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CAN WE REALLY EXPECT A SINGLE SOLUTION TO SATISFY ALL OF OUR
NEEDS?

SYNOPSIS

In this paper I have made some observations about the way research is organised and conducted in different countries. The paper addresses the way in which research design is influenced by different economic, practical and market conditions prevailing in those countries. On this basis I have tried to answer the question "to what extent can a single solution be developed to satisfy all our needs", both on a national and multinational basis.

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During the last six years most of my work as a media researcher has been on international projects, including the Pan European Survey in Europe and the Asian Businessman Readership Survey here in Asia. In the course of this work I have become aware of the various readership research practices in each country, as well as been faced with the realities of dealing with established local research methods. This has led me to ask the question why such differences exist in audience research measurement, and has also provided valuable experience when designing our own surveys.

Based on these observations I would like to address the question posed by the title of my paper, that is to what extent can we expect a single solution to satisfy all of our needs. Whilst I have principally discussed this in a national context, I would also like to make some observations about the way in which a single solution can be applied across national boundaries.

I would like to address this issue by looking at four elements of survey research design:

- the universe of people surveyed
- interview method
- sampling method
- questionnaire

By means of introduction, I would first like to make some comments about the context in which audience research is commissioned and conducted.

The two basic tools that a publisher has available to prove the value of his title(s) are firstly circulation data (generally provided by an independent audit system), and secondly data on the penetration and profile of each title compared to its competitors. The latter is generally provided by independent multi-client audience research. The role of such audience research is to provide a reliable, objective and unbiased measure of the audience of publications expressed in terms of average issue exposure, and frequency of reading of the publication, together with the demographic and marketing characteristics of the readers themselves.

This audience research acts both as a means of media planning and selection as well as a being currency for media buying and negotiation. Its role as a currency obviously places a great emphasis on the need for reliable measures and in few other areas of survey research is so much effort invested in the quality of the data collection process.

In any individual country this role will be performed against varying backgrounds in terms of:

- . the absolute level of advertising expenditure
- . the spread of advertising expenditure by media group
- . the structure of the print media market
- . the demand for information
- . the relative cost and efficacy of different research methods
- . developments in research methods and technology
- . the nature of the population surveyed

It is also worth pointing out that changes will occur in any one of these factors over time, ie we researchers must continually re-appraise our solutions in the light of market dynamics.

My first charts examine the top three factors; the last three are more the subject of the body of this paper.

Advertising expenditure in Europe

Table 1 shows that advertising expenditure as a percentage of gross domestic product ranges from a high of 1.4-1.5% in Finland, Spain and the UK, to a low of 0.6-0.7% in Belgium, Italy and Austria.

This means that in the UK and Italy, two markets with similar overall levels of GDP, actual levels of advertising expenditure vary by a factor of two. This in turn will affect the relative amounts of money available for media research in these markets.

In a similar vein we should not expect smaller markets such as Belgium, Finland or Austria to be able to devote as much resources to media research as the UK or Italy.

Table 2 shows that the distribution of advertising expenditure by media also varies significantly by country. Whilst the UK is fairly similar to the European average, the Nordic countries (including Finland shown here) tend to be newspaper dominated, whilst Italy, Spain, Greece and Portugal have higher levels of TV expenditure. These patterns are due in part to historical legislation. As this is gradually changing, we will no doubt see a slightly different picture five years from now, especially for TV.

TABLE 1

Advertising expenditure as a share
of gross domestic product and in total, 1989

		Share	Actual expenditure billion dollars
Highest	Finland	1.5%	1.8
	Spain	1.4%	6.0
	UK	1.4%	11.8
Lowest	Belgium	0.7%	1.1
	Italy	0.6%	5.8
	Austria	0.6%	0.9

Source: Saatchi & Saatchi

TABLE 2

Distribution of advertising expenditure
by media, 1989

	Newspaper	Magazine	TV	Other
All Europe	41%	23%	25%	11%
UK	43%	20%	31%	6%
Italy	24%	20%	47%	9%
Finland	75%	10%	11%	4%

Source: Saatchi & Saatchi

The structure of the print media market

The structure of print media markets varies in terms of the number and size distribution of publications, as well as the nature of those publications themselves.

