

1.11 Media research in the Republic of Ireland

The introduction to this paper provides a brief summary of early developments in media research in Ireland,* and then presents a detailed description of the only single source document on media coverage; the Joint National Media Research Survey (JNMR), which has been conducted continuously since 1972 by Irish Marketing Surveys Limited.

In regard to media in Ireland, the national broadcasting organisation, Radio Telefis Eireann, established a local television station in 1961 and now provides two television and two radio channels, both of which are commercial. The second television channel was introduced in November 1978 and the second radio channel in May 1979. The national press is represented by four morning, three evening, and five Sunday newspapers, while the provincial press comprises 53 community newspapers (most published weekly). There is a wide range of magazines, and a healthy cinema audience. In addition, the main TV, radio, press and magazine media from the UK have varying degrees of penetration in Ireland.

EARLY DAYS OF MEDIA RESEARCH

The first national media research project in Ireland occurred in 1958 when the local advertising agencies collectively sponsored a study of the press media. This first attempt to produce a definitive guide to Irish media coverage was superseded in quick succession by a survey commissioned by Independent Newspapers Limited in 1961, and two separate studies the following year – one from the Irish Press Group, and the other from the *Cork Examiner*. Two years later, in 1963, the Creation Group also produced a readership survey.

These various partisan contributions to media research, and increasing sophistication at media planning level, led to a joint sponsorship project with the four newspaper groups – Independent Newspapers, the Irish Press Group, the *Irish Times* and the *Cork Examiner* – coming together to fund a study entitled 'The National Readership Survey in Ireland 1968'. This survey was based on a multi-stage probability sample of 2656 households, yielded successful interviews with 6811 individuals aged

15 and over, and was, in a sense, the harbinger of the JNMR survey; it nevertheless took over three years for the JNMR project to see the light of day. A committee representing all interested parties was set up and a research brief was formulated which effectively served as a blueprint for the JNMR survey with relatively few modifications. The initial three year contract was awarded to Irish Marketing Surveys Limited (in 1972) and they have conducted the initial and subsequent surveys since then.

At the planning stage, an examination of the current techniques led to a decision to model the JNMR survey on JICNARS in the UK. Considerable debate was also generated by a decision on whether or not to include UK media (a suggestion contained in the original briefing document). Finally, it was decided by the Users Committee who represent the sponsors of the survey to confine the research to Irish media.

SUMMARY OF CURRENT PRACTICE

The JNMR survey is based on a sample which is designed to be representative of the adult population (aged 15 and over) living in the Republic of Ireland. Results are published annually at the end of September, and each report comprises two volumes which present data based on the preceding 12 month period from 1 July to 30 June. This timetable was originally adopted to allow direct comparisons to be made with Audited Bureau of Circulation figures.

The survey is based on a multistage probability sample of private households and institutions in the Republic of Ireland, within which individuals are selected for interview by application of a 'Kish' selection procedure (based on those aged 15 and over). From an initial contact sample of 6000 names and addresses, effective interviews are completed with at least 5000 respondents, and this fieldwork success rate (interviews from contacts) has been maintained at a consistently high level of well over 80% since inception.

The JNMR survey measures readership of the national daily, evening, Sunday and provincial newspapers, and weekly and monthly consumer magazines. Television viewing is covered by size and nature of the audience and intensity of viewing. The radio data establish listening by day of week and within quarter hour segments for each day. For cinema, frequency and recency of attendance is also provided.

Both volumes of the JNMR survey report present

* Where the term Ireland is used throughout this report, it is meant to refer to the Republic of Ireland unless otherwise specifically stated.

tabular data in which all bases are shown in unweighted and weighted form. The unweighted figures indicate the actual number of people interviewed, and in each case this is also weighted up to a population estimate for the mid-point (January) of the 12 month survey period. The tabular results contained within each table are shown in percentage and raw data form, with the latter figures based on the weighted sample.

Within each survey period, interviewing is carried out continuously throughout the year on every day of the week except Sunday: Monday interviews are equally divided to provide Saturday and Sunday radio listenership levels (but the report only presents Sunday radio data for Radio 2, as Radio 1 does not feature commercial breaks on that day).

