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## THE IDEAL SURVEY - AND UNTIL THE IDEAL SURVEY

### SYNOPSIS

Human beings make mistakes when answering survey questions, and as a result, media research is an inexact science.

In developing the ideal survey therefore, we must either eliminate the sources of error in the equation - human beings - or simply outsmart them.

Ultimately, passive electronic measurement systems could in fact eliminate survey respondent errors. However until such an alternative becomes economically viable, we are left with minimising the effects of human error and inconsistency. In a system built on a questionnaire, respondents, interviewers and researchers, the 'ideal' survey will be less than perfect.

The authors contend The Roy Morgan Research Centre's (RMRC) 'composite' measurement system which uses different approaches to measuring readership of newspapers, weekly magazines and monthly magazines, is in fact close to the ideal survey. In contrast, 'recency' based systems are, it is argued, far from ideal and produce wrong results.

Although the 'composite' system was first presented by Roy Morgan at the 1983 Montreal Symposium, through experimentation it has subsequently been further refined.

This paper discusses changes made to the system over the past eight years, along with experimentation on measurement of magazines inserted in newspapers ("through-the-book" vs "first-time-reading" vs "recency") and the use of color front covers for monthly and weekly magazines.

Although RMRC regards "through-the-book" as the benchmark with which other methods may be compared, RMRC has commenced development of a validation system based on "source of copy". The paper presents initial results on large circulating magazines which support RMRC's contention that its 'composite' system is close to the ideal; and the "recency" based systems produce wrong results which result in inflated readership estimates.

## THE IDEAL SURVEY - AND UNTIL THE IDEAL SURVEY

Thank you for inviting us to this conference to talk about the ideal survey.

As well as being interesting, this topic is very important - it is right at the heart of what we here today, are all involved in: information - information obtained from media research, and hopefully information which can be relied upon, and upon which it is safe to base decisions.

Media research is, of course, an inexact science. We, in the business of media research, spend a great deal of time discussing and arguing the merits or otherwise of various approaches.

One such discussion at The Roy Morgan Research Centre (RMRC) recently centred around "purity". We think the issue was actually something which would have been better described as "consistency" - the notion being that consistency of method somehow provided purity. Unfortunately in this business of research - especially where human beings are involved - such a notion is a fallacy.

People lie, they forget, they can't remember the options long enough to answer the questions, they forget the questions, they mix up dates, they "big note" themselves, they selectively forget. And they do all of these things inconsistently, wreaking havoc with our attempts to measure truth.

Moreover, different biases influence publications depending upon their frequency of publication.

The ideal survey therefore must either eliminate the sources of error in the equation - human beings - or simply outsmart them.

This leads to two possibilities.

Firstly, we could develop passive electronic measurement systems. Such systems would involve attaching an unobtrusive monitoring device to a sample of respondents. The device would detect pulses from transmitters attached to copies of newspapers and magazines.

This has been talked about before, and is very appealing. Although the technology is probably available, at this stage, the development costs and the ongoing costs for publishers would probably be too great.

With rapid advances in technology, a cost effective application of this ideal methodology may be only 10 years away. Who knows? It certainly isn't just around the corner.

For the moment then, we are left with outsmarting, or at least, minimising the effects of, human error and inconsistency.

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For instance:

For daily newspapers - the largest sources of error or bias are elastic memories (or telescoping) and prestige (which includes people claiming to have read, say, the more prestigious Sydney Morning Herald or Melbourne Age rather than the Sydney Telegraph or Melbourne Sun and, more generally, overestimating the regularity with which they read the paper, or respondents simply wishing to tell interviewers what they 'usually' do).

Other consumer research experience has shown it to be possible to overcome the problem of elastic memories by leading respondents backwards through time. In addition, the ill effects of prestige on the accuracy of survey data have been overcome by using printed lists of titles followed by a number (eg. The Sun...4) and having the respondent say the number rather than the title.

Based on this knowledge, the method adopted by RMRC to measure the readership of daily newspapers involves showing respondents a typed list of titles (not copies of the mastheads) with a number after each, and asking about yesterday's reading, then the day before, etc.

