**John F Meagher**
Irish Marketing Surveys Ltd.
Dublin, Eire.

# 1.1 Comparative methodologies and major changes since New Orleans

## INTRODUCTION

In compiling this paper, I have drawn heavily on Erhard Meier's 'Summary of Current Readership Research'. This, in turn, details responses to his questionnaire which sought information on the thirty-two surveys conducted in the twenty-four countries with which we are concerned.

My paper, in large part, is an aperçu or summary of his work; thus, his report forms a companion piece to this and those seeking more details than are contained in my paper should refer to it.

I should like formally to record my appreciation of the very considerable work Erhard has put in to produce and collate such a great deal of pertinent information.

In earlier discussions when planning this paper, I suggested to Erhard that he widen the scope of his enquiry of two years ago. Hence, we now have information on advertising expenditure and media availability in our twenty-four country universe. We also have some limited data on survey costs in addition to details of how each of the thirty-two practitioners who have reported undertake their respective studies.

By way of a modest disclaimer, I should point out that the accuracy of the data as it relates to the individually reported surveys is a function of just how carefully those who replied to Erhard's questionnaire completed their task. As not everyone replied to each question fully, some inevitable lacunae arise. In (hopefully all) those cases where the data are in some manner deficient, this has been identified; for the most part, there was a very full response and I should like to second Erhard's vote of thanks to all those who have contributed.

In regard to advertising expenditure, media availability and so forth, third party sources have been the database and these may not in all cases be either fully up to data or wholly accurate. The reader is respectfully urged to digest the data with a pinch of commonsense.

Finally, I should also like to thank Professor Harry Henry for his most helpful advice. This ensured that an original thought on how to treat the advertising data be reconsidered with the result that the international comparisons are now very much more meaningful than would have been the case.

Our universe consists of twenty-four countries, seventeen of whom report on one national survey:

Belgium
Brazil
Canada
Denmark
Finland
France
Hong Kong
Indonesia
Ireland
Malaysia
New Zealand
Singapore
South Africa
Spain
Sweden
Switzerland
Thailand

For six countries, we have data on two surveys in each case:

| | |
|---|---|
| Australia | — McNair Anderson and Roy Morgan |
| Germany | — AWA and MA |
| Italy | — ISEGI and ISPI |
| Norway | — MMI and NORSK Medie Indeks |
| UK | — NRS and TGI |
| US | — Mediamark and SMRB |

For one country, we have data on three national surveys:

Netherlands — Market/Media Skanner, NIPO and NOP

## ADVERTISING EXPENDITURE

In order to set the scene, as it were, a summary of advertising expenditure in the twenty-four countries with which we are concerned, seems like a good point from where to start in this comparative review of Readership Research Activity.

A number of disparate sources have been drawn on in collating the advertising expenditure data; these, in turn, relate to differing years. Hence, for some of the countries — about half — the data refers to 1981*; for five, 1980*; in the case of a further five, 1979* and, for the remaining two, 1978*.

* *Erhard Meier's* Summary of Current Readership Research *indicates the provenance of the data used for each of the countries and the year to which it refers.*

# 1.1 Comparative methodologies and major changes since New Orleans

The initial temptation was to convert the advertising expenditure data from local currencies to some common unit — the US dollar being thought of — in order to provide a 'global' figure for our twenty-four nation universe. This would have allowed for an assessment of the 'share' of total advertising accounted for by the individual nations. However, a wiser counsel prevailed (who else but Professor Harry Henry) who preached caution, and rightly so, pointing out the dangers inherent in making international comparisons utilising a yardstick which was so elastic over the five years concerned and so subject to fluctuation as to be meaningless. (Taking the UK/US exchange rates as an example, a UK pound bought $2.04 at the end of 1978; $2.39 in 1980 and $1.91 in 1981). Also, of course, the domestic purchasing power of some national currencies, when expressed as US dollars, could be quite misleading (for example, a million US dollars would doubtless buy a great deal more advertising in Indonesia than it would in its native America).

The pitfalls of this approach having been resisted, a more sensible course seemed to be to simply express all expenditures in local currency for each of the reporting countries. In this way, it is possible to calculate the percentage which advertising expenditure accounts for of each country's Gross National Product (GNP) for the relevant year.

**Table 1** summarises the position of the twenty-four countries, the definition of what is included in 'advertising' being as shown in Erhard's appendix. It is immediately evident that the proportionate share of GNP taken up by advertising varies greatly across the spectrum of the twenty-four nations. (Australians, for example, spend proportionately about six times more on advertising — expressed as a share of GNP — than do the Indonesians).

It will also be seen that there are five countries where the expenditure on advertising as a percentage of GNP is between 1% and 1½%. There are fourteen countries where it falls to between half a percentage point and 1% and a small number of countries (five) where it is less than 0.5% of GNP.

