READERSHIP RESEARCH IN GREECE: A NEW PERSPECTIVE

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The present paper aims at describing in summary the steps that FOCUS/BARI Media Research Agency has realized within the last two years in the Greek market, with the objective to update the technique of measuring AIR according to the continuous developments in the Print Media, and mostly, to assist publishers in obtaining a wider perspective in building their marketing and sales strategies.

INTRODUCTION

Some facts and figures about Greece: the 2001 National census reported a total population of almost 11 million, of which almost half live in Athens and Salonica. Greece entered the European Union in 1981, joined the European Monetary Union in 2000, and started using the Euro in January 2002. By the end of 2002, a large drop in consumers' purchasing power has been noted, especially among the middle and lower classes.

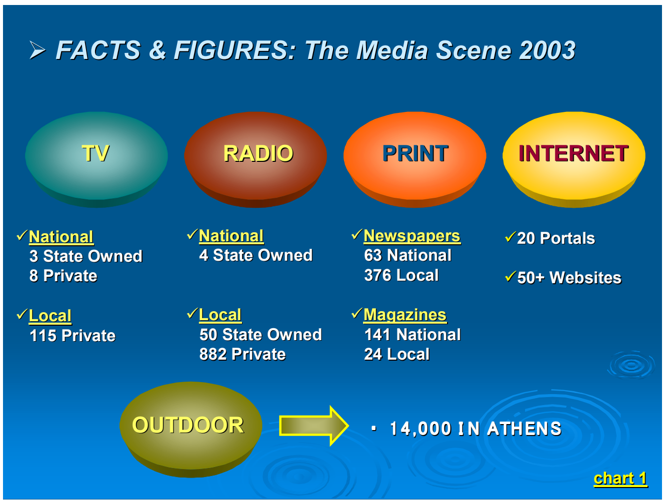
In 1998-99, the Greek stock market had reached an extreme peak, creating a new class of "easy-rich" people, yet this "crazy" rise was followed by a destructive downward shift in 2000, causing a lot of unaware middle class people great losses; however, Greece is currently preparing for the 2004 Olympics in Athens and for the 2004 government elections, and this, still prevents Greeks from experiencing the general heavier economic crisis.

In other aspects, globalization, technology, increased traveling, media and internet development have rapidly turned Greece into a contemporary country of the Western World. At the same time, the proportion of university educated and working women has more than doubled in the last decade, which postpones the age of marriage and results in less children. Also, the number of divorces has increased tremendously in the last decade, thus resulting into a considerable group of one-member or one-parent families.

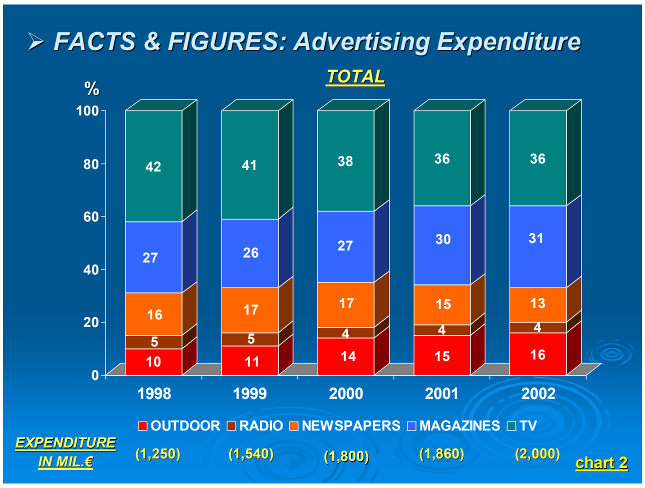
All these developments have occurred very rapidly in a country with long-standing conservatism and tradition, coupled with strong inherent characteristics such as extreme spontaneity, lack of long-term perspective and historical internal competition among governing parties.

This is clearly reflected in the development of the Media in Greece, where private radio was launched in 1987 and private TV in 1989. Newspapers, have been a long existing traditional male "political" medium, which lost a lot of its power (especially the dailies) due to private TV, and has adopted a new, contemporary "face" in the last 5 years creating a rich weekend market. Magazines, a relatively more recent medium, and traditionally closer to women, has tremendously developed in the last 15 years, while Outdoor Media have boomed in the last 5 years, but will be submitted to restrictions in view of the Olympics. Finally, the Internet is rapidly developing in Greece, currently reaching a penetration of close to 30% at national level.

