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WHAT'S HAPPENING WHERE?
- Salient Trends

SYNOPSIS

This paper first gives a "news update" about recent developments as reported from various countries concerning their readership surveys. It then describes salient trends observed since 1981 when the first Symposium took place. The trend observations deal with the increases in sample size, increases in length of interview, increases in the number of titles measured, methodological changes which might have helped in dealing with larger number of titles, and, finally, the increase in the number of surveys with "quality of reading" questions.

Introduction

Since 1981, when the first Readership Research Symposium took place in New Orleans, I find myself in the rôle of chronicler of methodological changes in readership surveys around the world. This rôle came about by my involvement in compiling the "Summary of Current Readership Research". The fifth update of this document is being presented to delegates at this 1991 Hong Kong Symposium. It includes 39 surveys in 30 countries. In the first Summary of 1981 there were 24 surveys in 18 countries.

A by-product of compiling the updates of the "Summary" is the interesting task of noting the changes. In this paper I should like to summarise my observations in this respect. Because of the ten-year anniversary of the Symposia I have opted for a comparison of the 1981 with the 1991 "Summary", rather than restricting myself to noting the changes since 1988, when the last Symposium took place, in Barcelona.

Most of the observations I made in Barcelona in a paper under the same name, are of course still valid. Two and a half years are not a very long time in readership research. However, it seems to be of interest to do both, give an update of news about what's happening in various countries since 1988, and give an overview of trends over the ten-year period since 1981.

In the following, after the news update, I should like to give my observations concerning sample size increases, length of interview increases, number of titles covered by the surveys, together with comments on methodological changes which might or might not have bearing on length of interview when the lists of titles increase, and finally on "quality of reading" questions.

Before I start, I would like to say that the dry facts chronicled here do of course in no way give a picture of the amount of debate, intrigue, anguish, desire and fear of unwanted consequences which preceded these changes. This we can only imagine.

News Up-date

From Australia it is reported that the black and white masthead cards employed by the Roy Morgan Readership Survey have been changed to coloured cards. The survey now also measures separately the readerships of Saturday issues of daily newspapers.

Belgium reports that the Voters' List is no longer available for sampling purposes. The survey now uses the quota method of sampling. Further news concerns the length of interview which needs reducing (currently 90 minutes). Radio weeklies and Free weeklies are from 1992 to be measured separately in a separate survey and then to be fused into the standard CIM survey.

Brazil lets us know that two qualitative reading questions are now available on the Estudos Marplan Survey: source of copy and proportion of pages read.

In 1988, Denmark had changed over to the telephone method, using FRY (First Reading Yesterday) for calculating average issue readership.

Finland reports about its plans to include quality of reading questions on its National Readership Survey. Piloting is under way testing five different concepts. A further development in Finland is the testing of the feasibility of using a micro-computer panel to measure time budget with media.

"Time budget" tests are also under way in France, with a view of launching a new multi-media survey under the CESP umbrella in 1991. This survey will deal with yesterday reading events, using a new variant of the FRY (First Reading Yesterday) method, in a face to face interview.

Plans to add quality of reading questions to the AG.MA survey in Germany, as reported in Barcelona in 1988, have not yet reached reality. Tests undertaken in 1989 showed effects which were not acceptable.

Italy is now merging their separate surveys by fusion - the magazine survey, called ISPIPRESS and the newspaper survey, called ISEGIPRESS. Plans to create a single interview survey for newspapers and magazines together have not come to fruition.

From Japan we hear that there is only one significant readership survey available, the ACR survey (Audience and Consumer Report) conducted by Video Research. MMR (Mass Media Research) has discontinued its survey in 1989.

The SummoScanner in the Netherlands has reduced its telephone sample from 39,000 to 32,000 per annum, but increased its annual product usage sample for the self-completion questionnaire from 7,500 to 13,500.

In Norway, the survey dealing with regional newspapers nationwide (now called NAL AVISUNDERSØKELSE) has switched to the telephone and FRY method in 1989, but the National Readership Survey (NORSK MEDIEINDEKS) is still being conducted as a face to face Recent Reading survey.

