

# THE NEW MAGAZINE READERSHIP SURVEY IN FRANCE - PRELIMINARY RESULTS

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## Abstract

Since January 1999, magazine readership surveys in France have been using the CAPI double screen system. The researchers use a micro computer that asks the questions, handles the random order and filters, and logs the answers. It is connected to an electronic laptop that presents the respondents with the magazine mastheads and answer cards. This article explains why the AEPM adopted this system and provides the initial readership survey interview data gathered between January and June 1999.

Today you are lucky - I'm offering you a scoop ! i.e. findings from the new magazine readership survey in France before the research is even completed. Fieldwork commenced in January this year and the initial figures per publication will not be published before March next year, once a whole year of research has been concluded. I shall be commenting on the accumulated data from the first six months of the survey (i.e. January through June 1999) relating to overall readership figures. There are as yet no figures available per magazine, but they are not of vital interest here.

## Background

Before giving you the figures I should go back a little and explain why we decided to make the changes to our procedure.

In 1992, the magazine publishers decided to leave the CESP (the French Joint Industry Committee) and take over the management and financing of readership surveys. They had been irritated by the frequent changes in working methods which meant that the findings could not be compared from one year to the next, and they particularly deplored the way the Filter question used cards that featured mastheads combining a group of magazines. This system, instigated by the CESP to reduce interview time (and used in many other countries) had substantially reduced readership levels.

The CESP was becoming the media research audit centre, and the magazine publishers started looking for a jointly agreed working method. The AEPM embarked on a new survey in April 1993 after a series of tests. It involved two key changes :

- a return to masthead cards featuring a single magazine (the only system that would be fair to all the publications, according to the publishers) ;
- the introduction of questions about reading habits (renewed consultation and places of reading). To render the answers more reliable, these questions were only set to Yesterday readers, and a new Yesterday Reading question was included in the questionnaire appearing prior to the Recency Question.

The survey involved a face to face interview using pencil and paper. For the Filter Question about reading over the last twelve months two masthead booklets were used (one for weeklies and fortnightlies, and one for monthlies and bi-monthlies). After the Filter Question the following questions were asked in turn about every publication :

- the Frequency Question
- the Yesterday reading Question (i.e. Did you read it yesterday ? with a yes / no answer)
- the Recency Question was set to those who gave a 'No' answer to the above, with a 6 rung scale ;
- the Source of Copy Question
- and finally questions about reading habits (only asked about magazines read the day before).

It may seem illogical to insert a Yesterday Reading question between a question about Past Year reading and the Recency Question, but integrating Yesterday as a rung in the Recency Question ranking (even if it was the first rung in the scale) we feared it would be neglected in favour of the furthest rankings covering much longer periods of time. In other words, since we wanted to assess Yesterday readership patterns a sufficient number of Yesterday (and particularly monthly) magazine readers had to be found.

Naturally this point was criticized by the CESP's technical audit and by part of the market. In 1998 the following breakdown for Recency Question findings was obtained :

	<b>TV Weeklies</b>	<b>Other Weeklies</b>	<b>Monthlies</b>
Yesterday	100	100	100
Day before yesterday	14	20	-
Less than 8 days ago	-	-	145

This pointed to seven times more Yesterday readers than Day Before Yesterday readers (therefore non Yesterday readers) when it came to TV weeklies. It presumed that the readers consulted them almost daily. This may be true if they are regular readers but it is less likely if the figures include occasional readers. Likewise, it seems improbable that the Yesterday / Day before Yesterday readership ratio would be 5 to 1 when it comes to non TV weeklies.

Apart from the criticism of methodology, another difficulty quickly became apparent – the number of publications covered and the duration of the questionnaire.

<b>Year</b>	<b>Length of Interview</b>	<b>Number of magazines covered</b>
1993	44 min 12 sec	129
1994	45 30	135
1995	46 00	135
1996	46 36	130
1997	46 36	137
1998	46 42	140

With three quarters of an hour per interview, and 15 minutes (= one third) being devoted to the Filter Question alone, it was practically impossible to include any new publications although many hopeful candidates were knocking at the door of the AEPM.

The magazine publishers persisted in refusing to present several mastheads on the one card for the Filter Question, so some other way of shortening the interview had to be found. This led to the idea of testing out the CAPI (Computer Assisted Personal Interview) double screen system. It was hoped that saving the interviewer the job of handling the masthead cards and guiding respondents through much of the questionnaire would save time, possibly increase user-friendliness and relieve the tedium of the interview for the respondents.

