

PRESS READERSHIP MEASUREMENT IN FRANCE THE 1993 REVOLUTION

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At the beginning of the year, the general organisation of major media readership surveys was radically changed. As recently as five years ago it was the Centre d'Etudes des Supports de Publicité" or "Center for Advertising Media Studies", which produced the majority of this data. The CESP is an association which groups the media, advertising agencies, central media buying agencies, and advertisers. This association still exists but its purpose has been totally transformed.

Today, each media has its own research as its disposal, encompassing methodologies that it has accepted or even initiated and provided by a suitable research organisation.

The table below summarizes the situation.

Media	Methodology	Research project manager	Sub-contracting agencies	Professional relationship
TELEVISION				
Main study	Automatic panel	Médiamétrie	SECODIP AUDIMEDIA	Control
Additional studies	Hook-on study with interviews		(ISL Demoscopie) Médiamétrie	
RADIO				
Main study	Daily survey 75,000 interviews/year	Méediamétrie	Médiamétrie	Control
Additional study	Panel	Médiamétrie	Médiamétrie	Control
NATIONAL DAILY PRESS	Daily survey 24,000 interviews 6 months/year	EUROPON	IPSOS	Control
REGIONAL DAILY PRESS	Daily survey 35,000 interviews 6 months/year	SPQR	IPSOS	Control
MAGAZINES				
Main study	Daily survey 18,000 interviews 10 months/year	AEPM	IPSOS/ISL	Control
Additional studies with specific targets: -Business managers survey) -Upper income	Annual surveys 10,000 interviews/year	IPSOS	IPSOS	Control
Other targets	Annual surveys 30,000 interviews	SOFRES	SOFRES	No
BILLBOARDS				
Main study	survey on demand 1,000 interviews per town - 56 towns	le Media	BVA	Control

It may be helpful to say a few words about the Media Market in France, about multi media research and so on. It is important to note that in each case we come across these same, common elements:

- this research is always initiated and financed by the media
- there are a limited number of research institutes involved: that is primarily Médiamétrie, ISL and IPSOS
- the CESP exercises control of both the survey definition, since it must be approved prior to the start of the study, as well as the quality of the finished survey.

As the present Symposium is concerned with press readership measurement, I will be concentrating on the situation for daily press and magazines.

Some history

In France, television has always been a special case. Ten years ago, all TV channels belonged to the public sector and worked together with a research body called the CEO (Centre d'Etudes d'Opinion) which was governed by the Prime Minister's office. The CEO managed a panel, whose members filled in TV diaries. This panel was progressively equipped with first generation audio-meters recording the simple fact that the main TV set in the household was switched on or off, and if on, to which channel. The recruitment and management of this panel was carried out by SECODIP.

In the mid-80s, two phenomena created a further development of this situation.

Firstly, technological progress made it possible to consider the transition from household to individual audio-meters.

Secondly, the importance of TV in the advertising market was increasing, thus making it necessary to have a higher level of professionalism of the CEO. In these circumstances Médiamétrie was created in 1985, and it replaced the CEO. After a few initial teething problems, it won the audio-meter contract from the CESP in 1987.

Médiamétrie's success is attributable to several important reasons:

- Firstly, they had the wisdom to build on the inheritance of the CEO, their predecessor. Today this same motivation continues as the press is defining its own system.
- Secondly, they have been cautious in their relationship with the CESP, which due to its double and simultaneous role of buyer and user, was trapped into a position which was too broad and ambiguous.
- Thirdly, they have made clear their wish for continued modernisation at both technological and organisational levels.
- Fourthly, they have chosen to work closely with experts in this area, either from existing market research companies, or newly created companies which have a technological plus.

The evolution of the French market, was therefore first TV followed by radio, and then by press, which continued in the same pattern.

Press/AEPM

About ten years ago a large number of magazine editors got together within the Press Promotion Association to protect Magazines against other competing media in the advertising market, and also against pressure from the public authorities. Their principal objective was to show the strength of magazines when compared with the development of television and other media.

At the beginning of 1992, APPM, or the Press Association, considered that their readership survey, which had been hitherto conducted with 15,000 respondents per year, was no longer satisfactory.

A major criticism concerned the difficulty of changing a survey which lay at the head of the CESP, and where the operational procedures were very burdensome because it was, and still is, a centre for negotiation between the user and the major media, including television, radio and press.

