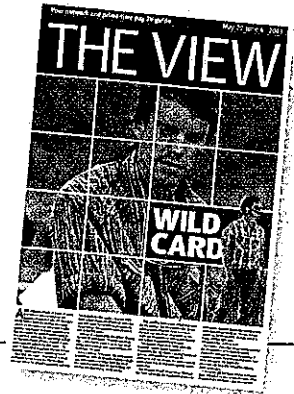
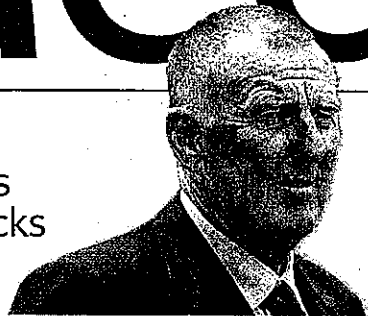


Media



PLUSH PUSH
John Singleton's
joint venture rocks
TV adland P11



THE BROWN AFFAIR
Fear and loathing at
SBS as new TV chief
swings the axe P3

**AUSTRALIA'S
BEST WEEKLY
TV GUIDE**

READING BETWEEN THE LINES

How credible are
Morgan's readership
figures?



MULTICULTURAL DIVIDE MARK DAY ON THE ETHNIC PRESS SCANDAL P7

COVER STORY

Magazine readership April 2002 to March 2003

Source: Roy Morgan Research

Summary of categories	Mar 03 000s	Dec 02 000s	Mar 02 000s	Mar 03 vs Mar 02 % change	Mar 03 vs Dec 02 % change
Food	2,973	2,891	2,272	30.9%	2.8%
Homemaker	3,714	3,704	3,431	8.2%	0.3%
Women's Fashion	998	974	1,008	-1.0%	2.5%
Gardening	1,550	1,559	1,580	-1.9%	0.6%
Health/Parenting	1,213	1,199	1,206	0.6%	1.2%
Motoring	3,562	3,454	2,868	24.2%	3.1%
Sporting	1,273	1,313	1,468	-13.3%	-3.0%
Mass	12,188	12,211	12,293	-0.9%	0.2%
Youth/Music	2,662	2,790	2,752	-3.3%	4.6%
Women's Lifestyle	3,153	3,144	3,247	-2.9%	0.3%
Bridal	246	253	159	54.7%	-2.8%
Men's Lifestyle	1,270	1,288	1,159	9.6%	1.4%
Business and Airline	2,142	2,170	2,337	-8.3%	-1.3%
Computer	1,817	1,967	1,978	-8.1%	-7.6%
Men's Interest	494	555	573	-13.8%	-11.0%
Other	6,433	6,398	6,144	4.7%	0.5%
TOTAL	45,688	45,870	44,475	2.7%	-0.4%

Australians prefer to focus on their home-making

Sally Jackson

IF our reading habits are any guide, Australians are going through a nesting phase. According to the latest readership figures from Roy Morgan Research, in the year to March we have been turning to food magazines (with overall readership up 31 per cent), motoring titles (up 24 per cent) and homemaker magazines (up 8 per cent).

Among titles benefiting most from the readership rise are *Australian Good Taste* (up 19.5 per cent), *Australian Interiors* (up 67.5 per cent, off a low base) and *Motor* (up 44 per cent).

Brides-to-be remain ardent magazine buyers, with readership of wedding magazines growing by almost 55 per cent in the 12 months, although this was principally due to the launch of a third title in the category, *Modern Wedding*.

The number of people reading the top women's titles, which include some of the biggest selling mags, was steady at about 12.2 million. *The Australian Women's Weekly*, a monthly, remains the best read title, with 2.7 million readers, ahead of *Woman's Day*, a weekly, with nearly 2.5 million. Also in the million-or-more club are *Better Homes and Gardens* (1.5 million readers), the monthly Foxtel program guide (1.3 million), *That's Life!* (1.22 million) and *Reader's Digest* (1.21 million).

