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1.2 THE ROLLING MEDIA ANALYSIS

Austria has a great tradition in social and marketing research - just consider Paul Lazarsfeld and others. But can media research in such a small country be of any interest?

It can, very well. First of all, thinking is not a matter of topology; secondly, there is a very powerful reason for good and innovative research in a small country. The smaller the country, the more difficult is the selling of products and the more marketing people must know what they are doing and have efficient tools.

As a result, in our small country of six million adults, with hardly more than 15 relevant newspapers, 30 magazines, three radio and two television stations as advertising vehicles, we have four large media studies:

- the 'normal' Media Analysis (MA)

- the television-supported media study (Optima)

- the Austrian Consumer Analysis (ÖVA)

- the Rolling Media Analysis (RollMa).

All are based on sample sizes of 6,000 to 12,000 interviews.

The Media Analysis, a pure print measurement of readership, is conducted every other year. The method has stayed unchanged since its beginning in 1964.

In the intervening years the Austrian Consumer Analysis appears, a market/media study (like the German AWA) which covers about 300 markets in addition to all media. The Consumer Analysis obviously gives more input for media schedules.

The television-supported study concentrates on TV figures, ascertained verbally, not by meter.

The Rolling Media Analysis is certainly the most modern media study, and as far as we know the first of its kind in the world.

The rolling idea stems from American research on voting habits, where the latest four weeks are added up and the fifth week back is cut off.

We transferred this rolling system to media research, because this method gives very quick and continuous media data on a large statistical basis.

Every month we conduct 1,500 interviews - as we would normally do for our media studies. These 1,500 interviews are fully representative of the adult population. They are spread over the whole month, with an equal rate for each day of the week.

These monthly waves make it possible to cumulate as many months as one likes. We decided to cumulate four months, to give 6,000 interviews. This is a convention which fits into Austrian media thinking. When the new month is added, the fifth month back is taken out. **(Chart 1)**

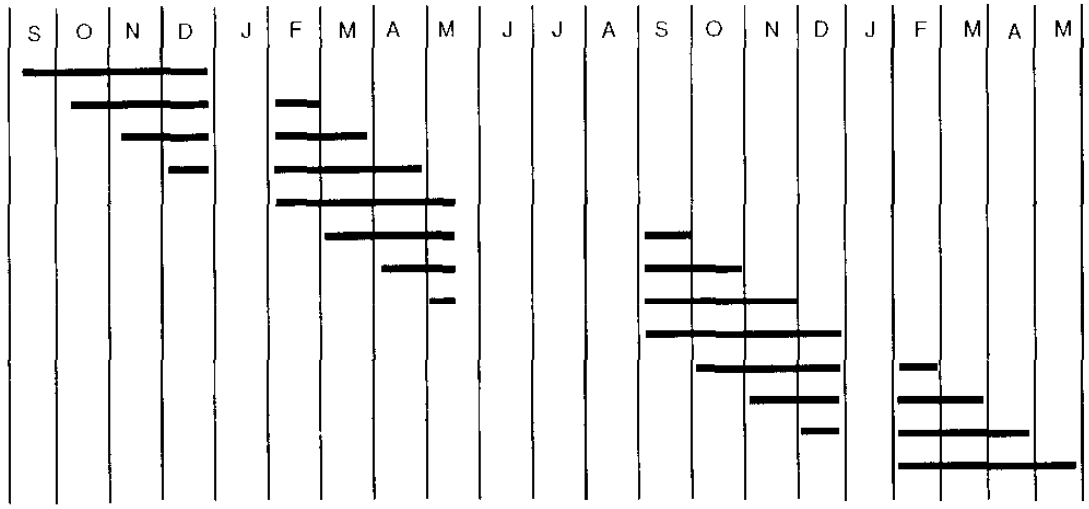
By convention we do not measure in January and in the three summer months (media use is said to be untypical in these months).

Every month the media data are published for our clients, which are almost all the Austrian publishing companies and quite a number of advertising agencies and advertisers.

Every report consists of three months' 'old' data and one month's new data. This floating average system, which we call the rolling system, avoids drastic changes from month to month, but over time developments can very well be observed.

An example of the figures as reported each month is given in **Chart 2**.

CHART 1
Monthly waves



In December and May the four-month cycle leads to an Autumn report (September-December) and a Spring report (February-May), which we publish in more detail.

These Autumn and Spring reports are the bases for media schedules. With this very fast instrument and its up-to-date data, planning with yearly data has almost come to an end.

