

WHEN TWO WORLDS COLLIDE OFFLINE MEASUREMENT OF ONLINE READERSHIP

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Introduction

Most publishers now offer online versions of their major publications and increasingly there is a need to identify the unique audiences to each vehicle to optimise the product and therefore audience development. Furthermore, the likelihood is that many publishers will offer advertising packages that include both online and traditional printed editions – under these circumstances it will be essential to identify online and what, for the purposes of this paper, I'll call “offline” readership duplication, net coverage and frequency. This in turn necessitates an accepted measure of online reading that can be analysed *alongside* traditional print readership measures.

The feasibility and apparent benefits of metered online audience traffic measurement are driving the creation of large-scale panels in most countries. However, such panels are not without their limitations. They only cover the Internet Population and, more seriously, the difficulty of placing meters on PCs in the workplace (due to employer network restrictions) is leading some publishers to believe that total audiences to their online publications are being seriously under-reported by the metered data.

Over the years, many hours have been spent at Worldwide Readership Research Symposia examining the “correct” way to measure readership of print publications. We have had, at times, heated debate regarding the relative merits of Recent Reading, Through The Book, FRY and FRIPI. However, as Scott McDonald flagged as long ago as the Berlin Symposium of 1995, readership researchers will have to acknowledge the increasing significance of reading electronic versions of these traditional print publications. Initially, his concern was that the currency measures of print readership would be corrupted by respondent confusion regarding the way in which the title was accessed, online or offline – what he dubbed “location confusion”. This remains a valid concern and there is little evidence that print measurement studies are actively addressing the issue. However, as online versions of print titles become more significant and command larger and unique audiences, we must consider more carefully the validity of online audience measurement per se in the context of traditional readership research. It is no good having a gold standard measurement of print readership if the measurement of online readership of those titles within the same study is fundamentally flawed.

The aim of this paper is therefore to review what lessons we have learned about measuring readership of online publications within “offline” readership surveys – in other words the face-to-face, telephone and self-completion surveys typically used to measure audiences to traditional print titles.

Key Limitations of Metered Readership Data

The under-representation of work PCs within metered online audience measurement panels is a particular concern for publishers, most significantly for business-to-business publications. However, as providers of news and information, many consumer titles will feel that the under-representation of work use will seriously under-estimate total audiences to their titles. One upmarket, national newspaper in the UK believes the audience to its online edition is under-reported by the metered panels to the tune of 80%. Whilst we do not have data to prove this definitively one way or the other, recall data lends at least some support to the assertion that total audiences are under-reported.

Table 1 – Unique Visitors (Aided Recall)

Website	Home Users		All Users		Increase
	%	Millions	%	Millions	
Population		12.98		16.64	
The Times / Sunday Times	15	1.95	13	2.16	+11%
Guardian Unlimited	12	1.56	12	2.00	+28%
ft.com	12	1.56	11	1.80	+15%
Electronic Telegraph	10	1.30	9	1.50	+15%

Source: BMRB Internet Monitor (Feb 2001)

The publications shown are all “upmarket” titles. The readership penetration amongst those who *only* use the internet away from the home (work, internet cafes, college etc.) is generally slightly lower than those who do have internet access at home (which includes those who also have access at work). But when these figures are grossed up to population estimates the lower penetration is more than compensated for. In the case of Guardian Unlimited, readership by all respondents who have access at home is equal to that reported by all internet users – however, when these percentages are converted to millions, the total audience estimate is 28% higher than the audience just amongst those people who have home access.

Secondly, the size of the meter panels in many countries limit their ability to provide data for niche publications. In the UK, the three main meter panels operated by Jupiter MediaMetrix, Nielsen NetRatings and NetValue all have panels below 10,000 individuals. This compares with the National Readership Survey of print media with an annual sample size of 36,000. Concern regarding the size of panels, together with a desire to harmonise audience definitions, has prompted the JICNET initiative in the UK, supported by the agency and advertiser trade bodies, to standardise definitions and, potentially therefore, to merge the panels to provide a single larger audience measurement panel.

There are of course possible solutions. In the US for example, comScore has assembled an opt-in panel of approximately 600,000 PCs, of which 25,000 are sited at place of work. This too under-represents their significance proportionately, but it is claimed that the vast absolute size of the work panel means that the data can be re-weighted to their correct proportion within the total internet population and still yield an effective sample size far greater than other metered panels.

