

1.6 Norway: the development of industry surveys of consumer media

INTRODUCTION

This paper has two aspects. Firstly, we will concentrate on media research generated by private industry with the main purpose of supplying an aid for the evaluation and choice of media for advertising campaigns; this media research is seen as the opposite of the media research generated by university and other academic institutions. I want, however, to underline that in this limitation there is no hostility against the academic media research. It is worth mentioning that earlier this month the first seminar mutually arranged by the two parties with the purpose of interchanging views and experience was conducted with great success; these two parties to media research are not competitive, but complementary.

Secondly, we will concentrate on media research into consumer media as opposed to the trade, technical and professional press. Although several surveys are conducted for the latter group, they are often made for an individual sponsor and represent such a variety of methodology that it is difficult to present these surveys within the present framework.

Further, this paper contains nothing on radio and television. The reasons for this is that Norway, like the other Scandinavian countries (Denmark and Sweden), but unlike the other Nordic countries (Finland and Iceland), has not opened its ether channels for commercial use by advertisers. This situation may change during the first half of the decade to come, in which case, we will be prepared to include radio and television audience research into our surveys.

MEDIA SURVEYS UP TO 1978

In the history of media research in Norway two years must be emphasised. The first one is 1958 when it all seriously began, the other one is 1978 in which the national readership survey ('media-indeksen') became subject to radical changes in almost every aspect. Those changes, the contents of them, the background for and the reasoning behind them form the main topic of this paper.

'Fakta om 3 typer media'

Although some individual media surveys may have been conducted before 1958 it is that year when it seriously began. In 1958 the then leading market research institute, Fakta, issued its first report: 'Fakta om 3 typer

media' ('Fakta om 3 typer av media') based on approximately 16,000 interviews collected on the Fakta omnibus system in 1957-58. This first report was followed by another 14 until the last report was issued in 1972.

Which were the three types of media?

The three types were, firstly, newspapers, which for the main Oslo ones were reported by title, while smaller Oslo and provincial papers were reported in groups defined by size of circulation and the individual newspaper's position as leading or not leading in its main area of distribution; secondly, consumer magazines, of which approximately 15 main ones were reported by title; and, thirdly, cinema, which in the absence of commercial television was and still is the only audio-visual medium open for commercial use.

The sampling methodology of Fakta

As mentioned above, 'Fakta om 3 typer av media' formed part of the Fakta omnibus system. The sampling methodology of Fakta can shortly be described as a multi-stage probability sampling similar to the methodology in use for today's media surveying in Norway described in more detail below. Although the sampling method could be said to be relatively sufficient it was anyway an aspect of low interest for the media data users; in this respect, improvements have been made, especially during the 1970s.

Questionnaire technique

The questionnaire technique was – like the later techniques used – based on 'recent readership', ie readership within last issue period and thus based on period readership as opposed to issue readership. The questionnaire aids consisted of three cards, one for weeklies, one for bi-monthlies and one for monthlies with typed (ie neutral) title names without any description of the individual title. For newspapers no memory aids were used and the reason behind this being that newspaper readership happens so recently before interviewing that probably no aids are necessary.

This questionnaire technique was in use also for the national readership surveys executed during the period 1973–78. Up to 1974 the order of questioning were newspapers, weeklies, bi-monthlies and monthlies, from 1974 (with first reporting in 1975) this order was changed to the reverse order, the first sign that Norwegian media research had begun to draw on foreign experience.

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Surveying newspaper readership

As mentioned above, 'Fakta on 3 types of media' reported newspapers mainly in groups in accordance with their size of circulation and position within the main area of distribution for each newspaper title. This system was not satisfactory for the NAL (Norske Avisers Landsforbund/Federation of Norwegian Newspapers) because in the opinion of NAL only a report specifying each individual of the approximately 160 newspaper titles would be fair in the competition between newspapers for advertising revenue.

In 1969 NAL therefore sponsored a newspaper survey through the main competitor of Fakta: Norsk Gallup Institutt A/S. The sampling procedure for this survey was worked out so that a minimum of 150 interviews with women and 150 interviews with men were obtained in the circulation area of each newspaper (for both sexes, persons aged 15 years or more). The questionnaire technique employed involved 'recent reading' without any aids at all.

This survey was a disappointment to many newspaper advertisement department executives because, firstly, the amount of data became too heavy for operational media planning work in the advertising agencies. In this respect it is worth noticing that, while a newspaper representative was able to concentrate on the data for his own newspaper and the one or two in closest competition, the individual advertising agency media planning executive had to cover all 160 newspaper titles; many newspaper executives were not aware of this factor and found the newspaper survey investments not justified by the agency use of the survey results.

Secondly, the NAL executives were too influenced by general media planning methodology as described in literature and through speeches and course and seminar activities. Thus they were not aware of the principles of the deployment of advertising budgets to regions and sales districts and the particular influence of sales staff and dealers on the evaluation and choice of newspapers in each region and district.

When syndication of media research started in 1972 it was to some extent welcomed by NAL because it was hoped that the syndication would create systems also agreed by advertising agency representatives and therefore put more obligation on the agencies to use the data achieved. The result was that a new system for newspaper surveying was introduced with the introduction of IFM's Mediaindeks in 1973. IFM's Mediaindeks was the national readership survey succeeding 'Fakta on 3 types of media', but from 1973 fieldwork and tabulation was executed by Norsk Gallup Institutt A/S until 1976, when a merger moved the IFM's Mediaindeks to Norges Markedsdata a.s. up to the last report in the old format in 1978.

