

EVOLVING PRINT MARKETS: MEASUREMENT CHALLENGES

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Background

The US\$ 1.6 BN Print market in India has been showing rapid changes. After consistently losing share to Television, 2005 marked the turn around in Print's fortunes when it wrested the leadership position from television.

What were the drivers of this change? Besides the buoyant economy (growing at over 9%) and buoyant consumer confidence, the publishing industry re-looked at itself and brought about several changes:

- Drive to penetrate untapped markets : primarily small towns and adjoining rural areas
- Sharper segmentation of target readers and re-formulating product mixes
- Launch of new titles catering to tightly focused target readers
- Value adding to the titles : launch of new supplements – both in case of dailies as well as magazines
- Annual subscriptions with gifts valued more than the subscription fee
- 'Bundling' of titles – buy 1 and get 1 free, etc

These changes have brought with them a host of peculiarities which pose a challenge for researchers.

The aim of this paper is to discuss the above issues (and other such issues) which are posing a challenge for us while conducting readership studies. We would also discuss some of the solutions that we have proposed as well as experimented with to address these issues which are as follows

- Measurement of supplements
- Measurement of the 'bundled' newspapers
- Multiple mastheads
- Bi-lingual newspapers
- Estimating AIR in rural India

Measurement of supplements

Newspapers have lost their core USP of being the primary provider of news/information as people do not need to wait for their newspaper to get information about what is happening around the globe. They can get it at anytime by switching on the TV to the myriad of news channels (at last count over 50) available today. Thus the 'Recency' attribute of a newspaper is no longer relevant in today's information seeking scenario.

People today read newspapers more for analysis and different points of view. In order to counter the possible loss in readership, publishers have attempted to attract additional audiences by making their publications all encompassing by increasing the spectrum of topics covered. They have done this in two ways – increasing the number of sections (within the main publication) and by increasing the number of supplements (pull-outs) that are delivered with the main publication.

If one compares the newspapers of today with those published 5 years ago, we see that they are much thicker (due to the large number of supplements). These supplements cover a wide spectrum of topics from Health to Beauty to Education to Fashion to Travel and so on. Further, publishers have also started promoting these supplements as independent advertising vehicles. Hence it becomes imperative to provide the advertising industry with readership estimates for each individual supplement.

In fact, certain supplements have a greater equity and readership as compared to that of the main publication. In certain publications, the appeal of the supplement is so pronounced that the circulation of that publication increases substantially on the day that supplement is published. The readers buy the publication solely for that supplement. Further, a certain segment of the incremental buyers only read the supplement and not the main paper. They refer to the publication by the name of the supplement.

Therefore, if only the main paper is measured, the masthead of the main publication will be exposed and certain readers may not claim to read the main paper which would result in lower readership. Further the profile of the readers of the supplement maybe very different from that of the main paper and this would definitely not get captured in this case. This would also be an issue to the advertiser/media planner as the target groups would be different across the two publications.

Another issue is that certain supplements are distributed only in certain areas along with the main publication. Further, certain publications have customized the supplement depending on the geographical area in which they are going (split runs), hence the masthead is different in different areas. The content across the split run is same except for a couple of localized pages. Also, the publishers offer each split run as a separate advertising vehicle. Further strengthening the case for providing separate estimates for each split run.

However, providing the industry with supplement and split run level readership estimates poses its own set of challenges to the research fraternity.

Firstly, the number of mastheads a respondent would be exposed to is multiplied, which could result in a higher casualty rate as well as higher respondent fatigue. This can be taken care of by including the supplements of only those publications which have a predefined minimum readership level. (The minimum level could be determined based on the readership estimated of the previous round).

Secondly, as supplements for the same title come on different days and with varying periodicities, the sample for the same needs to be distributed across each day of the week. To ensure this, we have proposed a continuous measurement system (fieldwork throughout the year).

Thirdly, should we show the supplement masthead only to those people who read the main newspaper or to everyone? We believe that the supplements should be treated as separate titles and hence the masthead, should be shown to all respondents.

