TIME OF TRANSITION: WHAT'S HAPPENING WHERE?

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Synopsis

In this paper, which takes its findings from the 2007 edition of the "Summary of Current Readership Research", the detailed compendium of print audience measurement methods currently in use around the world, we present the emerging trends and a round-up of recent developments country by country, as reported to us by the many contributors to the "Summary".

Our thanks are due to all correspondents who provided the necessary information about the 95 national readership surveys, which are included in the main part of the "Summary", and about the 60-plus other readership surveys, which deal mainly with specialist populations and are listed in a special section towards the back of the document.

Introduction

The 2007 edition of the "Summary of Current Readership Research" includes 95 total audience readership surveys from 72 countries. These 95 surveys are the surveys which aim to provide the "currency" for the buying and selling of space in the print medium in their respective countries. We tend to refer to them as national readership surveys. For 21 of the 72 countries represented in the "Summary" there are two or even more surveys listed. This can be for two distinct reasons: in some countries the surveys are divided into those providing separate "currencies", one for newspapers and one for magazines. This is for example the case in Canada, in France and in Japan. In other countries with more than one survey listed these are simply commercial rivals, as for example in Brazil, China, Croatia and New Zealand amongst others.

In the following, after a reflection about the purpose, constitution and methodological structure of a national readership survey, and a description of the changing media landscape affecting our surveys, three aspects of this year's findings are presented: the use of technology for interviewing, online interviewing and response rates. This is followed by individual country by country reports.

The Objectives and Methods of a National Readership Survey

What is the objective of a national readership survey? It aspires to be the acknowledged authority for print media audience measurement in its country. It is interesting to note that in my reckoning, only about a quarter, that is 26 out of our 95 surveys, can be classified as "JICs", joint industry committee surveys, that is surveys that are owned and controlled by media owners, agencies and advertisers in various possible configurations. For these surveys, the research agency acts as the contractor.

The majority of the 95 surveys are proprietary surveys, owned by the research agency, often part of a global research group, which sells its data to subscribers, in many cases, as indicated, in competition with another agency or a JIC survey. The JIC model is mainly a West European phenomenon, where markets are mature and competition legislation allows it. However, whatever its constitution, an important notion is that a national readership survey is expected to be fully transparent in methods employed and decisions taken.

In addition to its main function, Print audience measurement, a national readership survey can, of course, also serve marketing and editorial functions. Most surveys collect other media, marketing and profile data, but they do this to a vastly different extent, depending on demand, competitive situation and costs.

As to methods, they can differ greatly. While nearly all national readership surveys currently follow the Recent Reading model for obtaining a measure of average issue readership, within this model, the possible ways in which filter, frequency and recency questions are employed are numerous. This is fully documented in the "Summary". The two notable exceptions from the Recent Reading model are the Netherlands and Japan, where the SIR method – Specific Issue Readership - is used. As with Recent Reading, the SIR method is also open to different practices. For example, the Dutch NOM survey, which went over to the SIR method in October 2006, shows covers of six recent issues to respondents in a CASI interview administered either in the interviewer's presence or online. The Japanese magazine survey MAGASCENE, in existence since 1999, employs two covers of recent issues in a postal self-completion questionnaire.

However, within this wide variety of methods, there is agreement amongst researchers about the fundamentals: namely that no publication should be advantaged or dis-advantaged over others through a particular methodological solution. This includes not only questionnaire solutions but also sampling and analysis procedures.

We know that the Recent Reading model itself is not free of potential bias – when we refer to the model bias of Recent Reading we think of the biases introduced through "parallel" and "replicated reading" and the "telescoping" effect of memory. It is not for me to discuss this at this point. I am speaking here about the many elements which contribute to the construction of a readership survey within the Recent Reading model and which form the bulk of the details shown in the "Summary". These include the wording of the readership definition, the time reference of the filter question (or screen), whether a filter question is used at all, the stimulus used – whether mastheads or typescript, whether single or grouped titles – the form and wording of the recency or "when last" question, the form and wording of the frequency of reading question – whether verbal or numeric, the number of scale positions, whether a common scale for all publications or variable scales depending on publication group, whether the recency question comes first followed by frequency or whether it is the other way round, whether these questions are administered vis a vis the media list in a vertical or a horizontal fashion, whether publication groups are rotated and, if so, in which way and, finally, whether titles within publication groups are rotated and, if so, in which particular way.

