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THE STRANGE CASE OF
QUARTER FOUR 1988
- A CAUTIONARY TALE

1. In October 1988, 9 new titles were added to the NRS newspaper section.
2. Large drops were experienced in the readership of quality daily and quality Sunday newspapers.
3. It was clear that the results for Q4 1988 were very different from previous data.
4. Some individual titles were very badly down on previous levels.
5. Newspaper data was not published for the period while results were analysed and experiments implemented.
6. Investigations are listed.
7. Results returned to normal in 1989, and publication of the data resumed.
8. A new method was devised for introducing new titles to the survey in future.
9. The repercussions of this problem are still being felt in the UK, in attitudes to the survey, and the paper reports changes made to the organisation of JICNARS, which have some roots in this episode. These matters are still developing, though.
10. In essence, this is a cautionary tale which highlights how delicate some areas of the survey may be, although thought to be quite robust up to that time.

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As an aftermath of Rupert Murdoch's attack on the power of the print unions by his move to Wapping there was a sudden increase in launches from national newspapers. This new competitive "high" caused JICNARS to add nine new titles to the newspaper cards on the survey, in one month.

Aside from two new newspapers (UK - The Post and Scotland - Scotland on Sunday) many newspapers increased the appeal of their product by launching new magazines to be issued with the standard newspapers. Titles with new magazines were:-

Daily Mail
Daily Telegraph
Independent
Sunday Mirror
Sunday Mail
Sunday Post
Sunday Telegraph

The National Readership Survey (NRS) in the UK collects data continuously across the year and when we looked at October, the first month after the addition of these titles, we were shocked at the drops in readership measured for the quality newspaper titles.

The fall in readership continued during November and Quarter Four (Q4) 1988 showed the following result measured as readers per copy on average:-

Publication (Newspapers)	Jan-Sept 1988	Oct-Dec 1988	Diff.
All National Dailies	2.7	2.6	- 4%
All National Sundays	2.8	2.7	- 4%
Quality Dailies	2.7	2.3	- 15%
Quality Sundays	2.9	2.6	- 10%

The fall in readers per copy for quality titles in particular was puzzling as not all the new titles added were quality publications. This rang alarm bells louder, that it might not just be an affect of increased competition in a specific marketplace.

We, of course, asked ourselves whether this could be an unusual sampling variation that we were particularly alarmed by only because we had added so many titles to the survey in one go. So, we looked at other quarters of the year to gain a measure of how different the last quarter of 1988 was. The table below shows that it was very different.

Variations in Group Readers Per Copy by Quarter

	1987	1988			
	Q4	Q1	Q2	Q3	Q4
Total Titles Analysed	19	19	19	19	19
No. where RPC was:					
10% above average	3	1	-	2	-
5-10% " "	2	1	3	4	-
About average	13	16	14	11	8
5-10% below average	1	-	2	2	6
10% below average	-	1	-	-	5

It was clear that Q4 1988 was very different as in most quarters almost all titles were within +/- 10% of their average value but in the problem quarter, far fewer were on average and many more were below.

The situation that worried us the most was that individually, some quality newspapers were very badly down. The next table shows the situation for quality dailies, which is again in terms of readers per copy as the measure places the survey result, subject to sampling variation and possibly unexpected bias, in terms of the more concrete measure of circulation.

Quality Dailies Newspapers	<u>Readers Per Copy</u>		Diff.
	Previous 12 months average	Q4. 1988	
A	2.4	2.1	- 12%
B	2.7	2.1	- 22%
C	3.0	2.0	- 33%
D	2.9	2.4	- 17%
E	3.7	3.9	+ 5%

These were very serious differences in the case of publications B & C which were well below the average drop and for this reason we never identified them by their proper titles.

One individual Sunday newspaper title suffered a similarly violent reduction:-

Quality Sunday Newspapers	<u>Readers Per Copy</u>		Diff.
	Previous 12 months Average	Q4. 1988	
L	3.2	2.9	- 9%
M	2.9	2.3	- 20%
N	2.9	2.7	- 7%

On the face of it, national daily and Sunday newspapers which had classically been very little affected by quite large changes to the survey and whose readership figures had been regarded as very robust, appeared to have been very severely changed by the addition of new titles in their publication category.