The system for newspaper research from 1973–78 was incorporation into the IFM's Mediaindeks. For this there was selected every year a national sample (in practice, with the same methodology used by Fakta); this national sample of approximately 16,000 interviews then formed the base for an annual reporting of weeklies, bi-monthlies, monthlies and cinema. Over three years, however, the sampling procedure aimed to cover all 443 communities and thus reach the main circulation distribution areas of each of the 160 newspaper titles. Reports in accordance with this system were made four times: 1975 (based on fieldwork 1973–75), 1976 (1974–76), 1977 (1975–77), and finally 1978 (1976–78). With the complete alteration of the survey in 1978 this three years 'rolling' system for newspaper readership ceased, and replaced by a project of regional readership surveying; the reasons for this change and a description of the regional readership surveys are given below.

Like the NAL/Gallup Survey of 1969, the 'rolling' system was a disappointment to newspaper staff, for almost the same reasons.

The move towards syndication

'Fakta on 3 types of media' was conducted on a private enterprise basis, on the account and risk of Fakta, with reports sold to media owners and advertising agencies. Up to 1971 the only attempt to arrive at any syndication was in 1966 when a joint committee with representatives of ARF (Autoriserte Reklamebyråers Forening/Association of Recognised Advertising Agencies); NAF (Norske Annonserers Forening/Association of Norwegian Advertisers); and NU (Norsk Ukepresse/Association of Norwegian Magazine Publishers), arrived at an agreement on demographic definitions and grouping in Norwegian market research, and as part of this also media research.

During 1971–72, however, parallel developments in several aspects caused an increasing interest in the syndication of Norwegian media surveys. These can be described as follows.

The negotiations up to the Advertisement Agreement of 1972 between ARF, NAF, NAL and NU of which a consequence was the institution of a media qualification test for agency personnel as a condition for agency recognition and for the agency to receive commission on space-buying in newspapers and magazines. ARF, however, argued that such a condition would be meaningless unless the qualified staff would have available sufficient planning 'tools' through national readership surveys. Consequently, ARF was of the opinion that the interested parties had to gain influence over media surveys.

After 1970 Fakta ran into a period of stagnation and commercial problems, probably caused by stronger com-

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petition (during the later 1960s the number of market research institutes rose from two to nine). A consequence was that in 1972 Fakta was taken over by new shareholders who wanted to stop the Fakta involvement in media research. This led to a fear that unless the interested parties involved themselves technically and financially, there would be stagnation – or worse – and Norway would be without a proper and usable media survey.

Also increasing contact abroad encouraged the idea of syndication, especially after the ESOMAR seminar on media planning in Naples in 1969.

All-in-all, the media circle became larger, more self-confident and aware of the specific problems and complications of media research.

The syndication in 1972 was innovated by ARF which over three years contributed the amount of Nkr. 500,000 to establish a syndicated body, IFM's Mediasentral under their IFM (Instituttet for Markedsføring/Institute of Marketing). Through its board IFM became commercially responsible for media surveying through IFM's Mediasentral (ie IFM's Mediaindeks) while technical responsibilities were allocated to the IFM Liaison Committee with representatives of ARF, NAF, NAL and NU in addition to DnFF (Den norske Fagpresses Forening/Association of Norwegian Trade, Technical and Professional Press).

The reason for making IFM commercially responsible was that the media owners were not yet prepared to establish a firm and preguaranteed financial background for media surveying. Under those conditions IFM was forced to sell the reports in the free market, and arrived at a deal in 1973 with Norsk Gallup Institutt A/S according to which the Institute accepted the responsibility for fieldwork and tabulation and in return IFM accepted the responsibility for technical development, marketing of reports and market development through educational activities. This system was in operation during the period 1973–78, on the Institute side taken over by Norges Markedsdata a.s. from 1976 after a merger in which Norsk Gallup Institutt A/S took part.

A consequence of the syndication in 1972 was that Norway obtained membership in EMRO (European Media Research Organisations) or the 'Club Dubois' after its innovator, M. René Dubois from France. Norway has sent representatives each year since 1972 and arranged the annual conference in Oslo in 1977. This strengthening of international connections caused an increasing interest in the deployment of new thinking in media surveying.

In 1976 it had to be admitted that the financial system was not sufficient. Without a firm and pre-guaranteed financial background a new period of stagnation seemed likely. In 1977 IFM therefore ceased

its contract with Norges Markedsdata a.s. in order to free its position for future arrangements, and NU put up to ARF a proposal for negotiations to arrive at a more mutual syndication system and parallel financial guarantees from media owners and mutual development funds. As a first step NU gave IFM financial guarantees for the surveying of its member publications for the period 1978–80. In 1980 ARF, NAF, NAL and NU concluded negotiations to form a new syndication institution, 'Norsk Mediesentral' to continue media surveying following the methodology used since 1978, but now with the survey designation: 'Norsk Medieindeks'. 'Norsk Mediesentral' established its own secretariat in January 1981.