Table 3 shows the five daily publications with the highest levels of readership in Britain, France and Germany. Whilst in Britain all five are national publications, in Germany four are regionals and in France three are regionals. If in any market regional newspapers are of sufficient importance, their inclusion will have implications for both sample size and its geographical distribution, as well as the length of the media list (and therefore readership techniques).

In Finland for example, the NRS sample of 5,000 is too small to accurately represent the large number of local newspapers. The Finnish Newspaper Society therefore commissioned a separate local newspaper survey, with a large sample of 18,000. I understand that currently discussions are underway with Suomen Gallup (the contractor for the above surveys) to expand their NRS sample to 11,000 in order to include the main local newspapers. This in turn will raise the number of titles measured from 110 to in the order of 140, necessitating a reappraisal of the way in which screening questions could be asked.

Analysis of daily reading patterns hides the fact that different frequency groups of groups of publications vary in popularity by country (see Table 4).

Moving outside the most popular titles, as publishing markets have fragmented (perhaps as a reflection of a more fragmented society) we have seen a greater proliferation of titles. Table 5 shows the frequency distribution of average issue readership levels of the 274 titles reported on in the last annual report of the UK National Readership Survey. Of these titles four were read by more than 20% of the population, over half by less than 2.5% and 120 by less than 1.0%. This clearly has implications for minimum sample sizes and frequency of reporting.

The nature of publishing economics is such that generally low penetration titles would not be profitable in smaller markets. For example a publication read by 1% of people in a country with a population of less than eight million (which includes Austria, Ireland, Switzerland and all four nordic countries), would probably only have a circulation of 10-20,000. Depending on the value of its advertising target group, such a title may not be able to cover costs (unless, perhaps, editorial were sourced from an existing international umbrella organisation).

As shown in Table 6, publications in such markets do generally have higher penetration. This has the fortunate side-effect of requiring smaller sample sizes for a given level of statistical reliability.

TABLE 3

Top 5 daily publicationsFRANCE

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
Ouest France*	2.3
Le Parisien	1.3
La Voix du Nord*	1.2
Sud Ouest*	1.2
Le Figaro	1.2

Source: European Market & Media Fact 1990

U.K.

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
The Sun	10.4
Daily Mirror	8.8
Daily Mail	4.3
Daily Express	3.8
Daily Star	2.6

Source: NRS Vol.1. 1990

West Germany

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
Bild Zeitung	11.0
Hamburger*	1.5
Adenblatt Hannoversche*	1.3
Allgemeine Stuttgarter*	1.2
Zeitung Augsburgener Allgemeine	1.1

Source: European Market & Media Fact 1990

* denotes regional publication

TABLE 4

Top 5 titles regardless of frequency

m = monthly

w = weekly

d = daily

FRANCE

<u>Title</u>	<u>AIR millions of readers</u>
Tele 7 Jours (w)	11.3
Femme Actuelle (w)	7.8
Tele Poche (w)	7.4
Tele Star (w)	6.3
Prima (m)	5.1

Source: European Market & Media Fact 1990

U.K.

<u>Title</u>	<u>AIR millions of readers</u>
News of the World (w)	13.2
Sunday (w)	12.6
The Sun (d)	10.4
Sunday Mirror (w)	9.3
Sunday Mirror Magazine (w)	8.9