Men hit the newsstands during the year, with strong performers including *Ralph* (up 17 per cent) and *People* (up almost 8 per cent). Readership of sports magazines sank, though. Hardest hit were *Golf Magazine* (down 27 per cent), *Inside Sport* (down 16.5 per cent) and *Inside Football* (down 13 per cent).

Business mags were also pounded, with the category declining by 9 per cent. Hardest hit was *Money Management*, which saw its readership tumble 23 per cent, and *Shares*, down almost 13 per cent.

For the first time *The Big Issue*, the fortnightly mag sold on the streets by disadvantaged people, was included in the statistics. Its readership since August was put at 95,000 copies.

Among newspapers, weekday editions fared best while readership of Saturday and Sunday papers dropped off — with the exception of Sydney's *The Sunday Telegraph*, which grew another 2 per cent to 1.96 million readers, remaining the nation's

Newspaper readership

Readership aged 14+	12 months to March 02	12 months to March 03	12 mth % change
National			
The Australian - M-F	415,000	453,000	+9.2%
Weekend Australian	895,000	910,000	+1.7%
Australian Financial Review - M-F	280,000	290,000	+3.6%
Australian Financial Review - Sat	183,000	177,000	-3.3%
NSW			
Daily Telegraph - M-F	1,208,000	1,216,000	+0.7%
Sydney Morning Herald - M-F	871,000	879,000	+0.9%
Daily Telegraph - Sat	996,000	991,000	-0.5%
Sydney Morning Herald - Sat	1,290,000	1,333,000	+3.3%
Sunday Telegraph	1,917,000	1,958,000	+2.1%
Sun-Herald	1,518,000	1,479,000	-2.6%
Victoria			
Herald Sun - M-F	1,496,000	1,510,000	+0.9%
Age - M-F	661,000	689,000	+4.2%
Herald Sun - Sat	1,469,000	1,414,000	-3.4%
Age - Sat	1,071,000	1,022,000	-4.6%
Sunday Herald Sun	1,520,000	1,498,000	-1.4%
Sunday Age	657,000	648,000	-1.4%
QLD	115,000	139,000	+20.9%
Queensland			
Courier Mail - M-F	566,000	600,000	+6.0%
Courier Mail - Sat	918,000	954,000	+3.9%
Sunday Mail	1,430,000	1,458,000	+2.0%
South Australia			
Advertiser - M-F	578,000	580,000	+0.3%
Advertiser - Sat	737,000	750,000	+1.8%
Sunday Mail	810,000	790,000	-2.5%
Western Australia			
Sunday Times	888,000	892,000	+0.5%
West Australian - M-F	620,000	582,000	-6.1%
West Australian - Sat	1,035,000	1,045,000	+1.0%
Tasmania			
Mercury - M-F	131,000	133,000	+1.5%
Examiner - M-F	89,000	83,000	-6.7%
Advocate - M-F	65,000	64,000	-1.5%
Mercury - Sat	162,000	159,000	-1.9%
Examiner - Sat	101,000	96,000	-5.0%
Advocate - Sat	71,000	71,000	+0.0%
Sunday Tasmanian	137,000	141,000	+2.9%
Sunday Examiner	101,000	106,000	+5.0%
Northern Territory			
N.T. News - M-F	54,000	48,000	-11.1%
N.T. News - Sat	60,000	63,000	+5.0%
Sunday Territorian	51,000	50,000	-2.0%

Source: Roy Morgan Research

most widely read paper. *The Australian* posted one of the largest rises of the survey, increasing readership of its Monday-to-Friday editions by 9.2 per cent to 453,000 readers per day. The Saturday edition rose 1.7 per cent. However, the biggest gain went to the *Illawarra Mercury*, which increased read-

ership of its Saturday paper by 11.8 per cent to 114,000.

Among the largest falls were the Saturday editions of Melbourne's *The Age* (down 4.6 per cent), although readership of its weekday editions rose 4.2 per cent) and *Herald Sun* (down 3.4 per cent, while the weekday editions rose 0.9 per cent).

