questions focused on five major “access modes” for written content: magazines, newspapers, computer/laptop, tablet and smartphone. For each access mode, respondents categorized their reading experiences on rating scales that approximate and extend Lysaker’s dimensions. For example, Lysaker’s “purpose of reading” dimension was operationalized by asking respondents if they typically used each access mode for information, entertainment, or if both described their reading habits. This same general approach was used for operationalizing Lysaker’s other dimensions – a three-point scale, anchored at each end by a distinct style of reading, as well as a middle option reflecting the option of “both describe my reading habits.”

The results reveal first the crucial nature of reading across a variety of formats, even in today’s increasingly multi-media world. Nearly two-thirds report reading newspapers “frequently,” as opposed to only 18% who report reading it rarely. Similarly, 60% read on the computer frequently, and 51% read magazines frequently. Although only about one-in-three report reading content frequently on tablets or smartphones, a considerable percent describe their frequency of reading on these mobile devices as somewhere in between “frequently” and “rarely.” None of the five access modes is read “rarely” by more than one-third of the Affluent population.

	Read it frequently	Both describe my reading habits	Read it rarely
Newspapers	65%	17%	18
Computer / laptop	60	28	12
Magazines	51	23	25
Tablet	34	39	27
Smartphone	34	33	33

When asked where they typically read, we find that hard-copy reading, as well as reading on a computer, is most typically done in a “fixed” location (home or office). Tablet reading is roughly equally split between those who read at home or office, and those who split their reading time between home/office and public places. Perhaps surprisingly, reading on a smartphone is not just an “out-and-about” experience – 65% describe their smartphone reading as split – occurring both in fixed locations and in public places.

	Read it at home/office	Both describe my reading habits	Read it in public places
Computer / laptop	68%	30%	2
Newspapers	66	28	6
Magazines	54	40	7
Tablet	42	47	10
Smartphone	13	65	22

The results also reveal the tremendous breadth of reading occasions. Across every access mode, a majority of Affluents describe their reading as both for information and for entertainment purposes. Newspapers are far more likely to be read for information than for entertainment (41% vs. 5%), although a majority still read them for both reasons. Tablets, and to a lesser extent magazines, are more likely to be read for entertainment, although again, a majority read them for both purposes.

	Read it for information	Both describe my reading habits	Read it for entertainment
Newspapers	41	54	5
Smartphone	25	58	17
Computer / laptop	17	73	10
Magazines	14	65	22
Tablet	12	58	31

Most reading occurrences today occur in short “snippets.” No access mode is typically read for “long stretches of time” – with newspapers topping the list with 16%. Moreover, for every access mode, those reading for brief periods far outnumber those reading for long stretches. A majority state they typically read for “short stretches of time” when reading newspapers, magazines or smartphones. A considerable number are “in the middle” for computers and tablets, suggesting that their reading style on these devices varies by reading occasion and objectives.

	Read it for short stretches of time	Both describe my reading habits	Read it for long stretches of time
Smartphone	59%	36%	5
Magazines	56	36	8
Newspapers	53	31	16
Tablet	46	44	10
Computer / laptop	38	52	10

A similar picture of reading patterns emerges when we ask how carefully individuals typically read. Across every mode of access, reading by “scanning and glancing” is more typical than reading carefully. Still, “both” is the most common choice, particularly for reading by computer or laptop, suggesting that reading styles are again shaped by reading occasion and purpose.

	Read it by scanning, glancing	Both describe my reading habits	Read it carefully
Smartphone	44%	40%	16
Tablet	38	49	13
Newspapers	35	44	20
Magazines	33	47	20
Computer / laptop	27	62	12

When asked about “uni-tasking” or “multi-tasking” while reading the most common response is “some of both,” again highlighting the importance of reading occasion and purpose. However, the pattern differs significantly across modes of access. Hard-copy reading, with newspapers and magazines, is more likely to be a “uni-tasking” experience focused solely on reading. Reading on a computer or laptop is equally split, while reading on tablets and smartphones tend to be one of several things done simultaneously.

	Read it while entirely focused on reading	Both describe my reading habits	Read it while thinking about or doing other things
Newspapers	38%	35%	26
Magazines	34	40	27
Computer / laptop	22	54	24
Tablet	16	50	34
Smartphone	15	56	29

Summing Up: The Nature of Reading Today

Reading is widespread, an activity truly integral to modern life, where connectivity and being informed play central roles. Across every media platform, Affluents read both for information and entertainment. Like so many activities in modern life, reading typically occurs in short snippets, in the brief pockets of time available. The nature of reading depends greatly on context and purpose. Sometimes reading involves scanning and glancing; sometimes it is more focused. Sometimes it is one of several simultaneous activities; sometimes multi-tasking is set aside for focused attention just on reading. Smartphones are least likely to be read, and yet are most likely to be read while “out-and-about.” Even then, smartphones aren’t used purely for necessary information, as they are also widely used for entertainment reading as well.

The results also reveal relationships among the dimensions measured. In fact, the average correlation among the dimensions measured was $r = 0.31$, reflecting moderate relationships among the dimensions we measured. Particularly high correlations – in the range of $r = .45$ – are seen among certain dimensions, reflecting two general reading styles:

- Those who tend to read for entertainment also tend to read in short snippets of time, in a glancing style, and in a multi-tasking context
- In contrast, those who tend to read for information tend to read for longer periods of time, read carefully, and focus more specifically on that reading.

