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## Readership Research

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### TODAY & TOMORROW

presented by Gary Morgan

to the Market Research Society of Australia (NSW Div.)

It is now ten years since we established our continuous readership survey which covers magazines and daily, weekly and suburban newspapers.

First, I will outline what we have achieved:-

1. Each year we publish two six-monthly reports covering the same periods as ABC circulation figures: October - March and April - September.  
This is important as the daylight saving in some States affects readership.
2. Our survey covers both city and country areas in all States.
3. The survey is based on a large sample. We now interview more than 26,000 people a year. This is more than double our competitor's sample.
4. We interview enough people in each State to estimate readership of daily and local newspapers.
5. Our 27 demographic questions are comprehensive. Recently we have extended them further to include questions on the number of people in households who work full-time and part-time; and included questions on breadwinner's income as well as personal income.
6. Product data is asked on the following:-
  - a) Intention to buy a new or used car; Makes and models preferred.
  - b) Ownership of cars; Brand of petrol mostly bought.
  - c) Intended interstate and overseas air-travel, which includes airline preference and destination.
  - d) Travel in Australia. Details obtained include mode of transport and airlines used, reasons for travel, where visited, accommodation used.
  - e) Smoking of cigarettes, cigars and pipes, including brand information.
  - f) Consumption of soft drinks, fruit juice and milk.
  - g) Consumption of alcoholic beverages such as beer, wine, whisky, brandy etc.

7. In addition, we obtain from respondents the number of hours a week they spend viewing commercial TV and listening to commercial radio.
8. In Sydney and Melbourne, we have recently started asking respondents questions on viewing of specific TV programs. This survey was initiated by News Ltd. and Young & Rubicam. When completed it will be available on a subscription basis to all publishers, other media and advertising agencies. The data will enable evaluation of multi-media schedules.
9. The Australian Social Barometer which is Australia's only large scale Psychographic Survey combines psychographic data, readership, product usage and demographics.
10. We introduced the re-interview method to measure cumulative reach of newspapers and magazines.
11. The results from our re-interview survey are used to help media planners construct media schedules using combinations of publications. To help in schedule evaluation and construction, we introduced COSMIC which is a computerised print-media planning system. (Attached is a summary of the system and examples.)

Media Planners use readership surveys because they need an objective and accurate measure of who reads which publication. Knowing this information obviously helps Media Planners design the most cost efficient media buy of newspapers and magazines.

Even though we have achieved the above, there are still problems with readership surveys. The best way to describe these problems is to give examples.

#### Estimates of Readership

Recently Sungravure suggested the use of "readership estimates" for Woman's Day, based on estimated circulation figures and readers per copy, from a previous circulation period.

A corner-stone of objectivity is that the variables in any equation are measured at the same time. Sungravure has taken the Woman's Day "readers per copy" figure from one time period (obtained by dividing readership in that period by circulation in that period) and combined that figure with their estimate of the current circulation figure for the new Woman's Day/Woman's World!

This is a gross misuse of readership data. If circulations have changed dramatically, then it cannot be assumed that "readers per copy" is constant. The proper thing to do is conduct a special survey, or wait for the results from the next readership survey.

Further, the assumption that duplication patterns and casualness are not significantly affected by changes in readership levels is also false. It can easily be shown that casualness factors (which all magazine and newspaper publishers use) vary with readership levels within a publication group.

In March, our readership survey covered the new Woman's Day/Woman's World. We then interviewed 1,205 women. You'll see our March results are considerably different from the Sungravure estimates!

	Women Readers		
	Morgan	Sungravure	Difference
	March	Estimates	
	Results	Estimates	Difference
	%	%	%
Women's Weekly	39.9	45.0	-5.1
New Idea	27.8	34.5	-6.7
Woman's Day including Woman's World	23.1	32.7	-9.6

#### Inflated Readership Results from Surveys

In January this year, results of a survey were released in the USA on how magazine audiences are estimated. The study was executed by the Simmons Market Research Bureau Inc., and managed by Hilda Stewart and Jack Maloney of the Advertising Research Foundation.

