

WHAT'S NEW IN READERSHIP RESEARCH

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Summary

Based on the "Summary of Current Readership Research", which deals with the methodological details of 62 surveys in 49 countries, this paper describes the observed trends and reports "What's new" in various countries since the last Symposium.

Introduction

The ninth edition of the "Summary of Current Readership Research" which I have the pleasure once again of presenting to delegates at this Symposium, includes a record number of surveys. It reports the survey details of 62 total audience readership surveys in 49 countries. At the last Symposium of 1997 in Vancouver, we reported 50 surveys from 44 countries, which was then a record number.

In addition to the main body of the compilation, the Summary also includes top-line information about 56 other major readership surveys worldwide, which are primarily designed to establish the readerships of special audiences, like businessmen.

As you know, the Summary includes in a comparative matrix format the methodological survey details relating to sampling, fieldwork, reporting, sponsorship, publications covered, stimulus employed, definition of reading, filter, recency and frequency questions, question order, rotations of publications, quality of reading questions, AIR calculations, marketing data and demographics.

Compared with the last update of 1997, 15 surveys are included for the first time in the 1999 edition. These are two surveys from Argentina, two from China, and one each from Australia, Brazil, Chile, Colombia, India, Ireland, Mexico, Peru, Puerto Rico, Russia and Venezuela. Six of these new surveys are in addition to the already existing surveys, namely those in Australia, Brazil, China, India and Ireland.

In six countries, the surveys reported last time have been replaced by others. The countries concerned are: the Czech and Slovak Republics, Kuwait, New Zealand, Poland and Ukraine. This list does not include surveys which have been replaced or modified or renamed by the same survey organisations like those in China and New Zealand by AC Nielsen, or the Simmons survey in the USA. Three countries I have deleted, namely Romania, Saudi Arabia and the United Arab Emirates.

What is the reason for this sudden increase? For one thing, nearly half of the extra surveys are accounted for by new Latin American TGIs. There are also details of new European TGIs. And, as mentioned, there are various surveys which are set up in competition to long established surveys in their respective countries.

In the past when I reported the trends I saw emerging out of comparing the different survey methodologies country by country, a task which goes back to the first Symposium in New Orleans in 1981, I was disappointed about the lack of harmonisation. I was not looking for harmonisation for its own sake, but for movement towards standards which we would regard as superior, taken our increasing insights into the effects of our method choices into account. This view was perhaps too idealistic.

I am not as disappointed now, because I see that many changes have been made to different survey practices and I also note the designs of new surveys, which - with few exceptions - seem to be based on deliberate and reasonable choices. That these are not the same in all cases is due to the fact that we researchers these days seem to look for "acceptable" practice rather than an elusive "best" practice.

In the following, I will present the methodological trends for some key features of survey design, as they seem to emerge this time round, and report "What's new" to which correspondents in various countries have drawn my attention. As always I am grateful for all their help in updating the Summary.

Advertising Expenditure on Press

First I should like to place the content of this report into the context of advertising expenditure. Press is a very important medium. In 18 of the 49 countries included in the Summary is the proportion of spending on Press over half of the total expenditure, according to World Advertising Trends 1999, published by NTC Publications. The latest figures relate to 1997. In 22 countries, press advertising is between a third and a half of total expenditure; and in nine countries it is less than a third

The 18 countries in which 50% or more of their advertising expenditure is on Press, are (in rank order):

	%		%
	<u>On Press</u>		<u>On Press</u>
Kuwait	85	Malaysia	66
Denmark	75	Austria	62
Finland	73	UK	59
Switzerland	73	India	58
Netherlands	72	Korea	57
Sweden	72	Singapore	56
Norway	69	Australia	53
Germany	67	Canada	53
Ireland	66	USA	50

The nine countries in which less than 33% of their advertising expenditure is on Press, are:

	%		%
	<u>On Press</u>		<u>On Press</u>
Brazil	32	Thailand	28
Argentina	30	Slovak Republic	22
Mexico	30	Peru	12
Poland	29	Russia	11
Venezuela	28		

We may also observe in which countries there was greatest movement between the 1995 and 1997 expenditure figures. In three countries the proportions of Press advertising rose by more than ten per cent, namely in Greece, Hungary and Lebanon. However, in six countries the proportions of Press advertising did fall by ten per cent or more: Brazil, Czech and Slovak Republics, Slovenia, Taiwan and Thailand. They demonstrate that Press can be a more vulnerable medium in unstable economic climates than other media.

