

# LOOKING FOR BEST PRACTICE

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## Synopsis

The following introduces the new edition of the “Summary of Current Readership Research”, highlights its main findings, includes the results of a special enquiry ascertaining the current response rates of national readership surveys, and presents a round-up of news about recent developments in readership research in various countries around the world.

## Introduction

The new, 12<sup>th</sup> edition of the “Summary of Current Readership Research” includes a record number of 91 surveys representing 71 countries. There are 24 additional surveys compared with the last edition presented two years ago in Cambridge, Massachusetts, which included 67 surveys from 52 countries. It is worth remembering that in 1981, for the very first Symposium in New Orleans, we had started with 24 surveys from 18 countries.

I thank all my correspondents, who supplied me with the details for this new compilation.

The additional surveys, we are pleased to say, extend our coverage to Africa (with six new countries in addition to South Africa) and further into the Middle East as well as Central America, Asia and Europe. You can now find methodological information about surveys from Bahrain, Costa Rica, Croatia, Egypt, Ghana, Guatemala, Iran, Iraq, Jordan, Kenya, Oman, the Philippines, Qatar, Saudi Arabia, Syria, Tanzania, Turkey, Uganda, the United Arab Emirates and Zambia. We deleted only one survey, the discontinued Media Index of Vietnam.

## The Purpose of the “Summary”

The basic aim and philosophy of the “Summary” has not changed at all over the years. As in 1981, when we first embarked on this exercise, our purpose is to present the current practices and compare them with each other, in a schematic way. This methodological comparison goes into great detail about the individual elements of a readership survey, elements that can influence the results, as the Symposia have taught or confirmed. We restrict our task to total audience national readership surveys - national readership surveys either in name or intention -, which are generally regarded as the standard bearers of best practice. Thus this compendium of the methodological aspects of readership measurement is there to raise awareness and facilitate learning from each other, either by example or by making the interested reader query what is offered. The “Summary” does not say: this is right and that is wrong!

An example of this neutrality, as well as the “Summary’s” potential power of raising awareness, may be seen from an interchange with one of my correspondents when preparing this new edition. This followed a small misunderstanding about terminology. In the “Summary” questionnaire we ask correspondents to say whether the survey’s “recency codes are hidden or disclosed to respondents”. My correspondent had entered: “Hidden. Interviewer classifies answers into pre-codes”. However, this particular answer seemed in conflict with another of hers regarding the wording of the recency question, from which I gleaned that her survey respondents are shown a card on which the answer categories (e.g. “yesterday, past 7 days, past 4 weeks, longer ago”) are given. So, from my perspective, this survey’s recency codes are disclosed to respondents, not hidden.

When I let her know about my editorial intervention, she asked: “I would be very much interested to know what difference do hidden and disclosed pre-codes bring to results and which is the best way to do it.”

This is what I replied. “I do not know. But I am sure that they have an effect. While the effects may be small, and of little consequence if you look at a particular publication, they may have a more considerable effect when publications are compared.” I went on to say that with pre-codes you have to decide how many you have, whether they are the same or different by publication group and how many AIR qualifying codes you have against non-qualifying codes. I confessed that, personally, I favour the hidden method, partly because I don’t like putting ideas into people’s heads, but that there may be dangers of memory problems and interviewer prompting with the hidden method, which we can’t fully control.

This sort of discussion is absent from the “Summary”. The Symposia papers or Michael Brown’s “Effective Print Media Measurement”, which draws on the papers from eight previous Symposia, are better sources for finding answers to these types of question. However, the “Summary” can be a starting point to make you ask these questions in the first place.

## Centralisation and Globalisation

The “Summary” is witness to the centralisation and globalisation of research companies in recent years. The increase in the number of surveys covered is a symptom of that process. If you look at the contact list at the back of the document, you can see that not more than 13 addresses are those of joint industry committee organisations, which we refer to as JICs, set up in their respective countries to run so-called industry contracts. Most others are those of research firms running syndicated surveys. Many of these firms bear the names of global or multi-country organisations including Ipsos (13), Kantar – including BMRB, Millward Brown and Research International (13), AC Nielsen (9), TNS (8), Ibope (5) or Roy Morgan (5).

