

MEASURING READERSHIP OF NEWSPAPER SECTIONS ON THE UK NRS

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The Challenge

One of the principal challenges facing Britain's NRS at present is the problem of how to measure the readership of individual sections of newspapers.

There has been an explosion in the number of newspaper sections in the past few years. In 1987 there were just 7 newspaper colour supplements, by the end of 1994, this had grown to 54 main supplements/separate sections.

The demand from particularly advertisers and their agencies for readership measures of these new sections has grown accordingly as they attract very large amounts of display advertising revenue (*Figure 1: Proportion of annual display advertising revenue from sections with no NRS measure 1993/1994*).

Some of these newspaper sections, in fact, are attracting similar amounts of display advertising revenue as the largest of the paid-for consumer magazines, and many of them much more than the smaller magazines measured by the NRS (*Figure 2: Comparison of display advertising revenue between newspaper tabloid weekend sections and some large consumer magazines*).

Therefore, the need for a measurement of, at least, the more important sections (in ad revenue terms) is clear. Yet although it is easy to make a demand, it is more difficult to find a solution. Politics, finance and technical difficulties all must be overcome.

The Problems

Market Dynamics

Sections are inherently difficult to measure, not least exacerbated by their diversity and for some, their transient nature, or even, existence. The problem is compounded as publishers are continually revamping their packages, sometimes in response to market opportunities, often in response to changes introduced by competitors, and more recently by the growing threat of rising print costs in the UK.

Section Recognition?

Continual product rationalization means that readers (particularly infrequent readers) are likely to have severe difficulties in remembering some of the sections they have read, or even understanding what is meant by a section. This led NRS Ltd to commission some qualitative research in mid-1994 to provide guidance on how well readers can identify newspaper sections. The research found that readers' knowledge of sections' titles were indeed variable, and that for some sections, even when prompted with a short description, some readers did not recognise either the sections or their titles. This confirmed our belief that sections readership should be measured off-survey, using some form of page-recognition technique as readers' identification of sections via their mastheads (the current NRS methodology for prompting recall of parent title readership) was unlikely to yield reliable readership measures for all important sections (such methodology would certainly need careful validation) even if the timescale of the painstaking validation programme was acceptable.

Possible destabilization of AIR

There is also the additional danger that because of informant confusion and unreliable recall of sections' readership using the current prompt aids, the basic trading currency of average issue readership could be destabilised, with the potential loss of credibility for the NRS. The previous chart in Figure 2 actually highlights another major consideration. Because many of these unmeasured sections are indeed attracting very large sums of display advertising revenue, it is crucial that the measurement of their readership reaches the same stringent standards adopted by the NRS. Otherwise we could debase the Survey and there is then little justification for measuring the parent titles stringently in the first place.

The NRS has to guard the main currency and must be fully defensible of the data it produces.

Length of interview

RSL, NRS' research contractor, also believe that if sections are added as individual titles onto the Survey, the interview could be too long to be practicable. This could also endanger the overall response rate of the Survey.

A Possible Solution?

To concentrate the industry's mind, NRS Ltd briefed RSL last year to develop a proposal for a one-off survey to a budget of £250,000 (a sum that was considered to be more realistically affordable than ideal) measuring only those sections which generated (or had the potential to generate) substantial display advertising revenue, some 53 of them in total. The purpose of this was to provide a focus for discussion of the sections that need to be measured, to gauge the willingness to fund and to judge the size and nature of the study that would be acceptable to the industry.

This study would employ a page-recognition technique using full issues of newspapers to overcome the previously identified problem of informant confusion and unreliable recall (BJM Qualitative Research May 1995). 500 readers of those issues of a publication with a section to be measured would be sampled using quotas by frequency of reading, readership of yesterday's, Saturday's or Sunday's issue of that publication, source of copy and demographics. Interviews would be conducted in halls so that all relevant issues would be available to be shown to the selected informants.

This option was rejected for two main reasons:

- 1) Due to the relatively low budget, the sampling (quota) could be more biased than would be acceptable for the main Survey.
- 2) Due to the necessity of keeping the size of the sample at an affordable level, hence relatively small for each newspaper, sampling variability would also be much greater than would normally be countenanced for the main Survey. In fact, the margins of error when comparing the readership of two sections of two different newspapers could be nine times greater than when comparing the two parent papers' AIRs.