Media studies by MMI

During the late 1960s a new market research institute, MMI (Markeds- & Mediainstituttet A/S) appeared on the scene. With its roots back to 1958 in the advertising agency industry, and occupying a leading position in consumer-oriented market research, MMI devoted special interest and heavy involvement to the area of media research. During the 1970s MMI conducted several media studies using a variety of questionnaire techniques and questionnaire aids and covering methodology of both 'recent reading' and methods close to 'through-the-book'. The results of those studies were used to increase MMI's own knowledge, and were shared with the media circle; results were also sold to individual media owners.

MEDIA SURVEYS AFTER 1978

As mentioned earlier, IFM ceased its contract with Norges Markedsdata a.s. in 1977 in order to free its hands for future institute arrangements, and in order to be objective IFM wrote to all market research institutes represented on the membership list of the Norwegian Market Research Society. From some institutes no reaction was obtained, from others IFM received a polite negative. A positive reaction was received from only two market research institutes, MMI and Norges Markedsdata a.s.

A set of very comprehensive negotiations with each of the two institutes was conducted. IFM had sought quotation for continuation of the former survey system, and also asked for new ideas from the two institutes involved. The outline for the survey system from 1978 can be said to have been generated by MMI, which in May 1977 submitted a very comprehensive document to IFM covering all aspects of media surveying.

Which media should be surveyed?

It was obvious. Since the launch of 'Fakta on 3 types of

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TABLE 1
Media turnover of recognised advertising agencies by media channels 1977-79

	1977		1978		1979	
	Nkr. '000	%	Nkr. '000	%	Nkr. '000	%
Newspapers	542	68.6	570	67.8	564	67.4
Magazines	128	16.2	130	15.5	136	16.2
Trade, technical and professional press	93	11.8	105	12.5	103	12.3
Other Norwegian media	27	3.4	36	4.2	34	4.1
Total	790	100.0	841	100.0	837	100.0

Note: Other Norwegian media: *Mainly cinema and outdoor.*

Source: *Annual reports of the ARF.*

media' in 1958 very little had happened in the general outline of the Norwegian media structure; magazines had ceased, others had entered the market, Government support had saved newspapers from the mortality of newspapers in other countries and radio and television were (still) not open to commercials. Basically, the main media channels for advertisers and their advertising agents were newspapers, magazines and cinema: the main media subject to surveying in 1977-78 were the same as in 1958.

The problem arose, however, which publications to include. Since the media owners had to provide financial pre-guarantees it certainly became a condition that a publication should participate in the financial arrangements: the advertising agencies feared a decline in the number of publications included, but in fact the demand for participation from publishers increased rather than declined after 1978. With this financial condition came some others of a technical nature in order to restrict reporting to those publications for which reasonable results in relation to circulation could be obtained.

Those conditions were obvious for nationally distributed publications, ie magazines and the larger Oslo papers which at least had a semi-national distribution. But what about the smaller Oslo newspapers and the provincial, regional and local newspapers?

There were two main arguments for including newspapers into the surveys.

Firstly, all available statistics show newspapers as an important medium. As the survey is a syndicated project for the benefit of the advertisers and their advertising agents -- it is a tool made for them to aid their decisions on the allocation of advertising budgets firstly to media categories and secondly to individual media within the categories selected -- probably the most important statis-

tics are those of agency turnover distributed by media as shown in **Table 1**.

Secondly, the need for data on regional and local newspapers becomes more and more apparent. Firstly, the concentration in retail trade in most countries has (regionally and locally) caused a strengthening of competition and further made it possible for regional and local advertisers to employ skilled marketing staff to conduct marketing planning. For this, data for advanced media planning are demanded and the newspapers must meet such demands. Secondly, circulation departments and editors are also in need of data in defining the function of the individual newspaper within the media structure in its competitive and/or complementary situation *vis-à-vis* other newspapers, radio and television.

Consequently, it was agreed that the system must allow for reporting of individual newspaper titles.

National and regional readership surveys

MMI proposed to divide the surveys into two individual projects: this proposal was adopted in the final plans, as follows.

Riksundersøkelse (National Readership Survey)

To provide data on national media, ie the larger Oslo newspapers, magazines and cinema. Reports would be delivered annually in August based on approximately 12,000 interviews on the MMI omnibus system from May in the previous year to April of the same year.

Handelsområdeundersøkelser (Regional Readership Surveys)

To provide data mainly on newspapers, the larger Oslo ones as well as the smaller Oslo ones and regional and local provincial newspapers.

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Why survey regional and local newspapers at all? Although the development of trade concentration has reached a higher level in Sweden and Finland, the Norwegian distribution channels are relatively grouped in larger units with a high level of competition. This means that marketing planning in general and media planning in particular are now also employed at the regional and local level. The marketers demand sufficient background information and the newspapers have to follow that up.

However, the 'rolling' systems used during the years 1973–78 could not be recommended for continuance. The reasons for this were, firstly, substantial parts of Norway consist of areas with a scattered population; with 160 newspapers of which the smallest one has a circulation of approximately 2000 many newspapers have a substantial part of their circulation in scattered areas, and interviewing in such areas is therefore necessary if the surveying is to be done properly. But in scattered areas, at least as scattered as in parts of Norway (and you would probably find as scattered areas in countries like Canada, Finland and Sweden) you can continue your interviewing only to a certain point, after which you have interviewed in almost all available households.