For weekly magazines the problems or biases associated with daily newspaper readership measurements are compounded by the additional problem of "replication" (which occurs with repeated reading of an issue of a publication by people who don't read every issue of that publication). This requires an additional filter or screen to be applied ie. "first-time-reading".

In the interests of "purity" or "consistency" it could be argued that the same screen should be applied to daily newspapers. Clearly that would not be only time consuming and unnecessary (few people repeat read old newspapers) but would also serve to confuse the respondent.

Confusion between titles (mistaking one weekly magazine for another) is another problem faced in measuring weekly magazine readership.

This is particularly problematic where several weekly magazines (such as news or business magazines) feature similar cover stories.

To overcome this problem it is necessary, in the case of some weeklies, to use a full "through-the-book" approach. (Truncated copies, as used in the USA and Canada, would give similar results as obtained by using front covers, which although adequate for monthlies, we have found to give incorrect results for weeklies.)

For monthly magazines which tend to have a much longer life than weeklies, "replication" is a major problem, and requires the use of a "specific issue" method to measure their readership levels. Experimentation over the years has shown that an accurate measurement (equating to the "through-the-book" method) is obtained by showing photo reduced front covers of the monthly magazines.

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Realistically, in a system built on a questionnaire, respondents, interviewers and researchers, the "ideal" survey will be less than perfect.

For example, if the "perfect" survey was a bullseye on a dartboard, in a questionnaire based system, the "ideal" might be a centimetre or two from the bullseye.

In Australia, The Roy Morgan Research Centre has, for over 20 years, been working towards that ideal. We are still working towards it, with an ongoing programme of experimentation and refinement.

Today I would like to tell you about some of the experiments we have conducted, and the progress we have made since the last time Roy Morgan (my late father) addressed this Symposium in Montreal eight years ago.

Currently, we believe the Australian National Readership Study is still about a centimetre away from the ideal on the readership survey dartboard.

For those who persist with "recency" questions to measure magazine readership, let me say, your dart hasn't hit the board yet. It's stuck firmly in the plaster at least a metre from the ideal.

Let me digress for a moment from readership measurement and give an example from another area - blank tape purchasing.

Congress of the United States' Office of Technology Assessment prepared a document called Copyright and Home Copying - Technology Challenges the Law.

This document focuses on the results of a survey which was developed by SRBI (Schulman, Ronca and Bucavalas Inc.), the Office of Technology Assessment (OTA), outside survey experts and advisers, and 20 further reviewers.

This document is considered a blue print for other studies of its kind. However, tucked away on P148 of the report in Note 18, is the following:

"The SRBI report includes an estimate of average annual purchases based on analysis of most recent purchases. In comparing their projection with actual 1988 sales, as reported by RIAA, however, SRBI finds their projection of 1,500 million purchases per year is too large by about a factor of 2. SRBI attributes this problem to recall error and applies a 100 percent correction factor to develop what they consider a more reasonable estimate: 750 million purchases per year."

Telescoping with a recency frequency method strikes again!

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As you all sit back in your seats thinking that you've heard all this before, let me make the point. I know the "recency" versus "first-time-reading" and "through the book" argument has raged for over a decade. I'm sick of it too.

But now with multi-media becoming a reality (we now have the research instruments, technology and know how) we need readership estimates which are close to reality rather than relatively correct within publication types or within media types.

The need is for accountability - not sterile arguments about methods - their advantages and disadvantages, intuitive logic, or inherent value - the need is for real tests.

Whoever is the **first** to claim they have an ideal survey, however, will have to **validate** their claim.

We at The Roy Morgan Research Centre (RMRC) say **validate**, because until sophisticated passive measurement systems arrive, no one will ever be able to **prove** their readership results are "right".

There can be no argument with using the "through-the-book" method for this validation. "Through-the-book" is the **most accurate** method of measuring readership. It represents the "benchmark" against which all other methods can be checked, and which all other methods must seek to simulate.

In addition however, further to work presented by many others at previous Symposia, RMRC has recently commenced developing a validation system. This is based on 'source of copy' questions. Although we are only at an early stage, we have already found some encouraging validation evidence for our survey methods.

Before discussing our experimentation, I'd like to introduce briefly the RMRC approach to, and philosophy about, measuring readership.

