

8.3 Media research: a publisher's expectations

INTRODUCTION

If publishers did not exist, media researchers would have to invent them. After some of the readership traumas of the past decade, it is a moot point whether publishers would wish to invent media researchers!

Publishers desire comparatively little from the research world. They ask only two things. Firstly that they can sleep at night. And secondly that the two major research protagonists, the media researcher and the respondent, get together and produce sets of figures, which can then be fed to the publisher's marketing and advertising sales departments, without eliciting cries of alarm or disbelief from either, and generating acres of cynical editorials in the trade press. This happy state has not yet come to pass, but Moses-like, the media researcher strides before the publisher, guaranteeing the promised land just round the corner from the next validation study.

Understandably, the publisher by now is getting a little pessimistic.

What exactly is it that the publisher wants from media research? In the spirit of scientific endeavour that has lifted media research out of the ranks of the 'soft' sciences like sociology, psychology and placed it firmly alongside the 'hard' sciences like economic forecasting, it is imperative to define certain terms.

Media researcher

A 20th century astrologer handicapped by tunnel vision, who, unable to apprehend the present, helpfully extrapolates it.

Respondent

A biodegradable but non-recycleable animal, with selective memory and opposable thumbs capable of grasping at straws.

Pessimist

Same as an optimist, but better informed.

WHAT THE PUBLISHER WANTS

Speaking in a South African context (the caveat is necessary, since South African publishing differs in one important respect from other Western countries, in that 90% of our sales are street sales, *not* by subscription) the publisher wants three conditions to be fulfilled by

readership research. These are listed and then expanded on:

- (a) *The readership technique must be 'robust'.*
- (b) *The readership figures should give 'exposure probabilities' that equate (even if roughly) to the exposure probabilities of other media.*
- (c) *The measures should have commercial relevance.*

WHAT 'ROBUST' IMPLIES

Robust does not only mean that the research method should be stable, that it should be able to be repeated and yield comparable figures. It means the technique must be able to stand up to rough handling. It must be able to measure readership not only in the media-rich, literate countries of the West, but in the milieu of the unsophisticated semiliterate societies of the third world.

This may not be a criterion which may seem important to you, but it is of vital concern to South African researchers, since the great mass of the South African population is 'third world' rather than Western. With the industrialisation of the third world, and with the ever increasing interest by multinational advertisers in establishing themselves in these countries, the problems of doing media research in these regions will soon cease to be of academic interest and will start to present some practical problems. Have the discussions at the symposium adequately encompassed the difficulties, which are listed below?

Haphazard versus deliberate patterns

In media rich countries there is an embarrassment of media riches. Hundreds of magazines, dozens of radio stations, several TV channels all vie for attention. The consumer in the West has to make a number of conscious and deliberate choices to select the media to which he is exposed. Because the choices are made by him, he can respond to questioning and recount his decisions.

In the media-poor regions, media quite often 'choose' the consumer. In many instances publications are not bought, they are borrowed or passed along or they 'happen' into the home. In circumstances like these, the consumer is not nearly as sure as his Western counterpart of his media habits.

In the following table we show the claims made by fairly unsophisticated respondents to a recency question on daily newspaper readership. They were then asked to sort through piles of the previous week's newspapers and

8.3

Media research: a publisher's expectations

TABLE 1

Title	Percentage claiming last issue and recognising last issue
Post	75
Sunday Post	69
Rand Daily Mail	77
Sunday Times	76
Soweto News	83
Sowetan	68

Source: *Readership Study of Soweto News and Sowetan 1980. Conducted by IMS, Johannesburg.*

identify the ones they had read. The identification claims differ quite dramatically from the recency claims.

Table 1 shows the percentage of recency last issue readers correctly claiming to recognise the 'last' issue.

We do not believe that the recognition method used above reflects any absolute truth. Indeed in another test when respondents were shown pictures of a number of advertisements including a fictitious one, the misidentification was high. The results comparing a literate and semiliterate group are shown below. It is interesting to note that the longer the time reference frame, the higher the misclaim.

