

6.2

READERSHIP SURVEY ENRICHMENT

BACKGROUND

During the last five years there has been a rapid growth of private networks in advertising expenditure in Italy. As a result of this trend, total expenditure in TV - (national and private) - has recently exceeded press advertising expenditure.

This expansion of private networks has on the one hand, encouraged growth in total advertising expenditure (which went from about 0.3% of GNP in 1979 to about 0.5% of GNP in 1984 - a more realistic level for an industrialised country), and on the other hand, has brought about a highly competitive situation for magazines (especially as regards some particular segments).

REACTIONS OF MAGAZINE PUBLISHERS TO THE COMPETITION OF PRIVATE NETWORKS

Naturally, magazine publishers have attempted to react individually to the new market situation by adopting appropriate policies according to the characteristics of their titles and of their respective market segments.

In the framework of this increased competition by private networks, magazine publishers have also, to date, carried out two collective surveys, aimed at bringing to light some magazine 'pluses' compared with TV.

More specifically:

(a) 'Media & Marketing' research, conducted in 1982. In this research the consumption behaviour of the population was analysed with respect to 125 products/services, related to magazine reading and to TV exposure.

The following conclusions were drawn:
- compared with TV, magazines are most efficient in reaching segments of 'heavy consumers' for the majority of the products/services analysed. (Jannacone, 1983).

(b) The innovations introduced in the last National Readership Survey concerning the public's 'actual exposure' to the two media - magazines and TV. This experiment is illustrated in this paper.

INNOVATIONS INTRODUCED IN THE LAST NATIONAL READERSHIP SURVEY (ISPI)

In order to have a better estimate of the 'actual' exposure to two important mass media - magazines and TV - in the last ISPI Survey, in addition to the traditional readership data (in terms of head counting) the following information was also provided, representing an innovation in the Italian market-place:

- (1) Average number of contacts of the average page for each title
- (2) TV exposure from 9 pm to 11 pm of readers of each title on the day before the interview.

Average number of contacts of the average page for each title

This information was obtained through an aided recall type approach (therefore not in terms of page traffic as in the United States) formulated as follows:

(1) A battery of questions (see Appendix) designed to assess 'by title' and 'in the last period' the following data:

- average number of contacts
- percentage of pages 'read/seen' during the last contact.

(2) 'Probability' estimate of the average number of contacts, using the formula: $C = pv$, where:

c = the average number of contacts of the average page
 p = the percentage of pages 'read/paged through' during the last contact
 v = the number of times the magazine (any issue) was picked up (to be read/paged through) in the last period.

TV EXPOSURE FROM 9 PM TO 11 PM ON THE DAY BEFORE THE INTERVIEW

This information, similar to the British procedure (JICNARS), was included in the data supplied by ISPI, and has the following characteristics:

(1) Limitation of the information to the two most important hours of 'prime time' (70% of total TV advertising expenditure is concentrated between 9 pm and 11 pm).

(2) Information is supplied solely in respect of the readers of each title (in line with the ISPI specific objective of providing information about the readership of the periodical press).

Information on the average number of contacts of the average page and on TV exposure from 9 pm to 11 pm has been published separately for each title, and for the universes of total adults, men, women and housewives.

OTHER CHARACTERISTICS OF THE LAST ISPI SURVEY

As regards ISPI 1985, attention is drawn in particular to the following aspects:

Method

Two fieldwork cycles - Spring and Autumn of 1984 - were amalgamated. The total number of interviews for the two cycles was 16,782. The definition of 'reader' was the same as in the previous years. The innovations ('average number of contacts per page' and 'TV exposure') started with the second cycle of the survey (Autumn 1984).

Universe represented

Individuals aged 14 years and over (45,530,000). This was an innovation introduced this year (the previous 'threshold' had been 15 years) so that the universe can be maintained in

keeping with actual developments in the readership habits of the population.

Market research agencies

The same as in the previous years: Doxa, Makrotest, Abacus and Explorer (the latter was used for controls on sampling and fieldwork).

RESULTS OBTAINED FROM THE INNOVATIONS IN THE LAST ISPI SURVEY

(1) Number of contacts of the average page for each title

Results are shown in Tables 1 and 2 for weeklies and monthlies respectively. To provide a better overview, the results below are grouped by 'segments' of periodicals.

TABLE 1
Average number of contacts of the average page

Average results by segments of weeklies

Women's A	1.6
Women's B (picture stories/leisure)	1.6
News magazines	1.6
General interest	1.5
Television and TV guides	2.1
Children and youth	1.6
Sport	1.6
Sewing and knitting/cookery	2.0

In particular, the following remarks can be made:

Among weeklies, the average number of contacts per page varies ('in the last period') from a minimum of 1.5 for general interest magazines to a maximum of 2.1 for Television/TV guides magazines.

Among monthlies, the same index varies from a minimum of 1.6 for general interest magazines and news magazines, to a maximum of 2 for fashion magazines (men's and women's) and sewing and knitting/cookery magazines.