Source: NRS Vol.1. 1990

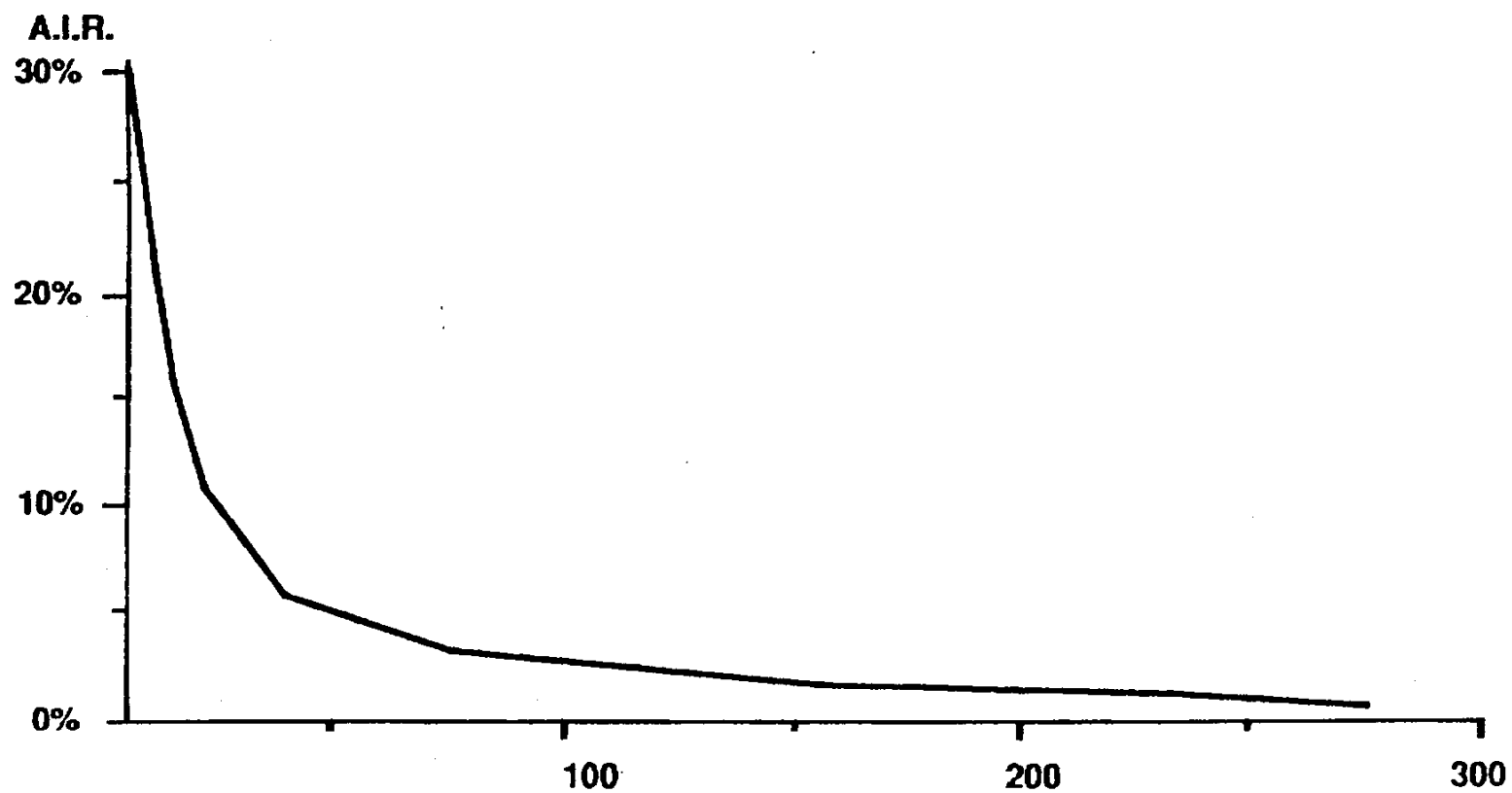
WEST GERMANY

<u>Title</u>	<u>AIR millions of readers</u>
ADAC Motorwelt (m)	13.6
Bild Zeitung (d)	11.0
Horzu (w)	9.9
Bild am Sonntag (w)	9.5
Stern (w)	7.7

