A global review of print readership surveys

Andrew Green
Global Research Director, billetts connections

15 June 2004

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.
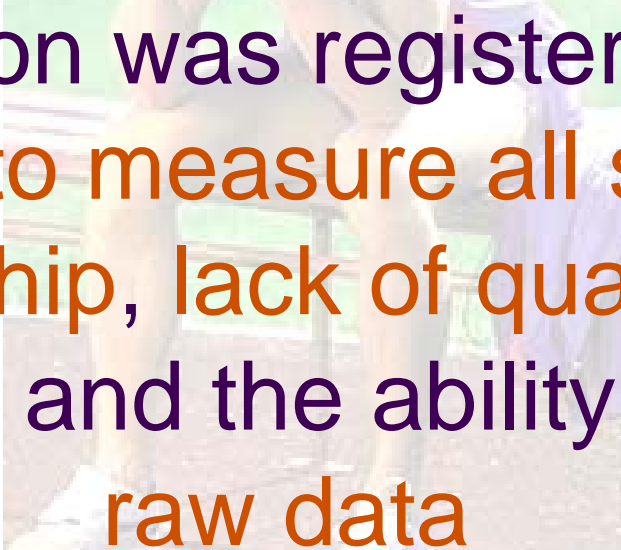
Research summary

- **'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**

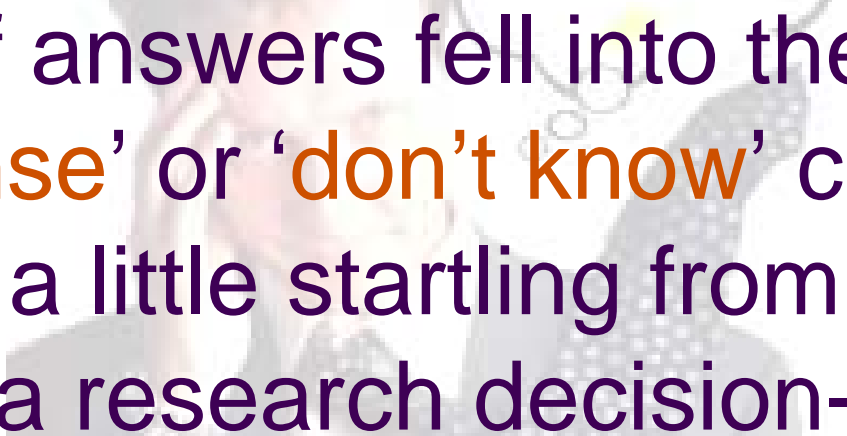- **166 completed questionnaires**
  - **141 agencies**
  - **25 publishers**

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
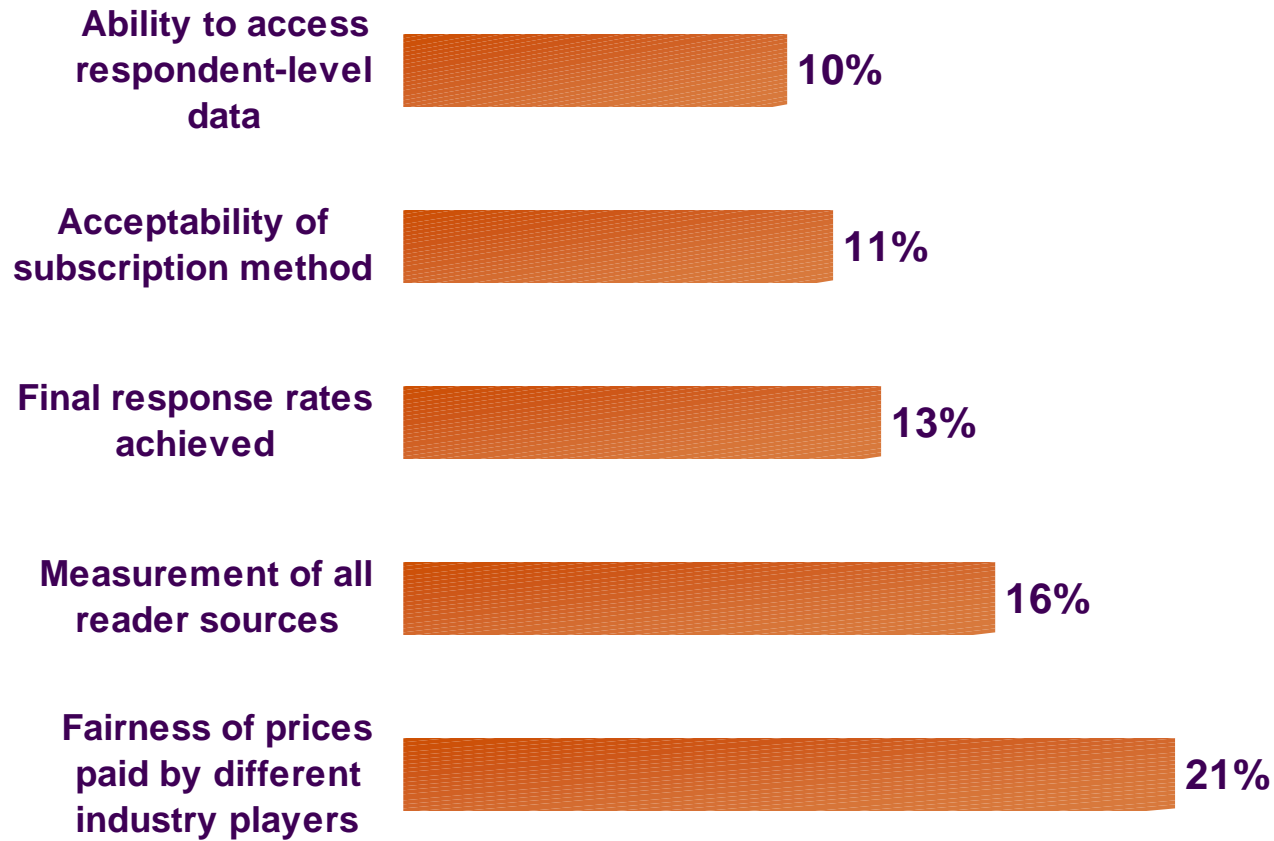
Dissatisfaction was registered in areas like failure to measure all sources of readership, lack of qualitative information and the ability to access raw data

