

1.4 Multi-media research in the Netherlands

INTRODUCTION

In the Netherlands there are two major multi-media surveys in use: *National Onderzoek Persmedia*, which will be called *National Readership Survey* (NRS) in the rest of this paper; and *The NIPO (1) Media Survey*, which started in 1962 and has been published every two years since then.

The main differences between the surveys can be found in the fieldwork organisation and the sample sizes on which their publications are based. For the NRS every two years approximately 10,000 interviews are carried out with fieldwork divided in four waves over the year. NIPO carries out 600 interviews per week the whole year through and is therefore able to report on some 30,000 respondents. This makes the NIPO survey especially suitable for smaller media such as the regional newspapers and local free door-to-door papers (of which we have over 450 different ones in Holland). 1977/78 the NIPO Media Survey stopped measuring consumer magazines which had been concentrated in the NRS for a period of ten years by then anyway.

While the NIPO Media Survey has run since 1962, the NRS surveys (which are financed by the publishers) have been carried out six times until now, starting in 1967. Both surveys use oral interviews, and are reported approximately every two years.

The surveys deliver reach figures of the printed media which can be used for media planning purposes, information about cinema visiting, target group information and extra information such as buying habits and ownership patterns. Neither survey supplies reach data on commercial radio or television transmissions: these data have been measured in a separate consumer panel since 1967. For the media planners in the Netherlands this means that evaluation of advertising plans including both press and broadcasting media, has never been possible. They have to work with reach data from various sources in those cases.

Talking about the series of NRS surveys one might conclude that no important changes were introduced during the past five surveys. In the late sixties we opted for a research model – used in most of the countries surrounding us – in which reading behaviour is determined by means of *reading probability calculation*. This system has been applied in the NRS Surveys since 1970.

Important experiments, however, were the fusion (by means of simulation) of two new magazines in two of the four waves of NRS 1977 and the fusion of a com-

pletely new psychographics survey 'Psyche 1978' with NRS 1977 (and just recently with NRS 1979). With the latter survey the use of psychographics (or life style if you like) entered Dutch media planning.

Limitations and criticism

In contrast with the NIPO Survey, which is carried out quietly and peacefully every two years, the NRS Survey in Holland is a continuous subject of discussion amongst the participants (publishers) themselves, as well as by the eventual users of the data – the advertisers and the advertising agencies.

In the user's opinion the research concentrates too much on *media contacts only*, which in itself bears no guarantees for the individual advertiser's message.

A reasonable number of qualitative studies over the past ten years (2) was the publisher's answer to this demand from the market. Consecutively studies were carried out about aspects relating to: the nature of the media (timing, current reach); the nature of the reader (interests, participation, attitudes (imperatives groups)); linkage with media; differences in page exposure; and function and image (editorially very thoroughly investigated in 'Men and their Media 1975').

These studies were hardly applied in media planning however, partly because in most cases they were not designed for this kind of application and partly because they often proved to be not practical enough.

Two new aspects were relegated to the NRS in 1979, aspects which can only partly be called qualitative, namely: 'the copy source' and 'the reading place'.

A later working committee unfortunately did not find proof for the assumption that these two aspects could be seen as indicators for the *quality* of the medium contact. Additionally, at present the participants are doing experimental work, regarding the influence of the filter question in the model.

Another point of continuing discussion refers to alternative ways of collecting the data. Besides oral interviews data could be obtained from a consumer panel (by means of household diaries), which is available in Holland through the Attwood organisation.

In 1978 Attwood presented its own readership survey results to the Dutch market as an alternative to the current NRS. The advantages of a panel as an instrument are legion, if one only thinks of the extra information it can supply, such as buying habits on brand level, etc.

Moreover with panel data it is not necessary to calculate the 'reading probabilities' through segmenta-

1.4 Multi-media research in the Netherlands

tion, because the reading frequency per respondent is measured over time and so panel information delivers 'real' reading probabilities instead of 'calculated' ones.

