A global review of print readership surveys

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See Page 23: 4. Fairness of Research Method between different classes of publication (e.g. dailies, weeklies, monthlies) - 78% of Australian media buyers agree for Roy Morgan readership estimates, higher result than for any other country.
Research summary

• ‘Fieldwork’: March-May 2004

• Satisfaction with 20 issues asked on five-point scale

• 61 surveys

• 41 countries
  – 3 countries with 13+ responses
  – 6 countries with 5+ responses

• 166 completed questionnaires
  – 141 agencies
  – 25 publishers
Users of print research readerships surveys are, in general, **satisfied** with the product and service they receive.
Key factors driving satisfaction included survey transparency, availability of software and geographical coverage.
Dissatisfaction was registered in areas like failure to measure all sources of readership, lack of qualitative information and the ability to access raw data.
6% of answers fell into the ‘non-response’ or ‘don’t know’ category overall – a little startling from a sample of media research decision-makers!
Global summary: ‘non-response’/‘don’t know’

- Ability to access respondent-level data: 10%
- Acceptability of subscription method: 11%
- Final response rates achieved: 13%
- Measurement of all reader sources: 16%
- Fairness of prices paid by different industry players: 21%
### Number of surveys by region/type

<table>
<thead>
<tr>
<th>Region</th>
<th>JIC</th>
<th>MOC</th>
<th>Subscription</th>
<th>TRCC</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>0</td>
<td>1</td>
<td>9</td>
<td>1</td>
</tr>
<tr>
<td>Latin America</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Europe</td>
<td>10</td>
<td>5</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>APAC</td>
<td>1</td>
<td>0</td>
<td>16</td>
<td>0</td>
</tr>
</tbody>
</table>
Number of surveys by supplier*

<table>
<thead>
<tr>
<th>(3%)</th>
<th>(5%)</th>
<th>(2%)</th>
<th>‘Others’ (36%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>China (part)</td>
<td>Belgium</td>
<td>Australia</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>India</td>
<td>Denmark</td>
<td>Austria (2)</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Ireland</td>
<td>Lithuania</td>
<td>Canada (2)</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Mexico</td>
<td>Norway</td>
<td>Colombia</td>
</tr>
<tr>
<td>Philippines</td>
<td>Poland</td>
<td>Russia</td>
<td>Czech Rep.</td>
</tr>
<tr>
<td>Singapore</td>
<td>Sweden</td>
<td>Turkey</td>
<td>France</td>
</tr>
<tr>
<td>Taiwan</td>
<td>UK</td>
<td>Vietnam</td>
<td>Germany</td>
</tr>
<tr>
<td>USA</td>
<td>USA</td>
<td></td>
<td>Greece (2)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(0%)</td>
<td>(46%)</td>
<td>(1%)</td>
<td>(7%)</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>USA (2)</td>
<td>Argentina</td>
<td>Hungary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Peru</td>
<td>Chile</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>UK</td>
</tr>
</tbody>
</table>

*Market share weighted by total adspend
Peter Menneer’s ‘health warning’

“The results of this exercise are critically dependent on the specific countries chosen…and the success in obtaining co-operation from these individuals”
Global summary: performance criteria (1)

- Geographical coverage: 89%
- Availability of software: 83%
- Transparency of methodology: 77%
- Fairness of method between different classes of publication: 75%
- Response rates: 74%
- All commercially significant publications measured: 74%
- Reliability and consistency of results: 73%
### Global summary: performance criteria (2)

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptability of subscription method</td>
<td>71%</td>
</tr>
<tr>
<td>Fairness of prices paid by agencies vs. publishers</td>
<td>68%</td>
</tr>
<tr>
<td>Sufficient sample size</td>
<td>67%</td>
</tr>
<tr>
<td>Acceptability of price paid for value received</td>
<td>67%</td>
</tr>
<tr>
<td>Timeliness of service</td>
<td>67%</td>
</tr>
<tr>
<td>Responsiveness of vendor to customer queries and comments</td>
<td>66%</td>
</tr>
<tr>
<td>Effectiveness of industry consultation procedures</td>
<td>62%</td>
</tr>
</tbody>
</table>
Global summary: performance criteria (3)

- Ability to access raw data for own analysis: 57%
- Ability to adapt and change according to the marketplace: 56%
- Willingness to experiment with new approaches and report back to the industry: 53%
- Availability and usefulness of qualitative data: 48%
- Measurement of all reader sources of a publication: 44%
Overall satisfaction ratings:

