

CHANGING ALMOST EVERYTHING IN THE NEW CIM PRESS SURVEY... AND OBSERVING "ANOTHER BELGIUM"

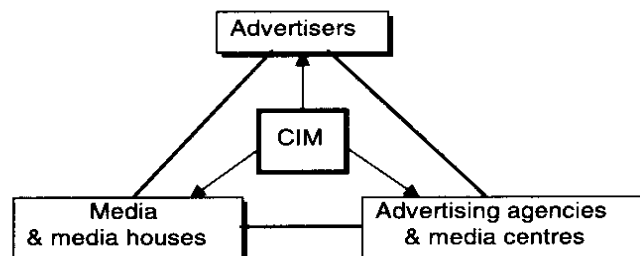
Francis Van den Haute, CIM

The Topic, in a nutshell...

The intention is to tell the story of the profound changes introduced in the new CIM PRESS survey published in Belgium in November 1996. What changed and why. What was the influence on the results. What kind of reactions from the market did we have to cope with. How we did manage the "political" side.

The CIM

The CIM is the tripartite organisation whose mission is to supply the Belgian advertising and media market with quantitative data about media accessible to Belgian advertisers at Belgian tariffs.

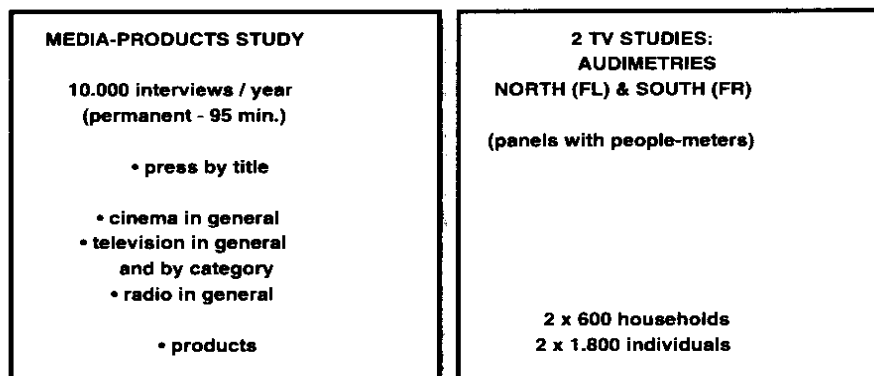


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Since its foundation in 1971, the CIM runs two activities usually separated in other countries: the press circulation audit (ABC) and the basic syndicated audience surveys for all media. Every CIM survey is managed in co-operation between a Technical Committee and the Permanent Bureau.

The past

For many years, the situation has been quite simple since the CIM has been running two independent surveys:



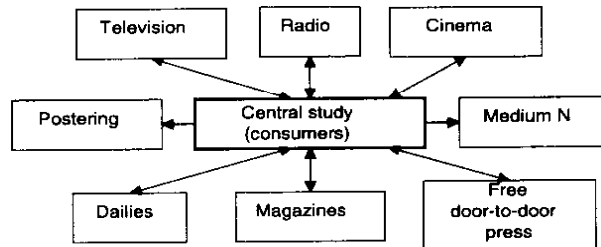
Sch. 2

The first survey was a combination of questions about the press, about multimedia behaviour and products purchase and consumption, run on a permanent basis with an annual publishing of results. The second one, called Audimétrie, was a classical TV panel survey.