### **The Current Australian National Readership Survey**

Each year RMRC conducts the Australian National Readership Survey\* using door-to-door interviews with approximately 29,000 men and women aged 14 years and over. Survey results are published twice yearly using a rolling 12 month average.

All of the major publishers and advertising agencies have, for many years, subscribed to our survey. Until a few years ago, one of RMRC's competitors, AGB McNair, conducted a readership survey using a "recency" method similar to that used in the U.K.

However logic and commonsense told the Australian market-place the higher "readers per copy" figures produced by that system could not be right. Faced with lack of belief in their data and a rapidly diminishing list of subscribers, AGB was forced to close the doors on its readership survey.

\* In New Zealand The Roy Morgan Research Centre has now completed their first New Zealand readership survey based on approximately 5,000 personal interviews.

Through experience and extensive experimentation, we believe door-to-door interviewing is still the most cost effective approach to simultaneously collecting magazine and newspaper readership information on an extensive list of titles. This is because only face-to-face interviews can simultaneously and adequately allow for problems such as "telescoping", "replication", "prestige" and "title confusion".

Further, as mentioned, RMRC assumes the "through-the-book" method produces the most accurate readership estimates for magazines. However, it is cumbersome and expensive, and therefore we have developed (and continue to refine and improve) a "composite" method for readership measurement, which cost effectively simulates "through-the-book" results.

RMRC interviews on weekends administering a questionnaire with the following overall structure:

- . **For Daily Newspapers:** using a typed list (not mast-heads) on a showcard, we ask respondents about their reading of daily newspapers on Friday, and progressively take their memories back in time, day-by-day, through the rest of the week.
- . **For Saturday, Sunday and Weekly Newspapers:** respondents are shown a card listing the Saturday papers and asked about their reading in the last 4 weeks and the last 7 days. (The question on reading in the last 4 weeks is merely a "filter" which we use to reduce claims caused by "prestige".) An identical approach is then used for Sunday and weekly papers.
- . **For Weekly Magazines:** most of the weekly magazines are measured using the "first-time-reading" method. This is because we've found for most titles, "first-time-reading" adequately simulates "through-the-book" results.
- . **For Monthly, Bimonthly and Quarterly Magazines:** Respondents are shown high quality color photo-reductions of magazine front covers (three to a card) and asked about their reading of those specific issues which, for monthlies, are mostly 10 to 12 weeks old. As early as 1970 RMRC found, due to the effect of "telescoping" and "replication", monthlies could only be measured reliably using specific issue recognition.

RMRC has now established a national readership survey in New Zealand using an identical methodology. In the not too distant future, RMRC hopes to be establishing similar surveys in other countries.

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### Changes Since 1983 and Experimentation

RMRC continues to experiment because:

- i) There is always room for improvement,
- ii) The market changes, eg. magazine inserts in newspapers, introduction of color in newspapers,
- iii) Consumer habits may change. Our opinion polling shows consumer attitudes and behavioural responses to issues change over time. A responsible media researcher needs to check basic assumptions on an ongoing basis, and
- iv) Technology changes - inexpensive color copying makes the use of color in showcards a cost-effective option.

(a) Weekly Magazines - from "Recency" to "First-Time-Reading"  
(Tables 1&2)

Prior to 1984, RMRC measured weekly magazines using the "recency" method (read any issue in the last 7 days).

However in January 1983, when Australia's largest magazine, Australian Women's Weekly, changed from a weekly to a monthly publishing cycle, it became obvious the "recency" method had been **overestimating** the readership of weekly magazines.

At the time we could not understand this, because many years before we had conducted experiments on weeklies using "recency" and "through-the-book", and obtained very similar results.

Nevertheless, during 1983, experiments showed a good deal of "replicated" reading was occurring with weekly magazines and so, in 1984, after consultation with publishers and agencies, RMRC adopted "first-time-reading" for weeklies. As shown in Table 1, when compared with "recency", this reduced "readers per copy" levels for large and medium circulation weeklies by about 25%. "Readers per copy" levels for the small circulating news/business weeklies decreased by around 35%.