Our study reflects characteristic reading styles of individuals – it cannot definitely answer if people change their reading style from one reading occasion to another. In other words, it cannot definitely address whether people in general adopt a short/glancing/multi-tasking style when reading for entertainment. However, given the large number of people who cite the “both describe my reading style” across the dimensions measured, it seems reasonable most people adapt their reading styles to specific occasions, purposes and contexts.

The Challenges of Reading Measurement Across Platforms Going Forward

Clearly, there may be ways of simplifying Lysaker’s model. Some of the aspects of the current reading experiences, though not redundant with one another, show enough overlap that one might reasonably combine dimensions or measure some of them selectively, without too great a loss in precision. But the broader challenge is that no single study yet provides a comprehensive view of reading across platforms, bringing best-in-class methodologies to both print and digital readership. There are variety of syndicated studies recognized by many as tools for measuring print readership, including studies conducted by Ipsos Mendelsohn, MRI, Affinity, Scarborough, Simmons, JD Power, Mars, and more.

Each study has its unique strengths, but in general all provide recognized print audience measures based on large samples, strong representativity, recall measures of reading by specific brand/publication, and so on. Most, if not all, of these studies appear to be moving in the direction of enhancing their measures of reading digital content via computers, smartphones, and tablets. We suspect that the fruits of these initial efforts will likely be presented at this Forum. Still, these studies are survey-based and recall-based, and as a result are subject to a variety of limitations and potential biases. In contrast, the studies recognized as providing strong web audience metrics display the opposite pattern of strengths and weaknesses. Many bring the strengths of passively measuring actual digital behavior, but provide limited or no ability to measure published print content (as well as little or no insight into the context of reading, the psychological experience of reading, etc.).

These challenges are not new. A full taxonomy of nearly two-dozen measurement studies was presented by Gerard Broussard, Bruce Rogers, Dick Bennett and Steve Douglas at the 2009 Print and Digital Research Forum Symposium (see printanddigitalforum.com for the complete paper). These authors demonstrated that the two dozen studies they had examined differed widely in methodology and area of specialization, but none were perfect or provides a comprehensive solution. Some were rich with behavioral data but struggled to answer questions about the “how” and “why” of behavior; others were rich with insight, but lacked fully projectable samples. The list of methodological strengths, weaknesses, and essentially non-overlapping studies was lengthy.

Looking Ahead: Current and Potential Approaches to Combining Print and Digital Readership Data

Looking to the future, we see two routes by which readership research might involve. As usual, each has their own unique strengths and limitations.

In recent years, fusion approaches have been developed in an attempt to link studies with complementary strengths in a statistical manner, sidestepping the methodological challenges of collecting a full range of reading data from single group of respondents. Fusion of all varieties (judgment-based and statistical) has its enthusiasts and its detractors. Some have argued that the statistical processes underlying fusion are ultimately a ‘black box’ of statistical unknowns, a perception shaped in part by the fact that no fusions in the United States to date have completed an MRC-type audit. At the 2009 Symposium, Virginia Cable of Wall Street Journal and Steve Douglas presented a Total Brand Estimate, a judgment-based (as opposed to statistically-based) approach to integrating findings from three currency studies into an estimate of exposure to The Wall Street Journal’s media properties.

Of course, a single study that provides a full-range of print and digital readership measures would be ideal, but faces considerable methodological, logistical and financial hurdles. At the Barcelona 1988 version of this Symposium, Douglas and Wienblatt offered a conceptual “thought experiment” of how such a study might be conducted. And 28 years later no single study yet exists.

The technological and other challenges are obvious, not the least of which would be the significant financial cost. The cost, however, could potentially be offset if the measurement initiative were undertaken, not by a single company, but rather by an industry consortium. In fact, this was proposed at the recent ARF 6.0 Measurement conference in New York City by Google, Time Inc., and Group M, among others. Getting competing firms to collaborate on such an effort is always a challenge, further complicated here by potential violations of U.S. anti-trust law. Still, there are precedents. A comprehensive study of outdoor advertising exposure was poised to be tremendously complex and prohibitively expensive for any single firm, but a joint industry consortium was able to tackle the project.

Final Thoughts

Replicating and extending Lysaker's 1983 effort is difficult to say the least. The measurement of "print" content and where it is consumed is far more complicated with the advent of different platforms, and the many ways a brand's content can be repurposed and presented.

As in 1983, reading is complex and multi-faceted. The nature of the reading experience depends greatly on occasion and content. Still, a general pattern emerges of two types of reading: one that is information-driven, focused, careful and unitasking. Alternatively, entertainment-oriented reading tends to be done by scanning and glancing in the short snippets of time allowed by modern life. Measurement efforts should clearly differentiate between the two, although the effort could be streamlined by noting that these two styles capture much of the essence of the more complete taxonomy of dimensions described by Lysaker.

The future of reading measurement will likely be as complex as the nature of reading itself. Some consider fusion an "interim" step on the path to a comprehensive, industry-driven single-source study (a media research "Manhattan project"). But if the 28 years that have passed since Lysaker's original paper are any indication, the future will unfold in vastly complex and difficult-to-forecast ways.