What is very important to note is that all these developments have occurred very rapidly, and since there have been no state restrictions, Greece is currently a small country with an enormous amount of Media: 11 National and 115 local TV channels, 4 National and 932 local Radio Stations, 63 National and 376 local newspapers, 141 National and 24 local Magazines, 20 local Internet Portals and more than 50 local websites, and about 14.000 outdoor sites in the greater Athens area! (Chart 1).



All these media are mainly supported by advertising, which is estimated at 2 billion Euros in 2002, and according to the local media expenditure monitor, two thirds of this is shared by TV and Magazines (Chart 2). Here it is important to note that because of this media clutter, media selection has heavily relied on CPR and overall economic deals, (thus lowering the importance of quality of GRPs). Consequently, because the data of the media expenditure monitor are calculated on pricelist prices, the share of TV is estimated to be much higher in actually paid money (maybe more than 50%), while that of the print media, especially magazines is believed to be less than half of that shown in the chart!



In terms of Media Research, TV Audience is measured by AGB Peoplemeters since 1989, and FOCUS/BARI, a National Continuous Multimedia Survey has been the Industry Survey for Press and Radio since 1989, without an Official JIC. The BARI Survey is measuring radio with day-after-recall and diaries in the Athens Area, and the Print Media are measured via frequency and recency questions, based on showcards with mastheads grouped in segments.

THE PRINT MEDIA: LATEST DEVELOPMENTS

In the last ten years, the daily newspapers have been dropping in circulations, readership, loyalty, as well as image and interest; this has occurred because TV has become the main news medium, and because of increasing indifference and less fanatism regarding politics and political parties. Currently, dailies are trying to maintain their sales by offering different specialized supplements and free magazines every day of the week, such as sports, health, TV and entertainment guides, financial reviews, stockmarket, sportsbets and lottery, etc.

The Sunday and weekend editions keep a high level of sales and readers, mainly because of their continuous offers of more and more free magazines, far beyond the concept of supplements. Most of the large Sunday newspapers offer glossy monthly magazines such as Harper's Bazaar, Maison & Decoration, etc. at the price of the newspaper or with just one extra euro.

Especially in 2002-2003, Newspaper Publishers have kept launching more and more free magazines, in their effort to compete each other and altogether the Magazine Publishers! Literally, we have experienced a frequency of 2-3 new launches every month!

In the magazine market there has also been a tremendous increase in number of almost similar titles--international and local--in all segments. This has resulted in dropping circulations of individual titles, and slight increase in total circulations, total readerships and average number of titles per reader. Fierce competition has led publishers to sell most titles with banded offers of gifts, such as handbags, accessories, cd and cdroms, scarves, hats, cigar cases, wristwatches, t-shirts, cosmetics, perfumes, etc. This strategy was adopted primarily by the monthly lifestyle magazines, either addressed to women, or to men.

Furthermore, in the last two years we observe a strong competition for magazines coming from newspaper supplements and free titles.

At this point it should be noted that in Greece, circulation figures are not officially audited and that large newspaper publishers are also owners of the large private TV channels, and advertise their print media at no cost; to give idea of the intensity of print media advertising on TV, in the first 6 months of 2003, 152 titles of print media have effected 96,000 TVgrps for their own promotion.

All this promotion and continuous offers has resulted in keeping sales and readership quite high, but at the same time, it definitely creates confusion among readers, and quite frequently, the AIR becomes vulnerable: does it really express actual readership or is it reflecting awareness, and if so, to what extent?

Finally, as already hinted before, up to 2001, title selection relied heavily on CPR, economic deals and bargaining; however, in 2002, advertisers and their agencies express the need for further and more specialized information which will assist them in selecting the most suitable titles for each campaign, since it seems that if for example their budget is enough for 5 titles, there is an availability of 15-20 candidate titles, all equally suitable in terms of quantitative data for the specific brand!

Summarizing the print media development in numbers, it is seen that in 1992, the BARI Survey included 347 titles, of which 276 newspapers, 61 magazines and 10 newspaper supplements, and in 2002, the respective figures are a total of 583 titles, 425 newspapers, 120 magazines and 38 newspaper supplements (Chart 3).