Source: European Market & Media Fact 1990

TABLE 5

Distribution of average issue readership levels
in the UK National Readership Survey



Source: NRS July 1989 - June 1990

TABLE 6

Top 5 Publications Regardless of Frequency

m = monthly

w = weekly

d = daily

NORWAY

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
Verdens Gang (w) (Saturday)	1.6
Media Riks (38 locals)	1.3
Verdens Gang (weekday)	1.2
Hiemmet (w)	1.1
Dagbladet (Saturday)	1.1

Source: European Market & Media Fact 1990

SPAIN

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
Pronto (w)	4.4
TP: Teleprograma (w)	3.7
El Pais Suplemente (w)	3.3
Suplemento Semana	2.6
Hola (w)	2.6

Source: European Market & Media Fact 1990

SWEDEN

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
FLT - Riks (63 locals)	2.7
Vi i Villa (5 p.a.)	2.6
Expressen (d)	1.5
ICA Kurien (w)	1.3
Aftonbladet (d)	1.1

Source: European Market & Media Fact 1990

U.K.

<u>Title</u>	<u>AIR</u> <u>millions of readers</u>
News of the World (w)	13.2m
Sunday (w)	12.6m
The Sun (d)	10.4m
Sunday Mirror (w)	9.3m
Sunday Mirror Magazine (w)	8.9m

Source: NRS 1990 Vol 1

A further complexity in the publishing market has arisen in recent years in Britain with the introduction of new print technology. This has allowed the production of newspapers in several sections. A special study of sectional readership patterns was published in 1988 (reported on in the last Symposium). Table 7 shows the extent to which levels of readership vary for individual sections, amongst average issue readers of those publications. In both cases the business section scores lowest, read by a half of all readers, (higher amongst men). A further development has been the change in importance of Saturday editions (studied in 1990), reflecting an increasingly competitive publishing market in Britain.

Both of these developments lead to a demand for a greater depth of data, both from advertisers to assess the cost efficiency of publications, and from publishers to assess the success of their products. This has also been matched by developments in computer technology, allowing media planners to hold and process larger amounts of data. As researchers, this poses the problem of how to provide more information, without jeopardizing the quality of our basic measures of recency and frequency of readership.

(A contrary development can be observed at the senior level of client management where the need is for more succinct and rapid reporting. This no doubt reflects the increasingly competitive nature of the media environment).

Having outlined the factors providing the background to audience measurement, I would now like to draw on those elements of survey design over which we researchers have some level of control. These include the universe of people surveyed, the interview method, sampling and question technique.

The universe of people surveyed

The universe of people surveyed is perhaps the most straightforward aspect of survey design. Whilst most national readership surveys cover all adults, in some cases this scope is restricted for reasons of cost, practicality or due to the homogeneity of the population surveyed.

For example, at one stage in Britain, the area north of the Caledonian canal in Scotland (which is very sparsely populated) was excluded due to the cost of sending a fully trained interviewer to work there. In France it is the practice in some surveys to reduce the sample size in rural areas (France has a significant, but highly dispersed rural population), and weight results back accordingly.

When covering specialist target groups, for example businessmen or high status individuals, the incidence of such groups will vary according to the status of the area or sampling point. On grounds of costs, therefore, it may not be feasible to represent those individuals in areas of lower status and concentration (where for example only 1 in 40 households contains an eligible).

TABLE 7

Any readership of individual sections, within
Sunday newspapers

	The Observer Sample: 211		The Sunday Times Sample: 439
News & Sport	92%	News & Sport	93%
World News	82%	Week in Review	74%
(Arts) Review	83%	Arts & Leisure	80%
Business	49%	Business	52%

Base: All Average Issue Readers

Source: How Quality Sunday Newspapers are Read
Conducted by RSL on behalf of the Sunday Telegraph

In terms of practicality it is common practice for there to be a small number of "no-go" areas which, for example in Britain, the police advise interviewers to avoid. At the opposite end of the scale it is important to be aware that some very high status areas can be difficult to interview in, and may therefore be replaced or excluded. The extent of this varies by country, in accordance with the nature of housing stock, although both in the UK and elsewhere in Europe there is an increasing tendency for people to have protected entry systems. We encountered this at its most extreme in Latin America when we investigated the feasibility of conducting a personal interview survey amongst high status individuals. The extent of household security made personal interviewing more or less impossible in some areas.