## Other Major Surveys

While the methodological details of the “Summary” are exemplified on national readership surveys of total audiences, there are of course many other readership surveys, which are used as currencies within specific markets. We do not claim that we know about them all. However, many of these surveys have come to our attention and we have included some limited information about these, as in previous editions, in a section headed “Other Major Readership Surveys”. The number of such surveys listed in this new edition is 62 from 23 countries including international readership surveys.

## A Great Variety of Methods

Although all readership surveys in the “Summary” provide readership results following the Recent Reading model, there is a great variety of methods within this model. This starts with the choice between random or quota sampling, continues with the choice between interview methods, be it personal with pen and paper or computer assisted, or by telephone, or by self-completion, where again you have a choice, namely postal versus computer assisted self-completion. Then there is the choice of stimulus, which extends to the wording and way of asking the recency and frequency questions, covers the sequence of questions and the order in which publications are presented to respondents in the interview. We will touch on each of these in the following.

## Sample Size

Sample size is not as important as the way a sample is constructed, in respect of providing a sample free of distortion. Nevertheless, it is still interesting to see the wide range of sample size provided by the 91 surveys in the “Summary”. The range is from 1,000 in both Bahrain and Zambia to 262,900 for one of the two surveys in India – the other reports on 242,118 respondents.

The number of surveys by ranges of sample size are as follows: 22 surveys with under 5,000, 28 with 5,000-14,000, 13 with 15,000-24,000, 15 with 25,000-39,000, 5 with 40,000-49,000 and 8 with 50,000 or more.

The eight surveys with the largest sample sizes are: India-NRS 262,900, India-IRS 242,200, Russia-NRS 97,000, China-CNRS 81,000, China-CMMS 70,000, Mexico-EGM 55,200, Australia-Roy Morgan 55,000 and Brazil-Estudos Marplan/EGM 53,400.

As may be appreciated, sample size is a major factor when considering the statistical confidence limits of a readership result, and for being able to analyse particular target groups of sufficient size within the overall sample. In this respect it is worth noting that many surveys have increased their samples in the last two years. The one with the biggest increase is the ma (Media Analyse) in Germany, whose sample size grew by nearly 50% from 26,000 to 38,900, to allow for the same statistical robustness as before, after they split the sample to solve their problem of a growing media list. A proportionally similar increase has occurred in Moscow with the Russian NRS, for the same reasons.

## Sampling Method

The “Summary” does not go into great detail about sampling methodology, apart from ascertaining the basic information about whether the respondent is selected by pre-selected, probability, random method or by quota. Random is still considered the more appropriate sampling method by most readership researchers, compared with quota, as evidenced by the large number (81) of surveys being conducted that way.

Quota is the method of eight surveys. Amongst these eight I count surveys that employ random methods for the selection of sampling points, addresses or households, but apply quota controls for the selection of individuals.

The surveys conducted by quota are: Czech Republic–TGI, France–AEPM, France-TNS Sofres, Germany–AWA, Greece–Bari, Portugal–Bareme-Imprensa, Slovak Republic–TGI and Ukraine–NRS.

It may be of interest to note that two of these quota surveys are conducted by telephone, namely the French TNS Sofres survey, which covers newspapers, and the Portuguese Bareme-Imprensa. A third quota survey, the Ukrainian NRS is partly conducted by telephone.

My correspondent supplying details about Brazil’s Estudos Marplan/EGM reports that his survey employs 50% random route and 50% quota. We assume that the method is decided on geographically.

The Netherlands' NOM Print Monitor is still the only national readership survey conducted by making use of a so-called access pool, from which respondents representing PC households are randomly selected for a CASI interview on their home computer, while other respondents are randomly selected for a face-to-face interview with CASI through telephone screening. This method has been in place since 2002.

### Response Rates

While pre-selected, probability, random is our favoured sampling method, it requires the maintenance of good response rates. Many surveys experience difficulties with response rates. Some survey organisers consider switching to quota, as the French did many years ago, or perhaps to access-pool sampling, as the Dutch have done more recently. What is the current state of response rates? How serious is the problem?

For the last Symposium in 2003, I tried to obtain a picture of the trends in response rates by asking my correspondents around the world to supply me with three figures: their response rates ten years ago, five years ago and currently. When I reported my findings, I used words like "alarming" and "disconcerting". This referred to the many surveys with falling response rate trends over the ten years of my enquiry, and the fact that the trends were accelerating over the last five years. On the other hand, I also used the word "amazing" in reference to a substantial number of surveys with very high and seemingly unchanging response rates.