➢ *THE PRINT MEDIA EVOLUTION: Last Decade*

	1992	2002
➢NEWSPAPERS	276	425
➢MAGAZINES	61	120
➢N/P SUPPLEMENTS	10	38
TOTAL	*347*	*583*

chart 3

Two major changes have been effected in the readership measurement with the objective to facilitate respondents and lower the possible degree of confusion between titles, both related to the showcards at the filter question: in 1997, we started showing mastheads in groups of same subject titles, instead of showing them in groups according to their publication interval. This change did not have any significant effect in the readership figures.

The second change was effected in the April-June 2002 wave of the survey and consisted of three steps: a) formation of two different masthead showcards--one for men and one for women--the difference between them being the order of showing the different title segments, which was designed according to their interests. b) In all respondents, a section of new publications was added in the masthead showcard, at the end as a separate group, in order to give new titles a second chance during the period of their first 12 issues. c) Interviewers were instructed to give more emphasis and time on the filter question, not only allowing respondents enough time to look at all the mastheads, but also reading out all the titles to them one by one.

As shown in the chart, this change in methodology resulted in an increase in the average issue readership of the lifestyle magazines! A slight drop is recorded in the TV and entertainment guides but this is a repeated trend every year between the winter and spring waves, the specialized magazines remain stable, and an increase is observed in the newspaper supplements which is because of their increased circulation and one major launch that took place in March 2002 (Chart 4).

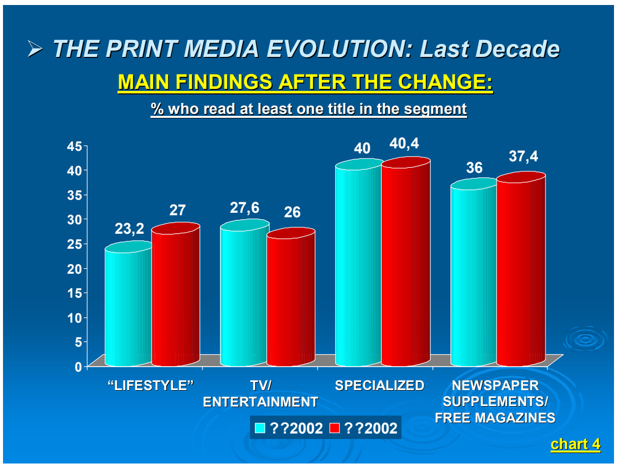


chart 4

FOCUS EXTRA RESEARCH STUDIES: 2002-2003

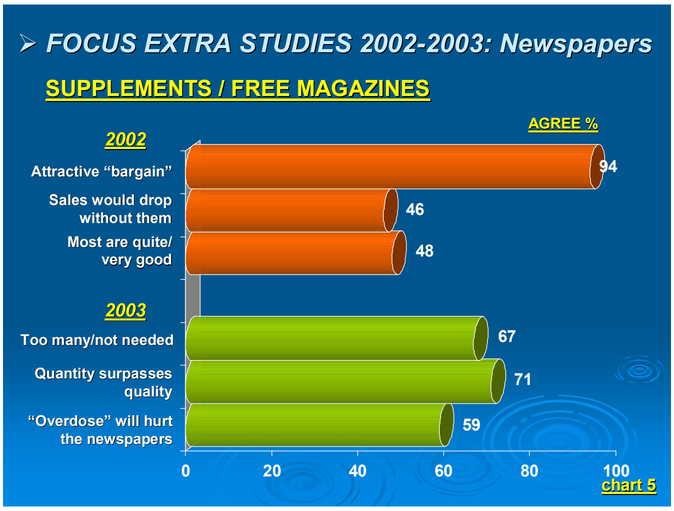
In view of all the above conditions in the print media market, Focus decided to proceed to further research steps on its own investment and initiative, with the objective to assist the media in adopting a new perspective. This initiative also stemmed from Focus ad hoc surveys at both local and international level which showed all the new consumer trends, the new target groups and the upcoming values which are bound to greatly affect media habits. Even 7 years ago, we had detected in our qualitative studies the new consumer needs for more leisure and personal quality time, the trend for rationalization towards consumerism, and the seeking for a less stressful and more balanced life; this "model" is much far from the concept of the "classic" lifestyle magazines which kept promoting the same "passé" symbol of the late 80s / early 90s!

