WHAT THE WORLD NEEDS NOW

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One of the more disappointing facts in a media researcher's life is the knowledge that after so many years of relentless effort we still have not come up with the perfect solution for measuring the number of readers of a print publication. What the recent reading methodology delivers us is still not the average of the measured number of readers of the issues of a publication. 22 years of readership symposia have merely given us the certainty that what we are measuring is wrong. (Neil Shepherd-Smith, Symposium 1993). And even that conclusion cannot be taken for granted. Our main 'ambition' now is to be equally wrong for each and every publication in our surveys. How wrong are we? Over the years we have been trying to validate our readership measurements by looking at circulation figures. Though many countries now work with an Audit Bureau of Circulation (ABC), even a well-defined and independently-monitored circulation figure still leaves publishers room for manoeuvre (Jane Perry, Symposium 1995).

This failure to come up with a valid and reliable measure for Average Issue Readership has now paralysed the media research community for half a century. We are so fixated on this problem that we tend to forget it is only step two of the ARF Research Model that we are looking at! We are stuck in the dark woods of 'Vehicle Exposure'. The promised land of 'Advertising Exposure' (step three) is something we dare not even dream of. Let alone the heavens of Sales Response (step eight).

If someone has the audacity to mention 'print GRPs' it is actually 'Vehicle GRPs' we are looking at. As a consequence, in tracking research the maximum contribution of print to a mixed-media schedule seems to be a slight disturbance in the TV model. No wonder that in times of economic stagnation and declining advertising expenditures it is print that takes most of the blows.

What the print world needs now is the courage to leap the smelly gutter of recency. In spite of our inability to solve the problems of AIR, we need the audacity to take the next step, and start measuring Advertising Exposure.

This paper has three main points to make:
1. New technology enables us to measure Specific Issue Readership and thereby to improve significantly upon the common (recent reading) currency.
2. By putting both average issue readership and circulation figures on the dissecting table we can validate results in a convincing way.
3. Specific Issue Readership is the first step towards measuring the true contribution of print to a mixed media schedule.

Research design

No doubt about it, the use of Internet Access panels has brought market research into a new era. Doubtless too, in every country there is a lot of discussion about the proper use of this new market research tool. The Netherlands, along with the US and the Scandinavian countries, is one of the front-runners in 'on-line research'. No self-respecting market research company in the Netherlands is without its own Internet access panel. The published sizes of these panels sometimes peak at unbelievable heights. Internet penetration (or penetration of PCs with on-line access) in the Netherlands is said to be between 60% and 75% (at home). The Netherlands is the first country in which official print currency is being measured mainly in an on-line access pool.

The Intomart GfK Internet Access panel which we used for the study reported on here comprises 45,000 individuals aged 13 years and over. They have been recruited by Intomart GfK in telephone and face-to-face surveys. These 45,000 individuals live in 45,000 different homes. So, if necessary, as well as these individuals we can ask for the co-operation of other individuals in the same household whose sex and age are known to us.

The survey started in week 26 of 2003. Twice a week (on Monday and Thursday), a sub- sample of 800 people received an e-mail announcing the survey. At the end of the Wednesday, those parts of the two samples that had not responded were removed, so that no-one could respond to 'an old survey'.

Out of the 1600 sent out every week, the response was approximately 1000 individuals (63%). In some weeks a reminder was sent on the Tuesday, if project management was afraid of not reaching the 1000 net sample; in other weeks this was not necessary. No individual was included in more than one week-sample.

The survey was carried out over 10 consecutive weeks. Each week, a new sample of individuals aged 13 years and over was asked to complete a questionnaire on their computer. The survey was limited to 14 weekly magazines, varying from traditional women's weeklies to gossip magazines to news magazines.

The questionnaire asked respondents to select the mastheads (logos in colour) of those weekly magazines they had read or looked at in the last 12 months. (See Figure 1).

