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MEASURING SPECIAL MARKETS: THREE CASE STUDIES FROM THE UNITED STATES

INTRODUCTION

New terms are always creeping into our professional vocabularies. A recent entry is 'demassification', the process by which something big breaks up into many smaller pieces. It is what American society has been going through in recent years in response to changing demographics, lifestyles and attitudes.

One of the by-products of demassification is a consumer marketplace that has become increasingly competitive and complex as marketers target their products at smaller, more refined segments of the population.

Concurrently, demassification has extended to advertising print media. Publications have grown in number, shrunk in circulation size, and become more specialised, in their editorial focus.

In this environment, magazine audience research has taken on added importance. The syndicated studies which measure the general population are still the heart of our research data bases. But the accurate measurement of small market segments is more than these surveys can reasonably provide, either financially or methodologically.

Different research approaches are needed – and have begun to emerge in the United States in the form of single market studies. This paper will discuss three of these surveys:

– Mendelsohn – which measures the affluent market.

– JD Power – which surveys buyers of new automobiles.

– Simmons – which has studied business management executives.

US EXPERIENCE: A DIVERSITY OF APPROACHES

These studies reflect some of the non-traditional approaches that have been taken in measuring special markets:

– sampling – samples drawn from compiled lists of names instead of from the general population.

– data collection – mail surveys instead of personal interviews.

– sponsorship – both syndicated and media-sponsored.

– supplier – experience in media research or market research.

In each case, a cost-efficient research design was achieved, enabling the study to be implemented. But with each design came various trade-offs in such areas as sample representativeness, data collection and audience projections.

WHAT WE HAVE LEARNED

From these studies we have learned some valuable lessons about measuring narrow segments of the population.

Sampling

Using traditional probability sampling techniques in a small market is akin to looking for a needle in a haystack. A lot of time and effort (and money) is wasted in finding what you are looking for. The efficient sampling of selective markets can be achieved by alternative methods:

– scoring neighbourhoods and/or individual households on their likelihood of falling into the market and concentrating sampling efforts in these places.

– using compiled directories or lists of names as the sample frame and universe.

– the latter method is very direct and cost-efficient. But it has limitations that can affect sample representativeness:

– the list may not be comprehensive. Some parts of the market may be excluded either systematically or randomly.

– there may be biases in the methods used to compile the list that produce inaccuracies. And since these lists are put together by third parties, we have no control over the compilation process.

– if the list is the universe, than population estimates and projections to the universe are also affected by list inaccuracies.

Data collection

Our experience with single market studies has indicated that mail surveys are a viable alternative to personal interviewing. However, this choice also has its own set of advantages and disadvantages:

– mail questionnaires are less expensive so more interviews can be attempted for the same amount of money. This aids statistical reliability of results.

– compiled lists contain names and addresses, facilitating a mail survey.

– completion rates are generally lower with mail questionnaires than with personal interviewing.

– some control over respondent selection may be forfeited with a mail survey.

– less information can be collected from mail questionnaires. But because a selective market is being measured, questions can be more directly targeted and questionnaire length can be reduced.

Research vendor expertise

We have also learned that market research companies, by virtue of a specialist expertise in a market, may be equipped to implement a credible media study – and do it better than a media research company.

The following sections will review and discuss keys aspects of the methods and procedures used by Mendelsohn, Power and Simmons within the context of the market being measured.

MENDELSOHN: MEASURING THE AFFLUENT MARKET

Background

The attractiveness of the affluent market is obvious: it is a concentrated group with significant purchasing power. In the United States, persons living in households with annual incomes of $50,000 or more are about 20% of the population; take home about 50% of the aggregate income and hold about 65% of the discretionary income.

This group is not homogeneous. Many different lifestyles, purchasing patterns and readership preferences are represented. In recent years, there has been a proliferation of new magazines targeted at this segment. The editorial thrusts reflect the diversity of affluents' interests and lifestyles-travel, business, personal finances, food, shelter and more.