Industry figures claim Roy Morgan readership figures are wrong — because they ignore the complexities of today's publishing. Mark Day reports

IN the year from March 2002 to March 2003, sales of the Melbourne *Sunday Herald Sun* rose by 19,000 copies. At the same time, according to the latest Roy Morgan readership figures, the newspaper lost 22,000 readers. Over the same period, *The Australian's* Monday to Friday sales rose by 4258 copies, or 3.3 per cent, yet it stacked on 38,000 readers — a 9.2 per cent lift.

Go figure. According to Morgan, the latest figures are accurate and delivered by the most modern and reliable methodologies available in the world. According to advertising experts such as Harold Mitchell, they test common sense and credibility.

"But," says Mitchell, the head of Australia's largest media buying agency, Mitchell & Partners, "it's always been like that. I've been arguing with Gary Morgan about his figures for 28 years now, and I am certain he can explain at great length why he's right and I'm wrong. It's just that I can't afford to wipe out half a week to listen."

Readership figures are of vital importance to newspaper and magazine publishers. They are the main currency of advertising sales. While circulation figures show how many

A call for more rigorous information, greater depth of data, and greater transparency

copies are being sold, readership uncovers how many people are reading and, to a significant extent, who they are in terms of demographics. This is the information advertisers need most. If they're selling a product to young people, they don't want to be advertising in publications that are read by retirees.

The print industry is divided about the value and accuracy of the Morgan figures. While relations between Morgan and News Limited, publisher of *The Australian*, have been strained during the past year, the feeling at Fairfax and ACP is less hostile.

But among publishers and advertisers alike, there are growing calls for a new approach to be taken to measuring readership through a new entity to take on and overthrow Morgan.

This was first suggested last year by the CEO of News Limited, John Hartigan, in a speech to the Audit Bureau of Circulations on its 70th anniversary. Hartigan said News had been suspicious about Morgan's figures and methodologies for many years, and had queried the past eight surveys. He revealed News had invited Nielsen Media Research to undertake some readership studies on its chain of suburban newspapers,

but the company declined, saying it did not have the proper infrastructure. "So perhaps it is now time to consider establishing a new entity, involving all stakeholders, to set standards and methodologies which will accurately measure readership," he told the ABC audience.

"There is a model. The television industry saw benefits in the free-to-air stations owning their own research information, so they got together to establish OzTAM.

"An industry research body would need its output to be independent; it would require the involvement and co-operation of all publishers, advertisers and agencies, and it would need to find ways of employing the most modern measuring techniques in the world to set new standards, rather than Morgan's 50-year-old recall methods."

Hartigan said he was putting the idea forward as a personal view rather than as official News Limited policy, but added: "If what I have said is interpreted as a shot across Morgan's bows, so be it. It won't come as any surprise to them."

Hartigan is supported by John Sintras, head of the Starcom Media agency and president of the Media Federation of Australia. Sintras says he believes the Morgan figures are a "blunt instrument" that flattens out the peaks and troughs of newspaper readership. "Advertisers don't want that," he says. "They get minute-by-minute viewing figures for television; they want to know more about seasonal readership changes, spikes in readership from big events, and more details about the people who read the growing number of specialist sections in newspapers.

"This is not an anti-Morgan thing," he says. "It's a call for more rigorous information, greater depth of data, and greater transparency."

Sintras says the MFA and the Australian Association of National Advertisers are working together and are planning discussions about the creation of a new body, similar to OzTAM, in June or July. "There are any number of models we could look at," he says. "We just want to get it happening."

The depth of feeling against Morgan research is perhaps influenced by the character of Gary Morgan himself. Pugnacious, self-confident, and frequently loud and assertive in his dealings with his clients, Morgan has never been afraid to speak his mind or to tread on toes.

This is often interpreted by those who work with Morgan as an unwillingness to hear criticism or even discuss alternative methodologies to overcome publishers' or advertisers' doubts about readership figures.

Harold Mitchell, no shrinking violet himself, chuckles as he recalls an incident years ago when he and Morgan conducted an argument about the veracity of the Morgan figures on a Saturday morning among the antique shops of High Street, in Melbourne's Armadale.