Thus, while any one chosen element of the choices on offer for constructing a readership survey must be judged on whether it is likely to produce a bias or not, the final judgment is whether the whole of the various elements acting together produce, as far as we can know, the best possible survey in terms of accuracy, stability and absence of bias. Local circumstances, including the cost element, must be taken into account, but they should not excuse any practices which knowingly produce biased data or data which remain un-corrected for any known biases introduced by the survey design.

It occurs to me that what I have described above about the purpose, constitution and the variety of methods of a national readership survey, could have been written in 1981, when the first "Summary" was compiled for the first Readership Research Symposium, which took place in New Orleans. That "Summary" included only 24 surveys from 18 countries, but then as now, they followed with few exceptions the Recent Reading model, they were split between JIC and proprietary surveys, and they showed a similar variety of methods to obtain the average issue readership measure within the Recent Reading model. The exceptions from the Recent Reading model, as documented in that early "Summary", were the American SMRB and Starch surveys, both of which used Specific Issue Readership - SMRB with "stripped issues" for Through the Book interviewing and Starch with covers of actual magazine issues and tables of contents.

Changes and Demands

But despite the similarities, things have changed. Firstly, the number of surveys has increased – notably through additions in Eastern European, South American, Arabic and African countries. Secondly, the number of publications which a typical survey measures has increased. In 1981 the survey with the highest number of publications was the Norwegian MMI survey with 187 titles, followed by the Swiss Media Studie with 169 and the American Mediamark survey with 165 titles. The equivalent surveys to these today are the Norwegian Medieindeks with 275, the Swiss MACH with 400 and the American MRI with 253 titles. The survey closest to my heart, the British NRS, reported 105 titles in the 1981 "Summary" compared with 362 in 2007. The survey with the most publications in the current "Summary" is the China National Readership Survey (CNRS) with 642 titles.

Such proliferation of titles is one indication of the changes in the market place, which a readership survey is expected to accommodate. Regarding the problem of numbers, some surveys, in fact eleven out of 95, amongst them the British NRS, the French AEPM and the Spanish EGM, have adopted the grouped titles method as a methodological solution, a method which saves interview time (besides other benefits) compared with the single titles method. (To explain briefly, with the grouped titles method respondents receive as stimulus the mastheads of a group of titles on one card - or on a computer screen if CASI or DS-CAPI is used, while with the single titles method mastheads are presented one after the other, mostly in a card sort procedure. CASI stands for Computer Assisted Self-Interviewing and DS-CAPI stands for Double-Screen Computer Assisted Personal Interview.)

But the increase in the total numbers of publications is not the only problem for our surveys. There are also greater demographic and special target group fragmentation of the print and other media, different distribution methods and different frequencies of publication. For example, in 1981, we were mainly concerned with publications defined by the three main frequencies of publication: dailies, weeklies and monthlies, with the occasional fortnightly, bi-monthly or quarterly magazine necessitating relatively small adjustments to the questionnaire. Now we are talking about the inclusion of newspaper supplements, of three-, four-, five-, six- and seven-day dailies, of other types of irregular publications and of free in addition to paid-for titles.

Thinking of newspaper circulations, they are on the increase worldwide, except in the USA, the UK and other countries in Europe, where they are falling. Is the internet to blame? We observe that, where internet usage is relatively high, this goes hand in hand with an increasing amount of online reading. But much of the content of the internet – news, reactions and background to the news - is provided by Print. With their online presence, print media are becoming multi-platform brands and the business model of Print is changing.

Furthermore, there is a development which precedes the internet – namely multi-media planning. Advertising agencies started to look for synergies between print and broadcast media long before the internet became a third part of the potential mix. Other aspects are return on investment, engagement, affinity and quality of contact – catchwords summarising the many questions to which agencies would like to know the answers. They are looking to research.

Our national readership surveys, designed basically to provide audience measurement of traditional print media, try to adapt and answer some of these questions as best as they can by adding appropriate new measures to the questionnaire. However, this will be increasingly difficult to do as questionnaire structure and other survey aspects are put to their limits. But I believe that for most of the current demands on our surveys there are methodological solutions – some concerning the questionnaire, some a possible re-definition of average issue readership, others sample design and stratification and still others the integration of special separate surveys into the main readership surveys. Indeed, such solutions are already practised. For me, one of the most notable developments in this regard is the use of technology, as discussed below.

The Increasing Use of Technology

The great majority of our national readership surveys (72 out of 95) conduct their interviews personally, face-to face, mainly with a pen and paper questionnaire. Seven use the telephone with CATI (Computer Assisted Telephone interview, and twelve use a pen and paper self-completion method. Four surveys use different methods either by different publication groups or by different geo-graphical areas. First, let me list the CATI, self-completion and mixed method surveys.