The present

The dream of a new philosophy

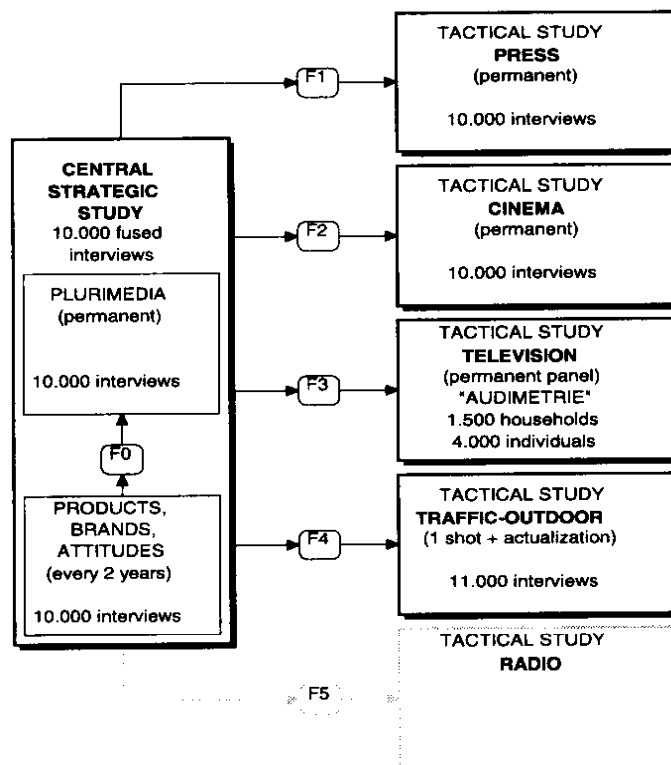
In 1991, a group of people, gathered in a strategical Committee, had a dream: they wanted to offer to the Belgian advertising and media people an actual network of audience surveys in order to encourage them to be more creative and personal in their method of media-planning. This network would be structured around a central strategic survey centred on consumer behaviours, linked, by fusion of data, with tactical surveys specific to one single medium.



Sch. 3

The dream getting reality

After 5 years of hard work inside the CIM, the combination of surveys is now (almost...) a reality, the press survey being one of them. It is expressed by the following scheme we call "the spider" since, looked at horizontally, it has a large body and multiple legs.



Sch. 4

The results of those new surveys have been or will be issued at the end of 1996 and in 1997. The only nightmare inside the dream was the radio survey since we did not succeed, after 5 years of discussions, to get the operators agreeing on a single method.

Changing the methods

For more than 30 years, the CIM and its predecessor gave priority to continuity. That means that the changes in methods were seldom and restricted.

Deciding to go for change, we took the opportunity to adapt our methods in two directions:

- the harmonisation of the basic techniques of all surveys in order to make the fusion possible and of the best quality;
- the improvement of each individual method, taking into account our experience and observations from abroad.

Methodological changes

Harmonisation of the methods

Sampling: from quotas to random

For many years, the CIM used a random technique based on the electoral lists of the population: the interviewers got the name and the address of the persons to interview. In 1990, the government decided to cut the access to that data bank to private entities. That is why, that year, the CIM had to switch rapidly to a quota method. So the interviewers got quotas on 3 variables: geographical spreading, sex and age. There was no quota on the profession.

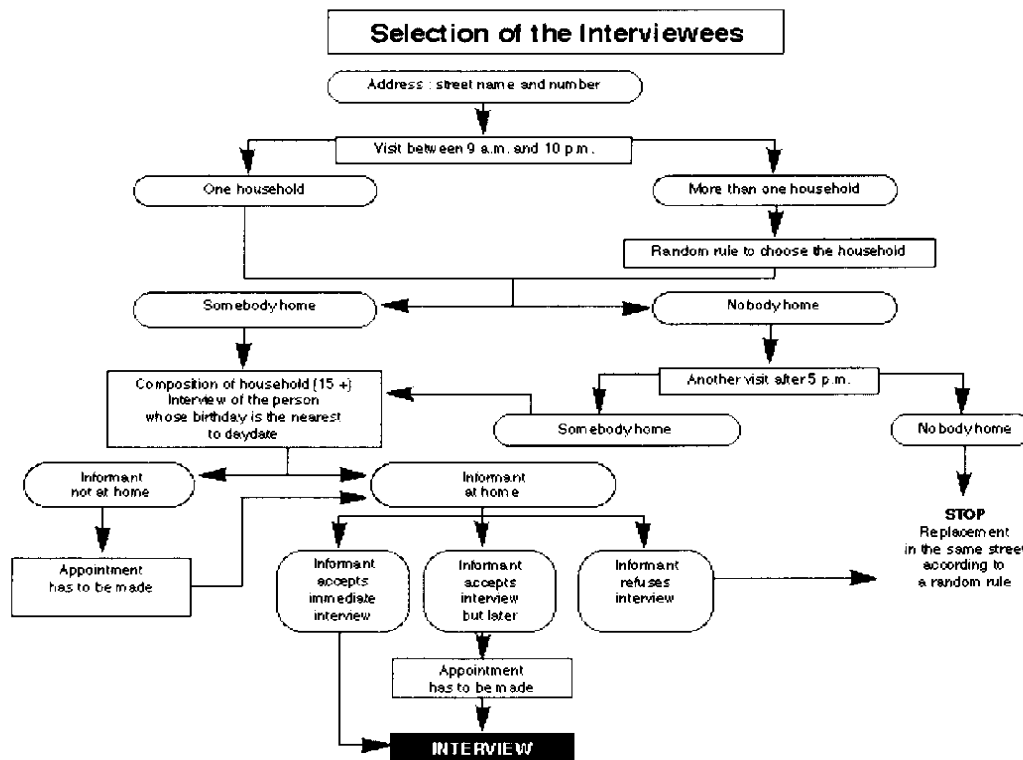
The implementation of this method however was not satisfying since, although it allowed us to master the a-priori variables, biases could still occur on all the other variables. That is why the CIM decided to get back to a random sampling method we call the "random chain". The chain is the following:

- random choice of "statistic areas" (cf. our National Institute for Statistics), of streets and a number in the street: this is the information given to the interviewer;
- selection of a household by the interviewer;
- selection of a person to interview, using the birthday method.

In case of absence at the address, the interviewer is compelled to make a second visit between 17 and 22 p.m. They are allowed to fix a date with the person to be interviewed.

When an address is unproductive, the interviewer may replace it following a random route rule.

The following flow chart is a synthesis of the rules the interviewers have to follow to select an interviewee.



Sch. 5

One can imagine the consequence of that change which is obviously the main one with most influence on the results. We now have much less people directly accessible during the day, like housewives, craftsmen and shop keepers and much more people who are usually out to work during the day. The consequence is an upgrading of our universe: more better educated people, more executives, ... Subsequently it means that the popular press would suffer more due to this fundamental change.

The fact that we got a better representativity was expressed by Michael Brown — who came in the game as a consultant — in a striking way: “Previously, with the quota method, you observed a third of the Belgians; now, with your random method, you observe two thirds.”

Interviews: from “paper and pen” to CAPI

In all the new fieldworks, the interviewers used a CAPI system. The reasons to switch from “pen and paper” were the following:

- a better quality of interview since the computer masters the progress of the questionnaire and lessens the interviewer factor in data collection;
- a better way to control the work of the interviewers, CAPI including a “horodatage” system;
- the transmission of the collected data is quicker and safer: the interviewer sends them by modem almost every day;
- the data being collected directly in a computerised form, there is no more coding step which used to be an important source of human errors.

Same socio-demographic questions

In all surveys, the set of questions about socio-demographic variables and their answering modalities has been unified.

Common fusion questions

Fusion questions have been selected in a specific process taking into account their potential to discriminate. The set of ± 35 fusion questions is split into three categories:

- socio-demographic questions;
- media questions;
- product questions.

That set was injected in all our surveys.

Same weighting system

Despite the rigor of our random sampling method, the reality of the fieldwork leads us to a quasi-random sample which needs to be weighted on basic variables for which we have a reference breakdown of values. So we weight on region, sex, age and profession.