If what I have said is interpreted as a shot across Morgan's bows, so be it. It won't come as any surprise to them.

John Hartigan
News Limited CEO



I've been arguing with Gary Morgan about his figures for 28 years now.

Harold Mitchell
Mitchell and Partners



It's a much more satisfying relationship now. We accept that it is not easy to reach people in business publication niches.

Michael Gill
Fairfax Business Media



From time to time we do have issues with Morgan... but as we look around the world at other systems, we generally conclude that Morgan is right for us.

Miriam Condon
ACP research director



No one could do it better. We do the best job in the world substantially better, and we are continuously improving.

Michele Levine (with Gary Morgan)
CEO Roy Morgan Research

WHO'S COUNTED?

"We were shouting at each other, because he was on one side of the street and I was on the other. We are still on different sides of the street."

According to another Morgan client, who would not be named, "No research is perfect. It all can be improved. But you need people who want to try, rather than just bluster about it."

Gary Morgan has recently sealed down his Roy Morgan Research involvement, with chief executive Michele Levine taking on a greater role in dealing with publishers.

Heather White, News Limited's strategy planning manager, says Morgan now appears to be more willing to enter dialogue, but she is still not satisfied that all questions about methodology have been addressed. "The world is changing, and we can't be sure Morgan is changing with it," she says. "They still do face-to-face interviewing, and they do it on weekends only. This makes it hard for interviewees to get into high-rise apartments or high-security dwellings; there are more locked gates, and more gated estates. The more affluent they are, the less they tend to be at home, and the less willing they are to devote the minimum 45 minutes needed to answer the omnibus questions or fill out questionnaires."

"This means it is very difficult to measure the A-B socio-economic quintiles which are highly sought-after by advertisers. Telephone surveys would work well for newspapers, but not for magazines, because there would be a problem with cover

recognition. So it's a dilemma we're still trying to work our way through to get a win-win result."

Alan Howe, the editor of the *Sunday Herald Sun*, says he believes Morgan's methodology is deeply flawed. Face-to-face interviews on weekends mean respondents are asked questions about his paper published at least six days earlier. "According to Morgan's figures, by the time I am selling 750,000 copies of the *Sunday Herald Sun*, I won't have a reader left," he says. "Why should anyone trust figures that are gained from face-to-face interviews with people who happen to be at home when a researcher calls? And how do they assume the habits of the tens of thousands of Melbourneans living in large apartment blocks, to which Morgan's people have no access?"

Michael Gill, publisher of Fairfax Business Media, has also been critical of Morgan's ability to measure A-B readership accurately. But, he says after putting his case to Morgan, there is now a better understanding between the parties. "It's a much more satisfying relationship now," Gill says. "We accept that it is not easy to reach people in business publication niches."

"Top business people who read publications such as *Boss*, or *The Australian Financial Review Magazine*, are the first to refuse if you put a huge questionnaire in front of them. They don't have the time. As CEOs they have other people to fill out forms for them. We've talked

through these issues with Morgan, and now have a better mutual understanding."

James Hooke, formerly strategy manager for Fairfax, and now general manager of the group's regional and community newspapers, says he is also comfortable with Morgan's methodology. "By global standards, they're one of the most comprehensive," he says. "Niche audiences are always difficult to survey, and it's harder to get accurate figures on magazines inserted in newspapers."

"Morgan's through-the-book methodology, where you pull out a physical copy of the magazine and ask respondents if they read it, and which articles, is better than the old

▶ The world is changing, and we can't be sure Morgan is changing with it

show card methods, where the cover only of a magazine is shown.

"Our dealings with Morgan have been a two-way street — they have educated us on what our expectations should be, and we've put our case. We're happy that they see the need for continuous improvement."

"I think some of the issues which News sees as problems are red herrings. The reality is that there is presently no credible alternative. Even if you had an OzTAM-style entity, there is a big question as to whether the advertising industry would accept it, and it is in no way clear that it would produce a better

result. The issues would remain. Swapping Morgan for an OzTAM wouldn't make CEOs participate in surveys."