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%

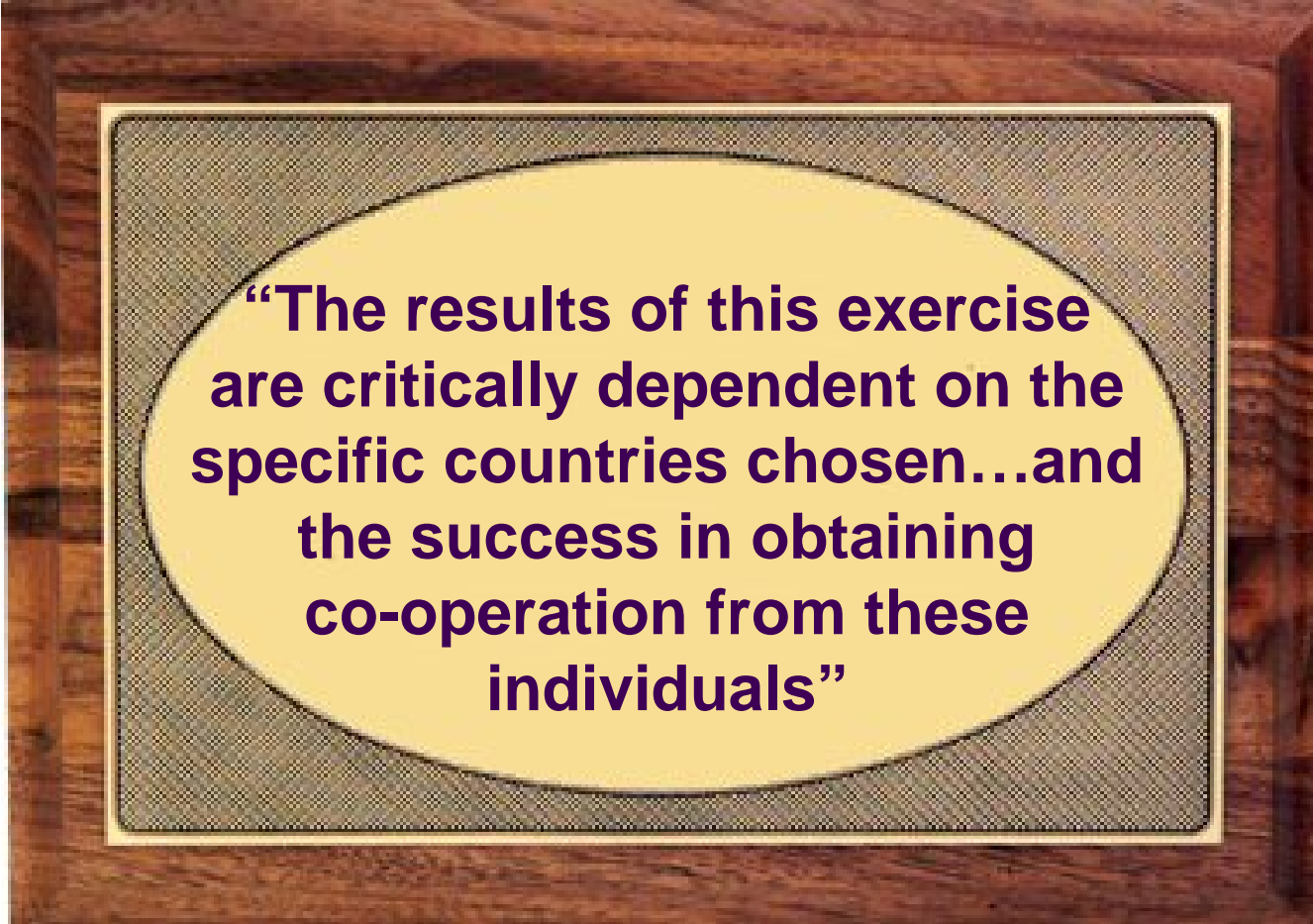**Fairness of prices paid by different industry players** — 21%

Number of surveys by region/type

Region	JIC	MOC	Subscription	TRCC
North America	0	1	9	1
Latin America	0	0	5	0
Europe	10	5	13	0
APAC	1	0	16	0