This year, my correspondents were asked to tell us their response rates for just the last two years, 2003 and 2004. In order to avoid the problem of response rate definition which we encountered last time, I provided the example of the two stage British NRS for which the multiplication of the first stage contact-response-rate with the second stage selected-person-response-rate gives you the overall response rate, and asked them to follow the same logic when reporting their own response rates. I am not sure whether I succeeded in all cases, but I certainly saw an improvement concerning comparability compared with last time. In addition, my correspondents were also asked whether they use incentives.

I received replies for 36 out of 81 surveys using random sampling. (Two years ago, the response was 29 surveys out of 60.) From these I make four observations: First, the range of response rates is still as wide as I reported it to be in 2003. Second, there are wide ranges of response rate by each method of interview, personal, telephone and self-completion, as may be seen from the table below. Third, there are signs of recovery: 13 surveys out of 36 report a better response rate for 2004 than for 2003, while ten surveys report no change. However, nine surveys report a lower response rate in 2004 compared with 2003. (Four surveys reported a 2004 figure only.) This may all be seen from the table appended. And fourth, incentives are widely used, with 21 surveys reporting that they use them for the readership interview – six reporting that they use them for the self-completion product questionnaire only but not for the media part.

**Table 1. Response Rate Ranges by Method of Interview**

Response Rate as reported	Total Number of Surveys	Personal	Telephone	Self-Comp.
90%+	3	3	-	-
80% - 89%	3	3	-	-
70% - 79%	5	2	1	2
60% - 69%	5	4	1	-
50% - 59%	6	3	1	2
40% - 49%	9	5	1	3
Under 40%	5	4	1	-
<b>Total</b>	<b>36</b>	<b>24</b>	<b>5</b>	<b>7</b>

Base: 36 surveys reporting their response rates in 2005

The six surveys with the highest reported response rates of 80% or more are: India-IRS with 91%, Indonesia-Media Index with 90%, Iran-TGI with 90%, Romania-NRS with 82%, Austria MA with 81% and Germany-ma with 80%.

Concerning the incentives question, this was about respondent incentives, not about monetary or other incentives for interviewers or about other fieldwork motivational strategies, which are of course of the greatest importance. We simply wanted to know how widespread the current use of respondent incentives is, because we feel that while this can be an effective tool to raise or maintain response rates, the effect may only last a short while. To make it last longer, the value of incentives will need to be constantly increased. In this respect it is interesting to note that many of the surveys reporting relatively high response rates do not use respondent incentives, for example Germany's ma (Media Analyse) with 80%, Finland's KMT with 76% or India's IRS with 91% response rates.

17 of the 21 surveys reporting the use of respondent incentives use the same incentives for all types of respondent. Two use differential incentives based on geo-demographic analysis, these being the MRI in USA and the PMB in Canada, while a further two use incentives only for specific "hard to get" groups, these being the EGM in Chile and the NRS in the UK. Small gifts like pens, gift vouchers, token sums of money or, in one case, t-shirts are typical incentives, used by 12 surveys, followed by prize draws or lotteries, used by five surveys.

## Method of Interview

71 surveys, out of the total of 91, use the personal, face-to-face method of interview for that part of the survey which deals with readership questions. Seven use the telephone, ten use self-completion and three a mixture of methods. Of the 71 personal interview surveys, the majority (63) use pen and paper, while five use CAPI (Computer Assisted Personal Interview), three DS-CAPI (Double Screen CAPI). Of the five CAPI surveys, three have moved to that method within the last two years: Greece-Bari, Hungary-MA and Slovenia-NRS. The three DS-CAPI surveys are Belgium-CIM, France-AEMP (the French magazine survey) and UK-NRS.

The seven telephone surveys, all, I believe, using CATI (Computer Assisted Telephone Interview) are: Croatia-MEDIApuls, Denmark-Index/Gallup, Finland-KMT, France-TNS Sofres (the French newspaper survey), Norway-Forbruker and Media, Portugal-Bareme-Imrensa and Switzerland-Mach basic.