The first problem in measuring this market is defining it. What is 'affluence'? Three current syndicated studies in the United States each use a different criterion:

– household income of $50,000 or greater
– top decile of household income
– purchase behaviour.

Each definition has some degree of arbitrariness. Why $50,000 instead of $60,000? Why the top decile instead of the top quintile? What types of purchases denote an affluent lifestyle? Of the three, the fixed income level has gained the widest support. Mendelsohn Media Research (MMR) is the vendor using this approach. The next section provides a methodological overview of the MMR study. It will be followed by a discussion of some of the major issues raised by these procedures.

Methodological overview

Sampling procedures

MMR conducts an annual survey by mail among some 24,000 adults with estimated household incomes of $50,000 or higher. The sample is drawn from a list of 78 million unduplicated names and addresses compiled by Donnelly Marketing. This list represents about 86% of all US households.

The sample is the result of a probability screening and selection process which uses Donnelly's 'Family Income Detector' (FIND) formula. FIND is a statistical prediction of individual family income. The prediction is based on a multiple regression analysis of information about the individual household and its neighbourhood. The former includes data about automobile ownership, type of housing unit, and length of residency. The neighbourhood profile is based on over 200 variables related to income from the 1980 Census conducted by the United States Government. All of this information is in the public domain.

The FIND formula is applied to each record in the data base. The result is a predicted income for each household. Those families which are predicted to make the $50,000 cutoff become the sample frame. A random sample is then drawn.

MMR surveys one pre-designated adult per household. Selection is hampered by limitations of the Donnelly file. Most of its listings carry a title – such as Mr, or Mrs, or Dr and/or a name. The vast majority are for the male head of household. MMR uses different sampling rates within the female listings and male listings to come up up with a final sample with the proper sex split.

Completion rates for the 1987 MMR survey were as follows:

		%	%
Total mailing	24,000	100.0	
Total deliverable	22,006	91.7	100.0
Completions	13,263	55.3	60.3
Answered income question	11,777	49.7	53.5
Income of $50,000 +	7,906	32.9	35.9

Data collection procedures

MMR uses a closed end, 16 page questionnaire with two rotations of the magazine list. The questionnaire is sent out with a cover letter, return envelope, and a $5.00 cash incentive. Three follow-up mailings are made to non-respondents at various intervals.

The magazine section includes 85–90 titles, grouped by editorial type and arranged within publication frequency. The frequencies – weekly, monthly, etc – are labelled; the editorial groupings are not.

Two screen-in questions are used. Readership is established by claimed frequency of reading. The number of projected respondents at each frequency level is multiplied by a probability weight and these products are summed to arrive at average-issue audience.

Claimed frequency	Weight
1 of 4	.25
2 of 4	.50
3 of 4	.75
4 of 4	1.00

Audience projections

MMR develops its universe estimates from data collected and provided by the US Bureau of the Census, the only viable source of national population statistics. In addition to a complete census undertaken every ten years, the Bureau also conducts annual surveys of 55,000 to 60,000 homes designed to update the decennial statistics. These surveys are issued under the title *Current Population Series* (CPS).

A comparison of the 1980 national census with the CPS survey from that year showed significant differences in the population projections for household income.

Indices

	CPS survey	National Census
$50,000 +	100	113
$75,000 +	100	131

On the basis of this discrepancy, MMR makes proportional adjustments to the CPS figures when developing its universe estimates. MMR balances and weights its in-tab sample against 144 discrete population targets and projects to the full affluent market. It also places limits on the range of weights used.

Commentary on samplng procedures

The MMR sampling plan is made possible only by the availability of detailed, comprehensive and relevant records about individual families and their neighbourhoods. By using a compiled list of names to develop a sampling frame, MMR significantly improves sampling efficiency, thereby reducing costs.