Number of surveys by supplier*

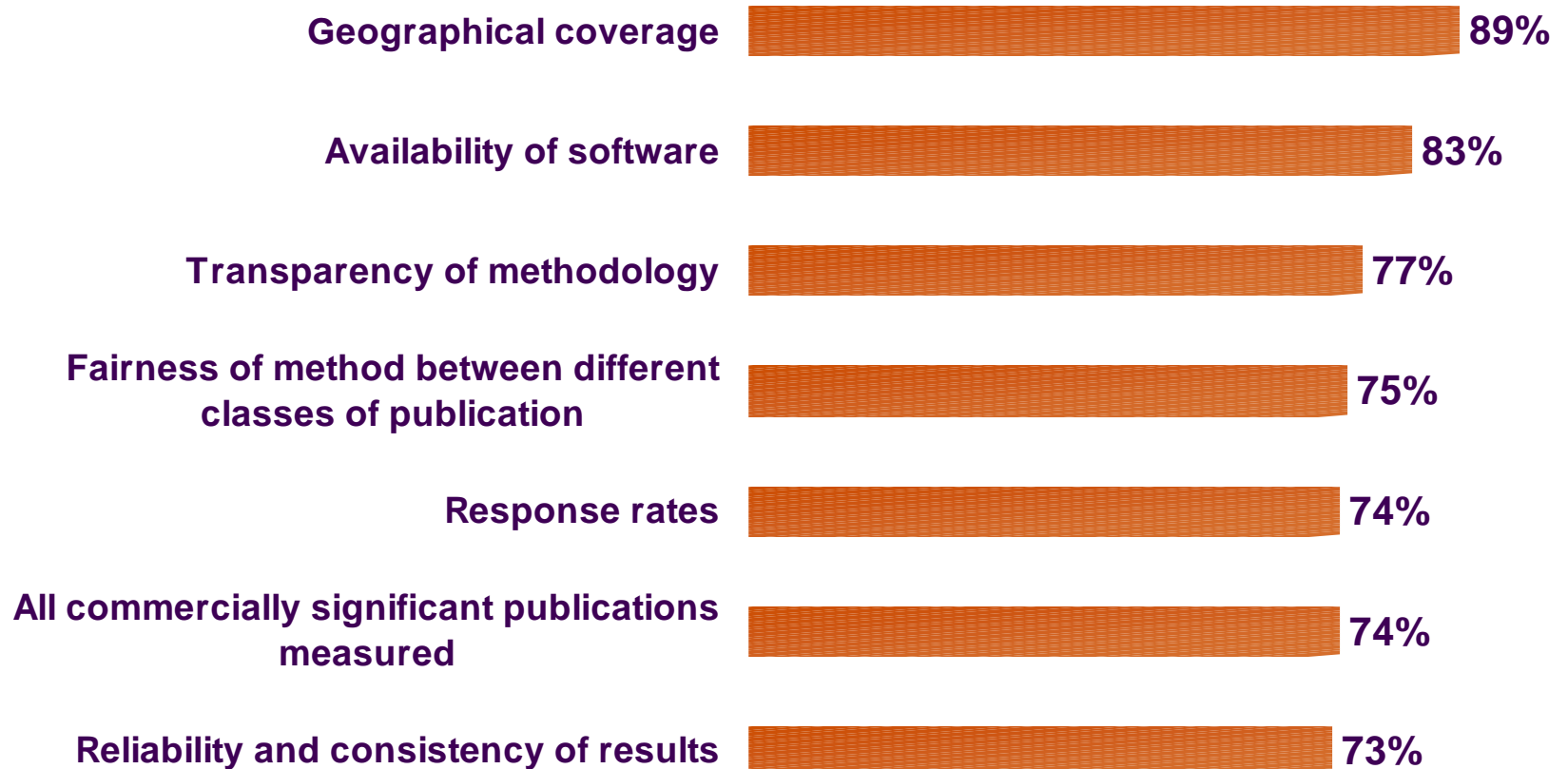| **vnu** (3%)	**Kantar** (5%)	**tns** (2%)	**'Others' (36%)**		
Australia	China (part)	Belgium	Australia	Iceland	Romania
Hong Kong	India	Denmark	Austria (2)	India	Spain
Malaysia	Ireland	Lithuania	Canada (2)	Ireland	Switzerland
New Zealand	Mexico	Norway	Colombia	Italy	USA (5)
Philippines	Poland	Russia	Czech Rep.	Japan (4)	
Singapore	Sweden	Turkey	France	Netherlands	
Taiwan	UK	Vietnam	Germany	Philippines	
USA	USA		Greece (2)	Portugal	
GfK (0%)	**NOP World** (46%)	**IBOPE** (1%)	**Ipsos** (7%)		
Czech Republic	USA (2)	Argentina Peru	Hungary Chile UK		

