

Neil Shepherd-Smith
Telmar Group Inc.
London, UK.

VOX POPULI - AN INVESTIGATION INTO THE NEEDS OF NRS USERS

A paper presented at the Fifth International
Readership Research Symposium - Hong Kong 1991

Synopsis

The paper describes the study carried out on behalf of the U.K. Media Circle and the Media Research Group during the early part of 1990 among the users of the National Readership Survey. The study took the form of personal interviews with publishers and advertising agencies, followed by a detailed questionnaire sent to all users.

The results of the survey provide a valuable picture of what users of a readership survey really want. The report is divided into ten sections as follows:-

1. Current and future use of NRS data
2. Current and future use of NRS reports
3. Post-survey analysis of NRS data
4. NRS data adjustment
5. Additional data needs
6. Additional surveys
7. Miscellaneous technical items
8. Attitudes to the NRS
9. Attitudes to JICNARS
10. JICNARS structure and funding

With the enormous amount of information resulting from this ambitious and detailed study, the report is too large to be reproduced in its entirety for this Symposium. The paper is therefore confined to a brief description of the research method and a summary of sections 5, 8, 9 and 10. For those who are interested, the complete report and full results of the survey are available from the U.K. Media Circle or Media Research Group.

1. Introduction

There has recently been some criticism throughout the U.K. advertising industry of certain aspects of JICNARS in general and of the National Readership Survey in particular. To provide a forum for discussion, the Media Circle and the Media Research Group (both U.K. advertising agency-based associations of media executives) jointly organised a special meeting in July 1989 for all those interested. It became clear from that meeting that, although there appeared to be a wide range of strongly-held and in some cases vehemently-expressed views, it was extremely difficult to gain a clear picture of what the industry really needed from its readership research.

Following the meeting, the Media Circle and Media Research Group appointed a joint Working Party, consisting of representatives of both organisations. The task of the Working Party was to ascertain from users of the National Readership Survey what they thought about the survey itself and JICNARS in general and to establish as far as possible the likely needs of the industry in the future. JICNARS gave its approval to this course of action, expressed great interest in the results of what was clearly an independent initiative and generously made a contribution towards the cost of the research; from that point onwards, the Chairman of the JICNARS Technical Sub-Committee attended Working Party meetings as an observer.

The Working Party decided to employ a consultant with a brief to produce a report describing the current and future needs of National Readership Survey users and Neil Shepherd-Smith of Telmar was duly appointed. The brief for the investigation was "to investigate the needs of users of industry readership research, now and in the future, and to produce detailed actionable data to add to the industry debate on the future of JICNARS". To achieve that aim, the research initially took the form of detailed interviews with executives from publishers and advertising agencies. The project was subsequently expanded to the extent of sending a detailed questionnaire to all users of the NRS. The results of the research are contained in a report issued in October 1990, which was divided into the following sections:-

1. Current and future use of NRS data.
2. Current and future use of NRS reports.
3. Post-survey analysis of NRS data in electronic form.
4. NRS data adjustment.
5. Additional data needs.
6. Additional surveys.
7. Miscellaneous technical items.
8. Attitudes to the NRS.
9. Attitudes to JICNARS.
10. JICNARS structure and funding.

The report is too large to be reproduced in its entirety for this Symposium, so this paper is confined to a brief description of the research method and a summary of sections 5, 8, 9 and 10. For those who are interested, the complete report and full results of the survey are available from the U.K. Media Circle or Media Research Group.

2. Research method and sample

The Working Party agreed that the basic research method should consist in the first instance of detailed personal interviews with executives selected from a sample of publishers and advertising agencies, carefully selected by the Working Party to reflect a representative cross-section of the industry.

The sample was drawn from newspaper publishers, magazine publishers, the top 20 agencies, top 21-100 agencies and media independents:-

The sample as originally selected

Newspaper publishers	10
Magazine publishers	20
Top 20 agencies	10
Top 21-100 agencies	10
Media independents	10
	--
Total:	60

In each case, the people to be interviewed were those involved in the day-to-day use of the National Readership Survey, either as an aid to marketing a newspaper or magazine or for planning or buying space. It was arranged, as far as possible, to carry out joint interviews in each company, seeing all informants at once. Not only did that save time but it was also found that in such a joint discussion people tended to "spark each other off" and to generate views which might otherwise have been left unexpressed. Moreover, if one person said something which was categorically denied by a colleague, it was possible to resolve the matter there and then, without having to conduct repeated conversations. Notes were taken of all interviews to form the basis of this report; as a precaution, the notes were backed up with a tape recording in each case. With so many interviews as the source material, the report of necessity consists to a great extent of summaries or paraphrases of the expressed views of the respondents. However, where appropriate, particularly apposite comments are quoted verbatim.

At the outset, the interviews were left quite deliberately "open-ended" in the hope that informants would reveal the issues that they felt to be really important. However, the Working Party provided a brief as to subjects which ought to be covered, so that the conversation could be steered round to certain topics if they did not arise naturally. It was felt important to try to find out what data are used, what are not used and what other information the interviewees needed in order to do their job. So if they did not mention it, then they would be asked about such items as section readership for newspapers, day of week readership and qualitative questions, using the IPA proposals as examples. The Working Party were also interested in people's attitudes to JICNARS and the NRS in particular.

At the start of each interview, an attempt was made to remove four potentially inhibiting factors. Firstly, and perhaps most importantly, all interviewees were assured that the conversations would

be unattributable and that any views they expressed would not be identified as originating from themselves or their company without their express written permission. Secondly, the informants were told not to worry about HOW their data needs were to be satisfied, but simply to say what such needs were. Thirdly, people were instructed not to be concerned with the potential cost of any service that they might want but at that stage to state their requirements as if it were an ideal world where everything were possible. Finally, they were asked not to be concerned with the political aspects of any topic. For example, if some agencies or publishers were to express a need say for qualitative data that others might feel would not be entirely helpful, then it was important that the report should faithfully record both views, which should therefore be expressed as clearly and unambiguously as possible. However, it was not part of the brief for the report to express any opinion as to the desirability or otherwise of any particular need, but simply to record that such needs existed.

As the interviews progressed, two things became clear. Firstly, several other topics, not originally mentioned by the Working Party, were spontaneously raised by several interviewees. While such topics were interesting and well worth discussing, it was not of course possible, (without time-consuming and expensive re-interviews), to obtain the views of companies already interviewed because the subjects had not necessarily been raised then. Secondly, it became clear that there was a surprising consistency of views throughout the industry on many topics and successive interviews were tending to produce the same answers. The Working Party therefore took the view that, as at that point, 13 agencies and 15 media-owners had been visited, then, rather than spend time on further interviews, it would be better to prepare and circulate a detailed questionnaire to all users of the NRS.

The use of the questionnaire, which was approved in detail by the Working Group, meant that ALL subscribers would be given the opportunity to express their views on ALL the topics that had been raised during the interviews. There was also a further benefit in that the opinions of the respondents could be quantified in the report, rather than being expressed only in the form of verbal summaries.

In February 1990, one questionnaire was sent to each company, (125 agencies and 107 publishers) addressing it in each case to a senior executive and asking him or her to complete the form on behalf of the company in each case. Reflecting the depth of detail covered by the investigation, the questionnaire was an inevitably lengthy document (as several informants who completed it helpfully pointed out!) covering many aspects of the usage of the NRS. The response was as follows:-

	<u>Questionnaires</u>	<u>Replies</u>	
Agencies	125	56	= 44.8%
Publishers	107	48	= 44.9%
	---	---	
Total	232	104	= 44.8%

The respondents seemed to come from all sides of the industry, from small and large companies alike; the sample did not appear to be

biased in terms of type or size of company. There was moreover, as can be seen from the figures above, a remarkably similar response rate of about 45% in each case from agencies and publishers. One cynical comment was that the sample had clearly been well balanced to reflect apathy equally on both sides of the industry!

