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## YESTERDAY – TOMORROW

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This is the fourth Readership Research Symposium and it will probably be the last to be held in this decade. The first Symposium was convened in New Orleans in February 1981 but the idea was conceived by BMRB and RSL in the Spring of 1980. So the four Symposia have straddled the whole of the 1980s and in this opening address I think it is appropriate to review the progress we have made:

Why was the first Symposium organised in the first place?

What have we learnt from each other and what problems have we solved – and what problems remain unresolved?

What can one foresee for the next decade and how well organised are we to respond to the challenges of the 1990s?

In a note from the sponsors included in the published volume of the proceedings of the New Orleans Symposium they said:

“What we envisaged was a conference which would bring together top media researchers from every part of the world to remind ourselves of the different techniques we used, to reflect on how we had reached these positions and to consider where we should be going in the future. Above all, the Symposium should have the right atmosphere and enough time at its disposal for the issues to be thrashed out at length and our differences to be fully understood.”

At that time print media research was in something of a turmoil (has anything changed in this respect?) and if nothing else, the New Orleans Symposium served to bring together almost all of the key researchers in the field. As Harry Henry said, as Editor of the published proceed-

ings, the New Orleans book represented “virtually as complete a compendium of the present state of the art throughout the world as could be looked for between one set of covers”.

So what were the issues that concerned us all in 1981?

The first session consisted of a description of current readership research practices across the world. We then went on to talk about the problems of:

- Validation
- Technical issues
- Quality of reading
- Ascription and modelling

and ended up with a session entitled. ‘Where do we go from here?’

So how has the balance of interest shifted over the years? One admittedly rather crude measure of this is the amount of time spent discussing particular issues and Table 1 shows how things have been changing. We have tended to spend less and less time telling each other what we are actually doing in different countries round the world. I think this is very understandable and demonstrates one of the main benefits that have come out of these Symposia. I mean the way in which they have acted as a channel of communication between people working on media research in different countries. It seems amazing now that in 1981 we spent almost a fifth of the whole Symposium just telling each other what we are actually doing. Now we have a pretty good idea of what is going on and news about new techniques and new problems get around the world pretty fast.

Table 1

## Time devoted to major topics

	1981 New Orleans %	1983 Montreal %	1985 Salzburg %	1988 Barcelona %
Current media research:				
Practices around the world	18	9	8	4
Validation	30	20	17	12
Technical issues	16	22	29	14
Ascription; Fusion; Modelling:	12 } 28	13 } 35	14 } 43	9 } 23
Quality of a reader:				
Qualitative issues	13	15	17	15
Other topics	6	19	10	45
Where do we go from here?	5	2	5	1

The amount of time devoted to technical issues and ascription, fusion, etc, has fluctuated but overall tended to increase (1981: 28%, 1983: 35%, 1985: 43%). It now looks as though we have passed the peak with probably only a quarter of the time at this Symposium being devoted to these subjects. By contrast, the amount of time devoted to the issue of validation has, rather surprisingly, tended to decline.

Another interesting development has been the sudden increase in the amount of time devoted to other issues as revealed by the programme for this Symposium (Table 2). I think it might be worthwhile to consider some of these trends and speculate about the reasons why they have changed in the way they have and what this may imply in terms of the topics that are going to grab our attention during the 1990s.

## TECHNICAL ISSUES

First of all let us look at technical issues. These are the kinds of papers that seem to cause most irritation to the users of media research as opposed to the suppliers. I do not think this is very surprising. Most of us engaged in working as research suppliers work on that side of the fence because we are fascinated by the problems that arise in conducting media research surveys in such a way as to achieve the most accurate, reliable and reproducible results we can. We are like motor mechanics as opposed to car drivers. We want to tinker with what goes on under the bonnet. The car drivers among us may be impatient to start using the vehicle we are working on but they should not be over-critical or contemptuous of our concern with perfecting the vehicle. They

Table 2

## Time devoted to other topics

	1981 New Orleans %	1983 Montreal %	1985 Salzburg %	1988 Barcelona %
Reader categorisation (lifestyles: psychographics)	6	-	-	8
Reader-per-copy	-	-	10	8
Definitions and objectives of readership research	-	10	-	-
Other uses of audience research data	-	9	-	-
The challenges facing print media	-	-	-	12
Media choices	-	-	-	10
Electronic measurements of magazine audiences	-	-	-	7
	6	19	10	45

may not care precisely how we achieve it but they will reap the benefits as they make use of the data we have collected.