**TABLE 1**
**Advertising expenditure as % of GNP**

| | |
|---|---|
| **More than 1%** | |
| Australia | 1.47 |
| USA | 1.38 |
| UK | 1.34 |
| Finland | 1.19 |
| Switzerland | 1.02 |
| **0.5—1%** | |
| Netherlands | 0.99 |
| Canada | 0.98 |
| Brazil | 0.95 |
| France | 0.83 |
| Singapore | 0.80 |
| Hong Kong | 0.78 |
| Denmark | 0.77 |
| Ireland | 0.71 |
| Norway | 0.70 |
| South Africa | 0.68 |
| New Zealand | 0.64 |
| Germany | 0.62 |
| Belgium | 0.57 |
| Spain | 0.52 |
| **Less than 0.5%** | |
| Malaysia | 0.48 |
| Sweden | 0.43 |
| Italy | 0.41 |
| Thailand | 0.39 |
| Indonesia | 0.25 |

## MEDIA AVAILABLE TO ADVERTISERS

The central concern of our deliberations is readership research and, to that end, it is of especial interest to look at the role press plays in the context of the media which is available to advertisers.

### Press

Advertising in newspapers and magazines is universal practice in all the countries with which we are concerned. In the majority of these, the print medium has to fight for its share of the national advertising cake with the broadcast and other media. However, in a number of countries, there are restrictions of one form or another governing advertisers' access to television or radio.

For example, in the ethnographically-linked Scandinavian countries (Denmark, Norway and Sweden), neither television nor radio advertising is permitted. In neighbouring Finland, whilst limited television advertising is allowed, radio advertising is not; similar restrictions apply in Switzerland. Belgium has no domestic television advertising (but use is made of bordering Luxembourg) and, in three other European countries, there are substantial restrictions on television advertising — namely France, Germany and the Netherlands. In Italy, there are limitations placed on the national RAI channels but there is access to the private commercial channels.

Against this background, it is interesting to compare how countries differ in terms of how the national advertising budget is allocated.

As **Table 2** illustrates, the seven countries where press accounts for three-quarters or better of overall expenditure are those where television and radio advertising is either debarred or where severe limitations are placed on advertisers' access to those media. At the other end of the scale, there are seven countries where press accounts for 50% or less of advertising expenditure.

**TABLE 2**
**Press as a percentage of total advertising expenditure**

| | | |
|---|---|---|
| Norway | 97% | **75% +** |
| Denmark | 96 | |
| Sweden | 93 | |
| Finland | 88 | |
| Switzerland | 84 | |
| Netherlands | 82 | |
| Germany | 78 | |
| Malaysia | 74% | **50%—75%** |
| Belgium | 72 | |
| Singapore | 69 | |
| UK | 65 | |
| France | 60 | |
| South Africa | 60 | |
| Canada | 57 | |
| USA | 57 | |
| Italy | 56 | |
| Ireland | 51 | |
| Australia | 50% | **50% or less** |
| Spain | 48 | |
| Indonesia | 41 | |
| Hong Kong | 40 | |
| New Zealand | 38 | |
| Brazil | 33 | |
| Thailand | 20 | |

### Television

What of the obverse side of the coin — what share does television account for? We have seen that, in most countries, press is the dominant medium accounting for better than half the total advertising budget. However, as **Table 3** illustrates, it is exceptional for television to occupy that role but, in two countries, it does: Brazil (56%) and Hong Kong (55%). New Zealand at 44% also reports a larger than usual share of advertising expenditure going to television.

As already noted, there is no television advertising in Denmark, Norway and Sweden, and the proportionately very small share accorded to television in Finland, Germany, Belgium, Switzerland and Netherlands is a function of the restrictions on advertisers' access to that medium in those countries.

**TABLE 3**
**Television as a percentage of total advertising expenditure**

medium in those countries.

| | |
|---|---|
| Brazil | 56% |
| Hong Kong | 55 |
| New Zealand | 44 |
| Thailand | 37 |
| Indonesia | 34 |
| Spain | 34 |
| Australia | 33 |
| Ireland | 33 |
| Italy | 31 |
| USA | 31 |
| UK | 29 |
| Singapore | 27 |
| Canada | 22 |
| South Africa | 20 |
| France | 15 |
| Malaysia | 15 |
| Finland | 12 |
| Germany | 12 |
| Belgium | 10 |
| Switzerland | 9 |
| Netherlands | 8 |

None = Denmark/Norway/Sweden

### DAILY NEWSPAPERS AND CONSUMER MAGAZINES

We next turn to look at the availability of daily newspapers and consumer magazines in the twenty-four countries*.

The data in this instance relate to 1979 and, doubtless, there will have been changes since then in some of the countries reported on. However, this comparison, albeit a little dated, does allow us to see how the various markets with which we are concerned are served in terms of the availability of print media.