As currently constituted, the metered panels are only measuring audiences to the online versions of publications and, indeed, are only endeavouring to represent the online population. If our goal is to measure both on- and offline readership in the same study, in principle it would be possible to gather print readership information from these same metered panellists. However, this approach is likely to be fraught with problems associated with administering the gold standard print readership questions to an online panel. Certainly, the panel operators should be concerned about the impact of this additional task on future respondent co-operation; given the huge cost of building the metered panels, anything that jeopardises response rates and increases panel churn will be viewed with caution.

The Recall Survey

The above assessment all points towards the need to optimise aided-recall questioning, at least in the short to medium term before the meter technology develops to permit the collection of offline readership data. The fact is that consumer print titles still generate far higher levels of readership than their online editions, so it makes sense that the survey used to measure *combined* readership is the preferred method for measuring offline reading. Furthermore, it is relevant that the established currencies for multi-media research (including the TGI studies around the world) at present employ traditional recall methods.

We know that online readership recall claims will suffer from all of the problems that affect print readership claims including title confusion, memory failure and over-claiming of major brands. However, these problems are exacerbated when respondents are asked to recall which websites they have visited recently. According to the Internet Corporation for Assigned Names and Numbers (ICANN), there are now 41 million registered domain name holders and, more confusingly still for respondents, some sites have several alternative addresses / entry points and different international sites. So, what are the key issues for measuring readership of online publications via recall research? I will summarise these into the following categories:

- Location confusion
- Title confusion
- Memory failure
- Title / site load
- Recency period

1. Location confusion

In Vancouver, Scott McDonald concluded “location confusion should be added to the roster of measurement problems to be studied and considered by this body and by the syndicated research firms represented here.” His key concern was the potential for media exposure spillage across borders potentially contaminating audience estimates for print media. Whilst some studies have introduced online as a response category for source of copy, many surveys including the National Readership Survey and TGI in Great Britain have not. Indeed, within the specification document for the recent NRS tender, online readership was not even highlighted as an issue for consideration by tenderers.

If our aim is to measure readership of publications in all formats within the same study, clearly the challenge is to encourage respondents to consider *all* of their exposure to publications both off- and online and for them to allocate their reading correctly to each. The “source of copy” approach is one possibility, i.e. asking about exposure to a publication brand generically and then identifying the source of that exposure. However, this approach suffers from a number of drawbacks:

- The online version of a publication may have a slightly (on occasions very) different title. To generate total readership claims for the brand both off- and online, all relevant titles will need to be prompted separately. However, we know that multiple logos / mastheads can cause respondent confusion and therefore yield lower total readership claims.
- There will be a need to stress the inclusion of *all* formats at the outset, and the likelihood is that particular attention will need to be given to the online edition so that it is not overlooked by the respondent. This initial prompting to include online readership may corrupt the measure for the print edition.
- An issue which I will deal with in more detail below, concerns the time period that is most relevant when gathering online publication recency claims. Suffice to say at this point, employing different time periods for the readership of off- and online versions will be difficult to handle within a generic questioning approach.

So, on balance, this does not seem to be an attractive way to proceed and suggests that to measure exposure to both off- and online versions, we should keep questioning about the two categories separate. This will enable us to focus the respondent on providing comprehensive responses for each medium in turn – printed publications and websites – and offers the opportunity to use the appropriate competitive set in each case.

However, keeping the two categories separate does mean that we must consider the precise wording of the questions so that spillage across borders is minimised. For example, the current NRS print readership question which is used as the template for most readership studies in the UK makes no reference to online editions, one way or the other. As forecast by McDonald, we are now reaching the point where online reading should be explicitly excluded within the print question and vice versa.

2. Title confusion

Publications generally wish to capitalise on the equity in their brand name, so typically the online edition uses the same or very similar name as the printed version. The appended Table 4, compares the brand names used for the printed and online editions of the larger circulation titles in the UK. The likelihood is that online title confusion exists to at least the same extent as for printed publications and therefore the measures commonly used to minimise this problem in the offline world are equally relevant when we are measuring recalled readership claims for online editions. Good practice such as grouping potentially confusable websites and employing logo prompts will undoubtedly benefit the quality of the data.

