HARMONISATION OF PRESS RESEARCH METHODOLOGIES IN SOUTH-EAST-ASIA: DREAM, OR VIRTUAL REALITY?

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Synopsis

This paper addresses the issue of harmonisation of readership research methodologies in South-east Asia. Establishing that it is an important objective for the major buyers of readership research - which in South-east Asia tend to be advertising agencies rather than Media owners - it looks at how the various readership surveys compare on more than a dozen measures.

The paper goes on to judge readership research in the region against the principles set out by the EAAA in 1992. It then looks at some of the readership results and how they compare between countries, focusing as much as possible on general measures rather than specific figures for different titles.

It concludes that South-east Asia is a lot further down the road to harmonisation than Europe.

This paper addresses four basic issues. First, is harmonisation of media research methodologies an important objective to aim for; if so, just how important should it be in our scale of priorities as an industry?

Secondly, what exactly, in readership research, should we be harmonising given the wide variety of possible measurement techniques in existence - has a "best way" of doing things been in fact established?

Thirdly, to what extent do the current readership surveys in South-East Asia conform to the principles of harmonisation set out in the recent EAAA paper on the issue and to other, more technical points that we know can affect AIR results?

Finally, apart from looking at these methodological questions, are there clues we can look to in the results of the readership surveys to suggest that we are reflecting the reality of how people read newspapers and magazines in what are, inevitably, widely differing cultural and economic marketplaces?

Turning to the first point, it is clear that if we are all to listen to our ultimate customers -the advertisers - harmonisation is an important objective. If we just look at a list of the top ten advertisers in Singapore, we can see that many of these are major advertisers in most of the other Asian countries. Doubtless at head office level, "Asia" will be treated as a region of the world, as will Europe. Performance in every aspect will be compared across countries, meaning that we have got to define things so that like really is being compared with like. Turnover, profits, personnel costs and so on will be compared, as well as the value of the products and services being purchased. Audiences will, of course, be one of the "products" being purchased with the marketing budget.

If we look at our major direct customers, which in 6 out of 8 of the South-East Asian countries happen to be the advertising agencies, we can again see that many of the major players are common across all the countries - Saatchi, Y&R, McCann-Erickson, Ogilvy & Mather, Leo Burnett to name a few.

These companies also operate on a regional basis, many with regional media directors and close working relationships within Asia and Europe.

We can never hope, by precisely replicating research techniques from one market to the next, to be able to achieve exact comparability of results. This would be like trying to fit the proverbial square pin into a round hole. Countries within Asia, within Europe, within the Americas and, of course, between these continents remain inexorably different culturally, economically, politically and demographically.

One quite simple parallel can be drawn to illustrate the difficulty of trying to achieve comparability of results through standardisation of methods. This parallel lies in the way governments measure changes in consumer prices. Measurements of Consumer Price Inflation (CPI) traditionally exaggerate the true rate of price inflation for two reasons.
First, the measure - which is based on price changes for a "basket" of goods and services thought typical of a consumers' shopping list - fails to adjust for any improvements in quality that may occur. A television in

1993 is a good deal more expensive than was a television in 1973 - but then it is a much better and more reliable piece of equipment.

More technically, the weights used to add together the prices of the different goods and services within the "basket" go out of date rapidly. In particular, consumers are likely to shift from more expensive to relatively less expensive goods over time which, in theory, should mean downweighting the more expensive goods in the index as this happens. In practice, however, such adjustments are made only sluggishly - the CPI here in the USA, for example, is based on spending patterns ten years ago.

This example serves to show both that a research methodology itself may suffer from flaws and that the degree to which the same methodology suffers can vary from market to market.

In the media area, television has gone a long way down the road to harmonising its basic research methodology: in the USA and Canada, in all eighteen Western European countries, and in eight South-East Asian countries audiences are now monitored electronically via a peoplemeter. Very soon Singapore will be added to this list to total 29 countries.

