

A MAIL ACCESS PANEL SURVEY ON READING AND READING FREQUENCY: EXPERIENCES AND INSIGHTS

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Introduction

Frequency has always been one of the most important aspects of the readership measurement discussion. The question of frequency supplements the Average Issue Readership (AIR) measurement and, until 1971, it was actively used for the calculation of reading probabilities in Germany. Over the years, the question of frequency has become less important. At present, these data represent just one of several active variables in the segmentation process in order to establish reading probabilities among the broadest readership per title.

However, the international discussion continues, demonstrated by the large number of papers presented at the readership symposiums in New Orleans, Berlin, Hong Kong, San Francisco and Vancouver, to mention just a few. Thanks to Michael Brown we now have a rather complete list of issues and research as to questions of frequency, summed up in his book "Effective Print Media Measurement".

Everybody knows that reading frequency is important, but the contact quality to a magazine is just as significant. It is likely that a frequent reader is more involved, more interested in the magazine, reading it more thoroughly and, therefore, more apt to see and memorize the ads. Another important aspect is the reading situation. Relaxing in the garden in a leisurely atmosphere while enjoying a nice cocktail obviously is different from reading in a noisy environment, with children yelling for ice cream or spaghetti. In our paper we would like to concentrate our focus on the quantitative part of the discussion:

In his book Michael identified five major areas of discussion relating to the design of reading frequency questions:

- Scale length
- Historical vs. habitual behaviour
- Number vs. proportion of issues
- Scale labels
- Single vs. multiple scales

A lot of research has been done in these areas, with quite a few answers identified. Although it has not been possible to make a final and clear decision as to the solution, we were able to come up with recommendations based on the results of several research activities.

Earlier this year we realized that in most instances our research tells us a lot about the readers of our own publications. However, it is quite difficult to make representative comparisons between our own readers and those of the competition. It is, for example, very interesting for us to learn why readers do not only read "our" magazine but also that of the competition, very often not only alternately but parallel, and why they buy the same issue of two directly competing magazines with rather similar contents at the same time, reading them simultaneously. To assemble a large enough group of people that read and, perhaps, also buy certain predefined combinations of magazines, to be interviewed and analyzed at a later date, an access panel was chosen as the most appropriate method for this project. Therefore, in cooperation with Infratest we added a variety of questions to the annual questionnaire sent to the 30,000 individuals of the TPI mail access panel:

Broadest readership - as a "general filter" we used the question of the AG.MA survey "*already held in hand*", followed by the question on **recent reading** within twelve publishing intervals as the "broadest readership". For weeklies this means "*read during the last three months*", for bi-weeklies "*read during the last six months*" and so on. Additionally, we asked for the reading and buying frequencies "*how many of the last twelve issues*", using no specific scale but asking to fill in the respective number. Please remember: It was a mail questionnaire, and for this reason we were not in a position to use masthead cards, but printed small logos of a total of 36 magazines instead (with four different publishing intervals).

Obviously, it was our intention to identify readers and buyers and not to replicate readership surveys since access panels are clearly very different from a methodological point of view.

Nevertheless, we feel that some aspects relevant for readership survey discussions were identified. Three main areas will be discussed today:

1. The suitability of general data, such as awareness and the size of the broadest readership
2. The high d.k. figures in regard to the question of frequency
3. The discrepancies in the outcomes of the frequency question

Some Methodological Background

Before introducing some of the results I would like to mention several details in regard to the access panel of TPI.

Originally, this panel was established to conduct surveys with housekeepers, especially product tests – mainly for Procter & Gamble. The panel has been extended to 45,000 households during the past few years. The majority of these households has been recruited via mail, based on geographically dispersed random samples of postal addresses.

When enlisting “the household” the socio demographic data of all members were recorded, and we asked that they participate in special surveys from time to time. On these grounds, and based on the date of birth and gender, we decided which member of the household should answer the questions for the survey in question. The aim of this exercise was to interview a representative sample of the German speaking population 14 years+.

The following graph shows the unweighted structure of the sample of our mail access panel (based on 26,528 interviews from October to December 2000) as compared to the weighted socio demographic structure of the second wave of the “MA 2001 Press Media”, surveyed from November 2000 to March 2001.

The major difference in the socio demographic structure is that the access panel contains relatively few individuals of 70 years+ thus reducing the share of pensioners. Furthermore, larger multiple member households are over proportionately represented. In addition to the low rate of senior citizens this reflects the original purpose and the requirements of the main mail access panel client. As far as the regional aspects are concerned the consistency with the AG.MA reference figures are excellent. In regard to household net incomes as indicator of social status the differences are minimal.

	TPI Mail Access Panel In %	MA 2001 Print Media II In %
Men	46.0	47.8
Women	54.0	52.2
Age		
14 - 19 years of age	6.5	7.8
20 - 29 years of age	13.7	12.6
30 - 39 years of age	31.5	18.7
40 - 49 years of age	22.6	16.8
50 - 59 years of age	11.6	15.3
60 years+	14.0	28.8
Size of household		
1 person	12.4	19.2
2 persons	26.7	36.1
3 persons	22.1	20.0
4 persons and more	38.7	24.7
Profession		
Apprenticeship/training/student	8.7	10.4
Employed	62.6	51.7
Pensioner	11.9	27.4
Not employed	9.8	10.5
No response	7.0	--
Household Net Income		
Less than DM 2,000	7.8	10.0
DM 2,000 to less than DM 2,500	7.6	8.9
DM 2,500 to less than DM 3,000	9.7	10.3
DM 3,000 to less than DM 4,000	21.6	22.5
DM 4,000 to less than DM 5,000	20.2	20.7
DM 5,000 and over	26.8	27.7
No response	5.3	--