Once the completed questionnaires were returned, they were checked for completeness and internal consistency. Where possible, they were also checked for consistency against the notes of the original interview. In all cases where there appeared to be a discrepancy of any kind, the matter was resolved by means of a telephone call to the respondent.

The results of the survey formed the basis of the report. It will be noted that an undertaking was given in the questionnaire to all respondents that all the information and opinions they provided would not, without their written permission, be identified as originating from their company. Throughout the report, care was therefore taken to preserve the anonymity of respondents and all verbatim quotations are unattributed. The responses to the questionnaire are summarised into two simple sub-groups, agencies and publishers, and all the tables in the report are provided on that basis. It would of course be technically possible to analyse the results by further breakdowns (e.g. by Newspaper publishers, Magazine publishers, large agencies, small agencies) but there are no firm plans to do so at the time of preparation of this document. An extract from the questionnaire, covering the four sections of the study dealt with in this paper, can be found in the Appendix.

All results of the survey are expressed as percentages, rounded to the nearest whole percentage point. This practice of course means that sometimes the components of a table may appear to sum to 99% or 101% but the author of this document would be grateful not to receive correspondence pointing out this phenomenon.

3. Additional data needs

During the interviews, the ideas for additional data were many and varied. The need for what was often referred to as "qualitative" data in fact turned out to be a need for quantified factors to be applied to average-issue readerships. In some cases, it was suggested that the average-issue measure itself should be expanded, for example to cover the different sections of a newspaper rather than just any part of it. As the needs for additional data were so wide-ranging, perhaps the best way to deal with this part of the investigation would be to look at each of the suggested additional data items individually.

3.1 Readership of newspaper sections

During the interviews, many agencies said that different sections of newspapers should be regarded as separate titles and the average-issue readership established accordingly in each case. It was pointed out that those who read say the book page of a Sunday newspaper might have very different characteristics from those who read the business or sports pages and it was felt that different readerships might well be reflected in different space rates. The subsequent survey showed that 100% of agency respondents were in favour of obtaining readership estimates for newspaper sections and incidentally that was the only question in the survey to achieve 100% agreement from agencies. 60% of publishers also tended to agree with the need for newspaper section readership and only 12% of publishers were actually against the proposition with a further 27% who did not mind.

(Q. 5.1.) Readership of newspaper sections

	Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
	%	%	%	%	%
Agencies (56)	0	0	0	4	96
Publishers (48)	6	6	27	31	29
-----	--	--	--	--	--
Total (104)	3	3	13	16	65

During the interviews, it was emphasised time and again that "sections" were not just thought of as separate sections identified as such but as any "part" of a publication dealing with an identifiable subject e.g. "the sports pages" or "the cookery section". As one person put it:- "Look, I know what the "Women's page" or the "City pages" are, whether they are in a separate section or not. People are quite capable of saying whether or not they read bits of a newspaper dealing with a certain subject or interest." No doubt those having to design the research to ascertain section readership might not feel that the task was quite that easy but the view expressed was widely held.

3.2. Readership of magazine sections

Many people thought that the principle of separate "section" readership could be extended to magazines as well as newspapers but it was not considered to be quite so important. Nevertheless, 87% of agencies were in favour and none against the idea while 56% of publishers were in favour with only 14% opposed to the suggestion.

(Q. 5.2.) Readership of sections of magazines

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	0	13	39	48
Publishers	(48)	10	4	29	23	33
-----		--	--	--	--	--
Total	(104)	5	2	20	32	41

3.3. Readership by day of week

During the interviews, the point was often made that the editorial approach of many daily newspapers meant that the Saturday issue of a given newspaper may well be a different vehicle from the Monday to Friday issues and could therefore appeal to a correspondingly different readership.

(Q. 5.3.) Saturday/weekday readership for newspapers

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	0	2	16	82
Publishers	(48)	2	10	44	25	19
-----		--	--	--	--	--
Total	(104)	1	5	21	20	53

The survey results show the strong support among agencies for separating readership of Saturday newspapers; moreover, only a small percentage of publishers were actually opposed to the idea. As might be expected, distinguishing Saturday from weekday magazine readership was not felt to be so important, although 63% of agencies claimed to be in favour.

(Q. 5.4.) Saturday/weekday readership for magazines

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	4	2	32	27	36
Publishers	(48)	6	13	46	15	21
-----		--	--	--	--	--
Total	(104)	5	7	38	21	29

A point should be noted. With the benefit of hindsight, the questionnaire could be regarded as confusing in that it does not clearly distinguish between (i) the readership (on any day) of the Saturday issue of a newspaper and (ii) the readership on a Saturday of any issue of a newspaper. During the interviews, respondents invariably referred to the Saturday issues of a newspaper and the survey results may be felt to reflect that; moreover, as daily newspapers are usually assumed to be read on the day of issue, the point may be largely academic. With monthly magazines however, the day of issue is variable and indeed irrelevant and respondents are therefore probably thinking more about the day that the magazine is read. In general, the results of questions 5.3 to 5.6 inclusive should be treated with caution and perhaps taken merely as a general indication of the widely-held view that the day of week, of publication or readership, is important.

VOX POPULI - AN INVESTIGATION INTO THE NEEDS OF NRS USERS

Many people, particularly in agencies, felt that, as well as Saturday readership, it would be very valuable to know the readership of newspapers published on each day of the week, not just Saturdays. However, some newspaper executives initially reacted with horror, typified by one who said:-

"If the agencies found out that we had fewer readers on Mondays, then they would pay less!" One of his colleagues took a more positive line and replied:

"Well, in that case we would charge them more for Fridays and it would average out the same!"

The optimists seem to be in the majority, judging by the results of the survey, which showed that only 18% of publishers were against the idea of establishing newspaper readership by day of week and 86% of agencies were in favour.

(Q. 5.5.) Readership by day of week for newspapers

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	2	13	34	52
Publishers	(48)	10	8	44	25	13
-----		--	--	--	--	--
Total	(104)	5	5	27	30	34

As might be expected, (and allowing for whatever was understood by a confusing question!) the provision of readership by day of week for magazines was supported by only 45% of agencies and 34% of publishers.

(Q. 5.6.) Readership by day of week for magazines

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	5	4	46	25	20
Publishers	(48)	13	15	40	19	15
-----		--	--	--	--	--
Total	(104)	9	9	43	22	17

3.4 "Quality of reading data"

During the interviews, there was a great deal of interest expressed in "qualitative data", in the sense of refining average-issue readership estimates in ways likely to reflect the level of respondents' potential exposure to advertising. In many cases, it was found convenient to discuss the subject on the basis of the proposals prepared by Tom Corlett on behalf of the IPA, (issued as document 4014A on 30th January 1989), which provided a valuable summary of possible options. Corlett referred to the classification of responses used in the "Survey of Magazine Audiences", Spring 1987, by Mediamark Research Inc. USA, and those classifications were very helpful in giving an indication of the level of detail that might be envisaged. Corlett suggested that the possibilities could be broadly categorised into four options:- (i) Place of reading, (ii) How copy was obtained, (iii) Time spent reading and (iv) Disappointment if publication stopped. These subjects are discussed in more detail below.