Seven countries are absolute giants in terms of advertising with 5,000 million US Dollars or more per country. These are shown in the following table:

	<u>Total</u> (million US\$)	<u>Press %</u>
USA	105,016	50.3
Japan	33,722	39.6
Germany	19,161	66.8
UK	15,719	58.9
France	9,258	47.1
Brazil	6,616	32.3
Italy	<u>5,876</u>	<u>36.5</u>
	185,365	52.3

While in only three of these seven countries Press accounts for 50% or more of advertising spend (Germany, UK and USA), the absolute amounts spent on Press in all of them are large.

The Readership Model

The Recent Reading model continues to be the dominant model. Since the abandonment of the Through-the-Book method by Simmons in the USA in 1995, only Canada's PMB and, partly, Australia's Roy Morgan surveys employ Through-the-Book at present. However, Canada has just announced that they will switch to Recent Reading as from January 2000.

Apart from these, the only surveys not employing Recent Reading are those in Denmark (Index), Sweden (Orvesto), Switzerland (MACH) and, as a new departure, the Simmons survey in the USA. These four surveys use Frequency to calculate average issue readership - the Danish and Swiss surveys collect the data by telephone, and the other two by self-completion mail questionnaires. (However, Switzerland has just switched to Recent Reading, fieldwork started in March 1999 and the new results are expected in September 2000).

FRY - the First Read Yesterday method - is a variant of Recent Reading. It is presently used in only two countries: Finland and Norway (Forbruker & Media - newspapers only).

Mixed Methods for Readership Questions

An interesting new trend emerges: that of mixing methodologies of collecting readership data. The Australian Roy Morgan survey has done this for quite a while, using different stimuli for different types of publication. In this Australian survey, the stimuli for newspapers and weekly magazines are typescript titles listed on cards. For monthly publications, colour reproductions of front covers are shown to respondents; and for business publications, regardless of their publication frequency, the Through-the-Book method is used.

As a new development, the Forbruker and Media survey in Norway which is conducted by telephone, has recently switched the collection of magazine data to a mail self-completion questionnaire with mastheads, while newspaper data continue to be collected by the FRY method on the telephone.

In contrast to those two surveys from Australia and Norway, which use mixed methods amongst the same samples, the third case of mixed methodology for readership questions employs different samples. This is the new entry into the Summary from Russia. The Russian survey is in two parts, one dealing with the Press Audience in Moscow and the other dealing with the Press Audience in the regions. The Moscow sample is interviewed by telephone with all titles read out over the phone, while the samples interviewed elsewhere are interviewed personally face-to-face with grouped mastheads.

Further examples of mixed methodologies occur for newspaper supplements in a variety of countries. I will cover this separately below.

Method of Interview

The dominant method of interview for the readership questions remains the personal, face-to-face method, with 50 out of 62 surveys. Nine surveys employ the telephone method, and five self-completion (Norway and Russia are double-counted for this because of their mixed methodologies), as follows:

<u>Telephone Surveys</u>	<u>Self-Completion Surveys</u>
Canada (NADbank)	Ireland (TGI)
Denmark (Index Danmark/Gallup)	Japan (ACR) - Diary
Finland (KMT)	Norway (Forbruker & Media) - Magazines
France (Ipsos)	Sweden (Orvesto Consumer)
Netherlands (SummoScanner)	UK (TGI)
Norway (Forbruker & Media) - Newspapers	USA (NCS)
Portugal (Bareme Imprensa)	
Russia (Press Audience in Moscow)	
Switzerland (MACH)	

Compared with 1997, the number of telephone surveys has increased by one additional survey, Press Audience in Moscow. The number of self-completion surveys has increased by three through Norway's mixed method, Ireland's TGI and USA's new National Consumer Survey by Simmons.