The seven CATI surveys are the following:

Canada-NADbank (newspapers)
Croatia-MEDIApuls
Denmark-Index Danmark Gallup
Finland-KMT
France-EPIQ (newspapers)
Portugal-Bareme-Impresa
Switzerland-MACH Basic

The twelve pen and paper self-completion surveys are:

Croatia-TGI
Indonesia-Roy Morgan
Ireland-TGI
Israel-TGI
Japan-J-Read (newspapers)
Japan-Magascene (magazines)
New Zealand-Roy Morgan
Serbia-TGI
Sweden-Orvesto Consumer
UK-TGI
UK-Roy Morgan
USA-Roy Morgan

The four surveys using different methods by either publication group or geography are:

Norway-Forbruker & Media (telephone for newspapers/self-completion for magazines)
Norway-Norsk Medieindeks (personal national media/self-completion regional media)
Russia-NRS (telephone Moscow and St Petersburg/personal elsewhere)
Ukraine-NRS (telephone 12 major cities/personal elsewhere)

Now, I say above of the personal interview surveys that they are “mainly” conducted with a pen and paper questionnaire. But I also include under “personal” those surveys which use CAPI (Computer Assisted Personal Interview), DS-CAPI (Double-Screen CAPI) and CASI (Computer Assisted Self-Interview). However, there is an increasing difficulty in arriving at a relatively simple classification by method of interview. This is because there is a trend towards mixed methods, not for different publication groups or for different geographical regions, as mentioned above, but for other reasons, including maximising response and the search for greater efficiency. For some surveys, the pen and paper or CAPI questionnaire is used in combination with a CASI or a self-completion interview, as in Germany or the UK, or the CASI personal interview is used in combination with a CASI online interview, as in the Netherlands. For the time being, I count these surveys as personal interview surveys.

The increasing use of technology for the interview is illustrated by the fact that 15 surveys included under “personal” now use either CAPI, DS-CAPI or CASI, compared with ten in the last “Summary” of 2005.

The current eight CAPI surveys are:

Czech Republic-Media Project (new method since Symposium 2005)
Ecuador-ENL (new method since Symposium 2005)
Greece-Bari
Hungary-Media Analysis
Poland-PBC (new method since Symposium 2005)
Slovenia-NRS
South Africa-AMPS
Spain-EGM

The current four DS-CAPI surveys are:

Belgium-CIM
France-AEPM
Italy-Audipress (new method since Symposium 2005)
UK-NRS (with pen and paper self-completion in selected areas to boost response rates)

The current three CASI surveys are:

Austria-MA (in presence of interviewer/new method since Symposium 2005)
Germany-ma (30% CASI in presence of interviewer, 70% pen and paper)
Netherlands-NOM (all interviews CASI, 60% online, 40% in presence of interviewer)

The interesting point of difference between the use of CASI in Germany and the Netherlands is that, while the Dutch survey uses the same questionnaire method and combines two different samples, the Germans combine two different questionnaire methods. However, as we have seen in the 2005 Symposium paper by Eva-Maria Hess and Gabriele Ritter, which charted AG.MA's CASI development over the previous ten years, the German objective was to arrive at a CASI questionnaire which in the end satisfied the need for comparability with pen and paper to a remarkable extent.

All three methods, CAPI, DS-CAPI and CASI are great improvements compared with the pen and paper method. They allow much greater flexibility in questionnaire design and offer greater control of the interview. They enhance the quality of data collection greatly. While CAPI mastheads and other show material still tend to be produced as for a pen and paper questionnaire, with DS-CAPI, mastheads and show cards are on a separate small computer screen held by – or put in front of – the respondent. The interviewer's laptop and the respondent's screen are connected through a wireless link and are programmed for the right mastheads and show cards to come up on the respondent's screen at the appropriate questions. And with CASI, all mastheads and show material are on the respondent's screen together with the appropriate questions, for self-completion.

Compared with CAPI, both DS-CAPI and CASI ensure even better control of the interview and even greater flexibility in questionnaire design. Mastheads can be shown at any readership question, filtered as appropriate. For example, I am thinking here especially about the difficulty of controlling questions about newspaper supplements. As you will appreciate, these are extremely difficult to administer with pen and paper and still awkward with CAPI, but are less of a problem with DS-CAPI or CASI.

Online Interviewing

As we have noted, the Dutch NOM Print Monitor is the only national readership survey currently using an online sample for the majority of its nearly 25,000 interviews per year. In Prague in 2005, we heard a surprise announcement about the British NRS, to the effect that it was proposed that the NRS would stop random sampling and draw monthly quota samples from a large internet access panel. That proposal has not come to fruition. Investigations about its feasibility continue.