Secondly, demographic breakdowns, especially income, became meaningless when collected over three years. This factor could probably not be foreseen before the start of the system in 1973 where the annual rate of increase of wages was at a level of 3–4%, but after the employer/employee agreement in 1974 and up to a ban on price and salary increases, wages rose at an annual rate of 16–19%.

Thirdly, after 1973 the Oslo midday newspapers *Dagbladet* and *V.G.* expanded heavily in the provincial areas. Both *Dagbladet* and *V.G.* (as well as regional and local provincial newspapers) wanted measurements of the consequences of the circulation growth, in readership and duplication terms area by area, but a 'rolling' system cannot provide such data sufficiently exact for the marketing of newspapers.

Fourthly, it became impossible to control the sample versus the universe, which is an essential need in any survey.

Finally, it was difficult – not to say impossible – to give meaningful geographical breakdowns. The newspapers were again disappointed with the usage of the data among the advertising agencies; media planning literature as well as speeches and courses in media planning tend to overlook the fact that the circles of decision-makers and decision-influencers are not the same for national versus regional and local media. For regional and local media the advertising client tends to go deeper into the decision-making process considering the weight of advertising put into sales districts, deployment of advertising budgets to areas with an advertising-to-sales

ratio or taking into account dealer attitudes and their off-take, etc. Newspaper people were not completely aware of this fact, and tended to base their stories argument on traditional costs per '000 arguments.

Instead, MMI proposed to cover the need for newspaper data through a set of 'trade area' surveys. The Norwegian Central Bureau of Statistics has since 1955 divided Norway into trade districts ('handelsdistrikter') of which there are 123, trade areas ('handelsområder') of which there are 23 and finally trade regions ('handelsfelt') of which there are four.

Those areas are defined thus:

(1) While people tend to buy their groceries in a small neighbourhood outlet they go sometimes to a centre in order to make larger grocery purchases or to visit specialist outlets for the purchases of more costly items, eg clothes and shoes; those communities from where people go to the same such centre are collected in one trade district and throughout Norway there are 123 such centres.

(2) For purchases of even larger items, eg larger furniture or cars, people tend to go to larger centres with a wide range of products to choose between. Those trade districts from where people travel to the same centre for such purchases are collected in one trade area, of which there are 23.

(3) The four trade regions each consist of a number of trade areas; the trade regions follow the traditional landscape division of Norway into an Eastern–Southern part, a Western part, a Midland part and the Northern part.

But this division of the country is relevant not only to the geographical pattern of the purchasing. People's connection to a centre also affects their choice of daily newspaper regionally and/or locally, ie trade areas would be a convenient breakdown of the country for regional and local newspaper readership surveying. MMI further proposed that such a set of individual trade area surveys could be carried out in a concentrated time period and be repeated at agreed intervals (for example every third year) which would be in accordance with development trends during recent years. Should there in one area appear a substantial development one could, during the three years period, carry out a survey in the area concerned.

IFM accepted this system which, with reference to the disadvantages of the 'rolling' system, solved the problems thus: Firstly, as interviewing was conducted for this survey only with a time interval, even in scattered areas the sample would not be used up.

Secondly, the field work could be referred to a clearly defined period in time and would thus give meaningful demographic breakdowns as well as provide a meaningful description of the competitive situation between national, regional and local media when reference to the

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field work period is given.

Thirdly, one would be able to control the sample against published population statistics from the Central Bureau of Statistics.

Finally, trade areas represented a meaningful and universally accepted set of geographical breakdowns, matching the newspapers' way of geographical thinking to that of the advertisers and their advertising agents.

Details of the two surveys are given in **Figure 1**. For the National Readership Survey two full reports are available (1979 and 1980) and this survey could now be said to have been fully accepted by all data users; for the Regional Readership Surveys on the new system the first report appeared in autumn 1980. Since Regional Readership Surveys on the regional and local plan are distributed also to a relatively large circle of inexperienced

data users, they are particularly followed up by MMI to secure effective and proper usage of the survey data. The follow-up activities include a large number of presentations of survey methodology and results throughout Norway, further instruction meetings to advertising agencies and circles of advertisers, articles in professional marketing and newspaper periodicals, and a telephone advisory service; a heavy programme was launched just after reporting in August/September 1980 but the different activities will be continued as long as there exists a demand for services.

We are aware that surveying for individual or groups of newspapers along those lines has been executed in other countries. In Norway we felt the lack of comparative data for evaluation and choice of newspapers, and therefore established this survey with the participation of all newspapers although the total number of newspapers is relatively high.

The fact that one aims at setting up a set of surveys along the same line throughout the whole country gives to some extent specific problems which are too complicated to describe here and probably also will show variations from country to country. MMI has been working on all phases of the project for more than two years and has during this process acquired experience it is willing to discuss with others.