We had learned an important lesson. Consumer habits change, and because of this, what works at one point in time may not work later. Although "replication" had not been a significant issue for weeklies in 1970, it certainly was in 1983. Therefore periodically, it was important for RMRC to check that the composite system continued to effectively simulate "through-the-book".

During 1986 and 1987 RMRC conducted extensive "through-the-book" experiments. As shown in Table 2, this verified that for large circulation weeklies, "first-time-reading" was, overall, effectively simulating "through-the-book".

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It appeared however that readership of small circulation news/business weeklies was being under reported. Therefore, again in consultation with publishers, measurement of the news/business magazine category was moved to a full "through-the-book" method.

(b) Newspaper Inserted Magazines (Table 3)

For the past two or three years, readership of magazines distributed free with newspapers, has probably been the most contentious issue in Australian print media research.

It is RMRC's contention that because these inserted magazines are magazines, and compete with "stand alone" magazines for the same advertising dollar, their readership should also be measured in the same way as a magazine.

The largest and most well known of these, Good Weekend (distributed weekly with Saturday's Sydney Morning Herald and Melbourne Age) and the Australian Magazine (distributed nationally each week with the Weekend Australian) have been measured using "through-the-book" since their launch in 1985 and 1987 respectively.

When the readership of these newspaper magazines is expressed as a ratio of their host newspaper readership, the RMRC readership survey shows a ratio of about 50%. (The data also shows, however, these magazines have a life of their own. Between 25% and 40% of their readers do not read the host newspaper).

Inserted newspaper magazines are simply like another section of the paper. It's not surprising therefore, that not everyone who reads the paper reads the magazine. It's well known for example, that many people read the Saturday papers like the Sydney Morning Herald and The Age only for the classified advertisements.

Yet, publishers of these titles, particularly The Australian Magazine, have been extremely critical of the RMRC readership figures for inserted newspaper magazines.

One of them cites UK readership figures which credit many inserted newspaper magazines with audiences equal to, or even greater than their host newspapers. Based on this "evidence", they choose to use the readership of the host newspaper instead of the magazine when selling advertising space.

To do this is clearly wrong for two reasons:

- i) Given the significant difference in the size and quality of many UK inserted newspaper magazines with similar Australian newspaper magazines, we would expect UK newspaper magazines to generate higher readership in real terms, and

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- ii) Nevertheless the UK readership methodology uses a "recency" approach to measuring all magazines. From RMRC experimental research, and evidence presented by many others at previous Symposia, we **know** "recency" produces **inflated** readership figures for magazines - whether they be newspaper magazines or not.

RMRC has experimented with a number of approaches to measuring inserted magazines, using both door-to-door and telephone surveys.

Table 3 presents findings from surveys conducted in February and May 1990, and compares the results with the most recently published RMRC standard survey figures at the time (12 months to March 1990).

The experiment involved showing respondents a card listing Saturday papers and magazine inserts. The order of presentation was rotated, but newspaper magazines were always listed **directly below** their host newspaper.

Respondents were asked which of the newspapers and their magazine inserts they had read or looked into in the previous four weeks, and in the last seven days.

Respondents who claimed to have read or looked into a magazine insert in the previous seven days were then asked how many **different** issues they read or looked into, and for each issue, whether or not they had read it for the **first** time in the last seven days.

This approach enabled both "recent reading" and "first-time-reading" estimates to be obtained for magazine inserts.

A comparison of the experimental "recent reading" results with standard "through-the-book" results shows an increase in the newspaper magazine to host newspaper ratio from 50% or 57% to about 75%.

Therefore even by simulating the UK "recency" approach, we did **not** obtain ratios of 100% or higher.

By qualifying the "recent reading" responses with "first-time-reading" questions, newspaper magazine to host newspaper ratios of around 66% were obtained.

We concluded there is absolutely **no justification** for publishers to use host newspaper readership levels to represent the readership of inserted magazines.

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Due to "replicated" and "parallel" reading, "recency" estimates are incorrect. Therefore as shown by the "first-time-reading" results, at most, these newspaper magazines have magazines to host newspaper ratios of around 66%.