The $50,000+ income market represents 20% of the US population. With simple random sampling techniques, a sample of 100 persons should yield 20 with the requisite income. In the 1987 MMR study, 67% of the respondents reported household income of $50,000 or more. So the same 20 in-tab respondents are found with an initial sample of 30 homes. This also shows that the income prediction formula has a good success rate.

However, the improvement in sampling efficiency comes at the expense of sample representativeness:

- the Donnelly file omits 14% of US households. There is no systematic pattern to the omissions. These families have no chance of falling into the sample.

- the FIND model has an older and upscale bias. It favours older, wealthier and better educated persons. Younger families, particularly those in urban areas who rent their dwellings, are more likely to be incorrectly excluded from the sample frame.

- respondent selection procedures have biases. There is a sex imbalance in the Donnelly file favouring the male head of household. As a result, the sex pre-designation is not purely random - it is affected by the listings.

- about 11% of the respondents completing the questionnaire choose not to answer the household income question. Of course, their answers cannot be included in the survey results since income is used to define the market.

Of course, we do not know whether these sampling biases affect the survey results. But the potential for bias exists and it ties directly back to the sampling frame. A frame developed from a compiled list is only as complete and as unbiased as the list itself. An obvious statement, but one worth remembering.

Commentary on data collection procedures

There are two broad areas to discuss:

(1) Mail survey versus personal interview.

(2) The magazine readership questions.

Let us take them in order.

The premise for surveying affluent persons by mail is that a sizable proportion of this target group is inaccessable or unavailable for personal interviewing. This problem generally worsens as income increases. Mail surveys offer the best opportunity for obtaining a representative sample from this market.

The fact that sample recovery rates decline as respondent income increases is well known. In the United States, the evidence is found in the general market readership studies conducted by Mediamark Research (MRI) and Simmons Market Research Bureau (SMRB). These organisations stratify their samples by household income and over-sample the upper segments to get the desired number of in-tab respondents. The difference in completion rates between the richest and poorest strata is generally 10 to 15 percentage points.

Mail surveys do have limitations. Recovery rates tend to be lower than what might be expected with personal interviewing. That is the inevitable product of shifting responsibility for interview completion from the research vendor to the respondent. Does this introduce a non-response bias? We do not know.

Is there a tendency for respondents to over-claim or underclaim their income? If so, is the problem lessened or heightened by use of a mail questionnaire? One school of thought argues that with no interviewer present, it is easier for a respondent to inflate his or her income. The

counter claim is that with no interviewer present, there is no one for the respondent to impress with claims of wealth, so why bother to overstate income? Only an audit of respondent income can settle this debate.

Mis-statement of income is most likely to arise from the use of an open-ended income question or from a closed-end question that specifies narrow income ranges. As income increases, this becomes a greater problem because salary income dividends – interest, capital gains – will represent a larger share of gross-income. Most people can probably remember what their employment salary is, but how many can accurately recall non-wage income?

To reduce the potential for income mis-statement, MMR uses very broad ranges:

$50,000 - 59,999	$100,000 - 149,999
$60,000 - 74,999	$150,000 - 199,999
$75,000 - 99,999	$200,000 and over

In summary, both mail surveys and personal interviews have inherent biases that affect the accurate measurement of affluent persons. The trade-off is clear. Mail surveys get a lower overall recovery rate in exchange for sampling a broader spectrum of the market. Both aspects relate to the issue of sample representativeness. But you cannot measure that which you do not sample. For the affluent market, where discretionary income (and importance to marketers) increases in tandem with gross income, this argues for using the mail technique.

The second area to discuss is the collection of magazine readership data. The use of a mail questionnaire virtually dictates that audience estimates be collected via claimed frequency of reading. And that is how MMR does it. How-

ever, MMR does not show magazine logos on the questionnaire. Use of logos in mail surveys has been gaining popularity in the United States.

Another feature of the questionnaire is the grouping of magazines within editorial categories, even though the groupings are not labelled. This has also become a common approach in the US with mail questionnaires. The belief is that it helps recall by getting the respondent to think about *types* of magazines prior to answering for specific titles.