FIGURE 1

	<i>Riksundersøkelse</i> (National Readership Survey)	<i>Handelsområdeundersøkelser</i> (Regional Readership Surveys)
No. of surveys	1	23
Execution		
General	continuous	Every 3rd year
First time	1978-79	1979-80
Next time	1980-81	1982-83
System	MMI omnibus	MMI <i>ad hoc</i>
Reporting		
General	Annually	Every 3rd year
Up to now	1979 and 1980	1980
Next time	1981	1983
Universe	National population 15 years +	Population in each trade area 15 years +
No of interviews	12,000	24,000
Sampling procedure	Geographical multi-stage probability	Multi-stage probability
Media included	Magazines Cinema 5 Oslo newspapers	Regional and local newspapers + media in National Readership Survey

The questionnaire technique

As described above, the Norwegian questionnaire technique up to 1978 used relatively 'primitive' aids for the memory of the respondent as to what she or he had been reading. For newspapers no memory aids were used, for magazines typed (ie neutral) lists of magazines in alphabetical order and without any kind of description as to the nature of each magazine or its editorials.

Through increasing connections with media researchers in other countries and the media survey method tests conducted by MMI in the early 1970s it became clear that the questionnaire methodology had to be improved substantially. The previous method had to some extent been maintained by habit and economy: now (ie in 1976-77) the media owners acknowledged its insufficiency, and the magazine press also agreed that an improvement had to be made even at increasing costs.

The result was that a set of requirements to the questionnaire technique was established as follows. The questionnaire should:

(1) *be designed in a way to be interesting for both interviewer and respondent*

During the mid 1970s the number of readers per copy declined in Norway; to some extent this could be a real marketing factor, but it could also be seen as a sign that having the same interviewer corps asking the same questions month after month, year after year, simply

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could cause a lower interviewer quality and a lack of care causing improper recording.

It would not be appropriate to substitute one monotonous questionnaire technique by another: one would just run into the same problem in a few years. The technique should motivate both the interviewer and the respondent to stimulate high quality interviewing.

(2) *'force' the interviewer to conduct the whole media questionnaire*

We were aware that many trends in modern society work against the successful execution of interviewing in people's homes. Therefore, although we aimed at providing a questionnaire interesting for the interviewers this could in longer terms not be enough to secure proper interview quality. We therefore had to put an element of force into the technique.

But why personal interviewing? Did we not consider other ways of approach such as the use of telephone or mail? Of course we did, but those methods were rejected, because of some of the other questionnaire requirements outlined here. Another point was that we consider media research so difficult a topic that we would prefer the execution quality and control obtainable through a high quality interviewer corps who could interview people in their homes and constantly report back on any problems arising.

(3) *enable us to catch up all readers, also the more infrequent ones*

The result of the MMI test work in the early 1970s indicated that even a 'primitive' questionnaire technique will register those readers with a very firm relationship to the publication. But the more infrequent readers are also of importance to: advertisers and their advertising agents, because also more infrequent readers form part of their coverage for their advertising; editors because the more infrequent readers add to the influence of the paper; the marketing staff of the media owners because the change of infrequent readers to frequent readers probably represent a more appropriate marketing target than to persuade complete non-readers to start reading. We use frequency of reading as an important base for recruitment of respondents for various surveys for editors and for media marketing departments.

(4) *present the different publications for the respondent's evaluation of her or his readership*

In Norway we cannot exclude that certain prestige or its opposite is linked to readership of different publications; it could be linked with prestige to claim readership of a serious broadsheet newspaper as opposed to a tabloid midday newspaper, to claim readership of newspapers as a group as opposed to magazines as a group, etc.

If we presented lists or in any other way enabled the respondent to control her or his answers we might risk

that the respondent said to her or himself: 'I can claim 1-2 magazines but not more', even the truth could be three, four or even five or six. We further believe that presenting the publications individually in random order, we have made substantial efforts to overcome this problem.

(5) *the different publications must be presented to the respondents in different order randomly and varying from interview to interview*

I do not think it necessary to go into depth on the reasoning on this point. What we of course want to avoid is that certain publications obtain advantages by always being shown first as opposed to others obtaining disadvantages by always being shown last, but this was our case up to 1978.

(6) *minimise the possibilities of confusion between titles*

This is a problem familiar to all of us. In our questionnaire up to 1978 we had two women's magazines: *Alle Kvinner* and *Kvinner & Klær* of which the former has now ceased publication. However, *Alle Kvinner* regularly had a higher reader-per-copy score than *Kvinner & Klær* without any natural explanation. For us, confusion created by readers of *Kvinner & Klær* claiming *Alle Kvinner* was the most likely reason.

(7) *include self-controlling questions*

Such self-controlling questions must of course be linked to the more precise media data of controlled circulation, both in terms of subscriptions and street sales. Even the greatest care employed in all technical aspects must not cause an attitude of infallibility among us.

The seeking of an appropriate questionnaire technique

In a small country like Norway it would be difficult to find the necessary resources to develop anything from scratch, both in terms of economy and of qualified manpower.

Different foreign techniques were studied by IFM as well as MMI prior to the negotiations for a new form of survey. MMI proposed to IFM to adapt the German questionnaire technique developed by the 'Arbeitsgemeinschaft Mediaanalyse' in Frankfurt/Main for the 'Media-Analyse' (the German National Readership Survey).