Print Readership surveys: 69%
Source: Andrew Green, WAM 2004

TV Peoplemeter surveys: 68%
Source: Peter Menneer, WAM 2003
Drilldowns: Six key issues
Six key issues

1. Measurement of all reader sources of a publication
### 1. Measurement of all reader sources

<table>
<thead>
<tr>
<th>Category</th>
<th>North America</th>
<th>Europe</th>
<th>APAC</th>
<th>Latam</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agencies</td>
<td>43%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publishers</td>
<td>48%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subs</td>
<td>48%</td>
<td>36%</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>JICs</td>
<td>40%</td>
<td>40%</td>
<td></td>
<td>40%</td>
</tr>
<tr>
<td>VNU</td>
<td>49%</td>
<td>57%</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Kantar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOP (MRI)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Six key issues

1. Measurement of all reader sources of a publication

2. Sufficient sample size to meet marketplace needs (including measurement of key niche titles)
2. Sufficient sample size

- Agencies: 68% 63%
- Publishers: 63%

- N. America: 62%
- Europe: 71%
- APAC: 65%
- Latam: 57%

- Subscription: 63%
- JICs: 72%
- Others: 77%

- VNU: 67%
- Kantar: 68%
- NOP (MRI): 80%
- Others: 67%
Six key issues

1. Measurement of all reader sources of a publication
2. Sufficient sample size to meet marketplace needs (including measurement of key niche titles)
3. Acceptability of subscription price level for your company versus value received
3. Acceptability of subscription price level

- **Agencies**
  - 69%
- **Publishers**
  - 60%

- **N. America**
  - 69%
- **Europe**
  - 73%
- **APAC**
  - 55%
- **Latam**
  - 67%

- **Subscription**
  - 60%
- **JICs**
  - 74%
- **Others**
  - 87%

- **VNU**
  - 55%
- **Kantar**
  - 67%
- **NOP (MRI)**
  - 63%
- **Others**
  - 71%
Six key issues

1. Measurement of all reader sources of a publication
2. Sufficient sample size to meet marketplace needs (including measurement of key niche titles)
3. Acceptability of subscription price level for your company versus value received
4. Fairness of research method between different classes of publication (e.g. dailies, weeklies, monthlies)
4. Fairness of research method

**Agencies**
- 75%

**Publishers**
- 73%

**Geographic Regions**
- N. America: 74%
- Europe: 76%
- APAC: 75%
- Latam: 71%
- Aust.: 78%

**Subscription**
- JICs: 77%
- Others: 78%

**Other Providers**
- VNU: 75%
- Kantar: 80%
- NOP (MRI): 70%
- Others: 75%
Six key issues

1. Measurement of all reader sources of a publication

2. Sufficient sample size to meet marketplace needs (including measurement of key niche titles)

3. Acceptability of subscription price level for your company versus value received

4. Fairness of research method between different classes of publication (e.g. dailies, weeklies, monthlies)

5. Availability and usefulness of qualitative data
5. Availability/usefulness of qualitative data

- **Agnecies**: 48%
- **Publishers**: 50%

- **N. America**: 69%
- **Europe**: 43%
- **APAC**: 43%
- **Latam**: 46%

- **Subscription**: 50%
- **JICs**: 40%
- **Others**: 63%

- **VNU**: 54%
- **Kantar**: 45%
- **NOP (MRI)**: 69%
- **Others**: 46%
Six key issues

1. Measurement of all reader sources of a publication
2. Sufficient sample size to meet marketplace needs (including measurement of key niche titles)
3. Acceptability of subscription price level for your company versus value received
4. Fairness of research method between different classes of publication (e.g. dailies, weeklies, monthlies)
5. Availability and usefulness of qualitative data
6. Ability to access disaggregated (raw, respondent-level) data for your own analyses
6. Ability to access raw data

- Agencies: 55%
- Publishers: 69%

- N. America: 81%
- Europe: 53%
- APAC: 45%
- Latam: 66%

- Subscription: 50%
- JICs: 57%
- Others: 66%

- VNU: 40%
- Kantar: 56%
- NOP (MRI): 75%
- Others: 56%
The (customer) agenda going forward…

• Find ways to integrate readership via the web into the standard industry surveys

• Incorporate sensible qualitative questions into the mainstream surveys – they may be more important to advertising ‘effect’ then spurious standards of ‘accuracy’

• Experiment and report back to the industry

• Lift restrictions on accessing respondent-level data