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DEVELOPMENTS IN THE UK

My task here is to give a brief report on the recent activities of JICNARS in the UK and to describe the progress we have made in implementing the plans which Peter Todd, Chairman of JICNARS Technical Sub-Committee, outlined in his address to the Montreal Symposium two years ago.

During his updating report he described JICNARS plans for extending the list of titles measured by the National Readership Survey from the approximately 120 newspapers and magazines traditionally measured so as to include many of the new titles which had established themselves into important, and sometimes new, media groups.

The methodology favoured by JICNARS Technical advisors was outlined at the Montreal Symposium and represented a complete change from the previous questionnaire and logo books which JICNARS had employed for many years. The new method introduced a 'grouped titles' approach, following lessons learned from a pilot study carried out by RSL in 1982.

The initial problem for JICNARS management was to secure agreement of all parties concerned to abandon the 'old' NRS and to proceed with a full-scale application of the new questionnaire and card technique from January 1984.

The more orthodox process of running the two surveys in parallel might have been more desirable but there were problems, not the least of which was the very high cost factor.

It was therefore decided that sound arguments existed for taking the plunge and declaring 1984 a year of EML experiment. (For convenience the new technique quickly became known as the Extended Media List or EML.)

The decision to take our courage in both hands was based on 3 main factors:

(1) The pilot results and subsequent analysis and development work gave us confidence that the new method could cope with the additional titles and would provide readership estimates at generally acceptable levels.

(2) To have conducted two surveys in parallel would have created an impossible division between publishers who might perceive themselves disadvantaged or advantaged by the adoption of EML data.

(3) Parallel surveys would produce enormous problems for the Contractor's field forces. Interviewers and supervisors find it difficult enough to change from one interview method to another without having to operate both at the same time.

In the event, the Technical Sub-Committee recommendation, based upon the detailed work of the EML Technical Study Group under the Chairmanship of Brian Allt, was accepted by the Publisher contributors of the Press Research Council (not without considerable discussion, I might add) provided that:

(1) An Ombudsman be appointed to give an independent appraisal of the first two quarters' results. We were fortunate in being able to retain the services of a highly regarded expert, John Bermingham, for this task.

(2) That no data would be published until his report had been considered by JICNARS and the PRC.

(3) That because 1984 had been designated a year of experimentation it should also mark a complete break with past NRS reports and therefore publishers should not claim readership gains or losses by comparing EML results with those for earlier years produced by a different method.

With very few, but notable, exceptions, this formula proved successful in

accommodating the need for radical change to bring the NRS into line with contemporary market demands while adhering to a strictly limited budget. Later in the Symposium James Rothman, who was appointed Director of JICNARS in 1984, will describe in greater detail some of the technical problems we had to face and, indeed, still face.

The work of refining the EML technique must obviously be a continuing task and the original EML Technical Study Group which worked so hard to bring about this very significant development in readership research in the UK has been renamed the Main Survey Experimentation TSG and is still, I'm glad to say, under the Chairmanship of Brian Allt. Like all the TSG's, this reports to the Chairman, Technical Sub-Committee - Peter Todd, whose valuable contributions to all our work I gratefully acknowledge.

JICNARS has now produced three reports based on EML data. The first was an interim six-monthly report for the period January-June 1984, and the second, covering the full year January-December 1984, appeared in March 1985. We shall continue with our normal practice of reporting every six months giving data for the 12 preceding months, and our third report covering July 1984-June 1985 was published in August.

To summarise what has been, for some of us, a traumatic experience, I feel I may claim that we have achieved what we set out to do.

(1) JICNARS now measures some 200 titles and is able to provide better comparative data in a number of publishing groups where successful new titles are changing media choice and opportunity.

Many of these groups, as you would expect, cover leisure interests such as motoring, yachting, fishing, golf, gardening, music, etc but others cover new areas of publishing to more narrowly targeted audiences among women

like hair and beauty, health, etc and among young people - pop music and youth interest titles. Many of these new magazines are enjoying spectacular success in circulation terms and reflect the increasing tempo of the UK publishing industry.

(2) The NRS publications list has now greater flexibility and, while I would not claim that our ability to add titles is limitless, with intelligent restraint and some judicious pruning we should be able to handle the promised flood of new titles currently heralded in our Trade Press. So we may fairly claim that EML has loosened the confines of the traditional NRS straightjacket.

(3) As is reported by James Rothman, there is general approval amongst advertiser and agency media experts for the considerable improvement in the stability of the data produced under EML which has succeeded in largely removing the old bugbear rotation effect and title confusion.

(4) In the process, a few publications have had to adjust to changed readership levels and this has naturally caused considerable controversy and provided the Trade Press with excellent copy. I fully understand the feelings of publishers faced with an apparent decline in the traditionally accepted market value of their titles.

JICNARS, for its part, has been the first to examine areas of possible technical weakness and has already made changes to card length for example. Changes of readership levels are inevitable where there has traditionally been an element of title confusion in a dynamic market. It is, I fear, the price we have to pay for change and hopefully in the long run, the general recognition and acceptance of real technical improvement.

JICNARS has, of course, other technical concerns beyond EML which are under active examination by a series of

Technical Study Groups. One such group, established in 1982, has made considerable progress in the analysis of the benefits, or otherwise, of diary panels in the field of newspaper and magazine readership research. It has recently issued a report and its Chairman, Roger Beeson, has a paper on this subject later in this Symposium.

A TSG studying the 'Meaning of reading' is about to publish a paper. This Group under the Chairmanship of Alan Smith has confirmed that from their viewpoint the results published by JICNARS are satisfactory and that, if anything, they tended to

underestimate. Two other TSG's under the Chairmanship of Michael Ryan and Dick Dodson are examining the areas of special interest questions and other media and the questionnaire has already been revised to take account of their recommendations.

The introduction of change into a highly competitive market place is a notoriously thankless task so I should like to pay public tribute to Brian Allt and his EML team, the Technical Sub-Committee, RSL and to JICNARS Director and indeed to all who worked so hard and steadfastly to help us to take this significant step forward.