Miriam Condon, planning and research director for ACP, says her company is "generally happy" with the latest research figures. "We've put in an enormous amount of work revamping and refreshing our titles, and the readership figures are where we would expect them to be as a result — up," she says.

"From time to time we do have issues with Morgan, and sometimes it takes time to get a resolution, but as we look around the world at other systems, we generally conclude that Morgan is right for us. We subscribe

to very comprehensive monthly data, and as a result I think it would be hard for us to find a survey to replace Morgan. We would wonder if we were perhaps compromising our comparative advantages to do so."

Morgan's Levine is as uncompromising as her boss when it comes to singing the praises of the Roy Morgan readership research. "No one could do it better," she says. "We do the best job in the world — substantially better, and we are continuously improving. We're having a dialogue with News Limited, and addressing the issues, but the strongest thing going for us is that

we're independent. We are not aligned to the publishers, and advertisers realise they need that independence. And you have to ask: could anyone else do a better job? Nielsen were approached, but they couldn't do it. They had to walk away."

So how does Levine explain the drop in readership for the *Sunday Herald Sun* or the sharp rise for *The Australian*?

"There could be many reasons," she says. "It is possible that people buy but do not read — quite often there are special marketing or sales promotions which can influence these things, such as a deal where if you buy Monday to Saturday, you get Sunday free. It's a sale, but it's not necessarily a reader. Readership may follow as people get the habit."

"There are other possibilities. Saturday papers are getting bigger and bigger, and perhaps better, too. As Saturdays get better, they can eat into Sunday readership."

"There are often a number of reasons why numbers don't seem to correlate survey to survey, but over a period, trends will show and blips will tend to flatten."

And *The Australian's* lift in readership? "*The Australian* has been advertising heavily on television. We use the worm [of pre-election political debate fame] to measure people's positive or negative responses to advertising, and *The Australian's* ads have tested strongly positive. So maybe the advertising is working."

DEFENDING MORGAN

Gary Morgan's readership figures are a pretty good performance in what is an imperfect art.



by Harold Mitchell

Just when I thought we were in for an easy time, suddenly there's a raging argument again about readership figures.

At the centre is Gary Morgan. On one side it seems newspaper publishers feel as if they've been badly done by and there's some thought of a new way of

It seems at the moment that Morgan is at the centre of attacks, generally by those who don't agree with his numbers. John Sintras, president of the Media Federation of Australia, says he believes the Morgan figures are "blunt instruments" that flatten the peaks and troughs of newspaper readership.

He goes on to call for more rigorous information, greater depth of data and greater transparency. I'd have to say I disagree entirely with Sintras. I've always found that Morgan is a completely open book. He'll discuss anything. Take

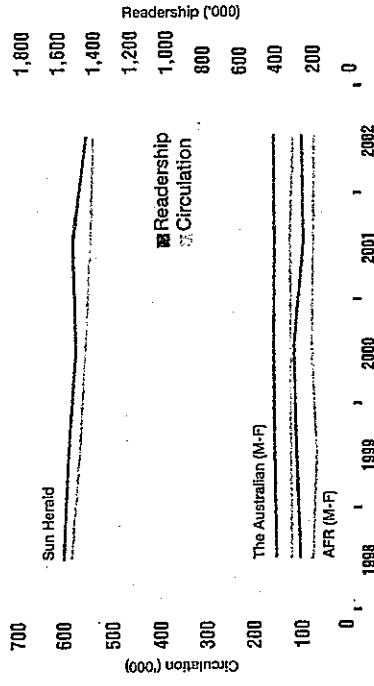
All interviewing is conducted face-to-face at weekends, although some editors have said "why should anyone trust figures that are gained from face-to-face interviews with people?" I'm not entirely sure what alternative would give a greater level of understanding.