The complex online presence of many brands will add to these problems. One important component of our objective is to measure the combined reach of each brand off- and online, so we must define clearly for the respondent the boundaries of the online brand. Take, for example Vogue magazine. In the UK, the print edition can be defined relatively unambiguously, but respondents may well report readership of the Vogue websites linked to other international editions of the publication, for example:

- style.com/vogue (the US edition)
- vogueparis.com
- vogue.de

A similar question of boundary definition affects attempts to measure the websites connected with customer magazines. Magazines published by contract publishers on behalf of consumer and business-to-business brands are now some of the most widely read titles in the UK. However, whilst they do also have an online presence, this is generally via their commissioning brand / company. So, for example, high readership print titles such as Safeway Magazine, Sainsbury Magazine, AA Magazine do not have their own dedicated website, but Safeway, Sainsburys and the Automobile Association all have websites offering a wide range of e-commerce services and company information. Whether or not use of these sites is relevant in the context of an off- and online readership survey is a moot point, but it is a decision that must be made by the researcher.

One issue that affects newspapers specifically is the treatment of Daily and Sunday titles online. In the UK at least, different publishers approach the online versions of their Sunday titles in different ways. As is evident from Table 4, some choose to have separate sites, some use different channels within the same site and several have no online presence specifically for their Sunday title, presumably assuming that the Daily brand will suffice.

All of the foregoing discussion of title confusion points to the need for very accurate prompting of online brands. The online brand names may not in themselves be sufficient to define the extent of our interest sufficiently clearly – brand name plus address and potentially specific exclusions may well be necessary to elicit more accurate responses.

3. Memory Failure

Which brings us on to whether or not respondents are capable of remembering their online behaviour with sufficient accuracy and detail. Earlier in this paper, I discussed the limitations of metered panels. That said, once installed, meters do measure comprehensively all visits to websites by that *machine*, however brief or atypical the exposure. Clearly, it is a major challenge for recall studies to measure comprehensively all relevant online readership occurrences due to respondent memory fatigue and failure to consider all possible opportunities for exposure to publications online. Whilst work use may be under-represented by metered panels, there is also a real danger that visits to publication websites at work will not be *recalled* as they are out of the

usual context of a respondent's online readership. This is especially likely when access to the online edition is via a company intranet and therefore perhaps less likely to be recognised as a discrete online publication. Once again, careful question wording is critically important - the questions relating specifically to online readership must encourage the respondent to consider all possible reading occasions and locations.

Furthermore, it is unrealistic to expect accurate recall over long periods. In the medium's infancy, primarily driven by the need to generate larger samples of users, the accepted measure of website usage emerged as "within the past month", and this probably still represents a reasonable compromise. Occasional users will have fewer visits to remember and typically have a smaller repertoire of sites; expert and frequent users should be better able to recall their online behaviour accurately. The relevance or otherwise of the monthly definition in the context of the printed issue period is discussed below, but other things being equal, I would of course argue for the shortest possible time period over which to invite recall claims. It is important that the concept of "monthly audiences" does not become so entrenched that change becomes impossible as the medium continues to grow.

4. Title / Site Load

It is a fact of life in media research that there is always pressure to increase the number and variety of media vehicles measured in any survey. This is equally true for the measurement of exposure to websites, a situation not helped by the sheer number of sites that could potentially have some relevance to the survey subject matter.

The competitive set of online publications is much greater than printed titles, partly because it is not restricted solely to the online versions of the original print titles and partly because the internet is a truly global medium. So, for example, the online versions of national newspapers in the UK compete with major global news providers like BBC Online and CNN.com.

The pressure to include what is thought to be the full competitive set in a study inevitably leads to consideration of techniques to reduce the respondent burden by controlling the title load. The obvious solution is to include a preliminary filter to isolate which titles / websites are relevant to each respondent. However, our experimentation suggests that this can have a dramatic impact on the audience levels eventually achieved for the websites.

Since our interest is websites associated with newspapers and magazines, we took a genre that is, in theory, relatively easy to categorise – news and current affairs. We tested what effect an initial genre filter had on claims to have visited relevant websites in the last month. The table below compares recall claims with and without the following preliminary genre screener question:

"Have you visited a news or current affairs website in the last month?"