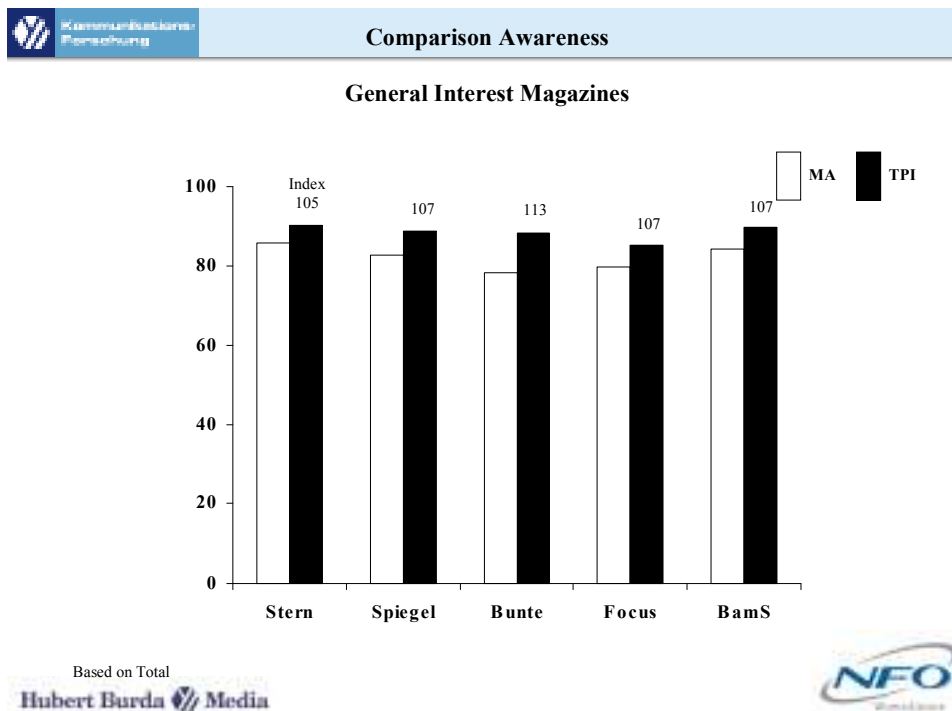
Groups of Federal States

Nielsen I	14.6	16.0
Nielsen II	21.4	21.3
Nielsen IIIa	15.7	13.4
Nielsen IIIb	12.3	12.0
Nielsen IV	14.6	14.5
Nielsen V	3.7	4.0
Nielsen VI	8.7	9.5
Nielsen VII	8.9	9.3

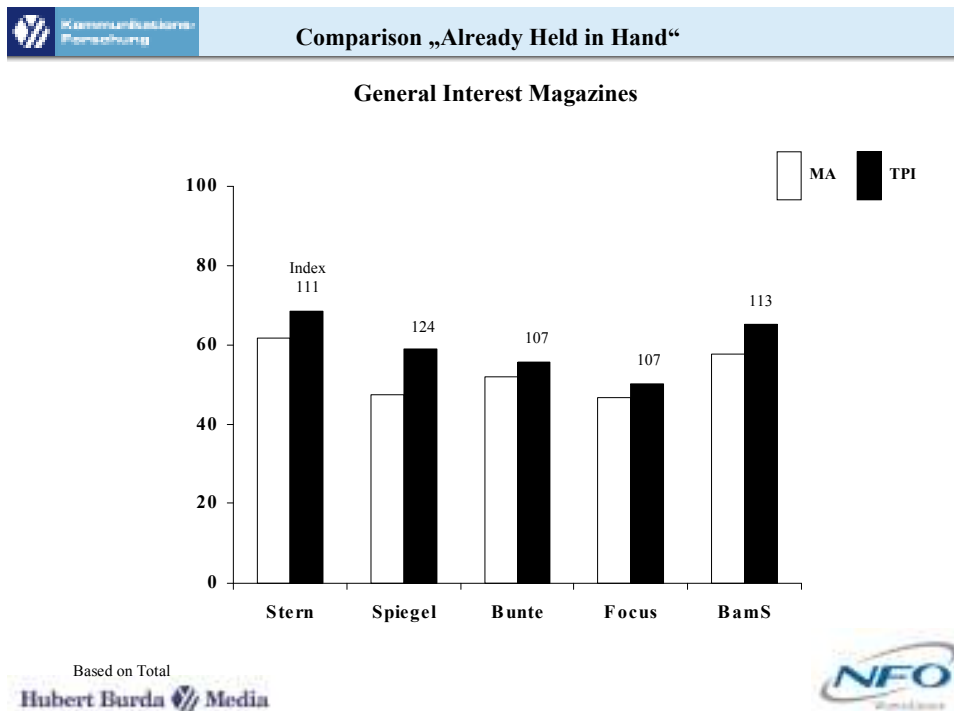
For the presentation of the following results we weighted the data of the study in accordance with the figures of the MA in order to ensure the adjustment of deviations in the results exclusively due to differences in socio demographic structures. Please let me draw your attention to a specific aspect of the mail survey that differs from the face to face interview of the MA. Individuals not responding “*already held in hand*” to the “basic filter question” for a specific title, will not be interviewed further. In the mail survey the respondent will also notice the next question plus guidelines, black on white, and if he does not respond to the “basic filter question” but indicates frequency such as “*read during the past three (or six or twelve) months respectively*” instead, this individual will be identified as a member of the broadest readership. Thus the “hard” and especially selective filter system in Germany is “softened up” a bit in the mail survey – at least theoretically – in favour of a larger reach.

Part 1: Comparison of Awareness and Broadest Readership – Mail Survey vs. MA

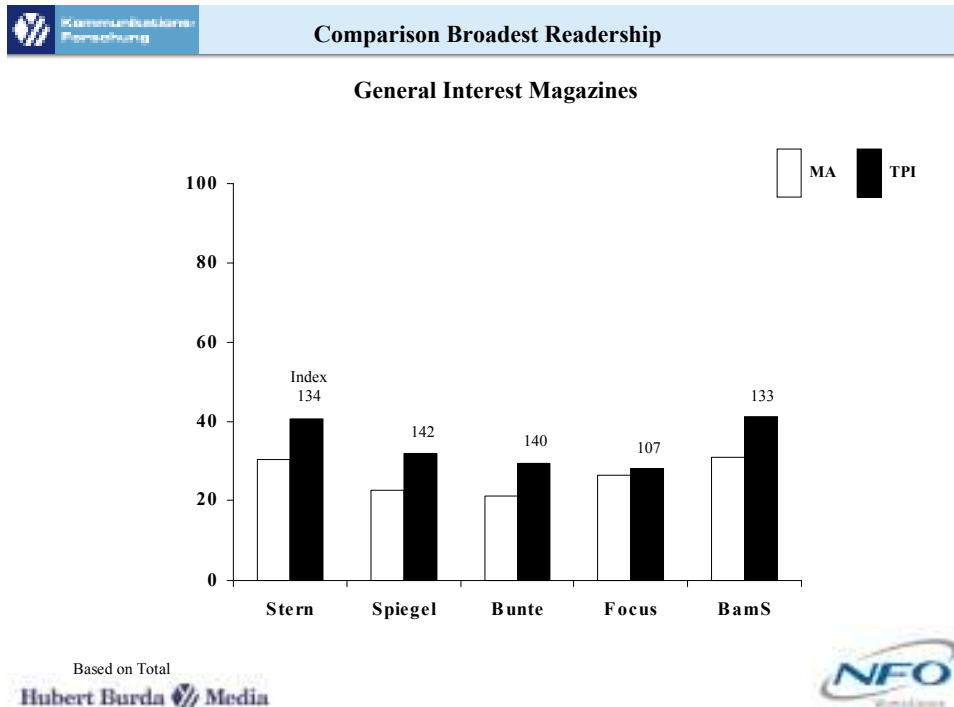
In the mail survey the awareness of the largest **general interest magazines** is higher than in the MA, however, never more than 25%. The same is true for “*ever read*”.