3.5 Place of reading

The M.R.I. questions included the following classifications for place of reading data:- "At doctor's or dentist's, at beauty parlour, hairdresser's or barber's, at library, club or school, in business reception room, while travelling to/from work, on an aeroplane, during other travelling, at work, at a shop or news-stand, in someone else's home, in your own home, somewhere else". With those classifications in mind, respondents were asked whether they needed such place of reading data on the NRS.

(Q. 5.7.) <u>Place of reading</u>		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies (56)		0	4	25	30	41
Publishers (48)		15	8	10	29	38
-----		--	--	--	--	--
Total (104)		7	6	18	30	39

As can be seen, about two-thirds of respondents, spread fairly evenly between agencies and media owners, were in favour of such data.

3.6 How copy was obtained

Again, the M.R.I. classifications were used as a guide:-

- From a friend, neighbour or relative not living in this household.
- At a hairdresser's, doctor, dentist, library, school, office, etc.
- On an aeroplane, train, bus etc.
- Received on subscription in my name.
- On subscription in the name of another member of my household.
- On joint subscription in the name of me and another.
- I myself purchased it at a newsagent's or shop.
- Another member of my family bought it at a newsagent's or shop.

Respondents were then asked whether they needed "how copy obtained" data on the NRS.

VOX POPULI - AN INVESTIGATION INTO THE NEEDS OF NRS USERS

(Q. 5.8.) How copy was obtained

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	2	16	32	50
Publishers	(48)	4	6	19	19	52
-----		--	--	--	--	--
Total	(104)	2	4	17	26	51

As can be seen, source of copy data were regarded as even more important than place of reading. The agencies, of whom 82% were in favour, were particularly interested in "primary readership" and 71% of publishers also felt that the data would be valuable.

3.7 Time spent reading

During the interviews, a great deal of discussion took place on this subject. To know how long was spent reading a publication was in general felt to be very valuable; however, some publishers were firmly against the idea and more than one made the point that it was meaningless to compare the time spent reading a tabloid newspaper with a quality newspaper, or to compare a glossy monthly magazine crammed with editorial with a weekly magazine with substantially smaller pagination. An alternative suggestion was therefore to measure the proportion of the issue read and both questions therefore appeared in the questionnaire to find out whether NRS users needed such data. On the whole, a question in the form of the "time spent reading in minutes" found more favour with agencies than with publishers.

(Q. 5.9.) Time spent reading in minutes

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	2	9	43	46
Publishers	(48)	13	8	6	25	48
-----		--	--	--	--	--
Total	(104)	6	5	8	35	47

Respondents were also asked whether they needed, as an alternative or an addition to the time spent reading in minutes, data relating to the proportion of issues read.

(Q. 5.10.) Proportion of issue (% of pages) read

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	4	2	16	30	48
Publishers	(48)	8	8	8	35	42
-----		--	--	--	--	--
Total	(104)	5	6	13	33	45

It will be seen that this option was preferred by more publishers (77% as opposed to 73%) but fewer agencies (78% as opposed to 89%). No doubt, the best method of establishing how thoroughly a publication is read will be the subject of further debate.

3.8 Attachment to a publication

To ascertain the level of attachment to a publication, Corlett suggested a question along the lines of "Suppose Practical Lovemaking stopped publishing. How disappointed would you be? (a) Very, (b) Moderately, (c) Only a little, (d) Hardly care". During the interviews, the reaction to the suggestion of a question of this sort varied from moderate enthusiasm through bewilderment to joyous and unrestrained derision. The replies to question 5.11, asking whether users needed a publication attachment question like that on the NRS, showed that only 50% of agencies were in favour and that publishers fell into equal groups of those in favour, those against and those that don't mind.

(Q. 5.11.) Attachment to a publication

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	9	14	27	30	20
Publishers	(48)	27	6	33	23	10
-----		--	--	--	--	--
Total	(104)	17	11	30	27	15

3.9 Readership accumulation over time

During the interviews, it became clear that not all the interviewees had thought about the fact that the current NRS readership measure takes no account of how readership is built up over time and that where there are several readers per copy the total readership is likely to take weeks or even months to accumulate. Those, particularly in agencies, who had already thought about the matter tended to feel that the issue was extremely important; those who had just been exposed to the concept were inclined to agree and several wondered why they had not thought about it before.

The concept was included in the survey (question 5.12) with the following explanation.

"Issue readership accumulation over time

The current NRS readership measure gives an estimate of the total readership of an average issue of a publication but does not give any indication as to how such readership is built up over time. Where there are several readers per copy, each reader will take time to read the issue and then pass it on; thus the final readership may take weeks or even months to accumulate. This phenomenon may be thought to be sufficiently important for JICNARS to research, probably in a study (e.g. a panel) separate from the main NRS..... Do you need JICNARS to provide data on issue readership accumulation over time?"

(Q. 5.12.) Issue readership accumulation over time

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	0	4	7	45	45
Publishers	(48)	2	8	25	44	21
-----		--	--	--	--	--
Total	(104)	1	6	15	44	34

It is clear from the results that this topic is becoming an increasingly important issue, with 90% of agencies and 65% of publishers being in favour of JICNARS providing issue readership accumulation data (though not necessarily as part of the NRS).

3.10 Additional titles

Worries were expressed during the interviews that the NRS questionnaire might be in danger of becoming overloaded. The majority view appeared to be that it was felt to be vital to collect qualitative data but, to make room for those questions, the product data should be dropped and there should be no question of adding additional titles. That view was confirmed by the results of the survey and it can be seen that more respondents, both agencies and publishers, are against adding more titles than are for it.

(Q. 5.13.) Additional titles or groups of titles on the NRS

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	32	4	39	9	16
Publishers	(48)	35	2	42	6	15
-----		--	--	--	--	--
Total	(104)	34	3	40	8	15

Respondents who were in favour of additional titles were asked to write in the names. Among agencies, only "Business" (mentioned by 5 agencies), "Individual regional newspapers" (5) and "Youth" (2) were mentioned by more than one agency. Among publishers, only "Business" (2) was mentioned more than once.

3.11 Other data

Following this line of thought, respondents were then asked whether they needed any other information on the NRS.

(Q. 5.14.) Other data on the NRS

		Strongly against	Mildly against	Don't mind	Mildly in favour	Strongly in favour
		%	%	%	%	%
Agencies	(56)	32	0	52	7	9
Publishers	(48)	21	2	54	4	19
-----		--	--	--	--	--
Total	(104)	27	1	53	6	13

Only 19% of respondents were in favour of any other data. As before, those in favour were asked to write in details; among agencies, no item was mentioned more than once but, among publishers, three suggested collecting data on multiple pick-up of publications, which might be thought to be a good idea well worth further consideration.

3.12 Ranking of suggested data items

With so many items of data discussed at the interviews and included in the questionnaire, it is possible that not all of them could be actioned in the immediate future; it is more likely that progress will be made with some items at the expense of others. To give some guidance as to the relative importance to the NRS users of the various data items that they had claimed to be in favour of, each respondent was asked to rank each such request in order of importance to himself or herself. The results were then aggregated and then expressed as indices based on 100 being the most important data item in each case.

