# WHAT'S BEEN HAPPENING AND WHAT'S NEW – TWENTY YEARS OF LOOKING AT READERSHIP RESEARCH

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## Synopsis

This paper is based on the 2001 and earlier editions of the "Summary of Current Readership Research", which has been prepared for each Symposium since the first one in New Orleans in 1981. The paper describes the methodological trends as observed, provides a brief historical overview, illustrates differences in historical developments with examples from six selected countries, and ends by giving news about recent developments around the world since the last Symposium in 1999.

## Introduction

Once again I have great pleasure in presenting an updated version of the "Summary of Current Readership Research". This new edition is the tenth in the series, which began with the first International Readership Research Symposium, which took place in New Orleans in 1981. It has been updated for each subsequent Symposium. I thank all contributors who helped me with the task by providing the necessary information.

The main section of the new "Summary" contains the methodological details of 64 total audience readership surveys in 52 countries. In most countries, they are their national readership surveys or their equivalents. For some countries, two surveys are included. (In the past, there were occasionally three surveys included for a single country.) This may be for one of two reasons: one is that both surveys are understood to be widely used as alternatives within the industry, the other is that they cover different media, either newspapers or magazines.

Compared with the last "Summary", prepared for Firenze 1999, five new surveys are included. They are the Roy Morgan Readership Survey of New Zealand, and the Target Group Indices of Ecuador, Israel, Panama and Romania.

Two surveys are deleted: the AC Nielsen China Millenium Report and the National Consumer Survey of the USA. One survey, the Audipress survey of Italy, remains included but shows no current details. A separate, less detailed, section contains information about many other readership surveys, which cover specialist markets, and which our correspondents thought worth noting.

In 1981, the "Summary" contained 24 surveys from 18 different countries. So, if we look at the record and notice that we now report 64 surveys from 52 countries, we may call this progress. Many countries in the world are now participating, which did not have a national readership survey or the equivalent twenty years ago. This can only be good for the print medium.

If we look for methodological progress, the picture is less clear. In 1981, we became aware that there were many differences in the methodological details we recorded. Over the following years, we have documented many methodological changes. Many of these were made, I am sure, as a result of the insights and new knowledge, which we have gained and shared at these Symposia.

We have undoubtedly learned a lot. On the whole, the changes made were for the better, but not all changes proved to be successful. We recorded many reversals and discontinuations of new practices, which, at the time of their introduction, were clearly thought to be improvements. Looking at current practices, there seems no less variety in methods today than there was twenty years ago.

In the following, I should like to describe the current variety in methods by looking at some key factors, which can influence readership results. Then I will give a brief historical overview, followed by descriptions of different developments in six selected countries. They are France, Germany, Italy, the Netherlands, Great Britain and the USA. I will conclude with a review of "What's new" around the world.

## Factors Influencing Readership Results

We are aware that there are numerous factors, which can influence readership results. Often a change in one respect, an intended improvement, can have unforeseen, and possibly negative effects in another respect.

Key factors include sampling method, method of interview, model used to estimate average-issue-readership, length of the media list, length of interview, order of presentation of publications to informants, the stimulus employed, and the details of the readership questions – that is filter, recency and frequency questions – and their sequence.

In the following, I shall look at a selection of these.

## Model Used to Estimate Average-Issue-Readership

As we have observed before, the Recent Reading model is now almost universal.  57 out of 64 surveys use this model, as may be seen from the table below:

Number of Surveys by Readership Model Used

| | |
|---|---|
| Recent Reading | 57 |
| FRIPI | 1 |
| FRY | None |
| TTB | None |
| Specific Issue | 2 |
| Frequency | 2 |
| Mixed models | 2 |

FRIPI stands for First Reading In Publication Interval. The only practitioner of the model is the AMPS survey in South Africa. (However, I have been told that this method is also in use in certain other African countries which follow the AMPS methodology. We hope to be able to include the details of these surveys next time round.)

FRY - First Read Yesterday - has by now been discontinued in all European countries such as the Netherlands, Denmark, Norway and Finland, where it had been practised for some years before.

Likewise, TTB - the Through-the-Book method – has now been discontinued by Canada's PMB survey, following its abandonment in the USA by Simmons in 1995.

Specific Issue measurements are taken in Japan by ACR and in the Ukraine by the National Readership Survey.

Frequency is used to estimate AIR (Average-Issue-Readership) in Poland by PBC General and in Sweden by ORVESTO Consumer.

