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A REVIEW OF CHANGES SINCE MONTREAL

INTRODUCTION

As at the two preceding Symposia at New Orleans in 1981 and at Montreal in 1983, delegates at this third Symposium at Salzburg were again presented with the *Summary of Current Readership Research*. The 'Summary' attempts to give a detailed picture of the different readership survey practices employed around the world, by presenting the many methodological details in a matrix form which allows easy reference and hopefully makes comparisons easy. All details are given in English, based on the contributions by our correspondents for whose co-operation we should like to express again our thanks. In the following, we would like to highlight three things: firstly to point to the newly extended coverage of the updated 'Summary', secondly to summarise the changes of methodological details we noticed and which we interpreted to represent perhaps methodological trends, and thirdly we should like to give seven examples of developments taking place in various countries since Montreal, as they were reported to us by our correspondents. Many of these developments are, of course, the subjects of presentations later at the Symposium.

SURVEYS COVERED

The 'Summary' includes national total audience readership surveys. This definition excludes surveys which are designed to cover specialised markets (eg businessman surveys) but naturally includes surveys which cover other media with equal importance, or whose readership section is perhaps of secondary importance. The 'Summary' produced for Montreal 1983 covered 32 surveys in 24 countries; the updated

'Summary' now covers 39 surveys in 28 countries. The seven surveys included for the first time are three from Austria (our host country this year), The Indian National Readership Survey, two surveys from Japan, and the Media Panel from Turkey.

Of the three Austrian surveys, one - the MA - is organised by a committee of publishers and advertising agencies, the other two are privately run surveys of the IMAS institute. All three employ personal interviews with relative large sample sizes of 12,000 (MA and ROLLMA) and 6,000 (ÖVA). The sample size reported from India for the third National Readership Survey is a massive 54,392 - but this is still short of the the sample size reported for one of the Japanese surveys - the MMR - which claims 60,000 (the other Japanese survey - the ACR - has 9,600 interviews). The Indian survey which employs personal interviews in urban areas of India is run on the lines of the British pre-EML NRS; both Japanese surveys are conducted by mail. The survey now included from Turkey is conducted by personal interviews amongst a sample of 3,000 in urban areas of Turkey. Turkey has a starting age limit of 19, the oldest eligible age of all 39 surveys in the 'Summary'.

ADDITIONAL INFORMATION

For users of the 'Summary' who wish to consult the 'Marketing Data' section, an attempt has been made to include more detail than previously given. For those who wish to ask the survey organisations for more information directly, a contact directory now added to the 'Summary' as Section VII, gives addresses, telephone numbers, telex numbers (if available) and names of persons to contact.

WHAT'S NEW - TRENDS

Comparing the 1983 details of the 'Summary' with the 1985 update, we noted certain developments which we put under the following seven headings: sample sizes, number of titles covered, other media, screening questions, frequency questions, recency questions, and qualitative readership data. We should like to comment on these in turn.

LARGER SAMPLES

There is a trend for larger sample sizes in some countries. We do not know the reasons for the expansions in each case, but suspect that the wish to provide greater analysis facilities plays the most important part. In Denmark, for example, regional newspapers are provided with separate reports, each needing sufficient sampling bases.

It might be of interest to note that the sum of sample sizes of the 39 surveys in our 'Summary' amounts to approximately 750,000 interviews taken worldwide per annum. This is a tiny proportion of all market research activity, but as far as individual surveys go, each sample is comparatively large.

TITLES COVERED

There were 32 surveys common to the 1983 and 1985 summaries. Only one reports to have reduced substantially the number of publications which informants are asked about. This is the replacement survey of the NOP in The Netherlands, now called NMO. NOP's media list per informant was 145, NMO's is 79. Most other surveys increased their media lists per informant, making the new average over all common surveys 105 titles per informant compared with 90 in 1983. (Some surveys which seem to have reduced their lists compared with 1983 are not included in this calculation, because we deduced that

the 1983 figures reported were in fact representing the total number of titles *on the survey* as opposed to total number of titles individual informants are asked about. The latter is what we aim to describe.)

OTHER MEDIA

Our evidence for the statement that other media seem increasingly important is that more surveys than before now cover outdoor media (including posters, but also transport), and the fact that intermedia comparisons and how to create databases to make comparisons possible, are quoted as recent developments by many of our correspondents. The surveys covering outdoor are found in Canada, Denmark, Hong Kong, South Africa (new), Sweden, Thailand (new), and USA's Simmons surveys. Belgium, Denmark, and Japan all mention specifically growing interest in linking print media data with electronic media data, but we know that these interests are shared by researchers in other countries, notably in France and in Germany.