What is the situation in other countries? In addition to general questions about recent developments concerning readership research, I asked my "Summary" correspondents specific questions about the internet, as follows: "Did your organisation, or any other you are aware of in your country, conduct or experiment with Print surveys using the internet? Were these for audience measurement or other types of Print surveys?"

From most countries the replies were negative. But 19 survey correspondents answered positively. The types of surveys reported to be conducted using online samples were mostly proprietary studies on behalf of individual media including reader profiles, editorial development and advertising effectiveness surveys. These types of surveys were reported from China (both CTR Market Research and Sinomonitor), Denmark, Finland, Hungary, Japan, Korea, Slovenia, Switzerland and the UK.

However, from eleven countries there were reports about studies or experiments or plans concerning Print audience measurement. These are listed below. The reports from the Netherlands, Sweden and the USA will be followed by detailed presentations in this year's Symposium.

Canada-NADbank. A parallel online readership study was conducted in Toronto in 2006.

Denmark-Index Danmark/Gallup. Trials have taken place using the internet for audience measurement both alone and in combination with CATI. Online only studies produced very different results to the current NRS.

Finland-KMT. The Atlas Decisionmakers media survey, conducted by TNS Gallup Oy, uses the internet only. Taloustutkimus Oy conducts the Koodi survey using alternatively postal and online methods.

Italy-Audipress. A technical committee is working on this project.

Netherlands-NOM. The NOM Print Monitor has been carried out using the internet with an online CASI questionnaire since 2002. It is combined with the face-to-face interview, also using CASI.

Norway-Forbruker & Media. A new CAWI (Computer Assisted Web Interview) survey has been established by TNS Gallup called Media Barn 2007. It is a multi-media survey including readership amongst children aged 3-13. In Norway, 95% of children aged 3-13 have access to the internet at home.

Puerto Rico-TGI. Measurement studies of electronic editions of daily newspapers and studies amongst internet users about internet behaviour including media websites are reported from this country.

Russia-NRS. A test using the internet for audience measurement of print is scheduled for September-November 2007.

Spain-EGM. AIMC, the joint industry committee in Spain, carried out a test using internet interviewing in January 2007 with 3,302 ompleted interviews. The sample was drawn from an access pool. It measured print and radio amongst the internet population, which is around 40% of the total population aged 14+. The interview length was 30 minutes; an incentive of 5 Euros was given. At less than 30%, the response rate was lower than expected. Readership varied significantly in comparison with personal interviewing.

Sweden-Orvesto Consumer. Both the Mediapuls 2.0 study and the QRS (Quality of Reading Survey) are conducted using the internet.

USA-MRI. The new Specific Issue Study conducted by Mediamark, a companion study to its National Study, is conducted over the internet, using weekly national random samples drawn from an access pool/internet panel.

Response Rate Trends

As in previous years, I have asked my "Summary" correspondents to tell us their surveys' response rates of the last two years. This time, I received replies from 43 surveys, compared with 36 in 2005 and 29 in 2003. 24 surveys responded both in 2005 and 2007, 12 did not respond again and 19 responded for the first time in 2007. I was not given any reasons for non-response to my request, amongst those who responded last time but not now. However, these surveys seem to cover the whole range of response rates. It seems to be a case of random non-response.

As pointed out before, international comparisons of survey response rates are not possible in terms of the absolutes of the figures reported. The underlying response rate calculations of the figures reported do not seem to follow the same method, and in certain cases I have the suspicion that the rates reported are not representing the overall response rates, which we know must take all the separate stages of contacting and interviewing into account, not only the last stage. However, the findings are still of value: they show us the range of response rates in existence around the world, and they demonstrate the trend.

Based on the 43 surveys that reported their response rates for this year's "Summary", the results are shown in the following table. They relate to the year 2006. The table shows the ranges of response rates in total and by method of interview. As may be seen, half of the 43 surveys – namely 22 - reported relatively low response rates of under 50% for 2006. Of these, ten reported rates of under 40%.

Table 1. Response Rate Ranges by Method of Interview

Response Rate as reported	Total Number of Surveys	Personal	Telephone	Self-Comp.
90%+	1	1	-	-
80%-89%	4	2	-	2
70%-79%	3	3	-	-
60%-69%	5	4	-	1
50%-59%	8	6	1	1
40%-49%	12	7	2	3
Under 40%	10	10	-	-
Total	**43**	**33**	**3**	**7**

Base: 43 surveys reporting their 2006 response rates for 2007 "Summary"

As to response rate trends, the declining trend is continuing. Firstly, we note that of the 43 surveys which replied to my request, 17 surveys reported lower response rates for 2006 than for 2005, while another 17 showed equal response rates between the two years or, in a few cases, higher response rates in the second year. (Nine surveys did report the figures of one single year only.)