The method of interview — "Which of these newspapers did you read or look at yesterday?" — understands the most recent reading experience. Mastheads are not used and therefore bias is taken out. For weekly and monthly magazines, the technique is adjusted and has been refined over many years to be as close to perfect as any research can be.

Back to the comment by Sintras, who believes that the Morgan figures are "blunt instruments". I looked at the comparative data of the *Sun-Herald*, *The Australian* and the *Australian Financial Review* of readership and circulation over the last four years. Morgan and the circulation have great parallels.

It seems pretty hard to find a case of shooting the messenger or killing off Gary Morgan when you see data like this. Let's move on and consider the great strength of a single source database and the very great use that we as media people harness from the information.

COMPARISON OF CIRCULATION AND READERSHIP 1998 - 2002



Source: Roy Morgan research/Audit Bureau of Circulations

- ★ Morgan offers:
 - ★ one of the largest samples (only China, India and Russia have larger samples)
 - ★ quarterly reporting
 - ★ coverage of all media consumption as well as extensive product and services usage
 - ★ extensive use by marketers, media and agencies
 - ★ checks with other data (eg sales) which show high accuracy.
- Although the large questionnaire is often criticised (particularly by Nielsen), similar questionnaires are accepted in the US and UK and have been proved to be accurate

with little respondent fatigue. The argument that we need an OzFam-type body is ridiculous.

One of the problems we have occasionally in Australia is not recognising something for what it is. Morgan is a pretty good performer at what is an imperfect art. I hope we don't get some people trying to throw the baby out with the bathwater. Not that Gary Morgan needs any defending — he's quite capable of doing that for himself. ★

Harold Mitchell is chairman of Mitchell & Partners.

"I'd have to say I disagree entirely with Sintras. I've always found that Morgan is a completely open book."

doing things, although I'm not sure anyone knows quite what it is. It's interesting to look back at the television survey system where the industry tossed out a method that seemed to be working and spent the next two years with the new system that caused turmoil at every level.

I should declare a history of having arguments with Gary Morgan that goes back for many years. They are always rigorous discussions. In fact, there's hardly any other kind you can have with Gary.

you right into the depth of what they do and leave no stone unturned.

Just for the record, the Morgan method is probably the best way in the world of understanding readership. Apart from anything else, consider the high sample numbers compared to elsewhere.

- ★ Morgan sample 56,000
- ★ UK National Readership sample 35,000
- ★ USA MRI sample 26,000
- ★ Germany 26,000
- ★ France 22,800

From: Gary Morgan
Sent: Friday, 16 November 2001 7:00
To: 'mday@ozemail.com.au'
Subject: Article in The Australian Media - "A very costly call"

To: Mark Day
The Australian Newspaper

Dear Mark,

Like anyone, you're obviously entitled to criticise me, my personality and the Morgan Poll.

However, your article in the Thursday, November 15 The Australian Media cannot go unanswered as it is mischievous and misleading - it is important to get the facts right. Given the recent reporting, as fact, of refugee boat people throwing their children overboard - are we to believe every other fact reported in the media is also wrong?

Firstly, your article would have been fairer if you had included our comment:

"There are two possibilities:

- The electorate changed in the last week; or
- The Morgan Poll got it wrong.

At this stage we don't know which is true. We surveyed on election day and, when collated, the results of this Australia-wide Morgan Poll will give us some indication. We will also be re-interviewing respondents surveyed a week before the election to see if they changed their mind in the last week, and if so why."

We will be preparing a full report on those findings when they are available - next week. Until then we can only hypothesise.

Secondly, you know or should know that your statement "the readership measurement contract comes up for renewal" is wrong and misleading. In Australia, there is no industry contract for a national readership survey - it is independent. Roy Morgan Research contracts independently with the publishers, advertising agencies and advertisers. The only other country in the world where there are independent readership surveys is the United States. In the USA it would be illegal for the media to get together and conduct their own readership (measurement) survey. The legality under Australian Trade Practices laws has not been tested. In most instances the industry seeks permission from the ACCC (Australian Competition and Consumer Commission). Hopefully, Prime Minister John Howard and his colleagues in Canberra will ensure the Trade Practices Act in Australia makes it impossible for the media in Australia to own the national readership survey.

