

The Roy Morgan Research Centre Pty. Ltd.

REF:M:GCM:NZ FTR DEC

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December 15, 1993.

MEMO TO: Buyers of Magazine and Newspaper Advertising Space

FROM: Steve Burns, General Manager

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RE: New Zealand Readership Research

This memo is essential reading for all buyers of magazine and newspaper advertising space. It provides new information on readership. New information based on readership estimates using the "through-the-book" specific issue readership method (the world accepted standard) provides new insights into three critical issues:

- * the inflated New Zealand Woman's Weekly readership estimates due to title confusion between New Zealand Woman's Weekly, Australian Women's Weekly and English Woman's Weekly;
- * the real readership relativities between newspapers and weekly magazines; and
- * multiple insertions in print media are more important than previously thought.

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1. Confusion between different Women's Weekly Publications

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We have, since we began surveying in New Zealand in 1990, been aware of the problem of confusion between the New Zealand Woman's Weekly, Australian Women's Weekly, and English Woman's Weekly.

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Both AGB:McNair and MRS* (using "recency" methods) and to a lesser extent Roy Morgan (using the "first-time-reading" method) estimate significantly higher readers-per-copy for New Zealand Woman's Weekly than for other weekly magazines.

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The Roy Morgan Research Centre has been concerned that the significantly higher r.p.c estimate for the New Zealand Woman's Weekly is not real, but due to title confusion.

The only known and tested method of eliminating such confusion is to use the "through-the-book" specific issue readership method.

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The "through-the-book" method minimises title confusion by showing respondent's specific issues of each magazine and asking them to look through those specific issues "page-by-page".

In September, October and November 1993 Roy Morgan conducted "through-the-book" specific issue experimental research on five weekly magazines (New Zealand Woman's Weekly, Woman's Day, New Idea, TV Guide and Listener). The three other titles (NBR, TIME and Bulletin) normally measured by showing specific issues were also included in the experimental research. The survey covered a New Zealand cross-section of 3,548 men and women aged 14 and over.

* Media Research Services, a joint venture between AGB:McNair and NRB

Comparison of Roy Morgan's "first-time-reading" readership estimates and "through-the-book" readership estimates (See Table 1 below) show:

- Woman's Day, New Idea, TV Guide and Listener "through-the-book" readership estimates to be slightly lower than "first-time-reading" estimates. (This difference may in part be due to seasonal variations), and
- New Zealand Woman's Weekly "through-the-book" readership estimate (14.3%) is significantly lower than obtained by using Roy Morgan's "first-time-read" method (22.2%), or by MRS using the "recency" method (36%).

A comparison of "readers-per-copy" (r.p.c) for New Zealand Woman's Weekly, Woman's Day and New Idea using Roy Morgan's "through-the-book" readership estimates and circulation estimates shows the three magazines have virtually the same number of "readers-per-copy":

- New Zealand Woman's Weekly (2.6 r.p.c), Woman's Day (2.5 r.p.c) and New Idea (2.6 r.p.c).

Conclusion

There is confusion between New Zealand Woman's Weekly, Australian Women's Weekly and English Woman's Weekly. The only way to overcome this confusion is by using the Roy Morgan "through-the-book" specific issue method.

	Total									
	AGB: McNair "Recency" method		Media Research Services (AGB/NRB) "Recency" method		Roy Morgan					
					"First-time-reading" for WW,WD,NI,TVG,L "Through the book" for T,B,NBR				All specific issue "Through the book"	
Magazine circulation estimates# in brackets	Jul'91- Jul'92		Aug'92- Jul'93		Oct'91- Sep'92		Oct'92- Sep'93		Sept,Oct Nov'93	
	%	rpc*	%	rpc	%	rpc*	%	rpc	%	rpc
NZ Woman's Weekly (150,633)	36	6.5	36	6.5	24.0	4.0	22.2	3.9	14.3	2.6
Woman's Day (204,166)	26	4.3	28	4.0	20.2	2.9	21.2	2.8	18.9	2.5
New Idea (103,549)	21	7.1	22	6.0	12.1	3.7	11.9	3.1	9.7	2.6
TV Guide (232,686)	32	3.5	30	3.8	22.1	2.2	20.8	2.4	18.1	2.1
Listener (115,570)	22	4.5	18	4.4	14.2	2.7	13.1	3.0	10.6	2.5
TIME (41,370)	9	6.2	9	6.4	4.6	2.8	4.5	2.9	4.2	2.8
Bulletin (6,000)	NA		NA		0.9	3.8	0.9	4.0	0.7	3.0
NBR (12,083)	4	9.5	4	9.4	2.4	4.9	2.3	5.0	2.4	5.4

Abbreviations: rpc = "Readers-per-copy" Population: RMRC 14+ years 2,638,000 - Sept 92
 NA = Not available RMRC 14+ years 2,680,000 - Sept 93
 # = 6 months ending June 30, 1993. AGB 10+ years 2,895,000 - July 92
 * = Based on circulations 6 months ending June 30, 1992. MRS 10+ years 2,873,000 - July 93

2. The real readership relativities between Newspapers and Weekly Magazines

The availability for the first time in New Zealand of accurate readership figures for weekly magazines (using the "through-the-book" method which is the world accepted standard) has implications not only for weekly magazines but also for daily newspapers and Sunday newspapers.