This was unacceptable to both the buying and selling side of the industry, particularly for a *one-off* study, which could become obsolete within six months under current market conditions, as too much advertising revenue would be subject to the vagaries of sampling error. Sample size has further importance in that users wish not only to analyze readership of individual sections, but also to examine subgroups of the population eg. readership of business sections amongst ABs or businessmen.

It was recognised that it would be just as damaging to the NRS to be seen to produce inadequate solutions as it would be for the NRS to be seen to be doing nothing.

Other Options

Once the initial proposal had been rejected and we had teased out some further criteria the industry would require, we extended this process with six other options, produced by RSL acknowledging their respective limitations, to aid further discussion, judged against the ideal survey objectives set out below:

- 1) The survey was to provide an *on-going* measurement of newspaper sections.
- 2) The survey had to be able to cope with measuring both *physically separate* as well as *in-paper* sections.
- 3) The sample size has to be adequate for statistical comparisons and analysis of sub-groups.
- 4) The standard NRS interview had to remain intact.
- 5) Ideally the survey was to measure via page-recognition; any other prompt aid was to be validated.
- 6) The sample must, of course, be representative.

Option 1 : A Parallel Page-Traffic Survey

A separate but parallel continuous survey, with random probability sampling to the same standard as the main Survey. This suggested a total sample of 20,000 adults per year, to yield at least 2,000 readers per newspaper (with disproportional sampling). Interviews would be conducted in informants' homes and a page-recognition method would be employed. The results could then be fused with the main NRS.

The main advantages of this option are the high sample quality and size; using what is considered to be the best interview method on a large and highly representative sample. The obvious problem is the very high cost: at least £1 million per year, possibly more. The other consideration is that fusion might not be considered an adequate solution by some.

Option 2 : NRS Sub-sampling

An on-going page-recognition study of one or two newspapers per respondent, conducted at the end of the main NRS interview. Each interviewer would carry two newspapers and respondents who happen to be readers of a title carried by the interviewer would be sampled. The sub-sampling would be disproportional to obtain a minimum of 200 readers per title per annum.

The main advantage of this option is the cost: at £250,000 - £300,000 per annum, it would obviously be more affordable than option 1. There would also be less of a danger of seriously overloading the Survey, sampling would be representative and the best interview method can be used. But the sample sizes would be small (even less than the 500 sample size in the original proposal) and publication might be practical only in hard-copy.

Option 3 : The "RSL Initiative"

About a year ago, RSL had proposed the idea of measuring sections as part of the main NRS interview using prompt cards relating to actual issues seen implying a shift from average-issue-readership to specific-issue-readership for newspaper readership data. Only sections for which prompted recall is validated would be reported.

The advantages are obvious. The additional cost to redesign the survey would be relatively modest and full use would be made of the whole NRS sample for all sections, with no additional analyses or fusion problems. However, there are doubts as to the accuracy of prompted recall for sections - though this could be tested. Another disadvantage is that this technique would not be able to measure in-paper as well as separate sections - this would create unfair competition between those sections of similar editorial content but different format. Lastly, the change in currency from average-issue-readership to specific-issue-readership is an alternative that member bodies have said should be avoided, if at all possible, as this would lead to a different currency for newspapers and magazines.

Option 4 : Re-interviewing NRS informants

Based on their known reading claims, NRS informants could be re-interviewed either at home or by post (perhaps combined with telephone recruitment) using a page-recognition method.

The main benefit of this option is the ability to tie the results back to the data collected from the original main NRS interview. However, there is little doubt that there would be substantial non-response at the re-interview stage. The in-home approach would also be very expensive (around £1.5 million or more per annum) because of the scattered sample. The postal method would be cheaper but might prove unworkable.

Option 5 : Develop "topic interest" questions

For some time the NRS has carried a question which runs through a list of topics, such as UK News, Sport, Business News, Personal Finance etc, as a surrogate predictor of likelihood of reading a newspaper section devoted to a given subject. However, the question is asked only of all newspapers and/or all magazines generally and not specifically by title. These questions could be developed to be either more focused and/or newspaper title specific in the hope of providing a better estimate of what sections are read.

Although this could be a workable solution for planning and targeting, topic interests are not necessarily good predictors of sections' readership in all cases and for all titles. Furthermore, this option would not provide readership measures of many key sections (the tabloid weekend sections, in particular) as they are very general in their editorial content.

Option 6 : Attitudes to sections

Another indirect measure could be a survey of attitudes to sections in general (eg. whether reading behaviour is affected, how individual sections are perceived and how they are generally used) using either a leave-behind self-completion questionnaire or incorporated as part of the main NRS interview at the expense of other questions (eg. the product/marketing questions).