Fourthly, if one reads only the supplement, should readership be attributed to the main paper as well or not. This can be taken care of by reporting the readership of the main publication as well as the supplements. Further, if one wishes to know the readership of the publication overall an unduplicated overall count can also be released.

Regarding split runs the issue is not so clear cut. The geographical boundaries in which the split runs are circulated are not clearly defined. In certain areas they overlap depending on the distributor. This problem is further accentuated as the split run boundary definitions are different for different publications. As a result, it is very difficult to estimate the population that is serviced by each split run. This is compounded by the fact that the Census data (the framework used for estimating current population) is available at a more aggregated level namely the city or the Census wards which do not correspond to the distribution geographies of the split runs. Currently this issue is being discussed with the industry. Our recommendation is that until we get a finer read (in terms of geographies) of the census data, we administer the mastheads of all the split runs to each respondent and report at the total city level.

Measurement of bundled newspapers

Until recently, the newspaper market was mainly city specific i.e. one specific publication dominated the reader base in one city, there was no real pan-India publication. Today that scenario is changing especially in the English newspaper market. Large English dailies have started editions in cities where other newspapers had a stranglehold.

In order to protect their reader base, publications have also launched new brands and titles. They have also started to bundle both old and new titles and offer 'the bundle' as a package to their subscribers, i.e. if you were a subscriber to newspaper 'A', newspaper 'B' comes free along with it. Furthermore, a person who does not subscribe to newspaper 'A' can subscribe to newspaper 'B' separately. The challenge that now arises is whether the bundled offering should be treated as a single title with the readership attributed only to the subscribed title? Or should this offering be treated as separate stand alone titles with different readership levels?

The implications of this are varied. If we treat the bundled offering as a single title then the readership of the free copy would not get added to that of its paid counterpart thereby depressing the readership of the free copy. If we treat them as separate titles then the readership of the free copy would get attributed to that of a paid copy of the same title thereby giving us a more realistic measure of the readership levels.

Multiple mastheads for the same publication

As newspapers have moved beyond just "news" and ventured into "infotainment", it is imperative that they also need to support it with innovative marketing. One of the things that the newspapers have done in the last few years is to improvise on their mastheads. For instance, on a special occasion like a festival or India winning a big tournament, some newspapers modify the main masthead *a la* 'Google'. The instances when the masthead of a publication could be modified cannot be predicted. Also the "creative" change in the masthead could be different on different occasions. This obviously will affect AIR measurement.

In some other cases there is a separate masthead for different sections like the business section or the sports section. Does one show the Masthead of all the sections along with the main title? And do we isolate the readership of the section from the main title?

Interestingly, in some cases, the masthead of a sister publication is used for a section. How does one isolate the readership of the sister publication from that of the section readership of the main publication?

The above instances bring the basic philosophy of Recent Reading in question i.e. one masthead per publication is exposed to the respondents to assess the readership of that publication.

So, how do we handle such cases? Some of the possible solutions to the above issues are :

- Conduct continuous fieldwork to negate the effect, if any, of the change in creative representation of the masthead.
- As we are assessing the readership of the title and not individual sections, we recommend that we do not expose the respondents to the mastheads of the sections. We believe that showing multiple mastheads could mean giving an unfair advantage to those publications which have multiple mastheads for different sections as these would trigger the recall of the same publication multiple number of times.
- In cases where the masthead of a sister publication is being used for a section by a publication we recommend the following approach :
 - First list down the publications which are following this practice
 - Add additional questions for such publications where by we assess whether the respondent has read the publication in question as a separate entity or as a part of some other newspaper

Supplements as well as a Stand Alone title

As mentioned earlier, in recent past, we have witnessed a number of new titles hitting the stands. One interesting case is of an English business daily which has been launched recently. The same title (with the same branding, editorial content as well as the masthead) is also being distributed as a supplement of another daily from the same publication house. The only difference in the mastheads is the mention of price – in its stand alone format.

While we can handle the measurement of the title by exposing the masthead, the challenge lies in computing the RPC for the publication. The key question is: what should form the base for the circulation - The stand alone title? Or the circulation of the sister publication in which the new business daily is being inserted as a supplement?