Of the ten self-completion surveys, nine use pen and paper self-completion. These are: Indonesia-Roy Morgan, Ireland-TGI, Israel-TGI, Japan-ACR, New Zealand-Roy Morgan, Slovenia-TGI, Sweden-Orvesto, UK-TGI and USA-Roy Morgan. One survey uses CASI (Computer Assisted Self-Interview), this being the Dutch NOM Print Monitor. Most of these Dutch CASI interviews (over 80%) are self-completed using the respondent's own home computer, the rest is self-completed under an interviewer's supervision, using a laptop computer brought by the interviewer into the respondent's home. However, we know that one further survey, for the time being classified under personal pen and paper, is gradually switching over to CASI (in a face to face interview) with ten per cent of all interviews already conducted that way. This is the German ma (Media Analyse).

Apart from the German ma, the three surveys using a mixture of methods are the Norwegian Forbruker & Media (telephone for newspapers, self-completion for magazines) and both the Russian and Ukrainian National Readership Surveys (telephone in Moscow, St. Petersburg and Kiev, face-to-face elsewhere).

## Readership Stimulus

All readership surveys strive to present respondents with a suitable stimulus which not only helps the respondent recognise the publication to be measured, but also does not give rise to distortion in the context of all other publications on the survey, namely a stimulus that is fair and equal and helps to avoid title confusion. Apart from the telephone surveys, where that stimulus is the publication's name read out over the phone, all other surveys employ visual prompts as their stimulus. The majority use mastheads, and a few employ cover recognition (example: Japan-ACR) or even Through-the-Book methods (example: Australia-Roy Morgan for business titles). Ten surveys use only typescript names of publications.

Amongst the 62 surveys which report mastheads as their stimulus, we identify a variety of different designs. Surveys may employ single title mastheads on cards or on computer screens, or they may use grouped titles. Both single title mastheads and grouped mini-mastheads may be in colour or in black and white. This may be seen from the table below.

**Table 2. Masthead Variations**

Stimulus employed	Number of Surveys
Mastheads-single title-black/white	30
“ - “ -coloured	12
“ - “ -na	12
Mastheads-grouped titles-black/white	2
“ - “ -coloured	6
“ - “ -na	2
Covers and table of content	1
Typescript	10
Different stimulus by publication group	5
Read out (telephone)	10
Stimulus question not answered	1
<b>Total</b>	<b>91</b>

Base: 91 surveys included in 2005 “Summary”

Returning to my theme of asking what is right and what is wrong, it should not be deduced from the above that single title black and white mastheads are best, just because they are favoured by a large group of surveys. Rather, we should ask, what do we know about the effects of colour versus black and white and what are the advantages of grouped mastheads over single title mastheads? There are probably no discernible measurement effects between black and white and colour, as previous Symposia papers have shown, and there are many advantages of grouping titles together, but this particularly intricate method can also give rise to discontent if it is not applied sensitively.

### Sequence of Readership Questions

Judging from my “Summary” statistics shown in the table below, most survey practitioners agree that we need to ask a screening question first, to reduce the large number of titles which the respondent is unlikely to have seen. However, why do most surveys then ask the frequency question (“how often”) followed by recency (“when last”), while a relatively large minority asks recency first and then frequency? What are the reasons for their choices? Or does it not matter in which order you ask frequency and recency? I am not discussing this further, except for saying that I believe that some researchers follow conventions and others have good reasons, and no choice is arbitrary.

**Table 3. Sequence of Readership Questions**

Sequence of Questions	Number of Surveys
Screen-Frequency-Recency	54
Frequency-Recency	12
Screen-Recency-Frequency	17
Recency-Frequency	2
Screen-Recency	4
Recency only	1
Frequency only	1
<b>Total</b>	<b>91</b>

Base: 91 surveys of 2005 “Summary”

The one survey in the above table with a recency question only is Japan-ACR, a self-completion diary study. The one survey with a frequency question only is Sweden-Orvesto Consumer, again, a self-completion study.

#### Type of Frequency Question

On previous occasions, when I presented the findings of the “Summary”, I showed impatience with the lack of harmonisation in methods and tended to mock the great variety of methodological solutions displayed by our surveys. This, I must confess, was probably because in my enthusiasm for the methods we ourselves applied in the UK for the National Readership Survey, I wanted them to be followed by others. When I look at the “Summary” results now, which still show the same variety of solutions as ever, I seem to be more tolerant and grant that other solutions than the one I myself favour will have good reasons for their existence too.