In all, the MMR readership questions appear to produce logical audience levels and compositions.

One final subject worth noting is the use of premiums. In 1986 MMR tested two different premiums. A $2.00 premium achieved a response rate of 47.6% versus 58.7% for a $5.00 premium. So even affluent people respond to extra money!!

Commentary on audience projections

Developing universe estimates is often regarded as one of the easier tasks in readership surveys. However, these estimates will only be as good as the source(s) from which they are obtained.

The CPS figures that the US Bureau of the Census turns out are not completely reliable when it comes to the affluent market. The CPS is a sample of the total population and becomes thin at upper income levels. In addition, income data are incomplete for about 30% of the households surveyed. These missing data are ascribed.

The discrepancies between the CPS survey and the complete national census argue in favour of adjusting the CPS statistics – which MMR does.

This points to the need to examine the reliability of the source used to develop the universe estimates.

With respect to sample balancing and weighting, another consideration arises: whether to place limits on the weights used. In the MMR study, the Donnelly sample frame has an upward income bias while the CPS figures have a downward bias. This exaggerates the differences between the in-tab sample and universe estimates, requiring larger weights. But the danger of large weights, especially when applied to small sample cells, is the introduction of large and artificial swings in audience estimates from year to year.

The lesson is clear: do not underestimate the importance of good, reliable universe estimates. And remember that a source which works well for general population statistics may hold up as well for smaller, selective market groups.

J D POWER: MEASURING NEW CAR BUYERS

Background

In 1986, over 11.4 million new passenger cars were sold in the United States. But the single most popular model accounted for only about 3% of the total. This illustrates the fragmentation of the automotive market.

It is a market undergoing dynamic changes. Domestic manufacturers face increased competition from new import models and from the US assembly of import nameplates. The import glut is expected to continue as more foreign manufacturers, faced with declining profit-ability in other world markets, turn to the United States. And the Japanese dominance of import model sales is under attack as a result of currency appreciation, import quotas, and competition from Korea.

With increased competition, automotive advertisers are looking to spend their money more efficiently. Magazines will continue to play an important role in marketing campaigns because of the medium's ability to reach specific consumer segments. In 1987, US magazines took in $473 million in passenger car advertising making it the top revenue category.

The general market readership surveys are not capable of providing the accurate measures that automotive marketers require. Less than 7% of the adult population buys a new car during the year. Sample sizes are too small to match magazine readership with recent car purchasers. Print evaluations are therefore based on the less direct measures of demography.

Into this void came J D Power, a market research company specialising in the automotive field. It developed a research study specifically to measure magazine readership among principal drivers of recently purchased new cars. The underlying premise is that reading habits of *recent* buyers are predictive of prospective buyers. First conducted in 1985, Power published a second study in 1987 and plans to conduct annual surveys hereafter.

The next section provides a methodological overview of the 1987 Power study. It will be followed by a discussion of some of the major issues raised by these procedures.

Methodological overview

Sampling procedures

J D Power conducts a survey by mail of 66,000 persons who are the principal drivers (as opposed to purchase decision makers) of new

passenger cars that have been bought for personal use within the past twelve months. The sample frame is a compiled list, obtained through state governments, of *all* new autos registered by individuals. The frame is in fact a census.

All of the records specify the make and model of the car. About 86% of the records also have the name and address of the person in whose name the auto was registered. The sample is drawn from this subset. The other 14% of the records all come from twelve of the fifty states where governments do not release names and addresses.

Power puts each car model into one of 16 discrete classfication segments. These groupings represent competitive brand sets. Sample quotas for each segment are established and random 'nth' name samples are drawn. The objective is to have 1,200 in-tab respondents per segment and at least 30 segment respondents per magazine.

The overall recovery rate for the 1987 survey was 50.8%. Within the 16 sampling segments, completion rates ranged from 39% to 62%.