This technique could fulfil the requirements 1-7 as described above because the usage of cards for sorting would create an interesting interview situation; once sorted out, the card technique would 'force' the interviewer and the respondent through the interview; cards with mastheads would help the memory of the respondent and thus aid to catch *all* readers, including the more infrequent ones; as the cards would be loose cards (ie an individual card for each publication not assembled in a booklet) we would ensure individual presentation of

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each publication; loose cards combined with instructions to interviewers *not* to make efforts to present them in any order (eg alphabetically or in accordance with issue frequency) but rather to blend them, would aid random presentation; usage of logo and other firm front page elements would reduce the possibilities of confusion – preferably to a minimum level; question on method of obtaining last copy read, specifying among other methods subscription and own street purchase, would include an element of self-control.

Thus it was finally decided to concentrate our efforts on adapting the German technique. I describe below the differences between the German technique and the Norwegian technique, and the reasons for making an adaptation rather than a translation. As, however, one of the main reasons is the use of an omnibus system I will first explain the reasoning behind this.

The considerations in an omnibus system

We had to consider whether future surveys (ie from 1978) should be executed on an omnibus system as hitherto (from 1958) or through a continuous *ad hoc* survey. There was, however, no discussion whether to make a complete continuous survey with interviewing every month apart from the heavy vacation month of July as the first alternative or a more time-restricted survey as the other alternative. We have always felt it convenient to collect a sufficient number of interviews over shorter periods (for reasons of economy and interviewer capacity) and we did not want the media in their editorial and marketing policy to be able to go for specific interview

periods.

It was decided to go for the usage of the MMI omnibus system rather than for a specific continuous *ad hoc* media survey. The reasons were as follows:

- (a) it would be most economical.
- (b) it could be started at relatively short notice because the MMI omnibus survey was already functional and had been for several years, while an *ad hoc* survey would have to be designed in all details before the start.
- (c) apart from being less expensive an *ad hoc* media survey would probably in itself give a relatively low and insufficient income for the interviewers; a way of counter-action could be to pay a relatively high price to the interviewer for the interviews in an *ad hoc* survey, but that could influence the whole structure of the MMI policy of salarizing interviewers and thereby put MMI in an embarrassing situation towards their interviewers or in a weakened price competition with their competitors on the omnibus survey market.
- (d) We would secure the interviewers more variation in their job because the omnibus questions would be for different sponsors and different products, using a variety of questionnaire techniques.
- (e) There would be more cross-tabulation possibilities for the subscribers whether media, advertising agencies or advertisers.

The usage of an omnibus system was of course applicable for the National Readership Survey only; as no regional omnibus systems are available in Norway we had to choose *ad hoc* surveying for the Regional Readership Surveys, which in addition are not continuous.

FIGURE 2

	Germany	Norway
1 Introduction	Travelling	Travelling
2 General filter	'Ever read' (passing)/'never read' (excluded)	'Read within last 12 months' (passing)/not read within last 12 months (excluded)
3 Special filter	Read within last period in which 12 issues are published (passing)/not read within this period (excluded)	No special filter
4 Frequency	No. of last 12 issues read	No. of last 12 issues read
5 Recency	Read within last issue period	Read within last issue period
6 Self-control	Method of obtaining last copy read	Method of obtaining last copy read

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It was agreed between IFM and MMI that the media questions should always come first in the omnibus questionnaire.

The differences between the German technique and the Norwegian adaptation

The differences between the German technique as studied in 1976–77 by us and our adapted technique as used from 1978 are shown in **Figure 2**.

Summarising the two sets of questions, the differences are found in the filtering, both the general filter (point 2) and the special filter (point 3).

Let us take the general filter first. While Germany in population terms is the largest country in Western Europe with 65 millions Norway is with her 4.1 million one of the smallest. Equally, there are far more titles on sale and subject to readership surveying in Germany than in Norway. We survey today 34 titles and it is likely that almost everybody will 'ever' (ie at least once in her or his lifetime) have read each of those 34 titles. The conclusion is that a general filter just translated from the German one would not be any filter at all in Norway.

Why then filter backwards one year – or, as phrased, 12 months? Because it is a convenient period and the longer backwards we took the period the less effective the general filter would be as a filter. For each publication passing the general filter there would be two questions to ask and thus there would be higher interview costs involved, so it is also an economic problem.

Let us then look at the special filter used in Germany but completely excluded from the Norwegian questionnaire. The reason for this is that firstly, we found it too inconvenient to filter at two stages and for the latter omnibus questions we did not want to be too educative to the respondents, in the sense that they might discover that the smaller number of publications they would let pass the filters, the fewer questions they would be asked. Such 'educational' activities could affect the competitive MMI position for its omnibus system.

Without going into depths of the discussion and the argumentation involved I will, however, not hide that filtering is subject to current discussion between 'Norsk Mediesentral' and MMI.

The questionnaire technique used for the Regional Readership Surveys is identical, with the exception that the period in the general filter is stated as 'last two months'. On this filter period there has not been any discussion – so far.

The questionnaire aids

For the questionnaire two aids are used:

(1) a *questionnaire booklet* stating to each respondent the alternative answering possibilities of the media and demographic questions. The purpose of this booklet is to

aid the speed of interviewing and secure answers of the type we want. For example, when we ask respondents for their last visit to the cinema we are interested to know whether it took place in certain periods backwards, not whether it was last Wednesday or Thursday or whether it was to the 7 pm or the 9 pm performance.

(2) A set of *masthead cards*.