Relative importance of additional data items requested. (Index: 100)

(Question)	Agncys	Publish	Total
5.1. Readership of newspaper sections	100	71	100
5.2. Readership of sections of magazines	66	68	74
5.3. Saturday/weekday readership for newspapers	80	44	75
5.4. Saturday/weekday readership for magazines	34	39	40
5.5. Readership by day of week for newspapers	67	42	65
5.6. Readership by day of week for magazines	22	38	31
5.7. Place of reading data	52	89	74
5.8. How copy was obtained	61	99	84
5.9. Time spent reading in minutes	70	96	89
5.10. Proportion of issue (% of pages) read	57	100	82
5.11. Attachment to a publication	36	40	42
5.12. Readership accumulation over time	66	81	80
5.13. Additional titles	13	20	17
5.14. Other data	8	24	16

The figures are self-explanatory but it can be seen that, for the agency respondents, "Newspaper section readership" (100) is by far the most important, followed by "Saturday/weekday readership for newspapers" (80), then (grouped closely together) "Time spent reading in minutes" (70), full "Day of week newspaper readership" (67) and "Readership accumulation over time" (66). For publishers, the order of importance is slightly different and the difference in relative importance is by no means so dramatic but the "Proportion of pages read" (100) comes just first, followed by "Source of copy" (99), "Time spent reading in minutes" (96), "Place of reading" (89) and "Readership accumulation over time" (81). The two items that are common to the top five choices of agencies and publishers are "Time spent reading" and "Readership accumulation over time".

3.13 Provision and frequency of qualitative data

Some discussion took place during the interviews as to whether the provision of qualitative data should take place as part of the main survey or as a separate study. The agencies were happier than the publishers that the data could be derived from a separate study and then be used as factors to apply to readership data from the main survey. As can be seen from the results of question 5.15 below, the publishers much preferred that all data should be collected at once. For some reason, this question had a higher percentage than any other of non-replies, with 7% of agencies and 15% of publishers either unwilling or unable to commit themselves on this issue.

(Q. 5.15.) Provision of qualitative data

		Main survey	Separately	No reply
		%	%	%
Agencies	(56)	52	41	7
Publishers	(48)	69	17	15
-----		--	--	--
Total	(104)	60	30	11

There was a similar though less pronounced effect to be observed with the answers to question 5.16 as to how often qualitative data should be collected; 5% of agencies and 13% of publishers did not reply. However, a clear majority felt that such data should be collected on a continuous basis.

(Q. 5.16.) Frequency of qualitative data provision

		Continuously	Biennially	Ad hoc	No reply
		%	%	%	%
Agencies	(56)	64	5	25	5
Publishers	(48)	71	8	8	13
-----		--	--	--	--
Total	(104)	67	7	17	9

In view of the enormous amount of interest expressed in qualitative data during the interviews, it is perhaps somewhat ironical to mention one comment made by an agency planner who said somewhat wistfully "Do you know, there was some good qualitative stuff in MPX; pity it was dropped!"

3.14 "Unacceptable" measures on the NRS

Respondents were given the opportunity to write in details of any measure that they would find "completely unacceptable". The only agency objection was to "small sample" but the publishers' list of dislikes was more comprehensive, with the following items being mentioned more than once. Top of the list was the proposed "Attachment to a publication" question (see section 7.8 above), mentioned 5 times. Other measures "unacceptable" to publishers were "Day of week readership for magazines" (mentioned twice - see 7.3 above) and "Time spent reading" questions in any form (mentioned twice - see 7.7 above).

3.15 Titles that could be omitted

Respondents were also given the opportunity to write in any titles or groups of titles that they felt could be omitted from the NRS; again the response was very small. Among agencies, only three groups were mentioned more than once; "Specialist magazines" (sic) were mentioned by 6 agencies as candidates for omission and the other groups, mentioned by 2 agencies each, were "Quarterlies" and publications with "readerships less than 1%". This suggestion could be regarded as pleasingly paradoxical; precisely how the readership criterion for exclusion could be established without including the unfortunate magazines on the survey was sadly not explained.

Title groups mentioned more than once by publishers as candidates for omission were "Small circulation magazines" (3 times), "Bi-monthlies" (2) and "Special interest magazines" (2).

4. Attitudes to the NRS

Throughout the interviews, it was clear that the NRS is regarded as absolutely vital to the industry. It was felt to be essential that there is a common currency for the buying and selling of press advertising space and the NRS is recognised as providing that currency. The TGI is seen as a valuable provider of marketing data, but the NRS is perceived as an independent measure of readership to be used as a yardstick. The recent criticism of aspects of the NRS is simply a reflection of how important the NRS is considered to be. As someone put it "If we didn't care about it, then nobody would waste time criticising it!"

The NRS is therefore seen, first of all, as an essential common currency for the buying and selling of advertising space. That has been said many times before, but the answers to question 8.1 demonstrate the remarkable unity on that point, with 95% of respondents in agreement.

(Q. 8.1) NRS - an essential currency for buying and selling space

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies (56)		0	5	0	29	66
Publishers (48)		2	0	2	25	71
-----		--	--	--	--	--
Total (104)		1	3	1	27	68

That widespread agreement on the need for a common currency did not prevent an interesting philosophical debate as to whether the NRS should merely be a currency or whether it should attempt to measure the "Truth" in terms of the press coverage of a given target market. Those holding the "just a currency" view have argued that of course it is necessary to provide consistent measures of potential advertising exposure and that the measure should be able to distinguish between publications. However, those distinctions could be relative and for example it would not matter if all such estimates were in fact consistently say 50% higher than the "True" figure (if such a true figure could be established). Those seeking the "truth" would argue that, when setting budgets and attempting to achieve specific coverage and frequency targets, it matters very much indeed whether one has in fact reached 30% or 60% of the target market. Clearly, from the survey, it can be seen that although not at the 95% level supporting the need for a common currency, a large majority, 81% of agencies and 75% of publishers are in favour of the NRS at least attempting to be an absolute and not just a relative measure of readership.

(Q. 8.2) NRS - ideally an absolute as well as a relative measure

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies (56)		7	2	11	18	63
Publishers (48)		4	4	17	35	40
-----		--	--	--	--	--
Total (104)		6	3	13	26	52

At this point, the author must acknowledge and apologise for the fact that, in the final questionnaire, question 8.3 is apparently missing. The reason is that a question originally present in a draft questionnaire was subsequently dropped and the remaining questions were inadvertently not re-numbered. The results are not of course affected in any way and no respondent referred to the apparent omission. One respondent, (whose attention was drawn to the mistake after he had returned his completed questionnaire but who had clearly not noticed it at the time!), suggested that the omission should be explained in retrospect as a deliberate and thoughtful gesture designed to give a feeling of superiority to the respondents by providing them with an example of demonstrable incompetence. He then added that he doubted whether any such additional proof was really necessary, a remark from which he obviously derived great pleasure.

Another strength of the NRS is its perceived independence. Many agencies indicated during the interviews that the research carried out by publishers, however well conducted, could suffer from a credibility gap simply because it was felt that there must be some commercial axe to grind; whereas the same research carried out under the auspices of JICNARS suffered from no such disadvantage. As can be seen below, 97% of agencies agreed that the NRS provides an independent measure "which gives credibility unachievable by publishers carrying out their own research". It is interesting to note that 83% of publishers support that view.

(Q. 8.4) NRS - independence lends credibility

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	0	0	4	18	79
Publishers (48)	6	8	2	25	58
-----	---	---	---	---	---
Total (104)	3	4	3	21	69

On the other hand, the credibility of the NRS, in its role as the common industry currency, is vulnerable to any apparent anomalies in the results. It is irrelevant that any such apparent anomalies are completely explicable to NRS technicians; if they are not explicable and indeed explained to the users, then the inevitable result is pandemonium. The fact that 84% of agencies and 83% of publishers feel that "the credibility of the NRS has to some extent been damaged" by what are seen as "unexplained anomalies" must surely mean that JICNARS should take action to correct that impression, a point that is reinforced in the next few pages.