**The CAPI double screen tests**

In 1997, an initial test showed that the CAPI double screen system went down well with both interviewers and interviewees. Unfortunately the average length of the interview still stood at about 44 minutes as opposed to 47 minutes on paper. The time saved was not considered significant.

Further surprises awaited us when it came to readership figures :

- the Filter was up by about 10 %
- Yesterday Readership figures were up about 15 %
- Last Period Readership remained the same.

The discrepancy between the Yesterday figures and the rest of the Last Period Readership appeared to be widening, and a straightforward transfer of the written questionnaire onto the computer turned out to be impossible.

Refusing to give up this working tool the magazine publishers took two further steps :

- They moved the face to face questions about the radio and TV habits into the centers of interest section in the self completed questionnaire. This reduced the interview time to under 40 minutes and opened the door to new publications. Since July the AEPM has covered 151 magazines and half a dozen new ones will probably join by January 2000.
- They removed the Yes /No Yesterday Reading Question and replaced it with a "Yesterday" rung in the Recency rankings.

The latter approach was the object of a further test carried out in 1998. It revealed a substantial drop in Yesterday readership (over 50 % for magazines excluding TV weeklies). Fortunately this drop had only a minor effect on Last Period Readership.

	<b>Yesterday shift</b>	<b>LPR shift</b>
TV Weeklies	- 12%	- 4%
Other weeklies	- 51%	- 8%
Monthlies	- 59%	- 2%

### Initial Survey findings

These reforms were instigated in January this year. They may be summarized as follows :

- the CAPI double screen system
- Including Yesterday Readership in the Recency Question
- Transferring the radio and TV habit questions to the self completed questionnaire.

The analysis relates to the period from January to June 1999. The Tables below cover two tests carried out in 1997 and 1998, and reflect only comparable methodologies.

**The Filter** rose by 8.7 %, exactly as predicted in the tests.

	<b>1999 SURVEY</b> Changes compared with the 1998 written survey	<b>1998 Yesterday Test</b> Changes compared with the written survey over the same period	<b>1997 CAPI TEST</b> Changes compared with the written survey over the same period
ALL MAGAZINES	+ 8,7%	+ 7,6%	+ 8,1%
WEEKLIES	+ 11,2%	+9,8%	+8,6%
TV Weeklies	+ 9,7%	+6,9%	+ 8,3%
Other Weeklies	+11,8%	+ 11,1%	+ 8,è%
MONTHLIES	+ 5,5%	+ 4,3%	+ 7,3%

The magazines were presented singly on screen as on the masthead cards. They were sorted into families and were presented in random order. The computer increased the random effect, but the Filter question was the same as in the paper version and the wording remained unchanged. To explain this remarkably stable trend we can only venture a hypothesis : it is likely that the computer increases respondent concentration and boosts the number of positive answers. It may also be because the Filter question is asked more systematically – the interviewer is obliged to run through all the publications on the screen, which may not always have happened with the booklets.

**Yesterday Readership** suffered a predicted drop – around a third overall, and varying according to frequency (i.e. about 10% for TV weeklies, 50% for other weeklies and 60% for monthlies).

	<b>1999 SURVEY</b> Changes compared with the 1998 written survey	<b>1998 Yesterday Test</b> Changes compared with the written survey over the same period
ALL MAGAZINES	- 34,2%	- 33,7%
WEEKLIES	- 25,4%	- 22,7%
TV Weeklies	- 11,7%	- 8,6%
Other Weeklies	- 49,5%	- 47,5%
MONTHLIES	- 58,7%	- 62,8%

Here the problem does not lie with the CAPI but with the changes made to the question. In the 1998 tests we took the precaution of asking the new Yesterday readership question on paper too. The changes noted are perfectly comparable with those of the CAPI. The criticism levelled at the old formulation (= a separate Yesterday question with a Yes /No answer) which was suspected of artificially boosting readership levels Yesterday were corroborated therefore.