Table 2 – Sites Visited In Past Month

Website	Initial news and current affairs genre filter (n=762)	No filter applied (n=785)
	%	%
Electronic Telegraph	2	4
ft.com	4	7
Guardian Unlimited	4	5
The Mirror	1	1
The Independent	1	2
The Times / Sunday Times	3	4
Express.co.uk	*	1
ThisIsLondon / Evening Standard Online	1	1
Sunday Mirror	*	*
Megastar / Daily Star	*	1
Sunday People	*	*
The Sun	2	3
ITN	1	2
PA News Centre	1	*
Lineone / Tiscali	1	5
Cnn.com	2	3
Teletext	3	7
BBC Online	15	25
Gross total – all sites	40	73
Gross total – newspaper sites	17	29

Base: Adults 15+ who have used the internet in the past month

Source: BMRB April 2001

The data reveal on average 83% higher claims for named website usage amongst those respondents who were not asked the initial genre screening question. Respondents either do not understand the genre categorisation or they cannot relate the genre to the named websites. Either way, the initial filter depresses website usage claims very substantially. And if we analyse only those sites which are associated with print newspapers, i.e. we exclude those that could conceivably be widely used for purposes other than news and current affairs, the screening question still depresses total use significantly.

We also have evidence that progress through the initial genre screening question will be even lower if respondents are presented with a list of genres rather than being prompted for each genre individually:

Table 3 – Internet Site Genres Visited in Past Month

Genre	Prompted Individually (n=673)	Prompted within a list (n=762)
	%	%
News and current affairs	36	28
Finance or banking	37	30
Recruitment or career related sites	26	22
A site where you can get information about or buy goods, services or travel	63	56
A general interest site aimed at women (women only)	18	11

Base: Adults 15+ who have used the internet in the past month

Source: BMRB April 2001

5. Recency Period

The period over which online publication readership is measured has already been mentioned and “in the past month” currently represents the most common audience definition. Issue period is a very straightforward concept in the context of printed editions and naturally underpins the audience models employed by readership researchers. However, we have a very different situation for online editions where the content is usually evolving continually and therefore the exposure period is a much more arbitrary choice. In theory, that choice becomes simplified if we are only concerning ourselves with cross-referring off- and online exposure to advertising content since online ad space will typically be sold for fixed time periods. But different publishers will have different advertising packages and our interest may well encompass readership of non-advertising content.

Online publications are very different beasts from their printed counterparts but, for the reasons listed at the outset, we should be interested in accurately measuring their combined readership performance. There is no obvious solution, but what are the options?

- As at present, take an arbitrary period for *all* online publications (last month, last seven days, yesterday). The advantage is consistency of measurement for the online titles and therefore simplicity both for the respondent and data user.
- An alternative approach would be to define the online audience in terms of the printed issue period. Whilst this would impose a time-based consistency for comparison, the printed issue period has no real significance in the online world. Consequently, a two-tier trading currency would be likely to emerge – one to compare online publications with each other on an equal footing and another to judge them in the context of their print audiences.

So, on balance, the fixed period measurement of online audiences will probably persist. However, to minimise respondent memory error, we should be looking to reduce the period as much as possible.

6. Data Fusion and TGI.net

If one accepts my assertion that it is preferable to keep the questions regarding off- and online readership apart in a recall survey, consideration should also be given to data fusion of quite separate surveys focussing on the different formats. Whilst not true single source data, this approach of course offers the benefit of allowing each piece of research to use the optimum methodology. However, problems connected with location and title confusion and recency period may well apply to one or both of the studies.

For the TGI surveys in Great Britain and in Latin America we have taken a hybrid approach to provide much more detailed information about internet use than is possible within the standard TGI data. It is standard practice for print readership data to be collected within the main TGI study. In GB, respondents for both the TGI and our Internet Monitor study (an internet U&A which includes recall-based website use claims) are recruited from our weekly omnibus survey. Consequently, we have an overlap of respondents who have participated in both surveys and we are using data ascription to model the Internet Monitor data across the full TGI sample of internet users. For the Latin American markets we have conducted recontact studies amongst TGI Latina respondents to collect internet usage data. The “TGI.net” products in GB and Latin America therefore allow us to focus (largely) the same respondents on off- or online readership in separate questionnaires and then subsequently merge the data back together at the analysis stage.