Figure 1. Screen in question

The next screen shows the last 6 consecutive covers of the magazine that was screened by means of the filter question, with the oldest cover on the left and the most recent cover on the right-hand side of the screen (See Figure 2). For each of the covers, the respondent had to state whether he/she had read the magazine within the last 7 days, less recently, not at all, or that they did not know.

Figure 2.   Specific Issue Readership
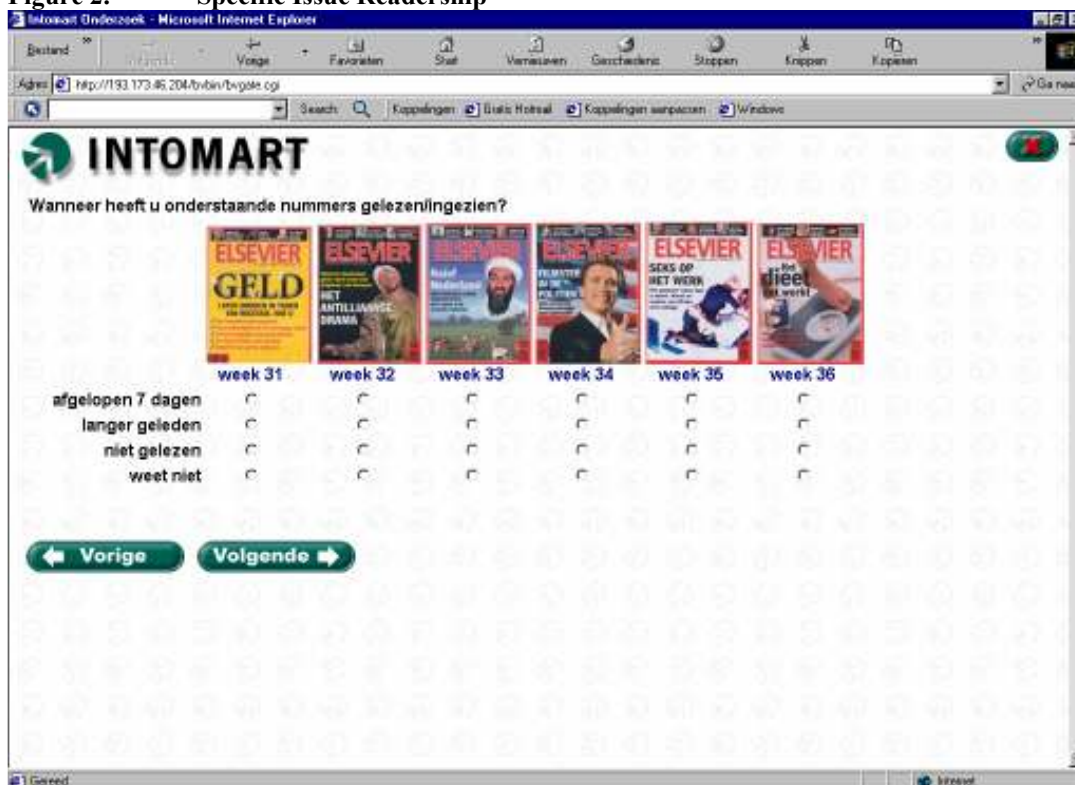
The following questions were asked only in relation to the most recent issue, which had been read no more than 7 days ago:

- Source of copy
    - subscription at home
    - news-stand purchase
    - subscription to a reading circle
    - not purchased but got hold of via:
        - neighbours, friends, relative, work, etc.
        - public transport
        - while waiting at a hairdresser
        - waiting room of hospital etc.
        - …
- Place of reading, the first time they read the magazine
    - at home
    - in the shop, or mall, or supermarket

If the copy was purchased or if there was a subscription (including reading circles), the next question was asked.

- How many members of your household could reasonably have read this copy as well, apart from yourself?

The data were enriched with the normal socio-demographics available in the Intomart on-line access pool, such as:
- sex
- age
- household size 13+
- level of education
- social class
- etc.