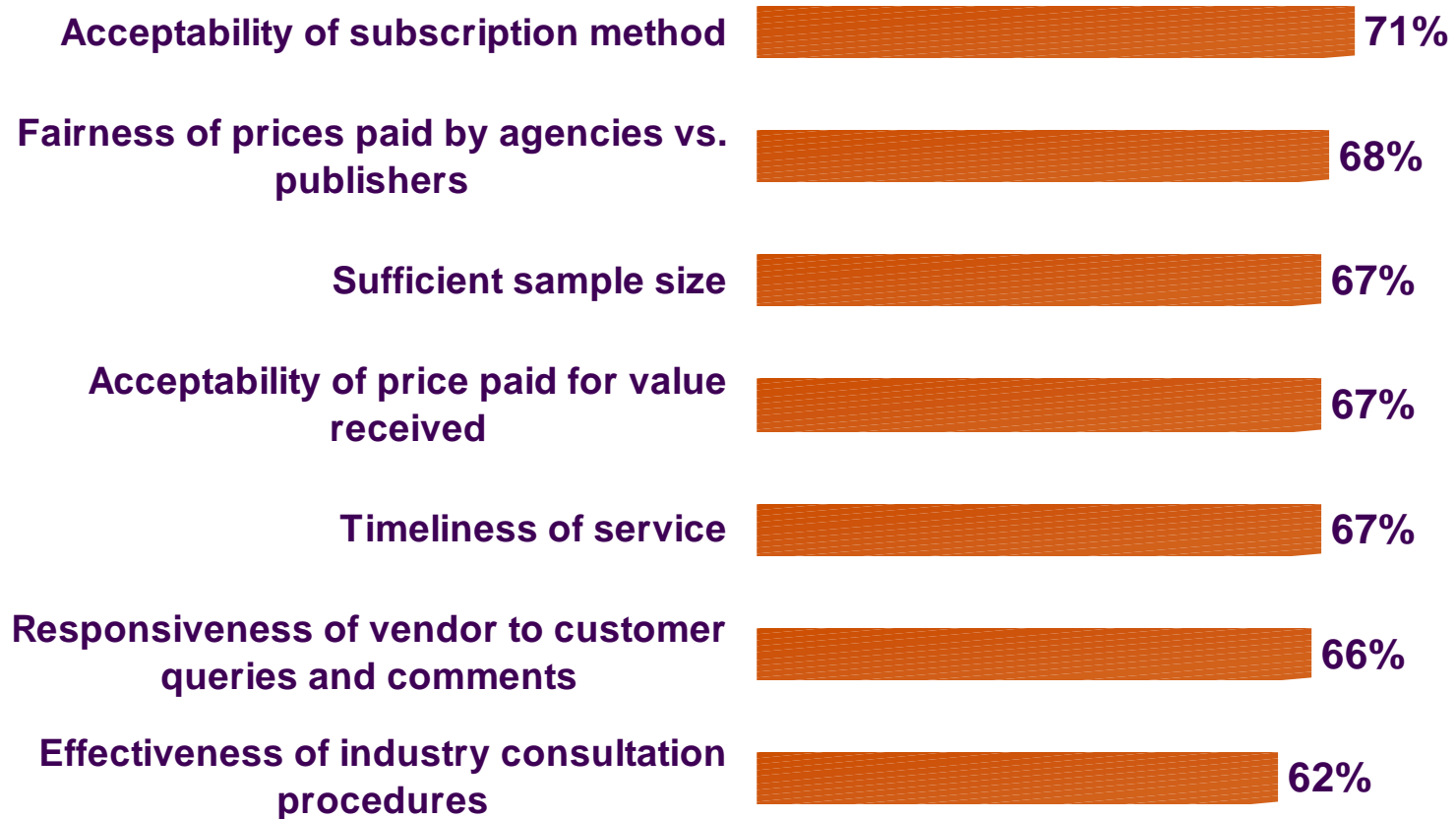*Market share weighted by total adspend

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"
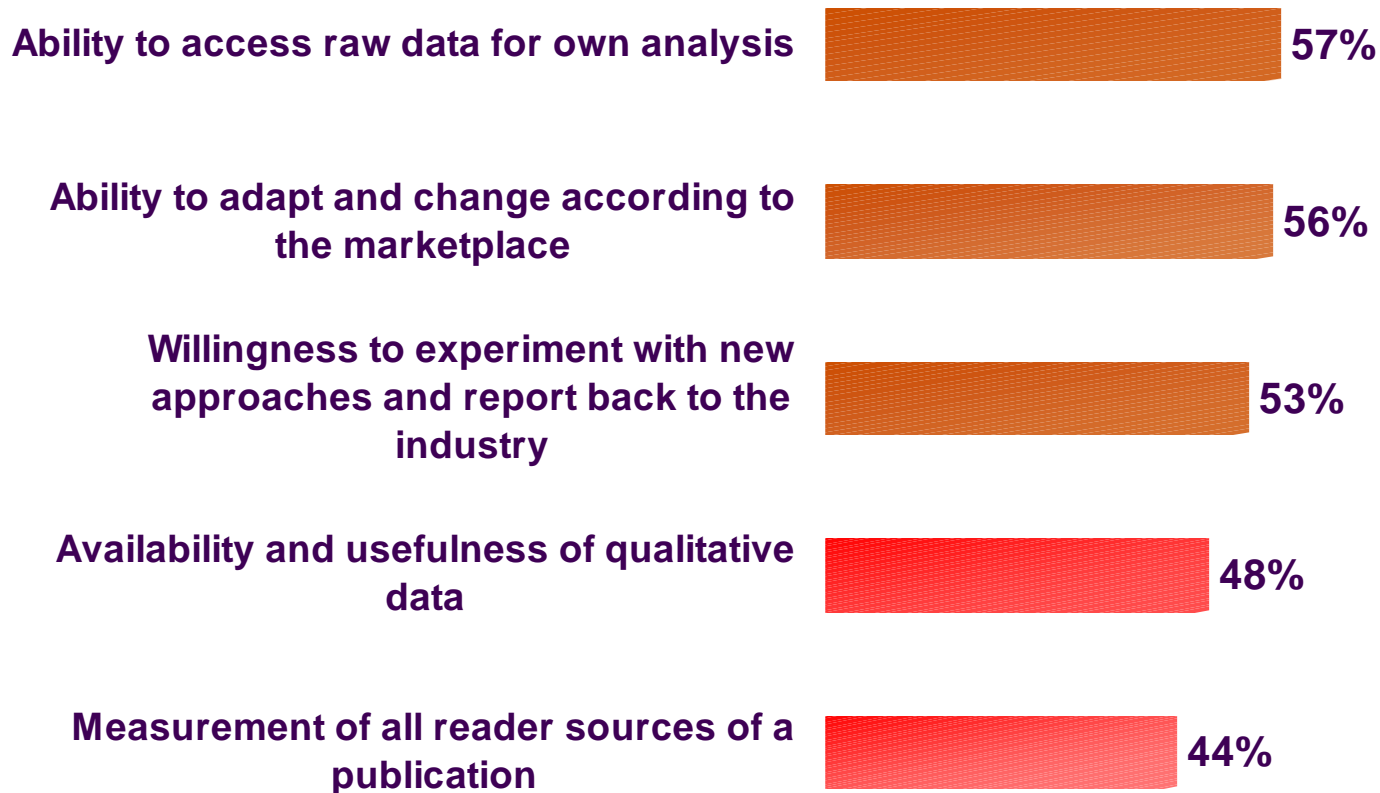
Global summary: performance criteria (1)

Criteria	Percentage
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)