However, as shown in Table 3, even the more conservative "first-time-reading" method produced inflated estimates in relation to the "through-the-book" benchmark. We believe the tendency to associate the newspaper magazine with the host newspaper, regardless of whether or not the newspaper magazine was actually read "last week", leads to inflation due to "prestige".

Because of this, we will continue to use "through-the-book" for these newspaper magazines until a means of simulating "through-the-book" can be identified.

It's important to note however, that depending on the nature of the magazine and the newspaper in which it is carried, the ratio of magazine to host newspaper readership can vary significantly. For example, in New Zealand, RMRC has conducted two independent studies on the NBR Magazine which is inserted in the Friday issue of New Zealand's national business daily newspaper, National Business Review. These studies showed that not only is readership of the host newspaper significantly higher on Friday than on any other day, but that the ratio of magazine to host newspaper readership was in excess of 90%.

(c) Monthly Magazines - From Black-and-White to Color (Table 4)

Since the early 1970's until recently, RMRC measured readership of monthly, bimonthly and quarterly magazines by showing respondents photo-reduced black-and-white front covers of specific issues.

We believed, ideally, that standardised color front covers should be used for all titles. This was because color front covers would improve respondent recognition of specific issues, and aid in reducing possible confusion between similar magazines. Color front covers would also make the interview more enjoyable for respondents.

It was not until recently, however, that a cost effective way to produce high quality color showcards in relatively small quantities became available.

Therefore commencing May 1990, showcards for monthly, bimonthly and quarterly magazines were progressively converted to color.

Table 4 presents readership levels obtained for a range of titles surveyed with color front covers in the five months May to September 1990. Comparisons are provided with the latest published survey results at the time (12 months to March 1990).

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Overall, given the month by month fluctuations possible when measuring specific issues, the color cover results were in most cases very similar to those obtained when using black-and-white covers.

The reduction in readership levels for Family Circle and Better Homes and Gardens is in line with their reduced circulation, and reflects a real reduction in readership over the two survey periods; (rather than a change due to methodology).

With color front covers, the relativities between two very similar magazines for young women, Cleo and Cosmopolitan, have moved closer together (and more in line with their circulation relativities).

(d) Color Front Covers for Weekly Magazines (Table 5)

As mentioned earlier, since 1984 RMRC has been measuring readership of most weekly magazines using "first-time-reading". Weekly business and current affairs magazines (Time, Bulletin, BRW and Australian Business), along with the newspaper inserted magazines, Good Weekend and the Australian Magazine, are measured using specific issue "through-the-book".

With the successful conversion to color specific issue front covers for monthly magazines, we wanted to establish whether or not color front covers could be used for weekly magazines.

We therefore conducted experimental work on a restricted number of weekly titles.

A comparison of the experimental results with RMRC's contemporary published results is provided in Table 5.

The results show color front covers produce significantly higher readership figures for weeklies than the standard RMRC "first-time-reading" and "through-the-book" methods. In fact for many titles, color front covers obtained readership levels similar to those obtained using a "recency" approach.

Based on these results, it's clear that for weeklies, color front covers do not adequately simulate RMRC "first-time-reading" and "through-the-book" benchmarks, and therefore we have rejected them as a possible alternative.

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(e) Validation - Source of Copy (Table 6)

We are confident of our National Readership Survey results, and believe the most appropriate validation for our 'composite' survey method is a comparison against the "through-the-book" method. Like many researchers however, we believe if we can project accurate circulation figures through our readership survey, we will be even more confident our readership estimates are close to the 'truth'.

While experimenting with color front covers for weeklies and monthlies, we commenced work on a "source of copy" based validation system.

We used a showcard to identify buyers (including those who read personally addressed subscription copies, and those who personally purchased a copy from a shop).

Of course since RMRC readership estimates for weeklies using color front covers were inflated, so were the survey based circulation estimates. We also found, due to sampling error, some readership figures for monthlies were at variance with the results we obtained using larger samples.

In order to interpret our source of copy results, we therefore took respondent reading claims and divided them by respondent buying claims to derive survey based readers-per-copy (RPC) ratios.

We then compared these results with RPCs obtained through dividing our standard National Readership Survey figures with audited circulation figures.