The main aspect of RollMa, however, is other information: brand measurement. In the same interview, the spontaneous awareness of 400 brands for 40 product fields is measured ("when you think of mineral water, which brands come to your mind?"). This measurement is done bi-monthly: 20 product fields in September, November, February, etc, the other 20 product fields in October, December, March, etc.

The brand data are not cumulated but taken month by month separately. They show the movement of the brand awareness in the population, by the target group (which is also covered) and, of course, by the media used for advertising. Therefore, these brand measurements are a valuable tool for checking on advertising effectiveness.

EXAMPLE: KITCHEN FURNITURE

38% of the Austrian population mentioned Brand A spontaneously in September. Then the brand advertised in the magazine *Brigitte*, in Radio and on TV. After the campaign in November, brand awareness rose to 41%. Within the readership of *Brigitte*, the brand awareness of this brand rose by 14%. (The relatively high recall rates in other print media result from high reading correlations.)

Among the users of Radio and TV the brand awareness did not rise as much as in *Brigitte*, although 80% of the money went into the audio-visual media.

These brand-measurements show the effectiveness of individual media for various products and/or brands. As this is not our topic here, we will not go further into detail on this aspect of our RollMa; rather, we would point out the advantages of the Rolling Media Analysis for readership measurements.

CHART 2
IMAS-RollMa 1984/85 Periodicals: Austrian population aged 16 and over (n=6,000)

	1984			1984/85				
	April May Sept. Oct. %	May Sept. Oct. Nov. %	Sept. Oct. Nov. Dec. %	Oct. Nov. Dec. Feb. %	Nov. Dec. Feb. March %	Dec. Feb. March April %	Feb. March April May %	
Average Issue Readership								
Bunte	9.9	10.4	11.0	10.6				
Hör zu	8.5	9.2	9.6	9.7				
Das Beste	13.5	12.3	11.6	11.3				
Stern	5.1	5.4	5.5	5.4				
Quick	4.8	4.8	5.0	4.9				
Neue Revue	5.5	5.8	6.2	6.3				
Profil	5.6	5.7	5.0	5.6				
Trend	5.8	5.9	6.1	6.0				
Wochenpresse	2.4	2.8	3.0	3.1				
Basta	5.7	6.0	6.2	6.0				
Wiener	4.4	5.3	5.2	5.1				
Gewinn	2.5	2.8	2.9	2.6				
Brigitte	6.7	6.5	6.4	6.3				
Freundin	6.3	6.2	6.0	6.0				
Für Sie	6.7	6.6	6.2	6.0				
Neue Frau	2.5	2.3	2.4	2.3				
Welt der Frau	6.0	5.9	6.2	6.3				
Neue Ill. Wochenschau	2.2	2.2	2.4	2.4				
Burda Moden	12.7	12.4	12.1	11.8				
Neue Mode	6.9	6.9	6.7	6.6				

THE ADVANTAGE OF CONTINUOUS MEDIA DATA

(1) Reader development over time/ seasonal changes

- Checking editorial success: did a certain story, series bring more readers? (How many? Whom? Did they stay with the title?)

- Checking the effect of the medium's own advertising. (Did it bring more readers? Whom? Did they stay?)

- Watch seasonal movements like Summer time, reading and TV-viewing behaviour; like car titles increasing in Spring; like newspapers increase during sales, etc.

- And generally observe growth and decrease - even if it hurts.

Chart 4 gives some examples:

Medium A used to have a readership level of just around 4%. It started advertising, with a total of 2.1 million Austrian schillings, spread over the months of November, December, February.

Immediately the readership grew. This is normal. But what is important is that the readership stayed at the high level, which means that the newly-

CHART 3
Brand awareness of kitchen furniture **IMAS-ROLLMA**

		Brand awareness September (n=1500) %	*Brand awareness November (n=1500)* %	*Diff.* %
Total population		38	41	+ 3
Among average issue readers of				
Profil		47	46	- 1
Trend		41	48	+ 7
Basta		41	46	+ 5
Freizeit Revue		43	45	+ 2
Bunte		42	44	+ 2
Hör Zu		43	46	+ 3
Eltern		41	51	+10
Brigitte	Advertising	48	62	+14
Freundin		45	50	+ 5
Für Sie		41	48	+ 7
Schöner Wohnen		45	46	+ 1
ORF Nachlese		39	38	- 1
Radio Ö-3 7.00-7.30	Advertising	38	47	+ 9
TV FS-1 20.00-20.15	Advertising	36	42	+ 6