TABLE 2
Average number of contacts
of the average page

*Average results
by segments of monthlies*

Sport/cars/motor-cycles	1.7
Travel/tourism/nature	1.8
Photography/hi-fi	1.8
Science and electronics	1.7
Furnishings/architecture/ architecture/Do-It-Yourself	1.8
Sewing and knitting/cookery/table	2.0
Men's and women's fashion	2.0
Health and personal relations problems	1.7
Children and youth	1.8
News magazines	1.6
General interest	1.6

Apart from Television/TV guides magazines, monthlies clearly tend to have a higher average number of contacts per page than weeklies.

**(2) TV exposure from 9 pm to 11 pm
on the day before the interview**

Results are shown in Tables 3 and 4 for weeklies and monthlies respectively.

In this case, too, for a better overview the results were grouped by 'segments' of periodicals.

From the above tables, some interesting hints can be derived on the actual TV exposure of readers of each segment of periodicals:

- Among weeklies, 38.8% of readers of the news magazines segment had not watched TV from 9 pm to 11 pm on the day before and a further 21.7% of these readers had watched TV for not more than one hour.

Among readers of Women's A, children and youth and sporting magazines one-third had not viewed TV on the day before. However, it should be noted that among readers of TV guides,

general interest and sports magazines nearly half had watched TV for more than one hour on the day before the interview.

- Among monthlies, it should be noted that over 40% of readers of travel/tourism, photography/Hi-Fi and science and electronics magazines had not viewed TV from 9 pm to 11 pm on the day before the interview. About 50% of readers of health/personal relations and knitting and sewing/cookery magazines had in fact viewed TV for more than one hour.

CONCLUSION

The innovations introduced into our National Readership Survey (ISPI), as illustrated in this paper, are very recent and at the time of writing no experience is as yet available on the concrete effects of this new information.

TABLE 3
TV exposure during prime time:
9 pm to 11 pm

*'Yesterday' audience,
by segments of weeklies*

Readers of: (= 100)	Up Total to audi- one ence hour	More than one hour	No audi- ence	
Women's A	69.5	19.4	50.1	30.5
Women's B/ picture story/ leisure	70.8	24.1	46.7	29.2
News magazines	61.2	21.7	39.5	38.8
Gen. interest	70.5	23.0	47.5	29.5
Television and TV guides	71.7	22.6	49.1	28.3
Children/youth	65.9	21.7	44.2	34.1
Sports	65.3	17.8	47.5	34.7
Sewing and knitting/ cookery	69.4	16.7	52.5	30.6

TABLE 4
TV exposure during prime time:
9 pm to 11 pm

Readers of (= 100)	'Yesterday' audience, by segments of monthlies			
	Total	Up to audi- ence	More than one hour	No audi- ence
Sporting/cars/ motor-cycle	65.8	21.0	44.8	34.2
Travel/ tourism/nature	59.3	20.8	38.5	40.7
Photogr./hi-fi	58.5	25.6	32.9	41.5
Science/electr.	53.1	24.7	28.4	46.9
Furnish/ Arch/DIY	67.2	20.5	46.7	32.8
Sewing and knitting/ cookery	72.7	21.8	50.9	27.3
Men's/women's fashion	64.6	18.4	46.2	35.4
Health and personal relations	65.1	14.5	50.6	34.9
Children/youth	60.9	20.0	40.9	39.1
News magazines	62.0	22.8	39.2	38.0
Gen. interest	67.7	21.0	46.7	32.3

We can only say at the moment that the decision to supply advertisers with the above information (in order better to evaluate the actual exposure of magazine readers to the two media - magazines and TV) has aroused great interest, above all in respect of the average number of contacts of the average page: this last innovation has been particularly appreciated because it enables media planners to operate while having at their disposal not only the traditional 'average cost per reader', but also, for the first time in our country, the 'actual average cost per contact' (where 'total contacts' are obtained by multiplying the number of readers by the average number of contacts of the average page).

APPENDIX

Questions asked about magazines read or paged through 'in the last period'

Q - Now, tell me: specifically *that last time* you picked up the magazine ... how many pages of that copy did you read or page through? Even if you do not remember exactly, tell me approximately if that last time you read or paged through

- all pages
- nearly all pages
- about three-quarters
- about half
- about a quarter
- less than a quarter
- only a few pages
- do not remember

Q - Specifically for *that issue* of ... you picked up that last time: was it the first time you had read or paged through it, or had you picked up the same issue on other occasions?

- the first time
- already picked up on other occasions
- do not remember

Q - Besides that last time you read the magazine ... have you had the chance of reading *on other occasions* the same copy or *different copies* of ... over the last seven (30) days? From last ... (same day week/previous month) to today, just think of *how many times* (besides the last time) you have had the chance of picking up any copy of the magazine ...?

- no other times
- one other time
- two other times
- three other times
- four other times
- five other times
- six other times
- seven other times
- eight other times or more
- do not remember

REFERENCE

Jannacone, Constantino (1983) 'Press versus TV: readers are better consumers than TV viewers' (Montreal Proceedings).