The results of “already held in hand” are also quite consistent:

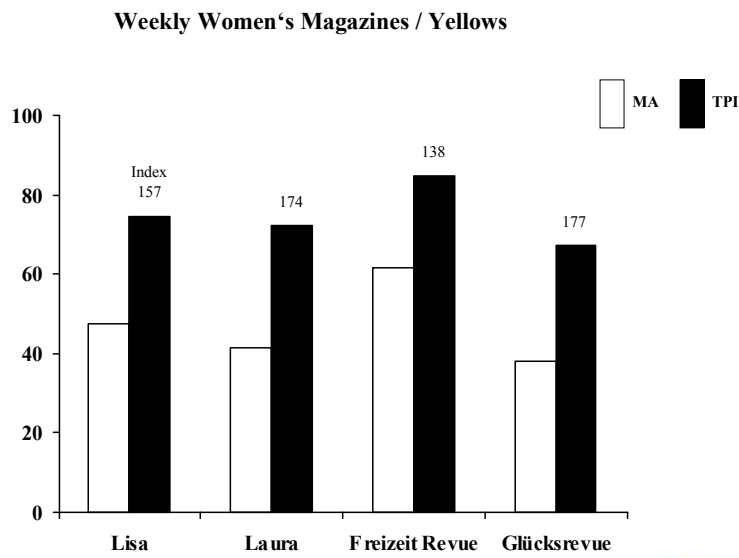


However, with the exception of *Focus* the broadest readership is one third or even more above the rating of the MA as far as these general interest magazines are concerned:



In regard to the **weekly (“low image”) women’s magazines** and **yellow press publications** the shares of “awareness” and “already held in hand” are significantly more pronounced in the mail survey, in the category of “ever read” at times twice as high as in the MA.

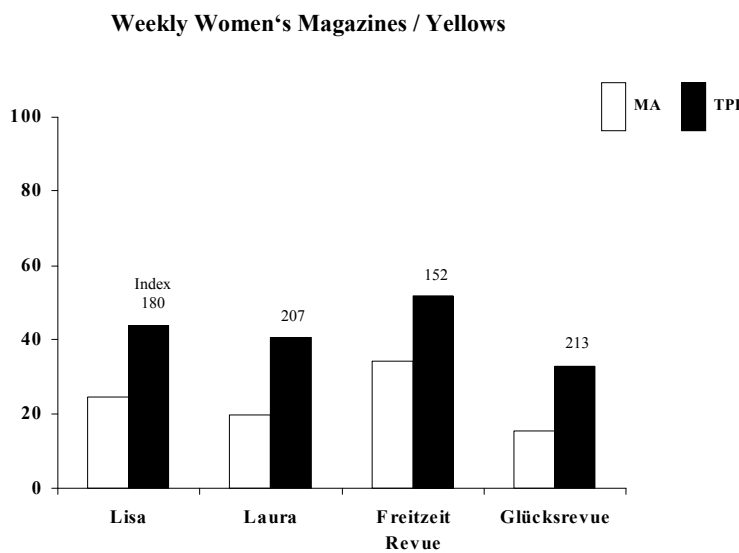
Comparison Awareness



Based on Women
Hubert Burda Media



Comparison „Already Held in Hand“



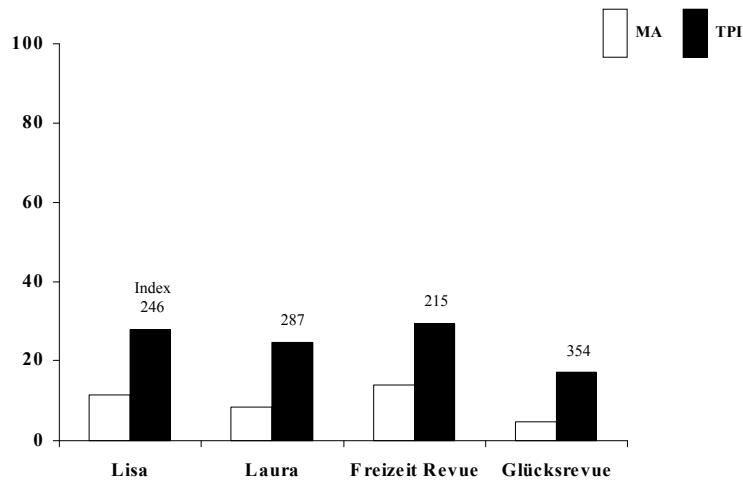
Based on Women
Hubert Burda Media



However, in the mail survey these publications definitely have another dimension than in the MA as far as the broadest readership is concerned. All four titles under investigation scored more than twice as high, and in one instance almost four times higher than in the MA.

Comparison Broadest Readership

Weekly Women's Magazines / Yellows



Based on Women

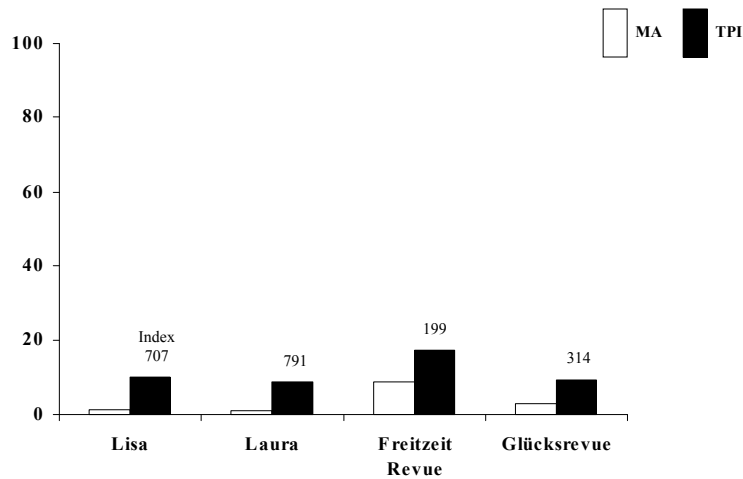
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Up to now we only looked at the figures of female readers. When investigating the broadest readership of these titles – especially the “pure women’s publications” –we detect an even more extreme discrepancy in regard to men:

Comparison Broadest Male Readership

Weekly Women's Magazines / Yellows



Based on Men

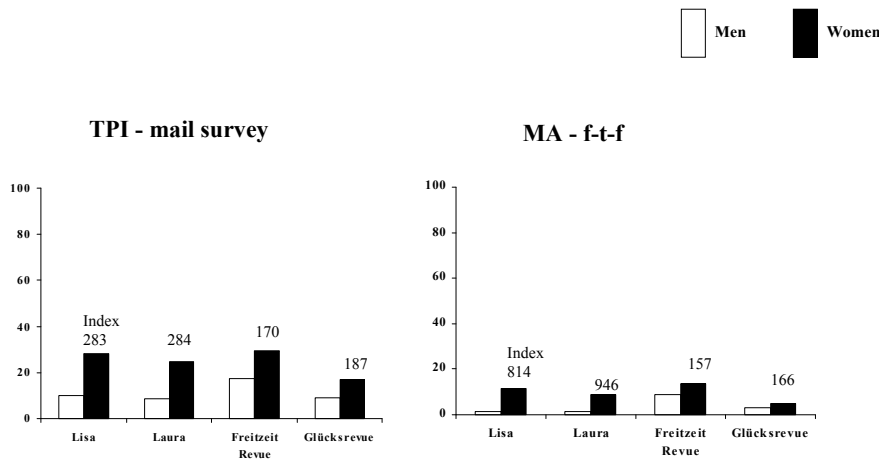
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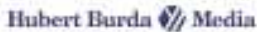
We should also have a look at the relationship between men and women in regard to the broadest readership of these more or less typical “low image” women’s publications and yellows in order to exemplify the peculiarities of these two approaches under another aspect as well:

Comparison Broadest Male vs. Female Readership - According to TPI/MA

Weekly Women's Magazines / Yellows



Based on Men / Women Respectively

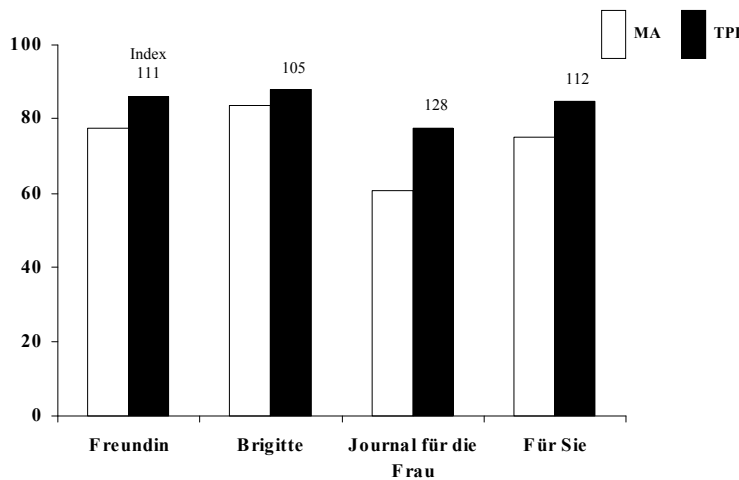


While in the MA the relationship between the broadest female readership and the broadest male readership for low image women's weeklies is approximately 8 : 1, in the mail survey obviously more men "admit" reading these publications, so that the relationship is approximately 3 : 1 in that case. On the other hand, the relationship between the broadest female readership and the broadest male readership for the two yellows of the MA and the mail survey is more or less identical, with the written version scoring even slightly above the MA results.

Let us take a look now at the four "classic bi-weekly women's magazines" in Germany, neither of which is part of the low image group.

Comparison Awareness

Bi-Weekly Women's Magazines

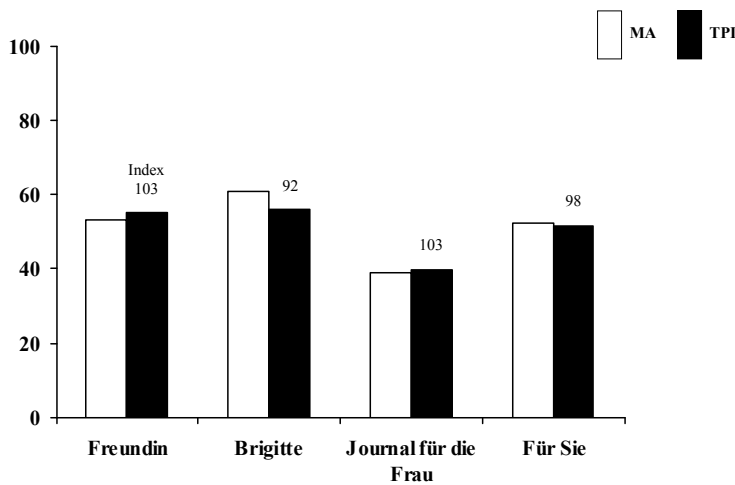


Based on Women

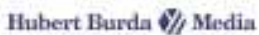


Kommunikationswissenschaftliche Forschung **Comparison „Already Held in Hand“**

Bi-Weekly Women’s Magazines



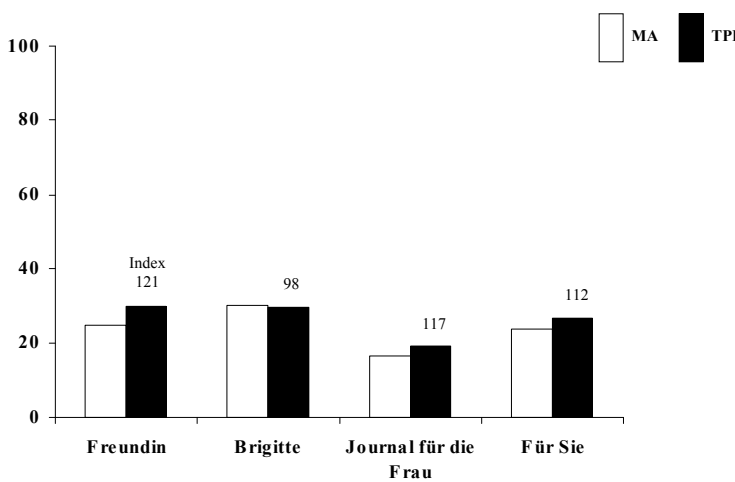
Based on Women



In regard to awareness the results of the mail survey vary between 5% (for *Brigitte*, the most popular with the “best” image) and 28% (for *Journal für die Frau*, the least popular with the “worst” image) above the MA ratings. As to the “ever read” rating the results of the MA and the mail survey of the access panel are quite close by and large.