(Q. 8.5) NRS - credibility damaged by unexplained anomalies

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	2	7	7	52	32
Publishers (48)	2	8	6	52	31
-----	---	---	---	---	---
Total (104)	2	8	7	52	32

The interviews usually began with the respondents being asked if anybody had any strong views about the NRS, for or against, which they wanted to mention before they were led into any specific subjects. In a surprising number of cases, people working for agencies and publishers mentioned "readers-per-copy" showing the extent to which users tended to try to validate the NRS readership figures by comparing them with circulation data.

There were hair-raising stories of some magazines with readers-per-copy apparently less than 1.0! There was also repeated and vociferous incredulity that other magazines, often believed to be retained by the purchaser for reference, should apparently achieve readers-per-copy figures of 15 or more. Many of the horror stories were clearly apocryphal and tended to begin "Wasn't there that one where....?". The questionnaire therefore specifically referred to a respondent's personal experience of NRS readers-per-copy which in the respondent's opinion were perceived to be too low or too high. Even with that restriction, about half the respondents claimed to have personally experienced readers-per-copy "clearly too low". It should be emphasised that "clearly too low" is a subjective judgement, but if it is held by so many experienced media executives, it is perhaps a judgement that should not be ignored.

(Q. 8.6) Personally experienced NRS readers-per-copy clearly too low

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	4	11	34	32	20
Publishers	(48)	10	8	33	21	27
-----		--	--	--	--	--
Total	(104)	7	10	34	27	23

A similar percentage of agency respondents claimed to have personally experienced NRS readers-per-copy figures that are "clearly too high".

(Q. 8.7) Personally experienced NRS readers-per-copy clearly too high

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	2	14	29	32	23
Publishers	(48)	27	10	29	15	19
-----		--	--	--	--	--
Total	(104)	13	13	29	24	21

Interestingly, 36% of publishers agreed although, as might be expected, a similarly high proportion disagreed. During the interviews, more than one publisher admitted that, although their own research into their own magazines showed that the NRS readers-per-copy estimates were in some case wildly optimistic, there was obviously little point in drawing attention to a situation which could be regarded as commercially advantageous. However, other publishers recognised that certain readers-per-copy figures seemed to be incredibly high and were

concerned in case agencies then downweighted them but more drastically than was strictly necessary. Those holding that view were therefore in favour of addressing the whole issue of readers-per-copy to improve the credibility of the NRS survey generally in order that readership adjustment might become unnecessary.

The credibility of the NRS is also affected by apparently "inexplicable" fluctuations in readership between survey periods.

(Q. 8.8) Experienced apparently inexplicable r'ship variations

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	2	5	14	39	39
Publishers	(48)	6	10	27	25	31
-----		--	--	--	--	--
Total	(104)	4	8	20	33	36

Again, it must be emphasised that the survey results above reflect users' perceptions of the NRS, not an objective measure of the accuracy of the survey. As one publishing executive put it: "We lost thousands of NRS readers between one survey period and the next, although our circulation had gone up; JICNARS assured us that both figures were correct!" It should be noted that over three-quarters of agencies and over half the publishers claimed to have experienced readership fluctuations that they considered to be "inexplicable". If explanations exist, then they do not seem to have been understood.

5. Attitudes to JICNARS as an organisation

This section deals with attitudes to JICNARS, rather than attitudes to the NRS itself. During the interviews, the feeling was often expressed that JICNARS was "too remote" from the users and that there was room for substantial improvement in communications between JICNARS and the NRS users. Various points were raised but the general attitude to JICNARS might be summarised as "could do better".

From the interviews, it was clear that feelings of anger from the users were generated on the whole not from the fact that things might have gone wrong but that they felt that any "cock-up" tended to be followed by a "cover-up". Again, it must be emphasised that it does not matter whether in fact there ever has been a "cover-up"; this investigation is about user perceptions. However unfair it may be, there is a widespread feeling that JICNARS has in the past had a tendency to "go instinctively into defence mode" at the first sign of any anomaly and that is what has triggered any abuse rather than the anomaly itself. Several planners were quite specific about how any problems should be handled; their views can be summarised as follows:-

"If, when discovering the 4th quarter problem, they had called a general industry meeting, put all the technical guys on the platform, explained the problem, described exactly what they had already checked, admitted they were baffled and called for any ideas that might throw light on the matter, we would all have been very sympathetic. They probably wouldn't have got much response though they might have picked up the occasional good idea. They could then have described their proposed course of action, using modified previous data or whatever, and asked for approval, which they would undoubtedly have got. The industry would have gone off thinking they were straight guys making an honest effort in bewildering circumstances; there would be no more flak. That would have been much better than the rumours and counter-rumours and senior JICNARS guys denying there was anything wrong, which is what we seem to have had."

Maybe that view is taking rather too optimistic a view of the fair-mindedness and tolerance of the industry, but the approach might be thought to be well worth considering, because there has clearly been a communications problem in the past.

However, the situation is by no means universally bleak. In response to the suggestion made by several interviewees that JICNARS is not very "user-friendly", a statement with which 56% of agencies and 61% of publishers agreed, 26% of respondents disagreed, indicating a useful reasonably contented user base on which to build.

(Q. 9.1)		<u>JICNARS is not very "user-friendly"</u>				
		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	7	18	20	36	20
Publishers	(48)	2	25	13	38	23
-----		---	---	---	---	---
Total	(104)	5	21	16	37	21

Throughout the interviews, it was abundantly clear that users are looking to JICNARS to provide much more information and support as will become apparent from the next few tables. For example, 77% of agencies and 63% of publishers felt that JICNARS should provide a commentary to accompany the survey results.

(Q. 9.2) JICNARS - a commentary on survey results every six months

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	2	4	18	39	38
Publishers (48)	2	8	27	42	21
-----	--	--	--	--	--
Total (104)	2	6	22	40	30

"Comments should not be left", said one person, "to articles in the trade press written by journalists or agency people who have been primed by rival media owners. JICNARS should provide a commentary on all results, drawing attention to all apparent anomalies and stating clearly which are significant, which are likely to be due to sampling error and which ought to be the subject of further investigation".

Some interviewees went even further than that, saying that JICNARS should make an industry presentation of the results every six months and give the opportunity for the industry to question representatives of the NRS Technical Sub-Committee and the Research Contractor. However, as the figures below show, there was considerably less enthusiasm for that idea with under half the respondents being in favour. The views of many of the rest could no doubt be summed up by one interviewee who asked gloomily, "Who on earth would go to that?"

(Q. 9.3) JICNARS - an industry presentation every six months

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	5	16	36	27	16
Publishers (48)	2	15	35	33	15
-----	--	--	--	--	--
Total (104)	4	15	36	30	15

On the other hand there was tremendous enthusiasm for the idea that there should be a JICNARS spokesperson who would be available and able to answer general and technical questions from all users.

(Q. 9.4) JICNARS Spokesperson for technical & general questions

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	2	2	7	43	46
Publishers (48)	0	0	2	40	58
-----	--	--	--	--	--
Total (104)	1	1	5	41	52

The idea of a JICNARS "Technical Spokesperson" had the highest level of support of any proposal in the questionnaire with 93% of all respondents being in favour. Publishers were particularly keen on the idea (98%) and it is interesting to note that it is the first suggestion in the questionnaire which was not opposed by a single publisher.

It was also suggested that there should be a regular newsletter from JICNARS to explain technical issues in relatively simple terms with articles explaining the principles of sampling error or the pros and cons of fusion. There was almost as much support for this suggestion as there was for the spokesperson with again no publishers being against the idea and 91% of all respondents being in favour.