Criteria	Percentage
Acceptability of subscription method	71%
Fairness of prices paid by agencies vs. publishers	68%
Sufficient sample size	67%
Acceptability of price paid for value received	67%
Timeliness of service	67%
Responsiveness of vendor to customer queries and comments	66%
Effectiveness of industry consultation procedures	62%

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
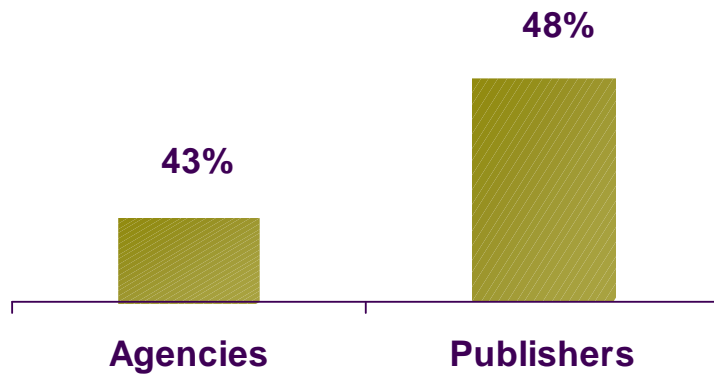
TV Peoplemeter surveys

68%

Source: Peter Menneer, WAM 2003

Drilldowns: Six key issues

Six key issues
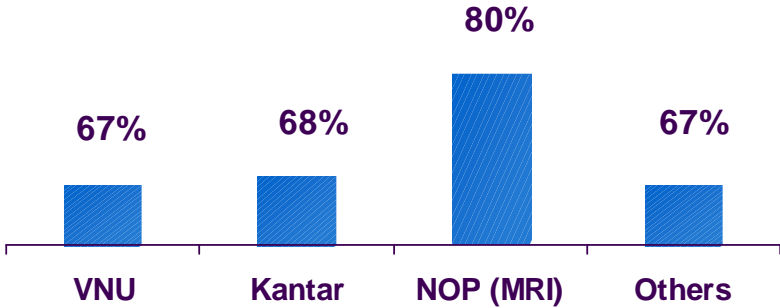
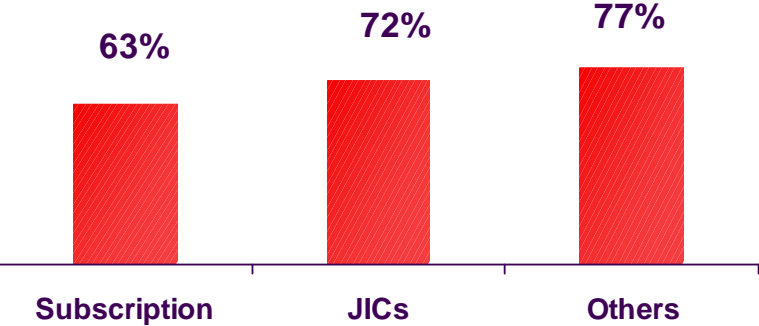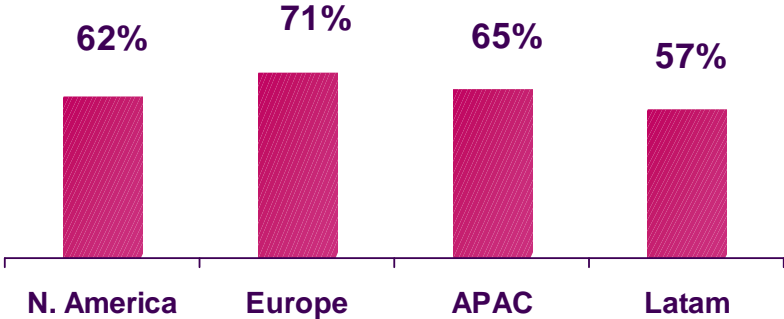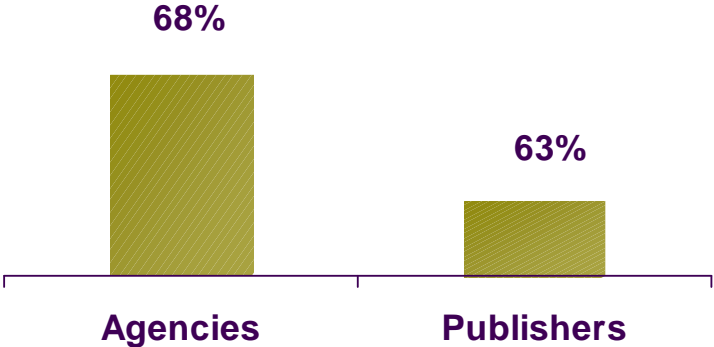1. **Measurement of all reader sources of a publication**