Finally, different models within the same survey are in use by the Roy Morgan Readership Surveys in Australia and New Zealand.  The Australian survey uses FRIPI for weekly magazines, Specific Issue recognition for monthly magazines, TTB for weekly business titles, and Recent Reading for daily and weekly newspapers.  In New Zealand Recent Reading is used for dailies and FRIPI for all other publications.

## Method of Interview

50 out of 64 surveys conduct the interview, or, more specifically, the part of the interview that contains the readership questions, using the personal, face to face, interview method.

Four of these surveys use CAPI – Computer Assisted Personal Interview -, namely Belgium's CIM survey, the UK's NRS and, a new development, South Africa's AMPS.  As reported last time, France's magazine survey AEMP uses Double-Screen CAPI. (DS-CAPI will also be the method of the British NRS from 2002.)

These and other methods in use are shown in this table:

Number of Surveys by Method of Interview

| | |
|---|---|
| Personal - pen and paper | 46 |
| Personal – CAPI | 3 |
| Personal – DS-CAPI | 1 |
| Telephone | 8 |
| Self-completion | 4 |
| Mixed – tel. and self-comp. | 1 |
| Mixed – tel. and personal | 1 |

The number of telephone surveys has not increased since 1999. (There were no telephone surveys recorded in 1981.)  The eight surveys today using CATI – Computer Assisted Telephone Interviewing – are Canada's newspaper survey NADbank, Denmark's Index Danmark/Gallup, Finland's KMT, France's newspaper survey IPSOS , Netherland's SummoScanner, New Zealand's Roy Morgan, Portugal's Bareme Imprensa and Switzerland's MACH survey.

Norway's Forbruker & Media uses the telephone for newspapers and self-completion for magazines.

Russia's National Readership Survey uses the telephone method in Moscow and a personal interview elsewhere.

**Length of Media List and Length of Interview**

The number of publications our surveys try to measure is still increasing.  Based on the 48 surveys, which are listed in both the 1999 and 2001 editions of the "Summary", the average number of titles per survey was 195 in 1999 and 222 in 2001.  (In 1981 the average number of titles for 24 surveys was 93.)  However, the time spent on the readership part of the interview has not increased between 1999 and 2001, for both years the estimate has been reported to be 21 minutes, and the total length of interview has only  increased slightly from an average of 50 to 51 minutes.

The overall conclusion is clear: we tend to spend less time per publication in our readership interviews.

**Sequence of Readership Questions**

For the purpose of the next few chapters, I consider the three readership questions which are at the core of our readership interviews.  They are the filter question, often referred to as the "screen", the frequency and the recency questions.  First, I consider their sequence.

Most surveys start with a time related filter question.  This question comes first.  We must note, however, that some surveys start with another question, which we have called a "hurdle" question, before they proceed with a time related filter question.  An example of the "hurdle" procedure is the German MA – Media Analyse –, which begins with asking the respondent for each publication whether this publication is totally unknown to him or her, whether it is known but only by name, and whether he or she had it in his or her hand before the interview.

In the table below, which shows the variations in the sequence in which different surveys proceed in asking the readership questions, the filter question is denoted by an S (for screen, to avoid confusion with frequency), the frequency question by F and the recency question by R.

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Number of Surveys by Sequence of Readership Questions

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| | |
|---|---|
| S,F.R | 33 |
| S,R,F | 15 |
| F,R | 10 |
| R,F | 2 |
| S,R | 2 |
| S,F | none |
| R only | 1 |
| F only | 1 |

We can see 50 surveys in total employ a filter, or screening, question.  Of these, 33 surveys proceed with the frequency question followed by recency, and 15 surveys with recency followed by frequency.

Ten surveys start with the frequency question followed by recency.  In these cases, the frequency question tends to act as a filter.

Two surveys, the Canadian NADbank and the Hong Kong Media Index, employ recency followed by frequency.

The Australian Roy Morgan and the Portuguese Bareme Imprensa surveys use screen and recency, and no frequency.  Japan's ACR employs recency alone and Sweden's Orvesto Consumer frequency alone.

**Type of Filter Question**

There are many variations in the time periods used for the time related filter question.  We make a distinction between those surveys, which use a filter which is common for all publications and those which use a filter with, for the informant, changing reference periods according to publication frequency group.  This can be seen from the following table.

Number of Surveys by Type of Filter Question

Common filter for all publications

| | |
|---|---|
| Ever read | 3 |
| Past 12 months | 11 |
| Past 6 months | 15 |
| Past 3 months | 1 |
| Past month | 1 |

Filter varies by publication frequency group

| | |
|---|---|
| 12-issue-period | 1 |
| Variable issue periods | 18 |

| | |
|---|---|
| No filter question | 16 |

The majority of surveys with filter questions employ a common filter for all publications – but there is variation concerning the time period used, as shown in the table. A relatively large number of 19 surveys employ filters whose time references vary from publication group to publication group.