Kommunikationswissenschaftliche Forschung **Comparison Broadest Readership**

Bi-Weekly Women’s Magazines



Based on Women

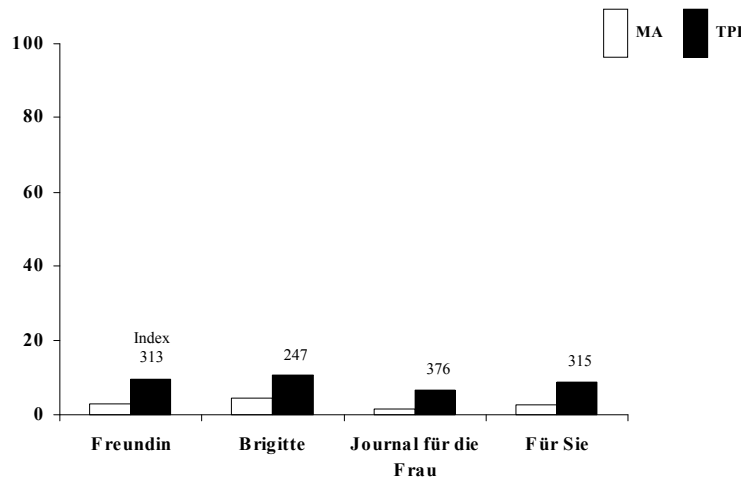


The broadest readership does not show any extreme discrepancies between the MA and the results of the mail survey either. With the exception of *Brigitte*, they came out above the face to face findings.

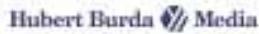
These classic women’s bi-weekly magazines also warrant a closer look at the broadest male readership.

Kommunikations-
Forschung **Comparison Broadest Male Readership**

Bi-Weekly Women's Magazines



Based on Men

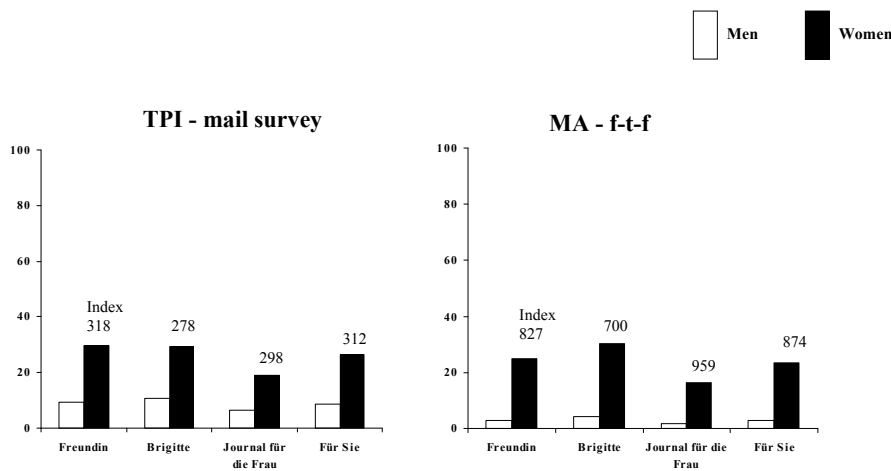


Here they are again, the significant differences between the MA and the mail survey of the mail access panel. The broadest male readerships of these publications differ more or less by a factor of three, a bit more for the title with the worst image, a bit less for that with the best image.

Now, what would the proportion of women in the broadest readership of the classic women's magazines be as compared to the broadest male readership of the individual magazines?

Kommunikations-
Forschung **Comparison Broadest Male vs. Female Readership – According to TPI/MA**

Bi-Weekly Women's Magazines

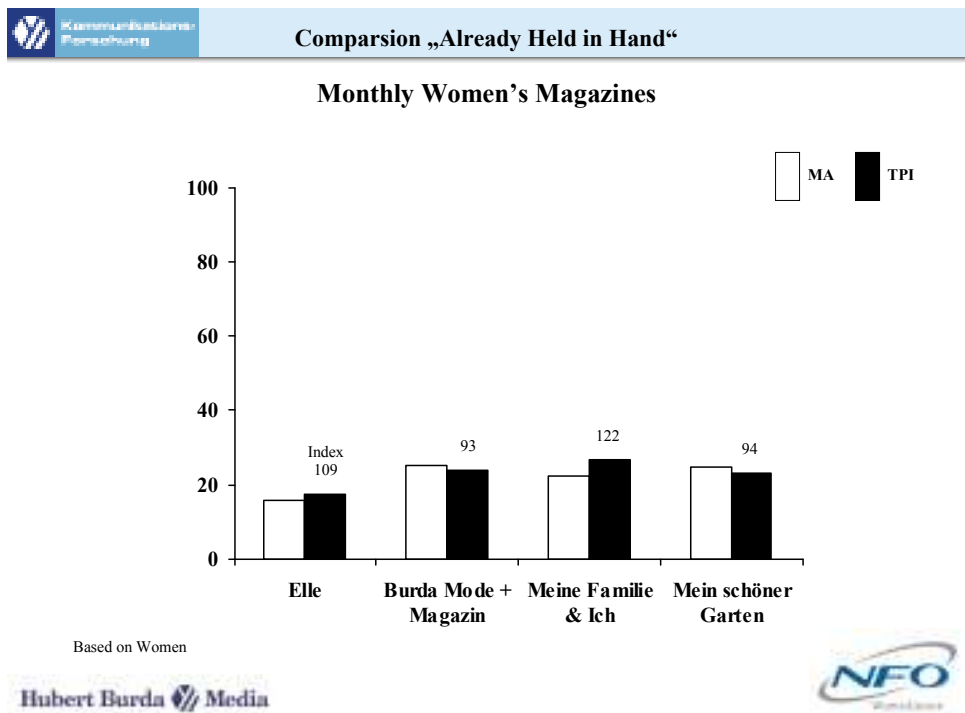
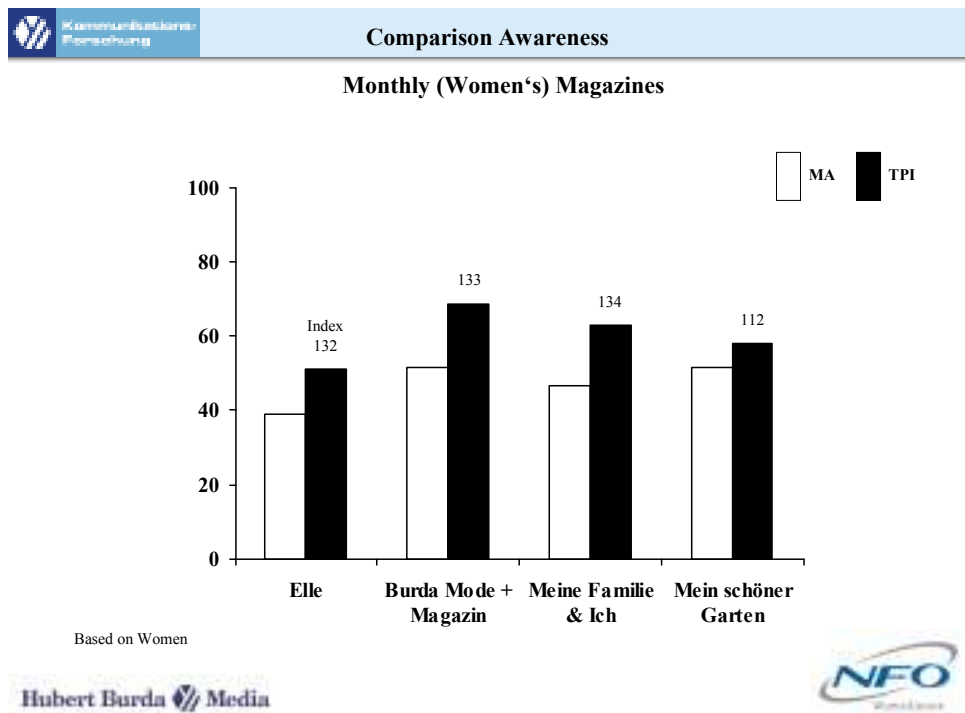