Despite this convergence of basic technique, viewing is defined in a variety of different ways. Taking the example of a thirty second commercial appearing just after a fifty second commercial in a three minute long break (see diagram), there are eight definitions in Europe alone of how the spot rating will be calculated.

	Min 1	Min 2	Min 3	
Programme A				Programme B
	commercial break			

| Rating: | 2 | 2 | 4 | 6 | 6 |
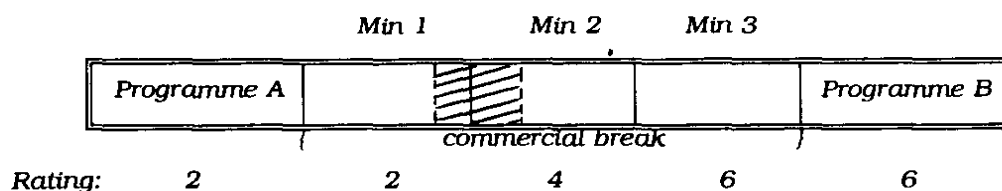
In Spain and France (Model 1) the exact second-by-second average audience to the spot is calculated. Other definitions are as follows:

TABLE ONE

Model	Country(ies)	Method of Calculation	Example Rating
1	France, Spain	Rating of time occupied by spot	3
2	Finland, Turkey, UK	Rating of clock minute in which spot starts	2
3	Denmark, Netherlands	Rating of clock minute in which majority of spot appears	4
4	Italy, Portugal	Weighted average of clock minute(s) in which spot appears	3.3
5	Ireland	Average rating of the five minutes since start of commercial break	4.8
6	Switzerland	Net reach of the fifteen minute period centring on spot (ie 7.5 minutes either side)	7*
7	Austria, Germany, Greece, Belgium (S)	Average rating of the whole break in which commercial appears	4
8	Belgium (N)	Four-week average of equivalent break	5*

*Estimate
Source: National Peoplemeter Systems in Europe,
Interim Report, June 1992 (EAAA)

Although in practice there may be many instances where this simply doesn't matter, there are also many conceivable instances where it does. In the example quoted of a three minute commercial break, straddling a two-rating and a six-rating programme, the thirty second spot highlighted may be reported as having achieved anything from a rating of 2 to one of 7 or more.

All this excludes the additional problems of the components of ratings - are guests included? Is video recording accounted for? What about homes on holiday?

So, despite harmonising the basic measurement vehicle for television, historical, cultural and political circumstances have conspired to keep the measurement techniques very different from one another in Europe.

South-East Asia is, of course, fortunate in having a company like the Survey Research Group responsible for measuring television in six of the key markets where both the measurement vehicle and the operational definition of a rating point are the same in all countries.

With the press, like television with its diaries and its peoplemeters, there are also fundamentally different techniques of measurement, although in this case no general agreement on which technique is the best one.

The differences between the Thru-The-Book, First-Read-Yesterday and Recent Reading techniques have been discussed many times before at these conferences; we even have a new technique being introduced in Malaysia (not by Survey Research Group) this year which seeks to measure when issues are "obtained" rather than when they are read.

But, broadly speaking, all the South-East Asian countries use the RR technique. An added advantage from the point of view of harmonisation is that most of these surveys are conducted by the Survey Research Group.

There are, within the broad confines of the Recent Reading technique, at least a dozen methodological issues where the choice of method is likely to affect the average issue readership levels. Some are clearly more significant than others. There is not always a consensus on what "best practice" is for these methods.

Under the heading of "respondent stimulus" the most significant issue is likely to be whether or not the titles being asked about are grouped or presented individually. Less significant will be such areas as the explanation of what a reading event is and whether mastheads or typed cards are used.

Publication order will be more important: whether titles are fully rotated or asked about in a pre-set order can affect individual title results greatly. There is wide consensus on "best practice" here.