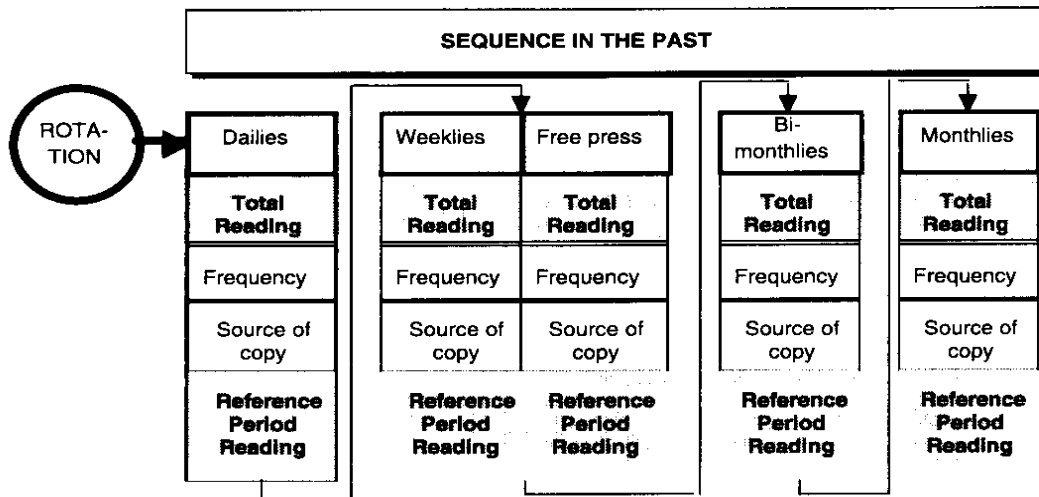
Same control routine by the CIM

The Permanent Bureau of the CIM invented the RIVE process which is a computerised routine for controlling the data resulting from the fieldworks. For a selection of variables relative to the interviewers, the interviewees and the modalities of interview, there can be some variation against the average; when the variation overruns the accepted limits, we go in-depth and dig out the origin of the phenomenon. Sometimes there is a fair explanation, sometimes it is a mistake: and in this case, either we ask the survey company to correct it or we drop the interview.

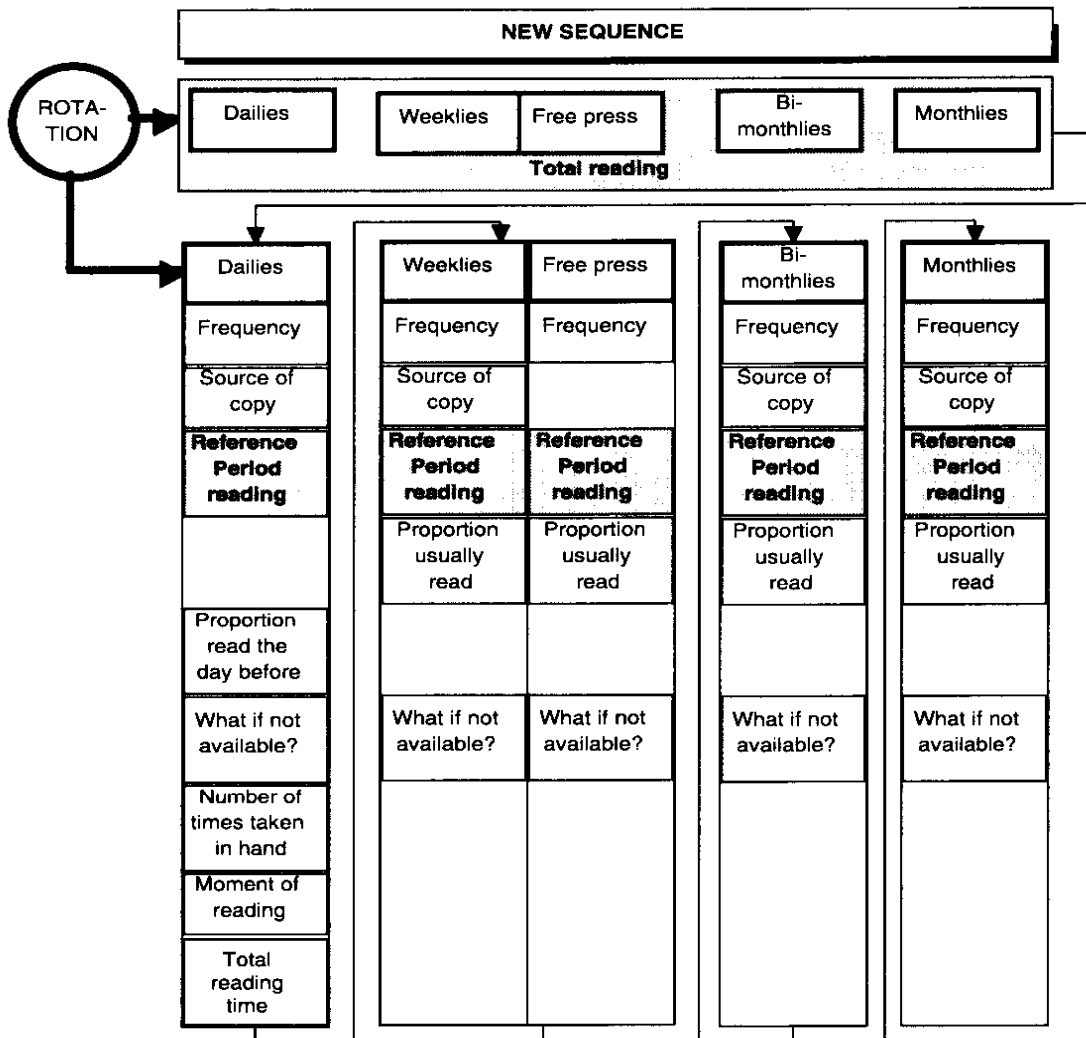
Improvements specific to the press survey

Order of questions

In order to avoid the fatigue effect of the interviewer, the Total Readership question for all categories of press has been put at the beginning of the question list, which is illustrated by the two following schemes.