The APPM therefore created, the AEPM (Association for Press Magazine Research) whose purpose was to start a new general readership survey at the beginning of 1993. This survey began on the 1st April 1993. The first results are expected in the Autumn. Even if some users are disappointed that, due to the new survey's structure being too similar to that of the previous one, the table below shows that, in many ways and in substantial ways the magazine media and the AEPM have decided to make real changes.

FORMER/NEW NATIONAL PRESS MAGAZINE READERSHIP SURVEY

	Former (until Nov 92)	New (from 1/04/93)
Sample		
- definition	quotas	quotas
- size	15,000	15,000 + 3,000 (sample boost of AB households)
Methodology	face-to-face in-home	face-to-face in-home
Data collection	12 months readership (on logos grouped by card) readership frequency previous period's readership	12 months readership (on separate logos) readership frequency previous day's readership handling occasions previous period's readership
Research project manager	CESP	AEPM
Sub-contracted agency	SOFRES-ISL	IPSOS-ISL

The fact that the press media took the initiative to develop its own readership measurement was a major impetus to the survey.

Nevertheless the former problems have not all been resolved. The relationship with users-advertisers, advertising agencies and media buying agencies remains fragile. It is currently impossible to predict under which conditions the survey might be further developed or improved. The following example, reveals these difficulties.

In response to the AEPM's invitation to bid, IPSOS proposed a major technological improvement via the introduction of CAPI, (computer aided personal interviewing system) a system already adopted by the NRS in the UK. IPSOS France belongs to the same Group as RSL which does this survey in the UK. It was thus clear that both IPSOS and the French press would benefit greatly from the experience gained in the UK. For several reasons, the AEPM is not presently considering this proposal, and we still do not know when and how this technology might be tested and introduced into the general survey.

'L' EUROPQN' AND 'LE SPQR'

The development of the daily press has shown a similar pattern to that already mentioned for the weekly/monthly magazines.

L'EUROPQN is a complicated term referring to the association for the promotion of the Parisian edited daily press. It is traditionally referred to as the National Daily Press (Presse Quotidienne Nationale).

The SPQR is the trade union of the regional daily press. As far as its advertising revenue is concerned, it thrives on its local income and also on the 15% of its sales from campaigns sold to national advertisers.

Both these organisations, the national association and the regional union, have received the data they consider necessary to strengthen their resources to face the other media.

It is from their agreement that a new survey was born. This was created on the 15th February 1993 and IPSOS has been commissioned to carry it out.

Below is a comparative table, which shows up the differences between the former survey conducted by the CESP and the new magazine readership survey and at the same time shows the magazine readership measurement.

**FORMER/NEW NATIONAL
DAILY READERSHIP SURVEY**

	Former (until Nov '92)	New (from 15/02/93)
Sample		
- definition	quotas	quotas
- size	15,000	20,000 + 15,000 (local sample boosts) + 5,000 executive sample boosts FCA/IPSOS
Methodology	face-to-face in-home	telephone in-home
Data collection	5 waves/year	Continuous 2 waves 3 months each (including Sundays and public holidays)
Questionnaire	12 months reading readership frequency previous readership	12 months reading readership frequency previous readership handling occasions previous day's readership consumption habits
Research Project Manager	CESP	EUROPQN/SPQR
Sub-contract agency	SOFRES/ISL	IPSOS

Some Questions

As far as the Press is concerned, whether it be daily or magazine, radical changes have taken place this year in France. The new situation gives more freedom to all parties concerned. However, many questions still remain to be answered in the years to come. For example:

- The new system is a heavier financial burden for the media. At present with the slump in advertising which has diminished the resources of the various media, they will need to persevere in their commercial efforts so as to be able to finance these new research endeavours, year after year, and to promote and extend their usage.
- The distance separating the media from the end-user has grown. The latter were previously represented directly in CESP, which produced the data and which they partly financed. Nowadays they are only consulted through "user committees", it is important to ask whether this is enough?
- The CESP, the organisation through which the whole profession is associated will be looking for its new role. It controls research quality; this is necessary but insufficient. It needs to find more energy, expertise and money, to conduct new research and to be more than just a discussion forum with little commitment.
- The research companies were, as recently as one year ago, cornered into a passive role as suppliers of research in the definition of which they had no participation. Their responsibilities have now been greatly extended. They now have a role to play in the conception of the research. They have now become true project managers. They will thus be faced with more intensive and more demanding competition.

As for IPSOS in France and our companies elsewhere in Europe, we are both ready and interested in taking up this challenge.