1. Measurement of all reader sources
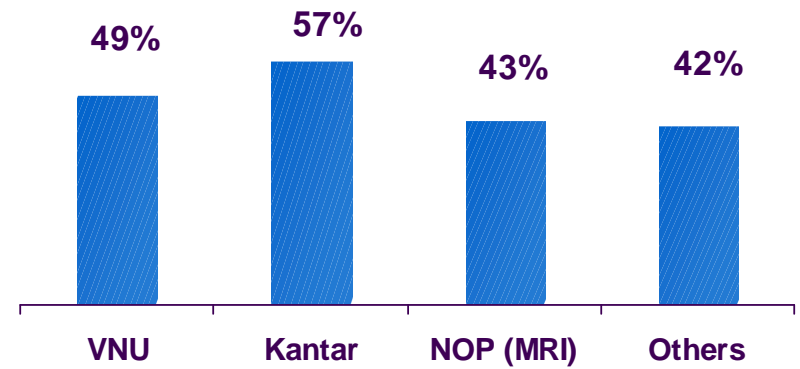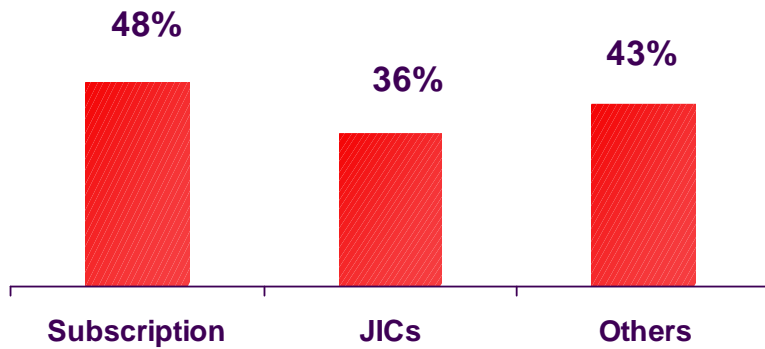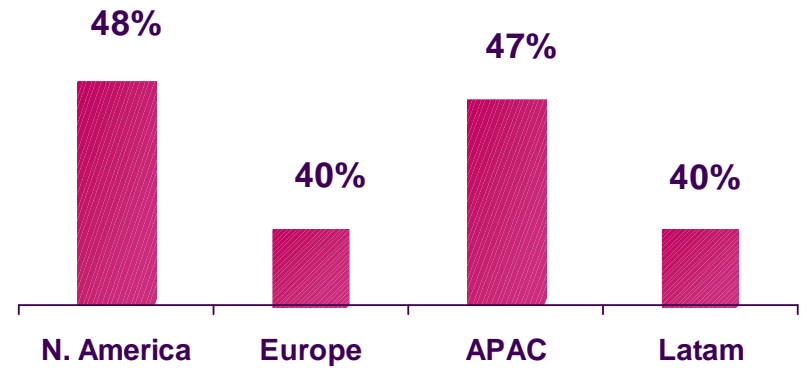
Six key issues

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

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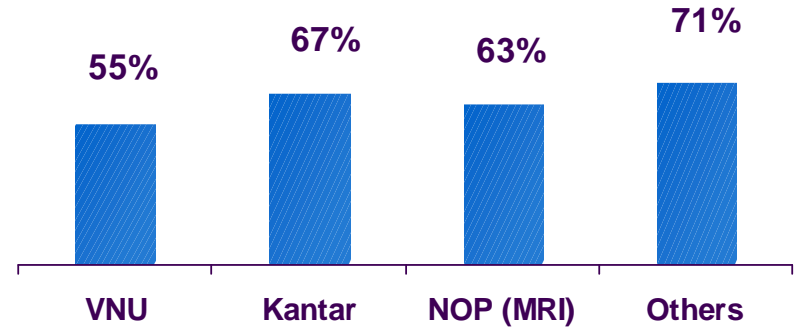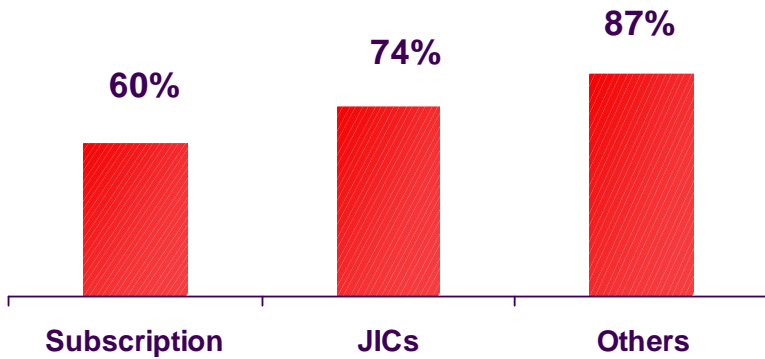
2. Sufficient sample size

Agencies 68%
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)**
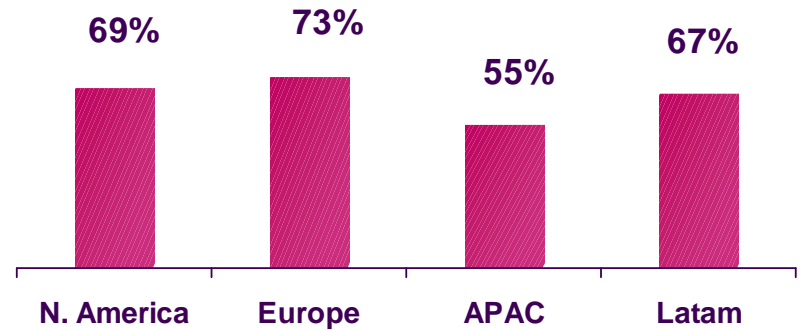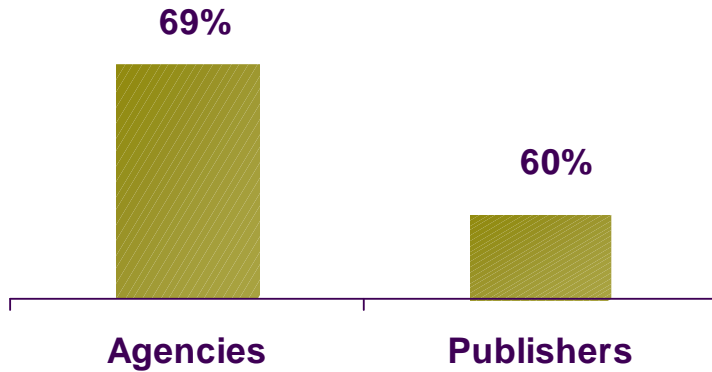
3. **Acceptability of subscription price level for your company versus value received**
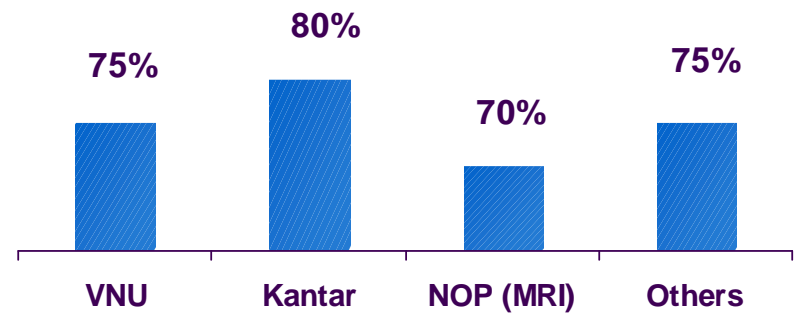
3. Acceptability of subscription price level

