EUROPEAN READERSHIP DATA: HARMONY OR CHAOS?

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This paper examines the extent to which national readership surveys in Europe are compatible.

The reasons why we might expect compatible surveys are outlined, followed by an examination of the differences in national practices, both in terms of readership and marketing data. The reasons behind the differences are then discussed, and the process of change examined. My observations are made from the viewpoint of an international researcher, whose role is to provide compatible data across a number of countries both in Europe and Asia.

For the purposes of this paper Europe includes all 12 EC member states, plus the EFTA members (Austria, Finland, Norway, Sweden, Switzerland) ie. what used to be referred to as Western Europe, plus our 'new' central European neighbours the Czech Republic, Hungary and Poland. In total these 20 countries have a population of 430 million. In 1990 the combined Gross Domestic Product of the six largest European countries was roughly equivalent to that of the USA.

Why should our surveys be compatible?

There are two main reasons why data in different countries should be compatible, the first is practical and the second intellectual. These two reasons are examined below, followed by evidence of users demands for compatible data.

Practical reasons for compatibility

During the past decade an increasing number of manufacturing and service companies have consolidated their production processes, centralising operations in one country from which a number of other countries are serviced. With the production facility centralised, a logical step is to centralise marketing and other functions. Whilst the former can result in cost savings, the latter also increases the level of centralised strategic and profit responsibility. For television advertising, and to a lesser extent print, it can also reduce advertising production costs. At a practical level this might mean that a common pack design is used across Europe, and the product's advertising has a common theme (but not necessarily execution) across countries. At a strategic level decisions as to which medium is used (eg print vs television) will be taken at the regional European head office, perhaps with guidelines set according to media type (eg. business press vs regional newspapers etc), with varying levels of involvement of the national subsidiaries in these decisions.

Detailed planning is then left to national companies. Whilst this obviously takes advantage of local knowledge, it is probably necessary anyway given the varying levels of access to national surveys and their lack of compatability (as we shall see).

This increased level of accountability at a regional European level means that compatible data is required by advertisers and advertising agencies on which to base cross country decisions. This is the essence of the practical need for harmonisation.

There are few statistics available to gauge the extent to which marketing management is centralised. Those who attended the Barcelona symposium, will be aware from Roger Godbeer's paper that companies such as Colgate Palmolive do manage their marketing communications on a global basis. In the UK, nearly two thirds of the expenditure made by the 100 largest advertisers was by subsidiaries of multinationals, or British companies who themselves operated internationally. These multinational companies spent an estimated $1.7 billion on advertising in 1991 in the UK. RSL's own marketing clients are also looking for compatible data across a number of countries, although in many cases marketing and research are centralised for a small number of countries, rather than Europe wide. Finally the advertising agencies themselves have established structures and responsibilities to cater for multinational clients. Indeed, in Barcelona, Roger Godbeer was supported by Judy Thomas of DMB & B in the call for harmonised European data.

In summary, a significant minority of companies do manage their marketing centrally, across a number of national boundaries. This number has grown in recent years (encouraged by improvements in EC legislation), a trend which is likely to continue.

Intellectual reasons for compatibility

One of the principles behind these Symposia is that we might 'improve our current practices by reviewing the lessons of the past and experiences in other countries'. Five Symposia have generated an enormous amount of debate, exchange and learning.

Given that we are all, theoretically, dealing with the same problems - the measurement of exposure to print media - might we not expect some common solutions to emerge after 12 years of the Symposia? Indeed, if research were a pure science (rather than an applied social science) perhaps we would expect common rules and solutions to emerge anyway.

In science, the chaos theory states that without a harmonising force chaos will prevail. Without a motivating or driving force, we should not expect the paths of historically divergent research practices to converge. In Europe national readership practices have, in the main part, developed separately in each country. Interestingly in Asia, this is not the case. There the Survey Research Group has established national readership surveys in many countries, implementing common practices across countries of seemingly greater diversity than those in Europe.