The objective of these studies is to obtain a deeper understanding of the public's relationship with the media in general, and readers with the print media in particular, and help go beyond the AIR.

Up to now, we have conducted 4 regular quantitative surveys (one during each wave of the BARI Survey), and one large-scale Qualitative Study on Print Media. The Quantitative are telephone surveys, addressing urban population 13-70, and focused on attitudes, habits, image and reactions towards all Mass Media, with emphasis on press and radio.

The Qualitative Survey was conducted in May 2003, consisted of 10 four-hour creative groups of men and women 16-55 years and investigated in-depth each target groups attitudes towards print media, particularly on segmentation and mapping, with the objective to understand individual needs and trends as well as relationships with individual publication segments and titles. Some basic findings of this survey regarding women's magazines are shown in the following section of this paper.

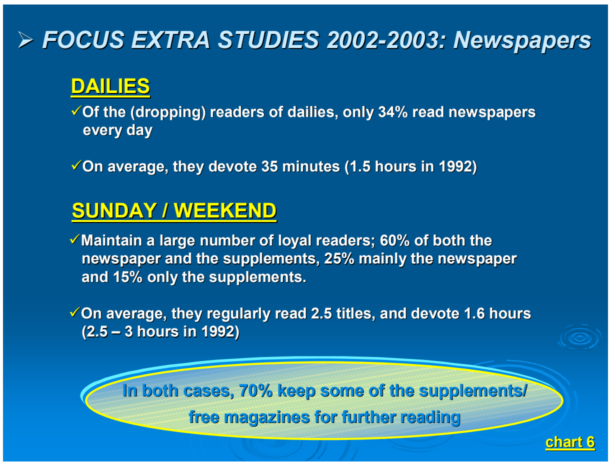
At this point, parts of the "Extra" Quantitative Studies results are presented starting with Newspapers supplements/free magazines: as shown in Chart 5, in 2002 almost all respondents agree that Sunday Newspapers with all their free magazines present a very attractive bargain for all the family, while 48% agree that most of these magazines are quite or very good in quality and contents. However, 46% felt that Newspapers offer all these magazines as stimuli for sales because otherwise their sales would be dropping. One year later, after all these launches, two out of three Greeks feel that these magazines and supplements are too many and they are not needed, an even higher proportion--71%--perceive that all this quantity tends to surpass quality, while 59% believe that this "overdose" and clutter will hurt the image of the newspapers themselves! We frequently hear that "When you buy two Sunday Newspapers, you need help in carrying them home, and once you take out all the magazines, the newspaper itself is a poor skeleton!!!"



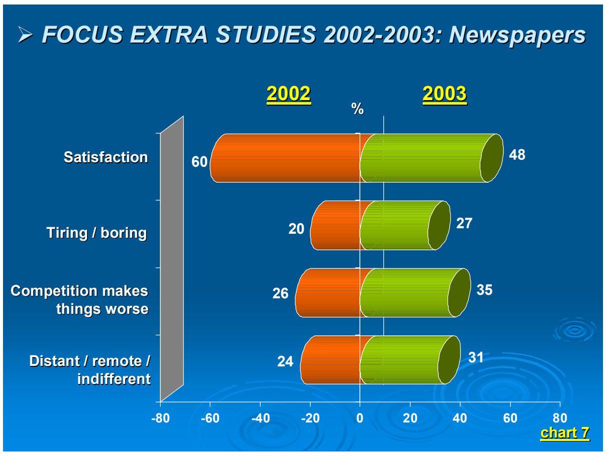
Furthermore, our habits studies revealed that of the dropping readers of the dailies, only one third are regular daily readers, and on average readers of dailies devote 35 minutes in reading daily newspapers, compared to 1.5 hours that we have found in a similar study that we conducted in 1992!

Passing on Saturday and Sunday papers: loyalty is more than 50%, and of their total readers, 60% read both the newspaper and the free magazines, one out of four read only the newspaper, while 15%--mostly women and teenagers--read only the supplements. However, although the Sunday Newspapers tend to be about 2-3 kilos of paper to carry home, on average, their readers devote 1.6 hours to the 2.5 titles they are exposed to every Sunday, instead of 2.5-3 hours of 1992.