(Q. 9.5) JICNARS - a regular newsletter to explain technical issues

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	2	0	11	34	54
Publishers (48)	0	0	4	46	50
-----	--	--	--	--	--
Total (104)	1	0	8	39	52

When a new publication is launched, and before it can be included on the NRS, the readership is often "simulated" by one or more computer bureaux on to the existing NRS database, so that schedule reach and frequency analyses can be carried out which include the new publication. The "rules" for such simulation, usually based to a large extent on the predicted circulation of the new publication, are normally provided by the parent publishing house.

The need to have a common media currency is to some extent reflected in the support, particularly among agencies, for the idea that JICNARS should give its "imprimatur" to any proposed simulation of the readership of an about-to-be-launched but so far unpublished newspaper or magazine. However, it was interesting to discover during the interviews that several agency planners reacted with horror to the suggestion, saying that agencies were capable of making up their own minds as to the validity or not of a proposed simulation and that it was not the function of JICNARS to give an opinion with no more information to go on than the rest of the industry.

"We are," said one, "grown-up and we really do not need a nanny in the form of JICNARS."

It was a firmly-held point of view, but as can be seen from the answers to question 9.6 below, it is not one that is shared by the majority of agencies, 86% of whom are in favour of a JICNARS "seal of approval" for proposed simulations.

(Q. 9.6) JICNARS seal of approval to any readership simulation

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	(n)	%	%	%	%	%
Agencies	(56)	4	0	11	41	45
Publishers	(48)	2	6	33	38	21
-----		---	---	---	---	---
Total	(104)	3	3	21	39	34

Finally, the expressed need for JICNARS to play a much greater role in the industry is illustrated by the fact that 71% of agencies and 73% of publishers are in favour of JICNARS providing regular education and training courses. Clearly, there is a wide body of support for the view that JICNARS should be a great deal more than just a provider of national readership research.

(Q. 9.7) JICNARS regular educational and training courses

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	(n)	%	%	%	%	%
Agencies	(56)	2	9	18	39	32
Publishers	(48)	0	4	23	35	38
-----		---	---	---	---	---
Total	(104)	1	7	20	38	35

6. JICNARS structure and funding

The final section of the questionnaire dealt with a subject that was not covered in the brief, but was raised by so many agencies and publishers during the interviews that it had to be included in the survey; the matter of JICNARS structure and funding. Potentially, one would have thought that this subject would be highly controversial and would lead to views being expressed in the most heated way. It was however a great relief to discover the calm, objective and reasonable way in which the people interviewed, in agencies and publishers, dealt with this potentially difficult subject. It seemed to be generally agreed that JICNARS progress on technical matters does not seem to be as fast as most people would like. During the interviews, three points were often made, each of which as a possible contributory factor to the perceived fact that some potential improvements to the NRS had not been implemented in the past.

The first of these suggestions was that publishers tend to vote on technical NRS matters, not on objective grounds, but with a view to defending their own company's vested interests. It should be emphasised that this opinion was not put forward, even by the most forceful agency, in any derogatory way nor indeed implying that such behaviour was in any way improper, immoral or unfair. On the contrary, it was seen as an inevitable consequence of having publishers' representatives on technical committees. It was pointed out that it could be argued that it was possibly even the duty of an employee of a publisher to represent his or her company's best interests when considering a particular technical proposal. It was felt to be unrealistic to expect a publisher's representative to vote for an improvement to the readership question which in his or her opinion would place his or her employer's newspaper or magazine at a commercial disadvantage.

"In their position", said one agency man reasonably, "I would probably do the same. But it still inhibits progress."

Agency people, on the contrary, are seen as not being subject to any such pressures, and are in an ideal position to seek for objective measurement of press advertising exposure and indeed would be representing the best interests of their clients by doing so. However, it was generally agreed that unfortunately, agency executives do not gain much personal or company advantage from being active in JICNARS matters and there is therefore little incentive to do so. As one agency executive put it:

"Being on an industry committee does not bring new clients flocking to your agency door, and at a personal level one would do better being a whizz-kid time-buyer in the hope one would be poached by a buying-shop!" There seemed general agreement that agencies do not put in enough time nor money on JICNARS matters, but as they receive little credit or financial reward for doing so, that situation should not be regarded as surprising.

These two factors were widely seen as the reasons why many apparently good suggestions for technical improvement were not in fact implemented by JICNARS. Although the behaviour of publishers and agencies was regarded as understandable, both groups were thought to be retarding progress.

"The newspapers killed MPX", said one person, "and the agencies were too apathetic to stop it". That view was widely shared.

A third suggested reason given for the slow implementation of potential NRS improvements was the understandable tendency of technicians to defend the "status quo" in any situation. It was suggested that the comparative scarcity of expertise in the highly specialised field of readership research tends to mean that many of the industry's experts have been associated with the NRS for a very long time. During that time, they have been associated with the development and implementation of the existing methodology and it was argued that there is therefore a very natural and human tendency to defend that methodology with the dedication of a she-bear protecting her young, resisting change by impressive technical arguments that may not always be objectively based. This hypothesis of technical inertia, which was again put with sympathy and understanding, may well have some validity. However, it became clear from subsequent interviews that to be able to comment on the suggestion with any degree of authority it would be necessary to have been present on a reasonably consistent basis at JICNARS meetings where technical items were discussed and that is a position few respondents would be in. For that reason, it would therefore have been pointless to include the matter on the questionnaire and it was therefore omitted. So the questionnaire was confined to the first two hypotheses, starting with the suggestion that publishers have been known to vote on NRS technical issues based on their own interests, rather than objectively.

At this stage, it is pertinent to mention a general point which may well have some bearing on the whole investigation - a phenomenon referred to by the author as the "Rice-Davies Syndrome". It may be recalled that Miss Mandy Rice-Davies was a friendly, even affectionate, girl who was deeply embroiled in the Profumo scandal. At the trial of Stephen Ward on June 29th 1963, Learned Counsel put to Miss Rice-Davies, in the witness-box, the following question:-

"Are you aware?", he said, "that Lord Astor has denied all your allegations?". To which her reply was, as the Oxford Dictionary of Quotations will now confirm, "He would, wouldn't he?". Collapse, as they say, of Learned Counsel! And the world accepted the remorseless logic of her answer.

The point of all this is that one might expect agencies or publishers to give particular answers to certain questions in this questionnaire, simply by virtue of their position; "They would say that, wouldn't they?" - the Rice-Davies syndrome. What is interesting therefore is the number of respondents who do not reply as one might have expected them to, and no doubt readers will wish to take that point into account when considering the results of this study.

With that in mind, consider the results of question 10.1 below, which asked respondents to comment on the proposition that "Publishers have been known to vote on NRS technical issues based on their own interests rather than objectively".

(Q. 10.1) Self-interested vote on NRS technical issues

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	0	2	18	36	45
Publishers	(48)	4	6	38	27	25
-----		--	--	--	--	--
Total	(104)	2	4	27	32	36

Perhaps it is hardly surprising that 81% of agencies tend to agree with the statement. What is much more surprising and indeed very refreshing in its honesty, is the agreement of over half the publishers and the fact that only 10% of them disagree. The answers to this question do not of course solve the problem but at least there is general acknowledgement that the problem exists.

The next statement on which respondents were asked to give their views dealt with the second hypothesis. The results are as follows:-

(Q. 10.2) Agencies do not devote enough time to technical issues

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	7	9	13	50	21
Publishers	(48)	0	0	29	35	35
-----		--	--	--	--	--
Total	(104)	4	5	20	43	28

Again bearing in mind the "Rice-Davies syndrome", it is encouraging that over 70% of agencies as well as publishers agree that agencies do not devote nearly enough time nor money to JICNARS technical issues. As before, that acknowledgement does not solve the problem but it goes a long way towards identifying it.