Agency demands

To encourage convergence the European Advertising Agencies' Association (EAAA) produced a policy paper 'One Europe - One Media Currency' in May 1991. The EAAA represents 24 of the major advertising agencies across Europe. The paper examined the objectives and steps needed to harmonise media audience measurement systems in Europe, and covered television as well as print media research.

Whilst both areas drew criticism, TV research faired slightly better than print:

On the positive side:

- meter panels have been installed in most countries (in some cases replacing diaries)

- because of the high cost of developing meters, technologies developed in one country have been 'exported' to other countries (resulting in a level of 'economic' harmonisation).

However:

- two basic definitions of viewing still exist ('watching' and 'in the room')

- different 'persistence levels' are used to define how many seconds an individual must watch before being counted as a viewer.

- demographic and marketing definitions vary.

On the press media research front a measure of frustration might be detected in the following note in the policy document:

> 'Reports from the 1991 Worldwide Readership Symposium indicate that widespread variation among national methodologies is as true now as it was ten years ago when the Symposia were inaugurated'.

On a more practical basis, the document establishes a number of basic requirements, relating to:
    universe definition
    demographic classifications
    definition of average issue readership
    reporting norms
    time periods for collection and reporting of data

Some of these requirements were also outlined in Judy Thomas' paper in Barcelona, including the call for standard demographics, starting with adults and housewives, and a reference to standards of quality control on sample recruitment and on sampling methodology.

National practices

Having established why we might expect practices to be compatible, I will now examine the actual practices employed in Europe.

Given that fuller details are provided in Erhard Meiers' summary of readership research practices, and the fact that plenty of evidence surrounds us in the discussions and papers taking place at this symposium, I will only provide some highlights of the different national practices. These are given in terms of basic methodologies and sample method, readership measures and marketing data. As far as possible the latest practices have been obtained, although in France the methodology of the two surveys were being finalised at the time of writing.

Where possible each area has been examined for the six major European countries referred to by the EAAA: France, Germany, Great Britain, Italy, Netherlands, Spain.

Interview method and sampling

As can be seen from the table below, most surveys use a personal interview method, and most use a random sampling technique of some form or other.

		Interview method	Sampling method
France	- dailies	telephone	quota
	- periodicals	personal	quota
Germany (MA)		personal	random - address list
Great Britain (NRS)		personal	random - address list
Italy (Audipress)		personal	random (preselected)
Netherlands (SummoScanner)		telephone	random digit dialing
Spain (EGM)		personal	random route

In France quota sampling is used for the vast majority of research, helped by the availability of some detailed and up-to-date INSEE national statistics.

The precise methods of random sampling vary. In Germany a random starter address is issued from a master sample, and interviewers generate a list of housholds by observation using a random route. In Great Britain a representative sample of addresses is drawn from the Postcode Address File (PAF). In both of these countries the interviewer then has to generate a list of household members, prior to selecting an individual for interview.

In Italy the electoral register is used, to generate a sample of indivduals. This method was previously used in Great Britain, with special procedures for those under the voting age of 18, and those who were ineligible to vote for other reasons or had moved address.

Universe definition

The most popular universe definition is adults 14+, with the Netherlands including 13 year olds and Great Britain starting at 15. Care needs to be taken to ascertain how and if foreign nationals are included.

Readership measures

Turning to the average issue readership measure, the source from which this measure is generated is shown in the table below.

France	Direct from recency
Germany	Tree analysis segmentation of recency claims
Great Britain	Direct from recency
Italy - dailies	Last 7 days estimate adjusted according to number of days read
- periodicals	Direct from recency
Netherlands	FRY
Spain	Direct from recency

Whilst the 'direct from recency' method is the most commonly used measure, it is modified in Germany, and in Italy for daily newspapers. The 'first read yesterday' approach used in the Netherlands has been well documented at previous Symposia and other forums.

