

CHANGES IN THE GREAT BRITAIN NRS

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On December 31st 1991, a new company was born - National Readership Surveys Limited - a company limited by guarantee. It is the publisher of the NRS (National Readership Survey) and fulfils the functions previously carried out by JICNARS.

From the 1st January 1992 it was responsible for the new contract, which runs to December 1996 with Research Services Limited as the research agency. They had previously carried out the survey work for JICNARS.

The new contract is for a very different survey and in the United Kingdom we are still examining some of the repercussions of the changes we made to the survey.

The new methodology was piloted, but the pilot incorporated changes to sampling frame and methodology, changes to the data collection method and changes to the readership questions themselves.

There is little doubt that in the past, each of these changes would have been piloted individually and the affects of the change carefully assessed before going ahead with them, but the circumstances prior to the new contract were so unusual that it is necessary to fill in some of that background in order for the reader to appreciate why so many changes were made on judgement alone.

It has to be recognised that when research is controlled by all sides of the industry and in the UK for JICNARS that meant agencies, advertisers, magazines and newspapers that the requirements of one side of the industry will not always coincide with the desires of others. A certain amount of conflict is to be expected.

For JICNARS, as for many other press surveys, the measurement of quality of reading and in particular an attempt by the magazine side of the industry, to measure it along the lines of MPX, had produced a rift.

This rift and the lack of progress in moving a quality of reading measure forward caused the various aggrieved parties to examine many other aspects of JICNARS and to find it lacking.

For over twenty years JICNARS had enjoyed a strong relationship with its users - it was the "knight in shining armour" of media research studies. It was fair and trusted - JICNARS had a similar reputation to the Good Housekeeping seal of approval. Its data was open to all, it had nothing up its sleeve - it was legal, decent and honest.

But the lack of progress and stonewalling on quality of reading began to sour some of these beliefs and relationships and in particular made some advertising agency critics very vociferous and most of this criticism was levelled at the technical sub-committee where much of the debate became bogged down and blocked.

In the last quarter of 1988 a sudden wave of new launches, resulting from restrictive practices being overcome within the print unions, caused eleven titles to be added to the newspaper prompt cards in one month. This proved to be the straw that broke the camel's back.

An inexplicable and still largely unexplained drop occurred in that quarter to the readership figures for national newspapers and the technical sub-committee had to take the decision to suppress newspaper data for those three months.

This caused an explosion of criticism of both the technical sub-committee, the survey and JICNARS in general. Agencies were angered by and critical of the fact that they were not allowed to see the data for themselves, as they could not be "trusted" with it. Newspaper publishers were critical that they were paying for data that could not be used, particularly for the new titles they had launched.

The debate widened into a questioning of the survey's suitability for the nineties as a whole. The criticisms were:

1. the whole structure of committees is out of touch with the realities of commercial life today (then Thatcherite Britain);
2. JICNARS creates a "talking shop" where nothing ever changes or develops;
3. JICNARS is a faceless bureaucracy, out of touch with its users needs;
4. the fundamental requirements of magazines and newspapers are different and cannot be satisfactorily measured on the same survey; and
5. the operation is perceived monopolistic and gives a slow response out of touch with the speed of development of modern media decision taking.

This criticism was focused by the announcement that two of the largest newspaper groups in the UK - Associated Newspapers and News International - had come together to pilot an alternative, newspaper only survey hung off the back of the UK TGI. They went on to pilot a second study including only 50 major magazines of the 180 measured currently by NRS and to measure this by the CAPI system (Computer Assisted Personal Interviews, which RSL had been developing for JICNARS as an alternative future method of collecting NRS data).

All this resulted in the rebel newspaper groups trying to persuade their colleagues in the NPA (Newspaper Proprietors Association) to fund their own survey for sale to agencies unless JICNARS reformed itself in a way that would be acceptable to them.

The views of all the newspaper people were not identical, but certain minimum requirements emerged, many of which also had the support of much of the rest of the industry. These were:

1. to abolish the technical sub-committee and rely mainly on the skills of the research agency for technical advice;
2. to set up an organisation subject to the normal commercial constraints and to abolish committees;
3. to introduce an element of deliberate replacement on the board of directors to introduce new thinking to the survey;
4. to make the organisation more user friendly and to respond faster to change;
5. to produce results faster and more frequently; and
6. to measure only newspapers and the major magazines.

The last point was a combination of the view that the survey measured too many titles and this could, in some un-quantified way, be affecting the survey, but there was also a feeling that too many small magazines had too much say on a survey that they contributed too little towards financially.

The magazine industry supported most of the NPA objectives, but were not too concerned about the speed of reporting or more frequent reporting. They also, naturally, wished to continue to measure all the magazines - some 180 - rather than just the top 50. Indeed they would have been forced to carry out an extra survey of their own had the newspaper plan gone ahead.

Agencies, in the form of the Institute of Practitioners in Advertising supported joint measurement of magazines and newspapers, joint industry control and expressed themselves satisfied with JICNARS' previous research specification and indeed said they would not pay more, above annual inflation rates for alternative specifications, demanded by the publishers. The advertisers who paid nothing towards the survey, or paid for it entirely, depending on your viewpoint, also supported joint industry control and the measurement of newspapers and magazines together.