**Data based on* WORLD ADVERTISING EXPENDITURE (1980) EDITION — *Starch/INRA/Hooper/IAA.*

# 1.1 Comparative methodologies and major changes since New Orleans

There are five countries for which no data were available (Belgium, Brazil, Denmark, Hong Kong and Indonesia).

**Daily newspapers**

With regard to the remaining nineteen, the number of daily newspapers available to potential readers varies greatly from one market to another. Sixteen of the countries for which we have information can be categorised in small, medium and large groups, as shown in **Table 4**

**TABLE 4**

| | |
|---|---|
| **Small** | |
| *Those with less than 50 daily newspapers* | |
| New Zealand | ( 34) |
| Malaysia | ( 34) |
| South Africa | ( 23) |
| Singapore | ( 11) |
| Ireland | ( 7) |
| **Medium** | |
| *Those with 50 — 100 daily newspapers* | |
| Italy | ( 92) |
| France | ( 83) |
| Finland | ( 79) |
| Norway | ( 72) |
| Australia | ( 65) |
| **Large** | |
| *Those with 100 — 125 daily newspapers* | |
| UK | (125) |
| Sweden | (125) |
| Spain | (120) |
| Canada | (120) |
| Switzerland | (113) |
| Netherlands | (110) |

Some distance ahead of the others we have Thailand with 163, then a very large jump indeed to Germany with 408, and, quite dissimilar from all the rest, the USA is reported to have a whopping 1,744 daily newspapers.

It should be noted, of course, that comparisons in this context can take on some of the illogicality of measuring apples and oranges. For example, the figures which are given take no account of circulation nor the differences between regional and national newspapers. Thus, a daily paper such as *The Sun* in the UK which, in 1982 had a circulation of 4,083,000, gets the same weight in this comparison as does the *Corriere Del Ticino* in Switzerland which had a circulation in that same year of just 31,000.

**Consumer magazines**

Moving on to consumer magazines, there was no information for four of the countries for whom daily newspaper data was also unavailable, (namely Brazil, Denmark, Hong Kong and Indonesia); additionally, there were no data available on consumer magazines for Thailand. As with daily newspapers, there are considerable differences in the number of titles available in each country. Using the same two initial categories as for newspapers, **Table 5** emerges.

After that, the figures follow no collective pattern. Of the remaining six countries, the US and the UK are very far ahead of all the others with virtually identical figures (UK = 1,152; US = 1,155). These are followed by Italy (943) and, much further down the scale, comes Canada (336), followed by Germany (268), and finally France (190).

**TABLE 5**

| *Those with less than 50 Consumer magazines* | | *Those with 50—100 Consumer Magazines* | |
|---|---|---|---|
| Malaysia | (44) | Australia | (100) |
| South Africa | (36) | Spain | (100) |
| Sweden | (30) | Belgium | ( 94) |
| New Zealand | (26) | Finland | ( 70) |
| Singapore | (19) | Netherlands | ( 67) |
| | | Switzerland | ( 56) |
| | | Ireland | ( 50) |
| | | Norway | ( 50) |

**Daily newspaper and consumer magazines combined**

Adding the figures for both types of publication together, the five countries which emerge with the highest combination of both daily newspapers and consumer magazines available in their home markets are as in **Table 6**, which contrasts starkly with the position seen in **Table 7** for the five countries at the other end.

**TABLE 6**
**Number of titles available**
(Daily newspaper and consumer magazines combined)

| | |
|---|---|
| US | 2,895 |
| UK | 1,277 |
| Italy | 1,035 |
| Germany | 676 |
| Canada | 456 |

**TABLE 7**
**Number of titles available**
(Daily newspapers and consumer magazines combined)

| | |
|---|---|
| Malaysia | 78 |
| New Zealand | 60 |
| South Africa | 59 |
| Ireland | 57 |
| Singapore | 30 |

## DETAILS OF SURVEYS

Turning from the more general data to the information collected by Erhard Meier from the thirty-two survey contractors, the first point perhaps to note is that we have less in common with one another than might have been supposed. This point will become clearer as the story unfolds.

### Methodology

One common thread which does run through twenty-nine of the thirty-two surveys is that they are all conducted by personal face-to-face interviews. The only surveys which are exceptions to this rule are the Market/Media Skanner survey in the Netherlands, conducted by telephone, and the two surveys which use self-completion, mail-back questionnaires, namely, the Swedish (Orvesto) survey and the UK (TGI) study.

### Media covered

The primary task in most surveys is to cover newspapers and magazines, with other media being of secondary significance. Exceptions to this rule are Germany (MA), Indonesia, Ireland, Malaysia, Singapore, South Africa and Spain, where the print and the electronic media are accorded equal importance in the survey objectives. **Table 8** summarises the position.