The MRS (AGB:NRB) method gives r.p.c estimates for Sunday newspapers which are significantly higher than daily newspapers yet significantly lower than weekly magazines. Such unlikely relativities make it virtually impossible to plan print media schedules, combining daily newspapers, Sunday newspapers and weekly magazines.

Table 2 below compares readership estimates for daily newspapers and Sunday newspapers produced by Roy Morgan and MRS (AGB:NRB).

Newspaper circulation estimates 6 months ending June 30, 1993 in brackets	MRS (AGB:NRB)		Roy Morgan			
	Aug'92-Jul'93		Oct'91-Sep'92		Oct'92-Sep'93	
	Population 10+ years		Population 14+ years		Population 14+ years	
	%	rpc	%	rpc*	%	rpc
New Zealand Herald (Auckland) (246,092)	21%	2.5	22.3%	2.4	23.6%	2.6
Dominion (Wellington) (66,009)	7%	3.0	7.5%	2.9	6.6%	2.7
Evening Post (Wellington) (71,092)	6%	2.4	7.0%	2.5	6.7%	2.5
Christchurch Press (102,066)	9%	2.5	8.8%	2.3	8.5%	2.2
Sunday News (Auckland) (135,527)	17%	3.5	13.0%	2.5	13.2%	2.6
Sunday Star (Auckland) (101,321)	11%	3.0	10.0%	2.6	9.4%	2.5
Dominion Sunday Times (Wellington) (61,728)	9%	4.1	6.4%	2.3	5.3%	2.3

Population: RMRC 14+ years 2,638,000 - Sept 92
 RMRC 14+ years 2,666,000 - Sept 93
 MRS 10+ years 2,873,000 - July 93

* Based on circulations 6 months ending June 30, 1992

It shows the Roy Morgan method of surveying newspapers gives r.p.c estimates for daily newspapers which are similar (ranging from 2.2 to 2.7) to Sunday newspapers and weekly magazines using Roy Morgan's "through-the-book" method.

Conclusion

The Roy Morgan "through-the-book" specific issue experimental survey in conjunction with accurate Roy Morgan newspaper readership figures makes it possible for the first time in New Zealand to plan print media schedules combining daily newspapers, Sunday newspapers and weekly magazines.

3. Re: Print Media Schedules

Some publishers have viewed the lower, albeit more accurate, readership levels with some concern.

However, lower readership levels are not the full story. Advertising campaigns are never based on just one advertisement, they are always based on multiple insertions.

Just as the "through-the-book" specific issue method is the world accepted standard for readership measurement, so "re-interviewing" rather than "single interview recall" is the accepted standard for measuring audience accumulation.

Roy Morgan readership frequency distributions are based on "re-interviewing" respondents to accurately measure audience accumulation. This results in "higher" readership "turnover" rates for newspapers and magazines than the "single" interview frequency distributions obtained by AGB:McNair and MRS.

With Roy Morgan readership data the most cost efficient optimal reach is achieved by using multiple insertions in newspapers and magazines.

Overall, while Roy Morgan "first" issue readership reach estimates are lower for all magazines than those obtained by AGB:McNair and MRS. However, Roy Morgan schedules with multiple insertions across a range of magazines can accumulate to similar levels.

Conclusion

Using Roy Morgan readership estimates instead of MRS readership estimates will result in schedules recommending relatively more insertions for daily newspapers and weekly magazines (except New Zealand Woman's Weekly) while fewer insertions for New Zealand Woman's Weekly and some monthly magazines.

Table 1: Analysed by Men and Women

Magazine circulation estimates/ in brackets		New Zealand Readership Results																	
		Total						Women						Men					
		AGB: McNair "Recency" method		Media Research Services (AGB/NRB) "Recency" method		Roy Morgan		AGB: McNair "Recency" method		Media Research Services (AGB/NRB) "Recency" method		Roy Morgan		AGB: McNair "Recency" method		Media Research Services (AGB/NRB) "Recency" method		Roy Morgan	
		Jul'91-Jul'92	Aug'92-Jul'93	Oct'91-Sep'92	Oct'92-Sep'93	Oct'91-Sep'92	Oct'92-Sep'93	Jul'91-Jul'92	Aug'92-Jul'93	Oct'91-Sep'92	Oct'92-Sep'93	Jul'91-Jul'92	Aug'92-Jul'93	Oct'91-Sep'92	Oct'92-Sep'93	Jul'91-Jul'92	Aug'92-Jul'93	Oct'91-Sep'92	Oct'92-Sep'93
	%	rpc*	%	rpc	%	rpc	%	rpc	%	rpc	%	rpc	%	rpc	%	rpc	%	rpc	
NZ Womens Weekly (150,633)	36	36	24.0	22.2	14.3	2.6	45	44	32.0	29.0	18.5	27	27	15.7	15.0	9.9	9.9		
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TIME (41,370)	9	9	4.6	4.5	4.2	2.8	7	7	3.4	3.0	2.7	11	11	5.8	6.1	5.8	5.8		
Bulletin (6,000)	NA	NA	0.9	0.9	0.7	3.0	NA	NA	0.6	0.5	0.3	NA	NA	1.2	1.3	1.0	1.0		
NBR (12,083)	4	4	2.4	2.3	2.4	5.4	2	2	1.4	1.1	1.3	6	6	3.5	3.5	3.5	3.5		

Abbreviations: rpc = "Readers-per-copy"
 NA = Not available
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Population:
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