However, having said that I am very conscious that at meetings of every Programme Committee in the run up to every Symposium we have said to each other that we would like to cut down on technical issue papers unless they really have something new and important to contribute. This time it looks as though we have cut back quite substantially on the number of contributions in this area – although we have got sessions dealing with the readers-per-copy issue and electronic measurement systems which could be regarded as technical issues of a sort.

I think we must recognise that technical issues are an important and integral part of the proceedings at these Symposia and are likely to remain so throughout the decade ahead – or as long as readership surveys continue to be conducted. So my forecast for the 1990s is that technical issues will continue to be important and will continue to account for 25 – 35% of the time we spend on different subjects during the course of these Symposia.

## VALIDATION

I remember the sense of wonder I felt at the first Symposium at New Orleans over the strength of feeling that the issue of validation aroused –

especially mong delegates from the United States of America. It seemed somehow naive to believe that readership research should be reporting some sort of absolute truth any more than it is reasonable to expect any other survey to be reporting absolute truth. And I have to confess that even after listening to all the debate on this subject over the course of the last three Symposia I still find it difficult to understand what all the fuss is about. We have tended to use an apt analogy in the form of readership research being the currency of exchange in the buying and selling of media. In most countries where we have only one major media survey providing the figures for everyone in the business then the marketplace could operate quite smoothly with everyone having a reasonable degree of confidence in the currency – without anyone asking too many questions about how solidly based were the promises made on behalf of that currency.

In the United States the existence of different surveys operating in parallel and producing different results generated a substantial loss of confidence in the currency. “They cannot both be right” was the cry to be heard and later on this led first to a requirement to understand better what each service was offering and then to the establishment of a project to establish a ‘gold standard’ of readership research: a yardstick of truth against which every media survey could be judged – and we will hear more during this Symposium on the steps that have been taken and the results that have so far been achieved.

I do not wish in any way to denigrate the work that is being done in this area and it is entirely laudable to try to ensure that we come as close as possible to measuring real basic readership. However, I very much doubt if this issue can ever be completely resolved. It is not so much a feeling that the search for truth is a search for the end of the rainbow but rather the conflict one sees between the classical theories of physics and the theory of quantum mechanics.

It seems to me that the uncertainty principle of quantum theory is exactly the problem we face in attempting to ascertain the ultimate truth in readership research. The very act of studying the phenomenon in such detail causes the phenomenon you are attempting to study to change so that, whilst you can describe readership in general terms which will produce perfectly valid and actionable data, you cannot describe or define readership in terms of absolute precision.

The analogy of readership research as a form of currency still holds good. Even the gold standard (if you could achieve it) will only settle the argument as long as gold provides a sufficiently flexible and adaptable yardstick. In the currency markets, no one bases their money on gold in the modern complex trading world. It is too rigid and inflexible. I think the same is true of readership research. We do not need a gold standard, we just need to have confidence in the currency and we can have confidence in the currency of readership surveys if we have a good understanding of what they are measuring. Different readership figures can exist side by side because they are measuring different aspects of the problem. I see no reason why professional suppliers and users of readership data should have to be treated as if they can only cope with very simple concepts.

I think we shall see the validity issue decline still further as a subject of importance in the decade ahead. That is not to say that we shall give up trying to understand what we are measuring and to improve on the quality and consistency of the data we collect. I think we shall see a change of emphasis towards obtaining a better understanding of what we are measuring in readership research and how this relates to the advertisers’ need to buy media space in a way which helps to achieve their advertising and marketing objectives. I think we shall probably conclude that the gold standard project currently being carried forward in the United States will take us just about as far as we can go

towards identifying absolute truth in readership research.

## READER QUALITY

Even at the first Symposium in New Orleans we clearly recognised that readership research is a substitute measure for what the media space buyer would really like to see available. I mean, of course, a measure of the direct advertising value of placing an advertisement or series of advertisements in a particular media. In the book of the proceedings Harry Henry wrote in his introduction to the session on this subject that:

“It might be argued that the advertiser, the target market for virtually all readership research, should be less concerned with the absolute size of the audience for a particular publication than with the probability that his advertisement in it will be seen”.