**TABLE 8**
**Number of surveys covering**

| | |
|---|---|
| Newspapers | 32 |
| Magazines | 31 |
| Cinema | 29 |
| Television | 28 |
| Radio | 23 |
| Outdoor | 5 |

It can be seen that **newspaper and magazines** are covered in thirty-one of the thirty-two surveys, the exception being the Italian (ISEGI) survey which deals exclusively with newspapers. **Cinema** is included in all but two of the thirty-one multi-media surveys; the exceptions being the two American studies. **Television** is measured in twenty-eight of the multi-media surveys; as has been already reported, the Scandinavian countries have no television advertising and in neither of the Norwegian surveys nor in the Swedish survey is television included; it is however incorporated in the Danish survey. **Radio** features in twenty-four of the multi-media surveys; seven surveys exclude radio, the countries concerned being the Netherlands (in all three surveys), Finland, Norway (in both surveys), and Sweden. **Outdoor**, often cited as the Cinderella of the media research scene, once again emerges in that role in that in only five countries — namely, Canada, Denmark, Hong Kong, Sweden and USA (SMRB) is it covered.

### Sample size

As **Table 9** illustrates, the size of sample employed varies greatly, ranging from the Netherlands' telephone survey at 39,000 to Singapore at 4,700.

### Sampling points

The range of sampling points allocated to the various surveys differs considerably and is usually a function of the size of sample itself. (Thus, for example, Singapore, the smallest survey with a sample of 4,700, utilises 192

**TABLE 9**
**Sizes of samples**

| | |
|---|---|
| Netherlands (M/MS) | 39,000 |
| Netherlands (NIPO) | 30,870 |
| UK (NRS) | 28,500 |
| Australia (RM) | 26,000 |
| UK (TGI) | 24,000 |
| Norway (MMI) | 24,000 |
| Sweden | 20,300 |
| Germany (MA) | 20,100 |
| Spain | 20,000 |
| USA (Mediamark) | 20,000 |
| Italy (ISEGI) | 19,926 |
| Italy (ISPI) | 19,500 |
| USA (SMRB) | 19,000 |
| South Africa | 17,000 |
| Denmark | 15,000 |
| France | 15,000 |
| Brazil | 14,600 |
| Canada | 12,190 |
| Australia (McNair) | 12,000 |
| Norway (NMI) | 12,000 |
| Belgium | 10,000 |
| Malaysia | 10,000 |
| New Zealand | 8,500 |
| Indonesia | 8,250 |
| Germany (AWA) | 8,000 |
| Switzerland | 8,000 |
| Netherlands (NOP) | 7,600 |
| Thailand | 7,000 |
| Finland | 6,000 |
| Hong Kong | 6,000 |
| Ireland | 5,000 |
| Singapore | 4,700 |

**TABLE 10**
**Number of interviews per sampling point**

| | | |
|---|---|---|
| Norway (NMI) | 120 | **20 +** |
| Australia (McNair) | 38 | |
| Italy (ISPI) | 31 | |
| Italy (ISEGI) | 26 | |
| Thailand | 25 | |
| Singapore | 24 | |
| Malaysia | 18 | **10—19** |
| Ireland | 17 | |
| UK (NRS) | 16 | |
| Hong Kong | 15 | |
| USA (SMRB) | 15 | |
| Denmark | 14 | |
| Germany (AWA) | 13 | |
| Indonesia | 10 | |
| Switzerland | 9 | **Less than 10** |
| USA (MM) | 8 | |
| Brazil | 6 | |
| Canada | 6 | |
| South Africa | 6 | |
| UK (TGI) | 6 | |
| Belgium | 5 | |
| Finland | 5 | |
| Netherlands (NIPO) | 5 | |
| Germany (MA) | 4 | |
| Netherlands (NOP) | 3 | |

*Note: The calculation of number of interviews per point has been arrived at by dividing the reported annual sample size by the reported number of sampling points. (See* **Table 4** *in* Summary of Current Readership Research*). It may be that in some countries this does not provide a totally accurate picture.*

sampling points whilst the NIPO survey in the Netherlands, with a sample of 30,870, draws on 6,500 sampling points).

A comparison of the number of interviews per point provides in **Table 10** the picture for the twenty-five surveys for which we have relevant data.

### Sample representation

Generally speaking, samples are representative of the population as a whole, with differing age thresholds — a point I will return to in a moment. There are six exceptions, however, to that rule and they are as follows: In *Brazil*, where the survey is confined to just eight markets; in *Indonesia*, where it is confined to six cities; in both *Denmark* and *South Africa*, where it is conducted in private households only; in the *Netherlands* (in the case of Media Skanner's telephone survey) it is of course representative of only telephone households; in *Switzerland*, only those people who can speak the official language of the region are interviewed.