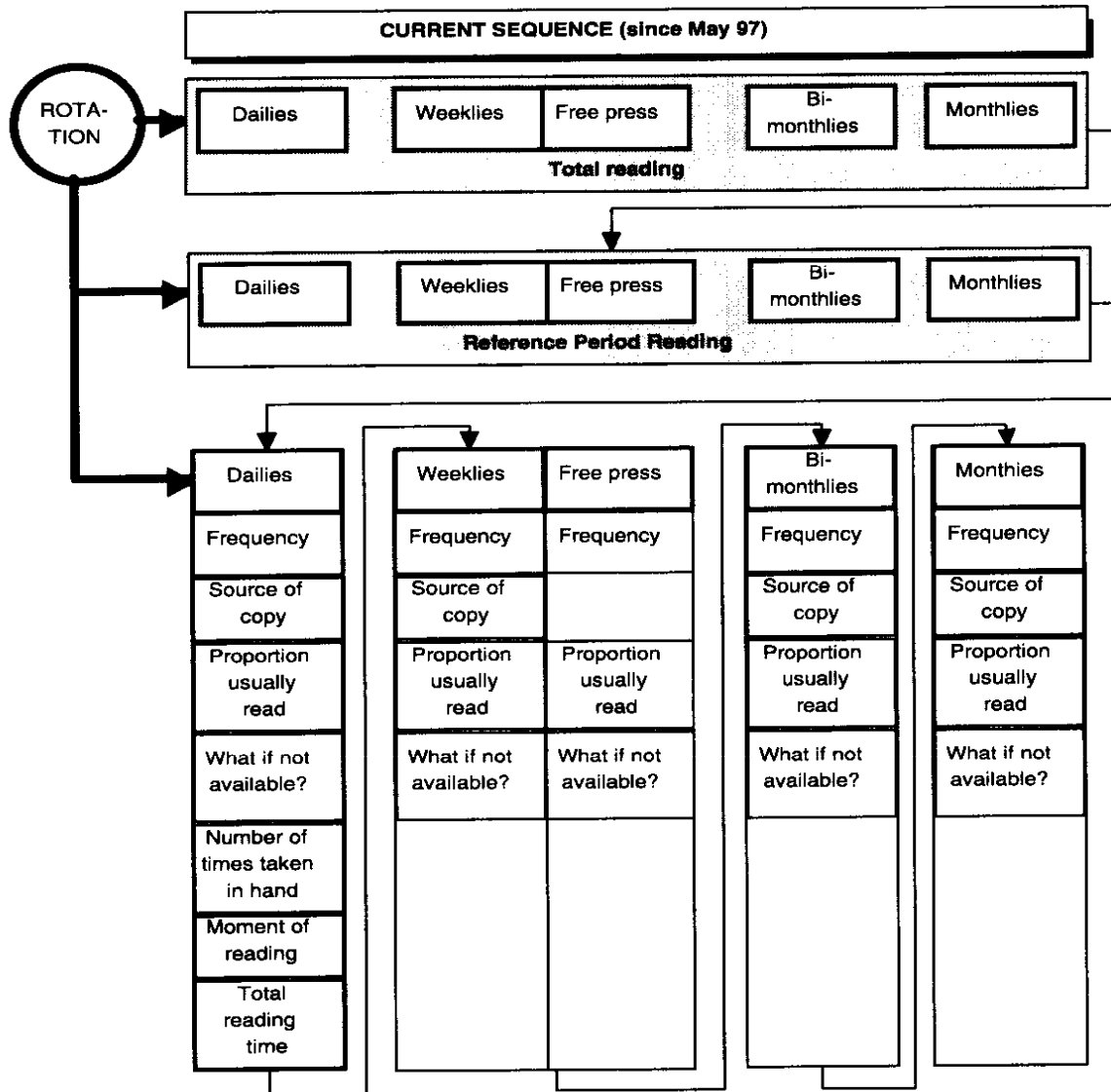
Sch. 6



Sch. 7

When considering the consequences of that change, we got the impression that we had been right in doing so but that there was some incoherence between the Total Reading and the Last Period Reading, some people answering positively to the first and negatively to the second. That incoherence seemed to be due to the distance in time between the two questions. So we did an actual size test during the 96-97 fieldwork in the form of a "split-run" on two halves of the sample. The first half was

interviewed with the sequence of scheme 7 and the second half with the one of the following scheme 8 where the Last Period Reading question was treated like the Total Reading just after it.