In terms of title prompts, filter questions, frequency questions, rotations and question order, we also see variations across the six countries. These are fully documented in Erhard Meier's summary of current readership research, up-dated for the San Francisco Symposium. The level of differences mean that no two countries' methods can be said to be compatible.

Marketing and demographic data

The area of marketing and demographic data is the one with least compatability, despite the fact that this can have as much impact on the relevance of the results to an advertiser as the actual readership data. In comparison to the basic readership techniques there has been relatively little discussion of the marketing data at the Symposia. If we were to take marketing data as indicative of the natural state of 'chaos' across Europe, perhaps we should be proud of the extent to which we have reached harmonisation in the area of readership measurement.

The following table shows the classification used for main shopper, one of the few variables collected on all six countries.

	Definition of main shopper
France	in charge of everyday household shopping, such as groceries and household products
Germany	buy groceries or drink for your household
Italy	the person responsible for household shopping
Netherlands	personally buy the groceries/do the shopping for meat or vegetables
UK	personally select about half or more of the household's food and groceries.

In the majority of cases a single person would qualify per household, except in Germany and the Netherlands where more than one might qualify. In most cases the definition relates to shopping for food (and drink) although in France household products (such as cleaning fluid) are also included. Whilst there is a degree of compatibility, no two definitions are precisely the same.

The way in which items are investigated varies from country to country, as does the range of items covered. These variations apply to such simple items as gardens, PC's, cars, CD's and microwave ovens.

The extent of variation between marketing data is well illustrated by the area of music and videos, included in Germany, Great Britain and Spain. The table below shows the definitions used:

Germany:	frequency watch videos frequency listen to CD's/cassettes/records (6 point frequency scale ranging from 'daily/almost daily' to 'never/as good as never')
Great Britain:	spent at least £20 in the past 12 months on: blank videotapes bought or hired videotapes records, cassettes, CD's
Spain:	bought in the last 3 months blank videotapes bought or hired videotapes records, cassettes, CD's

Here the definition varies according to timescale, definition of activity and the actual items.

To demonstrate the effect of different definitions we have calculated readership results from the same survey but using two different income definitions. The following ranking of quality daily newspapers uses British NRS data showing the standard net income of the chief wage earner and the projected household disposable income. Whilst the former is collected on the questionnaire, the latter is not asked but projected from the available data and takes into account items such as household size and mortgage expenditure.

AIR of quality dailies amongst adults in top income households
defined as:

	Income of chief wage earner £28,170+	Projected disposable net household income £22,530+
Unweighted sample	1391	892
Est. population ('000)	1338	1000
The Daily Telegraph	19%	16%
Financial Times	13%	8%
The Times	13%	8%
The Independent	10%	10%
The Guardian	7%	9%

Source: NRS 1992

The projected definition in the right column shows a significantly different readership level for most of the publications. Compared with the standard definition in the left column, this would have an effect on the media selected.

The Future

We can see therefore that national practices vary. However it is also worth recognising that the drive for compatibility is growing both as the exchange of knowledge increases and multinational advertising grows in importance.

Another way of examining this problem is to look at the process of change. This is best illustrated by the UK and France which have both undergone significant changes in the last two years. In the UK the survey was put out to tender; RSL retained the contract and numerous methodological changes were introduced including a new sampling procedure and CAPI (Computer Aided Personal Interviewing) and consequently a new question order and design. In France publishers withdrew support from the old survey organised by CESP, and established two new surveys, funded by daily newspapers and periodicals respectively.

In considering the pace at which change might occur it is worth documenting the timescale involved in these two countries. From the point at which the survey was put out to tender, to when the first 3 months results were made available took 12 months in Great Britain (including a pilot) and 7 months for the daily newspaper survey in France.

Whilst these are relatively short periods, they do not include the time taken to develop the specification, or for the discussion of issues which generated the need for change. These would roughly double the timescales quoted.

