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9.5 ADAPTING THE SOUTH AFRICAN 'ALL MEDIA AND PRODUCTS SURVEY' (AMPS) TO THE REQUIREMENTS OF USERS

This paper deals with two comparatively unrelated themes: the challenge facing print media and how we are attempting to be of assistance; secondly and very briefly it deals with readership and circulation.

Some knowledge of the media situation in South Africa, and of the structure of our organisation, the South African Advertising Research Foundation familiarly known as SAARF, and also of AMPS, one of our major research vehicles, may aid an understanding of what we have been doing recently.

It has been mentioned at previous Readership Symposia that the SAARF membership consists of a combination of all the elements of the advertising/media industry. Our members, represent the advertisers, the advertising agencies and the mass media. Uniquely, we are funded by a levy on virtually all advertising that is carried by these media. Because of the broad base, the levy is comparatively low and painless.

To provide the remainder of the background, I am going to have to use a word which, for this audience, may be a dirty word. That word is television.

Television carrying advertising is a relative newcomer to South Africa. In January 1976 the first scheduled broadcasts commenced. However, the service did not carry advertising in its first two years of life, and even then advertising was limited to 5% of broadcast time. The percentage was increased later, but even today the limit is 8%.

The effect of television advertising on the share of the print media in the advertising cake was drastic. Nevertheless, in terms of actual income if one did not adjust for inflation, the print media managed to achieve an unbroken record of annual increases in income up to 1985.

From the viewpoint of research, a more important change to advertising in the print media, more particularly in newspapers, lay in the sources of their advertising income. Prior to commercial television, about 70% of newspaper advertising income came from national consumer advertisers.

The current situation is quite different. About 70% of that income is derived from local retail advertising. This change had implications for the type of research data which is required to buy and sell advertising space in newspapers.

Let us turn for a moment to some of the information in the AMPS survey reports. In addition to extensive media data, they have always contained extensive sections on the use of fast moving consumer goods, the presence and replacement of a wide variety of large and small durable articles, from motor cars through refrigerators to kettles and toasters. There have also been sections on participation in a variety of activities and the use of financial and other services.

The data could be broken down for geographic areas of various types, ranging from national data to provincial and even to individual major metropolitan areas. Some time ago we were made aware quite sharply that even these possibilities were no longer adequate in the changing environment. The retailer in particular is interested in consumption within a sharply restricted area, such as a group of suburbs or the catchment area of a shopping complex. He wants to know about the consumption in such

an area, not only of products, services and the like, but also of media, with special emphasis on newspapers of all types. I should mention in passing that the electronic media do not yet have localised services serving areas as small as those which are of interest to the retailer.

Furthermore, the retailer is interested in far more detailed information on shopping behaviour and lifestyle patterns, than was available from AMPS up to 1986.

In order to meet the changed requirements of the print media in particular, the nature of the changes which were required were clear and simple to state but much more difficult to achieve. First, we had to increase our sample size drastically, to provide localised subsamples of sufficient size to ensure reliable reporting on individual retail areas. We carefully selected these areas, restricting them by only including such areas where there was significant competition for advertising revenue from retailers, and where two or more newspapers had their primary distribution area. Despite this restriction, the total sample size was effectively doubled. Since a sample of such magnitude was not affordable on an annual basis, we were forced into the situation where the full number of respondents would be achieved over 24 months. Once the new pattern has completed the first 24 months, we will still be able to report annually on the smaller areas using a balanced rolling 24-month sample.

Secondly, we had to extend our questionnaire in order to provide the enhanced shopping and life-style information which was desired. The shopping information is particularly detailed. For a variety of product types, the place where they are purchased is probed in such detail that the questionnaire prompts have to be regionalised. The end result was a questionnaire of such length that we were worried about respondent fatigue, and we seriously considered splitting the interview into two consecutive sessions which would have taken place within a few days of each other.

Fortunately, a very careful pilot study indicated that a single interview was viable, and subjective feedback from the field is reassuring. Nevertheless, we want to reduce its duration in the medium term.

In designing the structure of the enhanced sample and the extended questionnaire, we built upon work which had been done for earlier surveys by one of our major press groups. They called their survey the Retail Data Library.

We have not yet succeeded in obtaining the participation of free sheets in our survey. They represent a growing, nay a thriving sector of the print media.

The large volume of additional information resulting from the enrichment of both the sample and the questionnaire is already proving that the major investment in time, money and effort which they represent, has been worthwhile. This applies to other media also, which are able to use the available data for their own purposes.