Interestingly, 70% of readers of either daily or weekend newspapers, keep some of the supplements/free magazines longer than the paper itself for further reading, and this explains the high AIR figures of some such magazines, as well as the "agony" and strong promotion stimuli of the Magazine Publishers (Chart 6).

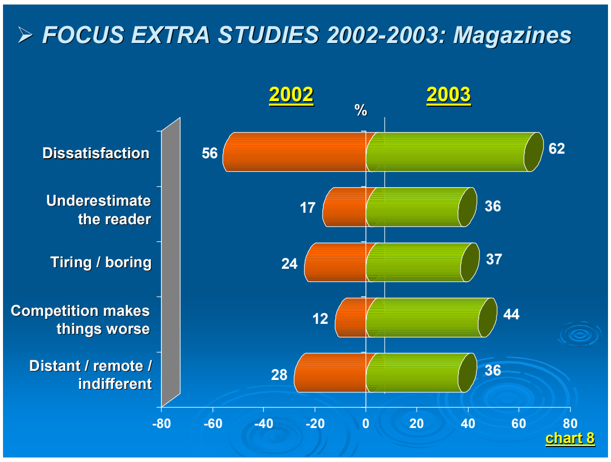


Overall however, it is clear that the general image of Newspapers is dropping: Chart 7 shows a comparative image measurement between 2002 and 2003, stressing the much lower degree of satisfaction from the Medium, the increasing proportion of people who consider them tiring and boring, as well as of those who feel that competition between titles makes things even worse, and this is bound to lead readers away from them.



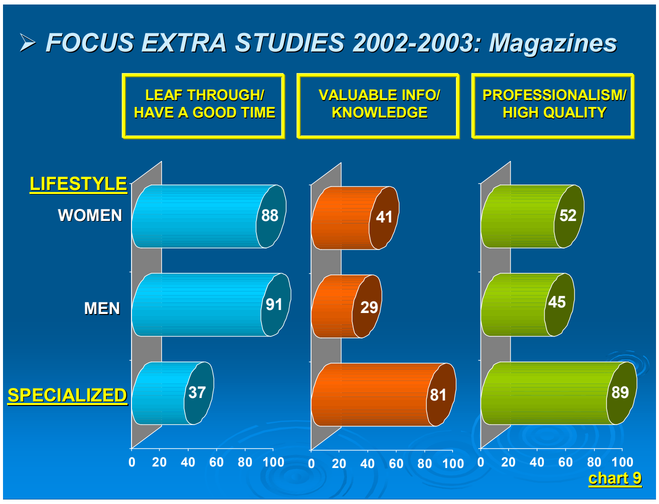
Based on these results, our recommendation to Publishers has been to slow down this continuous launch of free magazines, many of which are completely irrelevant with the image or target group of the newspaper title, not only because it endangers the long term relationship with their readers, but also because the "clutter" within the same paper may affect negatively the well-established free titles!

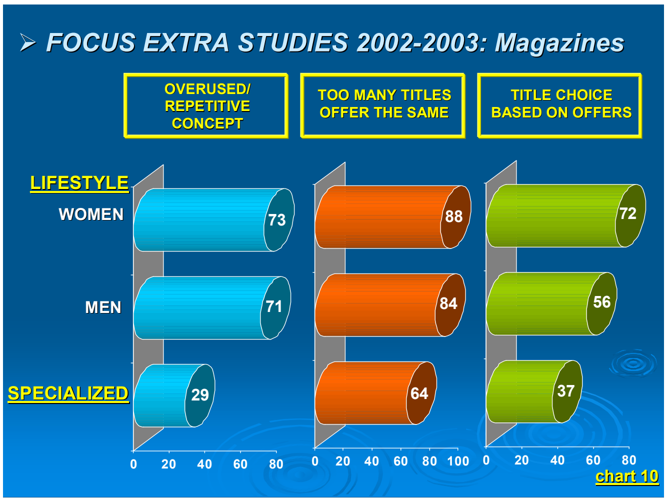
Passing on now to Magazines, the comparative image study shows an unhappy situation in 2002, which becomes even worse in 2003 (Chart 8): dissatisfaction is expressed by 62%, more than one out of three respondents consider that magazines are tiring, boring and underestimate the level of the readers, that competition between titles makes things even worse, and all these of course send people away from the medium!



