AUSTRALIA: BUILDING A 21ST CENTURY READERSHIP SURVEY

Andrew Green, Ipsos MediaCT
Heather White, Newscorp Australia

Background

In the spring of 2010, TheReadershipWorks in Australia issued an RFP seeking a proposal to re-think readership measurement from root to branch and to outline a method that would meet the demands of publishers, agencies and advertisers in the digital age. Ipsos was awarded the contract in September of that year.

Major changes were being faced by publishers as reading rapidly migrated to digital platforms. Smaller regional titles had challenges being measured on a national survey and a new toolkit was needed for helping agencies to better understand and recommend the medium to their clients.

Survey research faces its own challenges, in Australia as elsewhere, including falling response rates and rising costs. These also had to be addressed.

The market had been accustomed to working with the same supplier for more than forty years, with the fundamental approach unchanged during this time and considerable resistance to change from the supplier.

That supplier – Roy Morgan Research – had no plans to discontinue its service. This meant that the new readership survey – dubbed 'emma™' (Enhanced Media Metrics Australia) would be launched into a fiercely competitive market. This is rare in the world of audience measurement. Normally, either a research company launches a survey at its own commercial risk or there is a tender controlled by all or part of the industry. Either way, an effective monopoly is created, with a single, pre-agreed 'currency' for planning and trading in the marketplace.

Calendar of Events

Having recommended a series of innovative methodologies during the pitch – quite different than those employed by the existing supplier - it was important that they were fully tested and piloted before releasing the new survey to the market.

As a result, Ipsos spent much of early 2011 working on a set of 'mini-pilots' to test some of these methods, as well as looking at the wording of questions and the presentation of stimuli to respondents. Following this, we ran a reduced-sample survey to analyse the results and any learnings that arose.

In the fourth quarter of 2011, fieldwork began on the full sample. Learnings continued to be fed back to a Technical Committee of industry and independent experts, who stress-tested every aspect of the study and made changes where needed. After a number of modifications were made, official data collection was launched in January 2012. After collecting 18 months of data, the survey was launched in August 2013.

The Challenge of Multiple Currencies

emma™ is not the first readership survey to have been launched into a market with an existing readership currency. In 1979 in the United States, MRI entered a market which had, since 1962, been dominated by the Simmons company. Simmons employed a 'thru-the-book' methodology, employing stripped down issues of magazines as prompts to respondents asked about reading of the particular titles being shown. MRI, in contrast, used the 'recent reading' approach to measure the number of people reading any issue of a given magazine over a stated period related to its frequency.

The number of titles measured and the overall readership levels reported by MRI were considerably higher than those reported by Simmons. Relative differences between titles, however, were fairly close[i].

Given the competitive context, MRI had battles to fight on several fronts. Primarily there were two: the technical battle of methods and the marketing battle to sell a new survey into a notably conservative industry used to another one. Related to the second was the softer area of client servicing and attitude – Simmons had arguably become arrogant over the years and resistant to change. MRI set itself up as a more open, transparent and customer-friendly organisation. This was to pay off for the company in the battles to come.

The late 1970s and early 1980s were a time when every publisher and every advertising agency employed full time media research experts. As a result, debate raged at conferences and in the trade press about which method was more accurate, with validation surveys and clever analysis used to defend both points of view. It was also a time when publishers were being challenged by a burdening television industry. Cable TV was increasing choice to viewers and advertisers, putting pressure on advertising revenues and consumer time.

Fast-forward to 2013 Australia. Ipsos had introduced a new methodology for measuring newspaper and magazine readership. The readership numbers the new method generated were very different to the ones being used in the market. There was, as there had been in the United States 30 years before, a technical battle to win and, in parallel with this, a marketing battle. Moreover, with the industry much more heavily using technology than in the past, there were IT and software challenges, as well as far greater training needs to be catered for.