Other practical considerations relate to interviewing old people, ethnic minorities or other sub-groups who are not fluent in the predominant local language, the latter including Welsh and Gujarati in Britain. I will not comment on those here.

The nature or homogeneity of the population is perhaps most clearly illustrated by Indonesia, where the Media and Marketing survey concentrates on major cities. Whilst it is certainly the case that fully national representative sampling in Indonesia is difficult (but not impossible) it is also the case that media consumption patterns, disposable income levels and the whole way of life is different in rural areas. This segment of the population is, on balance, of lesser interest to marketers, and therefore a valid exclusion.

A historical case is the exclusion of Northern Ireland from the British National Readership Survey (NRS). A number of considerations, such as different newspaper distribution patterns the fact that it is combined with the Irish Republic for the marketing of some products makes its inclusion ambiguous. From a practical point of view, whilst Belfast has a few more 'no-go' areas than the rest of the UK, though most major research companies can and do conduct fieldwork there.

Interview methodology

Most large market research companies will have the capacity to conduct research using personal, telephone or postal interviews. At RSL we have used all of these methods for audience measurement. As well as considering the cost and time budget available, our choice of methodology is influenced by the level of data required, the universe surveyed and the efficacy of each technique.

For most purposes postal research tends to have the lowest cost per interview, and we obtain good response rates (50%) using this method amongst senior businessmen - a group typically difficult to reach by personal interview. However this method has the disadvantage of requiring a small questionnaire. This forces us to restrict the number of titles measured to 40 in each country on the European Businessman Readership Survey, as well as restricting the amount of marketing data collected. This method also tends to be less successful amongst the general population, although it is perhaps true that in countries with a more developed and egalitarian education system (eg. Sweden and Japan) 'form filling' is accepted by the population in general.

At RSL we tend to use telephone surveys for specialist business universes and quick turnaround nationally representative readership surveys, both of which have short media lists. The lower cost per interview clearly makes telephone an attractive method in those countries with a high telephone penetration. This is especially true in smaller countries where the lower absolute level of advertising expenditure means the budget available for research is also smaller.

The reduction in computer hardware costs in the early 1980s made computer assisted telephone interviewing (CATI) economically feasible, and allowed use of sophisticated filtering possibilities and fast data turnaround. Use of CATI is highly developed in the Netherlands and has no doubt been a major factor in the popularity of the First Reading Yesterday method there.

Apart from the obvious disadvantage of not being able to use visual prompts, the main problem encountered with telephone interviewing is in collecting large amounts of data whilst maintaining a high response rate. On balance this is best achieved by use of personal interview.

The popularity of personal interviewing itself does vary by country. For example in Sweden, the fact that both postal and telephone interviewing work well, combined with the high cost of employing and sending interviewers to remote parts of the country, means that fewer surveys now employ personal interviewing techniques there. As it is used less, fieldforces become more expensive to maintain or reduce in size, affecting the cost and availability of this method. Indeed our Swedish associate regularly discourages us from using personal interviews, and certainly charges quite a lot for them!

Sampling method

The range of sampling methods on the various national readership surveys includes pre-selected, random route and quota. The precise application of these also varies.

During 1990 we visited all three Portuguese agencies which conducted a national readership survey (our aim was to select a partner for our IRIS network and a supplier for a number of forthcoming surveys). Whilst all three agencies employed personal interviewing the basic sampling methodologies varied. It was clear that having three surveys competing for limited funding had affected the technical quality of the sampling. It is perhaps a sad truth that in such a situation the limited resources would tend to be devoted to generating a larger number of interviews (an easily marketable product plus), rather than improving the quality of the sample. Since then, one supplier has withdrawn from the market, and I hope that this will allow improvements to be paid for.