However, here it should be stressed that these findings concern mainly the “classic” lifestyle magazines, which present very low loyalty even at segment level, only 18% actually read parts or all of the issue, and 60% report keeping them only for one month! On the contrary, the Specialized Magazines keep a high image and respect, because they are considered to have actual contents; 40% of their readers are loyal to the segment, nine out of ten report to read parts or all of the issue, two out or three claim to keep them much longer than their issue interval, and of those about half tend to keep some of them for ever! However, because of the large number of similar titles in most of the segments of the specialized magazines, these are also considered too many!

In Charts 9 and 10, we see a summary of the 2003 Focus Image study on Magazines, and it is clearly shown that lifestyle magazines are perceived as a medium to just leaf through and have a good time, which is fine for the role of such magazines, but how long will people pay 7 or 8 or even 9 Euros sometimes to buy a total “bargain” of a magazine with all its gifts and gimmicks and realize after devoting half an hour to leaf through that “there was nothing in it”? On the contrary, Specialized Magazines are considered to contain valuable information and offer useful knowledge to the reader, and are perceived to maintain high quality and professionalism.





It is particularly the lifestyle Magazines that are perceived to offer an overused and repetitive product concept, and this is directly related to peoples new trends and need to get away and free themselves from the “stressful” 80s and 90s which were imposed by these magazines!!! Finally, the clutter of the similar titles is actually “registered” in the respondents perceptions even for the specialized magazines, and consequently an outstanding proportion admit that their choice of title relies heavily on the offer/gift/”package” that each title presents each month at the point of sale!

Understanding this situation, most Magazine Publishers are currently reviewing their strategies, distinguishing between titles with and without future potential, and are seeking to import or develop the “new generations” titles.

FOCUSING ON WOMEN'S MAGAZINES

The last part of this paper deals with the segment of women's magazines; traditionally, magazines have been a particularly important medium for female target groups and extremely important in the media mix of cosmetics, hair care, fashion items, clothes, etc. Actually, these product categories rely heavily on the glossy women's monthlies to communicate their brands and build their image successfully, and there are very large multinational advertisers investing huge budgets in this print media category.

Consequently, at this last part of this paper, we present parts of Focus in-Depth Qualitative Study on Print Media, as well as an ad-hoc study which we carried out for one of the largest Print Media Advertiser in cooperation with their Media Specialists. The objective of this project was to arrive at the most appropriate selection of magazine titles for each one of the Clients cosmetic brands. It was a Qualiquant project which combined four steps of investigation of 32 magazine titles and 10 cosmetic brands; we included three steps of separate investigation of image, status, personality, characteristics and style, as well as a final step of direct matching between brands and titles.

Before going to the results, it is important to show the latest developments in the women's magazine market in Greece, which has changed dramatically: Up to the late nineties, the segment of women's monthlies contained ten titles, six international and four local. All these titles offered the classic product mix of women's interests, with emphasis on fashion and beauty, relationships, interviews with celebrities, as well as a variety of smaller subjects such as home/decorations, cooking, shopping, horoscope, arts, etc. This group of magazines covered primarily psychological and social needs, practical needs, in the sense of useful knowledge and information have always been of lesser importance among the readers of this category. All these magazines primarily addressed middle and upper-class women of the 16-45 years age range, with quite distinct differences between titles in terms of style and personality. Consequently, the choice of titles for the campaign of a specific brand has been relatively easy and quite clear.

In 2003 however, the picture is much different: the traditional glossy women's lifestyle monthlies still contain almost all the previous titles, but it now faces direct competition from two new sub-segments: that of the pocket size, and that of the monthlies offered by the Sunday Newspapers either for free, or for just one extra euro. Also, it should be noted that Sunday Newspapers have very high circulation figures and a long lasting acquired habit of purchasers and readers: this way, these women lifestyle magazines succeed to reach enormous numbers of households, and it is not surprising that both VimaDonna and Harper's Bazaar reached high levels of AIR among women within few months from their launch!

Furthermore, within the last five years we have experienced the launch of many new segments of magazines focusing on women's interests and fully covering subjects which were originally covered by the traditional women's monthlies: today we have 5 titles specializing on health, beauty, fitness and quality of life, 5 titles on gossip and celebrities, 4 titles on parents, 12 titles on home/cooking, 4 titles on horoscopes, all of which advertise heavily on TV and continually bombard consumers with special offers and gifts.