The Technical Approach

With a fast-changing medium, it was clear that the measurement solution had to be changed to meet a whole new set of needs from the industry. As well as a measurement solution which was accurate and reliable, there was a real need for an approach which would be future-proof, which could adapt in line with changes in how publishers operated across multiple platforms, not just print. It is important to recognise that when the RFP was issued the iPad has not yet been launched!

TheReadershipWorks (the organisation set up to manage the pitch process and the subsequent survey) were open to making significant changes to the methodology in order to future-proof it, but also required a thorough understanding of the implications of these changes. This required exhaustive testing, some of which are detailed below. All in all there were some forty different tests conducted prior to market launch. These included:

- **May – July 2011**

    - A Reduced Sample 'Proof of Delivery' survey, carried out nationally, to test the impact of various innovations.
    - n = 4,000
    - n = 1,002 F2F CAPI, n = 2,998 CATI to online
    - 2 minute reading filter
    - 12 month group filter for magazines by genre
    - Last time read previous to last 7 days (to calculate frequency for newspaper reading)

- **June – July 2011**

    - A 6-week validation diary to test frequency measures for newspaper reading
    - n=1,000 online respondents completed a weekly diary over 6 weeks

- **June 2011**

    - Qualitative testing of "engagement" for newspapers and magazines, including testing of scaling and code frames

- **August 2011**

    - Regression analysis into the demographic drivers of newspaper and magazine readership to help build weighting scheme
    - n = 3,000 online survey in Melbourne

- **August 2011**

    - Qualitative testing of mode effect of online versus personal interviews

- **August 2011**

    - Definition of reading testing
    - n = 3,000 online survey, Melbourne
    - Impact of cutting back reading description and increasing emphasis on "read for 2 minutes or more"
    - Impact of going straight from removing magazine *genre* 12 month filter and using a 12 month filter by title instead of both
    - Impact of not providing a reminder to "not sure" (respondents given a choice of 'yes', 'no' and 'not sure' of reading each title)

- **July 2012**

    - Optimum number of covers to be used to measure magazines – to reduce impact of suspected over-stimulation
    - Impact of adding a "recency" question as well as covers
    - n = 2,586 online surveys nationally

- **September – October 2012**

    - Testing of fusion with online measurement

- **November 2012 – January 2013**

    - Testing of passive, on-device measurement of mobile and app usage with a separate panel
    - n = 400 pilot

- **May 2013**

    - Further testing & refinement of "engagement" questions
    - n = 2,600 online surveys nationally using publisher reader panels
    - Testing scales and statements using more tailored statements to newspapers and magazines

- **June 2013**

    - Reach & frequency testing
    - Duplication of audience over time for individual publications
    - Duplication of audience across publications

These tests were conducted by Ipsos with oversight from the Technical Committee. This consists of technical representation from each of the publishers, from the Media Federation of Australia (representing media agencies) and two independent research specialists. Plus before any significant change could be signed off, it was verified by an independent auditor to ensure probity.

To understand the degree of testing undertaken it important to appreciate the context in which these tests were undertaken. They were not only to give publishers confidence and surety in the results, but more importantly to provide explanations to the market (advertisers and media agencies) about why the results from emma™ would differ from those of Roy Morgan Single Source.

The following results were observed as a result of this testing.

- Online respondents chose more titles than those responding to a face-to-face survey, leading to higher readership for all titles. This was especially true for magazines, where a full rotation of titles, compared to a standardised printed booklet with minimal rotation, resulted in all titles having an equal chance of being seen and hence reading recalled.
- Interviewing across all days of the week. This minimised memory bias for newspapers and resulted in higher readership for titles appearing earlier in the week than weekend-only interviews had recorded. This resulted in higher Average Issue Readership (AIR) claims for newspapers.
- Showing the most recent on sale magazine covers, as well as two older issues, minimised memory bias for magazines compared to using a single aged cover. The impact of using the most recent on sale cover is most evident amongst bi-monthly magazines (those published every 2 months) where a cover 8-12 weeks after its initial on sale were shown previously.
- Showing front covers for weekly newspaper inserted magazines does result in a more accurate, but lower, Average Issue Readership (AIR) than the use of a masthead logo.