Media owners take the view that their job is to deliver the target audience to the advertiser. It is his job, in association with his advertising agency, to produce an advertisement which will influence the customer towards the purchase of the product or service in question. This must always remain true. It applies to every part of the contents of a publication as long as the individual who picks up the publication has the freedom to choose which sections of it he will read. Whether it is a piece of editorial material or an advertisement, the probability that it will be read will depend on such factors as:

- (i) How well does it catch the reader's attention through headline, layout and illustration?
- (ii) How much inherent interest is there in the content matter?
- (iii) How well written or how readable are the contents of the piece?

(iv) How persuasive or convincing are the arguments put forward?

(v) How important or relevant is the subject matter to the reader at this particular time or season?

(vi) How well placed is the piece within the publication to maximise the chance that a reader will happen to see it?

(vii) How long do readers spend with a particular publication (ie time spent reading)?

(viii) How often do readers return to a particular publication – ie how many occasions are there when a reader has a chance of seeing a particular advertisement?

(ix) Is there any interaction between the title, the editorial content and the advertisement appearing in it?

(x) How many different people see a particular copy of a publication and over what sort of time period (for many advertisers the fact that a title may achieve 20 readers-per-copy because it sits in a dentist's waiting room for five years is totally irrelevant to his marketing objectives. For others it is a real bonus – but we do not normally set any time limit on the age of an issue that a reader has seen in the recent past).

(xi) How important is reading location as a factor bearing on the quality of a reader to potential advertisers?

(xii) How do we refine or re-define a reader for a title such as many newspapers which are published in eight or ten different sections each targetted at a different sub-group within the title's total readership (a subject of special interest in Great Britain at the moment and one which will surface during this symposium).

Those and many other issues are the very legitimate concern of advertisers and yet our attempts to shift readership research techniques in the direction of supplying answers to all or indeed any of these issues have been comparatively meagre. Of course it is not possible to produce precise answers to these questions but we have to recognise that the readership data we provide are used by advertisers as the closest approximation they can get towards a survey that would directly measure all of the criteria I have just listed. We shall always be dealing with approximations and must never forget that what we are doing is measuring how people have behaved in the recent past (readership research) to predict how they will behave in the future (advertising campaign). And so any approximation which can be demonstrated to be generally in the right direction must improve the usefulness of the raw readership data we currently produce. Some kind of computer model that uses a formula building in factors based on special ad hoc studies to calibrate readership survey results to allow for other factors of importance to advertisers would seem to be the way forward.

Looking back to the first Symposium in New Orleans it is interesting to find a whole series of papers that threw some light on the kind of issue I have raised. For example, there was a paper by Michele Beudert of MRI on the importance of place of reading, source of copy, time spent and page exposure. There was a paper by Rolf Speetzen on the value of media exposures to an advertiser of different sorts of readers. There was a paper from Dieter Müller on the relationship between vehicle exposure and advertising unit effect and another from Friedrich Tennstädt and Jochen Hansen on calibrating the quality of reading. There were other interesting papers by Jean Quatresooz and Liliana Denon and during the discussion at the end of this session it was clear that most delegates felt that these were right and proper subjects for discussion at a Symposium on readership research.

It is in some ways a little depressing when re-reading the papers in this Session at New Orleans to feel that if they had been submitted as contributions to this fourth Symposium in Barcelona some seven years later I think they would all have been included and aroused just as much interest and debate. The truth of the matter is that despite the fact that the subject of reader quality has been an important component of all the readership Symposia, what we are actually doing out there when we carry out national readership surveys has fundamentally changed very little. The reason for this is basically money and good old fashioned self-interest. In most countries the costs of readership surveys are borne either directly or indirectly by media owners. Almost all new techniques we might apply to measure the quality of reading would lead to the estimated size of target audiences apparently reached by particular titles to be reduced in size. Why should we expect media owners who pay for the research to defend and promote any survey procedure which would cause most if not all titles to apparently lose part of the audience they claim to deliver to the advertiser and, in addition, lead to very painful adjustments between titles where some might appear to lose out less than others? The poachers are the gamekeepers and there is a strong interest in preserving the status quo – unless, of course, it is a response to a challenge from an outside media such as television.