Secondly, there is a clear trend over the last four years. For this analysis we look at the results amongst the 24 surveys which reported response rates for both this and last time's "Summary". Because of that, we have figures relating to the last four years based on the same surveys. As may be seen from the table below, the number of surveys in the bottom ranges is increasing. For example, while 13 surveys amongst these 24 reported response rates of under 60% in 2003, this increased to 18 surveys in 2006. Of these, six surveys reported response rates of under 50% in 2003. This increased to eleven in 2006.

Table 2. Response Rate Trends Over Four Years

Response Rate as reported	No. of Surveys 2003	No. of Surveys 2004	No. of Surveys 2005	No. of Surveys 2006
90%+	-	1	1	1
80%-89%	2	2	1	1
70%-79%	1	1	2	2
60%-69%	6	4	2	2
50%-59%	7	6	7	7
40%-49%	4	6	6	6
Under 40%	2	3	4	5
n.a.	2	1	1	-
Total	**24**	**24**	**24**	**24**

Base: 24 surveys reporting their response rates for both the 2005 and 2007 "Summaries"

Recent Developments Around the World

Apart from online use dealt with above, our "Summary" contributors reported the following recent developments from their countries regarding readership research.

Australia-Roy Morgan. The Roy Morgan survey in Australia now measures day by day online and hard copy reading of major newspapers. It also commenced measuring "items received in your mailbox", newspaper involvement, topics/sections of newspapers by the amount of interest in reading, and it added the participation in, and consumption of, "new" media – i.e. downloading of music/television/movies, streaming radio/video, weblog reading/commenting/creating, involvement with social networking websites etc.

Austria-MA. Since MA 2005, the Austrian Media Analyse is using CAPI/CASI at home addresses instead of pen and paper.

Belgium-CIM. For the 2007/08 survey, the Belgian CIM survey added the measurement of magazines published every two months.

Brazil-EGM. To provide more analysis possibilities, the Galileo software is used for data analysis – for example macro segmentation of magazine and newspaper titles.

China-CNRS. The CNRS has increased its proportion of high-class residential communities within the sample, to ensure sufficient coverage of "premium people". We are told that the same company, which conducts the survey, CTR, also conducts syndicated media and product studies amongst specific segments of the population. These include the China Business Executive Survey (since 2004), China University Students Survey (since 2006), China Teenager Survey (since 2006) and China Top Lady Survey (since 2007).

China-CMMS. The company conducting the CMMS, Sinomonitor International, also conducts new readership surveys amongst specific target groups. They include H3-New-Rich, China Undergraduates and Tweens. For these surveys, new methods of contacting and interviewing are developed, such as online, CAPI, appointment making for face-to face, and self-completion. My correspondent adds that new media typologies bring new challenges regarding definitions and measurement methods.

Costa Rica-EGM. The EGM survey of Costa Rica is reported to have been found an excellent tool to evaluate new newspapers.

Croatia-MEDIApuls. Recent developments in Croatia are that marketing agencies and publishers use projects such as BRANDpuls and TGI that link readership data with other data – products, brands, lifestyle. This extends media planning from socio-demographic target groups to other relevant groups.

Czech Republic-Media Project. The methodology of the Czech Media Project has changed in 2006. It is now conducted using CAPI. Logos are shown to respondents and the interview is simplified with a maximum of two questions per title. Recency is asked of all titles. The order of publications depends on the socio-demographic characteristics of respondents – our correspondent says that this is according to the GfK methodology, one of the two contractors of the JIC survey, the other is Median.

Denmark-Index Danmark/Gallup. From Denmark we hear that the free sheet market has exploded. There were three national free titles in early 2007, but one of them has since closed. This has changed the way in which monthly results are calculated and given rise to new reporting tools, according to our correspondent.

Finland-KMT. The Finnish NRS, KMT, a joint industry survey, has changed contractor. Following Taloustutkimus Oy the new contractor is TNS Gallup Oy. Our correspondent reports that Finnish publishers are interested in total reach of print and web. How to measure this is in development.

Greece-Bari. In April 2007, the Greek Bari/National Readership Survey, conducted by Focus, launched its first results based on CAPI for the media section and on CATI for marketing data.

Hong Kong-Nielsen Media Index. The Media Index of Hong Kong has additional questions regarding Media Engagement and it added Total Audience Measurement.

