

# 1.9 The evolution and current state of national readership surveys in Belgium

## INTRODUCTION

In order to be as compatible as possible with the contributions of our UK and US colleagues, considered as benchmarks against which will be compared the variations in technique, of data collection and treatment employed by the various other countries, this paper will broadly cover two topics: the historical development of readership research in Belgium, drawing attention to selected, major methodological evolutions which prepared and explain the present thinking in our market; and the current methodology of the National Readership Surveys financed by the CIM (Centre for Information on the Media).

It has to be clear, however, that we do not intend to provide a complete history of Belgian readership research.

There will be no mention in this paper of the numerous *ad hoc* research projects originating from individual publishers and other sources, related for example in the past few years to subjects and topics such as: the quality of contacts between readers and print media vehicles, the editorial contents which generate and explain interest or attachment, the probability of exposure to ads, the correlates with ad impact, psychographical description of readers, and so on.

We are not going to comment either on the evolution of techniques regarding the measurement of exposure to other media such as Radio or TV.

The focus will be on *the measurement of the audience of the average issue of newspapers and magazines or periodicals*. And it should be noted that the author is only expressing his own views . . . even if they are very likely to meet, in the current state of the art, those of the CIM Board of Directors and its Technical Committee.

## HISTORY OF THE BELGIAN READERSHIP SURVEYS

### Some prehistorical contributions (1952–69)

The very first readership surveys in Belgium were carried out in the 50s at the initiative of some advertisers or on behalf of individual publishers.

For example, DOXOMETRIE (a research agency which would later become the Marketing Division of SOBEMAP) carried out in 1952, a survey determining

exclusively the numbers of readers (with a very broad definition) of the main newspapers and periodicals, in the population aged 18+.

Then, in 1955, the same, but only in the city of Brussels, and in 1959, a first description . . . exclusively in socio-demographical terms . . . of the readers (15+) of the newspapers and a few magazines.

At the end of 1959, the Centre d'Etude Belge des Supports de Publicité (CEBSP) was created. This non-profit organisation grouped advertisers, media and advertising agencies and had as its only objective the quantitative description of the audience of the various media.

It financed and conducted: in 1960, a readership survey; in 1962, a study of the exposure to Radio and TV both carried out by CBEM (Centre Belge d'Etudes de Marchés); and in 1964, a study of exposure to Cinema advertising, carried out by SOBEMAP and covering for the first time the total population (13 to 65 years old).

### Evolution of the definition of reader (1965–69)

The 1965 survey (CEBSP-SOBEMAP) introduced a new definition of average issue readership.

From then on, interviewees were considered as 'CEBSP readers' if they had read, looked through or turned the pages of an issue (any one, recent or not) of the press media concerned, anywhere, but within a reference period defined by the frequencies of publication of the media concerned (ie yesterday if a daily, within last seven days if a weekly magazine, and so on).

This definition has been kept unchanged for fifteen years.

It was also in 1965 that the frequency of reading was measured for the first time. As everywhere, calculations of the numbers of readers based on this other type of information gave rather different results from the ones obtained by straightforward questions on recent reading.

It was decided to correct reading frequency answers on the base of the percentages of CEBSP readers observed in each class of frequency (deriving more accurate reading probabilities).

The same sequence of questions was applied in the 1969 National Readership Survey (CEBSP-SOBEMAP). A few methodological changes should be mentioned:

(a) the study covered Press, Radio, TV and Cinema, as all the following ones have done.

(b) the universe included all Belgian individuals (ie to be found on the voters lists) aged 15+.

(c) the results of the reading, viewing, listening frequencies, duly corrected, were published; it consequently became possible to analyse the cores of most loyal readers.

(d) questions related to the origin (way of acquiring) the last single copy read were introduced, and the publication of their results led to a lot of controversy, probably because of the inability of respondents to make a clear distinction between actual subscriptions registered by the publisher and permanent agreements made with the newspaper-shopkeepers who delivered in that time, quite often at home, all issues of the media chosen.

(e) following the paths opened by the work of Marc and Agostini in France, we also introduced a few questions concerning the ownership of durables and the interest felt for information related to several topics or product sectors; those data were used, with the financial support of *Reader's Digest*, for developing the very first attitude scales (propensity to spend money, interest for innovative products), widely used for defining target groups in the next two years.

#### The CIM period – 1971 to date

On 12 May 1971, the CEBSP (responsible for conducting the readership surveys) merged with OFADI (the organisation which has audited the circulation figures of the press media since 1951).

The resulting new organisation, broader and more powerful, took the name CIM (for Centre for Information on the Media).

In 1972, the first official readership survey carried out (by SOBEMAP) on behalf of the CIM was created following the 'Single sources data' model. The interviewees, and consequently the readers of the various press media vehicles, were described – not only in socio-demographical terms – but also in terms of their consumption/purchase/use of services habits.

The concepts of 'loyal readers' (corresponding of course to the highest reading frequencies) were introduced officially and there was also published, for each medium, the evolution of the total readership as a function of the number of issues (accumulation process).