Simmons "recent reading" data, using methods similar to those used for the British National Readership Survey, and by McNair Anderson in Australia, showed audience levels significantly higher than those obtained by the through-the-book method. The Comparability Subcommittee commented: "Recent very large and unanticipated increases in recent reading audience levels heightens our concern about the validity of this technique". Similar concern, of course, is also widespread in Britain.

At a recent Esomar Seminar in West Berlin, Ian Muir, of McNair Anderson, admitted criticism (by both publishers and agencies) that their "estimates of average issue readership, particularly for magazines, are higher than common sense would dictate". He also said that their readership survey "very closely followed the British NRS questioning techniques".

We have shown that the most accurate way of estimating readership of weekly magazines is to ask whether they have been read in the last week. With monthly publications, respondents are shown photographs of the front covers of the magazines. Specific issues could be used, but it would be costly, and inconvenient for interviewers. The monthly issues used are usually 10-12 weeks old.

McNair Anderson and the UK NRS ask people being surveyed, whether they have read any issue of the monthly publication in the last month, not a specific issue.

McNair Anderson and the NRS obtain inflated readership figures because of the following reasons:-

- 1) People can't accurately remember if they read a monthly publication in the last month or whether it was two months ago.
- 2) There is the problem of replicated readership. Assume a person takes two months to read one particular issue of monthly Magazine "A". Also assume that person during those two months reads only that one issue of Magazine "A". If that person is interviewed at any time from the period when he started reading that issue of Magazine "A" until one month after he finished reading Magazine "A", then that person would say he had read Magazine "A" in the last month. If the whole population is like that person and all read only every third issue of the monthly Magazine "A", and take two months to read it, then all when interviewed would say they are readers of Magazine "A"! The results would show in this extreme example, that 100% of the population read Magazine "A" although the true average issue readership figure is  $33\frac{1}{3}\%$ !

To show that our methods obtain accurate results, last year we conducted a series of experimental surveys using Reader's Digest.

The surveys covered interviewing different, but comparable, Australia-wide cross-sections of approximately 1,100 men and women aged 14 and over.

Respondents surveyed were shown one or more of the following:-

- (a) The actual front cover of a Reader's Digest,
- (b) A photograph in black and white of the front cover of a Reader's Digest, or
- (c) A specific issue of Reader's Digest.

The following are the results obtained:-

		Sample Base	Australia-wide		
			Total %	Men %	Women %
<u>July Issue</u> (Surveyed in September 1979)	Actual cover	(1,152)	16.4	15.4	17.3
	Specific Issue	(1,152)	14.8	13.9	15.7
<u>August Issue</u> (Surveyed in October 1979)	Actual cover	(2,475)	14.9	14.2	15.7
	Photographed cover (Black & White)	(2,344)	14.4	13.0	15.8
	Specific Issue	(1,201)	12.8	11.7	13.9
<u>September Issue</u> (Surveyed in November 1979)	Actual cover	(1,135)	16.0	17.4	14.7
	Photographed cover (Black & White)	(1,296)	15.5	15.5	15.5
<u>October Issue</u> (Surveyed in December 1979)	Photographed cover (Black & White)	(2,147)	16.4	17.1	15.9

The above table shows the readership levels we obtained were similar using either of the three methods. In the same period McNair Anderson estimated that Reader's Digest had a readership of 26.0% for all people, 27.1% for men and 24.9% for women.

#### The Future

We will soon be releasing data on TV viewing in combination with newspaper and magazine readership data.

In addition, we will be establishing our new TV meter service on an experimental basis in Melbourne. As soon as it is running smoothly, we will extend it to Sydney.

Recently with our Consumer Panel we have included questions on readership of magazines and newspapers. We have also included questions on frequency of TV viewing and radio listening. This information will enable us to show whether readers of particular publications have different purchasing habits from non-readers. We will also show what effect frequency of TV viewing and radio listening have on purchasing habits.

We will not be recording which advertisements people have seen, but we will be able to provide useful measures on the effect of advertisements placed in a media. For example, for a product advertised in a national women's magazine, in any given month, we will be able to compare trial and repeat buying among readers and non-readers in that same month.

Finally, I'd like to thank all those people involved with using Media Research who have supported us during the last 10 years.