Bilingual Newspapers

In most homes which are solus subscribers to regional dailies, the regional daily is mostly read by the older readers. Most of these individuals now send their children to English medium schools as English is seen as the window to the world (has an aspirational value), creating a sizeable segment amongst the younger audiences who speak in the regional language but can read and write only in English. Therefore to increase their readers per copy the language newspapers have a couple of pages printed in English. The issue here is that we expose the respondent to only those publications in the language which they can read and write with understanding. Hence being a regional publication its masthead will not be exposed to this segment of people who cannot read & write in the local language, thus depressing the readership estimate. So the question which arises is do we need to change the language filter?

The solution that we have proposed is that for all the publications which have dual language pages we include the masthead in both language sets. During analysis care needs to be taken that the respondent is considered a reader of the publication if he has claimed to read the publication in any of the two languages.

Measurement in Rural India

Rural India comprises more than half a million villages inhabited by a population of over 750 million. Any research design for rural India needs to take into account the wide heterogeneity of the market. In research terms, this presents multiple challenges: geographical coverage, sample sizes and selection of fieldwork centres

One of the most pertinent factors affecting readership is the variation in the retail distribution systems of publications. In urban India, the retail distribution systems are well organized and efficient. Consumers either get the publication delivered at their doorstep, or it is picked up by the reader from the kiosk. In rural areas, there is no validated data on distribution patterns. In most cases, the publications move from the nearest urban centre either by a bus, or an auto rickshaw, or even a bullock cart! Often there are days when the bus doesn't go to the village at all or days when the last three day's newspapers arrive bundled together. In addition, the fieldwork in a sampled village is likely to be completed in a day and not spread over the entire week, because the sample per village is small.

Therefore, using the Recent Reading Method (RRM) in a scenario with an erratic distribution system could theoretically impact readership estimates – especially newspapers. For example, in a sample village, if the day previous to the interview is one of the days when newspaper was not delivered, there would be no 'yesterday' readers. On the other hand, if the newspapers had reached the village the day previous to fieldwork, all readers would be Average Issue Readers (AIR). Therefore, is the Recent Reading Method the most efficient method of estimating readership in such a context?

Another factor that needs to be taken into account while estimating readership in rural India is the wide variations in the literacy levels across various age groups as well as States / Provinces. While the younger generation is increasingly literate, the literacy level amongst the older generations is quite low.

This has led to a culture where a literate person reads the articles and headlines out of the daily newspaper to others. The question that arises is 'are these people readers of the newspaper or not'. The current question for assessing readership is 'have you read or glanced or looked at the publication within its publication period'. In this case, how do we apply the standard Recent Reading definition for assessing the readership levels? Do we need to change the definition?

So, how do we tackle these peculiar issues that we encounter in rural India?

To minimize the effect of an erratic retail distribution system we propose to estimate readership using the Frequency method in place of the Recent Reading Method. In the Frequency method, readership is estimated by allocating an average reading probability to all the respondents who claim that particular frequency of reading.

The logic of using this model is that if the distribution is regular the difference between the observed and expected probability is small, then the estimate of reading would be the same in both the Recent Reading Model and the Frequency Model. In the case of erratic retail distribution, the difference between the observed and expected probability is higher and hence using the Frequency Model maybe more accurate. This has been validated and the findings have been presented at an earlier symposium.

We believe that in the group reading situation, only the person who is reading to the group be considered as a reader. This is because the other members of the group may not be able to recognize the masthead correctly. Further, the readership estimates are used as a buying currency for the print advertising industry, therefore, the readership assessment should include only those individuals who are physically exposed to the publication and are potentially exposed to the advertising in the publication.

Conclusion

The Indian print scenario is getting complicated. As the publication houses look at different ways and means to grow their reader base, their offerings are getting more and more complex. These are posing significant challenges to the way we approach the readership measurement.

As we have discussed in this paper, print researchers will have to constantly and creatively work towards finding solutions to tackle the growing complexity.

Our latest proposal to the industry is a reflection of this philosophy of change and adaption.