Volume one of the JNMR report contains basic media coverage information analysed separately by adults, men, women and housewives with a full demographic breakdown within each of these four groupings (ie marital status, age, social class, region, and area type). This is followed by detailed demographic profiles for each medium, analysed separately for adults and housewives. The final section of volume one incorporates intermedia duplication data and this is shown separately for adults, men, women and housewives.

Volume two commences with the basic media coverage information crossanalysed by a wide range of general market data (for adults, men, women and housewives separately) and this is followed by the same general market data crossanalysed by basic population demographics. The final section of volume two include reading probabilities for newspapers and magazines, and a technical appendix which details the sample design definitions of terms and sampling points and includes a copy of the survey questionnaire.

Since the first full JNMR report for the period 1972/73, the number of subscriber organisations has almost doubled, and in addition to change on the press media front, the survey has also been modified to accommodate the recently introduced second national television and radio channels.

JNMR – administration

Prior to the initiation of the JNMR survey, the committee of interested parties drew up a formal constitution under the title 'The Joint National Media Research Users Committee'. This committee is composed of one representative drawn from each of the subscriber organisations and a representative from Irish Marketing Surveys Limited.

The total research cost for the most recent research period of 1979/80 was £49,000 with the national press and RTE carrying the major burden and relatively modest contributions made by respective representative bodies

for the advertisers and advertising agencies.

Copyright of all JNMR survey reports is vested in Irish Marketing Surveys on behalf of the Users' Committee.

JNMR – sample design (see also Appendix 'B')

The sample design for the JNMR survey comprises three stages. The first involves the selection of 300 primary sampling units which are defined in terms of district electoral divisions, individual wards (within these) or groups of wards. The second stage involves the selection of 6000 names and addresses of electors which are drawn from the electoral register from within these 300 primary sampling units. The third and final stage requires the application of a formal Kish selection procedure to identify the individual for interview at each selected address. Information relating to the household may be taken from any member, but if the selected respondent is not available at the first call, the interviewer is required to make at least two further calls on different days (and at different times of the day) before recording the interview as unsuccessful (in all such cases the reason for failure must be identified, eg unable to trace, refusal, on holiday, etc).

The JNMR survey also covers individuals selected for interview from institutions, which account for approximately 3% of the total adult population. For such addresses, the interview establishes contact with and obtains an interview from the individual listed in the electoral register. If that individual proves to be unavailable, the interviewer may then make a substitute interview with an individual of similar demographic characteristics at the address (such interviews do not include questions on household durables).

JNMR – media measures

The basic techniques for measuring readership, radio listening, and television viewing in the JNMR survey are modelled directly on those used by JICNARS in the United Kingdom. However, it may be helpful to outline briefly the measures used for each medium.

READERSHIP

The basic technique used to measure readership is the establishment of reading frequency for the publications covered. In practice, the interviewer presents the respondent with a series of mastheads for the relevant publications, each of which is accompanied with an appropriate frequency scale. In the case of a daily newspaper, informants are asked to indicate how many issues they 'read or looked at' in an average week, and the scale runs from six to one and also includes a facility for 'less than one', or 'none'. For a Sunday newspaper or other weekly publication, the relevant frequency scale runs from four to one and responses are related to the

number of issues read or looked at in an average month.

Thus the technique establishes whether or not a person has read or looked at any copy of the publication in question during a period back from the day of interview, which equals the interval at which the periodical is published (reading on the actual day of interview is not included).

The actual questioning sequence involves taking the respondent through a booklet of mastheads to establish a frequency of reading for each. All who claim to have read or looked at a publication with a frequency greater than 'none' are then asked the average issue readership question which is phrased as follows: 'When is the last time you read or looked at a copy of?' This question is amplified in terms of explaining that the phrase 'read or looked at' means -- 'It doesn't matter where' and can relate to 'any copy'.

The masthead booklet used to establish reading frequency consists of black and white photographic reproductions of the mastheads of each publication covered by the survey. A two-way rotation of the order of listing publications is used with half the booklets presenting publications within each group in reverse order. The sequence of each group of publications (monthlies, fortnightlies, weeklies, etc) is consistent with the least frequent publication group coming first followed by the next most frequent set, etc. The allocation of booklets is systematically allocated to obviate bias.