Still the publishers did not find reason to change to the panel system, mainly because of the deviations the Attwood figures showed in comparison with the NRS reach levels for individual titles. Other arguments for not using consumer panel data for media research are that such panels have not been set up for media purpose in the first instance, but for measuring buying habits, and the extent to which a panel can be seen as representative of a population is uncertain. But later in these Proceedings Coen de Koning, Managing Director of Attwood Statistics in Holland, gives his own arguments in his paper on "The Evidence from Panels".

So far I hope to have given the reader a sound understanding of the Dutch media research scene; some history, some considerations and something of the atmosphere, which can be seen as relevant to the way we have done it up until now.

In the rest of this paper I describe in more detail both of the major multi-media surveys in the Netherlands: The NRS Survey and the NIPO Media Survey.

THE DUTCH NRS SURVEY

The organisation

The NRS Survey in the Netherlands is financed by the publishers of consumer magazines, daily newspapers and the Dutch cinema organisation.

These participants formed the official 'NRS Foundation' in which there is a *board of directors* and a permanent *committee*, whose task it is to advise the board of directors.

The NRS Foundation is responsible for methodological aspects, design and contents of the questionnaire, and execution and analyses of the NRS Survey.

There are two research agencies, which have carried out the fieldwork for the NRS Surveys in the Netherlands during the 70s. They are: The Netherlands Statistics Foundation (NSS) in the Hague, and NIPO in Amsterdam. Each does half of the interviews.

The statistical technical analysis of the data and the production of tables has been put in the hands of Sobemap in Brussels.

Sample design

The sample is designed to be representative of *persons aged 13 years and older, who are living in households*.

Starting point for this 'persons' sample are two identical samples of households, each of equal size and drawn from the National Address Register. In each household from the one sample the head of the family is

interviewed and from the other sample the housewife.

In three-person households from the 'family head sample' one extra person is interviewed. This was also the case in all four-person households in both of the main samples. This 'extra' person can be identified as a person who is not a housewife or family head but 13 years or older.

The addresses in the large and middle-large municipalities are clustered. The cluster size is four. In the smaller municipalities the addresses are not clustered. The interviewers have to make at least three calls per given address. No substitution is allowed.

The aim of NRS 1979

Gathering data on readership of national media in such a way that it links as much as possible with the previous NRS surveys.

Research method

The information for NRS in the Netherlands is collected by means of an oral interview based on a questionnaire.

Fieldwork periods

The fieldwork was carried out in four waves spread over the year: 5 March–7 April 1979; 30 April–2 June 1979; 20 August–22 September 1979; and 29 October–1 December 1979.

Days of the week

In the fieldwork execution the agencies strive as much as possible for an equal spreading of the interviews over the days of the week. Because on Sundays no interviews are done, in the Monday interviews not only the reading behaviour on Sunday, but also that on Saturday is asked. The interval of appearance for daily newspapers in the weekends is two days (we have no Sunday papers). Condition for that agreement is that the number of Monday interviews would not differ too much from the number of interviews held on the other days of the week. In the weighting stage all days became an exact share of 16.7% ($6 \times 16.7 = 100.2$).

Fieldwork results

From the original sample of 11,141 *addresses* successful interviews were made in 8580 cases. This means a response rate of 77%.

Based on *persons* the response rate appeared to be 75%. 10,249 persons should be interviewed at the resulting 8580 visited addresses. 9930 questionnaires could be used for analysis.

The structure of the interview

Having introduced herself and her company the interviewer explains that the interview is about reading and

1.4

Multi-media research in the Netherlands

buying habits. After recording the household composition (needed to decide whether another person has to be interviewed or not) the interview starts with a so-called 'Family questionnaire'. In this part questions are asked about the house, the number of cars, the occupation of the respondent, education, the civil status, and other socio-demographics. (Only the housewife has to answer these questions.) Now she comes to the *readership section* of the questionnaire.

The respondent is handed a booklet containing reproductions of the mastheads of magazines and newspapers covered by the Survey. Each masthead card is 21 cm wide and 15 cm deep. As in the UK it carries a statement of the publication's frequency, eg "Published every week, month or day" and a facsimile of the logo.