In South Africa numerous tests have been conducted, following their switch to a grouped titles method and to an initial six-month filter (from a 12-month filter), as reported in 1988. The current "fine tuning" tests include work concerning the seemingly inflated readerships for publications circulating amongst the black population. The "first reading within issue interval" approach, used by AMPS since 1987/8, is being reported as having been generally accepted.

Switzerland is the third country on this list (after Denmark and Norway) from where a recent change to the telephone method is being reported. The new WEMF/REMP survey is called MACH Basisstudie and realises the concept of a large telephone survey as the basic survey of an integrated media research system, allowing privately sponsored additional questions and follow-up sampling of particular target groups by postal, face-to-face or telephone methods. In contrast to the Dutch, Danish and Norwegian telephone surveys, the Swiss do not use FRY (First Reading Yesterday) for calculating average issue readership.

The current issues under discussion in the United Kingdom are Sections Readership (that is the readership of the different distinct sections of newspapers), readership of Saturday issues of daily newspapers, and how to reduce the media list of the National Readership Survey which is thought to have become too long. Sections Readership is being addressed from January 1991 by collecting "topic interest" data of informants. Saturday readership questions are currently piloted; and the media list has been somewhat reduced from 293 titles in 1990 to 260 in January 1991. Finally, since July 1990, there is a full scale split sample experiment on the NRS, involving mini-mastheads on the back of the British EML (Extended Media List) grouped titles cards.

Sample Size Increases

What changes have taken place over the last ten years in the surveys monitored by the "Summary"? My first observation is that there is a definite trend towards larger sample sizes. Larger sample sizes allow for better target group definition, result in less variation from reporting period to period, and allow for smaller titles to be measured. Of the 23 surveys which I am able to analyse between 1981 and 1991, 16 have increased their sample sizes making the total number of interviews conducted by the 23 surveys, 526,000 in 1991 compared with 352,000 in 1981, an increase of nearly 50%. The five countries with the biggest increases in sample size for their readership surveys are shown in the following table:

Largest Increases in Sample Size

	<u>1981</u>	<u>1991</u>
Switzerland	8,000	40,000
Netherlands	10,000	32,000
Denmark	15,000	37,300
Australia	12,000	29,000
Spain	20,000	44,000

You will note that the three countries at the top of the list (Switzerland, Netherlands and Denmark) have switched to the telephone method of conducting their surveys. Australia's and Spain's surveys are conducted face-to-face.

Length of Interview Increases

The second trend I observe is towards longer interviews, though there are some countries which have managed to reduce their interview lengths. The ten surveys out of 23, which have increased their lengths of interview are:

Overall Length of Interview (minutes)

	<u>1981</u>	<u>1991</u>
Belgium	60	90
Canada	45	60
Finland	40	45
Germany (AWA)	80	110
Ireland	30	35
Italy (ISEGI)	23	30
South Africa	35	55-70
Spain	23	45
UK (NRS)	36	37
USA (MRI)	45	48

Overall, including all 23 surveys analysed, there is a 10% increase in overall interview length.

The countries which have very substantially decreased their overall interview lengths are Denmark and Netherlands, both countries now using the telephone method of interview.

As far as the readership part of the interview is concerned, this occupies, on average, over all 23 surveys, just under 50% of the total interview time. Six of the 23 surveys report an absolute increase in their readership sections, as follows:

Length of Readership Part of Interview (minutes)

	<u>1981</u>	<u>1991</u>
Canada	25	35
Germany (AWA)	25	50
Ireland	10	13
Italy	15	20
South Africa	15	20-25
USA (MRI)	20	25

Only two surveys report a decrease in length of the readership part: Germany (AG.MA) and Netherlands.

Number of Titles Covered

As already reported in Barcelona in 1988, the most striking trend is the dramatic increase in the number of titles covered by the readership surveys. In total over all the 23 surveys analysed in the 1981 and 1991 "Summaries", there were 2,147 titles measured in 1981 and 3,379 in 1991, an increase of 57%.

As we have seen, the length of interview has also increased but not as much as that, except in a few surveys. In the following, I have grouped the 23 surveys into four categories, indicating by which method the increase of titles was potentially counteracted. These are the telephone method, the grouped titles method, the method of splitting samples, and the method of streamlining the interview by changing the order of questions or the order of presentation of publication groups et cetera. The fifth category includes the surveys without methodological changes.