Titles covered

One interesting feature of the Irish media scene is that the per capita 'consumption' of Sunday newspapers in the Republic -- including British imports -- is approximately twice that recorded in the UK (the figure for dailies is more or less similar). The 1980/81 JNMR covered the following press titles:

- (a) DAILIES -- *Irish Independent, Irish Press, Irish Times, Cork Examiner.*
- (b) EVENINGS -- *Evening Press, Evening Herald, Evening Echo (Cork).*
- (c) SUNDAYS -- *Sunday Independent, Sunday Press, Sunday World, Sunday Journal.*
- (d) WEEKLIES -- *Irish Farmers Journal, Irish Weekly Examiner, RTE Guide.*
- (e) PROVINCIALS -- Weekly (Consolidated in a group of 49 titles).
- (f) MAGAZINES (Weekly) -- *Business & Finance, Irish Field, Womans Way.*
- (g) MAGAZINES (Monthly) -- *Image, Magill, Irish Farmers Monthly, The Farmer, Gaelic World.*

RADIO LISTENING BEHAVIOUR

The JNMR techniques for measuring radio listenership represent a development from procedures followed in the

earlier series of *ad hoc* surveys commissioned by Radio Telefis Eireann. The basic principle involves asking all respondents to indicate whether or not they listened to 'RTE 1' or 'RTE 2' at any time during the day prior to interview; it is explained that this may be at home, in a car, in someone else's home, or at work. All listeners are then shown a schedule of RTE radio programmes for both channels and asked if they were listening to any part of any programme on that day.

The questionnaire provides for identifying a wide span of time slots for the period 6.30 am through to 1.30 am. These time slots take the form of 15 minute or 30 minute segments, and a listener to these time slots is defined in the following terms -- for a 15 minute period those listening to eight minutes or more qualify, and for a 30 minute segment those listening to 16 minutes or more qualify. This measurement also covers Sunday listening by dividing Monday interviews equally in terms of asking about either Saturday or Sunday.

In addition to the measurement of listening within specific time segments, a number of specific time/programme slots on both RTE radio 1 and 2 are also covered by a separate question which asks respondents to indicate on how many weekdays prior to interview they listened to these slots (Monday to Friday).

TELEVISION VIEWING BEHAVIOUR

Like the radio listening questions, the JNMR measures of television viewing have also been adapted to incorporate a second national channel. The television question sequence involves four basic measurements as follows:

- (a) number of days per week on which television is viewed.
- (b) average number of hours spent viewing television.
- (c) number of hours out of ten hours viewing, spent watching each of the channels.
- (d) recency of viewing for each of the channels.

The latter two measurements are related to the six separate television channels which do not all enjoy full national coverage. They are RTE 1, RTE 2, BBC 1, BBC 2, UTV and HTV (ie, 48% of the TV households in the Republic of Ireland can receive one or more of the UK/Northern Ireland BBC or ITV stations).

The viewing intensity of RTE 1 and RTE 2 television viewers is also calculated by using the first three measures to establish the number of hours each respondent spends watching RTE 1 and RTE 2 in an average week. As a result, all survey respondents are classified on the following basis: non RTE viewers; light viewers of RTE 1 or 2 (up to five hours per week); medium viewers of RTE 1 or 2 (over five hours but less than 17 hours per week); and heavy viewers of RTE 1 or 2 (17 hours or more per week).

As a result of the original decision to exclude UK media, the JNMR report does not identify the BBC or

independent television channels separately, but they are grouped together as 'all others' for the viewed yesterday figures.

JNMR – market information

The amount of general market information *vis-à-vis* media data has always been significantly higher on the JNMR survey than on JICNARS. The current questionnaire for 1980/81 comprises 12 pages; five are devoted to media information, 4.5 to general market information, and 2.5 to classification and respondent selection procedure. By comparison, the NRS questionnaire consists of 13 pages of which 8.5 are devoted to media, 1.5 to general market information and three to classification and selection.