Three points need to be stressed:

- i) If the experimental readership figures were incorrect, or at least not truly representative of RMRC's standard readership figures, then circulation estimates from our survey are clearly biased in the same direction suspect;
- ii) Previous experience in other markets has shown estimates of market size, based on short questions about purchasing (eg. when did you last buy a tin of paint? etc.) invariably produce inflated results. This is because more than one individual claims to have bought. The source of copy question is subject to the same inherent bias (particularly for titles with a dual male/female profile).
- iii) Published circulation figures may include, for instance, copies of magazines which are sent to New Zealand, or given away free to hotels (which may not be read), etc. These copies should be excluded from the circulation figures although they are not.

Nevertheless our first attempt at validation through source of copy provided some interesting results.

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Table 6 presents a comparison of the experimental survey derived readers-per-copy figures with the readers-per-copy implied by our standard National Readership Survey. Due to the relatively small sample upon which the experimental data was based, only figures for larger titles are provided.

For these titles, there is a remarkable consistency between the two sets of figures. The experimental data shows an average "readers-per-copy" of 2.6, compared with a figure of 2.9 obtained from our standard National Readership Survey and audited circulation figures.

We believe these 'early days' results show that we are certainly heading in the right direction with our validation approach.

We are continuing with further experimentation, refining our "source of copy" question and collecting data on larger samples to explore results on smaller titles.

We believe further refinement of the source of copy question will provide strong 'hard' evidence that the RMRC survey method is in fact, very close to the ideal.

Probably the most important issue arising from these initial validation experiments is this:

Let's say for the moment the normal RMRC National Readership Survey estimates for some titles are slightly inflated. Then "recency" based readership estimates, particularly for monthlies, must be **significantly wrong**.

With the growth of global marketing, and increasing pressure for accountability to advertisers, we must come to some international agreement on standards in print media research.

We think our "composite" method of readership measurement is, in fact, close to the ideal. For those still using "recency", we'd suggest it's time you pulled your dart out from the wall, and had another go at hitting the centre of the dartboard.

Table 1

Readers-per-copy

- Weekly Magazines -

	<u>'Recency'</u> <u>Oct'81-Sept'82</u>	<u>'First-time-reading'</u> <u>Apr'84-Mar'85</u>	<u>Difference</u>
(Interviews)	(27,186)	(27,349)	
<u>Large circulation</u>			
New Idea	3.3	2.7	-18%
Woman's Day	3.7	2.6	-30%
TV Week	<u>3.4</u>	<u>2.6</u>	-24%
(Average)	(3.5)	(2.6)	(-24%)
<u>Medium circulation</u>			
Australasian Post	3.3	2.7	-18%
People	<u>3.6</u>	<u>2.6</u>	-28%
(Average)	(3.5)	(2.7)	(-23%)
<u>News/Business (Small Circulation)</u>			
Time	6.2	4.0	-35%
Bulletin	7.2	4.5	-38%
Newsweek	6.7	-	
BRW	<u>7.9</u>	<u>5.4</u>	-32%
(Average) *	(7.1)	(4.6)	(-35%)

\*Excludes Newsweek

Table 2

Readership Penetration

- Weekly Magazines -

	<u>Standard Survey</u>	<u>Experimental Survey</u>	
	<u>('First-time -reading') Apr-Sept '86</u>	<u>('Through-the -book') Mar-Dec '86</u>	<u>Difference</u>
(Interviews)	(14,721) %	(9,464) %	
<u>Large Circulation</u>			
New Idea	20.5	18.9	-8%
Woman's Day	12.7	13.9	+9%
TV Week	<u>17.3</u>	<u>17.6</u>	+2%
(Average)	(16.8)	(16.8)	=
<u>News/Business (Small Circulation)</u>			
Time	3.1	4.9	+58%
Bulletin	4.8	5.9	+23%
BRW	<u>2.3</u>	<u>3.1</u>	+35%
(Average)	(3.4)	(4.6)	(+35%)