Faced with this situation, our qualitative survey gave great emphasis at two levels:

a) to obtain a clear understanding of women at their different lifestages, what are their objectives and goals in their contemporary social and family milieu, and through that, identify their relationship with the Mass Media and the needs they cover from each one, and
b) b) Having identified the current role and position of magazines versus the past and versus the other Media, to bring respondents in front of the current enormous variety of titles that any consumer may face at the POS and/or receive as a viewer in front of the TV set, and ask them to sort the titles out in segments and fully express their relationship with each segment and title.

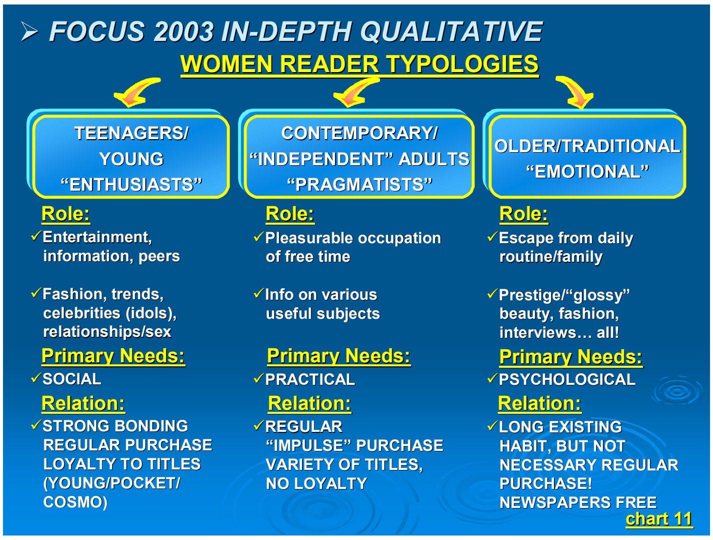
This process helped us in identifying both the typologies of readers and the segments and titles to which they are related or not related, even if they are frequently exposed to them as the AIR figures show. The main conclusion is described very shortly in Chart 11, where specific age brackets are deliberately omitted. What we found is that women readers are distinguished in three clear-cut typologies:

a) The teenagers/young adults. We named this segment "ENTHUSIASTS" because this is exactly their way of their experiencing their relationship with the magazines; for this group magazines are a very important medium of entertainment, of gaining knowledge and information to be discussed and shared with their peers. It is the only source to learn about fashion, trends of their age and read about celebrities and idols, and very importantly to read about boys and sex. Readers of this typology cover primarily social needs via magazines, and they have very strong bonding and loyalty to specific titles of the cheaper, younger pocket size segment, where the leader is Cosmopolitan.

b) The contemporary "independent" Adults; these are all working women and found primarily in the 28 – 33 age bracket, but they can also be 25 and extend to 45, depending on their education, occupation and family status. We named them "PRAGMATISTS" because they are certainly independent, with a strong personality, an individual style and a need to make their own choices. This is a very important and continuously growing group of women and we expect it to increase more and more in the future. For these women, magazines comprise a pleasurable occupation during their free time, as well as a source of information on various subjects of interest, ranging from shopping, decorations, table setting to traveling, science, economy, etc. Although they spend time on reading horoscopes, gossips, celebrities etc.

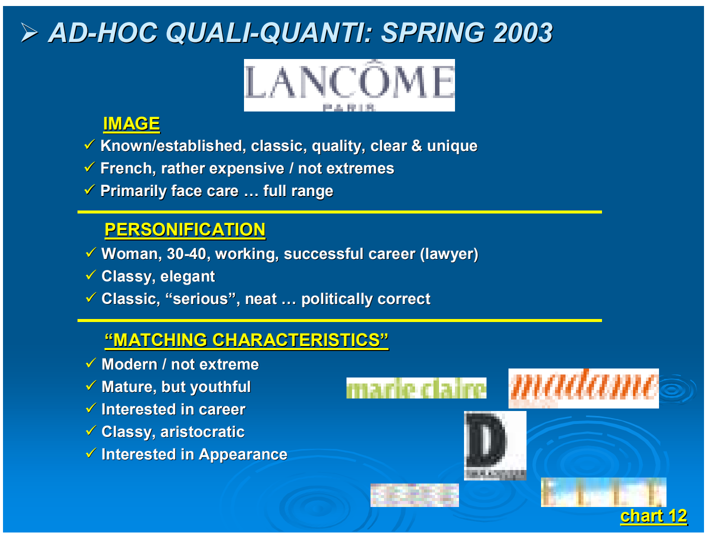
they primarily cover practical needs via lifestyle magazines, and do not have an emotional relationship with them. They are heavy readers and buy magazines regularly; however, their purchase is almost always done on impulse and they show no loyalty to specific titles among the women's lifestyle titles. They may buy any title, at any time, the stimuli coming mainly on the spot, when they have free time ahead, when they see an interesting article, or an attractive offer.