All issues were included in the survey from the first week of publication (update of the screens on Thursdays) until they were 6 weeks old. Unless otherwise stated, we will report here on averages over 4 different issues of all 14 magazines. Each issue has been followed through its life cycle for 6 consecutive weeks.

All respondent data are weighted by sex, age and occupation, in accordance with normal practice in media surveys.

Circulation data in the Netherlands

The circulation data are the last available figures published by HOI (The Dutch Audit Bureau of Circulation), which represents the average circulation in the second quarter.

Since 1998, (almost) all publishers of dailies and magazines have agreed to be audited by the HOI, an initiative of the Association of Advertisers, the Association of Advertising Agencies and the main publishing houses.

The circulation data (publishers' statements) are delivered per quarter and checked once a year by the publishers' external accountants. HOI is auditing these data on a regular basis. There are separate definitions for magazines and dailies. The circulation is split into 12 detailed levels for dailies and, since 2003, also into 12 levels for magazines (regular and incidental bulk was integrated). The most important magazine definitions are:

- Net Printed circulation: average printed copies in period.
- Core paid circulation
    - Paid subscriptions at standard price (= 75% or more)
    - Paid subscriptions at non-standard price (25%-75%)
    - Association subscriptions
    - Single copy sales at cover price (copies sold to the retailer at a cost price of 50% or more of the cover price). Copies returned by dealers to the publisher will be excluded

- Single copy sales at special campaign prices (copies sold to the retailer at a cost price of between 25%-50% of the cover price). Copies returned by dealers to the publisher will be excluded.

  - Reading circle: subscribers to "selection of magazines"

- Fixed Free circulation

  - Controlled circulation (to a specific target audience, a written statement from the reader is necessary).

  - Fixed free circulation (name and address of receiver known), including subscriptions < 25% of standard price and single copy sales < 25% of cover price

- Other circulation

  - Bulk sales at cover prices (bulk copies sold at a cost price of 50% or more of the recommended retail price)

  - Bulk sales at campaign prices (bulk copies sold at a cost price of 25% - 50% of the recommended retail price)

  - Outlet: free titles of more than one number to one address for the purpose of distribution to receivers (consumers). Including bulk copies at a cost price of less than 25% of the recommended retail price.

  - Occasionally remaining circulation: circulation not belonging to the other categories (circulation at exhibitions etc.)

Since HOI started auditing these data in 1998, some remarkable changes in circulation figures have occurred. Some dailies and magazines have shown dramatically lower circulation levels and/or have had to report enormous amounts of promotional used copies. After three years of existence the HOI has proven to be a solid factor in the publication of circulation figures. More than one publisher who was forced to adjust the published circulation has threatened to sue the HOI, but they never have. We can conclude that nowadays the wild-west years in circulation figures in the Netherlands are over and that the quarterly published figures are closer to reality than they have ever been.

Results

Screen-ins
Table 1 shows the percentage of screen-ins for the Intomart-GfK Specific Issue Readership survey (SIR), compared with the percentage of screen-ins of the Dutch national readership survey (NOM).

Table 1 .   Percentage of screen-ins, SIR and NOM

Title	Intomart-GfK SIR	NOM 13+	NOM Computer owners	NOM Internet access at home
Elsevier	22.7	19.0	21.1	21.8
Vrij Nederland	16.1	12.7	14.3	14.7
Libelle	47.4	53.8	55.3	55.0
Margriet	39.1	47.4	49.0	48.7
Flair	21.7	24.5	29.0	29.1
Viva	21.8	25.5	29.7	30.0
Party	14.2	22.4	25.7	25.6
Privé	44.0	56.7	60.0	59.8
Story	33.9	54.6	57.7	57.5
Vriendin	16.2	18.7	20.6	20.6
Weekend	33.9	50.5	54.0	53.9
Aktueel	25.3	37.0	42.1	43.0
Nieuwe Revu	26.3	41.1	46.4	47.0
Panorama	36.1	47.0	52.9	53.7