As some of these changes could have had very severe commercial repercussions for individual titles we decided to suspend the publication of the NRS findings for national newspapers for that quarter while we investigated the problem. Magazine titles showed no disturbance, so were published normally over the period.

In order to provide usable computer tapes for analysis and to cover newspapers in the reports issued, we simulated newspaper data to reflect their average readership performance for the January - September 1988 period and projected this on the last quarter of the year.

Our first investigation action was to change our prompt cards on a split run basis for 1989. This was to test whether the changes to cards had caused the readership drop. We returned the prompt cards for half the sample to the situation they were in before all the new supplements were launched. This was achieved by putting all the new supplements onto their own card, away from their parent newspapers.

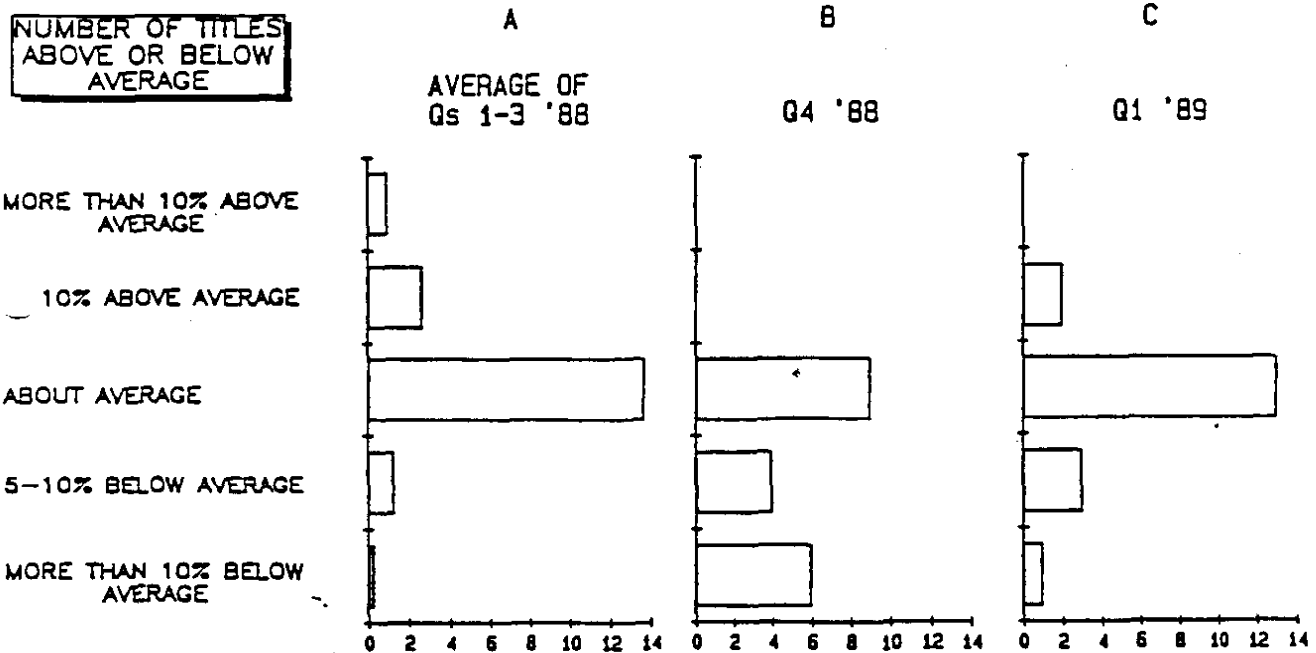
Previous experimental work had shown that supplements away from their parent paper and thus not associated with them, tend to record very low readership levels. This was confirmed by the new experiment as the colour supplements, thus separated, showed very depressed readership levels.

In contrast the readership levels of the parent newspapers were very similar for both arrangements and perversely the quality newspapers in 1989 tended to score higher readerships when in the Q4. 1988 arrangement, than when restored to their pre-Q4.levels.

Basically, the experiment confirmed previous findings that readership was not generally affected by prompt card arrangement changes. Previous experience had suggested that daily and Sunday newspapers in particular were little affected by quite large survey changes. The NRS change made from masthead, individual titles, prompt cards to the present arrangements using group title prompts, which are in typescript, had not affected newspaper data to any great extent.