Data collection procedures

Power uses a 12 page, closed-end questionnaire with 16 different rotations of the magazine listings. It is mailed out in two semi-annual waves and is addressed to the registrant of the car. The cover letter and questionnaire both ask that the 'person who most frequently drives the new vehicle' answer the survey. A $1.00 cash incentive is included in the first mailing. Non-respondents receive a reminder phone call and follow-up mailing.

The magazine portion includes 110-115 titles with logos printed on the questionnaire. Publications are grouped by editorial type and arranged within issue frequency. The frequen-

cies – weekly, monthly, etc – are labelled; the editorial groupings are not.

A six screen question is used. Readership is established by claimed frequency of reading. The number of projected respondents at each frequency level is multiplied by a probability weight and these products are summed to arrive at average-issue audience:

Claimed frequency	Weight
0 of 4	.00
1 of 4	.25
2 of 4	.50
3 of 4	.75
4 of 4	1.00

Among the other questions on the survey is one to identify the make and model of the respondent's auto. Power already has this information from the registration records this question serves as a check.

Audience projections

Universe estimates come from the full, compiled list of auto registrations, which is a complete census of the market. Survey results are weighted on an individual car model basis and projected to the total United States. In addition, magazine audience estimates are circulation adjusted to compensate for the twelve states missing from the sample frame. Power uses a ratio method that assumes equal readers-per-copy in the survey and non-survey areas.

Commentary on sampling procedures

J D Power has defined a market in terms of consumer behaviour, not demography. That alone

separates its study from many other readership surveys. Power has developed a sampling plan that is both cost efficient and statistically efficient. Because the market is small and because the sampling frame is a census, Power can easily work backwards from a desired level of reliability for readership estimates to arrive at in-tab goals and sampling rates within each of the sampling strata.

Sample representativeness is also maintained, with almost none of the potential biases that are present in Mendelsohn's affluent market study. Though 12% of the car registrants are excluded from the sample frame, their geography is known (unlike Mendelsohn, where omission is random) so adjustments to the audience estimates can be made based on circulation delivery within the survey and non-survey states. In addition, the sampling frame covers a full year, so there is no seasonal bias. This is an important consideration for the automotive market.

Respondent selection also works smoothly. There is no inherent sex bias in the registration listings. It could also be argued that 'principal driver' is a less actionable marketing target than 'purchase decision maker.' However, the Power questionnaire asks the respondent if he or she is also the person 'most influential in the decision to buy this new vehicle.' The overwhelming majority answer 'yes'.

The most significant weakness in the sample is the completion rate. At 51% overall, it is acceptable. But it drops much lower in some of the strata. On the positive side, the in-tab counts are large enough to support audience estimates for small targets.

Commentary on data collection procedures

As with Mendelsohn's affluent market study, the issue of mail survey versus personal inter-

view is also relevant to the J D Power study. For Power, the concern is not accessibility of new car buyers: it is the large sample required to get statistically reliable audience estimates within narrow market sub-segments. Mail is the only cost-efficient way of surveying 65,000 people.

Two aspects of the Power questionnaire that differ from Mendelsohn's are the use of printed magazine logos and, sixteen rotations of the magazine section (versus two). Both of these are positive features.

Finally, given the absence of twelve states from the sample frame and the fact that Power is projecting audiences to the total universe of new car buyers, the ratio adjustments that Power makes are necessary and appropriate. That adjustments can be made points to the fact that both the sample frame and audited circulation statements can be broken down by identical geographic areas.

Improvements from the first Power car study

It is worth noting that the first Power car study, conducted in 1985, had several major methodological flaws. Among them:

– sample drawn from only two months of auto registrations but survey results projected to the full year;

– no screen-in question or logos used for magazine readership;

– limited follow-up procedures. This contributed to the relatively low completion rate of 45%;

– audience estimates not adjusted to reflect circulation in the non-surveyed states;

– several publications that are heavily utilised by automobile marketers were omitted from the study altogether.