Screening is another area. The UK NRS, for example, allows any publication read in the last year through the first filter, whereas all the South-East Asian surveys relate the filter period to publication frequency. The effect of asking a frequency or a recency question first has also been debated. Arguably, if respondents are first asked whether or not they have read a publication within a particular interval, and only those who have go through to be asked how often they have read it, a small proportion of readers will not be able to contribute to cumulative readership. AIR levels are, however, unlikely to be affected.

The French CESP has changed the order of recency and frequency questions twice over the last twenty years with no noticeable effect on results. The UK, which changed the order in July 1992, made the change in conjunction with a number of other technical changes, notably in the filter question for dailies; the effects are unproven.

A fourth heading under which methodological differences are likely to affect AIR levels is that of the format of the recency question itself. The question may be direct ("disclosed"): "did you read title x yesterday?" Or it may be indirect ("hidden"): "when did you last read title x ?"

The whole area of respondent load and fatigue is clearly important, especially for questions being asked near the end of a survey. The number of titles asked about, the number of qualitative questions asked about reading and whether or not -and how - questions are asked about product and brand usage; all these will affect the length of the interview and the stamina of the respondent.

Technical issues apart, we need to ask other questions which will clearly affect AIR levels. Is fieldwork continuous or not? Is coverage national or skewed towards urban areas? How do age definitions of the universe vary? Do call-back procedures ensure reasonable response amongst difficult-to-recruit sectors of the population?

Table three (appended) looks at how most of the South-East Asian readership surveys (at least those for which I can get information) resolve some of the more important methodological questions - naturally not every single issue can be covered as there are simply too many areas ranging from sampling and fieldwork practice to questionnaire design that probably make some difference to the results. I have simply looked at some of the more important areas.

In the sense of conducting every readership survey in exactly the same way in every country, South-East Asia has not yet harmonised its readership surveys between countries. However, it is certainly a great deal further down the road towards this goal than Europe. Another useful way of assessing progress to date in the region is to examine the extent to which readership research fulfils the criteria for harmonisation set out in the EAAA Policy Paper: "One Europe-One Media Currency" back in May 1991.

There are ten main criteria dealing with the research techniques themselves, although the EAAA also put forward opinions on how research should be organised, which are not strictly relevant to harmonisation itself.

1.   The universe definition should be as wide as possible, taking private households as the base. This is possible and is currently implemented in all South-East Asian countries except Indonesia which, with some 13,677 islands, is a market which it is only realistic to measure within the key cities. The Philippines has had no readership survey since 1989; this also consists of many islands.

2.   All surveys should record the exact age of respondents. Taiwan and the Philippines did this in their latest surveys; Hong Kong, China, Singapore, Malaysia, Thailand and South Korea did not. This is now being looked into by SRG for all these countries.

3.   Although making no recommendation between the various techniques of readership measurement, the EAAA calls for standardisation once a method is decided upon. All Asian countries except for the new FSA survey in Malaysia, use the Recent Reading technique.

4.   Full access to readership data by users is called for, excepting data known to be unreliable when, for example, based on short periods. This is the case with all SRG surveys, which can be accessed via the Printscope software.

5.   Continuous fieldwork is recommended, and occurs in Taiwan, Hong Kong, Singapore, Malaysia, Thailand (beginning this year) and South Korea. In China it is carried out only in April.

6.   Although the EAAA demanded only a six week delay between fieldwork and reporting, this is not always adhered to in Asia. Taiwan reports quarterly alongside Malaysia. In Hong Kong it is possible to get monthly figures as well as a six-monthly report. Singapore, Korea, Thailand and China report annually.

7.   The EAAA recommends less variation in the wording of recency and frequency questions. This is currently a minor issue in Asia, although there is still no complete agreement on either the order of recency and frequency questions or the form of the recency question.

8.   Noting that a debate exists between telephone and personal interviews, the EAAA asks which is preferable. All Asian markets use personal interviews as the only practicable technique, although we note that the Dutch, the Danes, the Norwegians and the Swiss have all moved to telephone interviews.