In the NRS 1979 five regional versions of this booklet were used, each for one of the following regional areas of the country: North, East, Middle, West and South. They only differ from each other as far as the titles of the regional dailies are concerned. Each of the booklets contains in total about 100 mastheads, of which 70 refer to magazines, 9 to national dailies, and about 20 per booklet to the relevant regional dailies. The sequence of the logos of the magazines and the national dailies in the masthead booklet is the same in all five versions. It starts off with monthly magazines, followed by weekly magazines, national dailies and regional dailies.

The NRS (media) questioning system can be described as a 'funneling' method because the respondent by the sequence of questions is being led from media use in a broad period of time to media use in a limited period of time.

With the masthead booklet in the respondent's hand the interviewer then asks **Q1**: "I want you to go through this booklet and tell me which of these media you *ever read or glance through*, at home or anywhere else, wherever it is?"

When the respondent has gone through all 100 mastheads the booklet is taken back and the respondent gets a card showing the '*reading intensity scale*'. For each of the titles he or she 'ever reads' (according to **Q1**) **Q2** is asked: "Could you tell me by means of this card how you *usually read or glance through* medium X?" The verbal scale on the card reads as follows:

I read medium X <i>usually</i> :	(practically) all the greater part about half a single part hardly
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The reading intensity is seen as a qualitative specification for the individual titles.

The following two questions refer to '*recent read-*

ing' or more specifically the readership in the latest '*interval of appearance*' of the media. **Q3** reads: "Did you read or glance through medium X during the *past seven days* (if it is a weekly)?" **Q4** reads: "Did you read or glance through medium X *yesterday*?"

Q5 refers to the '*reading frequency*' and the respondent again receives a card showing:

"How many out of 12 issues do you <i>usually read or glance through</i> ?"	<i>less than:</i> 1 2 3 : 12
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Table 1 shows a schematic review of the five media questions which are the basis for the Dutch media measurement model.

TABLE 1

The reader is separated from the non-reader by means of a filter question, namely the question whether or not the respondent:

1. "Ever reads or glances through filter question =
the medium" → Total reach

The reader then is asked:

2. "How he (or she) *usually reads or glances through that medium*" → reading intensity

usually reads: ↓
measured through a scale:
-- (practically) all of it
-- the greater half
-- about half
-- a single part
-- hardly

Next is registered whether respondent has read or glanced through the medium during:

3. "The *latest interval of appearance*"
4. "The *day before the interview*"

At last the respondent is asked:

5. "How many out of 12 issues
of that medium he (or she) *usually reads or glances through*" → reading frequency

1.4

Multi-media research in the Netherlands

The interval of appearance for daily newspapers is *one day* for interviews held from Tuesday up to and including Saturday. For the Monday interviews there is an interval of appearance of *two days*, namely Saturday and/or Sunday.

For weeklies the interval of appearance is verbalised in the questionnaire as 'the past seven days' and for monthlies as 'the past four weeks'.

The 'Reading Place' and the 'Copy Source'

New in NRS 1979 were the above mentioned dimensions. They were questioned per 'ever read' medium as follows:

READING PLACE

"One can read printed media at different places, ie at home, with the neighbours, in the waiting room, etc.

The *last time* you read or glanced through medium X where was that? You can give your answer by means of this card. Just tell me the letter that refers to your answer." The card lists the following places:

- (a) At your home.
- (b) On journey.
- (c) At the hairdressers.
- (e) In a hotel, restaurant, café.
- (f) In a waiting room.
- (g) At work, office, school.
- (h) At your parents', other family members', neighbours', friends' or acquaintances' homes.
- (k) In a kiosk, shop, department store or supermarket.
- (l) Somewhere else.

COPY SOURCE

"One can obtain printed media in several ways, ie through subscription, through reading-case, through buying a single copy, etc.

The *last time* that you read or glanced through medium X, how did you obtain it?

You can give your answer by means of this card. Just tell me the letter that refers to your answer." The card reads the following sources:

- (a) From the reading-case.
- (b) A joint subscription with others, who read it *after* me.
- (c) A joint subscription with others, who read it *before* me.
- (e) Subscription by mail.
- (f) Subscription by a deliverer.
- (g) Subscription by a magazine seller (door-to-door).
- (h) Bought from the magazine seller (but no subscription to this medium).
- (k) Bought myself at a kiosk, paper hall, shop, department store or supermarket.
- (l) Bought by someone else in the household.