Even though we only measured 14 titles in our SIR survey and would therefore have expected a relatively higher number of screen-ins, the opposite occurred. With the exception of the news magazines Elsevier and Vrij Nederland, the EML method used by NOM produces screen-in levels that are 13% to 61% higher. As we used a 100% Internet Access panel and NOM uses a sample which combines 1) people with Internet access, 2) computer owners without Internet access and 3) face-to-face interviews for those who have not yet entered the computer era at all, we selected from among the NOM-survey computer-owners and those respondents with Internet access at home. This only increased the difference! This indicates a positive relationship between computer literacy and literacy as we knew it.

Our next step was to look at how the readership of a specific issue builds over time. For each issue of the titles in our survey we measured cover recognition for six consecutive weeks, starting with the first week of appearance. In the days of Through The Book (TTB) there was a fierce debate as regards the question whether or not a magazine cover is sufficient to jog a reader's memory. Evidence from several contributions in the early days of the Worldwide Readership Symposia seems to indicate that "cover recognition seems to be a reasonable instrument to establish magazine readership" (Michael Brown, Dear Reader, p. 107-108).

Figure 3 shows the build-up of readership, averaged over 4 different issues, for the news magazine Elsevier. During the first measurement week, just after the new issue appeared, 4.3% of the respondents claimed to have read this, the most recent issue, in the past seven days. 1.3% of respondents wrongly claimed to have read the new issue *before* that. After six measurement weeks there are still new readers coming in. Total reach has built up to 8.1%.

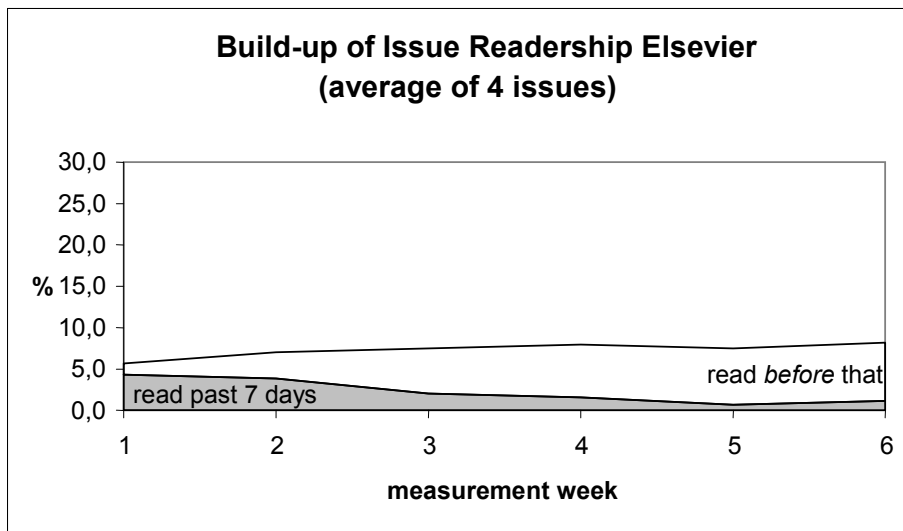**Figure 3.**   **Build-up of Issue Readership Elsevier**

Figure 4 shows similar results for Libelle, the largest women's weekly in the Netherlands. Starting with 16.1% fresh readers (and unfortunately 3.6% who claim to have read the latest issue more than seven days ago), issue readership builds up to 24.7% when the issues are six weeks old.