We could thus conclude that it was not the card arrangements that caused the problem or perhaps, more accurately, not once all the new titles were familiar to interviewers and respondents.

The abnormality of the newspaper results in quarter four 1988 can also be seen on the chart below which illustrates that the results returned to normal in the first quarter of 1989.



The similarities of distributions A & C can be contrasted with the major difference in the shape of distribution B.

We also subjected the Q4. 1988 newspaper data to other very close analysis and scrutiny. What did these investigations yield?

Only one technical abnormality was found but not explained. We found during Q4 1988 that late rotation newspaper cards were selected 10% less frequently than usual when all the newspapers read in the last year were on that card.

By contrast, we found no evidence that changes to the questionnaire or prompt cards had caused problems. This conclusion was based on both the split run experiment referred to and on previous experience with the survey.

We picked over the sample design aspects and found no faults.

Some suspected that the influx of new titles might have made the questionnaire too long. This did not seem to be the case as the data returned to normal in 1989 when, if anything, the questionnaire was, in total, a little larger. We also found that the newspaper results were similar whether asked about early or late in the interview, depending on the rotation order used. What our investigations could not rule out was that the effect was temporary and due to a sudden increase in questionnaire length.

We found no abnormalities in field work or quality control measures employed on the survey during the period.

We also found nothing strange about the sampling points selected during the period, no mistakes in coding or data processing of the suspect data.

With no findings that could be corrected in future to stop the problem happening again, we decided that we must be even more cautious about introducing changes to the survey and particularly to the introduction of new titles.

In fact a new procedure was introduced for coping with new titles, that would prevent them from disrupting the standard prompt cards and this is being described in detail by Erhard Meier in a separate symposium paper.

The repercussions, in my opinion, however, were much more far reaching than this.

Readers of this paper, from what I hear, will be very familiar with the concept that media research is a closely scrutinised activity which even in good times draws more than its fair share of criticism. Most national readership surveys collect more critics than even Pearce & Waddle who missed the crucial penalties that knocked England out of the last football World Cup play-off!

These critics were able to rally round the non-publication of results for 1988 so that 20 years of respected JICNARS work was forgotten as every shortcoming became magnified.

This was not an altogether bad thing as JICNARS had to completely reassess itself as it changed status, very rapidly from being the hero of the advertising research scene, to becoming the villain.

It was faced with the need for rapid reform which is still continuing and as I write this paper its future is still uncertain - I hope that by the time it is presented in Hong Kong I can report that these difficulties have been overcome.

The possibilities being considered are:-

- 1) Disband JICNARS and fund a private survey or surveys.
- 2) Split the survey into two - one funded by newspapers and one by magazines.
- 3) Cut the media list severely to measure only high readership titles.
- 4) Find new ways of funding the NRS, where agencies must guarantee a proportion of funds up front.

In order to accommodate criticism and meet stated user needs JICNARS has already made the following changes:-

- 1) It has disbanded its technical sub-committee and its associated working parties. It seems that the industry no longer wanted the degree of protection on technical matters offered by this group and saw the multi-tiered committee structure as an inhibitor to change.
- 2) Reformed the measures for 1991 by introducing:-
 - i) Topic interest measures as a surrogate for direct measurement of newspaper sections.
 - ii) Modified and simplified its measurements of other media and the amount of special interest activities reported on (eg. motoring, smoking and ownership of consumer durables).
 - iii) Introduced a new measure of readership for Saturday editions of newspapers on a split sample test.
 - iv) Is likely to introduce a measure of provenance for titles read also as a split copy test.

Early in 1991 it must get industry acceptance of a new structure, political and funding base for the survey and draw up a specification for 1992 that can gain the support of all three of its constituent bodies.

Readership surveys are quite sensitive beasts and our experience shows that even those sectors we may regard as being most robust and least sensitive to change can be mysteriously and unexpectedly disrupted. Introduce change with caution, otherwise you may introduce other changes beyond your wildest expectation!

Anyone wishing to learn more about the Q.4. problem and the search for causes could apply to either myself or Janet Mayhew, secretary of JICNARS for a copy of our full report.