(m) Received as a present/received free of charge.

(n) Borrowed.

(o) Read somewhere else but not bought.

(p) Otherwise.

The information from these two questions is not used in the segmentation programme for calculating the reading probabilities for each of the media per respondent. The information only serves to enable publishers to compare their media in this respect in order to possibly obtain some extra sales argumentation.

The remaining part of the questionnaire

Having completed the readership section the interview is continued with other media topics such as cinema going and commercial television viewing. Then the interview is finished with a large number of product questions. The majority of these product questions are not NRS Foundation's responsibility, but are designed by the various (paying) participants. The section in which these product questions are asked is called the 'Omnibus' part (the multi-client idea; it is financed by the participants) who use it for their personal analysis purposes.

CINEMA

In order to calculate 'visiting probabilities' for cinema the same questions as used for weeklies are asked, ie "past seven days"; "yesterday", next to frequency over the past 12 months.

COMMERCIAL TV

Commercials (TV spots) in the Netherlands are transmitted in 'blocks' (consisting of eight to ten spots) before and after the news programmes in the evening starting at 20.00 hrs. There are two national channels each transmitting three commercial blocks per evening. On Sundays there are no commercial blocks at all.

Viewing television now is measured: "ever view commercial television blocks"; "yesterday"; and "how many evenings (out of six during the past seven days) one saw television advertising". No 'viewing probabilities' or whatever are calculated from these questions.

Radio listening questions are not included in the Survey, although there is radio advertising in the Netherlands. As stated before with regard to television, radio listenership is measured in a separate panel.

Finally in the Omnibus part the ownership and usership of a range of consumer products and durables is measured, as well as activities. Target group information about smoking, drinking, going out, hobbies, do it yourself activities, shopping (and where), fashion, finance with regard to kind of accounts and cheques, toiletries/cosmetics/shaving, holidays, etc makes the whole of the data base of interest for the publisher's clients - the advertisers and their agencies.

1.4

Multi-media research in the Netherlands

Data treatment

Coding, punching and controlling of the data is carried out by each of the two research agencies under its own responsibility. The 'cleaned' data are delivered on tape to Sobemap for further treatment. This further treatment refers to weighting, calculating the 'reading probabilities' and delivering tapes to participants on which these probabilities are added, so that their tapes are suitable for media planning purposes (ie ranking and plan evaluation).

The segmentation technique for calculating the reading probabilities has been fully described in NRS Publication V *Technical Account, Definitions and Questionnaire*.

Some experimental work with this segmentation approach can be found in ADMEDIA's contribution to the ESOMAR seminar in Baden, November 1980, "Children and young people".

The publications

The NRS in the Netherlands is officially published (by NRS Foundation) in a set of five volumes. These volumes exclusively deal with the readership results of the following population groups: women - men; housewives - family heads. Part V gives a technical account, explains the definitions and supplies the questionnaire.

Some publishers produce their own 'product reports' for their market, consisting of cross tables showing penetration figures of products and durables, etc within the readerships of media.

For special analysis purposes NRS data can be assessed both on and off line via a computer bureau licenced by the NRS Foundation for this purpose. This bureau offers media programmes like a 'ranking', 'evaluation' and a normal crossing programme. Non-participants in the NRS (like advertising agencies and advertisers) have to pay an entrance fee to NRS as well as a royalty per analysis carried out on or off line.

The NRS is carried out every two years and the Survey costs amount to approximately Dfl. 1,000,000 per survey.

THE NIPO MEDIA SURVEY

The organisation

It may be said that NIPO plays quite an important role in Dutch Media Research. As well as being a contractor for half of the fieldwork on behalf of the NRS Foundation, NIPO runs its own Media Survey, which started in 1962. Every two years since then, NIPO has published this survey, based on a larger sample than the NRS could afford. There have been ten NIPO Media Surveys to date.