Figure 4.   **Build-up of Issue Readership Libelle**
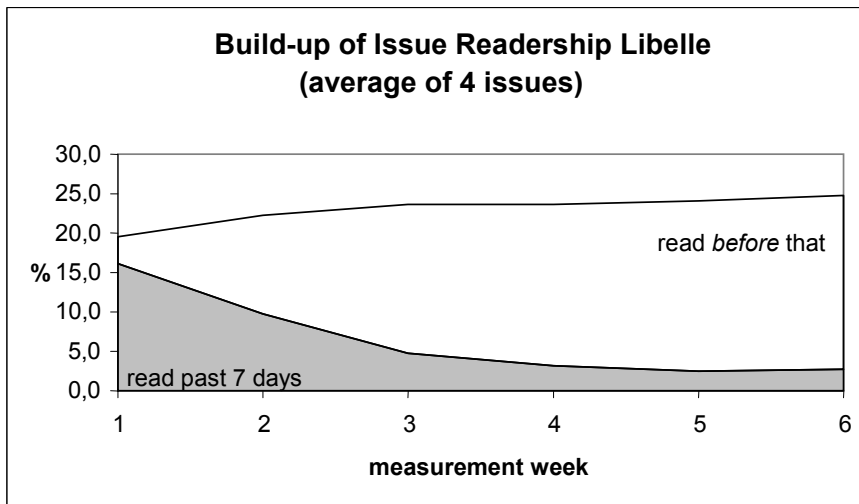
So we found relatively large numbers of false 'past reading' claims during the first measurement week, ranging from 18% to 34% of total issue readership. But, for eight of our fourteen titles, we also found that titles readership was still increasing after six weeks.

Now what happens when we look at Average Issue Readership? In the Dutch national readership survey NOM, AIR is measured with the recency method. We calculated the AIR of the magazines in our survey by averaging readership over four different issues after six weeks of measurement.
The results are given in table 2.

Table 2 .   Average Issue Readership, SIR and NOM

Title	Intomart-GfK SIR AIR after 6 weeks	NOM PC-owners	DifferenceNOM-PC/SIR Screen-ins in %	DifferenceNOM-PC/SIR AIR in %
Elsevier	8.1	4.1	7.6%	97.6%
Vrij Nederland	3.8	1.9	12.6%	100.0%
Libelle	24.7	22.7	-14.3%	8.8%
Margriet	18.6	17.5	-20.2%	6.2%
Flair	8.3	5.3	-25.2%	56.6%
Viva	7.8	6.1	-26.6%	27.9%
Party	-	-	-44.7%	-
Privé	21.4	17.3	-26.6%	23.7%
Story	14.9	15.6	-41.2%	-4.9%
Vriendin	7.1	6.0	-21.4%	18.3%
Weekend	18.3	14.7	-37.2%	24.5%
Aktueel	10.4	11.8	-39.9%	-11.9%
Nieuwe Revu	10.5	10.4	-43.3%	0.9%
Panorama	13.6	12.9	-31.8%	5.4%

Where we found less screen-ins in our SIR survey (with the exception of both news magazines), Average Issue Readership turns out to be relatively (much) higher. Apparently, seeing the covers of a magazine in front of you leads to higher readership claims. The question is, of course, which figure is (more) correct?

When we started our venture, we had the idea of using circulation figures as an independent source for validating our results. As described above, since 1998 there is an Audit Bureau of Circulation (HOI) active in the Netherlands. The HOI figures make it possible to distinguish between different sources of copy. As we can do the same for the NOM audience figures and our SIR survey, we can calculate the number of readers per copy separately for subscribers, for members of a reading circle, and for people who bought their issue at a news-stand.

By thus dissecting the relationship between readership and circulation we hope to get a better insight into the value (and validity) of our figures.

Table 3 gives the HOI circulation figures for the second quarter of 2003.