Based on Men/ Women Respectively



Similar conditions prevail as for low image publications: In the MA the broadest female readership is approximately eight times that of the broadest male readership, whereas in the mail survey the proportion is only 3 : 1!

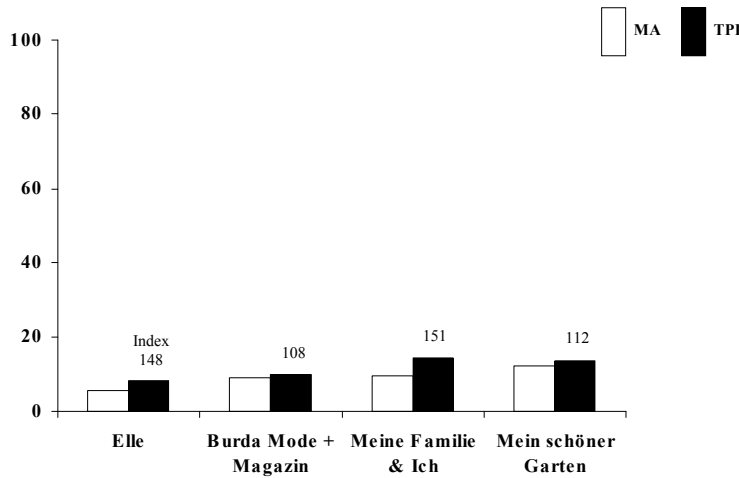
Could it be that the differences uncovered are mainly attributable to the fact that a publication obviously is addressing women or avoids targeting a specific gender? (A typical “men’s magazine“ was not featured among the magazines included in the mail access panel.) Or could this also have something to do with the publication interval? In order to increase the level of confidence we also added the results for a number of **monthly publications**:



None of these publications belongs to the low image segment either. Apart from the title *Mein schöner Garten* - the only monthly magazine without a clear “gender preference” - the level of awareness was around one third above the MA findings in the mail survey. Depending on the the type of publication the “ever read” rating arrived at a maximum of 22% above (*Meine Familie & ich*) to 7% below the results of the MA (*Burda Mode + Magazin*).

Kommunikations-
Forschung **Comparison Awareness Broadest Readership**

Monthly (Women's) Magazines



Based on Women

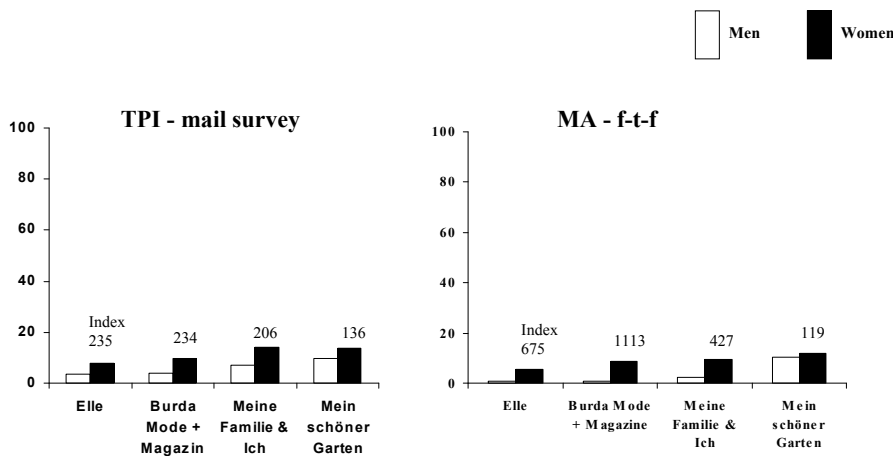


In regard to the broadest readership, the results of the mail survey were around 50% above the MA findings as far as *Elle* and *Meine Familie & ich* are concerned, whereas the results of the mail access panel and the MA were quite similar for *Mein schöner Garten* and *Burda Mode + Magazin*. All in all, the differences are not as pronounced as in the case of the low image women's publications and the yellows, but stay within the scope observed for the classic women's magazine.

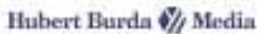
Here we also observe significant differences between the MA and the mail access panel as to the male readership, however, the level of divergence is similar to the classic bi-weekly women's magazines, with the exception of the rather "gender neutral" title *Mein schöner Garten*, for which the broadest male readership of the MA and that of the mail access panel are quite similar.

Kommunikations-
Forschung **Comparison Broadest Male vs. Female Readership – According to TPI/MA**

Monthly (Women's) Magazines



Based on Men/Women Respectively



When comparing the broadest male and female readerships of the MA and the mail access panel, the monthly women's publications show similar results as the classic bi-weekly women's magazines and the weekly low image publications. It looks as though the differences between the survey methods are less pronounced for *Meine Familie & ich*, a magazine for the whole family. In case of the "gender neutral" title *Mein schöner Garten* there is hardly any divergence at all.

Part 2: "No Answer" in the Frequency Question

The German Media Analysis does not permit a response of "don't know" in regard to the question of frequency. In order to determine the broadest readership the question of frequency is asked after the "first time filter", and in Germany this is the interval during which the last twelve issues of the respective title have been published. It openly asks how many of these last twelve issues have been flicked through or read, mentions the appropriate interval twice and utilizes the following scale as prompt and recall aid for the respondents:

"Of the last twelve issues of this magazine I flicked through or read

- 1 just one issue
- 2 - 3 issues
- 4 - 5 issues
- 6 - 7 issues
- 8 - 9 issues
- 10 - 11 issues
- 12 all issues"

Based on this scale, a number of respondents might feel that it would not matter if they indicated 2 - 3 or 4 - 5. However, when in doubt, the interviewers were instructed by the agency to encourage the respondents to give an estimate. For data files without indication of frequency for one or more publications the frequency is 6 (it has been our experience that the non adjusted quota is less than 1% to a maximum of 3% per publication in regard to the broadest readership).