However, although this could yield interesting data for planning and targeting, it would not actually be a sections readership measure and as such would be a poor substitute for the information that users really want.

A Future Route Forward

It became clear, in early 1995, that the combined effects of the recession and a massive increase in newsprint costs mean that the extra funds necessary to carry out off-survey, page recognition research to measure the readership of newspaper sections, would not be available in the medium-term future. The only prospect, for the near future, will be to tackle sections measurement on-survey, so only the most consistent, separate and most strongly branded sections could be considered.

At this point, the NPA, the Newspaper Publishers Association, asked NRS to examine the possibility of adding ten or eleven "review sections" to the main survey. They argued that this would only take up a small amount of extra interview time and that questions not dealing with readership could be sacrificed to maintain the overall interview at the same length.

Since NRS already measures colour supplements as separate titles (these were the first newspaper sections to be published and are now very well established) the review sections are similar, all being separate from the main newspaper, fairly consistent in production and generally strongly branded. They thus seem to be the most likely sections to be susceptible to accurate measurement via title recognition prompting and if they prove so, would mean that the NRS is able to provide readership measures for sections which account for around 95% of display advertising revenue in newspapers.

The Board of NRS were enthusiastic to fulfil this request if it proved possible and even agreed to immediately release funds to carry out qualitative work to help develop the necessary questions. As in the past, for sections measurement the request sounds deceptively simple but proves much more complicated to carry out.

The review sections are easily confusable, for respondents, with other separate sections produced by some newspapers and some would argue, even with the colour supplements that we measure already. The advice of our research agency (Research Services Limited) and our technical consultant, Michael Brown, is that they must be prompted, together with all the other separate sections produced by the parent paper, in order to reduce such confusion, and to stand any chance of gaining a reasonable estimate of their readership. Furthermore, this would entail a painstaking development programme to ensure that the measurement produced is reasonable (validation work) and does not inadvertently effect the basic measures (split sample testing) in order to preserve the standard AIR (average issue readership) - the "currency" that all sides of the industry have said they wish to preserve. In order to avoid bias in the review section measurement, all other sections will also need to be asked about in the same way, even if we have no expectation of producing a reasonable readership estimate for them and no intention of publishing the results.

Further, to avoid (as far as possible) damage to the "currency", the standard newspaper questions and colour supplement questions must be asked about as they are at present, at the beginning of the interview, and the review sections must be asked about after they, and all the other titles, Sunday newspapers and standard magazines, have been measured using the current methodology. This means that newspaper colour supplements would be asked about and measured twice! This is confusing for the survey user. (Which measure is the real one, they would quite likely be different?) It may be more confusing for the respondent who would be asked the same question twice! Respondent confusion, resulting in a lack of comprehension of what we are really trying to get at, could cause poor quality responses to not only the second measure of colour supplement readership but also the readership of the review section we are attempting to measure.

A more logical approach would be to initially establish readership of "any part" of the parent title and then go on to ask respondents that claim readership, which sections they have read. This would, again, be after all the standard readership questions have been asked and using a prompt showing all the sections of the parent paper that are published. In this case, the intention would be to publish only the readership claims for the colour supplement, the review section and, it could be argued, the main newspaper. This is a long way removed from preserving the present "currency" and could move a step further away. It has already been suggested that under these circumstances, readership of "any part of" should also be established for standard magazines.

So, will the industry accept the changes of "currency" involved in carrying out the seemingly simple request of adding ten or eleven review sections to the standard survey? If not, will it be willing to accept the difficulties involved in trying to do the job less disruptively but less logically? Will either of these solutions work and produce data that stands up to validation? Will users be willing to wait for the painstaking development programme necessary to prove that the system produces valid data and does not interfere with basic measures?

RSL and Michael Brown put forward a development programme that involved qualitative research to help develop suitable questions and test comprehension of them, an off-survey, split-sample test to ensure that the new questions do not adversely effect the standard readership questions, a more substantial, split-sample test to confirm this on survey and give an indication of the nature of the new measures and finally an issue-recognition study to validate the readership levels produced by the new method.

By my estimation, even if all this was achieved with a speed of execution, discussion and decision taking that I have never previously witnessed for an industry agreed project, it would take us through to the end of 1996. If this is so, it should make a fascinating project to report on at the next World Wide Readership Symposium.