## Type of Frequency Question

There is even greater variety in the type of frequency question than is the case with the filter question. Again we make a distinction whether the form of question is common for all publications, or whether it varies by publication group. Another distinction is whether a numeric or a verbal frequency scale is used. This is summarised in the table below.

Number of Surveys by Type of Frequency Question

Frequency scale common for all publications

| | |
|---|---|
| Numeric, no. out of 12 | 2 |
| Numeric, no. out of 6 | 5 |
| Numeric, no. out of 4 | 10 |
| Verbal, no numeric explanations | 3 |
| Verbal, with numeric explanations | 15 |

Frequency scale varies by publication group

| | |
|---|---|
| Numeric | 25 |
| Verbal | none |

| | |
|---|---|
| No frequency | 4 |

A numeric scale is used by most surveys. Of the 18 surveys which employ a verbal scale, 15 provide the respondent with numeric explanations, and three do not.

In total, 35 surveys use a common frequency scale for all publications, while 25 employ a variable scale according to publication group.

It is interesting to note that, amongst the 35 surveys which use a common frequency scale for all publications, there is still a great variety in the number of scale positions from which the respondent may choose, as may be seen from this table:

Number of Surveys by Number of Frequency Scale Positions

Number of scale positions (35 surveys
with common frequency scale for all publications)

| | |
|---|---|
| 3 positions | 2 |
| 4 positions | 15 |
| 5 positions | 7 |
| 6 positions | 7 |
| 7 positions | 2 |
| 12 positions | 2 |

**Type of Recency Question**

The recency, or "when last", question may be asked in different forms. In broad terms, we distinguish between those questions for which the answer pre-codes are "hidden" from the respondent, and those for which they are disclosed.

An example of the hidden version is: "When was the last time that you read or looked at (publication)?" Here the interviewer classifies the answers without the respondent knowing the categories.

An example of the disclosed version is: "Did you read or look at (publication) yesterday/in the last 7 days/in the last month?" Here the respondent knows the answer categories we are interested in.

Our surveys are fairly equally divided between these two types, as follows:

<u>Number of Surveys by Type of Recency Question</u>

| | |
|---|---|
| Hidden categories | 24 |
| Disclosed categories | 31 |
| Mixed versions | 6 |
| Specific issue question | 2 |
| No recency | 1 |

For the six surveys with mixed versions, it is typical that the recency question relating to daily newspapers takes the disclosed form, e.g. "Did you read (publication) yesterday?" while the question relating to magazines takes the hidden form, e.g. "when last" with answer categories hidden.

**Order of Presenting Publications**

An important factor is the order in which publications are presented to respondents in the interview. There are many possible variations. Most surveys use rotations, in one form or other, but there are many different ways to achieve these, with likely different effects. Many surveys use the shuffle cards method in order to randomise the order of presentation, but again there are various procedures. Amongst those surveys, which employ fixed orders, again we have different options. I have tried to summarise these in the following table.

<u>Number of Surveys by Type of Publication Order</u>

| | |
|---|---|
| Publication groups rotated/ titles within groups rotated | 29 |
| Publication groups rotated/ titles within groups fixed | 2 |
| Publication groups fixed/titles within groups rotated | 24 |
|   Of which group order: | |
|     Monthlies, weeklies, dailies | 8 |
|     Dailies, weeklies, monthlies | 15 |
|     Other | 1 |
| Both publication groups and titles within groups fixed | 8 |
|   Of which group order: | |
|     Monthlies, weeklies, dailies | none |
|     Dailies, weeklies, monthlies | 2 |
|     Other/na | 6 |
| Newspapers rotated/magazines fixed | 1 |

While a clear majority of 53 surveys rotate individual titles, there is no agreement about the order in which groups of publications, as defined by their publication frequency, are presented to the informant. 31 surveys rotate them, 32 keep them fixed.

Those that keep a fixed order of publication groups do not agree on the actual order either: eight surveys start with monthlies and end with dailies, 15 do it the other way round.

The single figure at the bottom of the above table refers to the Norwegian Forbruker & Media survey, which as previously mentioned, uses different presentation methods for newspapers and magazines: as mentioned before, newspapers are measured via the telephone method, and magazines via self-completion.

**What's New**

The following is a review of recent developments in various countries around the world, as reported to me by our correspondents.

From Austria the news is the launch of a new regional print survey in addition to the national readership survey, the MA.