This applies, for example, to the choice of frequency of reading question. I distinguish between the numeric and the verbal type of question. The numeric type asks the question in terms of numbers, the verbal type asks by using verbal descriptions like “almost always”, “quite often” or “only occasionally”, as is the case with the British NRS. I note that 65 surveys, out of the total of 91, use the numeric type, 20 the verbal type, two surveys use a mixture of both, and four surveys have no frequency question.

Most verbal frequency questions have it both ways and give numeric explanations as well – but the words are leading. Concerning the numeric type, there are three basic ways in which respondents are asked. It may be the number of issues out of a given number, for example “how many out of the last X”, this being the same number for all publication groups. It may be “how many out of X, Y, Z”, the numbers here being dependent on publication group. Or it may be in terms of “in an average week, month, or in the last 6, 12 months – how many issues?” here again the reference period being dependent on publication group.

#### Type of Recency Question

With the disclosed method of asking the recency (“when last”) question, we give respondents the answer categories we are interested in, for example “did you read or look at this publication yesterday, in the last seven days, in the last four weeks, or longer ago?” or “please give me the answer which applies from this card”. With the hidden method, we do not let the respondent know which answer categories we have, for example “when was the last time that you read or looked at this publication?” Here we let the interviewer decide which pre-codes to select, according to the answer given.

The question about the likely different effects on results of the hidden versus the disclosed method, which I mentioned earlier, is probably a difficult one to answer. I am not aware of any discussion of it at previous Symposia. The “Summary”, which describes the status quo, tells us that 64 surveys employ a disclosed form of recency question, 22 employ a hidden form of question and three surveys use a mixture of both, depending on publication group – that is a disclosed “yesterday” question for daily newspapers and hidden for other publications. The British NRS is one of these, and I recall quite clearly that, when the NRS tested the CAPI mode of interview in around 1990/1991, prior to adopting it fully, there was a marked effect between asking the “yesterday” question of daily newspapers directly (that is disclosed) or indirectly (that is hidden). Hence my belief that the difference can influence the results quite noticeably. (For two surveys we have not been given this detail about hidden or disclosed.)

**Media List Order**

I am sure that I am right when I declare that it is fully accepted that the order in which titles are presented to respondents in the interview can have a major influence on the readership results of a survey. When we speak about the order of the media list, we generally refer to both the order of publication groups and the order of titles within groups. The majority of surveys (66 out of the total of 91) employ one or other form of rotation to counterbalance order effects. There are also surveys with fixed media lists, many of them being pen and paper self-completion surveys. The following table shows the number of surveys categorised by various forms of ordering publications for the interview.

**Table 4. Order of Publications**

<b>Order of Groups</b>	<b>Order of Titles</b>	<b>Number of Surveys</b>
Rotated	Rotated	45
Rotated	Fixed	2
Fixed	Rotated	19
Fixed	Fixed	22
Na	Rotated	1
Na	Na	1
Different by pub. group	Different by pub. group	1
<b>Total</b>		<b>91</b>

Base: 91 surveys of 2005 “Summary”

As may be seen, there are 45 surveys for which both publication groups and the titles within groups are rotated. (There are three basic methods of rotating titles in common practice – through the shuffling of cards, through forward and reverse ordering, and through the systematic randomisation of starting points along the title list.) 41 surveys in total employ a fixed order of presenting publication groups, of which about half (19) rotate titles within the groups and the other half (22) keep titles fixed within the fixed groups as well.

The more interesting solution of these latter two categories seems to me the one employed by the 19 surveys with rotated titles within fixed groups. By rotating titles, they seem to acknowledge the importance of rotation. However, by keeping the publication groups fixed, they seem to say that a fixed order of groups is more important than a rotated order of groups. There are two different convictions behind this, because eleven of these 19 surveys seem to be convinced that the right order, which should not be rotated, is an ascending order of publication frequency – that is Dailies, Sundays, Weeklies, Fortnightlies, Monthlies etc -, while eight of them seem to be convinced of the opposite, a descending order of frequency – that is Monthlies, Fortnightlies, Weeklies, Sundays, Dailies etc. As I indicated in the beginning, a discussion of these interesting theories is absent from the “Summary”, but can be found in earlier Symposia papers.

**Quality of Reading Questions**

There is great interest in quality of reading questions, as evidenced by the fact that 76 out of the total of 91 surveys employ them. Only 15 surveys do not ask such questions. We know that practitioners need to be very careful about how they ask such questions. Without proper safeguards concerning question sequence and filtering, they can have severe negative effects on the main average issue readership results. About a third (27) of the 76 surveys with quality of reading questions employ only one such question, this is typically a source of copy question. Eight surveys employ two such questions and 41 surveys employ three or more.