But this increase in AIR has been mitigated to some extent by increased duplication. The result is more overall readers, but these readers are also reading more titles and reading more often.

The table below shows the impact of these AIR results.

	Gross Audience		Index
	Roy Morgan Single Source*	emma™**	
Weekday newspapers (National/metro)	5,442,000	7,738,000	142
Weekend newspaper(National/metro)	12,972,000	13,144,000	101
Weekly magazines	9,916,000	12,832,000	129
Monthly magazines	23,236,000	31,398,000	135
Other magazines	2,310,000	3,688,000	160

* Source: Roy Morgan Single Source 12 months ending June 2013, All people 14+ Australia

** Source: emma™ conducted by Ipsos MediaCT, 12 months ending June 2013, People 14+

The Technical Solution

The methodology employed by Ipsos for emma™…
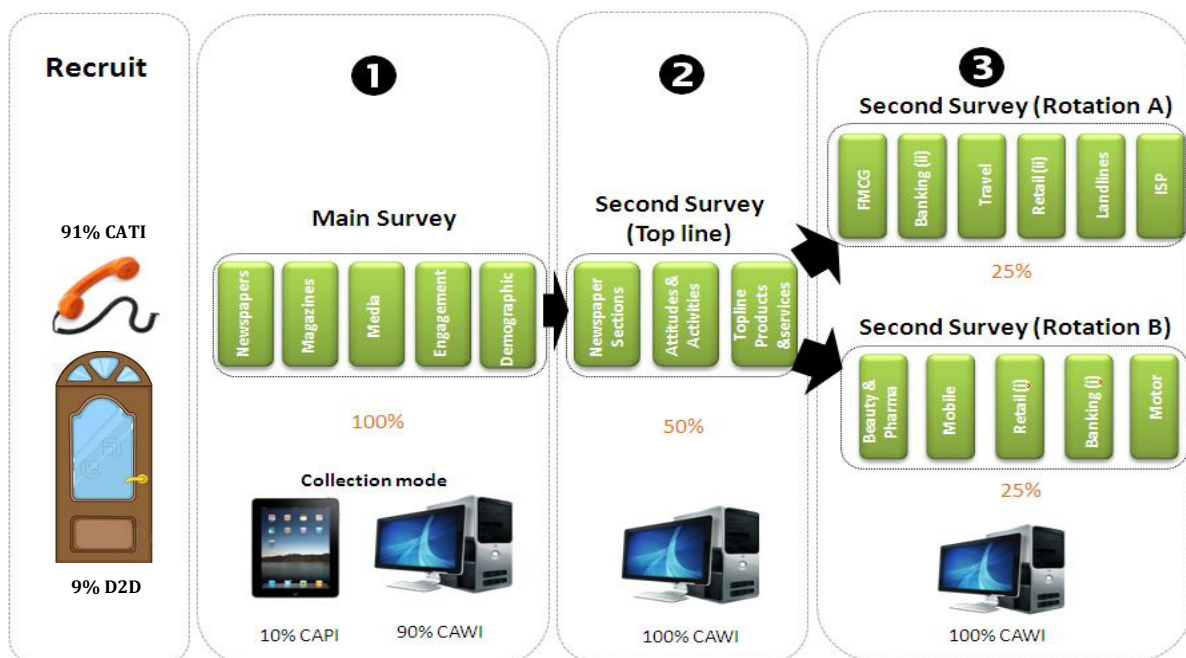
Recruitment: CATI recruitment interviews, including landline and mobile-only households, plus recruitment via door to door in close proximity to those recruited for a CAPI interview by CATI.