If anyone doubts the importance of independence of measurement, they only need to look at the recent Canadian experience. The Canadian Joint Industry body (known as the Print Magazine Bureau) created a new print measurement method which increased the readership of magazines by an average of 140% (ie more than double) and created reader-per-copy estimates of up to 20.

Canadian magazine readership estimates comparing Print Magazine Bureau's new and old methodologies

Magazines	2000	2001	Change
	Through-the-book (old)	Recent Reading (new)	
Healthwatch	842,000	4,949,000	+488%
Canadian Gardening	706,000 (r-p-c 5.0)*	2,842,000 (r-p-c 20.0)	+303
National Post Business	436,000	1,620,000	+272
R.O.B. magazine	397,000	1,326,000	+234
Canadian House and Home	800,000 (r-p-c 4.5)	2,447,000 (r-p-c 13.9)	+206
Toronto Life	341,000 (r-p-c 3.7)	1,034,000 (r-p-c 11.2)	+203
Chatelaine	1,766,000	4,792,000	+171
Reader's Digest	3,168,000	7,929,000	+150
TV Guide	1,865,000	4,284,000	+130
Canadian Living	1,986,000	4,498,000	+126
Homemaker's	1,206,000	2,267,000	+88
Maclean's	1,669,000 (r-p-c 3.3)	3,090,000 (r-p-c 6.1)	+85
Time	1,706,000 (r-p-c 5.4)	3,074,000 (r-p-c 9.7)	+80
Elm Street	710,000	1,010,000	+42
Saturday Night	561,000	794,000	+42

* r-p-c refers to readers-per-copy

Source: Print Measurement Bureau and Audit Bureau of Circulations

While those in the print media in Canada may seek to have the new figures accepted (by claiming the new figures to be correct and the old ones too low), it is important to look at reality.

The table above also shows as an example the calculated readers-per-copy for five of the titles.

It is clear that 20 readers-per-copy for Canadian Gardening is not real; nor is 9.7 readers-per-copy for Time.

If our readership survey were to use the UK "recency" method (as is used in the recent Canadian experiment), then you would expect the reader-per-copy estimate to be lower for newspapers and as shown above significantly higher for some magazines. (This can be seen by comparing Roy Morgan NZ readership estimates with those obtained by Nielsen NZ who use the UK "recency" method.)

For a fuller understanding your readers need to study our paper "Pitfalls of International Market Research" referred to in our recent ARF Workshop paper presented in Chicago, "Single Source - For Increased Advertising Productivity In A Multimedia World".

<http://www.roymorgan.com/international/mediapapers/2001/INT-2001NO1.pdf>

In this paper, we point out that if you compare readers -per-copy estimates across the USA, New Zealand and Australia, you'll see the present USA and NZ readership estimates for many magazines are inflated. Because of this the data cannot realistically be used in any multimedia schedules, ie optimising advertising expenditure in TV and/or radio with magazines and/or newspapers.

We demonstrate this by example by looking at the readers-per-copy of five well-known magazines in three markets (Australia, New Zealand and USA) - using the local readership currency (see table below). A media buyer using this data would believe that magazines are "passed-on" to a lot more people in the USA and NZ than in Australia. For instance, that an average copy of People is read by 9.8 people aged 18+ in the USA, and the same magazine (called Who in Australia and New Zealand) is read by 8.5 people aged 20+ in New Zealand, but only 4.3 people aged 18+ in Australia.

Similarly, that an average copy of Reader's Digest is read by 3.9 people aged 20+ in NZ, 3.4 people aged 18+ in the USA and only 2.4 people aged 18+ in Australia.

Similar differences are shown for Cosmopolitan, TIME and Newsweek (see below).