**For Last Period Readership** the tests were not as indicative.

	<b>1999 SURVEY</b> Changes compared with the 1998 written survey	<b>1998 Yesterday Test</b> Changes compared with the written survey over the same period
ALL MAGAZINES	- 6,0%	- 3,3%
WEEKLIES	- 2,8%	- 6,1%
TV Weeklies	+ 2,0%	- 3,6%
Other Weeklies	- 7,7%	- 8,5%
MONTHLIES	- 8,8%	- 1,7%

TV weeklies were slightly up, whereas the tests anticipated more of a drop. This result is more likely due to changes in the market than changes in methodology. TV magazines are currently undergoing an upheaval in France, mainly due to dailies gradually introducing TV supplements. More surprising, and so far lacking any real explanation, is the negative change in the monthlies. Yesterday Readership levels in their Last Period total was relatively low and presumed they would suffer less from the change than the weeklies. In fact, their readership dropped by the same amount.

**The answers to the Frequency question** also change under the CAPI system. It indicates far fewer genuinely regular readers (i.e. those who ticked the first rung in the scale = "every week" for weeklies or "every month" for monthlies).

	<b>1999 SURVEY</b> Changes compared with the 1998 written survey	<b>1998 Yesterday Test</b> Changes compared with the written survey over the same period
ALL MAGAZINES	-14,0%	- 12,6%
WEEKLIES	- 8,9%	- 10,7%
TV Weeklies	- 4,9%	- 6,6%
Other Weeklies	- 14,6%	- 16,0%
MONTHLIES	- 19,0%	-16,5%

With the Filter on the increase and the Last Period Readership on a downward trend if anything, it is natural to find there are fewer regular readers. But it is not a question of the proportion of regular readers in the Filter group but rather the number of most regular readers. There is of course no explanation for this phenomenon. We could surmise that those interviewed read more thoroughly answer grids and distribute their answers better across the Frequency scale.

The new survey therefore produces a rather different readership profile – showing more readers in the Filter and less regular readers. Both findings are doubtless linked to the CAPI double screen system. It pinpoints fewer Last Period Readers which is one consequence of changing the Yesterday Reading question.

### Consistency of findings

It remains to be established if these new findings are more consistent. Some elements help understand – the relationship between the first rungs in the Recency questions and the relationship between readership and circulation.

The relationship between Yesterday Readership and the next rung in the Recency ranking is much more consistent now:

	<b>TV weeklies</b>	<b>Other weeklies</b>	<b>Monthlies</b>
<i>Yesterday</i>	100	100	100
<i>Day before yesterday</i>			
New presentation	24	69	-
Old presentation	14	20	-
<i>Within the last 8 days</i>			
New presentation	-	-	462
Old presentation	-	-	145

The link between Yesterday and the Day Before Yesterday hardly changes in the case of TV magazines. The new survey, like the previous one, reveals that they are read daily, unlike the other weeklies (which is much more plausible).

To understand the relationship between readership and circulation I have calculated the deviation in the Readers Per Copy figures per magazine family using both methods. The trend is towards less dispersion, as the calculation of the standard deviation shows :

	<b>1999 SURVEY</b> RPC standard deviation	<b>1998 SURVEY</b> RPC standard deviation
Women's magazines (20 publications)	2,9	4,5
TV magazines (13 publications)	1,9	3,8
Health (3 magazines)	1,9	2,6
Home Interiors (13 magazines.)	5,0	5,8
Economy (8 magazines)	2,7	3,3
Junior Leisure (11 magazines)	4,2	4,6
Scientific publications (7 magazines)	2,8	3,2
Cuisine (4 magazines)	3,8	4,1
News (12 magazines)	1,1	1,3
Travel (5 magazines)	4,6	3,6
Automobile (8 magazines)	6,3	5,5
Sports (4 magazines)	5,2	4,6
Senior Leisure (6 magazines)	8,2	7,8

Nine magazine families (representing 91 magazine publications) showed a lower RPC deviation in 1999 with the CAPI method than in 1998 with the written method. Four magazine families (representing 23 magazines) experienced an increase.

### Conclusion

This first year under the CAPI system seems to be running normally with its data processing. We had to battle against regular bugs in the system which resulted in the loss of several interviews – invariably the most viscous bugs that strike at total random and cannot be reproduced in the laboratory. However fortunately our computer analysts have more imagination than the computers and always managed to find a solution. We also had to put up with the disgruntlement of some interviewers who didn't like the changes. A small strike disrupted activities in March, but after some explaining and negotiating everything fell into place.

These are part and parcel of the trials of embarking on a new system. The main thing is the result. The findings I have reported here have convinced me that the new readership figures are much more consistent and reliable. I am convinced that the market will notice this, and we can only hope that the publishers will follow suit when they become acquainted with the findings in March next year (which may reveal a drop in their own publication figures !).