The developments in Belgium, concerning the CIM survey, involve changes in the universe definition, sample size, cluster size and fieldwork organisation. Instead of the population aged 15 and over, the survey now defines its universe as the population aged 12 and over. The annual sample has been increased from 10,000 to 10,500. In bi-lingual areas the number of interviews per point has been reduced from four to two, and bi-lingual interviewers are now employed in all bi-lingual areas, not only in Brussels as before.

In Brazil, the Estudos Marplan now covers 13 markets (up from nine), it includes more newspapers, partly as a result of new launches, and it now includes 379 brands in its marketing data section covering 13 categories of products and services.

The Canadian PMB –Print Measurement Bureau – survey changed from Through-the Book to Recent Reading in January 2000.

In China, the AC Nielsen Millenium Report has been discontinued. The two current readership surveys available in China are the CNRS – China National Readership Survey – and the CMMS – China Marketing and Media Study.

The Index Danmark/Gallup from Denmark notes a new reporting system for newspapers. Monthly data are now provided, and depending on size of circulation, these are based on the latest month or longer sampling periods.

In Finland the KMT – Kansallinen Mediatutkimus - is described by our correspondent as a brand new national readership survey, in existence since August 2000. It combines regional and national press in one fieldwork operation. There are separate reports: the national report is called "NRS Reading Facts" and is published two times per year. The "Regional Media Survey" comes out once a year. The sample has been increased from 9,000 to 26,000. Finally, the new survey uses Recent Reading, replacing FRY.

In Germany AG.MA Online has been launched, not a survey, but an initiative to provide objective evaluation standards for internet research. In future, AG.MA may conduct its own internet study. AG.MA also participated in a European working group, which is concerned with harmonisation of internet data. As part of its development programme, AG.MA reports that further testing of the pentop method of interviewing, including the testing of new software, is underway.

Our correspondent from Hungary reports an increased sample of the Media Analysis study and the inclusion of an internet question.

A recent development in India concerns the IRS – Indian Readership Survey -, which is supported by the Media Research Users' Council. It is reported that ORG-Marg, the research agency conducting the study, has resigned from its contract. This leaves the NRS, supported by the National Readership Studies Council, as the single large-scale readership survey in India, with a sample size of 212,000 respondents. The NRS reports that they have tested the readership of supplements, and that they have included a qualitative measure about which paper the respondent considers as his main paper.

The JNRR - Joint National Readership Research – of Ireland reports two developments. One is the recent increase in sample size from 5,000 to 7,000 respondents annually. The other is the split of the questionnaire for marketing data. Readership and classification data remain common for all samples.

As mentioned above, disturbing news reaches us from Italy. The results of a new method for the Audipress survey, outlined at the last Symposium, have not been published. New specifications have been drawn up for a new study to start this autumn.

In the Netherlands, the SummoScanner ended fieldwork in July 2001. There will be one further report, to be published in October. At the time of writing, no new design has been agreed. In future, there may be two separate measurements for newspapers and magazines.

The ACNielsen National Readership Survey of New Zealand reports various recent investigations, concerning the possibilities of a business executives readership survey, of more frequent reporting, and of rim-weighting to take better account of ethnic origin and occupation. They also changed their socio-economic scale and, perhaps more significant, they introduced respondent incentives to increase response rates.

Developments in Norway concern the Forbruker & Media survey. In September 2001, they changed from FRY to Recent Reading, or, in their term, to Pure Recent Reading. This method will be presented here at the Symposium. As mentioned before, magazines are measured by self-completion, but now with logos in colour. There is now only one products and brands questionnaire instead of two, and, finally, attention is drawn to browser measurement for electronic newspapers and magazines.

In Russia the National Readership Survey is split into NRS-Moscow, conducted by telephone, and NRS-Russia, conducted face to face. The NRS-Moscow increased its sample from 15,500 to 28,000 interviews in 2001, with continuous fieldwork since

2000 and rolling databases for reports. NRS-Russia is now a separately conducted specialised press survey, not a single source media and consumer survey as before. Its sample size has increased from 10,000 to 56,000 in 2001. Rotation of publications has been introduced. Both surveys now include source of copy questions.

News from South Africa is as follows: since January 2001 AMPS – All Media and Product Study – employs CAPI interviewing. First results are expected by the time of this Symposium. Experiments concerning two alternative measurement methods of free sheets have been conducted this year. Both experimental methods involved the listing of an area's free sheets on a single page, not, as was the case till now on AMPS, as single-title mastheads. The difference occurs at the positioning of questions about the free sheets in the interview. Finally, we should note that there are now seven other African countries, which follow the AMPS methodology, including FRIPI. They are Ghana, Kenya, Tanzania, Uganda, Namibia, Nigeria and Zimbabwe. Botswana will follow soon.