This brings me to the end of the first part, my review of the main methodological observations I gathered when I compiled the new “Summary”. In the following, I give news of developments in various countries around the world, as reported to me by my “Summary” correspondents.

**News of Developments around the World**

Australia. The Roy Morgan organisation reports that there is greater focus on internet reading in Australia, especially of newspapers. They have launched a Young Australian Survey of 6 to 13 year olds, which, when combined with the survey of 14+ year olds, provides - in their words - a “kindergarten to grave” measure of readership. They also mention a new “Out and About” measure, Addressed Mail readership, focus on ROI by incorporating the power of creative execution into the total media mix and the release of Time Spent with various types of media.

Austria. The Austrian MA (Media-Analyse), whose current “Summary” details refer to MA 2004, will switch over to 100% CASI/CAPI interviewing for MA 2005.

Belgium. The CIM Survey Press and Plurimedia brings survey design and questionnaire changes to our attention. They only use one fieldwork contractor now instead of two. They have switched to DS-CAPI (Double Screen CAPI), with mastheads on the screen shown to respondents. Masthead changes can be effected every month. They have changed the definition of reporting quarters to commencing June, September, December and March respectively, and they have changed fieldwork procedures including two interviewer briefings per year and new contact procedures with a stipulation that 35% of all interviews be

conducted after 5pm. The questionnaire changes include a clarification that only the paper versions of publications are to be considered – for PDF versions there are specific questions. Newspaper supplements are measured. Mastheads on screen are in alphabetical order with alternating starting points. To avoid confusion between Dutch and French editions, both using the same title, each masthead includes an indication of the respective language. Furthermore, there are new procedures concerning the Free Press, the Source of Copy question is simplified and the only other quality of reading question concerns Way of Reading: from “reading it from the first to the last page” to “only glance through without really reading it”.

Chile. Ipsos Chile informs us about recent launches of new surveys: EGM Kids, an ad hoc Outdoor survey and EGM Executives, the latter with an annual sample of 400 respondents.

Croatia. The MEDIAPuls survey of Croatia, which is one of the new surveys in this year’s “Summary”, brings to our attention that this same survey contains advertising monitoring data for print, outdoor and TV.

Czech Republic. The Media Projekt survey, which has been included in the “Summary” for the first time though it has existed since 1994, has recently conducted pilot surveys testing different methods of interview – CAPI for print and CATI for radio. The Czech Market & Media & Lifestyle-TGI, which aligns itself to the readership results of the Media Projekt since 2003, is already partly conducted by CAPI.

Finland. The news from Finland is that the NRS industry contract has been awarded to a new contractor (Taloustutkimus Oy) from January 2005, and that the Finnish ABC (Audit Bureau of Circulations) now owns the whole survey, both the readership and the consumer data parts. Previously it owned the readership part only.

France. Here we have news from two surveys. The French magazines industry survey AEPM is testing the presentation of mastheads grouped into four on its DS-CAPI screens in a parallel survey. The purpose is to enable the survey to measure more magazines than it does at present. The French newspaper industry survey has changed contractor (to TNS Sofres) and asks additional questions of respondents concerning reader attitudes to publications. It also includes at the end of the interview an opinion survey of current topics, for exclusive editorial use by subscribing newspapers.

Germany. Two important developments are reported by the German industry survey, ma Pressemedien. First, since Wave 2 of the 2004 survey, the sample has been split three ways, each with different questionnaire versions containing different two-thirds of measured magazines, and the sample has been increased. The aim is to deal more effectively with the growing number of magazines to be measured and to reduce title load per respondent. Second, 10% of interviews are currently conducted with CASI (Computer Assisted Self-Interview), as part of the main sample.

Greece. The Bari National Readership Survey reports a major change, the switch from pen and paper to CAPI interviewing for the media part of the survey and to CATI for marketing data.

Hungary. Two new developments have occurred in Hungary with the National Media Analysis survey. One was the launch of CAPI interviewing in July 2004. The other was the creation of a joint database with FMCG purchase and consumption data in 2005.