The choice between pre-selected, random route and quota sampling will, of course, be determined by the availability of census lists and quality small area data for setting quota targets.

In France the quality of the INSEE national statistics has led to a high level of confidence in the quota method, and the majority of research uses quotas. This is such that many research agencies do not have extensive experience of random route sampling.

Whilst I am not familiar with the quota controls used on CESP, it is certainly the case in some surveys conducted in France (together with others in Portugal and Ireland) that the level and nature of quotas set is inappropriate. The problem occurs when quotas are set according to occupation and socio-economic status in medium and large cities (Paris included). The data available for quota targets was, until recently, only available on a city wide basis - thus the same occupational quotas are set for both high and low status areas. This not only gives interviewers a difficult field task but distorts the sample representativeness when you are forced to look for higher social status people in low grade housing areas.

The availability of small area geodemographic classifications systems, such as Mosaic and Acorn in the UK are a significant help in such cases, especially when differential sampling is required. Such systems are now becoming more widely available, for example in France and Germany. It is worth noting from UK experience that the nature of any one group, eg 'affluent semi-detached housing' may vary by survey region within country, for example if we were predicting income levels or occupation.

Question techniques

I would like to examine the issue of readership question techniques by reference to the Pan European Survey, the PES. The PES uses a personal interview technique to collect readership and marketing information amongst a universe of high status individuals. The survey uses a common readership technique, in the case of the last survey, across 13 European countries. (Describe readership method)

A major factor in the survey design is to produce a methodology which will work with interviewers trained in different local practices. This is one reason why the method employed is specific to this survey, rather than imported directly from another survey. For example, use of a masthead booklet means that we can specify and control the rotation versions used at the screening stage, a practice which varies in use by country.

Whilst use of a simple technique is obviously desirable under any conditions, for a survey such as PES - conducted once every three or four years - it is not possible to invest the amount of time and money involved in training interviewers to the level required by the complex and detailed procedures employed in many national readership surveys. However, the fundamental principals employed in this survey do cross national boundaries, and there is no reason to think they should not apply in a total population survey.

Having outlined the practical considerations I would like to make one last point regarding the way in which surveys are organised.

Systems of surveys

In most markets media planners will have direct computer access to a number of surveys. In Britain the NRS is supplemented by the Target Group Index, which provides extensive marketing classification data.

Separate studies cover specific universes eg. BMRC for businessmen and JICMARS covers doctors.

The Saturday Readership Survey measured readership by day of week, and a database of regional surveys has been created.

In most large advertising markets similar systems of surveys exist, based around a core, quality national readership survey. The role and objectives of a national readership survey are to some extent influenced by those other surveys, but furthermore such surveys allow some of the data burdens to be removed from the NRS.

So, in summary, to come to the question posed at this symposium... 'what survey would we recommend for Ruritania?'

Based on the above observations it is clear that real differences in the costs and practicalities of conducting research, together with the size and nature of print media markets means that a single technical model, in all aspects is unlikely to be the optimal solution for any one country. This does not mean, however, that we cannot derive some fundamental truths about order effects, wording of frequency questions, filters and frequency questions.

In any one country a quality survey is required to provide an accurate measure of the size and basic composition of the audience of publications. Whilst in smaller advertising markets this single survey will need to bear the burden of all media planners data requirements, as advertising markets grow and become more complex a system of surveys develop. In such markets the question 'how can we design the best (single) survey' expands to 'how can we build a system of surveys to help us plan advertising'.

As publishing markets and research technology develop, changes take place in both the problem which research needs to address, and the means by which it can tackle these problems. It is my belief not only that a single optional solution does not exist, but also that increasingly, the research we design today may well not be the best solution for our needs in five years time. And that is why we are here today.

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