But we do feel more secure with a claim based on a respondent holding up a newspaper and positively identifying a story or picture as one he has seen, rather than a claim based on a less direct inferential technique.

Table 2 shows percentage claiming to see an advertisement that was never exposed.

TABLE 2

	Saw in last week %	Saw in last month %
Literate group	3	11
Semiliterate group	6	19

Source: *a study on bus advertising in the coloured and white markets 1981. Conducted by IMS Johannesburg.*

The status problem

Status, particularly in the typical environment in which an interview is conducted is also a problem. Many third world families share a dwelling with one or several other households. There is little privacy. When a respondent is interviewed, it is often in front of a large audience who encourage and criticise his performance.

Claiming, as he generally has to, non-readership of most publications he is questioned on, is not good for respondent self-image. Even card sorting techniques do not fully guard against the respondent falsely claiming readership of certain publications, showing both the peer group audience and interviewer that the respondent is an educated man of the world.

Abstract can be just that

Western abstractions are also not always accurately understood. We measure time against a calendar and clock, elsewhere time is often event related. 'Did you read *Time* before or after the crocodile got Uncle Bob?', may be an impossible readership question to design, but it may get a more accurate response.

These are a rough sampling of some third world research difficulties. This list is far from comprehensive, it serves merely to remind researchers that new experiences beyond their present ken still lie in wait.

EQUIVALENT EXPOSURE PROBABILITIES

Advertising makes the media go round. Every year the number of media and the rate of inflation seems to increase faster than the volume of advertising, and with the proliferation of electronic media, publishers have an increasingly difficult battle on their hands to keep their share of the advertising money.

It is hard to do this if print media are measured on 'eyes-open-and-fixed-on-a-page' basis while the 'saw a flickering blue light and so was aware I was in the vicinity of a television set' school evaluates the competition. This is an exaggeration, but sometimes only just.

Fear and self-interest on the part of publishers are significant factors in some of the problems facing readership measurement today.

No matter how pure the intentions of media researchers, commercial realities are going to continue to bedevil the industry, unless some sort of consensus can be reached amongst most major media types for roughly equivalent exposure – probability measurements. This is a formidable task, but it needs urgent attention.

THE THORNY PROBLEM OF COMMERCIAL VALUE

Research data goes two different ways once it gets to a publisher. On the one hand it goes through to the marketing and editorial departments, who, along with circulation figures decide how well or otherwise the publication is doing in the market segment at which it is aimed. The figures also go through to advertising sales

8.3

Media research: a publisher's expectations

who rework it and bombard agencies and advertisers with proof positive that *their* medium towers head and shoulders above the rest.

Big numbers are nice, but can be marvellously unhelpful and lead to dangerous self-delusion. In the world of readership, the theories of supply and demand often do not seem to exist. A publication sells 100,000 copies (say), but has 15 (according to research) readers consuming each copy. Surely if that many people read a copy the publication is in great demand, and the supply (circulation) will go up. Judging by the many publications with low circulations, but hordes of readers, this is not axiomatic.

The apparently vast number of readers relative to circulation can lead a publisher to believe he has saturated his market. Everyone is reading, his sales have peaked, he can suspend his marketing effort. This is inadvisable thinking.

Possibly advertisers are highly gratified by the knowledge that each ad they place in a copy of a medium is going to be viewed by many pairs of eyes. The implications are they can place relatively few ads, but bask in the assurance of vast market coverage. Some

advertisers think the big numbers are great, others are not so sure that the various passalong readers are really as tuned in to their advertising as the original reader/buyer.

Both publishers and advertisers need to establish which readers are important from a commercial viewpoint. The publisher in terms of which readers are actively interested in getting the publication, the advertiser in establishing which readers have a reasonable chance of seeing and reacting to his ads. It could well be that these two quantities are one and the same, and it is important that research starts to find out, or at least allows publishers to extract these figures from the data published.

IN CONCLUSION

While publishers still have problems, I believe that the coming together of the international media research community to debate technique and methodologies could well presage the start of a more settled media age. With luck, even a golden age. And gold gives publishers very little in the way of problems!