SCREENING QUESTIONS

Three countries can be singled out because of a change in the screening question they made between Montreal and Salzburg. In all three cases it was a change to extend the eligible period in which readership occurred. In Denmark, where there was no filter question previously, now a filter defined by the 12-issue period of publication is used. In Finland a change was made from a six-issue period filter to a 'ever read' filter. And in the UK, the National Readership Survey which previously employed various filter periods according to the publication interval of the publication concerned (eg reading in average week for dailies, average month for weeklies, past six months for monthlies) now employs a common 'past year' reading filter for all publications.

FREQUENCY QUESTIONS

Most surveys in our 'Summary' employ a numeric scale for their frequency of reading questions. It is therefore notable that three surveys which report change to their frequency scales favour verbal frequency descriptions or mixed verbal/numeric scales. These are the German Allensbacher Werbeträger-Analyse which now has a seven-point purely verbal scale (previously there were five and seven verbal scale points with numeric explanations), Sweden which changed from a 15-points numeric scale to a seven-point mixed verbal/numeric scale, and the UK NRS which changed from six or seven-point numeric scales, depending on publication group, to a four-point verbal scale with numeric explanations which is now common to all publication groups.

REGENCY QUESTIONS

The 'recency method' of measuring readership of the average issue of a publication is used in most countries, but with various ways of asking about and recording the recency. We defined as 'direct' recency questions those which disclose to informants the time periods precoded on the questionnaire; as 'indirect' those which let the informant state the 'when last' time, and the interviewer to code accordingly on the questionnaire, ie the precodes are hidden from the informant. Most surveys use either one or the other of these methods. Further variations are in the number of scale positions, and the number of qualifying positions for each publication group. Perhaps as an indication of an increasing awareness that differential treatment might be necessary to achieve best results, we found that two surveys have changed their recency questions since Montreal. The AWA '85 from Germany now employs different questioning methods for newspapers and magazines - the direct method for magazines, the indirect method for newspapers, and the UK NRS has a common five-point extended recency scale whereby the first two

positions ('yesterday' and 'past 7 days') are obtained by 'direct' questions, while for 'past 4 weeks', 'past 3 months', and 'longer ago' positions an 'indirect' questioning method is used.

QUALITATIVE DATA

More surveys than at the time of Montreal now report the inclusion of qualitative reading questions within their questionnaires. In addition to already existing measures, or as completely new questions, five countries can be singled out as having new qualitative data: Germany's AWA has a new reader involvement measure, The Netherlands' NIPO survey includes ratings and advertising exposure measures, New Zealand's survey a 'time spent' question, UK's NRS 'source of copy' and 'age of issue' questions, and USA's Mediamark survey new advertising exposure and rating measures.

NEW DEVELOPMENTS SINCE MONTREAL

In order to familiarise readers of these Proceedings with the developments which have taken place since the Montreal Symposium, we should like to mention as examples the developments reported from six countries: these are Belgium, Germany, India, The Netherlands, UK, and USA.

Example 1 - Belgium

Our Belgian correspondent reports developments in the area of creating multi-media product databases, covering press, TV, radio, outdoor and cinema. This seems to us an area of development not only in Belgium, but many other countries too. For instance, Germany, France and The Netherlands are countries in which such developments have been progressed.

Example 2 - Germany (AWA)

The German AWA reports an increase in the number of sampling points from 594

to 820, an increase in the list of publications from 131 to 188, and changes to the frequency and recency questions, as already mentioned.

Example 3 - Germany (MA)

For the German Media Analyse extensive experiments between 1973 and 1983 resulted in the following decisions implemented for MA '85: the masthead cards were reduced by half, there was no change in their filter questions, there was no change in the number of answer categories for frequency and recency questions, but there was a change in the sequence of questioning; hurdle, then time-filter questions are both asked vertically, and for publications passing the filter, frequency and recency questions are now asked horizontally.

Example 4 - India

Following the developments in the UK, an experiment using the grouped titles method - also known as EML (Extended Media List) - has been conducted in India. The results have been reported in Session 3 of this Symposium.

Example 5 - The Netherlands

The developments in The Netherlands are, from the outsider's point of view, fairly involved: indicative of the changing scene in media research seem to us the fact that the National

Readership Survey NOP has been replaced by a new survey - NMO. From a technical angle, the most dramatic change seems to be the reduction of the media list from 145 to 79. Then there is also a new National Media Survey called SUMMO under discussion.

Example 6 - UK (National Readership Survey)

That the UK NRS has changed its method is probably little news to any delegate at this Symposium, and there will be many references to it in these proceedings. To summarise the facts, this is what has happened: there is a media list increase from circa 110 titles previously to now circa 200, there are now publication cards grouping titles in typescript form (not as mastheads), there is a new past year filter common for all titles, there is a new verbal frequency scale common for all, a new extended recency scale common for all with mixed direct/indirect questioning, and there is the addition of qualitative reading data (age of issue and source of copy).

Example 7 - USA

In the USA, discussions and experiments there concerned page exposures, the Through-the-Book versus Recent Reading method, and the appropriateness of the newspaper reading measurements - how weekend reading compares with weekday reading.