Sch. 8

It was eventually decided to use that last sequence and it was implemented in the fieldworks in May 97.

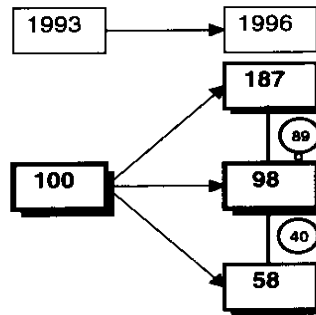
Additional questions

Some questions have been added in the question list, mainly in the dailies part, as one can see in the previous schemes. The intention was to get a better characterisation of the reading behaviour.

The press survey and the changes

The influence on the results

The many changes resulted in a press survey of better quality and with a better representativity. But, as we had expected, we observed ruptures in the results when comparing with the previous survey, these ruptures being erratic and very accentuated for some titles, particularly for the dailies. All titles and all periodicities together, the gradient of evolution was high, positively and negatively, as shown by the following scheme:



Sch. 9

Another Belgium

It is obvious that in reality there were no such great jumps and falls in the readership of our titles: the point was that we observed the readership in another way and that is why we say we observed “another Belgium” reading the same press. So the world around our newspapers and magazines had changed.

It was impossible to make the distinction between the part of reality and the part of method changes in the ruptures.

Modifications of the structure of the reference universe

The evolution is not that sensible as far as age and family are concerned. Two increases are noticeable: that of the “35-54” category (+4,4 %) and that of households with children (+5,9 %).

On the contrary, all variables linked with the social level of the interviewees and their family have been greatly influenced in the direction of an up-grading of the universe. It is quite spectacular in terms of instruction level.

	93-94	95-96	sign. _
Total (x 1.000) Basis 100%	8.167,4	8.303,7	+136,3 +1,7 %
INSTRUCTION LEVEL			
primary	20,7	18,6	-
technical / low	9,8	8,4	-
technical / high	12,5	8,7	-
secondary / low	20,5	15,9	-
secondary / high	17,8	21,8	+ 22,5 %
university & high school	18,7	25,8	+ 38,0 %

Tab. 1

When looking at the following table, one can notice that we have reached more people usually working out of the home.

	93-94	95-96	sign. _
Total (x 1.000) Basis 100%	8.167,4	8.303,7	+136,3 +1,7 %
PROFESSION			
full time / external	35,9	35,8	
part time / external	4,1	6,9	+ 68,3 %
full time / at home	4,7	2,6	- 44,8 %
part time / at home	0,3	0,3	
no profession	55	54,4	

Tab. 2

Going into the details of professions, the up-grading of the universe becomes obvious. On the contrary, we see the drop in the “craftsman - shopkeeper” category which used to be over represented since they are easy to interview being easily accessible during the day.

	93-94	95-96	sign. _
Total (x 1.000)	8.167,4	8.303,7	+136,3
Basis 100%			+1,7 %
PROFESSION I.P.			
management	3,3	3,5	
executive	1,9	4,8	+ 152,6 %
craftsman - shopkeeper	8,1	4	- 50 %
employee	18,7	19,9	+ 6,4 %
farmer	0,7	0,5	
worker / skilled	6,1	9	+ 47,5 %
worker / unskilled	6,2	4	-
student	10,4	10,4	
retired	18	20,9	+
housewife	19	12,2	-
unemployed	6	7,9	+
others	1,6	2,9	

Tab. 3

Evolution of audiences

When indexing titles common to two successive fieldworks (96 versus 93), we see a general trend of increase in the Total Readership which seems to be mainly due to the fact that we positioned the TR question at the start of the question list for all media.

As far as the Last Period Readership is concerned, we see a general stability. But, by category, the evolution is quite different. The LPR of the newspapers is dropping severely with 15 % and that of the weeklies with 6 % . The free press and even more so the monthlies are the "big winners" of the changes.