69% Agencies
60% Publishers

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

60% Subscription
74% JICs
87% Others

55% VNU
67% Kantar
63% NOP (MRI)
71% Others

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

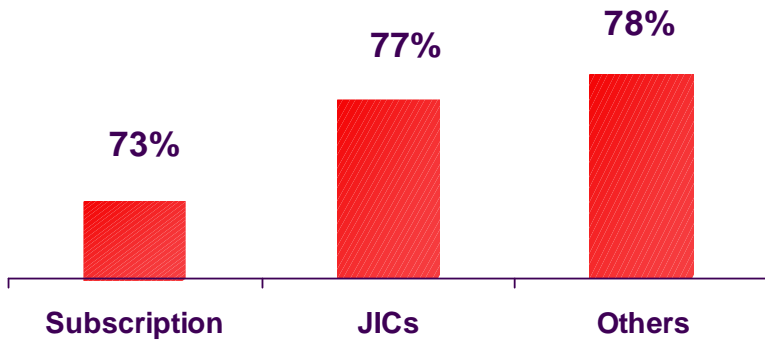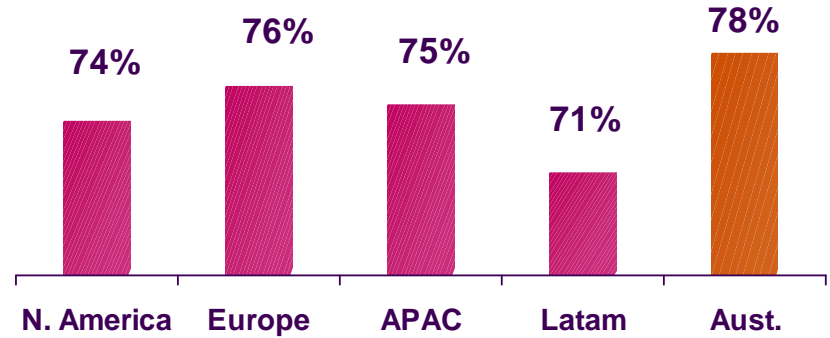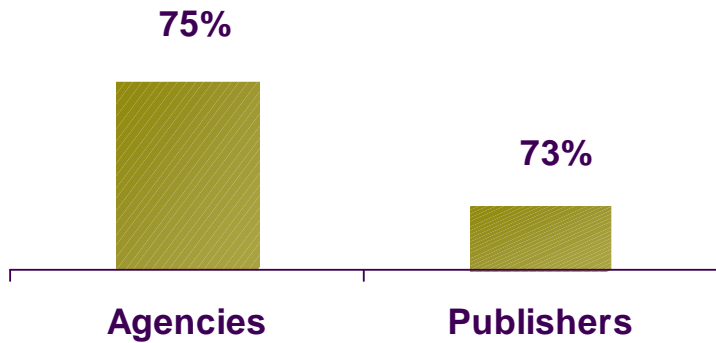4. Fairness of research method between different classes of publication (e.g. dailies, weeklies, monthlies)

4. Fairness of research method

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

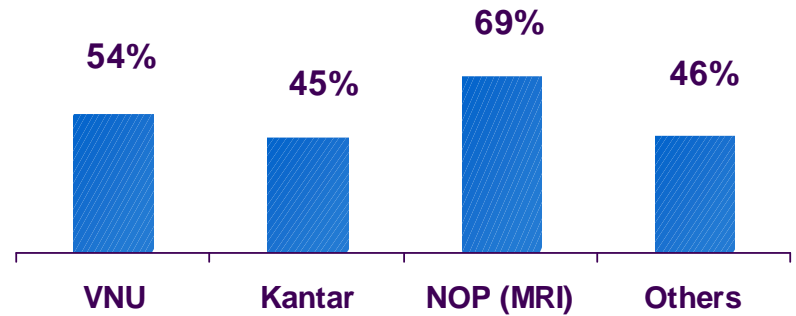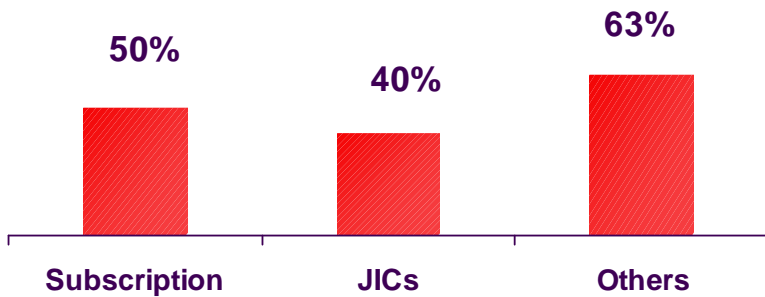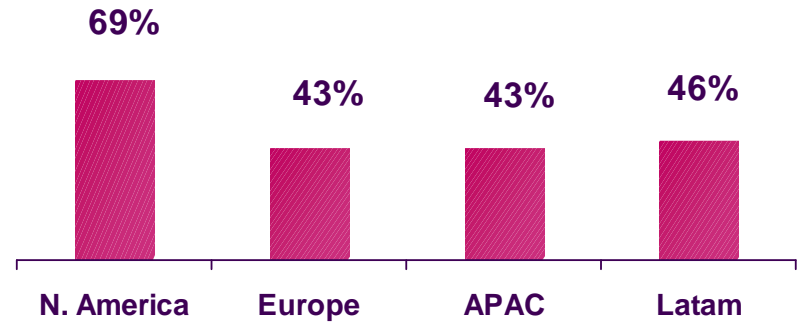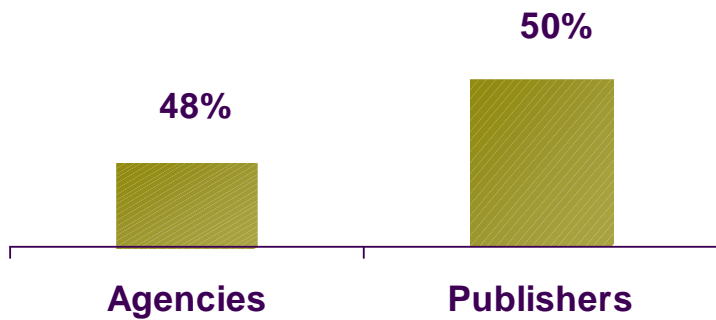4. Fairness of research method between different classes of publication (e.g. dailies, weeklies, monthlies)