Hungary-Media Analysis. We are told that in Hungary, since 2005, household purchase data (FMCG) are fused into the databases of the Media Analysis survey.

Indonesia-Nielsen Media Index. Our correspondent representing the Media Index of Indonesia tells us that the coverage of the national survey in 2005 extended to 93% of the Indonesian population aged 10 and over. The up-market survey conducted in 2006 covered two cities, Jakarta and Surabaya.

Ireland-JNRS. Two recent developments are reported from Ireland. Firstly, in 2006, the sampling method of the Joint National Readership Survey moved from using the Electoral Register to using the Geo Directory. The shortcomings and flaws of the Electoral Register had been subject to extensive media coverage. Furthermore, Irish data protection legislation imposed restrictions on accessing the names of Electors on the Register. Secondly, newspaper magazines, that is stitched and trimmed magazines published with daily and Sunday newspapers, were measured for the first time on the JNRS.

Italy-Audipress. Since Autumn 2005, the Italian Audipress survey uses DS-CAPI for the personal interview, with logos reproduced in colour.

Japan-J-READ and MAGASCENE. Our Japanese correspondent thinks that the newspaper survey J-Read, in existence since 2002, and the magazine survey Magascene, in existence since 1999, both conducted by Video Research Ltd., are more suitable surveys for the “Summary” than the same company’s ACR survey. We agree and have followed the advice.

Kenya-AMPS. There is lots of activity in Kenya, according to our correspondent. The media landscape has changed drastically with new radio and TV stations being launched and a continuous growth of print and outdoor. The media fraternity including media owners, advertisers and agencies formed a technical committee, which appointed the Steadman Group to be the exclusive supplier of audience research information in Kenya. Amongst many other comments, too many to be reported here, our correspondent makes the interesting observation that environmental concerns are becoming an issue regarding print, with less pulp available to print companies as trees are not growing as fast as the population. The net result of this, says our correspondent, will be an increasing shift to online readership, that would also be subscriber based.

Kuwait-NMA. No specific developments are reported from Kuwait except that more and more publications have been launched.

Lebanon-NMA. The news from Lebanon is that more and more publications have been launched. Regarding the relatively low response rates of the Lebanese survey, our correspondent mentions that this can be attributed to the war-like situation in the country, which discouraged people from entertaining unknown people visiting them.

Netherlands-NOM Print Monitor. Significant developments took place in the Netherlands. Specific Issue Readership (SIR) was extensively tested in 2005 and 2006 including full scale test runs to validate SIR as an alternative method for measuring readership. Following this, in October 2006 a new national readership survey was launched with SIR instead of Recent Reading for measuring average issue readership. At the same time, the sampling method was changed. It remains a mixed method, but now the random probability sample is the basis, which is combined with the sample obtained from an internet access pool. Intomart GfK was commissioned for three yars to conduct the NOM Print Monitor and the NOM Doelgroep Monitor, a single source consumer survey.

Norway-Forbruker & Media. From Norway, concerning the Consumer and Media survey, conducted by TNS Gallup, an extended local TGI with 19,910 interviews is being reported. Regarding newspapers, our Norwegian correspondent says that since September 2005 there is more frequent and detailed reporting of readership figures covering weekdays and seasons. The survey also measures more supplements. Measurement of local radio, internet and mobile content are all integrated with the survey – while for national radio stations PPM (Personal People Meter) is the “currency”.

Norway-Norsk Medieindeks. The company conducting the Norsk Medieindeks is Synovate MMI. Our correspondent representing the survey reports that his company has investigated the relationship between magazine readers and word of mouth/opinion leaders. They have found that opinion leaders are more likely to use magazines to update themselves. With one of the larger magazine publishers, they also have conducted a big qualitative and quantitative study.

Philippines-Nielsen Media Index. In 2006, the Philippines Media Index moved to twice yearly reporting instead of annual. The half-yearly sample is boosted from 2,000 to 2,550 to reach niche audiences and key cities better, so that key geographic and metropolitan areas can be separately analysed.

Poland-PBC. In 2006, the Polish national readership survey changed from using pen and paper to using CAPI.

Puerto Rico-TGI. Three points are made by our correspondent representing the Puerto Rico survey. Firstly, that Ernst & Young have completed annual audits, with accreditation pending. Secondly, that the survey provides additional information regarding readership of electronic editions of daily newspapers. Thirdly, that increased respondent and interviewer compensation has brought positive results in terms of response rates and in-tab levels, in total, by region and socio-economic strata.

Romania-NRS. During the last two years, the Romanian NRS has added a new part dealing with products, services, brands, lifestyle etc. At the same time, the universe has been increased to cover all urban areas.