Table 3

Readership Penetration

- Newspaper Inserted Magazines and Host Newspapers -

	Standard Survey	Experimental Survey
	Apr'89-Mar'90 ( <u>'Through-the-book'</u> )	Feb/May'90 ( <u>'First-time-reading'</u> )* ( <u>'Recency'</u> )*
<u>National</u>		
(Interviews)	(29,131) %	(2,581) %
Weekend Australian	7.1	
Australian Magazine	3.5	4.4 ← 6.7 → 5.1
[Ratio mag: paper]	[50]	[66] [76]
<u>NSW/Victoria</u>		
(Interviews)	(17,751)	(1,561)
Saturday Sydney		
Morning Herald/Age	26.8	18.1 ← 27.4 → 21.0
Good Weekend Mag.	15.2	[66] [77]
[Ratio mag: paper]	[57]	

\*(For magazines)



Table 4

Readership Penetration

- Monthly Magazines -

	Standard Survey	
	Apr'89-Mar'90 (Black & White Front Covers)	May-Sept'90 (Color Front Covers)
(Interviews)	(29,131) %	(12,617) %
Aust. Women's Weekly	28.5*	29.7
Readers Digest	12.1*	10.2
Family Circle	8.9*	6.6
GH/HQ	1.1	1.0
Better Homes & Gardens	9.1	7.6
Home Beautiful	6.5	6.8
House & Garden	8.4	8.5
Your Garden	3.6	3.9
Vogue Living	1.5	1.7
Cleo	8.1	7.1
Cosmopolitan	5.5	6.0
New Woman	3.6	3.7
Ita	2.5	2.0
Vogue	3.0	3.1
Dolly	5.3	4.7
Mode	1.9	1.6
Follow Me	1.3	1.2
Portfolio	0.8	1.0
Studio Collections	1.4	1.2
Mode Brides	1.5	1.2
Bride to Be	1.3	1.2
Interior Design	0.8	0.6
Aust. Country Style	1.1	1.1
Rolling Stone	2.3	2.0
Countdown	2.7	2.8
Smash Hits	4.5	5.0

\* Actual "front cover" used for Australian Women's Weekly, Readers Digest and Family Circle

Table 5

Readership Penetration

- Weekly Magazines -

	<u>Standard Survey</u> ( <u>'First time reading/ Through-the-book'</u> ) <u>Apr '89-Mar '90</u>	<u>Experimental Survey</u> ( <u>Color Front Covers</u> ) <u>Aug '90</u>	<u>Difference</u>
(Interviews)	(29,131) %	(2,403) %	
<u>Large Circulation</u>			
New Idea	21.1*	25.0	+18%
Woman's Day	16.3*	24.1	+48%
TV Week	<u>18.1*</u>	<u>23.4</u>	<u>+29%</u>
(Average)	(18.5)	(24.2)	(+31%)
<u>Medium Circulation</u>			
Australasian Post	4.0*	6.3	+58%
People	<u>6.3*</u>	<u>7.7</u>	<u>+22%</u>
(Average)	(5.2)	(7.0)	(+35%)
<u>News/Business (Small Circulation)</u>			
Time	3.5#	7.0	+100%
Bulletin	4.7#	7.4	+57%
BRW	2.6#	4.2	+62%
Australian Business	<u>1.3#</u>	<u>2.2</u>	<u>+69%</u>
(Average)	(3.0)	(5.2)	(+73%)
<u>Newspaper Inserts</u>			
Australian Magazine	3.5#	8.0	+129%
Good Weekend	<u>15.2#</u>	<u>22.3</u>	<u>+47%</u>
(Average)	(9.4)	(15.2)	(+62%)

\* First-time-reading

# Through-the-book

Table 6

Readers Per Copy

		RMRC Standard Survey Readership result divided by ABC Circulation <u>Apr'89-Mar'90</u>	Experimental 'Survey Derived' RPC <u>Aug/Sept'90</u>	<u>Average difference</u>
<u>Large Circulation</u>				
Aust. Women's Weekly	(M)	3.2	2.9	
New Idea	(W)	2.8	2.6	
Woman's Day	(W)	2.3	2.5	
TV Week	(W)	3.0	2.4	
Family Circle	(M)	<u>3.1</u>	<u>2.7</u>	
(Average)		(2.9)	(2.6)	(-10%)

(M) = Monthly      (W) = Weekly