The sample size remained, as in 1965 and 1969, 10,000 interviews.

The Media-Products Survey CIM-SOBEMAP published at the end of 1974 included some important methodological innovations:

(a) a total sample of 16,000 interviews and an increased number of sampling points (1,600 drawings of communes instead of 1,000 in the past).

(b) a uniform distribution of the interviews over a whole year (in five waves, each nationally representative), providing the possibility of seasonal analysis.

(c) a large increase of the number of product sectors studied and numerous improvements in the formulation of the questions used for approaching some of the markets.

(d) the introduction of the concept of 'Principal responsible for the purchases of the household': the person who claims to do the purchases at least six times out of ten as regards the supply of food products, drinks, detergents and so on. . . .

(e) rotation in the presentation of the mastheads related to dailies-weeklies-monthlies and bimonthlies, in order to avoid sequence effects.

(f) the study – on a national level, now – of a few large free (door-to-door) press media, which were treated for the first time exactly in the same way as the paid-for press media.

(g) the experimental introduction of attitudinal questions . . . which disappeared later on because of the endless possibilities offered by the product-usage data and in order to keep the interviewing time within reasonable limits (so far as possible).

The next CIM Survey was carried out by SOBEMAP in 1977 and covered again a full calendar year. The total number of interviews was brought back to 10,000, while increasing the total number of sampling points (2000 drawings, leading to the random selection and visit of 1027 different communes) in order to improve again the statistical reliability of the readership figures obtained for regional or, rather, local press media.

Other slight changes occurred as regards:

(1) the rotation in the presentation of mastheads related to different types of press media: six different versions of questionnaires instead of two in 1974.

(2) the definition of the purchasing responsibilities, each individual being now interviewed on all the products he bought personally (in order to obtain a complete answer to the classical question: who is purchasing what?).

(3) a reduction of the average duration of the interview, by developing two versions of the 'products' questionnaire, at least as regards the women.

(4) the correction of the readership figures to take into account short periods of non-publication of specific media.

(5) the publication, in the survey reports, of the statistical confidence limits of all the readership figures mentioned and the methodologically wise but politically rather difficult decisions: to describe only in broad and simplified terms the readership of media which were represented in the actual sample by 50 to 99 readers; and not to publish any figures concerning media for which one has not met at least 50 readers.

(6) the mention, in the reports, of the yearly average circulation figures (provided by CIM too) for all the media which agreed to submit themselves to this other type of

control.

(7) a straightforward possibility of comparing the profile of the readership of any given media with that of the total universe.

(8) a simplification of the processes applied for correcting the reading frequencies, using calculation of probabilities instead of a simulation process at the individual level.

In late 1978, the CIM decided to go over to permanent readership measurements leading to annual reports.

The fieldwork started actually in June 1979 and the first report – covering 12 months of observations – was published in September 1980.

As far as the Press media vehicles are concerned, the techniques remain the same as in 1977. However, it is worth mentioning:

(a) a further increase of the number of sampling points (1200, covering some 550 different communes) and a reduction of the sample size: 6000 individuals for this first year.

(b) the introduction of a representative subsample of foreign residents . . . obviously not found on the voters lists but strictly necessary for avoiding an error consciously made from the beginning: the extrapolation to the whole universe of residents (including foreigners) of results obtained on a sample of Belgians.

(c) an increase in the numbers of classes or categories on the scale of reading frequencies, this in order to calculate with more accuracy the final reading probabilities.

(d) a revision of the breakdown into socio-economical classes (splitting further one of the now classical strata).

### THE CURRENT CIM TECHNIQUE

In the current state of progress (1980 survey and report), the CIM-SOBEMAP sample is designed to be representative of the total adult populations – defined as those aged 15 years and older – of Belgium, including foreign residents.

A two-stage, stratified, probability design is employed, involving the selection of sampling points as primary sampling units and, at the second stage, of individuals within the randomly selected communes.

A sampling frame of all 'communes' in Belgium is first created. This frame is stratified into ten geographical divisions (our provinces plus Brussels, treated separately) and, second, within each of these geographical divisions, by urbanisation grade or level (big cities, smaller towns, non urban areas).

Within each of the resultant strata, communes are ordered according to their numbers of residents.

1200 communes (obviously not all different from

each other) are then selected with probability proportional to the size of their population, using a random start and a fixed interval procedure. Four separate drawings are made per year, in order to protect the representativeness of every three-monthly wave of interviews.

Within each selected commune, names are randomly selected from the electoral register, again using a random start and fixed interval technique. Because these electoral registers do not include persons aged 15 to 17 years or foreign residents, appropriate complementary sampling designs needed to be developed for covering these two specific categories of individuals.

Younger people are sampled by applying the following rules: interviewing all female individuals aged 15 to 17 (pertaining to the household visited) when the person drawn from the electoral register is a male head of household; and interviewing all male individuals aged 15 to 17 (again, in the household) when the person drawn from the electoral register is a female head of household or the wife (or living companion) of the head of household.