Singapore-Nielsen Media Index. From Singapore we hear that the Media Index now includes a booster sample of professionals and managers.

Slovak Republic-TGI. Regarding the Slovakian TGI, our correspondent reports that the 2007 sample will be increased to 8,000, that the filter for dailies will be past 14 days, to bring the number of qualifying issues in line with other publications, and that a yesterday code had been added to the recency question regarding supplements.

Slovenia-NRS. With a new contract period 2006 to 2008 the method of the Slovenian NRS, a JIC survey, changed. Instead of a dual model combining telephone with face to face interviews, the new survey is conducted solely face to face. The company with the name CATI, the previous contractor, won the new contract too. The company is now called VALICON. Because of the sample change, the new data were not comparable with the old survey's data. To improve reliability, 12 months data are now the currency, instead of six months data, though there is still half-yearly reporting.

South Africa-AMPS. Two points are mentioned. Firstly, in 2007, SAARF, the South African Advertising Research Foundation, commissioned an independent international expert to audit the AMPS survey. It received a stamp of approval. Secondly, there will be additional interviews in urban areas between July and December 2007 to boost the sample size.

Spain-EGM. Interesting news comes from the organisers of the Spanish EGM. As from 2006, there is a sample extension to measure only newspapers, not magazines, using CATI telephone interviewing with 32,000 respondents per year. The method involves no visual stimulus and no title prompting. The 32,000 CATI interviews are combined with the 43,000 personal EGM interviews to provide newspaper readership estimates based on the total of 75,000 interviews. For the majority of newspaper titles, the results are reported to be fairly equal between the two samples, with the exception of economic and financial papers. For these types of newspapers, the CATI sample provides significantly higher figures.

Sweden-Orvesto Consumer. A very strong multimedia development is reported from Sweden. This includes the addition of direct mail to the Orvesto Consumer survey in addition to television, radio, internet and cinema. Outdoor is also in the process of being integrated. A QRS survey has been launched, covering about 300 consumer and business-to-business titles, which too is integrated into the Orvesto Consumer survey. Furthermore, there is the new Mediapuls 2.0 survey integrating mixed methods as well as circulation data, with large samples, fast reporting and connection to advertising effectiveness studies. Internet data are released using a cookie based research technique whereby respondents to the Orvesto Consumer survey are followed out into the web, thus allowing single source media planning. Concerning a methodological detail, a seven-day diary, sent out previously to 50% of respondents, has been replaced by a one-day diary, completed by all respondents. This is expanded into a seven-day diary database and can be used for reach and cume calculations using the Sesame software.

Switzerland- MACH. The MACH Research System, as the Swiss now call their integrated surveys, will include a third survey, MACH Radar as from October 2007. MACH Radar will provide psychographic information in addition to MACH Basic, which provides the Swiss readership currency, and MACH Consumer, which delivers consumption and product usage information. Looking to the future, our correspondent reports that they started conceptual work for a new generation of the MACH Research System, which is planned to be operational by 2011 or 2012. The new system should address current methodological challenges and the new needs of media owners and planners.

Taiwan-Nielsen Media Index. The Taiwanese survey now includes quality of reading questions.

Tanzania-AMPS. Our correspondent reports that there is growth in the print and radio sectors of the Tanzanian media landscape. Radio has a considerable share of advertising revenue alongside TV, while print has seen a drop. "Media Owners of Tanzania" (MOAT) have been at the forefront of ensuring that the media research conducted in the country is of the highest standards possible, according to our correspondent.

Thailand-Nielsen Media Index. From Thailand we hear of booster samples amongst upper income groups, and of increased frequency of data delivery, from two to four times per year.

Turkey-BIAK/NRS. The sample of the Turkish survey has been drawn from a greater number of provinces and districts than before. Accordingly, the universe has increased from 30,719,000 to 47,276,000.

Uganda-AMPS. Our correspondent reports that radio accounts for over 60% of advertising revenue in Uganda, with over 120 licensed radio stations in this country. But it is Print which has seen a growth in titles. Media stakeholders are active in ensuring that a competitive professional culture is promoted using evidenced based research for making business decisions.

United Arab Emirates-NMA. The UAE has seen a media boom with many new publications being introduced, according to our correspondent. Weeklies and monthlies have gone niche and there are specific publications catering for specific areas of interest.

