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SALIENT TRENDS – WHAT'S HAPPENING WHERE?

INTRODUCTION

For New Orleans 1981, Montreal 1983, Salzburg 1985 and now Barcelona 1988, I was and am privileged to present delegates with a 'summary of current readership research', a compendium of technical survey details in as many countries as we were able to muster. In 1981 the number of surveys for which we had details was 24 in 18 countries, now the number of surveys is 39 in 29 countries.

The Summary collects a great many details about each survey covered. It does not explain why a particular survey chooses to deal with a particular aspect in a particular way. However, since the first Summary was collated, the process which took place in many countries of reviewing their survey practices and features, often inspired and stimulated by the Readership Symposia, resulted in changes being made to a fair number of surveys. These changes can now be charted by comparing the details of the early with the late Summaries. In doing so, an understanding of the underlying reasons for the changes we observe might also occur.

In this paper, I should like to highlight the salient changes I have noted in updating the Summary for Barcelona 1988.

Preceding my review of these changes, I should like to give some news items about countries with particular activities I thought of interest. They are given as headlines rather than in-depth because most of the issues will be discussed later in the course of this Symposium.

UP-DATE: A ROUND-UP OF NEWS ITEMS

The Netherlands. In 1985 we reported the existence of three Dutch surveys in the summary. Now there is only one. The survivor of what must have been a very turbulent period in Dutch readership research is the SummoScanner (formerly the Market/Media Scanner). The SummoScanner measures average issue readership by way of 'First Reading Yesterday' (FRY) by telephone. While this method has many attractions, it is not without its critics, notably concerning the small sample sizes of readers of individual titles which in turn makes it necessary to calculate expanded frequencies on the basis of grouped titles rather than individually.

Denmark has decided it will use the Dutch FRY telephone method for its national readership survey as from 1989. This means – incidentally – the end of the much admired 'Danish Disc'. The Danish survey organisers plan to overcome the problem of small sample sizes for calculating expanded frequencies by increasing the samples so that figures can be calculated for all individual titles.

Norway is the third country in which the FRY telephone method will be used – in this case as from October 1988.

Germany. Without taking away from contributions to be given later at this Symposium, I think it is worth mentioning as a country in the news. There are two developments of interest. One is AG.MA's so-called 'Partnerschaftsmodell' (the partnership model), the other is the

development concerning the much discussed question of the relevance of the readership data which are produced for the industry.

As to the first development, the partnership model, I hope it is in order if I explain briefly what it means (as far as I understand it). Under the partnership model, three separate surveys are conducted. One covers the press with over 20,000 personal interviews. The second survey covers the broadcast media with over 24,000 personal interviews. And the third survey is the 'official' TV panel in Germany of 2,600 households. These three surveys are merged into each other by fusion in order to produce the final Media Analyse (MA) data. The process of fusion starts with a fusion of the TV panel data into the broadcast survey data. The resultant fused data are then in turn fused into the press survey data. I understand that both fused and not fused data can end up on user's desks, depending on which file is accessed, which I believe has led to some confusion amongst users.

The second subject of debate in Germany is the relevance of the press data produced by the MA, with advertisers and agencies on one side and media owners on the other. The current result of the debate is that there will shortly be the introduction of *advertising* contact measures in MA in addition to the conventional *media* contact measures. Results of both measures will be available to users of the survey's data side by side.

France and South Africa are two countries in which grouped titles, the method pioneered by Great Britain, have been adopted for their media studies, CESP and AMPS respectively. But in contrast to the British National Readership Survey, mastheads are used. In South Africa titles are organised by frequency of publication while in France titles are grouped as in Britain – according to publication type. A further variation is that in France dailies are still

asked about by showing individual title cards following experiments whose results cast some doubt about the levels of newspaper readerships obtained by grouped titles. And in South Africa, a further drastic step was the introduction of a six month filter question (there was a twelve month filter previously) which had the effect of reducing readers per copy figures, particularly of magazines.

India, on the other hand, reports that after a great deal of experimentation, it was decided not to use the grouped titles method for their next survey. The Indians will use single mast-head cards instead, as they did before.

Italy is another country with some new developments. In Italy, there were traditionally two press surveys, one for newspapers (now called ISEGIPRESS) the other for magazines (now called ISPIPRESS). The magazine survey is this year dividing itself into two matched samples, one for weeklies, the other for fortnightlies and monthlies. They will be merged by fusion.

But a more far reaching development in Italy is that the organisers of the newspaper and of the magazine surveys are contemplating the running of a single survey with one questionnaire for all titles, administered to the same sample. Tests are already under way. Before the new unified survey comes about, it is planned that the current data of the existing two surveys will be merged by fusion.