1:     CAWI completion of 90% of the Main Survey, which includes the principal audience measures. 10% of completions employed CAPI using iPads to deliver a total of 54,000 interviews per annum.

2:     A Second Survey, which is fielded to all those completing the Main Survey (around half of those who complete the first survey also complete the second). Part of the survey (known as 'Topline') is fielded to all respondents.

3:     There are then two rotations of the second survey, designed to reduce respondent burden by only asking individuals about half the product categories and using the topline survey to form the basis of ascription.

These 54,000 interviews include supplementary booster surveys for smaller regional titles, which would never normally be measured accurately with a pure random sample. These surveys are used to model readership for other small regional titles to be included a single database which provides audience measures for 600+ titles.

The main survey also includes data hooks to allow fusion of the Interactive Advertising Bureau (IAB) approved currency audience measure (carried out by Nielsen Online) into emma[TM] to provide unduplicated print and web audience measurement. This uses the most accurate available methodology for individual platforms – aided recall for print and passive panel measurement calibrated to traffic for web – to deliver true cross platform measurement in Australia for the first time.
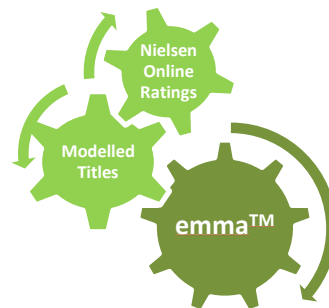
It also provides the opportunity to fuse other media data currencies such as TV ratings and mobile passive panel audience data in the future.

So how is print readership actually measured?

All titles are grouped by type and a 12 month filter is used (for the first time in Australia). A colour masthead logo is used as stimulus for all titles at the filter stage.

Below is an example as used for magazines, which are grouped by genre, in this case food and wine titles.

For newspapers the masthead logo is used in all subsequent questions. Readership over the last 7 days going backwards, day-by-day from "yesterday" over the previous week is asked, followed by frequency of reading the title. Weekday and weekend titles are measured separately. Readership over the Last 7 days is used to calculate Average Issue Readership (AIR) and the frequency measures are used as inputs into the reach and frequency model.[ii]

For magazines and newspaper-inserted magazines (NIMs), the masthead logo is only used for the 12 month filter question. The Average Issue Readership (AIR) question uses front cover recognition with the three (3) most recent issues shown to respondents. Only one cover is used for Average Issue Readership. For paid magazines this is the oldest cover, while for newspaper inserted magazines this is the youngest cover.

This is to account for the different ways these type of magazines are consumed. Newspaper inserted magazines have very little in the way of audience accumulation, being read very quickly after distribution, while paid magazines do accumulate audience over time.

Marketing

Australia is a market where combat is an integral part of daily business life. So the marketing part of launching emma™ was key to getting buy-in from as many industry players as possible, as soon as possible. TheReadershipWorks in conjunction with Ipsos planned a complete package of marketing activities both before and after launch to ensure that awareness of the new survey and its advantages were maximised amongst key decision-makers.

A specialised Go To Market (GTM) working group was formed, which included trade marketing and corporate affairs specialists from the publishers and marketing leads from Ipsos and TheReadershipWorks. This created buy-in to the whole process amongst key stakeholders and utilised the expertise of specialists in PR and trade marketing, skill sets not usually associated with research companies.

Activities broadly fell into seven areas:

1. A print campaign, which employed a range of eye-catching executions and ran in the trade press and one or two newspapers;

2. A digital campaign, which ran on major trade press and publisher websites;

3. A number of events were held in and around the week of launch, including special research symposia targeted at the research community and more top line/social types of event across the key capital cities of Australia);

4. Video materials were created, including a series of interviews with well-known media agency planners on how they were going to use the survey (known as 'the sizzle reel'), as well as video coverage of the research symposia;

5. PR and social media. Our goal was to get the industry talking about the new survey well before launch (to the extent that people talk about new surveys...). In this we succeeded to a large extent. emma™ now has its own LinkedIn and Twitter sites, which are used to broadcast our own messages and to receive user comments and feedback.

