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## READERSHIP SURVEYS IN JAPAN

### CHARACTERISTICS OF READERSHIP SURVEYS IN JAPAN

Readership surveys do not stir up as much interest in Japan as they do in Europe or the United States. The reason for this is the great stability of Japanese newspaper readership. Monthly subscriptions account for 95% of all general newspaper circulations in Japan. The only exception are sports papers, which are mostly news-stand sales.

The Japan Newspaper Publishers and Editors Association counts 114 member companies and that number has not changed in the 40 years since the war. There have been almost no new newspapers established or old ones closed down in all that time, even with the advent of television in 1958.

This stability means that once a readership survey is carried out, its findings remain essentially valid for the next two or three years. Only slight modifications might be made in line with annual ABC circulation reports.

Let us compare the results of two syndicated readership surveys - Mass Media Research (MMR) and Audience Consumer Reports (ACR) - with the household coverage rates of five national newspapers as indicated

by ABC. (Table 1)

The results vary because the universes are entirely different.

MMR is based on average households consisting of at least two persons.

ACR is based on single individuals.

ABC encompasses single-member households and business offices as well as general households.

Because MMR is household-based, it gives *Nihon Keizai Shimbun* (Japan Economic Journal) a lower household coverage rating than ABC or ACR, because office deliveries account for nearly 30% of this business newspaper's circulation.

It should be pointed out that ACR is not a national survey but is rather a survey of key urban centres; hence, its findings reflect conditions in metropolitan areas.

Also, as ACR's universe consists of individual males and females, aged 12-69, its findings represent its estimated coverage of primary readers of major newspapers.

Magazines in Japan lack national penetration. Even a top magazine with a circulation of one million only

TABLE 1

Newspaper	ABC circulation	Household coverage %	MMR Household readership %	ACR* Individuals readership %
Yomiuri	8,875,184	23.4	23.8	41.0
Asahi	7,455,363	19.7	20.0	30.6
Mainichi	4,198,107	11.1	10.3	12.1
Nihon Keizai	2,073,877	5.5	4.1	8.3
Sankei	1,982,441	5.2	4.3	5.8

\* 30 km radius of Tokyo. All figures for 1984

covers 2 or 3% of national households. Only 5% of total media advertising expenditure goes to magazines.

Because magazine circulations are relatively modest on the whole, very large survey samples have to be taken to obtain an accurate picture of their readership. Obviously, this will cost a lot of money. Therefore, instead of investing large sums in readership surveys, advertisers tend to accept the magazine publisher's own readership data on faith and try to get the best deal possible on advertising rates.

Consequently, both MMR and ACR face difficulties in selling their syndicated media surveys. Although neither company issues revenue figures, the best guess is that MMR's income is 100 million yen (say US\$400,000) while ACR earns about 300 million yen (US\$1.2 million).

In view of the fact, however, that there are 1,600 companies listed on the Tokyo Stock Exchange who are advertisers, that there are 300 advertising agencies, that there are over 100 newspapers and TV stations acting as advertising media, as well as 3,000 magazines, it can be said that these two survey companies have not greatly extended sales of their services.

#### HISTORY OF READERSHIP SURVEYS IN JAPAN

The first known readership survey in Japan was conducted in 1950 by the *Reader's Digest* of Japan under the direction of Mr Malony, who later became chairman of the AMA.

In 1951, the Research Department of Ji ji News Agency set up a market research committee, which has since conducted readership surveys for Ji ji's own 10 or more member companies. This was the first syndicated survey in Japan.

In 1954, Ji ji News Agency established Central Research Service Limited and MMR (Mass Media Research) was launched

the following year. Surveys of newspapers are conducted twice a year and of magazines six times annually. This year marks the company's 30th anniversary.

Initially, MMR covered all four mass media but it dropped TV and radio surveys in 1964 because AC Nielsen in 1960 and Video Research Limited in 1962 started audience rating services. At present, MMR only surveys newspaper and magazine readerships, covering households across the nation.

In 1971, W R Simmons & Associates Inc tried to establish a new operation in Japan but failed. The next year, however, Video Research Ltd started surveys by adapting the Simmons concept. Initially, it was called TMAR (Total Media Audience Research). In 1976, the name was changed to ACR (Audience & Consumer Report).

Thus there are now two sources of objective data for selecting media in Japan: MMR and ACR.