Again, without going into details I will not hide that there is a discussion going on as to those cards between 'Norsk Mediesentral' and MMI, as some of the media subscribers do not agree to the proportionate format indication on the front page of the cards.

Those two aids are worked out to 'match' each other as the back page of the cards is coloured in accordance with the issue frequency such as yellow for monthlies; green for bi-monthlies; blue for weeklies; red for dailies (no Sunday newspapers are issued in Norway).

In the questionnaire book those pages applicable only for one group of publications according to issue frequency carry the same colour, while those used commonly are white.

Special questionnaire batteries

Apart from the media questions, just described, included in the interviewing each month we have included a set of special batteries of general marketing interest or of an experimental nature. Those special batteries include areas of enquiry such as purchasing habits, possession of long-term consumer goods, interests, life style and 'love story' (connotation between medium and reader).

It is not necessary to collect 12,000 interviews in order to clarify those areas of enquiry and, furthermore, it would be silly to conduct experiments on such a large scale of interviews. Those special batteries are therefore included in two to four months each year, thus allowing for a large number of topics to be covered.

Another point is that it is not necessarily the same topics one should cover every year. For example, once purchasing habits are clarified they are not likely to change substantially over the next two to three years. However, the long, recent period of negotiations on the establishment of the new syndicated body, 'Norsk Mediesentral', has unfortunately held up discussion on how to use those special questionnaire batteries. Up to now they have mainly, and probably as a consequence of the earlier advertising agency dominance over the syndicated body, been used for marketing purposes. Personally, I foresee a development where those batteries are used to a larger extent for the benefit of media editorial staff and media marketing departments.

The choice of field institute

In Norway, the syndicated bodies have never had command over any master sample or field interview force. As

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TABLE 2
Comparison of coverage under 'old' system (1978) and 'new' system (1979)

	Women			Men		
	1978 %	1979 %	Index	1978 %	1979 %	Index
General magazines						
Familien	13.7	15.2	111	5.8	6.8	117
Allers	30.2	38.7	128	19.2	26.5	138
Hjemmet	38.3	50.1	131	22.8	35.3	155
Norsk Ukeblad	34.7	43.1	124	21.1	31.1	147
Women's magazines						
KK	10.8	16.1	149	2.6	5.2	200
Det Nye	12.2	18.2	149	4.7	10.8	230
Mitt Liv	5.8	7.0	121	1.4	2.9	207
Romantikk	3.5	6.0	171	1.0	1.5	150
Men's magazines						
Alle Menn	2.8	4.9	175	16.4	16.8	102
Vi Menn	4.7	7.4	157	21.5	22.4	104
Pictorial						
Nå	3.7	9.5	257	6.7	12.4	185
Special magazines						
Alt om Mat	9.0	10.4	116	2.9	5.5	190
Foreldre & Barn	4.4	6.8	155	1.9	3.2	168
Motor	9.5	20.2	213	27.2	38.0	140
Nye Bonytt	7.3	11.6	159	6.3	10.4	165
Miscellaneous						
Det Beste	16.4	20.3	124	22.3	24.2	109
Vårt Blad	8.7	13.9	160	8.2	14.9	182
Donald Duck	12.0	21.7	181	14.0	25.0	179
Farmand	1.6	3.2	200	4.5	7.1	158
Programbladet	9.5	9.5	100	10.1	10.6	105

mentioned earlier, up to 1978 Norges Markedsdata a.s. acted as field institute, but since the innovations of MMI during the negotiations caused the survey after 1978 to be mainly an MMI-design it was of course natural for the syndicated body to ask MMI to undertake sampling, fieldwork and tabulation for the future.

How were the results affected by the changes?

The substantial changes in the survey in 1978 concerning mainly the questionnaire and the choice of field institute could of course be expected to influence the results, and so they did, in some cases substantially.

A total of 20 magazines were included both in the survey reported in 1978 according to the 'old' system

and in the 1979 survey reported according to the 'new' system in such a way that results can be compared; such a comparison is given in **Table 2**.

We see that with one exception all 20 magazines increased their coverage rate – the exception being *Programbladet* for women. It can thus be concluded that the new techniques registered more readers. The reason for the *status quo* for *Programbladet* for women is probably one of confusion, as *Programbladet* was earlier claimed by persons having read the weekly TV and radio supplement of the largest newspaper, *Aftenposten*: by changing to a technique likely to minimise confusion. *Programbladet* should in fact have declined in coverage and accordingly also this magazine gained in readership terms. For the sake of good order I can add that the

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Government Broadcasting Company which is the publisher of *Programbladet* is in agreement with this statement.

If all magazines had raised their coverage with the same ratio we could expect only a minimum of reactions. This was not the case! As you will see from the index columns different types of magazines or even magazines within the same group did not increase their coverage with the same ratio - and so we expected a lot of reactions.

We got some, but relatively few, and those can be said to be quite sober approaches. Why did that happen? Presumably because simultaneously with the survey syndication we had got the media qualification requirement increased, and improved education and activities in the field of courses and seminars: this led to a circle of media data users with a higher qualitative level. We had obtained a good media milieu and could in a friendly atmosphere discuss the problems as they arose.