In contrast to the NRS, the NIPO Survey can be char-

acterised as an agency initiative, based on a multi-client approach. It follows that design and contents of this Survey particularly have been tuned to the needs of their clients (especially the daily newspapers).

Since 1977 NIPO stopped measuring the magazines (in consultation with the NRS) so that the Survey strictly concentrates now on (daily) newspapers and free door-to-door papers. In consultation with the newspaper publishers the methodology was adjusted more to the NRS method than in the years before 1977.

Research method

Oral interviews on starting addresses. Non-response and not at home addresses are substituted. If the person to be interviewed is not at home, the interviewer tries to collect the information through another household member, ie the housewife.

The media interviews take place in NIPO's weekly (multi-client) Omnibus Survey, which has not been set up primarily for media measurements, but for measuring the penetration of goods and services in the consumer market.

Fieldwork period

The fieldwork period covers a whole year from October up to and including September. Most of the interviews are held on Monday; Tuesday is the last fieldwork day per week. This means that readership figures for Dailies mainly refer to the Saturday issues.

About 600 interviews are carried out per week.

Sample design

The sample is based on the Dutch Address Register and refers to *persons living in households*. NIPO works with starting addresses and, next to this address four other addresses have to be contacted. Cluster size amounts therefore to *five*.

In half of the interviews the housewife must be interviewed and in the other half the head of the family. In any case the interviewer has to interview at least one person aged 13 years or older per household.

Sample size

Family heads	14,894
Housewives	14,750
Other persons	6,853
Total	36,497

Fieldwork results

Because NIPO works with a random-walk method and non-response or not at home addresses are substituted, no information about response rates are available.

1.4 Multi-media research in the Netherlands

TABLE 2

NIPO media questions

- (1) 'Ever reads' or glances through the medium
- (2) 'Copy Source'
- (3) 'The latest interval of appearance'
- (4) 'The day before the interview (or Saturday)
- (5) How many out of six issues one usually reads

Differences with NRS

No mastheads
No 'reading intensity'

How many out of 12 issues
No 'reading place'
in NRS Copy Source comes after frequency question (5)

Weighting

No technical weighting is carried out, as is usual with NRS. There is no special treatment for the group of 'other persons', so that this sub-sample strictly cannot be seen as representative, because these persons in larger families have a lower chance of being in the sample than such persons from smaller families.

Normal weighting is, however, carried out with the 'family head' and 'housewife' samples.

The 'other persons' sample gets a weighting based on the number of persons aged 13 years and older, minus the number of family heads and housewives from the previous weighting.

Structure of the interview

As in the NRS, the NIPO Survey has product and media questions and a family questionnaire next to the personal questionnaire. With NIPO also the head of the family is allowed to answer the family questions.

Media questions

Titles

- national and regional dailies (all)
- newspapers (45 out of ± 100)
- free door-to-door papers (250 out of ± 450).

No use is made of mastheads with logos of titles. The titles are listed, typed on A4 sheets, which are handed to the respondent.

Table 2 shows the structure of the media questions. The wording of the questions is the same as in the NRS.

OTHER MEDIA

Television and cinema

Measured in the same way as in the NRS.

Product questions

More or less the same product questions as have been mentioned for NRS are asked in the NIPO Survey.

Extra questions, recently added to NIPO Media at publishers' requests, are the following: reading frequency of editorial items (from politics to recruitment ads); viewing frequency of TV programmes; division of household tasks within the family; and buying decisions within the family (regarding durables).

Data treatment and availability

The calculation of reading probabilities (for media planning purposes) is carried out not by NIPO, but by CEBUCO (Central Bureau for Newspaper Promotion) the most important subscriber to the Survey, on their own computer. Their calculation system is based upon the reading frequency classes, corrected by the readership results over the last interval of appearance.

NIPO publishes reports, which can be bought by any client. The costs of such a report amount to Dfl 12,000.

REFERENCES

- 1 NIPO is the Dutch Gallup Institute.
- 2 See ESOMAR Paper: Berlin Seminar 1980: Media Measurement and Media Choice *Ten years of progress ... or stagnation?*