Traditionally the second volume of the JNMR report has provided a crossanalysis of basic media data with this general market information (termed special interest groups, or SIG's). In the 1979/80 report, this general market information spans a total of 105 separate subgroupings under a wide variety of headings. These include basic services to the home, cooking methods, ownership of electrical appliances, television ownership and type, radio ownership and type, main heating method, use of central heating, house type and tenure, home improvements, use of financial institutions, level of education, holidays, motoring, vehicle ownership, drinking patterns, alcohol (including specifically spirits, beer, wine and aperitifs), soft drinks, cigarettes, cigars and pipes, cosmetics/toiletries, grocery shopping, paint, carpets, eating out, and animal feeds.

A recent advance in the JNMR reporting format has been the incorporation of this general market information crossanalysed by population demographics. Thus, the report contains a unique and highly informative range of up-to-date information on most of the major consumer markets, in penetration and profile terms.

ANALYSIS AND PROCESSING

Interviewing for each year's survey takes place between the months of July and June inclusive, the contractual obligation on IMS's part is to produce the report for this period by the end of September each year. The intervening three month period is taken up with analysis and processing.

Editing and quality checks are carried out continuously throughout the survey period, and this involves partial manual editing of each questionnaire, a 20% postal check on respondents, and a continuous rota of personal back-checks on interviewers. When the first six months' data are available a full programme of computer edits is carried out, and any inconsistencies in the data are reported back to IMS so that reference can be

made to the appropriate questionnaire. These data are punched on to cards by a local bureau and thus the second six months data for each year are available towards the end of July. At this stage analysis specifications will have been sent to the computer processing bureau and the various weighting stages are then completed.

Stage 1 weighting – area

In this first stage, all survey data are weighted to allow for the imbalance in the sample design resulting from the oversampling of the (eight) urban sampling stations; it also corrects for differential response levels between each of the 12 sampling stations. (See Appendix 'B').

Stage 2 weighting – probability of selection

The relative probability of selection for any one individual for interview is equal to the number of names in the register leading to that household, divided by the number of eligible adults (15+) in that household. Thus, it is necessary to apply a corrective weight factor (to each individual) which is equivalent to the number of eligible adults divided by the number of names in the register. In the case of institutions where the interview is sought with the selected individual, the weight factor is simply one.

Stage 3 weighting – population estimates

This is based on a 144-cell matrix – men, housewives and other women, within eight regions crossanalysed by six age groupings. This matrix is then compared with the most up-to-date universe data and corrective weights applied where necessary. (The sample is also balanced within two-monthly periods and by day of week.)

JNMR – FUTURE DEVELOPMENTS

From this paper, it will be clear that the JNMR survey has altered little in terms of technique or format since it commenced in 1972. This is not to suggest that the Users Committee which funds the project is reluctant to consider change; quite the opposite applies. The Committee participates in EMRO – the European Media Research Organisations' group – and sends a delegate to each annual conference. This ensures that the Committee is kept abreast of current practices, particular problems, and experimental and development work taking place in other countries. Because the JNMR is based closely on the JICNARS survey in the UK, particular attention is paid to exploratory work there.

One major change, currently under review, is the notion to produce a half-yearly summary report (providing topline data). This possibility has been formally raised and considered on a number of occasions in recent years due

to concern on the part of media planners about the yearly schedule of reporting. Most recently, the national broadcasting authority, RTE, raised the issue in relation to radio programme planning. This initiative has received a sympathetic hearing by the Users Committee which may lead to an official six-monthly interim report.

APPENDIX 'A'

The original sponsors of the first Joint National Media Research survey were: Independent Newspapers Limited; Irish Press Limited; Irish Times Limited; Thomas Crosbie & Company Limited; Creation Group Limited; Radio Telefis Eireann; Provincial Newspapers Association; Agricultural Trust; Cinema & General Publicity Limited; Institute of Advertising Practitioners in Ireland; and Association of Advertisers in Ireland.

With the exception of the Creation Group, all of these sponsors are still involved, and since 1972 they have been joined by: Belenos Publications Limited; Image Publications Limited; Irish Farmers Monthly; JS Publications Limited; Magill Publications Limited; Rank Screen Advertising; and Sunday Newspapers Limited.

APPENDIX 'B'

The master sampling frame uses a basic stratification by regional definitions, further stratified by area type and (in some cases) rateable valuation areas. This provides a total of twelve sampling stations, of which the eight urban ones are deliberately oversampled, the imbalance being corrected by weighting the rural interviews at the analysis stage.