One important new development is reported from France. Here the magazine survey AEPM has switched from personal pen and paper interviewing to personal electronic interviewing, not just to single screen CAPI (Computer Assisted Personal Interviewing) but in one big step to Double Screen CAPI (DS-CAPI) for which the computer screen shown to informants displays mastheads and other show material, while the interviewer's tool is the laptop into which the questionnaire is programmed, which in turn is linked to the respondent's display screen. This increases the CAPI surveys to three out of 62, as follows:

CAPI Surveys

Belgium (MMP CIM)
France (AEPM)
UK (NRS)

Sample Sizes

Sample sizes continue to grow for our readership studies. Substantial increases are reported from eight countries, as follows:

	<u>1997</u>	<u>1999</u>
Austria (MA)	14,000	17,300
China (Millennium Report)	9,000	44,000
China (NRS)	-	71,500
China (MMS)	-	50,000
France (AEPM)	15,000	20,100
Hungary (Media Analysis)	16,000	24,500
India (NRS)	132,450	235,000
India (IRS)	-	212,000
Italy (Audipress)	36,000	48,000
Norway (Forbruker & Media)	29,050	34,507
USA (MRI)	22,500	27,500
USA (NCS)	-	28,000

As may be seen, India which has always reported the largest samples, has now super-large samples - mainly due to the inclusion of rural areas into the sampled universes of its two studies, one of them new. The Indian NRS did sample urban areas only in the past. India's sample sizes are followed by China, where, however, only urban populations are sampled.

Publications Covered

As with sample sizes, the list of publications measured also continues to grow. Nearly all surveys report increases in the number of titles covered - demonstrating the pressure on our studies to include ever more titles, though we know that our surveys are not designed to cope with a limitless list. Readership estimates may suffer if the list grows too large. A few surveys managed to cut down their media lists, notably Hong Kong (Media Index) and MRI in the USA - from 77 to 58 and from 293 to 238 titles respectively. The highest numbers of titles occur in Russia (461) and China (NRS 458) - due to the many regional publications in those surveys.

Most surveys cover both, newspapers and magazines. Countries with separate newspaper and magazine surveys are Canada (NADbank and PMB), France (Ipsos and AEPM) and the USA. Both Italy and Norway (Forbruker and Media) split their media lists. In the case of Italy, the Audipress survey employs the split sample approach, with various parts of the total sample dealing with different media. However, a new approach has just been specified for the Italian survey, whereby the media list is split and administered "single-source", that is, it is asked of the same informant in two consecutive personal interviews. This is similar to the Norwegian solution already mentioned, whereby newspapers are asked about in the CATI interview, and magazines in a follow-up mail questionnaire with the same informants.

Readership Questions

As I have reported at previous occasions, there is a large variety in the way the many design elements of our readership measurement methods are organised within a survey. This has not changed. We generally agree on certain basics. We all agree on the definition of readership - basically that reading and looking at any copy, regardless of age and how obtained and regardless of how much or how little was read, counts. All but six surveys have a filter or screening question. And all but three have a frequency question,. All but three have a recency question.

However, we observe that the filter or screening question can be a time filter (43 surveys) or that the frequency question acts as the filter (nine surveys), or that the recency question acts as filter for the "within publication interval" measure (three surveys). The time-filter question may refer to "ever" (two surveys), twelve months (eight surveys), six months (11 surveys) are a mixture of three, six and twelve months, depending on the publication type (22 surveys).