First, the countries which switched to the telephone method:

Number of Titles Covered

	<u>1981</u>	<u>1991</u>
Switzerland	169	400 (incl. regionals)
Norway (Regional)	187	173
Netherlands	116	169
Denmark	64	65

Second, the countries which switched to the grouped titles method where a group of titles are listed on a card as opposed to single titles on single cards:

Number of Titles Covered

	<u>1981</u>	<u>1991</u>
UK (NRS)	105	293
France	94	143
South Africa	72	84

Third, there is one survey which has resorted to splitting its sample; one part is asked about the 40 weekly publications, the other about the 77 monthly publications. Results are then merged by fusion:

Number of Titles Covered

	<u>1981</u>	<u>1991</u>
Italy (ISPI)	78	117

Next, the countries which changed the technical details of asking readership questions in some way or other and where it can be argued that the methodological change could have had a beneficial effect on length of interview:

Number of Titles Covered

	<u>1981</u>	<u>1991</u>	<u>Method Changed to:</u>
Finland	52	119	Filter question
Germany (AWA)	94	245	Grouping single title cards into packages of cards
Germany (AG.MA)	91	136	Frequency/Recency questions horizontal
Ireland	18	22	Verbal frequency
Italy (ISEGI)	43	52	Frequency/Recency questions horizontal
UK (TGI)	144	187	Verbal frequency
USA (SMRB)	150	122	No frequency question

Finally, the countries with no methodological changes or where the change cannot be argued to have beneficial effects on length of interview:

Number of Titles Covered

	<u>1981</u>	<u>1991</u>	<u>Method Changed to:</u>
Australia	64	169	TTB (Through the Book)*
Belgium	105	165	(no change)
Brazil	148	93	(no change)
Canada	52	78	(no change)
Norway (NRS)	32	38	(no change)
Spain	67	225	Filter, Frequency, Recency questions vertical
Sweden	78	116	Logo types (on self-completion questionnaire)
USA (MRI)	165	240	(no change)

* It should be noted that in 1981, the "Summary" reported the McNair Anderson survey; in 1991 it reports the Roy Morgan Readership Survey.

Apart from the aspects of length of interview and number of titles covered, it is interesting to note that 18 out of 23 surveys analysed have made methodological changes reported in the "Summary". This is not to say that those for which no changes were reported stood still!

Quality of Reading Questions

The last chapter of this paper deals with the increase in "quality of reading" questions included in national readership surveys. Quality of reading questions seek to provide quality of contact measures in addition to the standard average issue readership measures. In 1981, 13 out of the 23 surveys analysed, reported to have had one or more quality of reading questions. In 1991 there are 16. There are six surveys with no such questions in 1981 but with such questions included in 1991 (namely Brazil, France, Germany (AWA), Italy (ISEGI), Spain and UK (NRS)), and there are three countries where the quality of reading questions are now deleted (Denmark, Sweden and Switzerland. However, in Switzerland, a completely separate survey now deals with qualitative aspects, namely the new QMS - Qualitative Media Study).

However, the great interest in these types of questions can be judged from the increase in the number of questions asked, as follows:

Finland increased the number of quality of reading questions from one to five, Italy (ISPI) from one to four, Norway (Regionals) from one to two, South Africa from one to two, USA (MRI) from six to eight, and USA (SMRB) from one to six.

The most popular question remains the "source of copy" question, asked in 14 out of 16 surveys with "quality of reading" questions, followed by "page exposure" and "time spent" questions (each asked in six surveys).

Conclusion

In conclusion, we have seen that much has happened since 1981, when the first Readership Research Symposium took place. There are more titles to be measured, more information is being collected, larger samples are employed, new methods of conducting the interview are found, and a great deal of "fine-tuning" the readership questions has been undertaken.

Since 1988, when the last Symposium took place, the pace of change has not relaxed. Three more surveys switched to the telephone method, though one of them, Switzerland, rejected FRY (First Reading Yesterday). There is increased pressure for adding "quality of reading" questions to national readership surveys. Much work is done to pilot new questions and methodological changes, and to explain the effects which are observed once the changes have actually been made.

Whether all the changes made were made in the interests of greater accuracy and reliability of readership data, or whether some were made in order to balance the interests of the various parties involved, that is a different matter.