### Age threshold

In more than half (17) of the surveys, the definition is: 'all aged 15 years and over'. There are three surveys where the age threshold is higher. In South Africa, it is 16 and over and, in both the United States' surveys, it is 18 years and over.

In eight surveys, the age threshold is lower than 15. In Hong Kong, the survey commences with those aged just 9 years and over; in Canada, Finland and Thailand, it is 12 years plus; and, moving up a year to 13+ in Australia, Denmark and two of the surveys which are done in the Netherlands (NOP and NIPO). The two German surveys are representative of national population aged 14 and over.

In three countries, terminal ages are set — Brazil (65), Sweden (70), and Switzerland (74). Neither Roy Morgan in Australia nor McNair in New Zealand report an age threshold figure.

**TABLE 11**
**Number of publications exposed**

| | |
|---|---|
| Thailand | 207 |
| Norway | 187 |
| USA (Mediamark) | 178 |
| Switzerland | 169 |
| Netherlands (M/MS) | 166 |
| Brazil | 160 |
| UK (TGI) | 153 |
| Netherlands (NOP) | 145 |
| Belgium | 135 |
| Germany (AWA) | 131 |
| UK (NRS) | 118 |
| USA (SMRB) | 110 |
| Germany (MA) | 103 |
| Indonesia | 96 |
| France | 94 |
| Malaysia | 92 |
| Italy (ISPI) | 82 |
| Sweden | 78 |
| South Africa | 72 |
| Netherlands (NIPO) | 70 |
| Hong Kong | 65 |
| Australia (McNair) | 64 |
| Finland | 63 |
| Denmark | 62 |
| Canada | 52 |
| Singapore | 52 |
| Australia (RM) | 47 |
| Spain | 46 |
| Italy (ISEGI) | 43 |
| New Zealand | 37 |
| Norway | 32 |
| Ireland | 18 |

**Number of publications per respondent**

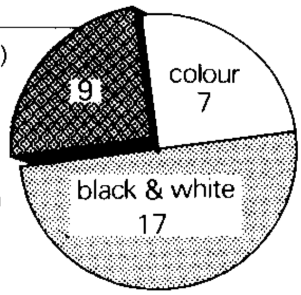
**Table 11** illustrates the variation in the thirty-two surveys in terms of number of publications which respondents were exposed to:

As **Table 11** showed, the average respondent in the thirty-two surveys was exposed to ninety-eight publications but, as in so many other instances seen in this comparative review, the average does not really give an accurate picture of the quite vast range in practice. The good people in Thailand, for example, who are chosen to represent readership habits in that country, are exposed to over 200 publications, whilst in Ireland, as few as eighteen mastheads are shown to respondents.

**Stimulus**

As the chart below illustrates, in twenty-four of the thirty-two surveys, mastheads are used. In seven of these cases they are coloured and in all other cases, black and white. In Denmark, the famous Danish Disc is utilised with black and white reproductions of titles on the disc. SMRB in the States use coloured mastheads for screening and stripped issue for their TTB interviews. (Slightly more than half of those who use mastheads (14) present them to respondents on cards which are shuffled, the balance use bound booklets).

**STIMULUS**




**The numbers on this chart add to 33 as SMRB in the US use a combination of masthead and TTB.*

EXCEPTIONS TO THE USE OF MASTHEADS

There are a limited number of exceptions to the rule of using mastheads and they are as follows: in the US (SMRB) and in Canada, the TTB method is used; in Australia (Roy Morgan), printed titles are used for newspapers and weekly magazines but reproductions of front covers are used for monthly magazines; in Brazil and the Netherlands (NIPO), cards listing printed titles are utilised.

In the Swedish and UK (TGI) surveys, because of the self-completion technique, printed titles are used. In the

Market/Media Skanner survey in the Netherlands, titles are read out over the telephone.

### Interview length

No data were forthcoming on the length of interview in relation to five surveys. For the remaining twenty-seven, the time taken for the interview is shown in **Table 12** (the figures relate to number of minutes taken to complete the interview). In the case of the UK (TGI), Germany (AWA), USA (SMRB), Thailand, Indonesia, Hong Kong, Italy (ISEGI) and the Netherlands (M/MS), a range was given when answering this question. Thus, for example, in the case of the TGI, it was reported that the interview can take between 75 — 150 minutes. For comparative purposes, where a range has been given, the mean has been calculated and is the figure used in the comparative interview length table: thus the TGI figure is 112 minutes.

Because a range was given in some cases, it is not possible to provide an absolutely accurate average length of interview for the twenty-seven reporting surveys. However, taking the mean for those who gave a range, one can say that across the spectrum of those who replied to this question, the average length of interview is 42 minutes.

### Readership section

The percentage of time taken up with the readership section of the questionnaire varied very considerably from one survey to another as **Table 13** illustrates. It should also be noted that the base for analysing the length of time the various readership sections took up of the individual interviews falls to 26. (There was no information available from New Zealand on the length of time the readership section occupied in that country's survey).