I have always remembered a conversation I had with Henry Durant when I was at BMRB and he was running Gallup in Great Britain. The two companies were jointly commissioned to carry out a readership survey in the Republic of Ireland. Henry wanted to use a new technique which would produce a measure of readership of a title as a percentage of households rather than as a percentage of adults. His approach had not even been piloted and I adopted a much more conservative line. The argument was fierce but I well remember Henry's clinching

argument in favour of his technique which he believed would produce much higher percentage penetration estimates. "Remember", he said, "Gresham's Law of Readership Research: large numbers drive out small numbers". It is interesting to note that one of the few major innovations made to any readership survey in this decade has been the introduction of MPX measurements on the MRI survey in the United States. It is also interesting to note that this innovation very cleverly avoids breaking the Durant-Gresham Law of Readership Research.

The issue of reader quality in all its aspects is so important to readership research that it is clear that this subject will form an important segment of future Symposia during the 1990s. However, if real progress is to be made I think that advertisers and advertising agencies are going to have to play a much bigger role in experimental studies than they have in the past. And by that I mean that we shall need to see them prepared to invest a great deal more money and not leave it all to the media owners. There was an attempt to address this problem in South Africa by raising money for research through the addition of a small premium to the cost of every advertisement. In the United States of America the ARF has been able to raise quite substantial sums of money to help fund basic research studies – but as a percentage of the money spent on advertising such sums are still small beer.

With the development of global marketing and the very important changes taking place in Europe as we move towards the 'Grand Marché' of 1992 I wonder if the time is ripe for a programme of research to be developed and funded on an *international* basis. I think this is a question which should perhaps be put to the multi-national advertisers and the multi-national advertising agencies. The international media owners are already spending money to provide basic readership data across national boundaries in Europe and else-

where. How about the multi-national advertisers allocating a small part of their budget towards the funding of an international research programme to produce data which will be of value to every advertiser whatever print media he is using and whether he is advertising locally, regionally, nationally or on an international basis?

## NEW DIRECTIONS

I said earlier on that in the papers submitted for the present Symposium there are a higher proportion dealing with entirely new subjects or with subjects which have been dealt with in a rather peripheral way at earlier Symposia. These subject areas are shown in Figure 1.

On the first of these, 'The challenges facing print media', we have a number of papers that elaborate on some of the points I have referred to in this talk today. The papers by Roger Godbeer and Bob Schreiber in particular pick up the topic of what advertisers would like to see provided by media research and why they are not provided with everything they would ideally like to see available.

Figure 1

The challenges facing print media	SESSION	2
Media choices	SESSION	3
The electronic measurement of magazine audiences	SESSION	10
Reader categorisation (lifestyles, psychographics, etc.)	SESSION	7
Readership and circulation	SESSION	5

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In Session 3 called 'Media choices', we shall be hearing from a number of speakers covering a variety of different aspects of the problem ranging from the competition for audiences between different media to the issue of how most effectively to measure readership among special interest groups of one kind or another – a subject of particular interest since concern with the levels of readership among specific segments of the population is assuming increasing importance to advertisers and media owners alike.

In Session 10 we have two interesting papers on ways in which electronic systems of audience measurement could be introduced to the field of readership research.

In Session 7 there are some interesting papers on the development and application of lifestyle and psychographics in readership research and in Session 5 the issue of readership and circulation is addressed in papers by Pym Cornish, Peter Walsh and Steve Douglas.

I hope you will find that in this Symposium there is a greater variety of subjects being discussed than we have had on previous occasions.

One of the things you quickly learn when you work on the Programme Committee for one of these events is that media researchers are the world's worst at producing their papers on time – but on the other hand you also get to realise that it will probably be all right on the night.

As you will have gathered, I think that there are signs that some of the subjects we have been discussing at these Symposia have run their course whilst others are likely to assume greater importance in the future. What is remarkable is that these Symposia maintain their high level of professionalism and interest around the world.

I am delighted to see so many familiar faces here in Barcelona and, once again, I think you will leave this city feeling that this was one conference at which you were glad and privileged to be present.