India. My correspondent representing the Indian Readership Survey (IRS) informs us of the addition to the 2005 survey of a new concept, which is thought to be an improvement over Socio-Economic Classification (SEC). This is called Household Potential Index (HPI). It enables users to identify “real” consuming households as opposed to “potential” consuming households. 50 variables are used for the HPI, such as specific durables, consumption of FMCGs, the presence of educated members in the household, and per capita room available for individual household members. HPI scores are assigned to households in inverse proportions to the penetration or incidence of the specific variables. My correspondent says that the HPI scores enable users for the first time to compare urban Indian households with their rural counterparts on an equitable scale.

Indonesia. From Indonesia we hear that the Roy Morgan Readership Survey had a successful introduction of quarterly data release.

Ireland. The Joint National Readership Survey (JNRS) of Ireland conducted a pilot survey in the second half of 2004 with a sample of 3,500 adults, to test the readership levels to be expected for a selection of daily and monthly newspaper magazines.

Kenya. While not about readership research, we hear with interest about the testing of Portable People Meters (PPM) for the measurement of electronic media in Kenya, the first in Africa, as claimed by my correspondent. The PPM is currently in its first pilot phase and will eventually replace conventional media diaries. Together with the current electronic media diaries there are also print diaries, collected during two recent quarters in both Kenya and Tanzania, which provide a picture of readership patterns for daily newspapers and weekly and monthly magazines.

Netherlands. Specific Issue Readership (SIR) seems to be the main topic of current interest in the Netherlands. Two specific issue readership surveys had come onto the market during 2003, one by a publishing house, the other by a research company. This sparked discussions within the Joint Industry Committee (JIC) of the NOM Print Monitor about comparisons between the Recent Reading method and SIR, resulting in a new tender for the survey in Summer 2005, of which SIR is integral part. Experiments are to be conducted during Autumn 2005 and Spring 2006, testing SIR as a possible basis for the average issue readership measure of the NOM Print Monitor.

New Zealand. The Nielsen National Readership Survey intends the launch of CAPI interviewing, at the beginning of 2006, in consultation with the industry. During 2005 they have conducted CAPI trials using handheld devices.

Norway. There are various developments reported from Norway by the Forbruker & Media Survey (Consumer & Media). One is the lowering of the age of the universe definition from 13 to 12 years. A second is the extension of annual interviewing days from 300 to 345 days. A third is that now 20% of the survey's CATI interviews are to mobile phones; it was 10% previously. The reporting of newspapers is now more frequent and more detailed. And finally, speaking about mobile phones, the survey now measures mobile content of the largest media included in the survey.

Poland. The Polish PBC survey organisers announce that they will move to CAPI interviewing in 2006. They are in an advanced stage of preparation and testing.

Puerto Rico. The Puerto Rico TGI, conducted by Mediafax, has submitted the study to the US Media Ratings Council with a request for audits and accreditation. The 2005 audit was performed by independent auditors Ernst & Young, with a positive decision on accreditation being expected.

Romania. From Romania we hear that the Romanian ABC has conducted a project with the view of adding consumer data to the NRS, measuring the consumption of products and brands. The new combined survey will start in October 2005.

Russia. From Russia we have news concerning their solution to the problem of title load per respondent. Due to the increasing pressure on the length of the media list, and the worry that title overload will lead to lesser data quality and lower response rates, the Moscow part of the Russian NRS – conducted by phone – has been using a new technique since 2004. This involves different reduced lists of titles for different respondents, and the reconstruction of readership for those titles, which a respondent is not asked about. This is done by statistical procedures, which take into account the respondent's demographic profile and his readership of other titles. It involves a split of the Moscow sample into three and an increase of the annual sample by 50%, to 42,000 interviews, to preserve statistical accuracy, improve response rates and data quality generally. Concerning the NRS-Russia part of the survey – conducted by personal interview – here we hear that the universe has been extended to the adult population of all Russian cities, not just the big cities with over 100,000 inhabitants. Readership trends are reported on the old and the new universes.

Switzerland. The Mach Basic survey will report twice yearly, instead of once yearly, as of 2006.

Turkey. Three items of news are reported from Turkey. The first makes note of a pilot test of quality of reading questions for newspapers, which is currently evaluated, with a view of including a QRS module in the NRS, after suitable revision of the standard questionnaire. The second concerns the magazines measured by the survey. They are unhappy about their low results and consider leaving the contract. The third is that the ABC has started auditing and will release its first audited circulation figures towards the end of 2005.