UK-NRS. Three major developments are reported concerning the British NRS. Firstly, since September 2006, there are respondent incentives in London (£25 gift voucher or donation to charity). Secondly, during 2006, the London self-completion option has been extended to South East and East Anglia. This includes postal questionnaires for those who have not completed either the DS-CAPI interview or the leave-behind self-completion. Thirdly, there is a self-completion questionnaire at the end of the DS-CAPI interview amongst those who claimed to have accessed the internet in the past twelve months, dealing with 66 publisher websites (this includes newspaper and magazine sites). The questions include visiting the site in the past twelve months and when last visited. The objective is to provide a measure of combined print and web reach.

UK-Roy Morgan. The British Roy Morgan survey includes day-by-day online and hard copy reading of major newspapers. There is also a new measure "Items received in your mailbox".

USA-MRI. Mediamark began fielding an Issue Specific Study as a companion study to their MRI national study. It is not intended to replace the national study as the audience currency. Its primary objective is the measurement of audience variability from issue to issue. The Issue Specific Study is conducted over the internet, using a panel sample. Respondents are shown the most recent covers of titles they have identified as having read or looked into in the last six months. There are eight covers of weeklies and bi-weeklies, and four covers of tri-weeklies, monthlies and bi-monthlies. They are asked to select the covers of the issues they have read or looked into. From the results, MRI establishes an index for each issue, representing the performance of that given issue in respect of other issues of that title. Multiplying the index and the average issue audience from the MRI national study produces the issue audience for each issue, in total and by male and female adults.

USA-Roy Morgan. The American Roy Morgan survey includes day-by-day online and hard copy reading of major newspapers. There is also a new measure "Items received in your mailbox".

Conclusion

From the above, I conclude that print audience measurement is in a period of transition. How to respond to the new demands is the question on the mind of nearly everybody involved in readership research. As has been seen, some survey providers have implemented new and striking solutions and others are actively pursuing new ideas. However, a great many, I feel, remain for the time being in a "wait and see" situation. There seems, as yet, no agreed model in general use to measure regular readership in print and online simultaneously.

Appendix Table: Response Rates as Reported*

Survey	Method of Interview**	2005	2006
Austria-MA	Personal	80.2%	80.2%
Bahrain-NMA	Personal	Approx. 45%	Approx. 45%
Belgium-CIM	Personal	24%	25%
Canada-PMB	Personal	65%	65%
CanadaNADbank	Telephone	47%	45%
China-CNRS	Personal	35.2%	31.7%
China-CMMS	Personal	14%	14%
Czech. Rep.-MP	Personal	56.4%	48%
Egypt-NMA	Personal	-	70%
Greece-Bari	Personal	38.6%	38.7%
Hungary-MA	Personal	40%	40%
Indonesia-Index	Personal	90%	93%
Ireland-JNRS	Personal	72%	70%
Ireland-TGI	Self-Comp.	42%	39%
Israel-TGI	Self-Comp.	Approx. 40%	Approx. 40%
Japan-J-Read	Self-Comp.	85.2%	84.9%
Japan-Magascene	Self-Comp.	81.2%	81.5%
Jordan-NMA	Personal	28-30%	-
Kuwait-NMA	Personal	-	54%
Lebanon-NMA	Personal	-	22%
NetherlandsNOM	Personal/Online	Pers.17%/Online70%	Pers.17%/Online63%
Norway-F&M	Tel./SC	Tel. 51%/SC 32%	Tel. 50%/SC 32%
Oman-NMA	Personal	-	42%
Philippines-Index	Personal	-	35.5%
Poland-PBC	Personal	-	43%
Puerto Rico-TGI	Personal	58.5%	58.5%
Qatar-NMA	Personal	-	35%
Romania-NRS	Personal	72%	70%
Russia-NRS	Telephone/Pers.	48%	47%
SaudiArabiaNMA	Personal	-	45%
Serbia-TGI	Self-Comp.	71%	68%
Singapore-Index	Personal	52%	55%
Slovak Rep.-TGI	Personal	84.2%	81.7%
Slovenia-NRS	Personal	55%	54%
Slovenia-TGI	Self-Comp.	52.5%	49.8%
SouthAfricaAMPS	Personal	67.5%	65.8%
Sweden-Orvesto	Self-Comp.	49%	44%
Syria-NMA	Personal	-	40%
Thailand-Index	Personal	60%	60%
Turkey-NRS	Personal	52%	51%
UAE-NMA	Personal	-	45%
UK-NRS	Personal	49.4%	51.5%
USA-MRI	Personal	Spring64.4%/Fall63.7%	Spring61.1%/Fall60.0%

Base: 43 surveys reporting their response rates for the 2007 "Summary"
* Response rates for the readership part of the survey
** Method of interview of the readership part of the survey