It remains for me to deal with the changes to our methods of estimating readership, which have taken place over the past two or three years.

The readership figures reported in AMPS have been a bone of contention for a very long time. In general, criticism has centred around a perception that the readership figures were too high, and that the readers-per-copy figures which were derived from them were unlikely in at least some instances. SAARF took the criticism very seriously and devoted much effort to a search for valid improvements. I shall deal only with the most recent ones.

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In late 1985, a proposal was approved that a project be launched to investigate whether the concept of 'first reading within issue period' could be conveyed to respondents, and to obtain, among other information, data on readership figures using 'first reading', 'recency' and 'frequency'. The project was not intended to provide 'first reading' questions suitable for inclusion in a large scale, ongoing survey.

The results of this study were so promising that it was decided to test different versions of a 'first reading' approach in the context of an ongoing survey. The comparatively large-scale and expensive test was done in early 1987. Since we wanted to incorporate any amendments to the readership section of our questionnaire into ongoing fieldwork without delay, the commencement of fieldwork was held back until the four-way test had been completed and evaluated.

In his presentation of the results of the test, our previous Technical Director, Michael Brown drew three important deductions:

(1) The use of the 'first reading' approach was viable, and the readership figures were more valid than other measures, using circulation as the validator. Significant reductions in average readership could be expected, and the reductions would be larger for magazines than for newspapers but were (for magazines) fairly independent of issue period.

(2) The order of asking about publication groups had been rotated in the test, and this was shown to form a large and significant proportion of total variance. Therefore, in our surveys, we would have to rotate in the same way in order to average out this variance.

(3) Significant variance could be adduced to the changed interview situation. A number of changes from our previous pattern of questioning had been introduced. For instance, a six-month filter question was asked separately for each publication group in the revised questionnaire, whereas previously it had been asked once in respect of all the titles in our publication list. Therefore, only a portion of the changes in the readership levels was attributable to the first reading basis of calculating Average Issue Readership numbers.

One of the four questionnaire variants which had been used in the test was, with the unanimous agreement of all concerned, incorporated into AMPS 87 with minor additional changes to supplementary readership questions. We continued to obtain 'thoroughness of reading' data, and for magazines also 'frequency', 'where read' and 'origin of copy' data.

Table 1 contains comparative data of the readership ratings obtained by the recency and frequency methods in 1985, and by 'first reading within issue period' in 1987. There is an average decrease of about 2.6 readers-per-copy in 1987, compared with 1985.

As such a reduction had been the whole object of the exercise, the results were gratifying. The decrease is larger for magazines than for newspapers, but within the magazine group it appears to be relatively independent of issue period. Despite the reductions there remain readers-per-copy figures as high as 24. The highest RPCs are found for publications aimed at our black population where a high incidence of pass-along readership takes place. Excluding this group, the highest remaining RPC is about 8.8, and this is a farming publication which is considered to have a particularly long life as some readers use it as a reference source.

We also compared the readership figures which would have been obtained had we continued to use 'recency' for newspapers and 'frequency'

Table 1

Comparative publication group readership data from AMPS' 85 using recency for newspapers and 'frequency' for magazines, and from AMPS' 87 using 'first reading'

Publication group	Readership*		RPC		
	'85	'87	'85	'87	Difference
English dailies	2.1	2.0	6.36	6.08	-0.28
Afrikaans dailies	1.1	0.9	5.04	3.95	-1.09
English & Afrikaans weeklies	4.7	3.1	6.88	4.25	-2.63
English weekly magazines	5.8	3.7	11.18	5.71	-5.47
Afrikaans weekly magazines	6.9	4.7	6.56	4.10	-2.46
English & Afrikaans fortnightlies	6.1	3.3	6.92	3.81	-3.11
English monthlies	4.8	2.9	6.41	4.17	-2.24
Black monthlies	10.2	9.2	5.71	11.97	-3.74

*Percentages of the total population who read an average title in the publication group.

for magazines. A striking finding for a few individual magazine titles was that the 'recency' figure was lower than the 'first reading' figure, which reinforces the finding that the changed interview plays a significant role.

I am sure that we are not unique in that we are subjected, at times, to very strong pressures from the often divergent interests of our members. These pressures are often 'political' or self-serving in nature, rather than being based on scientific grounds. This has been true of readership and thus it is gratifying that our latest readership figures have beeen received with acclamation by all concerned. The reaction may not have an entirely objective base, but our method does, and it appears that we are now better serving the needs of the print media.