In Spain there are changes to the reporting system of EGM – Estudio General de Medios. To improve the reliability of data, since early 2001, only moving annual estimates will be provided, not short term in addition to long term data as before.

Our correspondent from Switzerland reports three developments. One is the change from frequency based estimates of the MACH survey to the recency model in 2000. Then there is the annual publication of an inter-media study, MA Strategy, with print, TV, radio, cinema and internet data. Finally, he draws our attention to a revised consumption survey, MACH Consumer 2001, which integrates a new typology system.

In the UK a new contract has been awarded for the NRS, to Ipsos-RSL, for four years starting in January 2002. This year various development projects have been conducted or are underway to test the proposed methodology of the new contract. They include: Double-Screen CAPI; self-completion to increase response rates in London (i.e. mixed methodology); measuring specialist magazines like the computer press via self-completion at the end of the CAPI interview; measurement of further newspaper sections, including in-paper sections; and PML - Personalised Media Lists. There will be presentations about DS-CAPI and PML at the Symposium.

Additional news from the UK is the planned launch of a Roy Morgan Readership Survey in 2002, conducted by telephone over a period of 50 weeks and employing a sample of 50,000 respondents. AIR estimates will be obtained via first time reading methods, except for dailies. This follows a Wave 1 study amongst 4,000 respondents in 2000.

In the USA, MRI completed its Accumulation Study. The results were released last October and have been updated for subsequent studies. The study involved over 10,000 respondents, surveyed across 16 weeks. Details of the findings will be presented at this Symposium.

As reported for the UK, a Roy Morgan Readership Survey is also planned to start in 2002 in the USA, using the same sample size and design as for the UK. This follows their American Wave 1 study of 2000 involving 5,544 respondents.

## The Meier Historical Overview

So much for recent reported developments. Taking the opportunity of the Symposia 20th birthday, I will now describe what I observed over the last twenty years in relation to different developments in six countries. This is a strictly personal review.

 I should like to set a context by giving a brief overview. The 1981 Symposium in New Orleans was dominated by a debate about the two models then in use: Through-the-Book and Recent Reading. Through-the-Book was the traditional method of magazine research in the USA, conducted by the Simmons organisation. Recent Reading had been introduced into the American market only a few years earlier by the British researcher Timothy Joyce through the company MRI. Recent Reading was the dominant method outside the USA.

The discussions at New Orleans and subsequent Symposia revealed flaws with both models.

Through-the-Book's problems were that the number of titles the method could bear was rather limited, as well as worries about its inability to capture occasional readership adequately. Hence the generally fewer numbers of readers this method generated compared with Recent Reading.

Recent Reading's main flaws were exposed to be its model bias, namely replicated and parallel reading. The underlying assumption of the method's practitioners was, that the contrary effects of these two phenomena more or less cancelled each other out. However, this was proven not to be the case. Replicated reading, which leads to over-claiming in the model, was clearly the stronger of the two. Furthermore, the effect was not equal between publications. Hence the relatively high readers-per-copy figures compared with Through-the-Book, and the large readers-per-copy variations.

In those early days of the Symposia, a central theme was validation. If we could validate our methods, so the thought went, we could all agree on the method, which came closest to the ideal. In the USA, this lead to a series of experiments in search of the "Gold Standard". While they showed, that over- and under-claiming can be reduced significantly, the methods to do so are not practical ones for large-scale implementation in national readership surveys.

Validation has disappeared from our agenda. Today, the consensus is, that, in order to produce an acceptable readership currency in a given country, it is necessary to show that the method employed does not lead to deliberate and avoidable bias in favour of one publication, or one group of publications, over another. It is tacitly agreed that no method can nor needs to produce the truth, whatever it is. But it needs to be fair.

Consequently, the efforts of researchers today tend to be geared towards improvement of the methods in place. We have learned that the smallest intervention can change the results. Those interventions can become manipulations, designed to correct for detected theoretical, and sometimes obvious, and sometimes assumed, imbalances in the results for different publications.

There seem to be three types of reaction to this accumulated knowledge amongst the guardians of our national readership surveys. One is fear of change. The fear is that the theoretical improvement will in practice lead to un-acceptably large changes, which either market or afflicted parties may not bear.

A second reaction is a policy of gradual improvement in some small detail here and there. Interventions of this kind are not presented as major change. They are corrections to relatively small imperfections of the survey design, and will improve the survey overall without, hopefully, altering the results in a major way.