9.   In supporting the call for "more precise and more qualified measures of readership" the EAAA encourage more diagnostic measures of "the circumstances in which readership occurs." Quality of reading measures are common throughout the Asia region covering areas such as time spent reading and source of copy.

10.   The EAAA urges care to be taken in not overburdening the respondent with too lengthy an interview covering too many things. Interview times are approximately as follows in South-East Asia:

TABLE TWO

China	-	30 minutes
HongKong	-	30 minutes (+10 minutes self-completion) questionnaire
Indonesia	-	55 minutes
S. Korea	-	75 minutes
Malaysia	-	45 minutes
Singapore	-	45 minutes
Taiwan	-	40 minutes
Thailand	-	45 minutes
Philippines	-	75 minutes

Source: SRG

Finally, as mentioned at the beginning of this paper, there are clues we can look to in the results of readership surveys when trying to judge the extent to which readership measures are broadly comparable.

James Rothman did some work in this area for Carat in comparing readership surveys in six European countries - the UK, France, Germany, Denmark, Italy and the Netherlands.

In this he attempted to establish comparative statistics which gave some idea of the relative value of a claimed reader in different countries. One measure he used was the average reader-per-copy levels of different categories of publication - in other words was the number of pass-on readers being claimed for a daily newspaper or a weekly magazine markedly different or broadly the same in different European countries? This would suggest whether readership habits differed much or not, and would probably not be as sensitive to the measurement technique as figures would be for individual titles.

However this type of analysis is difficult in the South-east Asian context due to the lack of audited circulation figures in some markets.

A second type of analysis possible is to ascertain the number of average issue reading "events" by publication category; for example, comparing the number of titles looked at by the average person in a year. The underlying assumption is that this sort of figure would be similar in countries where the state of economic and social development is similar and where cultural values are not dramatically different.

The figure can be obtained by multiplying the average issue readership of all titles by the number of issues published in a year and dividing this by the total population. This will tend to vary, as the table shows, by the incidence of reading within the population.

For example, Singapore has both the highest newspaper readership of the Asian "Tiger" countries and the highest number of different newspapers read or looked at in a year. Both Malaysia and South Korea have low penetration of daily newspapers and a small number of different titles read. Literacy levels are in the order of 90% in Hong Kong, Singapore and Malaysia.

TABLE FOUR
Number of Copies Read per Person (1991/92)
(Adults - all language groups)
Daily Newspaper

	% Reading yesterday	Number of Copies/year	Read-to-Screen Ratio
Hong Kong	77%	340	75%
Singapore	84%	425	74%
South Korea	51%	259	59%
Taiwan	77%	331	65%
Malaysia	56%	243	68%

SOURCE: SRG

A similar relationship was found for magazines, although not quite such a clear one due to the widely different coverage of titles on different surveys.

This does seem to show that, despite some differences in the readership measurement techniques, the surveys are broadly reflecting the "truth" for categories of publication, and that this is consistent between the different countries. This is, of course, more difficult to establish in Europe, where fundamental differences in technique do exist, but there is an argument that suggests such measures are more independent of technique than looking at individual title AIR.

A third comparative statistic identified by James Rothman was the read-to-screen ratio, again for broad categories of publication. This again tries to home in on the fundamentals of a population's reading habits. It compares the **regularity** of reading by looking at which of the people claiming to read, for example, a daily newspaper during the last seven days also read one yesterday.

Broadly speaking, two thirds to three quarters of readers "in the past seven days" read a title "yesterday". Again it is South Korea, with the lowest overall readership, that records the lowest read-to-screen ratio.

Such comparative statistics have their limitations. To what extent, it can be argued, will the differences between countries be due to technique or "real" behaviour? South Korea is a very different country from Singapore; Malaysia is very different from Taiwan.