Index 96/93	TR	LPR
All categories	108	98
Dailies (15)	110	85
Weeklies (35)	104	94
Monthlies (33)	113	112
Free press (11)	114	106

Tab. 4

Actually, we think that, because of our universe being up-graded, we have observed more people who read more titles but who are irregular readers. That phenomenon has obviously more effect on the daily press because of its short reference period. A comparison between audience and circulation figures confirms that trend.

Index 96/93	LPR	Circulation	No. readers / issue
Dailies (15)	85	98	87
Weeklies (30)	94	98	95
Monthlies (23)	112	95	116

Tab. 5

Market shares

What seemed important to us was to be able to verify that despite those ruptures the respective position of the titles in the rankings had been preserved. One can see in the following tables, showing three important press categories, that in almost all cases this was true. So all our changes did not hide the reality of the media landscape, the rises and the falls as well as the emergence of new titles.

Dailies

M. sh. %	93-94	95-96	M. sh. %	93-94	95-96
FL			FR		
KDS	31	32	SOIR	23	24
HLN	25	23	GVA	20	19
GAVA	15	15	MLW	16	15
VOLK	13	12	NGAZ	15	15
BVL	10	10	DH	12	12
MORG	4	5	LLB	8	10
FET	3	3	GNE	4	4
			ECHO	2	2

FL = Flemish FR = French

Tab. 6

TV magazines

M. sh. %	93-94	95-96	M. sh. %	93-94	95-96
FL			FR		
DAG	31	31	CINE TELE	39	42
HUMO	24	26	TELESTAR	27	20
TV STORY	18	15	TÉLÉM	21	19
TEVE BLAD	12	13	TÉLÉPRO	12	16
TV EKPRES	12	9	TÉLÉVISION	/	3
TV FAMILIE	/	4			
TV GIDS	3	3			

Tab. 7

Women's magazines

M. sh. %	93-94	95-96	M. sh. %	93-94	95-96
FL			FR		
LIBRDV	22	21	TOP SAN	20	22
FLAIR NL	21	15	FDAU	19	21
FIT	10	11	Gael	13	10
GOED GEV	5	10	FLAIR FR	14	9
FEELING	9	10	MAR CL FR	10	9
ELGA	10	9	D SANTE	4	5
KREA KEUKEN	5	5	PARENTS	5	5
PROEVEN	/	4	CUIS CREA	4	5
COSMO NL	4	3	1001 DEL	/	4
D GEZ	3	3	ELLE FR	4	3
OULD & KIND	6	3	COSMO FR	2	3
ELLE NL	2	3	MME FIG	4	2
MAR CL NL	4	2	OPTIM FR	/	2
OPTIM NL	/	2			

Tab. 8

Psycho-political aspects

Expecting ruptures in the results

We took a basic and crucial decision: to implement all the changes at the same time in order to get one big influence on the results and to get afterwards a new period of "calm" with comparable results. Indeed our basic philosophy is that we are not a scientific research unit in a university but a central body that supplies all actors on a market place with a currency that allows them to get commercial exchanges. When being cynical, we say that consensus on figures is much more important than the figures themselves.

Inside the CIM, we were aware that we would have to cope with ruptures in the results, but changes in what direction and of what amplitude? Nobody was able to predict this, taking into account the number of changes at the same time. And nobody wanted to look into a crystal ball.

We did not test the changes, on the one hand, because it would have taken too much time to run a test on each isolated change to observe its effect and, on the another hand, because one does not evaluate the pertinence of a change on results and only on results. And, on top of this, we also knew that if Belgian operators were confronted with figures resulting from tests, some of them would get scared for their own performances and that the risk of political blockage would be huge.

So, having put together the experience of all the people involved in the project, having looked into the literature and having observed what was done abroad, we made sure that the different changes we decided were theoretically logical and were going in the direction of an improvement of the methods.

Before the publication

First tempest

In November 1995, six months after the start of the fieldwork, we got a first and valid view (5.000 interviews) on the results and the general trends of the evolution (trends confirmed at the end of the fieldwork). The main observations were:

- the amplitude of the ruptures by title and the facts that some of them were huge;
- the fact that the ruptures were going in all directions for magazines;
- the sectorial decrease of the performances of dailies.