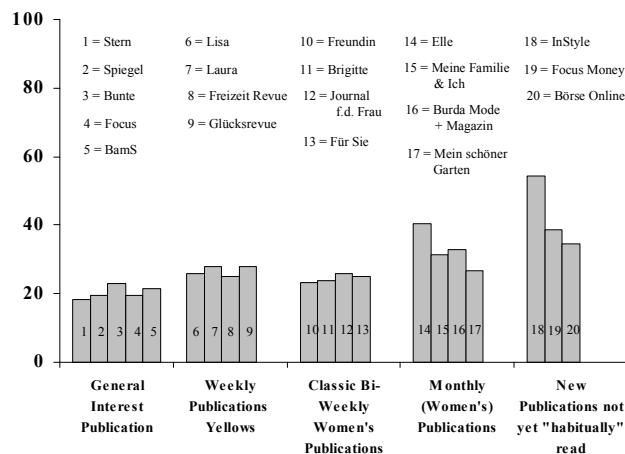
With the assistance of the interviewer and the scale that encourages "rough estimates" it looks as though there do not seem to exist significant problems as to recall or decision making in regard to the MA and the question of reading frequency. This is quite different in the mail survey of the access panel. Even though the respondents are used to written inquiries, many of them are not in a position to answer the question of frequency. In regard to the broadest readership per title we came up with the following shares of "don't know" among all respondents:

For all women's publications the shares of male "don't know" responses in the broadest readership category are significantly higher than for the "total", and the "don't know" shares of women in the broadest readership category of business publications are also higher than for the "total".

Kommunikations-
Forschung

Frequency Question According to MA

„Don't Know“ Shares Based on Frequency per Title



Based on Total

Hubert Burda Media



Part 3: Structure of Reading Frequency

Actually, these high “don't know” shares have not been registered in the entire survey that contained a wide variety of subjects as well as other numeric details.

If taken seriously, it appears that the question of frequency as to magazine reading seems to overstrain the ability of recall of the respondents. This is in no way a new finding. It actually crystallized during the period 1965 to 1970, when numerous test methods were tried out, and researchers struggled hard to find the “correct” question phrasing for readership surveys. As stated before, the question was “improved” and, above all, its central importance for determining reach and the establishment of “cumulations” was reduced by creating the method of calculating the “reading probability” still used at the present time.

Furthermore, the question of frequency plays an important role as an active variable in the segmentation of the broadest readerships, especially in regard to the structure of readerships, determined by the readership analysis. Therefore, it might be a good idea to check again after so many years whether the question of frequency still functions “satisfactorily”. In any event, we have reason to believe that the results of our mail survey confirm our hypothesis that the interviewer - not the respondent alone - is able to influence the results considerably. The uncertainty encountered in responding to the question of frequency presumably depends on several factors that will be phrased as a hypothesis for possible verification at a later date. It appears that the uncertainties become more pronounced

- if reading a certain publication touches on the respondent's self image, either negatively or positively: The better the image of the publication in the eyes of the respondent, the better the recall of the amount of the issues read during twelve publication intervals.
- the longer the publication interval and thus the lapse of time for which the respondent was asked to answer the question of frequency.
- the more sporadic the contact with the publication, i.e. if the opportunity of “habitual” reading has been limited. Thus the high proportion of “don't know” shares for very “young” publications. This might also explain why younger people and (actually) infrequent readers happen to have extreme recall difficulties. (For further details please read on.)

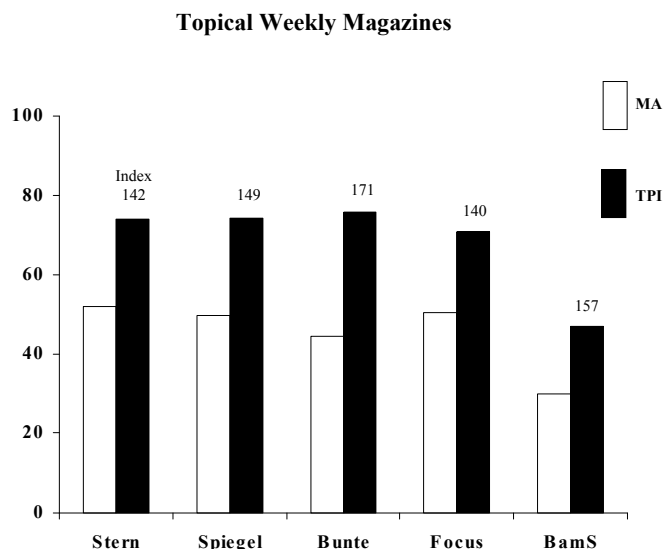
It is assumed that these factors do not act independently but in conjunction with each other so that, due to the overlap with the data of the final analysis, originally gathered for a different purpose, further examination is not feasible. This should be reserved for especially designed experiments.

We discovered that, except for the “classic” bi-weekly women's publications, it was possible to increase the broadest readership considerably as far as low image titles were concerned, and in case of the “renowned” topical weeklies, as well as certain monthlies, the increase in the written interview was quite noticeable. Based on this, one could assume that this increase is

attributable to the fact of having more time available, and thus giving the answers more thought in the written interview. On the other hand it might be due to the „pressure“ exerted by the interviewer, that a larger proportion of infrequent reading was applied to the frequency question. Or that individuals participating in market research panels generally read more so that the discrepancies are simply a problem of the “lopsided sample” of the access panel. The following results show that the first aspect might indeed play a role, however, presumably not a crucial role, and that the second assumption is simply inapplicable.

In order to be able to compare the infrequent readers, i.e. the broadest readership that just read up to three issues out of twelve in accordance with the face to face interviews of the MA and the written inquiries, we calculated the corresponding percentages of the mail survey for **all responses** given to the frequency question. This means that the “*don't know*” proportion has been excluded. (In the event that the plausible hypothesis mentioned under c) is correct, the share of infrequent readers of the mail survey would actually increase slightly.)