Having recognised two inherent flaws in the current structure of JICNARS, the question then arises as to how to remove them, which leads to the question of finance. The answers to question 10.3 were as follows:-

(Q. 10.3) JICNARS should be financed mostly by publishers

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	13	14	4	38	32
Publishers	(48)	21	33	23	19	4
-----		--	--	--	--	--
Total	(104)	16	23	13	29	19

The suggestion that JICNARS should be financed mostly by publishers found great favour, as might be expected, with the agencies. But one should not lose sight of the 27% of the agencies who disagreed, many of them in the knowledge that if the publishers pay for the research then they could hardly be expected to do so without a substantial say in how the research is carried out. Similarly the 23% of

the publishers apparently happy to shoulder the financial burden are likely to include the very intelligent but perhaps rather cynical publisher who admitted that "Of course we will put up with paying for the research if it means that we control it!"

The suggestion by some publishers (presumably contributors), that JICNARS should publish readership data only for those publishers willing to pay, did not find much favour with agencies, 87% of whom clearly see the value of the NRS as providing a comprehensive survey of press media for planning purposes, regardless of any financial implications.

(Q. 10.4) Readership data only for those publishers willing to pay

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	57	20	4	14	5
Publishers	(48)	21	21	13	27	19
-----		--	--	--	--	--
Total	(104)	40	20	8	20	12

During the interviews, the suggestion was made repeatedly that, to remove the possibility of any parties exerting economic pressure to influence events, JICNARS should be financed by means of a levy applied to all press advertising expenditure and collected by the agencies at the time of billing their clients. JICNARS could then be governed by a Board of Trustees consisting of representatives of the great and good from all sides of the industry and the day-to-day activities could be run by such salaried executives as might be necessary. These might include a director, technical director, administrator and, one would imagine, the much-desired "spokesperson" discussed earlier; all these functions might be concentrated in one or two hard-worked human beings but they could be assisted by a technical committee of recognised experts appointed from all sides of the industry who could guide the research contractor without the power or responsibility of financial involvement.

This proposal has been made in the past but it does not seem to have progressed very far in this country, although such an arrangement is believed to work reasonably well in other countries. However, as can be seen from the figures below, the idea is clearly far from dead. The fact that it is supported by over half the agencies, together with the absence of opposition from two-thirds of the publishers and the undeniable advantage that it removes the possibility of a financially-backed veto by any party, might suggest that the proposal is well worth a re-appraisal.

(Q. 10.5) JICNARS should be financed by a levy on all press billing

		Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
		%	%	%	%	%
Agencies	(56)	16	20	7	27	30
Publishers	(48)	17	15	33	25	10
-----		--	--	--	--	--
Total	(104)	16	17	19	26	21

An alternative proposal, suggested during one of the interviews, was that rather than the publishers paying a large proportion of the research costs directly to JICNARS, the publishers' commission to agencies could be increased by a given percentage and the agencies would then pass that on to JICNARS instead. Although the publishers would in effect still be paying for the research, the argument went that they would benefit from not being seen directly to do so and any implied financial threat to encourage the adoption or veto of any proposed course of technical action would be considerably more difficult to enforce. Though seen in some quarters as an ingenious idea, the results of question 10.6 below show that it clearly has a long way to go before it gains general support.

(Q. 10.6) JICNARS financed by an increase in agency commissions

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	36	21	18	18	7
Publishers (48)	48	25	23	4	0
-----	--	--	--	--	--
Total (104)	41	23	20	12	4

Finally, in response to the general agreement that, unlike publishers, agencies currently have little incentive to devote enough time or money to JICNARS technical issues, a logical response was to remunerate agencies for the time spent by agency personnel on JICNARS matters. It was further argued that, as a result, appointment to a JICNARS committee might become a matter of personal and agency pride, which would encourage all agency media people to increase their expertise in media research matters. Whatever the logic of this approach, it can again be seen from the results of the survey that it is not one received with universal and rapturous acclaim.

(Q. 10.7) Agencies remunerated for time spent on JICNARS matters

	Strongly disagree	Mildly disagree	Don't mind	Mildly agree	Strongly agree
	%	%	%	%	%
Agencies (56)	29	14	21	16	20
Publishers (48)	42	10	40	8	0
-----	--	--	--	--	--
Total (104)	35	13	30	13	11

7. Conclusion

This document can only hope to draw attention to the highlights of a very time-consuming and comprehensive study. It is hoped that among all the detail, the main lessons have not been lost:- the need that the industry has for the NRS, the fact that it represents an essential currency for the buying and selling of press advertising space and the universal wish that it should continue.

As was stated earlier, the criticism to which the NRS has been exposed recently is a reflection of its importance to the industry; such criticism stems from a genuine desire to preserve and improve a precious commodity. Any currency must be consistent, reliable and universally accepted; when consistency or reliability are called into question then there will be cries of alarm on all sides, particularly when the currency is as important as the one that is the subject of this study. However, the cries of alarm, which admittedly have sounded fairly urgent in recent months, should not be interpreted as a general desire to destroy or replace the NRS but rather as an urgent call to correct and improve it. The message from this study is clear; the industry needs a survey to permit the planning of advertising schedules in all sections of the national press, based on an accurate and consistent measure of potential advertising exposure.

To the author's knowledge, there has been no previous attempt on this scale to find out what the users of the NRS actually need. What has emerged of course is not necessarily a statement of fact but of perception. This project does not give us a picture of what the NRS does; it is a picture of what the users think it does and what they would like it to do, which is not necessarily the same thing.

The report represents the authentic voice of the NRS users. It remains only to hope that their message is heard.

Copyright: N. H. Shepherd-Smith.

12th November 1990.

5. Additional data

Please will you indicate, using the scale 0 - 4, whether you need any of the following additional data on the NRS?

Scale:

0 = Strongly against, 1 = Mildly against, 2 = Don't mind,
3 = Mildly in favour, 4 = Strongly in favour

- 5.1. Readership of newspaper sections? []
- 5.2. Readership of sections of magazines? []
- 5.3. Saturday/weekday readership for newspapers? []
- 5.4. Saturday/weekday readership for magazines? []
- 5.5. Readership by day of week for newspapers? []
- 5.6. Readership by day of week for magazines? []

Quality of reading

During the interviews, there was a great deal of interest expressed in "qualitative" data in the sense of refining average issue readership estimates in ways likely to reflect the level of respondents' potential exposure to advertising. In many cases, discussion centred on the proposal by Tom Corlett for the I.P.A. -in January 1989 which provided a valuable summary of several possible options. Corlett referred to the classifications of responses used in the "Survey of Magazine Audiences", Spring 1987, by Mediamark Research Inc. USA, and these classifications may help to give an indication of the level of detail that might be envisaged. With this background, please will you indicate below, using the scale 0 - 4, whether you need any of the following additional data provided on the NRS?

Place of reading (e.g. as in the M.R.I. questions below)

(At doctor's or dentists, at beauty parlour, hairdresser's or barber's, at library, club or school, in business reception room, while travelling to/from work, on an aeroplane, during other travelling, at work, at a shop or news-stand, in someone else's home, in your own home, somewhere else.)

- 5.7. Do you need place of reading data on the NRS? []

Please add any comments you would like to make:-

Please will you indicate, using the scale 0 - 4, whether you need any of the following additional data on the NRS?