Generally, the magazines with relatively small circulations gained more than those with relatively large circulations. We believe the reason for this is that without aids, or with relatively simple aids, respondents tend, anyway, to remember their reading of larger magazines but also tend to forget the smaller ones.

The ratio of increase among smaller versus larger circulation magazines has a parallel tendency in the fact that women's magazines increased more among men than among women - and men's magazines more among women than among men. Among the women the most 'girly' of the two men's magazines increased most; did the new questionnaire technique make it more fashionable for girls to look at other girls in the nude and to read more about sex? We do not know, but speaking more seriously: Is our technique better in the sense of minimising the prestige aspect which makes it more fashionable to read some types of publications than others?

We find the same tendency among special magazines. *Alt om Mat* is a magazine concerning food and therefore traditionally linked with female readership, and here it has a higher increase among men than among women. *Motor* is a motorist magazine and thus traditionally biased to male readership, and its increase is higher among women than among men.

And finally *Nå*, at that time the only pictorial magazine in Norway. It is on top in increase terms for women and close to the top for men. We take this as a sign that the old questionnaire technique was not able to register readership of pictorials properly, and that the new technique corrects the former injustice to this magazine.

The end of the *Nå* story is that when the advertisement manager wanted to take advantage of the new figures and raise his insertion rates the Government

introduced a very strong ban on price increases. He, however, immediately changed his strategy and achieved a long period with the lowest costs per '000 in the country, using this opportunity to secure new (and now faithful) advertisers in the magazine.

The reasons for the changed figures

As the sampling methodology of MMI did not differ substantially from that of Norges Markedsdata a.s. we believe that the reasons for the developments from 1978 to 1979 can be summarised as follows:

(a) circulation developments.

Circulation developments must be mentioned because almost all the magazines mentioned in the table increased their circulation from 1978 to 1979 (as they did in the years before 1978, and also after 1979). Circulation influence is possibly the reason for the higher ratio of increase for *Hjemmet* than for the other general magazines. Exactly at the time of the fieldwork according to the new techniques *Hjemmet* had a major circulation rise and became Norway's largest magazine in both circulation and readership terms.

(b) contractor effect

You cannot exclude a contractor effect created by the change of institute from Norges Markedsdata a.s. to MMI, but we do not know of such contractor effect and MMI has always (rather modestly) denied its existence.

(c) the change of questionnaire technique

There can be no doubt of an effect from the change of questionnaire technique and the introduction of mast-head cards. And in our belief it is so important that circulation developments and contractor effect are negligible.

THE WAY AHEAD

I have mentioned some of the points under current discussion in Norwegian circles and between 'Norsk Mediesentral' and MMI. However, we feel that after all we have now got a well advanced media survey system, especially taking into account the small population and the equally small resources in both financial funds and qualified manpower; to those factors one should add the long distances over which the interviewers must travel to reach the scattered population, often over narrow and mountainous roads, covered with ice and snow for seven to nine months at a time. In addition, developments following the oil and gas finds in Norwegian waters have given a high cost economy.

Further steps must be taken in respect to the cost conditions in both relative and absolute terms. But another aspect must be taken into account. In almost all countries the National Readership Survey is the survey

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whose results enjoy the widest distribution in marketing circles, directly and indirectly. A consequence is a distribution to a circle of persons with very varying backgrounds in interest, education and experience in using market and media data.

From time to time we data producers are therefore faced with situations where the correct strategy is rather to secure intensive and proper usage of the data available than to produce more and more data for which the user circle is not yet ripe. Nobody will wonder that we have felt ourselves in this situation since the comprehensive changes in our National Readership Survey less than three years ago. Another point here is that almost at the same time as the start of the new survey, long and comprehensive negotiations on the syndicated body organisation began; sometimes the situation in the negotiations caused uncertainty as to the final results. Under those conditions it has not been easy to start serious considerations on further progress.

Now the new body, 'Norsk Mediesentral' has finally got its secretary from early January this year, and after a preparatory period it is to be hoped that new initiatives can be made.

INDEX OF ABBREVIATIONS

ARF Autoriserte Reklamebyråers Forening (Association of Norwegian Recognised Advertising Agencies).
DnFF Den norske Fagpresses Forening (Association of

Norwegian Trade, Technical and Professional Press).
EMRO European Media Research Organisations – also designated 'Club Dubois'.

ESOMAR European Society of Opinion Surveys and Marketing Research.

IFM Instituttet for Markedsføring (Institute of Marketing – the Norwegian equivalent of IPA). IFM is owned by ARF and IFM's Mediasentral was the syndicated body for media research during the period 1972–80.

IPA Institute of Practitioners in Advertising.

MMI Markeds- & Mediainstituttet A/S, the largest market research institute in Norway for consumer-oriented research and has since 1978 been responsible for sampling, fieldwork and tabulation of the National Readership Survey and conducted the Regional Readership Surveys 1980 as its own enterprise.

NAF Norske Annonserers Forening (Association of Norwegian Advertisers). From 1980 AF = Annonserforeningen.

NAL Norske Avisers Landsforbund (Federation of Norwegian Newspapers).

Norsk Mediesentral The syndicated body for media research founded 1980 with the purpose to succeed IFM's Mediasentral.

NU Norsk Ukepresse (Association of Norwegian Magazine Press).

The different Norwegian organisations mentioned are all members of their respective international organisations.