The errors in the first study offer a valuable lesson in what can happen when a research company leaps before it looks. Power's background and expertise is marketing research. The 1985 car study was its first foray into media research. It applied marketing research practices and principles to a media-based study and did not consult media research professionals. The results were disastrous and the survey was widely criticised – and sparsely used – after its release.

But give credit where it is due. Power listened to its customers and collaborated with persons knowledgeable about magazine readership surveys. The improvements are reflected in the 1987 study.

Our experience with J D Power has taught us that the measurement of special markets can sometimes best be done by a market research supplier specialising in a particular field. But because these companies may not be familiar with *media* research techniques, extra care is required to ensure a high quality study.

GOING TO THE OFFICE: THE SIMMONS BUSINESS MANAGEMENT STUDY

Background

Over the past few years, business-to-business advertising has grown rapidly within the United States. Such categories as office equipment, data processing, telecommunications and delivery services have experienced enormous growth as advertisers have expanded their print advertising efforts beyond trade publications and into targeted consumer magazines. During this period, many new business publications have been launched, each offering its own editorial niche.

The general readership studies have not been adequately able to meet the need for informa-

tion about this market. Many of the new publications have small, targeted circulations and therefore get insufficient sample sizes and unreliable audience estimates in the mass market surveys. Many business-to-business campaigns target upper management, the people who have purchase-decision responsibilities. This selective group is equally difficult to measure.

In 1984, Simmons Market Research Bureau was commissioned by *Dun's Business Month* to undertake a media and marketing study of business management. In 1986, *Industry Week* joined *Dun's* to sponsor a second survey, also conducted by Simmons. And earlier this year, Simmons announced its 1988 study of this market would be syndicated and made available to all interested parties.

At the of writing, the 1988 study has not yet been completed. Therefore I will discuss the 1986 management survey. The next section provides an overview of the methodology and is followed by commentary on some of the major issues raised by these procedure.

Methodological overview

Sampling procedures

Simmons conducted a survey by mail among business executives. The universe for this study was defined as individuals employed at a management level in US-based companies with 100 or more employees *and* sales of $10 million or more.

The sampling frame was separate lists compiled by two companies specialising in business information: Standard & Poors and Dun & Bradstreet. After screening against the universe criteria, the lists contained approximately 45,000 corporations with the names, titles and function of officers, directors, and other principals. Data on number of employees and sales revenues were also available. The lists were merged and duplicate entries purged

so that each element could only come into the sample from a single list. A total of 191,235 persons were eligible for selection.

A random 'nth' name sample of 4,000 was drawn from the frame. Subtracting post office returns and invalid respondents, the eligible sample was reduced to 3,124. Of these, 1,619 completed questionnaires for a response rate of 51.8%.

Data collection procedures

Simmons used an eight page, closed-end questionnaire with two rotations of the magazine listings. It was mailed to the business address with a cover letter and $2.00 cash incentive. Two follow-up mailings were made to non-respondents.

Eighteen magazines were measured. Readership data were collected using six-month screen-in and claimed frequency of reading questions. Black and white logo reproductions were shown on the questionnaire for each publication. There was no sorting of titles by issue frequency or editorial type.

A 'Through-the-Book' estimate of average issue audience was derived by applying a calibration factor to the sample probability weights for each of the claimed frequency levels.

Claimed frequency	Probability weights		
	Factor	Theoretical	Final
< 1 of 4	.714 x	.125 =	.089
1 of 4	.714 x	.250 =	.178
2 of 4	.714 x	.500 =	.357
3 of 4	.714 x	.750 =	.536
4 of 4	.714 x	1.000 =	.714

Audience projections

The universe was defined as the sample frame so all population estimates came directly from the latter. Survey results were weighted and projected within 35 cells relating to number of employees and sales volume.

Commentary on sampling procedures

Developing an efficient and comprehensive sample frame for 'Top Management' is much more difficult than for the other markets we have discussed. Income and car purchasing are 'hard' measures that are simple to define. A direct, straighforward market definition, in turn, can enhance development of a good sampling design.