Scale:

0 = Strongly against, 1 = Mildly against, 2 = Don't mind, 3 = Mildly in favour, 4 = Strongly in favour

How copy was obtained (e.g. as in the M.R.I. classifications)

- From a friend, neighbour or relative not living in this household. At a hairdresser's, doctor, dentist, library, school, office, etc. On an aeroplane, train, bus etc. Received on subscription in my name. On subscription in the name of another member of my household. On joint subscription in the name of me and another. I myself purchased it at a newsagent's or shop. Another member of my family bought it at a newsagent's or shop.

5.8. Do you need "how copy obtained" data on the NRS? []

Time spent reading

A great deal of discussion took place on the subject of time spent reading. Many people felt that questions relating to the proportion of an issue read would be valuable, either in addition to or instead of questions attempting to measure the approximate time spent reading an issue in minutes. For this reason, both options are included below:-

Do you need, on the NRS, data relating to

5.9. Time spent reading in minutes? []

5.10. Proportion of issue (% of pages) read? []

Attachment to a publication

Corlett suggested a question along the lines of "Suppose (title) stopped publishing. How disappointed would you be? (a) Very, (b) Moderately, (c) Only a little (d) Hardly care"

5.11. Do you need a question like that on the NRS? []

Please add any comments you would like to make:-

Issue readership accumulation over time

The current NRS readership measure gives an estimate of the total readership of an average issue of a publication but does not give any indication as to how such readership is built up over time. Where there are several readers per copy, each reader will take time to read the issue and then pass it on; thus the final readership may take weeks or even months to accumulate. This phenomenon may be thought to be sufficiently important for JICNARS to research, probably in a study (e.g. a panel) separate from the main NRS. Please use the scale (0 - 4) to indicate your reaction.

Scale:

0 = Strongly against, 1 = Mildly against, 2 = Don't mind,
3 = Mildly in favour, 4 = Strongly in favour

5.12. Do you need JICNARS to provide data on issue readership accumulation over time? []

Please add any comments you would like to make:-

5.13. Please use the scale (0 - 4) to indicate whether you need any additional titles or groups of titles on the NRS. []

If so, then please write the names below:-

5.14. Please use the scale (0 - 4) to indicate whether you need any other information to be collected as part of the NRS? []

If so, please give details below

If you have responded positively (i.e. entered 3 or 4) to any of the questions 5.1 to 5.14 above, please will you now indicate the importance of each request by ranking each item. For example, if you entered "3" for items 5.7 to 5.10 above but you feel that "5.9. Time spent reading" is most important, then you should enter "1" by item 9 (Time spent reading) below and so on.

For each of the following items for which you entered 3 or 4, please now rank them in order of importance to you

Items to which you responded positively above	Rank (1 to ...?)
1. Readership of newspaper sections	[]
2. Readership of sections of magazines	[]
3. Saturday/weekday readership for newspapers	[]
4. Saturday/weekday readership for magazines	[]
5. Readership by day of week for newspapers	[]
6. Readership by day of week for magazines	[]
7. Place of reading data	[]
8. How copy was obtained	[]
9. Time spent reading in minutes	[]
10. Proportion of issue read	[]
11. Attachment to a publication	[]
12. Readership accumulation over time	[]
13. Additional titles	[]
14. Other data	[]

"Qualitative data"

If you responded positively to any of the items 7 - 12 above, please indicate whether you would prefer such data

5.15. as part of the main survey, []
 or derived from a separate study. []

5.16. Please indicate whether you would prefer such data
 continuously, []
 every other year, []
 or on an ad-hoc basis. []

5.17. If there is any measure that you would find completely unacceptable on the NRS, then please give details:-

5.18. If there are any titles or groups of titles that you feel could be omitted from the NRS then please give details:-

8. Attitudes to the NRS

The interviews revealed a difference between those who considered the NRS to be merely a "currency" to be used in the buying and selling of press advertising space, and those who thought that it should attempt to measure the "truth" in terms of press coverage of a given target audience. Some, holding the first view, have argued that, to establish a currency, it is necessary to provide consistent measures of potential advertising exposure, but the readership levels for titles could be relative and for example it would not matter if all published readership levels were in fact consistently 100% higher than the "true" figure, (if it could be established). Those seeking the "truth" would argue that, when setting budgets and attempting to achieve specific coverage and frequency targets, it matters very much whether one has in fact achieved 30% or 60% of the target market. In the light of these thoughts, please will you indicate your reaction to the following statements, writing a number in each box using this scale:

0 = Strongly disagree, 1 = Mildly disagree, 2 = Don't mind (or not applicable), 3 = Mildly agree, 4 = Strongly agree

- 8.1. The NRS provides an essential currency for the buying and selling of press advertising space
- 8.2. The NRS should also attempt to provide an absolute, as well as a relative measure of readership
- 8.4. The NRS provides an independent measure which gives credibility unachievable by publishers carrying out their own research.
- 8.5. The credibility of the NRS has to some extent been damaged by unexplained anomalies
- 8.6. We have personally experienced NRS readers-per-copy figures which are clearly too low
- 8.7. We have personally experienced NRS readers-per-copy figures which are clearly too high
- 8.8. We have personally experienced NRS readership figures fluctuating, apparently inexplicably, between survey periods

Please add any comments you would like to make:-

9. Attitudes to JICNARS as an organisation

During the interviews there was some criticism expressed about JICNARS in that it is "too remote" from its users. In order to enable us to ascertain how widespread this feeling is, please will you indicate your reaction to the following statements, writing a number in each box using this scale:

0 = Strongly disagree, 1 = Mildly disagree, 2 = Don't mind (or not applicable), 3 = Mildly agree, 4 = Strongly agree

- 9.1. JICNARS is not very "user-friendly"
- 9.2. JICNARS should provide a commentary to accompany the survey results every six months
- 9.3. JICNARS should make an industry presentation of the survey results every six months
- 9.4. JICNARS should provide a "Spokesperson" to answer technical and general questions from all users
- 9.5. JICNARS should provide a regular newsletter to explain technical issues in simple terms
- 9.6. JICNARS should give its prior "seal of approval" to any readership simulation of unpublished titles
- 9.7. JICNARS should provide regular educational and training courses

Please add any comments you would like to make:-

10. Structure and funding

Throughout the interviews, the view was expressed, time and again, that it was possible that some potential improvements to the NRS had not been implemented in the past due to (i) the understandable tendency on the part of publishers to defend their own vested interests and (ii) the apathy of advertising agencies, who did not devote nearly enough time or money to JICNARS technical issues. It was pointed out that although, in theory, agencies should be concerned to obtain for their clients an objective measure of readership, in practice they receive little credit or financial reward for doing so. It was felt that the situation is not improved by the publishers being thought to "pay" for most of the NRS and thus being in an even stronger position to influence decisions. In the light of these expressed views, which may well be based on opinion rather than substance, please will you indicate your reaction to the following statements, writing a number in each box using this scale:

0 = Strongly disagree, 1 = Mildly disagree, 2 = Don't mind (or not applicable), 3 = Mildly agree, 4 = Strongly agree

- 10.1. Publishers have been known to vote on NRS technical issues based on their own interests rather than objectively
- 10.2. Agencies do not devote nearly enough time nor money to JICNARS technical issues.
- 10.3. JICNARS should be financed mostly by publishers.
- 10.4. JICNARS should publish readership data only for those publishers willing to pay.
- 10.5. To remove the possibility of any parties exerting economic pressure, JICNARS should be financed by means of a levy, applied by the agencies to all press billing to the advertisers.
- 10.6. As an alternative to 10.5, JICNARS should be financed by an increase in the commission paid by the publishers to agencies.
- 10.7. To encourage agencies to play a more active role in JICNARS matters, agencies should be remunerated by JICNARS for the time spent by agency personnel

Please add any comments you would like to make:-