It is fair to say that these two organisations also accepted many of the more general criticisms levelled at JICNARS and also sought reform of it as an organisation. Individual media directors, when speaking on their own behalf rather than through their trade organisation, had individual viewpoints but the majority favoured continued joint industry control of the survey and some favoured separating the measurement of newspapers and magazines.

It was decided that JICNARS should be wound up and the registered company NRS Limited was set up to take over publication of the survey and tackle the areas that had been criticised in the past.

One final piece of background is worth looking at in greater detail - the desire to introduce CAPI as the data collection method.

This was favoured by many of the publishers and particularly by the two rebel organisations that were driving the demand for reform for two reasons:

1. it would lead to faster reporting; and
2. it was itself a high-technology method of data collection to apply to the survey.

The importance attached to this was to do with marketing the press medium to advertising agencies.

It was believed that with fragmentation of electronic broadcast media the high national coverage that could be offered by press media would come into its own again and begin to supplant the supremacy that TV had enjoyed as an advertising medium in the UK. If this was to happen, it was believed that the attitude of planners and buyers to press media needed to be shifted.

Television was seen as exciting, up to the minute, flexible and fast and these qualities were reflected in its measurement by meters, minute by minute with computer analysis technology.

By contrast it was felt that press research methods (and to some extent JICNARS as an organisation) reinforced the way press was seen - old fashioned, boring, slow and unchanging. It was believed that CAPI could contribute to changing those views, by being faster, more frequent in its reporting and a high-tech method of collecting the data.

NRS was happy to support that desire as CAPI also introduced greater control over the administration of a complex questionnaire like the NRS and also greater flexibility to introduce controlled change to it.

Open tender for the new specification resulted in NRS accepting Research Services Limited's tender and their proposal which incorporated the following changes;

1. a change of sampling frame (Postcode Address File instead of Electoral Register) together with disproportional sampling of ABC1's, as specified in the tender;
2. CAPI data collection; and
3. some changes to the way the questions were asked which reflected the greater flexibility of CAPI plus changes which RSL judged would improve the measurement of readership by the survey.

The new package was piloted in the Autumn of 1991 and introduced in two stages to the survey; on January 1st 1992, the sampling changes were introduced and data collection by CAPI, together with the new readership questions, started on July 1st of that year.

The pilot predicted very well the results as they appeared for the survey itself:

Index of Average Issue Readership

	Pen & Paper Jan-Dec 1991	Pen & Paper Jan-June 1992	CAPI Pilot 1991	CAPI Jul-Dec 1992
Dailies	100	95	96*	104
Sundays	100	96	98	99
General Weeklies	100	92	100	100
Women's Weeklies	100	92	113	104
General Monthlies	100	95	106	111
Women's Monthlies	100	98	115	112
All the above	100	95	104	105

*Without direct "Yesterday" prompt.

The only major difference between the pilot and the six three months of results was for national daily newspapers. In their case we changed the question by introducing a "yesterday" prompt for them alone following our experience with the pilot, as we feared their results had suffered due to its removal from dailies for the pilot. It is true that it was also removed as a prompt for other titles but it was felt that daily newspapers might be being particularly disadvantaged by its withdrawal. This view was reinforced by our expectation that the readership of daily newspapers, from past experience should be fairly robust when faced with change to the questioning methodology.

If we compare the results for January-June 1992, when we used the old pen and paper technique with July-December 1992, the changes resulting largely from our changed questioning techniques can be seen most clearly. PAF as a sampling frame was common to both half years and while we cannot rule out a CAPI effect, we believe the change to the questions contributed the major effect.

	January-June 1992 Old Questions Pen & Paper PAF	July-December 1992 New Questions CAPI PAF
Dailies	100	110
Sundays	100	103
General Weeklies	100	109
Women's Weeklies	100	114
General Monthlies	100	111
Women's Monthlies	100	114
All the above	100	110

RSL believe that in general the new data are closer to the results that accepted research wisdom would expect. In the past we have found that newspapers were very robust and least effected by changes to the readership questions and detailed studies have suggested that the old technique, underestimated magazine readership. We previously tended to miss infrequent readers and we are now picking up more of these. The higher daily newspaper figure could be explained by the extra "yesterday" prompt for the category.

The board of NRS have accepted RSL's viewpoint on the quality of the new data and have enthusiastically promoted CAPI as new and better data. At the same time CAPI data is different and non-comparable with the old data, so the industry has had to accept a hiatus in the trend data we provide.

Most publishers were happy with the new CAPI data and welcomed them. If all the figures had been down it might have been a different story!

We still have much work to do. Our new sampling frame is a more complete one, but currently leads to lower response rates. Much energy and investigation is being put into boosting this.

The introduction of the CAPI machine and questions lead to a further small down turn in response rates and we are not yet sure why this is or the effect it might have on the readership measures.

We also know that results, using the same methodology as previously but the new sampling frame, in the first half of 1992, produced lower newspaper readership figures than we would have expected from the previous relationship between readership and circulation. So we have to examine all our data minutely to throw light on these things and the new survey is bound to continue to evolve.

But the new organisation of NRS and new methodology has held the survey together. We still measure all print media together on the same survey and we do it faster and can report on shorter databases.

The knight's armour is beginning to shine again and in 1993 we intend to polish it further. It is my ambition that the NRS should be viewed by its new customers in the way it used to be and the dark days of 1988-91 should be put behind it. I suspect, however, that our new customers are less starry eyed than the previous ones used to be and the survey may be called to account more often in the nineties even if it is getting it reasonably right.

