

# THE GENUINE ARTICLE? READERSHIP MEASUREMENT AND THE INTERNET IN GREAT BRITAIN

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## Synopsis

What 'readership' are readership surveys such as the British National Readership Survey (NRS) measuring? If the advertiser wants to plan with confidence then they need to be assured that when planning a campaign, the readership they are basing their plans on is unambiguous. But what if it's not? With increased usage of the Internet you need not read an article directly from a publication but via its web site or e-publication. The NRS continues to measure the readership of the printed form but how should it adapt to the changing nature of readership?

Inspired by concerns within the NRS, and further prompted by two papers presented at the 2003 Worldwide Readership Research Symposium, the British NRS is currently exploring the extent to which respondents are including online reading within their reading claims by asking two experimental questions about their reading behaviour to readers of 12 specially selected titles. This paper examines the results of this experiment and discusses their implications for the future of the survey.

## Introduction

The last Readership Symposium included two papers that investigated the issue of online reading and their impact on conventional readership estimates<sup>i</sup>. The underlying concern expressed by both papers was that readership estimates were aligned to a trading currency based on the potential to be exposed to print advertising. When respondents include online reading in their readership claims this distorts the estimates that we produce since the advertising in a print edition is likely to be different to that in any equivalent online version. Commenting on the situation in the US, Virginia Cable and Valentine Appel's paper at the last conference echoed this point forcibly: "as they are currently worded, the leading audience measurement surveys in the US may measure exposure to the media brand, *but not the actual advertising vehicle*." The concern expressed by Virginia and Valentine was shared across the Atlantic at the offices of the NRS and Ipsos Media. Their comment is acutely relevant in the light of the objectives of the NRS:

*"this requires providing a basis for estimating the numbers and kinds of people likely to receive different patterns of potential exposure to advertisements inserted in individual publications or combinations of publications"*<sup>iii</sup>

While this does not explicitly state that NRS estimates are for printed media only, it is implicit in the definition (not discounting the possibility that the NRS may amend its position in the future). Clearly, the NRS needed to establish whether there was a degree of ambiguity about the estimates that it is producing.

Once the NRS had decided to investigate whether the same issues were applicable in Great Britain, it also asked how should we react if there were evidence? The present circumstances are that interviewers are instructed to tell respondents to exclude online reading in their claims if they are asked but there is no explicit guidance to respondents in the interview itself. If investigations concluded that there was evidence of significant online reading then it was imperative that we should decide how best to guide respondents as to how these should be treated.

The findings of the research that this document discusses indicate that online reading is a factor in Great Britain, although the second question of how we should react to it remains open to discussion both in terms of whether we should measure online and offline reading separately, and/or how we communicate a new definition of 'reading' to respondents.

## Exploratory Questions

The starting point for this investigation was the placement on the survey of some experimental questions, asked to average issue readers of twelve titles. These titles were selected because they were newspapers and magazines thought to have a strong online presence that complements or provides an alternative to their print versions. Although we could have increased the number of titles selected, we did not want to overburden respondents during the interview with extra questions and therefore restricted it to just twelve, (six daily newspapers and six magazines). In each case, average issue readers were asked two additional questions:

1. X (using newspaper/magazine title) is available as a printed newspaper/magazine and on the Internet. Do you ever look at X on the Internet?

Yes  
No

2. And when you looked at X (in the publication issue period), did you look at X on the Internet or the printed newspaper/magazine?

Internet  
Printed newspaper/magazine  
Internet and printed newspaper/magazine

The first question was asked primarily as a lead-in, to introduce the topic to respondents and clarifying what *online reading* means. Moreover it also filtered out those who never read the publication on the Internet (partly because not everyone has access to the medium) and who would therefore have found the second question especially irrelevant. The second question looked specifically at the impact of online readership on average issue readership estimates. Initially the questions were asked on the survey for a period running from November 2004 – April 2005. This was later extended through to October 2005, with an alteration to the wording of the second question – see below. This was instituted because of concern that the phrasing may have understated the possibility of the respondent having read the publication in both print and on the Internet rather than either in isolation:

2. And when you looked at X (in the publication issue period), did you look at X only on the Internet, only in print, or on both the Internet and in print?

To balance any order effects, forward and reverse rotations of each question were used with question and answer codes alternatively suggesting print or the Internet first. All questions were asked using the Double Screen CAPI software.

## Results

As the fieldwork is still progressing, the data presented below are not final but cover the data collected during the field period of November 2004 – June 2005. Furthermore, because of the experimental nature of the results and the selective nature of the title choices, actual title names are not shown, however the results for the magazines and daily newspapers are split below:

**Table 1 – Readership of publications online – November 2004 – June 2005**

	Magazines						Daily Newspapers					
	A	B	C	D	E	F	G	H	I	J	K	L
Unweighted base (average issue readers of each title)	568	152	958	950	145	136	184	505	260	3273	1148	824
<b>Q1. Whether ever look at publication on the Internet (%)</b>												
Yes	48	36	14	3	37	40	40	35	17	5	11	21
No	52	64	86	97	63	60	55	64	81	93	88	77
DK/NS	-	-	-	-	-	-	5	1	3	1	1	1
<b>Q2. AIR Attribution (%)</b>												
Internet	18	10	2	0	8	4	5	5	3	<0.5	1	2
Print	69	83	93	99	81	81	80	89	92	98	98	95
Internet and Print	13	7	5	1	11	15	9	5	3	1	1	2
Any Internet	31	17	7	1	19	19	14	9	6	1	2	4
NB: Percentages quoted above for 'AIR Attribution' are based on the average issue readers of each title.												