6. Sales collateral of various kinds has been produced, including brochures and special reports on key product categories such as retail;

7. Finally, a website, emma.com.au, was built both as a public channel for accessing emma™ news and updates and as a portal for delivering training and educational materials to subscribers.

All this was, of course, alongside face-to-face meetings with all the key publishers, media agencies and advertisers who we needed to both use and hopefully subscribe to the study.

Software

It was determined early on that emma™ would be offered on an open software platform. The data is available on any accredited software package, providing a Gold Standard is adhered to (available Q4 2013).

Training and Other Logistics

The launch of emma™ to the market involves considerable change on the part of not only publishers but also media agencies and advertisers. Roy Morgan Single Source has been the *de facto* print currency since the 1980s and change management practices needed to be incorporated into the training program.

A specialised Learning & Development working group was established, which included change management and training specialists from the publishers, as well as training leads from Ipsos and TheReadershipWorks. This was to ensure it was not just technical training, but that the building blocks for the change in behaviour required would be incorporated into the overall programme.

The Learning & Development programme needed to cater to the needs of around 50 different clients – big and small publishers plus media agencies. It also needed to cater for the needs of those people selling and those buying advertising and to be tailored to their specific role – direct and agency advertising sales, trade insights and analysis, media planning and buying – all of whom will need to utilise emma™ in different ways.

Australia is a big country, so those 50 or so clients are spread over a geographically diverse area, with minimum training coverage required in Sydney, Melbourne, Brisbane, Adelaide and Perth. This adds up to around 200 different sites which require training and software installation.

To date 180 face-to-face training sessions have been conducted – mostly with publisher clients. It is expected that as many media agency training sessions have yet to be conducted (as we write, in August 2013), it likely that number will grow to about 300.

So far over 2,000 people have been trained, with the expectation this will increase to over 3,000 once agencies are trained.

The importance of the publisher sales teams in the advocacy of emma™ cannot be ignored. They are the foot soldiers in the battle for emma™ to become the accepted readership currency amongst media agencies and advertisers. With this in mind, considerable effort was directed at the learning and development programme. There were two parts to the training:

1. Introduction to emma™ and the advantages it delivers;

2. How to use emma™ in their jobs.

The training sessions were 2-3 hours in duration, depending on whether their client base was direct (2 hours) or agency (3 hours).

In addition to the programme run by Ipsos, individual publishers also had their own training focusing on objection handling and the implications of the results for individual brands.

For the more technical users, in addition to the training on emma™ given to the sales team, more technical detail about the mechanics of the methodology was required. Plus, extensive training in Datafriend software, one day minimum training to be allowed to access the software, and a further day to be considered of "Super User" status.

Ipsos and TheReadershipWorks are in the process of developing an accreditation scheme for emma™ and a user recognition programme to keep up enthusiasm and usage post the launch hype. A long term strategy beyond the first few weeks in market is required and an ongoing Learning & Development program is key to this.

Conclusion

More than three years have passed since work started on developing Australia's new readership currency. Ipsos and the publishing industry believe strongly that the innovations introduced deliver a far more accurate picture of how Australians read, which has been inspired by developments in other markets such as the UK, France and the Netherlands over recent years. All these have been carefully adapted and tested in the Australian environment.

Approaches such as the online collection of data, use of magazine front covers to aid readership recall, modelling of smaller titles and fusion with other surveys to reduce respondent burden are likely to be part of the future for many more surveys as we move forward.

---

[i] Joyce, Timothy (1981). *The Level of Magazine Reading*. Proceedings of the Worldwide Readership Symposium, 1981
[ii] Green, Andrew and White, Heather (2011). *Improved Planning and ROI Measurement For Newspapers: Estimating Campaign Reach & Frequency Over Time.* Presented at Print and Digital Readership Forum San Francisco 2011