The only conclusion that can be drawn from all this is, as was noted at the beginning of this paper, that we will never achieve exact comparability of results between countries. But both the broad comparability of measurement techniques in South east Asia and the broad comparability of results suggest that the region is a lot further down the road to "harmonisation" than Europe.

TABLE THREE

Country	Survey	Latest Survey	Sample Size	Number Of Titles	Survey Technique	Reader-ship Measure	Respondent Stimulus	Rotated	Filter*	Order Of Recency & Frequency Questions	Form Of Recency Question	Whether "Qualitative" Question asked ++			Length Of Total Question-naire	Fieldwork Dates	Geographical Coverage	Age Of Respondents
												Time Spent Reading	Source Of Copy	Place Read				
AUSTRALIA	Roy Morgan Rdap Survey		29,000	100	Personal interview	TTB	Printed list	Yes	Yes #	No frequency	Disclosed	No	No	No	30 mins		National	14+
CHINA	Media Index	1992	1,500	58	Personal interview	Recent reading	Mastheads	Yes	No	Recency first	Hidden	Yes	Yes	Yes	30 mins	April	Guangzhou, Shanghai, Beijing	15+
HONG KONG	Media Index	1992	8,642	53	Personal interview	Recent reading	Mastheads	Yes	No	Recency first	Hidden	Yes	Yes	No	40 mins	Continuous (Aug '91 – Jul '92)	National	9+
INDIA	NRS		75,000	50	Personal interview	Recent reading	Mastheads	Yes	Yes	Frequency first	Hidden	No	No	No	45 mins		Major cities	15+
INDONESIA	Media Index	1992	8,100	95###	Personal interview	Recent reading	Mastheads	Yes	Yes #	Frequency first	Hidden	No	No	No	55 mins		Major urban centres	15+
JAPAN	ACR	1992	12,000	287	Self completion questionnaire	Recent reading	Reproduction of front covers/contents	No	No	Recency first (M) Frequency first (M)	Disclosed	No	No	No				12 – 69
MALAYSIA	Media Index	1992	5,000	84	Personal interview	Recent reading	Mastheads	Yes	Yes	Recency first	Hidden	Yes	Yes	Yes	45 mins	Continuous (Jul '91 – Jun '92)	National	15+
NEW ZEALAND	AGB	1992	11,088	90	Personal interview	Recent reading	Mastheads	No	No	Frequency first	Disclosed	No	No	No	40 mins			10+
PHILIPPINES	Media Profile	1988	2,000	100	Personal interview	Recent reading	Mastheads	Yes	Yes	Recency first	Disclosed	No	No	No	75 mins	Jun–Aug	Metro Manila	12+
SINGAPORE	Media Index	1992	4,200	65	Personal interview	Recent reading	Mastheads	Yes	Yes	Recency first	Hidden	Yes	Yes	Yes	45 mins	Continuous (Jul '91 – Jun '92)	National	15+
SOUTH KOREA	Media Index	1992	5,000	130	Personal interview	"Yesterday" reading	Mastheads	No	Yes	Frequency first	Disclosed	Yes	Yes	Yes	75 mins	Continuous (Jul '91 – Jun '92)	National	11 – 69
TAIWAN	Media Index	1992	7,000	110	Personal interview	Recent reading	Mastheads	Yes	Yes	Recency first	Hidden	Yes	Yes	Yes	40 mins	Continuous	National	15 – 55
THAILAND	Media Index	1992	5,000	130	Personal interview	Recent reading	Mastheads	Yes	Yes ##	Frequency first	Hidden	No	No	No	45 mins	Continuous (From Jan '93)	National	12+

* Unless otherwise stated
   Dailies – read in the last 7 days
   Weeklies – read in the last month
   Fortnightlies – read in the last 3 months
   Monthlies – read in the last 6 months

++ of dailies only unless stated

\# combined with frequency question
\#\# "at present" do you read or look at ...
\#\#\# varies by city. Jakarta figures cited