Ukraine. Recent developments in the Ukraine involve the launch of two surveys under the joint title Print Media Index (PMI), both conducted with CATI and reported twice a year. The first is called PMI Regions and covers business, information, news analysis, accountancy and computer publications. The second is called PMI Kiev and covers women's, men's, entertainment, sport and parenting publications, amongst the population of Kiev.

UK. New developments for the British National Readership Survey concern the move to DS-CAPI (Double-Screen CAPI) and the introduction of the self-completion response rate booster questionnaire in London, both after intensive testing. Another important development is the on-survey split-sample testing of the Personalised Media List (PML) method as a solution to the problem of title load per respondent. Other issues under investigation are the impact of online reading on standard readership results, the differences in results for newspaper titles that appear both in compact and broadsheet formats, and measures to improve response rates, either through respondent incentives or a wider mix of data collection methods or both.

USA. A new development regarding the MRI survey is as follows. MRI has added four Spanish-language magazines to its survey. Respondents are asked whether or not they have read or looked into any magazines published in Spanish in the last six months. If "yes", he or she is then asked to sort the Spanish-language cards for the six months screen. All "yes" and "not sure" responses are included in the recency sort.

## Conclusion

This concludes my overview. The developments I have described, the changes I have observed and the variety of genuine solutions in existence, seem to testify to the fact that readership researchers are looking for best practice for basic measurement problems and trying to find solutions for new problems, as they arise. However, it must also be said that all this is happening within the overall concept of the ubiquitous Recent Reading model, which, as we know, is by no means perfect. There is a small sign of rebellion against it coming from the Low Countries, but in general there seems to be tacit acceptance of the status quo.

**Appendix Table: Response Rates as Reported\***

Survey	Method of Interview**	2003	2004
Austria-MA	Personal	80.7%	80.7%
Belgium-CIM	Personal	24%	25%
Canada-PMB	Personal	66.4%	66.9%
Chile-EGM	Personal	32x38=12%	26x33=9%
China-CNRS	Personal	50%	43%
Croatia-MEDIApuls	Telephone	-	35%-40%
Czech Rep.-Media Projekt	Personal	55.4%	62.0%
Finland-KMT	Telephone	74.7%	76.0%
Germany-ma	Personal	80%	87x92=80%
Greece-Bari	Personal	37.9%	38.6%
HK-Media Index	Personal	Approx. 20%	Approx. 20%
Hungary-NMA	Personal	50%	45%
India-IRS	Personal	93x96=89%	94x97=91%
Indonesia-Media Index	Personal	96x88=85%	97x93=90%
Iran-TGI	Personal	87.2%	90.2%
Ireland-JNRS	Personal	69%	71%
Ireland-TGI	Self-Completion	45%	45%
Israel-TGI	Self-Completion	Approx. 40%	Approx. 40%
Japan-ACR	Self-Completion	73%	73%
Kenya-AMPS	Personal	-	75%
Netherlands-NOM	CASI Access Pool/Personal	67%AccPl/45%Pers	70%AccPl/36%Pers
New Zealand-NRS	Personal	88.1x50.8=44.8%	88.3x51.0=45.0%
Norway-F&M	Tel.news/SCmags	Tel. 53%	Tel. 52%
Poland-PBC	Personal	48.8%	45.2%
Puerto-Rico-TGI	Personal	60%	60%
Romania-NRS	Personal	77.4%	81.6%
Russia-NRS	Tel. (Moscow)	-	49%
Singapore-Media Index	Personal	76x81=62%	72x77=55%
Slovenia-NRS	Personal	47x40=19%	46x41=19%
Slovenia-TGI	Self-Completion	S/C stage 56%	S/C stage 55%
Sweden-Orvesto	Self-Completion	54%	54%
Switzerland-MACH	Telephone	-	42.9x61.4=31.6%
Turkey-NRS	Personal	60%	57%
UK-NRS	Personal	85.6x60.5=51.8%	85.1x60.7=51.7%
UK-TGI	Self-Completion	S/C stage 46%	S/C stage 42%
USA-MRI	Personal	Spring65.3%Fall64.6%	Spring64.7%Fall65.2%

Base: 36 surveys reporting their response rates in 2005

\* Response rates for the readership part of the survey

\*\* Method of interview of the readership part of the survey