The scale positions of the frequency question may be numeric or verbal, or verbal with numeric explanations. The number of scale positions may be three, four, five, six, seven or twelve. All these occur.

The recency question may be a direct one, whereby the time-periods which are to be coded by the interviewer are disclosed to the informant (34 surveys) or an indirect one, whereby the time-periods are hidden (22 surveys). Some surveys employ both methods.

The sequence of readership questions may be "frequency" followed by "recency" (32 surveys), or "recency" followed by "frequency" (11 surveys).

The publications may be asked about "vertically" - that is one after the other for one question, and then one after the other for another question; or "horizontally" - that is all questions are asked for one publication before going to the next publication. Most surveys employ the vertical procedure for the filter - or screening - question, and then the horizontal procedure for the frequency/recency or recency/frequency questions.

Rotations of the order in which publications are asked about are used by all but five surveys. The three basic variants of rotations used are as follows: both the orders of publication groups as well as publications within groups are rotated (30 surveys); the order of publication groups is rotated, but the order of publications within groups is fixed (one survey - South Africa); the order of publication groups is fixed, but the order of publications within groups is rotated (21 surveys). (For three surveys we do not have enough information on this point.)

Quality of Reading Questions

Quality of reading questions are asked in 44 out of 62 surveys. In 1997 this figure was 31 out of 50 surveys. As before, the most commonly used quality of reading question is "source of copy" (41 surveys), followed by "time spent reading" (22 surveys). Other questions used are "proportion read", "place of reading", "number of occasions read" and attitudes towards publications, including "how disappointed if publication were no longer available" as asked in the UK National Readership Survey. MPX (Magazine Page Exposures) or APX (Average Page Exposure) are attempted within two surveys (in Finland and Italy).

Frequency and Self-completion

I have already mentioned that Switzerland (MACH) is moving from Frequency to Recent Reading. However, there is, I think, a contrary trend emerging, that of moving from Recent Reading to Frequency, coupled with self-completion. Sweden's Orvesto survey, a postal survey, has used Frequency for around 30 years, but two surveys now do the same, namely the Norwegian Forbruker and Media survey for that part of the survey which collects magazine data (newspapers are dealt with in the CATI interview), and the new Simmons survey in the USA, called National Consumer Survey. The former has a "past 12 months" measure and a seven-point numeric frequency scale. The latter employs a six-months screen and a four/five-point numeric frequency scale.

Internet Measurement

In 1997 I reported that the Hong Kong Media Index had explicitly defined reading as excluding reading a publication on the Internet. In 1999, that stipulation seems to have been deleted.

While there seems to be no clear decision apparent in any of the surveys I have studied, whether informants should or should not include Internet reading in their reading claims, many surveys do include Internet usage as a separate new media measure. The Internet is one of the media covered, usually in addition to TV, radio, cinema and outdoor, in 25 of 62 surveys. In 1997 this figure was seven out of 50 surveys.

Newspaper Sections

For this year's Summary, a new question to our correspondents asked: "Does this survey provide data relating to newspaper sections? If so, please give brief details." This question was answered positively in relation to 29 out of 62 surveys, of which eight use the recent reading method for newspaper sections, one the frequency method, nine habitual or frequent reading, and six establish sections readership through topic interest questions. In four cases I was not able to determine the method used.

Fusion Techniques

Again, for the first time a question was asked about fusion: "Are any statistical fusion techniques used to provide joint data? If so, does it involve product data, readership data, other media, or other?" This question was answered positively in relation to 22 out of 62 surveys. Ten of these fuse products and other media with readership data, five fuse products to readership, two fuse TV and radio to the readership data, and one fuses T,V and another one radio, to the readership data. In three cases I was not able to determine what was involved.

What's New by Country

As in previous years, I asked our correspondents to tell us about new developments in their countries which might be of interest to delegates of this Symposium. What follows are mainly their reports. In some cases, I took the liberty to include observations of my own.