#### Brief highlights

- 1950 Readership survey started by *Reader's Digest*
- 1951 Syndicated media research started by Ji ji News Agency
- 1953 Newspaper advertising readership survey started by *Chunichi Shimbun*, a medium-sized newspaper
- 1955 Mass Media Research (MMR) started
- 1960 TV audience ratings started by AC Nielsen
- 1962 TV audience ratings started by Video Research
- 1972 TMAR (later ACR) started by Video Research
- 1982 Telephone surveys of advertisement attention rates started by *Asahi Shimbun*, one of the major national dailies
- 1983 Surveys by mini-facsimile of newspaper advertisement attention rates started by the *Nihon Keizai Shimbun*

In Japan, individual newspaper

companies carry out extensive surveys of their advertising contents and related matters. Generally, about 300 people are picked from a list of the newspaper's readers. Each person is interviewed by a researcher and asked if he or she had ever seen a particular advertisement pointed out by the researcher. This approach, described as the Starch method, was learned from the Starch company of the United States. At its height, this method was repeatedly used every year by the Asahi, Mainichi, Yomiuri, Nikkei, Sankei and Chunichi newspapers as well as by provincial newspapers.

Such surveys employ a complete interview methodology and the survey subjects must be interviewed regularly. Because of the time and energy consumed, there has been a drop in the frequency of separate surveys, coinciding with the sluggish growth of newspaper advertising in recent years.

These surveys, however, fall outside

the scope of this presentation. I have only mentioned them in passing, as one form of readership surveys carried out in Japan.

#### METHODOLOGY

Representative examples of MMR and ACR methods are shown in Table 2.

The survey area for MMR (Mass Media Research) is all of Japan. Typically, the survey covers 30,000 average households, each consisting of two or more members.

The reason for focussing on households is that both newspapers and TV are addressed towards households. There has been a recent tendency to take in single individuals, but the traditional pattern of focussing on households remains the most common approach.

Survey locations consist of 1,580 spots within cities and 450 spots within

TABLE 2

	<i>MMR</i>	<i>ACR</i>
Research area	nationwide	7 major cities
Universe	households of two persons or more	persons aged 12-69
Method	questionnaire left with interviewee to be filled in	questionnaire left with interviewee to be filled in
Sample size	newspapers - 30,000 households magazines - 5,000 households	10,000
Frequency	newspapers - twice a year magazines - six times a year	once a year
Media surveyed	12 newspapers 17 weekly magazines 33 monthly magazines radio - 0 TV - 0	22 newspapers 77 weekly magazines 115 monthly magazines radio - all programmes TV - all programmes
Definition of readership	newspaper - subscriber magazine - purchaser	knowledge of main editorial articles and picture of cover

towns and villages. From this total of 2,030 spots, random samples are taken by the two-step stratification method. On the average, 15 households are sampled in each district, for a total sample number of 30,000.

In the case of magazines, 5,000 households are selected on average.

Surveys of newspapers are held twice a year, in March and in September.

All magazines are surveyed six times a year. Additionally, the weeklies are surveyed in May and November for additional information, such as the number of readers per household. The women's magazines are also surveyed in July and January and the general monthly magazines in September and March, for extra information.

Newspapers covered by the surveys include five national dailies, six sports papers, one or two regional papers in each area, and eight to 10 prefectural (ie local) newspapers. One or two sports papers and all the English-language newspapers are grouped together. All in all, this means there are 20 to 25 newspapers surveyed in each district. Over a total of six regions into which Japan is divided, this comes to 120 to 150 papers.

The magazines surveyed consist of 17 weeklies and 34 monthlies, the latter consisting of 17 women's magazines and 17 general magazines.

As a rule, the self-completion method is used in surveying both newspapers and magazines, a questionnaire being left with the respondent to fill out. The names of newspapers and magazines are given on a list. Respondents are not shown the title or masthead of the publications. Also, they are asked to check only those newspapers that they subscribe to on a monthly basis.

Similarly, magazine titles are shown on a list. Among the weeklies, only those bought over the past week are to be checked; among monthlies, only those

bought over the past month.

MMR covers household readership which does not cover any pass-along readership. So 'reach and frequency' data are not available.

In the case of ACR (Audience & Consumer Report), the survey area consists of the seven Japanese megapolises (Tokyo within a radius of 30 kilometres, the Kansai district, Sapporo City, Nagoya district, Northern Kyushu, Sendai City and Hiroshima City). Around 12,200 samples are taken and the response rate is 77.8%. A random two-step sampling is used, the names being picked from the registry of local residence. The sampling covers males and females aged 12-60.

The survey time frame is from Monday to the following Sunday in the mid-week of May each year. (In Japan, the new fiscal year begins on 1 April and radio and TV programme schedules are revised then. It is easier to obtain responses when the survey is conducted after programme schedules have been revised. Also, it is convenient to conduct surveys at this time because the findings can be used to plan new programmes for the next year.)

In Tokyo, Kansai, Nagoya and Northern Kyushu, each survey site takes in 10 people. In Sapporo, Sendai and Hiroshima, each site takes in 20 people.