The third reaction is to make major and small changes only once in a while, and then all at the same time. With this approach, it is acknowledged that the methodological changes could lead to major changes in the results. The survey will be seen as a better survey. The market will be well prepared for the change, and no comparisons with the previous results will be made.

Let me now describe what I observed over the last twenty years taking surveys in six countries as examples.

**France**

In 1981, the Summary of Current Readership Research showed that the French industry survey, organised by CESP, the Centre d'Etude des Supports de Publicité, employed an annual sample of 12,000 respondents, sampled by random methods in rural and by quota in urban areas. The method was a personal interview. 108 publications were covered, they included both newspapers and magazines.

Coloured masthead cards were used. There was a 12-months filter, a five-point numeric frequency question and a recency question, whose positions were disclosed to the informant. The question sequence was filter, then recency, then frequency.

In 1988, a major change was recorded: a move to grouped titles cards. It was the same year in which South Africa was reported to have made the same move. Both countries had taken their cue from the NRS, the National Readership Survey of Great Britain, which went over to the grouped titles method in 1984.

Unlike Britain, however, mastheads were shown on the grouped titles cards in both France and South Africa, instead of typescript titles. In France, daily newspapers continued to be shown on single titles cards.

The French sequence of readership questions was also changed. It became filter, then frequency, then recency.

This method continued until 1994, when newspapers and magazines split apart and CESP lost control of the survey. I understand that dissatisfaction amongst magazine publishers with the results of the grouped mastheads method was, at least partly, to blame.

Since then, there are two national readership surveys in France, one measuring magazines, the other newspapers. The magazine survey is called L'Audience de la Press Magazine AEPM, the newspaper survey has the name Ipsos-Audience de la Press Quotidienne et la Presse Hebdomadaire Regionale.

Today the magazine survey employs a sample of 20,100 respondents and is conducted with advanced technology – double-screen CAPI. Coloured single title mastheads of 154 publications are shown on the informant's screen. There is a 12-months filter, a six-point numeric frequency and a disclosed recency question. The total AEPM sample is drawn by quota.

The French newspaper survey is a telephone survey, with 22,800 respondents per annum, drawn with random digit dialling and set quota controls. It measures 344 titles. Prompting is verbal. There is a 12-months filter, a numeric frequency question and a disclosed recency question.

The French example shows that an intended improvement, in this case the move to a grouped titles method, went wrong, for whatever reasons - I suspect the reasons to be partly technical and partly political. Eventually, this resulted in the split into two independent surveys. Both surveys are undeniably conducted to high design and execution standards. But I dare say that such a split may have disadvantages in the market place.

**Germany**

In Germany, the official industry survey is the MA, Media-Analyse, organised by AG.MA, the Arbeitsgemeinschaft Media-Analyse. There is a second survey available to media planners, also listed in the Summary, that is the AWA, Allensbacher Werbeträgeranalyse. In the following, I will deal with the MA only.

For me, the German MA survey stands as an example for little change over the years. This is in spite of numerous experiments and discussions. The 1981 Summary reports an annual sample of 20,100 respondents. The sampling method was random. Personal interviews were employed. There were 91 titles on shuffled coloured masthead cards.

A special hurdle question, seldom employed elsewhere, established whether a title was totally unknown to the respondent, whether known by name, or had it in hand before.

This was followed by a 12-issue-period filter question, with periods appropriate to publication frequency, followed – in that order – by a 12-point numeric frequency question and a disclosed recency question.

These details are still the same, except that the sample is now 26,000 and the media list includes 175 titles, according to the 2001 Summary.

However, there were experiments, some resulting in changes to the survey specifications, but often not. In 1983 it was reported that experiments were underway covering three subjects. One was to test the optimum size of masthead cards for the survey, another one was question order, and the third whether the frequency scale should be reduced from twelve to seven points.

In 1985 we were told that these experiments resulted in changes to the size of masthead cards, which were halved, and to the sequence of asking the readership questions. Hurdle and filter questions were now administered vertically, and frequency and recency questions horizontally; they were all administered vertically before. The frequency scale was not changed.

During the latter part of the 1980's and the early part of the 1990's, AG.MA's activities centred around what they call their "partnership model". This model implies that, under the organisation's control, its separate press and broadcast surveys, and the TV panel of the GfK organisation (or of any future contractor), could be fused and offered as a combined database to planners.

Then there were the experiments concerning APX, Advertising Page Exposure. It was concluded that APX measures could not be part of the main interview, they had to be measured in a separate, parallel survey and then fused into the MA.