5. Availability and usefulness of qualitative data

5. Availability/usefulness of qualitative data

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)**
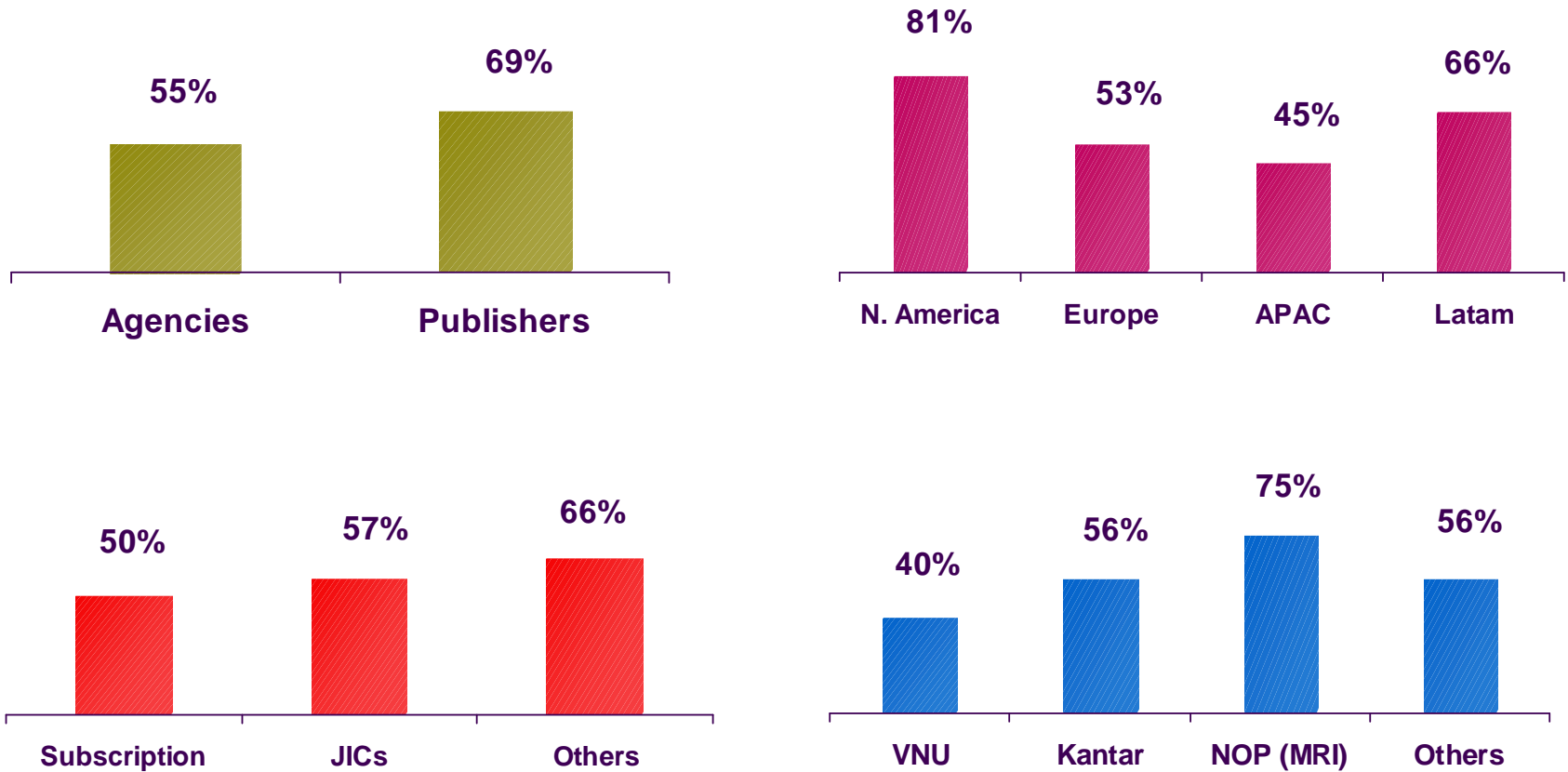
5. **Availability and usefulness of qualitative data**

6. **Ability to access disaggregated (raw, respondent-level) data for your own analyses**

6. Ability to access raw data

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**