These discussions revolved mainly around national concerns, although examination of the two cases shows some interesting similarities:

- in both cases there was dissatisfaction with the organising bodies (JICNARS and CESP). In Great Britain JICNARS was effectively disbanded and a new organising body, NRS Ltd, set up. In France the daily newspapers withdrew their support from CESP and funded their own survey.

- the possibility of conducting their own survey was also considered by the daily newspapers in Britain, although in the end this did not happen.

Another facet which might have aided international compatibility was RSL's own role as consultants to IPSOS in preparing tenders for the two French surveys. This included, for example, the option of CAPI chosen in Britain. The final result, however in France has been a step backwards in terms of compatability with the movement to two surveys instead of one, and the use of telephone interviewing for the newspaper survey to provide a lower cost solution for that media group.

In Britain, as covered in Erhard Meier and Steven Finch's paper, CAPI was introduced to give greater control, allow the introduction of more qualitative questions and increase the speed of reporting. The latter responded to pressures felt both in Britain and other European countries where reporting is significantly slower.

In terms of marketing data the British NRS did move from defining social grade based on the principally male head of household to chief wage earner. The latter definition is not only more consistent with other European countries, but also more practical in the field.

Finally the ESOMAR socio-economic classifications have been considered by NRS Ltd in Britain in terms of their costs but have not been included to date. These questions are included in France.

In conclusion, whilst some attention is given to international comparability, national readership surveys' organising bodies are most likely to be concerned with reaching solutions to their own national problems. This is likely to remain so, so long as the majority of advertising is planned nationally.

Why the lack of compatibility

As discussed in my paper at the last Symposium, we might expect some differences in national research practices due to different national conditions in terms of:

> advertising expenditure
> media availability and consumption
> cost of different research techniques
> quality of national census data
> technological developments

Although these factors might help explain, for example, the use of telephone method in a smaller market, they do not explain the detailed differences observed above. Whilst Neil Shepherd-Smith referred to the linguistical problems encountered in cross-border research, my own view from working across 17 countries in Europe is that such problems are an entertaining diversion in comparison to the real differences in the chosen methodology.

In the area of marketing classifications, as referred to earlier, ESOMAR have devised a standard European system. The length of time taken to achieve this is perhaps indicative of the difficulties faced by the harmonisers. So, how can progress be achieved?

How can greater compatibility be achieved

The EAAA policy document is a clear statement of the advertising agencies' requirements at an international level. This direction has to be balanced against the agencies' day to day requirements, where the bulk of planning is still national. So long as multinational accounts are in the minority, the case for harmonisation will be difficult. On the positive side, the growth of such accounts is likely to continue and this will increase the drive for harmonised data? The practical priorities in terms of costs and benefits need to be ascertained.

Another important factor is the understanding promoted by forums such as the worldwide readership symposium. But this understanding needs to be translated into priorities - is it more important for all countries to use the same (personal?) interview method, or is it more important to harmonise classification data. The practical priorities in terms of costs and benefits need to be ascertained.

Perhaps the ambitions of harmonisers need to be downgraded. The ESOMAR demographic system is a case in point; we could no doubt reach a fairly standard coding of manual/non-manual occupations using existing data. Indeed by examining the current similarities between national solutions, as we have seen, we may find that we are closer to harmony than we originally thought. However, changes are still required.

The forums through which this drive for change is channelled must also be considered. Whilst the EAAA clearly gives 'international clout' to the demand for harmonisation, it is not clear whether this is supported by the national advertising associations, where they are represented on the survey organising committees. EMRO, ESOMAR, and WFA are also active in this area; perhaps we need to harmonise the harmonisers.

Conclusion

In conclusion, there is a growing need for harmonised data. The existing surveys can only partially satisfy this, although, whilst the methods employed do vary, common practices have emerged. The move towards harmonisation can only be helped by the debates entered into at these Symposia, but those in favour of harmonisation need to focus their efforts. Given the level of progress to date, it is likely that harmonisation of national surveys will be slow, but it will start to happen.