As with the length of interview, when respondents gave a range for the length of time the readership section took, a mean has been calculated and this has been applied to the total (or average) length of time the data expressed as a percentage of the assumed overall interview length.

What can be seen is that in Norway, three-quarters of the interview length is taken up with the readership section but this falls to just one-seventh in Indonesia and is a tiny proportion in the UK (TGI) survey. It also should be noted that in suggesting that 4% of the TGI survey is taken up with the readership section, the basis for this calculation is that the average length of a TGI interview is taken as 112 minutes: however, as reported, the TGI survey can range from 75 — 150 minutes so that the readership section can range from about 7% to 3% of the overall interview length.

**TABLE 12**
**Length of interview (minutes)**

| | |
|---|---|
| UK (TGI) | 112* |
| Germany (AWA) | 73* |
| Belgium | 60 |
| USA (MM) | 60 |
| Netherlands (NOP) | 58 |
| Germany (MA) | 57 |
| USA (SMRB) | 50* |
| Canada | 45 |
| Netherlands (NIPO) | 45 |
| New Zealand | 45 |
| Thailand | 45* |
| Brazil | 40 |
| Australia | 40 |
| Italy (ISPI) | 40 |
| Malaysia | 40 |
| Norway (NMI) | 40 |
| Norway (MMI) | 40 |
| UK (NRS) | 36 |
| Indonesia | 35* |
| South Africa | 35 |
| Switzerland | 35 |
| Denmark | 30 |
| Singapore | 30 |
| Ireland | 30 |
| Hong Kong | 27* |
| Italy (ISEGI) | 25* |
| Netherlands (M/MS) | 19* |

N.I. = 5 Surveys

** In these cases, where a range was given, the mean has been calculated and is the figure used for interview length.*

### Sponsorship

There is no information available on sponsorship for three surveys. Of the remaining twenty-nine, the most common form is that of an industry contract; this is so in the case of twelve surveys. The countries where this applies are Belgium, Canada, Denmark, Finland, France, Germany (MA), Ireland, Netherlands (NOP), Norway (NORSK Medie indeks), South Africa, Switzerland and the UK (NRS).

The next most common arrangement is where the survey is sponsored by individual publishers or advertising agencies, advertisers or a combination of all these. There are nine surveys where this applies and the countries involved are Australia (McNair Anderson), Hong Kong, Italy (both ISPI and ISEGI), Norway (MMI), Spain, Sweden and Thailand.

To round out the picture, there are seven surveys

**TABLE 13**
**% of time readership section takes of total interview**

| | |
|---|---|
| Norway | 75% |
| Singapore | 67 |
| Italy | 63 |
| Malaysia | 63 |
| USA | 60 |
| Canada | 56 |
| Switzerland | 49 |
| Germany (MA) | 47 |
| Netherlands (NOP) | 47 |
| Brazil | 45 |
| Netherlands (NIPO) | 44 |
| UK (NRS) | 44 |
| South Africa | 43 |
| Belgium | 42 |
| Denmark | 42 |
| Netherlands (M/MS) | 42 |
| USA (MM) | 42 |
| Germany (AWA) | 41 |
| Italy | 40 |
| Australia | 38 |
| Norway (NMI) | 38 |
| Hong Kong | 33 |
| Ireland | 33 |
| Thailand | 33 |
| Indonesia | 14 |
| UK (TGI) | 4 |

No information on 6 surveys

where the funding is on a subscription basis. These are Germany (AWA), Malaysia, Netherlands (Market/Media Skanner), Singapore, UK (TGI) and the two US studies (Mediamark and SMRB). Finally in the case of Brazil the survey is funded by the sale of the reports.

## READERSHIP QUESTIONS

### Rotation of publication groups

Practice is pretty well evenly divided in regard to whether or not publication groups are rotated. Of the thirty-two reporting, just over half do and the other half do not. Of the fourteen who used a fixed order, the preponderance is to show dailies first. (There is no information in the case of one survey).

In summary, the position is:

BASE 31 SURVEYS

- Publication Groups Rotated 15
- Publication Groups Fixed 14

| | |
|---|---|
| Dailes first | 10 |
| Monthlies first | 3 |
| No information | 1 |

- Other 3

As can be seen, there were three surveys that did not fit into either of those two categories. In the case of the ISEGI survey in Italy, the question is not applicable as it covers newspapers only. In the South African survey, the publication groups are rotated for the filter question but fixed for the frequency question and, in the case of the Finnish survey, magazines are rotated but newspapers always come last.

### Rotation of titles within groups

In the case of titles within groups, there is virtually unanimous practice in that, in all but three cases, titles are rotated. In the case of the two surveys that used self-completion questionnaires, Sweden and the UK, this, of course, is not possible, and the Netherlands (NIPO) survey uses a fixed alphabetical listing.