Table 3 .   Circulation figures HOI, second quarter 2003

Title	Subscriptions	News-stand	Reading Circles	Other
Elsevier	119,980	12,598	0	7,555
Vrij Nederland	36,231	11,831	0	5,874
Libelle	423,787	108,668	41,762	2,206
Margriet	231,877	96,394	40,990	1,902
Flair	24,791	98,971	7,641	1,509
Viva	37,087	76,867	11,061	1,842
Party	-	-	-	-
Privé	89,385	166,972	39,617	2,288
Story	70,104	141,253	26,418	1,262
Vriendin	20,282	88,134	28,993	1,192
Weekend	10,412	167,831	38,277	842
Aktueel	2,574	40,424	41,209	2,060
Nieuwe Revu	9,509	40,165	34,208	3,221
Panorama	19,268	57,347	41,882	1,730

When we compare these figures with the NOM AIR figures for computer owners and our SIR AIR results, this gives the number of readers per copy as shown in table 4. Since we do not know which part of the circulation is distributed amongst computer owners, we have calculated figures upon a projection of the total population.

Table 4 .   Readers per copy, NOM-PC and SIR

Title	Subscriptions		News-stand		Reading Circles		Total	
	SIR	NOM	SIR	NOM	SIR	NOM	SIR	NOM
Elsevier	2.6	1.6	12.6	5.7			7.5	3.9
Vrij Nederland	4.0	1.5	15.1	5.4			11.8	4.6
Libelle	2.0	2.2	3.5	2.3	6.8	11.9	5.1	5.2
Margriet	2.2	2.4	3.6	2.4	6.5	11.4	5.9	6.3
Flair	4.5	2.2	4.2	2.5	10.5	11.9	8.0	5.2
Viva	2.7	2.8	4.4	3.0	8.4	13.2	7.6	6.4
Party								
Privé	2.2	2.1	2.5	2.1	7.9	15.3	7.6	7.7
Story	1.2	1.9	2.1	2.2	8.6	19.5	7.1	8.7
Vriendin	3.6	3,4	3.2	2.3	5.4	7.8	6.7	5.7
Weekend	4.6	8.8	2.2	1.9	7.5	14.1	8.8	9.0
Aktueel	5.0	21.8	6.8	5.7	8.1	16.8	14.7	18.2
Nieuwe Revu	4.0	7.0	6.0	5.2	7.3	15.0	12.6	15.9
Panorama	2.5	5.3	5.3	4.6	8.6	15.1	13.1	14.3

When we look at subscriptions, then for eight out of thirteen titles SIR produces a lower number of RPC than NOM. For Weekend, Aktueel, Nieuwe Revu and Panorama there is a significant improvement in the RPC figures. However, Vrij Nederland and Flair show an opposing trend, which is not really plausible, taking into account that the average household size in the Netherlands is 2.29 persons. For issues bought at the news-stand, SIR produces higher RPC figures than NOM. A news-stand

issue is likely to be chosen for its cover, and therefore cover recognition might be relatively high. But although one might argue that copies of magazines like Elsevier and Vrij Nederland bought at the news-stand could well have a larger audience, the RPC figures we have found here require further investigation.

Conclusion

The use of Internet access panels opens up vast opportunities for improving upon current print measurement. It is relatively easy to help respondents with far better memory prompts than just mastheads or logo's. In this survey we have used magazine covers, but one might just as well provide respondents with key editorial content as well. People actually enjoy 'recognition' tasks. This calls for a re-evaluation of the 'Gold Standard', based upon some kind of Through The Book methodology. Of course we do still have sample problems when using Internet access panels. This might well be the reason for some unexplained variance in our results. But we sincerely believe this methodology will eventually be the way to look beyond Average Issue Readership and arrive at Advertising Exposure.

By looking at readership figures as well as circulation figures on the basis of 'source of copy', we have found valuable clues as to where possible errors in the data might stem from. This will definitely help media researchers in assessing the validity of our measurement systems.

And finally, though we have not been able to address the subject in so many words in this paper, the methodology used here also will have a positive impact on assessing the contribution of print in a mixed media schedule (See: Den Boon and Faasse, Specific Issue reach and Specific Issue effects, print session WAM 2003). If we do not want the print budgets to be the first to be cut in the future, we have to come up with better and convincing research in order to prove its value.