Our Technical Committee Press was confronted with global results and results by type of press, not with results by title! Since it is impossible in an organisation like ours to keep something confidential, the press sector were immediately worried and started shivering: am I one of those who is dropping? And we were confronted with rumours, critics of the study and a real danger of secession by certain publishers. Some people have even been announcing the explosion of the CIM.

We reacted by demonstrating the pertinence of our choices and changes, and we put the emphasis on the excellence of our methods. We explained as well that one does not judge a method on its results but on its pertinence. To achieve that operation of credibilisation, we asked Michael Brown to act as an independent expert. So it was not possible to criticise the study anymore and any secessionist would have appeared as being afraid of having bad figures.

A period rich in discoveries

During that challenging period, we learned a lot when “playing” with the new figures. One of the directions we followed for a while and which is worth mentioning was the search for an alternative indicator to replace our traditional “CIM Reader” which was a Last Period Readership index.

That new indicator should have had the following two characteristics.

- It should integrate the new behaviours of reading we observed in Belgium and in foreign countries, particularly as far as the daily press was concerned. For instance, a growing unfaithfulness vis-à-vis the dailies due, amongst other reasons, to the “periodicallisation” of the dailies through the multiplication of thematic supplements.
- it should attenuate the severity of the “yesterday” reference period of the dailies. We indeed got the feeling that we were observing two different variables identically named “reference period”: behaviour for the dailies since the memorisation of what you have read the day before is quite good, and attitude for magazines since the imprecision of your memory leads you to reflect more a usual behaviour than the actual one... although some media people think that there is a natural trend to inflate what you have lived yesterday because it is more present in your mind.

We abandoned that direction, despite its interest, since it appeared that the alternatives possible based upon the existing questionnaire were too light.

But even if it was a cul-de-sac, it made us aware of weaknesses in calculating our “CIM Reader”. So we reinforced the probabilisation method and to symbolise it, we killed the “CIM Reader” and replaced it by the classical “Last Period Readership”. On top of this, we decided to emphasise not just one readership indicator, but 5 of them:

- Total Readership
- Regular Reader (the highest two frequencies)
- Primary, secondary and tertiary Reader
- Attached Reader (absence)
- Last Period Readership,

in order to encourage media-planners to sophisticate their procedures by taking into account several indicators.

An attempt to attenuate the ruptures

We looked through several methods which could have enabled us to attenuate the amplitude of the ruptures of results. We tried to bring the extremes closer, to equalise results on several years, to apply a coefficient coming from the circulation figures, ... but we gave up rapidly since no method was technically and politically satisfying. We also did not want to give the impression to the market that we were manipulating the figures and risk playing with the credibility of the CIM.

Decision and communication

So, we recommended to the Board of Directors that they should issue the figures as they were, without any tricky manipulation. The Board accepted.

Since that moment, we started running a dense communication scheme towards the market through our own publication, through an actual “road show” in agencies and media centres, interviews to the professional press, ... We explained the methodological changes and their consequences. We put the emphasis on the danger of comparing the new results with those coming from the previous “old style” survey because people could find differences in readership figures when those differences could be due totally or partially to methodological changes. We called the new publication a T0 moment which will be a new standard of comparison with the following issues Tn. And we reassured people of the fact that, after that methodological earthquake, they would have a long period of calm with only minor improvements.

We also went to the Belgian advertisers association and agreed that, when the new results would be issued and for a period afterwards, they would respect a truce in the commercial game of pressuring the price, so that publishers would not suffer the consequences of a drop in figures due to methodological changes.

After publication

A period of serenity

The results were published early November 1996.

On seeing the results, most publishers realised that their concerns were excessive or even unfounded. Some of them whose figures were dropping decided to freeze their tariffs for 1997. But all of them observed for themselves the coherence between the results and the methodological changes. They admitted the excellence of the method. They even gave positive comments in the professional press.

The nice side of life

The positive aspects of that period must also be emphasised. A lot of new ways of thinking have been opened up and we have observed the renewal of interest for research. Publishers and media houses went more in-depth than usual with the new figures — some of them even hired research people for the job. The mentality changed towards results of surveys: previously they got a cosmetic treatment in order to be aesthetic; now most people accept their raspiness due to the imperfection of the methods, even of the best ones. We established a better relationship with the research companies based on the excitement of discovering new ways together.

This is the end of the story of a very delicate period in the history of the CIM and how it was managed in order to defuse that “chronicle of a death foretold”.