During the second half of the 90's, AG.MA conducted CAPI, Computer Assisted Personal Interviewing, experiments with pen-top computers. These were all reported to be promising but inconclusive. More work was needed before decisions could be taken. I understand that at present, pen-top experiments are continuing in Germany.

**Italy**

The Italian situation is complicated. In 1981, the starting point of my survey of surveys, and until 1993, there had been two separate surveys in Italy. One was for magazines, called ISPI, Indagine Sulla Stampa Periodica In Italia. The other was for newspapers, called ISEGI, Indagine Stampa Editori Giornali Italiani.

Both had large samples, 18,000 and 22,000 respectively, drawn for a personal interview by random methods. Both employed black and white masthead cards, both had 12-issue period filter questions, and frequency followed by recency questions, though there were some details of these readership questions which were different. 78 magazines and 43 newspapers were covered in their respective surveys.

As from 1988, the magazine survey split its sample, so as to be able to cope better with the increasing length of the media list. One half of the sample was for weeklies, the other for fortnightlies and monthlies. Both halves were fused. The total media list at that time was 114 publications.

Then in 1993, the Summary shows the survey details of a unified survey under the control of a new industry body, Audipress. With a sample of 55,000 it was in fact the fused database of the two previously independent surveys. In subsequent years, the sample was reduced for a common survey, which was split three ways: a sample for monthlies, a sample for weeklies and a sample for dailies.

In an unusual arrangement, there was a second interview with the same informant, in which those titles, which were not covered at the first visit, were asked about. This, I understand, was to help in the process of the final fusion.

This situation lasted until 1999. For the year 2000, a new contract was awarded involving new specifications. The new survey was to be conducted with CAPI, and a split media list was to be administered over two successive interviews with the same informant, a solution that was likened to the single source approach, and as such was favoured over the split sample and fusion approach.

However, the results of the new survey, due to be delivered this year, have not been published. Italy is at present without up-to-date readership data. New specifications are being drawn up for a new survey to start as soon as possible.

I understand that it is the two visits approach of the abandoned survey, not CAPI, which proved to be the problem.

From my observations, I fear that Italy is an example of far too hasty decision-making and the un-tried implementation of unusual new methods of readership research.


## Netherlands

The Netherlands is strongly associated with the FRY method, First Read Yesterday. In the debates of the early Symposia it was suggested that one possible way of overcoming the replication problem of the Recent Reading model was asking respondents about their first reading of a particular issue of a publication yesterday, as opposed to asking about any issue read in the last seven days (for a weekly) or the last 30 days (for a monthly).

This suggestion was taken up by a Dutch company, which specialises in telephone research. With the telephone method, it is much easier to control the sizes and profiles of relative large daily samples, which are deemed necessary with the FRY method, than it would be with personal interviews.

Consequently, after a few years of uncertainty, when there were at one time three rival surveys, one of them employing the new method, the Dutch market adopted the FRY method as its official industry survey in 1988 under the name SummoScanner. Other countries were also persuaded by the FRY argument and adopted this method, notably Denmark, Finland and Norway.

Critics of the method pointed out its volatility due to the relatively small sample sizes of first time yesterday readers, which the method generates in spite of large overall samples, and to the unsatisfactory solution of grouping titles together in order to be able to then expand their probabilities statistically.

In 1997, the news reached us that the FRY method was to be abandoned as from July of that year. But instead of moving from FRY to FRIPI, First Reading In the Publication Interval, as many had expected, the SummoScanner moved to conventional Recent Reading. Originally, FRIPI was developed in South Africa, with the same objective as FRY, namely to reduce model bias inherent in Recent Reading.

I understand that the results of the Dutch FRIPI experiments, which preceded the decision to move to Recent Reading, were not convincing enough. Differences in the results compared with Recent Reading were thought to be not large enough to justify the extra expense of asking the necessary additional questions.

A different problem exercised the Dutch. This was the length of the media list. The increasing length of the media list was shown to be the one outstanding factor with which they were able to explain, why readership scores showed long-term declining trends.

In the year 2000, the Dutch media list contained 175 titles. To minimise the negative media list effects, it was decided to increase the future sample from 24,000 per annum to 32,000, to split the media list and to administer it over a split sample.

However, at the time of writing, I am being informed that the SummoScanner ceased to exist as from July 2001. No definite decisions have yet been taken about the future specifications of the Dutch industry survey. There is the possibility that newspapers and magazines will go their separate ways and conduct separate surveys.


## Great Britain

In 1981, the British National Readership Survey covered 110 publications, using the masthead booklet methodology. For each publication group, there was a different frequency scale, underneath the masthead, which acted as the general filter for the survey. Only for titles for which a positive frequency claim was made, was the crucial "when last", the average-issue-readership, question asked.