The Roy Morgan organisation in Australia reports that "first time reading" is being established in their survey for weekly publications and for newspaper inserted magazines. Sections readership is being established from October 1999.

As already mentioned Canada's PMB study will switch from TTB (Through the Book) to recent Reading. Fieldwork with the new method will start in January 2000, and first results will be available in May 2001. This will involve extra sample, as follows. Normally the PMB reports on a two-year rolling sample of 24,000 respondents, that is 12,000 per annum. For the first Recent Reading year, the sample size will be 18,000, reverting to 12,000 again afterwards.

This year's Summary includes three surveys for China, The Millennium Report by AC Nielsen, The China National Readership Survey (CNRS) by CVSC (Central Viewer Survey and Consulting Centre) and Ipsos-RSL and the China Media and Marketing Survey (CMMS) by BMRB, Telmar and Sinomonitor.

The Millennium Report is the re-named and up-graded China Media Index, which has been in operation for several years, while the other two surveys are recent entries into the market. The CMMS' emphasis is on providing a TGI-type survey. CNRS' emphasis is on providing a readership currency. All three surveys employ the Recent Reading method with personal face-to-face interviews.

Sample sizes are large. The Millennium Report's annual sample is 44,000; CNRS' annual sample is 71,500 across 30 cities; CMMS' annual sample is 50,000 across 20 cities. In all three surveys, the cities chosen are those where the economic power of the population is judged to be highest. Universe definitions vary. For the Millennium Report the populations aged nine and over are defined; for CNRS the populations 15 and over; and for CMMS the populations aged 15 to 64. I understand that the populations sampled in all three cases exclude the so-called floating populations, which are increasing spectacularly in cities such as Beijing and Shanghai.

From Finland we hear that the survey which exists there for regional media will be changed from a face-to-face interview survey in 30 separate areas, into a nationally sampled CATI survey. Fieldwork started in September 1999; the annual sample size is 26,000.

The big news from France is the implementation of Double-screen CAPI (Computer Assisted Personal Interviewing) for the French magazine survey under the direction of AEPM. Fieldwork started in January 1999. The annual sample size has been increased from 15,000 to 20,100. The new method is the subject of a paper at this Symposium, which I believe will include a discussion of the experimental separate use of a "yesterday" question for all publications. For the main study, "yesterday" has become the first pre-code of the disclosed recency scale.

There is always quite a list of activities reported from Germany. The list comes from the AG.MA organisation.

Firstly, they report that the development of pen-top interviewing still needs further examination before decisions can be taken.

Secondly, there are discussions concerning the demand to extend the classification and market group data. Single source is preferred but this is thought to be impossible to implement. Currently, tests are underway involving fusion, with a view of being ready for Spring 2000.

Thirdly, there is the wish within AG.MA to provide planning data for strategic media mix decisions. The time-budget approach has been chosen as the preferred method, but for costs and time constraint reasons, this cannot be realised in the foreseeable future.

And finally, Germany is discussing AG.MA's universe definition. Currently, the sample excludes residents in Germany who are not of German nationality; they amount to nearly seven and a half million people out of about 82 million in total, that is nine per cent. AG.MA is currently investigating how a sample may be drawn to represent this part of the population properly.

India has now two surveys. First there is the National Readership Survey (NRS) which has been conducted many times in the past. This survey is supported by The National Readership Studies Council, a division of the Audit Bureau of Circulations (India). And secondly, there is the new Indian Readership Survey (IRS) which is supported by the Media Research Users Council. The NRS samples the population aged 15 plus, the IRS the population aged 12 plus. Both surveys include, and this is new for NRS as well as IRS, the rural population. Consequently, sample sizes are large. The NRS' sample has been increased from 132,000 to 235,000. The IRS sample is 212,000.

Our correspondent in Indonesia reports that the Government there is reviewing its media policies and adopting a more liberal approach. It seems to want to stop its practice of revoking licences for publications that upset them, and it wants to issue more licenses generally.