Finally the USA. A progress report about the quest for the Gold Standard, which reached us in Europe via Rolf Speetzen's paper given at this year's ESOMAR media research seminar in Madrid, tells us that of five tests, two had been completed by the time Rolf Speetzen wrote his paper, and three were outstanding. All five tests use observation methods and validate by First Reading Yesterday. Each test is designed to deal with a particular aspect of the readership research problem, namely:

- (i) public place reading and overclaiming,
- (ii) at home reading and overclaiming,
- (iii) at home reading not for the first time but claiming first time,
- (iv) public place reading not for the first time but claiming first time, and
- (v) overclaiming of issues before they are officially published.

We hear that the first two tests were carried out with very encouraging results. We are looking forward to learning more about them and the other three tests at this Symposium.

OBSERVATIONS ON TITLE INCREASE AND COSTS

For the comparisons that follow, between the latest summary details of 1988 and earlier years, I have chosen to take 1983 as the control year in preference to 1981 and 1985. The reason for my choice is that in 1983 the Summary contained a larger base of surveys than the 1981 Summary did, and – compared with 1985 – 1983 provides a larger gap with 1988 making the differences we observe more striking.

The first very striking difference between 1983 and 1988 is in the number of titles covered per informant by the reported readership surveys. There are 29 surveys in 1988 (out of 39 in total) which were also reported in 1983. Based on these 29 surveys, the average number of titles per survey per informant was 105 in 1983, rising to 128 in 1988. This is an increase of 22%.

Only two surveys reduced their title lists. These are the Estudos Marplan in Brazil (down from 160 to 93 titles) and CESP in France (down from 131 to 129; this is remarkable since a

grouped titles method is now used in France). The studies with the sharpest rises in the number of titles covered per informant are Australia's Roy Morgan survey (up from 47 to 149 titles), New Zealand's AGB/McNair survey (up from 37 to 90 titles) and Britain's NRS (up from 121 to 262 titles).

The second observation concerns the cost of surveys. Unfortunately details about costs are only available for a limited number of surveys. As far as costs are available we must thank EMRO, the European Media Research Organisations. There are seven surveys common to the 1983 and 1988 Summaries for which we are able to report survey costs for both years. These are Denmark, Finland, Germany (MA), Italy (ISPIPRESS), South Africa, Switzerland, and the UK (NRS). In the cases of Germany and South Africa, the 1988 costs reported include the TV survey elements of their whole operations, while the 1983 costs did not. For my calculations I have therefore halved their reported 1988 costs to obtain a rough estimate of the readership research costs of these two surveys.

At constant prices then, overall, the survey costs of the investigated seven countries have increased by 15%. But, taking the increase in number of titles into account, the costs per title surveyed have decreased overall, as shown in Table 1.

As can be seen, in terms of costs per title compared with five years ago, Finland and the UK seem to have the most economic surveys. The two surveys in Germany and Switzerland now seem to be more expensive per title covered than they were five years ago.

When looking at the reported lengths of interview of these seven surveys, all but one have kept their times devoted to the readership questions constant or even reduced, in spite

Table 1

Survey costs per title covered

(Estimated at constant 1988 prices and converted into US dollars)

	1983 US\$	1988 US\$	Index (1983 = 100)
Denmark	5,200	4,000	70
Finland	3,300	1,800	55
Germany (MA)	16,700	20,700	124
Italy (ISPIPRESS)	7,600	7,000	92
South Africa	18,000	14,300	79
Switzerland	2,700	2,800	104
UK (NRS)	6,300	3,700	59
Average seven countries	8,000	6,800	85

of the increase in titles. South Africa is the one country which has increased its time devoted to the readership questions.

How can these findings be explained? In the case of the British National Readership Survey there was of course the change in 1984 to the EML grouped titles method. The EML method had – as may be remembered – as one of its objectives the increase in the number of titles covered by the survey without materially lengthening the interview, hence without adding greatly to overall survey costs. EML was an important step with economic as well as methodological advantages.

For the other four surveys for which there seems to be a reduction in costs per title covered, no such easy explanation is at hand. There is no evidence that the estimated cost reductions relate to any methodological changes

made, let alone that the changes which are reported in the summaries were made with cost savings in mind. Furthermore, there were other changes as well, relating to sample sizes, non-readership contents of the interview, and reporting structure which might have affected costs.

However, be this as it may – we *do* observe that the four countries which now spend less per title *did* make noticeable methodological changes to their readership questions (mainly relating to filter and frequency questions, and to rotations), while the two surveys with no cost reductions per title did not. (However, in all fairness, I must stress again that in the cases of the German and South African surveys the above cost estimates are based on my own guessed assumptions of the likely shares of costs attributable to the readership parts of their operations).

OBSERVATIONS ON SURVEY FEATURES

My third observation is that nearly half of all surveys made methodological changes in the last five years. Out of the 29 common surveys in the 1983 and 1988 Summaries, 13 report changes. Some of these changes were fairly radical, others less so.