At their introduction in 1968, the different frequency scales were found to be appropriate for their respective groups. For example, for a weekly publication the scale read "in an average month I read or look at this number of issues: 4, 3, 2, 1, less than one, none". For a monthly publication the scale was "in the last six months I have read or looked at this number of separate issues: 6, 5, 4, 3, 2, 1, none".

By 1981 we knew that this approach does not work. We found that informants did not understand in the interview situation, that we switched from one concept to another, and back again, depending on the order in which publications appeared in the booklet. They continued to think in terms of the frequency scale of the previous group. We called this the "Allt effect", after its discoverer.

More was wrong: the rotation effects of the masthead booklet method were discovered to be unseemly large. For example, our analyses showed that monthlies were receiving readership claims about 30% higher when they appeared in first position in the booklet compared with the claims they received when they appeared in the last position.

Another worry was that there was ample evidence of title confusion, which the booklet method did not seem to be able to overcome.

Finally, the most important item of dissatisfaction, as far as the marketplace was concerned, was the restrictive nature of the booklet method regarding the number of titles it can cope with. The limit was reached, and the term EML, Extended Media List, was born.

After extensive discussions and the testing of various alternative methods, the EML grouped titles method was introduced in 1984. I regard this event as one of the most important ones in the history of the NRS.

The media list was increased from 110 to about 200 titles, without lengthening the interview. This was made possible through the acceptance or rejection of grouped titles cards by the informant, in the card sort stage of the interview, without the need to make a positive or negative claim for each title individually.

The frequency scale was changed to a common, verbal scale for all publications. Readership in the past year became the common filter. This raised the number of readers passing the first filter, compared with the previous method.

Rotation effects were vastly reduced, as well as title confusion effects, compared with the booklet method.

The EML grouped titles method is still in place today. It remained the method of the readership interview after the NRS switched to the use of CAPI, in 1992, and it will still be its method after the introduction of DS-CAPI, double screen CAPI, in 2002.

The EML cards now carry about 300 titles. We regard this as the limit, even with this method.

Improvements were made along the way, and will be made in future. One was the introduction of mini-mastheads at the back of the cards in 1991. For the front of the cards we believe that typescript names remain essential.

Another important change to the EML procedure was made in 1992, with the change to CAPI. This was the introduction of a direct RPY, read-past-year, filter for each title individually, as opposed to an overall RPY card filter only.

Further changes will be made with the change to DS-CAPI, for which the cards will be translated into images on the informant's slave screen. The basic principles of the EML grouped titles method will stay untouched for the British NRS.


## USA

The debates between the proponents of TTB, Through-the-Book, and those of Recent Reading, who had a neutral forum in New Orleans, continued for several years, with new evidence presented pro and contra each at subsequent Symposia.

These debates lead the Americans to embark on a very impressive series of tests under the banner of the "Gold Standard". There were five tests, which were set up as observation studies to validate readership by using FRY, First Read Yesterday, methods. They tackled problems stemming from both home and public place reading events.

These tests showed, that under ideal conditions and with elaborate questioning, we are able to establish accurate readership claims. However, such methods would be totally impractical for the running of national readership surveys.

In the meantime, in 1983 according to the Summary of Current Readership Research, the Simmons organisation increased the number of publications which were measured by TTB from 50 to 110, presumably to match the number measured by MRI with Recent Reading. In 1988 they changed from a fixed order of presentation of publications to a rotated order.

Then, in 1995, Simmons abandoned Through-the-Book, replacing it with a "National Consumer Survey". This survey employed a self-completion mail questionnaire with a six-month filter and a frequency question, and no recency question, for about 270 publications. The new survey has since been discontinued.

The commercial winner of this process, the MRI survey based on Recent Reading, has not materially changed the details of its method since my records began in 1981.

Today, 240 publications are measured by MRI (there were 165 titles in 1981). Shuffled black and white single title masthead cards are used. There is a "past six months" filter for all magazines, followed by a numeric 5-point frequency question, followed by a disclosed recency question. There is an extensive list of "quality of reading" questions.

MRI has experimented with CASI-Audio, Computer Assisted Self-completion Interviews. This method would eliminate the need for interviewers to ask questions, and they reported encouraging results at recent Symposia. However, there is no sign, that this method will be replacing the current MRI method soon.

**Conclusion**

What do I conclude? This review has shown that a great variety of methods are used around the world. This has not much changed since 1981. However, I believe, that today we are using our methods more knowingly than we did twenty years ago.