Comparison Share of Infrequent Readers (Frequency 1 - 3)



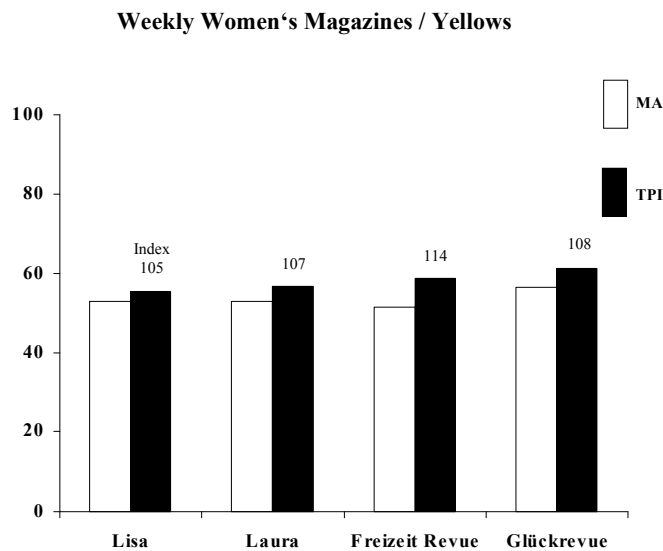
Based on Total



As far as the prestigious **general interest magazines** are concerned it appears as though the broadest readership, approximately one third higher in the mail survey, originates mainly from the larger number of “infrequent readers”. Thus the mail survey would not be suspected of generating higher results due to “image reasons”. Furthermore, an interacting interviewer would not be impressed by a statement such as “*on a regular basis, naturally*” in regard to reading prestigious magazines. Could it be that the MA does not record the true number of infrequent readers and thus, in total, does not feature enough readers of general interest magazines? Is it possible that the MA does not reflect a realistic readership structure and makes the mistake of partly distorting it due to the respondents’ tendency to use the glossy image of the magazines for their own purposes?



Comparison Share of Infrequent Readers (Frequency 1 - 3)



Based on Total

Hubert Burda Media

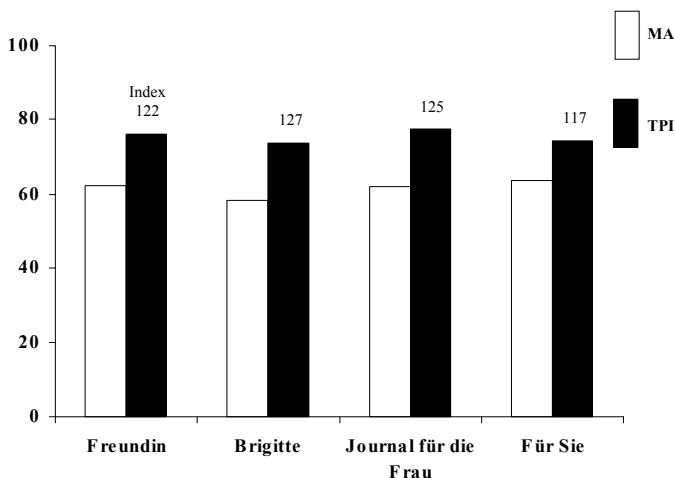


As far as the **weekly low image women's magazines and yellows** are concerned the readership structures of the MA and the mail survey happen to be quite similar, which is also true for regular and frequent female and male readers. However, in the mail survey the broadest readership is two or even three times larger! The discrepancy is so significant that it simply cannot be explained by the "peculiarities of the sample". Again, it makes sense to assume that, in the MA, due to the adverse social regard for reading such publications, they are simply „forgotten“ by the respondents, especially by men.

And, perhaps, there might be another methodological aspect that plays a role in the execution of the mail access panel survey. The questionnaire is usually sent to the housekeeper and mailed back by that individual as well. This also happens to be the case if another member of the household filled in the questionnaire. In around 85% of multiple person households this is a woman. Thus she is aware of the answers, even if a male member of the household has been targeted to answer the questions in regard to reading and buying magazines. This means she knows that the man also looked at "her" magazine - and he knows that she knows! Does such social control actually permit "true" results? Could it be that the MA does not cover a realistic number of male readers and not enough female readers of weekly women's magazines and yellows either? Does the MA reflect a "true" picture of the readership or does intellectual and social contempt facing these publications reduce the findings of the survey?

Comparison Share of Infrequent Readers (Frequency 1 - 3)

Bi Weekly Women's Magazines



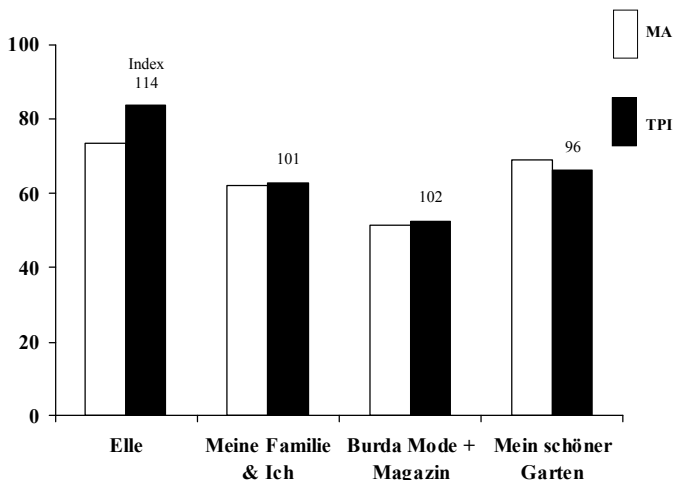
Based on Total



In regard to the “classic” bi-weekly magazines the broadest readership of the MA and the written mail access panel correlate pretty well, with the results of the latter being slightly higher. However, as far as men are concerned the mail survey covered distinctly more readers of these female publications. As a whole, the share of “infrequent female readers” is larger in the mail survey than in the MA, whereas the shares of “regular female readers” is almost identical. The question is whether or not the MA reflects the true amount of infrequent female readers. Why would respondents of the written survey telescope phases of reading into the broadest readership that date back more than six months (and thus took place even before the broadest readership filter)? Could it be that the MA distorts the true readership structure, especially in regard to too little men? (“Macho syndrome”: A man does not read women’s magazines!)

Comparison Share of Infrequent Readers (Frequency 1 - 3)

Monthly (Women's) Magazines



Based on Total



As for the **monthly magazines**, the MA and the written access panel inquiry show the highest degree of consistency. In regard to *Mein schöner Garten*, reach and readership structure are a good match, since the publication does not pose any image problems and happens to be “gender neutral”. On the other hand, female publications such as *Elle* and *Burda Mode + Magazin* experience the phenomenon of great discrepancies in men – see above. And *Elle* has a considerably higher reach in the mail survey, also identifying significantly more „infrequent female readers”.

Outlook

So many questions and hardly any answers? We assume that the results of the written mail access panel inquiry covered in this paper will serve to provide an indication as to which questions and which results of the MA should be re-examined at the beginning of the new millennium.

Even though we do not believe that the mail access panel could become an ideal instrument for readership research or that the German MA should be conducted in writing in the future, it might be a good idea to refresh the “well known” with new ideas. In our opinion this certainly would not do any harm to such a renowned and well known survey as the German Media Analysis.