Below is a listing of the 13 countries together with the survey features that were changed. It shows that the screening and the frequency questions were mostly affected by change. Three surveys newly introduced a screening question (Denmark, Netherlands, UK NRS). Two surveys widened the filter of their existing screening question (Belgium and Finland), while one survey narrowed its filter (South Africa).

Seven surveys changed their frequency questions. The tendency for frequency questions seems to be to make them less variable across publication groups (Denmark, Germany AWA, Singapore, South Africa, Sweden, UK NRS and UK TGI).

One survey changed its method of asking the recency question (UK NRS).

The order of asking publication groups was changed by four countries: Denmark and South Africa changed from a rotated to a fixed order; USA SMRB changed from a fixed to a rotated order; and Germany AWA changed its fixed order which previously started with dailies to a fixed order which now ends up with dailies.

Eight surveys added qualitative reading questions either new (Belgium, France, Netherlands, UK NRS) or in addition to already existing qualitative questions (Finland, Germany AWA, Italy ISIPRESS, USA SMRB). This makes the total number of

surveys with qualitative reading questions in the 1988 Summary 16 (out of 39 surveys).

LISTING OF CHANGED SURVEY FEATURES

(Changes between 1983 and 1988)

Belgium (CIM Survey)

Screening question changed from 'last 12 months' filter to 'in the last months' filter.

A source of copy question was added.

Denmark (Dansk Media Index)

(Still reporting on personal interview survey before changing to telephone in 1989) A '12 issue period' filter question was added. The frequency question was changed from 'average out of 6' to 'average out of 12'. The order of asking of publication groups was changed from a rotated order to a fixed order.

Finland (KMT)

Mastheads were changed from black and white to coloured. The filter question was changed from a '6 issue period' to an 'ever read' filter.

Age of issue, intensity of reading, and reader involvement questions were added to an existing source of copy question.

France (CESP)

Grouped titles were introduced for magazines (not for dailies). The sequence of asking readership questions was changed from 'screen, then recency and frequency' to 'screen, then frequency and recency'.

A source of copy question was added.

Germany (AWA)

The frequency question changed from a scale with five points for some and seven points for other titles to a seven point scale for all titles. The fixed order of asking frequency groups was changed from Dailies, Monthlies, Weeklies to (Quarterlies), Monthlies, (Fortnightlies), Weeklies, Dailies.

A reader involvement question was added to an existing intensity of reading question.

Italy (ISPIPRESS)

Page exposure questions were added to an existing source of copy question.

Netherlands (SummoScanner)

The Scanner introduced an 'ever read' filter. Page exposure questions were added.

Singapore (Media Index)

The frequency question was changed from 'number read in an average week, month, three months, six months' question to a 'past week, past month, past six months' question.

South Africa (AMPS)

Grouped mastheads were introduced. The screening question was changed from a 12 months to a six months filter. The sequence of readership questions was changed from 'screen and frequency, then recency' to 'screen, then recency and frequency'. The frequency question was changed from 'number read out of last six' to 'number read in average week, six weeks, 12 weeks, six months'. The order of asking of publication groups is now fixed.

Sweden (ORVESTO)

Mastheads instead of typescript titles are shown on the Swedish self-completion questionnaire. The frequency question was changed from a numeric scale with up to 15 points to a mixed verbal and numeric scale with seven points for all titles.

UK (National Readership Survey)

The EML grouped titles method was introduced as follows: single masthead cards were changed to grouped typescript titles on cards. A 'past 12 months' filter was introduced. The frequency question was changed from a numeric scale with different points per publication group, to a verbal 4-point scale for all groups. The recency question was changed from an indirect question with two coding positions to an extended recency question common for all groups with mixed direct and indirect questioning. Source of copy and age of issue questions were added.

UK (TGI)

The frequency question was changed to be in line with the EML frequency question of the NRS.

USA (SMRB)

The order of asking publication groups was changed from a fixed order to a rotated order.

Place of reading and proportion of pages read questions were added to an existing question about number of separate reading days.

FINAL COMMENTARY

In conclusion, one last observation. The changes which I have noted were designed to

contribute to better solutions for the readership studies in the respective countries. The changes seem to be at least partly the fruits of the discussions and interchanges which took place in the period since New Orleans 1981.

Some of the changes seem however very eclectic. They probably suit the survey and the standard of discussion within each country concerned. There is still no agreement across countries in detail, but there is progress. What

I mean can be seen, for instance, by the various choices of filter questions.

More countries now than before opt for a first filter question for their surveys. The filters themselves however range from 'had in hand' and 'ever read' over 'past year' down to 'past six months' or 'recent months'.

We are near but still far away from 1992.