Job title and position within a company are 'soft' measures that are more difficult to define and survey. It becomes a harder task to generate a representative sample of the market. This problem is endemic to any attempted measurement of the 'Top Management' market.

The screening criteria that Simmons used (number of employees and sales volume) and the respondent selection process (directly sampling names, rather than first sampling companies) both have a 'big business' bias. Over 160,000 companies were present in the master list used to develop the sample frame; only 45,000 passed the screen. Large companies are more likely to have more people listed in the directories. Not coincidentally, the circulation and readership of the two publications that sponsored the 1986 study skew towards larger sized companies. That speaks eloquently about the need for non-sponsored, syndicated surveys.

The Standard & Poors and Dun & Bradstreet directories both have significant biases that affect sample representativeness. The listing are generaly limited to headquarter locations,

excluding branch offices. Thus many executives who might be actively involved in business purchase decisions have no chance of being included in the study. The fluid nature of the market – job positions being filled by new people – makes it impossible to have a current and complete list of names. Standard & Poors says it makes over 600,000 revisions every year in its data bases, testimony to the volatility within the business market. This may help explain the fact that Simmons had to disqualify over 10% of the completed questionnaires because respondents answered that their company had *fewer* than 100 employees.

The recovery rate (51.8%) also points to the difficulty of getting executives to respond to a mail survey that is received at the office. These people, by virtue do their job positions, are busy. Is it realistic to expect that a large proportion will take the time to complete a questionnaire?

Commentary on data collection procedures

The frequency of reading measurement that is typical of mail questionnaires is given a unique twist by Simmons with the use of a calibration factor to bring audience estimates in line with 'Through-the-Book' levels. The origin of the calibration factor is an industry-sponsored comparability study done in 1981 to reconcile differences between the 'Through-the-Book' and 'Recent Reading' methods. As the leading proponent of 'Through-the-Book,' Simmons apparently feels the need to be consistent.

The 1986 Simmons study measured only 18 magazines. The 1988 study will survey 31 publications. By contrast, Mendelsohn's affluent market study measures 80-85 titles; the J D Power automobile study has over 100 books. The relatively small number of magazines reflects the business-to-business orientation of the survey and the fact that fewer

consumer books target this market. But the inclusion of only 18 titles in the earlier study also reflected the self-serving interests of the two business publications that commissioned the study.

SUMMARY

The consumer marketplace continues to fragment in response to changing demographic, lifestyles and attitudes. Concurrently, advertisers are targeting their products at smaller, more refined population groups. And in an effort to reach these new and growing markets, the print media have expanded in number while becoming more specialised in their focus.

In this environment, magazine audience research takes on added importance. However, the broadly based readership studies are inefficient at measuring narrow segments of the total population. Different research approaches are needed – and, in the United States, have begun to emerge in the form of single market studies.

These studies have used non-traditional approaches to measure markets as diverse as automobile purchasers, business executives and the affluent. In each case, a cost-efficient research design was achieved, enabling the study to be implemented. But with each design came various trade-offs in such areas as sample representativeness, data collection and audience projections.

From these studies we have learned some valuable lessons about measuring narrow segments of the population.

– samples can be efficiently drawn through the use of compiled lists of names of people.

– all lists are not created equal. The representativeness of a sample drawn from a list is affected by the comprehensiveness of the list

(ie, coverage of the market) and biases in the list compilation process.

– even with a targeted sample selection process, completion rates are still lower with mail questionnaires than with personal interviewing.

– compiled lists contain names and addresses, facilitating a mail survey. Since mail questionnaires are less expensive, more interviews can be attempted for the same amount of money, aiding statistical reliability.

– mail questionnaires are less expensive so more interviews can be attempted for the same amount of money. This aids statistical reliability of results.

– market research companies with a specialist expertise in a market may be equipped to implement a credible readership study. But their unfamiliarity with media research techniques means that our advice and input is essential to help produce a high quality study that meets our needs.