### Sequence

The one thing that is clear from the answers to the questions on sequence is that there are clearly divided opinions on the best approach. Overall, seventeen surveys commence with a screening question. In ten of these, this is followed by a *frequency* question and subsequently by a *recency* question.

Australia (McNair)
Belgium
Germany (MA)
Italy (ISPI and ISEGI)
Norway (NORSK Medie Indeks and MMI)
Spain
Switzerland
USA (Mediamark)

There are a further seven surveys where the *recency* question follows the screening question with a *frequency* query coming after that.

Brazil
Canada
France
Malaysia
Netherlands (NIPO)
Singapore
South Africa

In the following cases, a *frequency* question is followed by a *recency* question and, in these instances, the frequency question acts as a filter.

Germany (AWA)
Indonesia
Ireland
New Zealand
Thailand
UK (NRS and TGI)

Four surveys invert that order and ask *recency* ahead of *frequency* with the recency question in this case acting as a filter; these countries are:

Denmark
Hong Kong
Netherlands (NOP and Market/Media Skanner)

Finally, there are four surveys who go a route separate from the others. In Finland, there is a screening question followed by a filter, while in the case of the SMRB survey in the US, there is a screening question followed by a recency question. Roy Morgan in Australia begins with a recency question; in Sweden, they commence with a frequency question.

### Type of frequency question

Two surveys do not employ frequency questions — Roy Morgan in Australia and SMRB in the United States. In all but four of the thirty surveys who do, a numeric frequency scale is utilised. Four use a verbal scale and, in all those cases, numeric explanations are given defining the verbal scale positions.

### Recency questions

The most common practice is for a direct question to be asked in regard to recency. In other words, one where the pre-codes are disclosed. This is the case in seventeen of the surveys reviewed. In nine surveys, the pre-codes are hidden.

Two surveys use a combination of direct and indirect — Italy (ISEGI), and the Mediamark survey in the United States where an indirect question is asked of newspapers and a direct question is asked about magazines.

The SMRB survey (US) asks an indirect question about newspapers but the TTB method is used for magazines where specific issue recognition determines average issue readership. In Canada, the TTB method is also in practice. (We do not have any information on Finland and a recency question is not asked in the Swedish survey).

### Quality of reading questions

Less than half of the surveys reporting use qualitative questions. The countries in which this is a feature are Canada, Denmark, Finland, Germany (both AWA and MA), Italy (ISPI), all three surveys in the Netherlands, both of the Norwegian surveys, South Africa, Switzerland, and both of the surveys in the United States. The extent to which individual practitioners use qualitative questions does vary greatly with perhaps Canada, Denmark and Mediamark in the USA being the countries who go furthest in this regard.

Source of copy is a question asked in thirteen out of the fifteen surveys and other questions relate to reading intensity (four), time spent (four), reading occasions (three) and ratings (two).

## SURVEY COSTS

The data on survey costs relates to just eleven studies. It would have been interesting to be able to compare costs as between all thirty-two survey contractors. Hopefully, Montreal is just the second in what will prove to be a long series of meetings when people from many countries, who are of like mind and who share a common interest in readership research, will gather. For future occasions, it would be very helpful to obtain more detailed and more precise information for *all* the surveys reported on. In regard to the eleven surveys for which we have costs, we are indebted to the European Media Research Organisation (EMRO) for providing the information.

Not surprisingly, having regard to the provenance of this information, the data relate essentially to Europe, South Africa being the only non-European country reported on.

In all cases, the data refer to the cost of the survey in 1982 and the local currency has been converted to the US dollar equivalent value, using end/1981 exchange rates. As pointed out earlier in a different context, there are some problems in choosing a common currency; at least in this case we are talking about a similar period in time — and a recent one — for all the countries concerned.

From **Table 14** it can be immediately seen that there is a very significant variation in cost as between the most (Germany MA) and least (Ireland) costly surveys — indeed, there is a fifteen-fold variation in the cost of the research conducted as between those two countries.

### Cost per interview

Clearly, the cost of the survey is often a feature of the sheer size of it; what may be of more interest is to look at the costs per interview. **Table 15** is perhaps a more realistic assessment of differential cost than the foregoing one.