Foreign residents are sampled using a quota procedure, based on the latest official figures – broken down by nationality – regarding their geographical distribution; the resulting sample of foreigners is weighted in order to take into account the probability – per nationality – of understanding one of our national languages (this on the base of an *ad hoc* survey, carried out in 1978–79).

Interviewers make at least three calls, on different days and at different times in the day, before abandoning an attempt to interview a named person. No substitution is allowed. For the period June 1979–May 1980, interviews were obtained with 70% of named persons, whether pre-listed or listed in the field (younger individuals). And the finally available sample included 6186 individuals in total.

Describing now the structure of the interview itself, we will emphasise the similarities to, and discrepancies from the NRS techniques used in Britain while describing in detail only the readership questions: firstly, six versions of the readership questionnaire are currently in use; they comprise all possible permutations of the three basic groups of press media: dailies, weeklies, monthlies and bimonthlies.

Secondly, for each group of press media, the respondent is handed a set of cards (or logos) reproducing – in black and white – the mastheads of the media covered by the survey; they are not bound in a booklet and interviewers are asked to shuffle them (in each media basic group) before each interview.

Thirdly, actual cover pages are currently shown for a few media which could generate confusion (for example, because of a strong similarity in names or when names

# 1.9

## The evolution and current state of national readership surveys in Belgium

are changed during the fieldwork).

Finally, the sequence of readership questions is as follows: which ones read, looked through in the past few months; for each of the media thus selected: overall frequency of reading, measured on a five-point semantic scale (of which the wording is of course adapted); reading in the period of reference (recent reading of any issue, anywhere), adapted to the frequencies of publication; and method of acquisition of this recently read issue (personal subscription or subscription of another member of the household, personal purchase, purchase by somebody else in the household, received, found, free distribution), in order to define primary, secondary, tertiary readers.

The readership section completed, the interview turns to a measurement of the exposure to other media and to the product usage questionnaire, which are only briefly listed here, in the order in which they occur:

- (1) cinema going is measured in terms of claimed frequency, and the number of visits in the last seven days.
- (2) radio listening questions cover a total of six different channels (plus all others) and questions include: overall listening frequency and definition of the channels listened to yesterday; the hours of listening are asked only (quarter-hour by quarter-hour) for one large station.
- (3) the television section covers 14 different stations or channels; the related questions include overall frequency of TV viewing, which stations viewed yesterday and – for each of them – at what time of the day (quarter-hour by quarter-hour).
- (4) an extensive classification covers geographical location, education, responsibility for household duties, the household composition in considerable detail, occupation of informant and head of household, income, characteristics of the home.
- (5) the product usage section (which was applied in a second visit in 1972 or 1974 and reduced since then in order to be accommodated in most cases within the framework of a single interview) includes purchase/consumption of mass consumption products, the ownership of durables, the use of numerous financial services, vacation habits and leisure activities.

For the period June 1979–May 1980, the average duration of the resulting interviews was 50 minutes for male respondents and some 60 minutes for female respondents.

Let us now briefly describe the data treatment and processing subsequent to the fieldwork stage.

After normal editing and coding, the data are weighted to correct population proportions within each of 40 cells, formed by interlacing sex, five age groups and four geographical regions; the resulting distributions

are checked against official data as regards the level of urbanisation and the number of interviews per day in the week are balanced, separately for men and for women.

This reweighting is carried out for each three-month fieldwork period. And – as already mentioned – the subsample of foreign residents, not at all negligible since they represent not less than 6% of the total universe, is treated separately.

The only corrections possibly introduced at later stages are those related to period of non-circulation of some media; they are carried out if and only if the publisher concerned obtains CIM permission by proving his publication suffered material loss of circulation.

In the current state of the agreements, reports are published each year and the next one is consequently due to come out in September 1981; only 4000 interviews will be carried out this year but results will be published on a sample of 6000 again by using overlapping between years (Cf: Germany).

The reports, which are sent to all the subscribers to the study (ie the majority of CIM members), include:

- (a) tables of average issue readership for all adults, men, women, main responsibility for households purchases, with very detailed geographical and socio-demographical breakdowns in each of these subuniverses.
- (b) the statistical confidence limits of these readership figures.
- (c) the build-up of the readership with the number of issues (accumulation) ie the estimated penetrations of two, three, ..., 12 issues of each title, calculated by the binomial expansion of the reading probabilities.
- (d) readership profiles.
- (e) relationships between the reading of the various media and the purchase/consumption/use of the various products or services (looking separately, in many cases, at the heavy users).
- (f) a mention of the average circulation figures (covering the whole year concerned), each time they are available.
- (g) average issue duplication of readership, for all possible pairs of titles and separately for men and women (including duplications with TV or Radio channels and cinema going).
- (h) very detailed data on TV viewing (not only per channel or station but also for some time periods in the day, according to the existing advertising tariff groups).

In the framework of the current agreements (valid still for several years) between CIM and SOBEMAP (which are sharing all the survey costs), no tape is available. But these National Readership Survey data may be accessed by all the subscribers, off-line via SOBEMAP and on-line via SOBEMAP and another computer bureau licensed by CIM for this purpose.