The findings confirm the potential for misinterpretation of readership data arising from respondents including online reading in their claims. The extent of the possible misattribution does vary from one title to the next and with the exception of one magazine (D), all show some average issue readership deriving exclusively from their online editions.

What the data shows, and which has not been shown at previous symposia, is the importance of online reading to magazines as well as newspapers. Ostensibly it would appear that in fact, online reading is more important for magazines than newspapers. However, we should not forget that these experimental questions have been asked of titles with a strong online presence and therefore these conclusions are unlikely to apply to other magazines on the Survey to the same degree. Indeed, some of the titles on the Survey do not have an equivalent web presence.

The title with the highest solus online readership (A) primarily carries classified adverts for buying and selling goods and has adapted itself to offer the same service online. It also has a relatively young readership so it is no surprise that it has a strong online following. The magazines with the next highest levels of online readership (B, E, F) are specialist interest titles and enjoy either a young or especially sophisticated readership.

The findings for the newspapers suggest that online readership of British newspapers tend to be lower than in America, particularly when compared to MRI's estimates of online reading<sup>iii</sup>. These estimate that online reading of (semi-) national newspapers in the US constitutes 11-30% of AIR. It is speculated that this difference arises chiefly from differences between the markets for US and British newspapers.

Among the newspapers, all except J are what are described in Britain as quality newspapers. G, H I have the highest online readerships.

### **Who reads online?**

Looking at the demographic profile of online readers of these titles, it is clear that younger readers of a number of these titles are turning the Internet to read them. In the most extreme case, a quarter of average issue readers under 34 of title A read it exclusively through the Internet. Compared to the overall readership, those who read it online are more likely to be male and younger than the rest of the readership. It is not the first time that either of these observations has been made<sup>iv</sup>.

### **Follow-ups**

Because of the potential impact that removing online reading would have for some titles, a study was conducted to make sure that the respondents had understood the questions about online reading. This took the form of a series of semi-structured telephone re-interviews of respondents who had made claims to exclusive online average issue readership. A series of direct and indirect questions were asked to establish whether the recorded reading event information was consistent upon re-interview. A total of 22 re-interviews covering 26 online average issue readership claims were conducted 16 June – 15 August 2005. The results supported the earlier findings that substantial elements of average issue readership attribution are being derived from the reading of online equivalents of these publications, and that, on the whole, the claims made at the original interview were sustained.

Beyond offering the opportunity to check respondent interpretation of the question wording, the re-interviews also enabled us to understand why respondents used the online versions of these titles. The answers indicate that the Internet versions offer an efficient means of finding the information they want to know (such as the price of cars) or specialist knowledge (on world events, missions to Mars and hypnotherapy!). It is also part of some respondents' daily routines (particularly newspaper websites) and offers an interesting diversion (to play games or other such frivolous entertainments). We should recognise however, that these motivations are by no means complete, are from a small sample and that the choice of titles for this research had a strong bearing on the reasons for reading them online.

### **How will the NRS proceed?**

These experimental data suggest that for some titles at least, the Internet does have the potential for affecting the estimates for print readership produced by the NRS. In theory there seem to be a number of choices open to the NRS with regards to how best proceed on this issue:

- Include the option of "through the Internet or online" within the source of copy question, as has been adopted by MRI.
- Collect online and offline readership separately for every title on the survey. This would reinforce the concept that the print and online editions are separate.
- Use ancillary questions within the interview to identify and possibly exclude online reading
- Introduce an explicit instruction to respondents to include or exclude online reading.

Although at the time of writing no final decisions have been made, the only options that seem practical are to introduce a specific respondent instruction at the reading definition as to whether or not to include online reading in their claims or to include the Internet in the source of copy of question. The other solutions, if implemented, would have an adverse impact on the interview length and respondent irritation. For instance, in the second scenario above, we would be required to ask full reach and frequency separately for each title's online and offline readership. This would be impractical in a survey covering the readership of c.300 publications.

Of the other solutions, the preference of Ipsos is to introduce a prompt at the start of the interview where we explain what the Survey means by 'reading' to give respondents clear guidance as to whether or not to include exclusive online reading in their estimates.

The double-screen CAPI software employed by the NRS lends itself to producing a clear and instructive prompt that would make this distinction clear to respondents. Although amending the provenance question is a possibility, we only collect this for average issue readers so users would have no means of extrapolating the extent to which online reading affects the full range of reach and frequency data collected by the survey. Furthermore, the data shows that some respondents will have read the title both online and in print during the last issue period, and source of copy has traditionally been single-coded (though the wording currently refers to 'the last copy' read).

In the light of this, and subject to a decision regarding whether the NRS does or does not include exclusive online reading in its estimates, Ipsos have recommended that the Survey begin testing a prompt that asks respondents to exclude online reading of titles from their claims.

## References

Cable V, Nunziato G and Appel V, *The Impact of Online Reading on Traditional Print Media Estimates*, Worldwide Readership Research Symposium 2003 p417-421

Lindner G and Traub J, *How question wording impacts newspapers estimates: Traditional vs Online*, Worldwide Readership Research Symposium 2003 p 413-416

<sup>ii</sup> *National Readership Survey Volume 2 Report*, January-December 2004 data, p4

<sup>iii</sup> *The Source*, Volume 1 Spring 2004

<sup>iv</sup> Net Ratings Inc. Press Release: *A fifth of online users who read newspapers now rely primarily on web editions*, New York, June 16 2005