CHART 4
Changes in reader per issue over time/seasonal changes **IMAS-ROLLMA**

	Effects of own advertising				*Seasonal effects*		
	Classical advertising		*Free issues to all households*		*Car titles rise in Spring*		*Winter correlation with TV-magazine*
	Medium A %		*Medium B* %		*Medium C* %	*Medium D* %	*Medium E* %
September	3.9	ad spend:	41.5	500,000 free	15.5	4.2	8.5
October	4.1		38.1	issues	16.4	4.4	8.6
November	4.4	0.6 m.sch.	35.8		17.5	4.9	8.9
December	4.5	1.0 m.sch.	35.0		17.8	4.8	8.7
February	4.3	0.5 m.sch.	35.8		18.2	5.1	8.7
March	4.3		36.3		18.2	5.0	8.8
April	4.5		37.5		18.3	5.0	8.6
May	4.6		35.6		18.3	5.4	8.4

gained readers were kept. This is not necessarily so, as the case of Medium B shows.

Medium B a regional weekly, gives free issues to all 500,000 households in its area. The readership goes up tremendously in the Autumn, but the additional readers are not kept, the reading level soon dropping to its normal level of around 35%.

Medium C & D are car titles. For years now we have found the same reading pattern: readership raises from Autumn to Spring. Every Autumn it drops, and over the Winter it builds up again. The reason is the curve of car interest, which raises in Winter, when driving is more difficult and cumulates in Spring, when most new cars are bought.

Medium E also shows a seasonal effect, which occurs in all TV magazines. Their readership increases slightly in the Winter, when people watch more television.

(2) Measuring changes in 'appearance'

- What does a cover title bring (for monthlies) in terms of readers?

- What does a new logo bring?

- What happens to the readership if a title changes it size?

- What happens if a newspaper introduces colour printing?

- What happens if the frequency of publication changes, ie from fortnightly to monthly?

- What happens if the selling price is raised?

etc.

Examples are given in **Chart 5:**

Medium F changed from a large to a small format (which is a 'hot' topic in Austria, since the main newspaper, with

CHART 5
Changes in reader per issue due to changes in 'appearance' **IMAS-ROLLMA**

	Change in size in September (newspaper from large to small)	*double issue (2 issues in October instead of one)*	*Colour printing in newspaper since April*
	Medium F %	*Medium G* %	*Medium H* %
September	22.1	5	16.6
October	22.9	7	17.4
November	26.1	6	17.4
December	26.1		17.8
February	26.6	5	17.0
March	27.0	5	16.9
April	27.0	5	17.0 — no effect
May	27.9	5	16.8 — so far

43% readership is small in size). The change to the small format immediately led to more readers, which stayed with the paper. (Now, two years later, the readership is around 30%.)

Medium G is a monthly business magazine: in a special situation it issued a second copy after two weeks, so that for one month this magazine was a fortnightly magazine.

As can easily be seen, readership went up enormously, but did not stay. So an additional issue does not seem to be a way to gain readers.

Medium H is a newspaper which started colour printing in April. First measurements did not show any effect on readership. Later measurements also did not show any gain. This very expensive investment apparently does not bring more readers. (This may depend on the competitive situation which was unfavourable for Medium H.)

(3) New media can be picked up at any time

- size of readership and rate of growth

- structure of readers

- effects of new titles onto old ones

- watch cable and satellite television and its effect on viewing and reading habits. (See **Chart 6**)

RollMa is now into its fifth year. The long time series of readership and viewership development makes the instrument more useful than ever, since by now we can establish rules in the market, general seasonal effects, effects of election times, etc.

We are confident that this more effective system will be adapted soon in other countries, although - one should not hide this - it also shows negative developments.

CHART 6 **IMAS-ROLLMA**

Reader development of new titles

	Medium I %	*Medium J* %
September	10.1	3.8
October	10.0	4.1
November	10.4	4.4
December	10.4	4.6
February	11.0	4.5
March	11.5	4.5
April	11.7	4.5
May	11.9	4.2

Reader per issue - demographic structure - development over time

	New magazine: Total average issue readership = 100% *Sept.* %	*May* %	
Men	72	68	
Women	28	32	
	100	100	
16 - 29 years	32	30	
30 - 49 years	41	48	somewhat
50+ years	27	22	younger
	100	100	
Social class A	28	36	more upper
B	23	25	class
C	41	30	
D	8	8	
E	-	1	
	100	100	