The interesting news from Ireland is that a private survey has been conducted on behalf of a British newspaper publisher, to establish the readerships of both Irish and UK titles. The Irish joint industry survey JNRR excludes British newspapers and magazines circulating in Ireland.

AUDIPRESS of Italy has just awarded a new readership survey contract to be conducted by three market research organisations. This contract involves important changes. Firstly, interviewing will be conducted with CAPI (Computer Assisted Personal Interviewing). Secondly, the media list will as before be split; but this time the separate lists will not be distributed over two separate samples and then fused, it will be administered in two separate interviews with the same informant, in order to be nearer to the single source approach.

Video research in Japan conduct the ACR (Audience and Consumer Report) survey which has been a feature of the Summary for many years. This survey collects readership data by diary. We now learn that Video Research has launched, in October 1999, a new additional study, called "Magazine Media Research" with a sample of 6,000 adults interviewed face-to-face. It covers 450 magazines; I understand that cover reproductions of the latest two issues of each magazine are shown to informants to establish their readerships.

The report from New Zealand informs us about extensive research and development concerning response rates. This is directed at both, interviewers and respondents.

Norway has been mentioned several times already because of its partial change of the data collection method. CATI remains the method for newspapers, while magazines are now measured via a self-completion mail questionnaire, which includes mastheads, a 12-month filter, and a frequency question. Concerning the CATI newspaper measure, discussions are taking place in Norway about the possible change from the FRY method (First Read Yesterday) to RR (Recent Reading).

The methodological change to which South Africa draws attention, is the switch from the grouped mastheads method within the AMPS survey, to single title, shuffled masthead cards. They are shuffled for the six-months filter question. Thereafter the order of publication groups is fixed: dailies, weeklies, fortnightlies, monthlies.

A reverse change is reported from Spain. The EGM survey now uses grouped masthead cards- with black & white mastheads for newspapers and coloured mastheads for magazines.

News from Sweden is that the Orvesto survey which has featured in the Summary since its beginnings, has survived all recent challenges to its dominance in the Swedish market. Also of interest to Symposium delegates may be the fact that the very first Internet panel outside the US was set up in Sweden.

The MACH study of Switzerland has a new design. The new features include the switch from frequency to recency as the basis of the average-issue-readership estimates, and the inclusion of various quality of reading and topic interest questions. There will also be new radio and television questions. The survey retains the CATI methodology. Following tests, the new recency measures are expected to lower the readership scores for all publications except the monthlies. Fieldwork with the new design started in March 1999. Results will be out in September 2000.

The United Kingdom's National Readership Survey reports two methodological changes: one is the new way of measuring newspaper supplements in a different part of the interview compared with before. The new design was tested in a split-sample on-survey experiment over two years. It allows more supplements to be measured than was possible before. The other change is a more sophisticated rotation order concerning the layout of the six publications on the NRS' grouped titles cards. Instead of two layout variations, there are now six; this is in addition to the unchanged card and prompt orders. This change came into effect in July 1998.

In view of a new NRS Contract period from January 2001, the current discussions in the UK centre around the length of the media list, mixed methods of collecting the data, model bias and telescoping, audience accumulation, and the measurement of component parts of national newspapers.

News from the USA concern both MRI and Simmons. MRI reports that they conducted the first audience accumulation study for various magazines in 20 years. First results will be shown at this Symposium. Simmons replaced its previous "Study of Media and Markets" with a new study called "National Consumer Survey". This survey uses personal recruitment in the top twelve markets and telephone recruitment elsewhere. The data collection method is a self-administered mail survey, including the readership data. The readership questions consist of a six-month screen and a frequency question and no recency. Black and white logos are shown on the questionnaire.

Conclusion

In conclusion, it is true that there is a wide variety of different methods, when one looks at the details of our readership surveys. The changes made, and the news reported from the many countries, however, demonstrate that there is continuing and perhaps increasing awareness of the importance of these issues, and a desire to improve.