Conclusions

The objective of this paper has been to examine some of the practical challenges associated with measuring off- and online readership within the same aided recall survey. As for all readership surveys, the researcher must consider problems associated with title confusion and respondent memory limitations. The sheer scale, complexity and fluidity of the internet means that defining website boundaries and choosing an appropriate recency period are additional concerns. There is of course no right or wrong approach, but on balance the following principles are, I believe, usefully borne in mind:

- Rather than taking a “source of copy” approach, questions about off- and online readership should be kept separate in the questionnaire – separate surveys on each topic amongst the same respondents may also be considered.
- As flagged at earlier symposia, print readership questions will need explicitly to exclude readership of online editions to minimise location confusion.
- Good research practice to minimise title confusion such as title grouping and logo prompts applies equally to online publications.
- Boundaries must be explicitly defined for online publications – for example the exclusion of non-domestic websites and other irrelevant websites within the online property.
- Questions relating to online readership must actively encourage respondents to consider all possible reading occasions and locations.
- The accepted recency period employed on the majority of surveys is one month. This period is primarily dictated by the need to generate reasonable sample sizes of site users; a shorter period would of course improve the accuracy of respondent recall.
- Genre-based screening filters significantly reduce total website use claims and should therefore be avoided if at all possible.

References

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Appendix - Table 4
Print and Online Brand Comparison

Daily Newspaper Print Title	Online Brand Name	URL
The Guardian	Guardian Unlimited	guardian.co.uk
The Times	The Times	thetimes.co.uk
The Independent	Independent.co.uk	independent.co.uk
The Financial Times	FT.com	ft.com
The Daily Telegraph	Telegraph.co.uk	telegraph.co.uk / dailytelegraph.co.uk
The Daily Express	Express Online	express.co.uk
The Daily Mail	Daily Mail.co.uk	dailymail.co.uk
The Mirror	The Mirror	mirror.co.uk
The Sun	Online Sun	thesun.co.uk
The Star	MegaStar	megastar.co.uk

Sunday Newspaper Print Title	Online Brand Name	URL
The Observer	Guardian Unlimited (Observer and Guardian are channels on each other's sites)	theobserver.co.uk
The Sunday Times	The Sunday Times (Daily and Sunday sites are connected by links)	thesundaytimes.co.uk
The Sunday Mirror	Sunday Mirror (Links between The Mirror, Sunday Mirror and Sunday People sites)	sundaymirror.co.uk
Sunday People	Sunday People (Links between The Mirror, Sunday Mirror and Sunday People sites)	people.co.uk
News of the World	News of the World (No links with Online Sun)	news-of-the-world.co.uk
Independent on Sunday	No site	
Sunday Telegraph	No site	
Express on Sunday	No site	
Mail on Sunday	No site	

Weekly Magazines Print Title	Online Brand Name	URL
Radio Times	Radio Times (Part of beeb.com)	radiotimes.co.uk
TV Times	No site	
TV Quick	No site	
Take a Break	No site	
Auto Trader	Auto Trader	autotrader.co.uk
The Big Issue	The Big Issue	bigissue.co.uk
Exchange and Mart	ixM Exchange and Mart	ixm.co.uk
Motorcycle News	MCN	motorcyclenews.com
Auto Express	Auto Express	autoexpress.co.uk
NME / New Musical Express	NME.com Express Music News	nme.com
The Economist	Economist.com	economist.com / economist.co.uk

Monthly Magazines Print Title	Online Brand Name	URL
FHM	FHM	fhm.co.uk
Cable Guide	Cable Guide	cableguide.co.uk
Reader's Digest	Reader's Digest	readersdigest.co.uk
Vogue	Vogue	vogue.co.uk
Saga Magazine	Saga Magazine	saga.co.uk
Loaded	Uploaded	loaded.co.uk
Vogue	Vogue	vogue.co.uk
BBC Gardeners World	BBC Gardeners World	gardenersworld.beeb.com
BBC Top Gear	BBC Top Gear	topgear.beeb.com
Max Power	Max Power	maxpoweronline.com
What Car?	What Car?	whatcar.com
Maxim	Maxim	maxim-magazine.co.uk