The media surveyed by ACR include television, radio, newspapers, magazines, and transport advertising. Sixteen newspapers with morning editions covering seven districts are included. An additional one to five papers are covered in each district for a total of 37 papers. Also covered are 23 evening newspapers and 45 free or give-away papers. In each case, the respondent is shown a list of media and he checks off those he recognises. The masthead is not shown. For each morning or evening newspaper, the respondents are asked if they had read part of the paper or almost every page.

As for magazines, the ACR survey covers the past four issues of the month of 46 weeklies and the past four most recent issues of 49 monthlies, for a total of 95 magazines.

The questionnaire shows the front covers of past four issues for both types of magazines plus the headlines of five major articles carried in each issue of these magazines. Also shown are the first issue of the month of 31 weeklies and 66 monthlies for a total of 97 magazines, which are only presented as a list for respondents to check.

Questions are broken down into three categories:

- (1) Have you read some part of each specific issue of the magazine?
- (2) Did you buy as well as read some part of each specific issue of the magazine?
- (3) Did you read almost every page of each specific issue of the magazine?

According to those questions, 'reach and frequency' data are available.

Surveys of newspapers, television, radio and transport advertising are conducted over a seven-day period. An interim retrieval is carried out over the first two-day period and the survey is continued for the remaining five-day period. This is done in order to discover quickly any errors in filling out the questionnaires.

A single questionnaire is used to survey all these media, except for magazines, for which a special questionnaire is used.

All television channels are covered at five-minute intervals in the morning from 5 am to 12 noon, in the afternoon from noon to 7 pm, and in the evening from 7 pm to 2 am the next morning.

Radio is also covered in the early morning from 2 am to 2 am next day. In

short, the monitoring is around the clock.

Among transport advertising media, 12 types are checked to supply information on awareness of such types of advertising.

As subscribers to its services, ACR has 10 newspaper companies, 20 magazines, 40 ad agencies (of which 20 also purchase tapes) and three advertisers.

Some people have expressed the opinion that the order of the questionnaire lists should be changed, but neither of the two survey organisations has made any such changes.

Since the entire Japanese archipelago lies within the temperate zone, weather conditions are generally ideal for conducting interview-type surveys. However, the Japanese people are not well accustomed to being surveyed. From my own experience, I would say that 20% are very co-operative, another 60% are reasonably co-operative, and the remaining 20% are adverse to surveys.

Those who object to being surveyed often ask why they have been selected and tell us to inquire elsewhere because they do not know much about the subject matter. We respond by explaining that they have been picked at random, that there is nothing personal in having approached them, and that they do not even have to give us their names.

False answers to readership questions are rare, but there are respondents who refuse to check those media that have a bad reputation in general (ie scandal sheets and lurid publications).

At one time, for instance, the Central Research Service Company Ltd, the major research arm of MMR, was sued by the *Yomiuri Shimbun*, the most widely read newspaper throughout Japan, because the company's survey results indicated that that a large number of respondents claimed to read the *Asahi Shimbun* when

they were actually reading the *Yomiuri Shimbun*. The *Yomiuri* suit was rejected in court, but similar legal problems have occurred at other times. This is another reason why interest in readership surveys is relatively low in Japan.

As many as 30 to 40% of respondents may be careless in giving answers because they are too busy. In Japan, it is customary to present a token gift for 'the trouble taken.' At MMR, a towel may be given, while at ACR, a ballpen may be presented. Such gifts are looked upon as a gesture of thanks for the information given. They may range in value from one US dollar or 10 dollars, depending on the social or professional position of the person interviewed.

Most survey workers are housewives or retired men. There has been a sharp drop recently in the number of students working as part-time researchers because their reliability is questioned and also because they have come to reject such work as too demanding.

In Japan, full-time researchers are rarely used in conducting interviews except in cases where the respondent is in a top-level position. This may be a problem to be addressed in future.

The illiteracy rate in Japan is zero. In the case of MMR, an average of 20% of all respondents are unable to give answers. Of this percentage, 12% refuse to answer, 4% are absent temporarily, 1.5% have changed residence, 1% are absent for prolonged periods, 0.5% cannot be located, and the remaining 1% do not answer for various other reasons.

In ACR's case, the 'blank answer' rate averages 24.5%, breaking down into 8.3% refusing to answer, 7.3% temporarily absent, 4.9% changing residence, 2.5% impossible to contact, 1% unlocatable and 0.5% not answering for various reasons.

#### FUTURE ISSUES AND OUTLOOK

The major issues in the future will concern expansion of the media surveyed rather than questions of survey methodology. Thus, sample sizes will have to be enlarged and budgets will have to be established to cover these larger samples.

With respect to television, the *Nihon Keizai Shimbun* has formed a tie-up with Information Resources Inc (IRI) of the United States, and Scan-test will be conducted jointly from 1986.