c) The older, more traditional women; this typology may start from the age of 35 and go up to the age of 55, and their primary characteristic is their resemblance to the older style of women in Greece, as opposed to the previous typology. We named these women "EMOTIONAL" because this is exactly their attitude to the "classic" women's lifestyle monthlies with which they used to be very close ten years ago. To them, the role of magazines is to help them escape from their daily routine and family obligations, and in magazines they seek the element of luxury, dream, glossy interviews, and expensive fashion. These women cover mainly individual psychological needs via magazines, but in practice, they do not tend to be loyal, regular buyers as they used to do in the past. Actually, they do have a long existing habit of reading women's magazines, but very frequently they cover this need via the glossy monthlies of the Sunday newspapers, or read the magazines their daughters bring home.



Consequently, depending on the typology and style of women in the target group of a brand, the shortlist of possible titles from which to choose for a specific campaign is definitely narrowed down.

Apart from the above general directions, the results of the qualiquant study designed specifically for a major advertiser, gave even clearer directions on title choice. In chart 12, an example for Lancôme is shown in summary: the brands main image elements are evident and clear: a well known established brand, classic, good quality, with a clean personality and unique. It is French, rather expensive but not extremely as others. Its main domain is face care products, but it also has a full range of make up, sun care, etc. products.



The main elements in the personification technique (which was also applied separately to specific magazine titles) revealed a "Woman, aged 30-40, working, successful in her career--lawyer was perceived as the most suitable profession for the Lancôme woman. She is classy and elegant, though rather classic and "serious", neat, actually her appearance and style of dressing is "politically correct".

The process of "matching characteristics between titles and brands" showed high scores in the attributes of modernity (but not extremity), a youthful maturity, classy and aristocratic, and for people who are interested in their career and their appearance.

According to the total results of the study, Marie Claire and Madame Figaro were perceived as the most suitable titles for Lancôme, because they are felt to have exactly the same qualities and characteristics in terms of personality and style. VimaDonna, a women's magazine that comes once a month with one of the biggest up market Sunday newspapers (for one extra euro), launched in March 2002, was also considered suitable for Lancôme, because it possesses similar characteristics a lot of which are related to the image of the Newspaper. Finally, two more titles were found suitable, though to a lesser extent; Diva, a local title, because it has a lot of aristocratic elements, and Elle, because it is French and modern, but slightly "younger" in personality than Lancôme.

Currently, the Media Specialists have used all this information to create specific "qualitative factors" for each surveyed title, and they have added these factors in a software which also combines readership data from the BARI survey. Their perception is that their choice of titles for each brand is now much more focused, and the Client is extremely satisfied.

READERSHIP RESEARCH: NEXT STEPS

The conclusion of our efforts is quite clear: certainly the AIR in its traditional form, is not only necessary but also "here to stay", comprising the base-currency of the market. It certainly requires regular reviews in methodology in order to take market developments into consideration, as well as possible addition of new questions towards identifying possible "key" titles for each target group. Currently, FOCUS is experimenting with such questions for the BARI Survey.

However, it is also clear that this information in not enough anymore in view of the numerous choices currently available in the market and the high figures that cannot express the real "heart" of each title. Consequently, it is felt that more qualitative work is needed on a regular basis since the market is changing so rapidly, and more ad-hoc tailor made work may help Clients and Ad Agencies make even better choices. In such cases, it is believed that specialized media research agencies and experts should be involved in the design and implementation of such projects, and this activity will bring "classic technique- oriented researchers" closer to their users and will enforce our role and profession, while at the same time the Media themselves will also come closer to their Clients and assist in developing win-win closer co-operations.