Readership currency reader-per-copy estimates across countries

Magazine	Australia	New Zealand	USA
	Roy Morgan (18+)	Nielsen (20+)	MRI (18+)
People / Who*	4.3	8.5	9.8
Reader's Digest	2.4	3.9	3.4
Cosmopolitan	3.0	n/a	6.1
TIME	3.4	5.7	5.1
Newsweek/Bulletin ⁺	4.0	Not published	6.1

* In Australia and New Zealand, People is Who

⁺ In Australia, Newsweek is included in The Bulletin

Source: Australia: Roy Morgan Research Jan-Dec 2000, Circulation: Jul-Dec 2000

New Zealand: Nielsen Jul 99-Jun 00, Circulation: Jul-Dec 2000

United States: MRI Fall 2000 Circulation: Jul-Dec 2000

However, the next table below shows that when Roy Morgan Research applies the same measurement methodology across the different countries, the differences all but disappear.

People (or Who) has readers-per-copy, aged 18 and over of 4.3 in Australia, 4.7 in New Zealand, and 4.4 in the USA; and Reader's Digest has readers-per-copy of 2.4, 2.5 and 2.9 respectively. TIME has readers-per-copy aged 18 and over of 3.4 in Australia, 3.7 in New Zealand and 4.3 in the USA. A similar pattern of result is shown for Newsweek with slightly higher readers-per-copy in the USA (5.1) than Australia (4.0).

In other words, when we apply Roy Morgan's consistent proven methodology to different markets on the same magazines, we discover that the magazines attract very similar readers-per-copy despite the marketplace differences. Common sense would say this is correct.

Roy Morgan Research readers-per-copy (18+) estimates across countries

Magazine	Australia (18+)	New Zealand (18+)	USA (18+)
People / Who*	4.3	4.7	4.4
Reader's Digest	2.4	2.5	2.9
Cosmopolitan	3.0	3.5	3.4
TIME	3.4	3.7	4.3
Newsweek/Bulletin ⁺	4.0	Not published	5.1

* In Australia and New Zealand, People is Who * In Australia, Newsweek is included in The Bulletin

Source: Australia: Roy Morgan Research Jan-Dec 2000, Circulation: Jul-Dec 2000

New Zealand: Roy Morgan Research Jan-Dec 2000, Circulation: Jul-Dec 2000

United States: Roy Morgan Research Jul-Nov 2000, Circulation: Jul-Dec 2000

The fact is only when all media are measured by a method which gets realistic audience measurements across different media is it possible for advertising agencies to compute multimedia schedules for buying advertising across media.

The Roy Morgan Readership Survey uses as the "gold" standard full "through-the-book" (for TIME, Bulletin, BRW, some newspaper supplements and magazines inserted in newspapers) and specific issues for monthly publications. This reduces confusion, replication, and telescoping.

In Australia, where the readership survey is independent, and the figures produced by Roy Morgan are believable and consistent, the readership survey is highly regarded.

Criticism is a fundamental element of any independent measurement or audit. The Roy Morgan Readership Survey, like any truly independent measurement, must be and is open to criticism, and questioning. Unlike in the USA, we have a clearly defined embargo period during which all media can review and query the results before they are published. We are answerable to all parties independently.

With the Industry Committee model, once the Committee have agreed - there is little room for querying - and no option to not subscribe.

Changing the readership survey methodology in Australia will result in significant changes in the currency for valuing advertisements in newspapers vs magazines vs TV vs radio. In Canada today if anyone believes the new readership currency, there will be a shift away from advertising in newspapers. Obviously, if Australia followed the Canadian method, there would be a significant decline in the advertising revenue available for newspapers. This is a consequence which I'm sure would not please our mutual friends at News and Fairfax.

The "Doyen of Pollsters"

Finally, it would be wrong not to answer "the doyen of pollsters", Rod Cameron's comment regarding Australians changing their minds in huge numbers - a comment which I agreed with until "border protection", a new euphemism for what used to be called "the race card" in political circles, was played on all Australia's media on the two/three days before the election and again by the Liberals at polling booths. Laurie Oakes' article in this week's Bulletin (with Newsweek) is important - it will concern many people and in particular, our neighbours.

Yours sincerely,

Gary Morgan

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