**TABLE 14**
**Survey costs (1982) — US$**

| | |
|---|---|
| Germany (MA) | 1,640,350 |
| South Africa | 1,084,500 |
| France | 1,005,200 |
| UK (NRS) | 638,000 |
| Italy (ISPI) | 461,000 |
| Switzerland | 412,000 |
| Denmark | 310,000 |
| Netherlands (NOP) | 280,000 |
| Finland | 160,000 |
| Norway (NMI) | 120,000 |
| Ireland | 107,000 |

**TABLE 15**
**Cost per interview — US$**

| | |
|---|---|
| Germany | 82 |
| France | 67 |
| South Africa | 64 |
| Switzerland | 52 |
| Netherlands (NOP) | 37 |
| Finland | 27 |
| Italy (ISPI) | 24 |
| UK (NRS) | 22 |
| Ireland | 21 |
| Denmark | 21 |
| Norway (NMI) | 10 |

To more fully appreciate just how costs do vary from one country to the next, I have calculated a cost per minute scale for the nine countries out of the eleven which provide data on the length of time the interview took. In all cases, they gave an approximation of the time taken — no-one gave a range — and, therefore, whilst **Table 16** is not absolutely accurate, it does illustrate how survey costs differ from one place to another.

**TABLE 16**
**Cost per minute — US$**

| | |
|---|---|
| South Africa | 1.80 |
| Switzerland | 1.50 |
| Germany (MA) | 1.10 |
| Ireland/Denmark | 0.70 |
| UK (NRS)/Netherlands (NOP)/Italy | 0.60 |
| Norway (NORSK Medie Indeks) | 0.30 |

The least expensive survey on this basis is the NORSK Medie Indeks. On a per minute basis, this runs out at one-sixth the cost of the South African survey, a fifth the cost of the Swiss survey, and just about a quarter the cost of the German survey.

**SINCE NEW ORLEANS....**

It does not seem to me to be overstating the case to suggest that one signal result of the seminal meeting in New Orleans two years ago has been to prompt a number of people (in a number of different countries) to look closely at the traditions which applied to their media measurement practices and to query just how appropriate they are to today's needs. In this sense, the value of New Orleans as a catalyst in this exercise should not be underestimated.

Erhard Meier's questionnaire queried whether there had been any developments in the countries being surveyed in respect of the national survey or other readership research activity.

The following is a summary of the responses to that question. From the privileged standpoint of having had sight of the better than sixty papers which will be presented in Montreal, it is clear that changes other than those relayed here have taken place. However, the summary which follows, whilst not claiming to be exhaustive, does detail the responses from the nine countries covering fifteen surveys who answered that particular query.

**Brazil**
The Brazilians have experimented with a readership diary.

**Germany**
Both MA and AWA have re-examined their approach. In MA's case, they have undertaken a series of experiments. These have involved masthead sizes, question order and number of frequency scale positions (where they have reduced the original from twelve to seven). In the case of Allensbach, they now use an intensity of reading scale.

**Hong Kong**
From South East Asia, we hear that Hong Kong has undertaken some experimental work relating to provenance or source of copy.

**Italy**
The Italians (ISPI) too have experimented in this very same area. Also, they have replaced the standard magazine readership section with a product usage section. Because fieldwork involved going back to 1981

informants, it was possible to cross-analyse the product usage data by the previous year's magazine readership data.

**Malaysia**
In South East Asia, the Malaysians have changed their black and white mastheads to colour variations.

**Netherlands**
The Dutch have been universally busy. In the case of NOP, there has been a complete re-vamp of the national readership survey. This has involved, inter alia, new research contractors, new sample frames, timing of fieldwork and the whole multiplicity of hurdle, frequency and sequence questions have been reviewed. Whilst AIR definitions have not altered, rotation and calculation of reading probabilities and total reach have undergone change.

In the case of NIPO, they now cover magazines with just 40% of the total sample. And finally in Holland, there is the continuous survey using telephone interviews with almost 40,000 respondents (conducted by Market/Media Skanner).

**Norway**
The Norwegians, both NORSK Medie Indeks and MMI, also report changes. In the case of the first mentioned, there is a change on the filter question from a "read within last year" to "within last twelve-issue period".

In the case of MMI, we learn that no survey was conducted in 1982/83 but, for the next survey, it is proposed that the question of masthead cards being used for magazines be considered. (Presently, mastheads are confined to newspapers). There is also the question of whether viewing or listening to local broadcast stations should be included.

**United Kingdom**
Our friends in Britain have been no less busy. The JICNARS study group has looked at three specific areas.

They have set out to establish "the meaning of reading" (no small task!); some experimental work has been conducted and a small-scale pilot on an extended media list has been undertaken; and the perennial question of diary panels for readership surveys is also under review.

**United States**
There has been much activity reported in the USA, where MRI tell us of local media reports in 'business to business' categories which should be available in 1983 based on two years fieldwork.

SMRB, on the other hand, inform us that they now use the TTB method (stripped issues of magazines) for all consumer magazines. These now number 110; previously TTB was used for only 50 magazines, whilst a recency question was utilised for the others.

Finally, Starch/INRA/Hooper tell us of the Farm Audience Readership Measurement Service (FARMS). This proceeds by means of a reproduction of the front cover of the magazine issue printed at the top right-hand corner of the relevant self-completion questionnaire page.