

Jean-Louis LABORIE
T.M.P.R.
THE MEDIA PARTNERSHIP RESEARCH
PARIS -FRANCE

*Over and beyond just audience measurement
A reference survey - a new form of establishment survey*

SYNOPSIS

In France, as in many countries moreover, audience measurement surveys are based essentially on a media by media, or pairs of media approach.

The results obtained from these surveys, whatever their quality or accuracy, produce a piece by piece description of effective media presence, and juxtaposing the surveys gives rise to a bizarre panorama.

The user, in charge of advertising investment and responsible for determining the split by media cannot feel satisfied with this situation. He is deprived solid and unquestionable data based on multi-media research, and can only rely on his experience and intuition.

To overcome this deficiency, and to provide unity and coherence to overall media consumption, a working group bringing together agencies, advertisers, and media buying companies set up a daily multi-media reference survey. The true originality of the project lay in the approach decided upon.

The approach, without being completely new, was nevertheless a totally original application of a method perfected in the UK fifteen or so years ago. Over and beyond providing a description of media consumption, the survey provided information that was sufficiently accurate to constitute an irrefutable yardstick for judging objectively the value of audience surveys on a media by media basis.

Tests carried out in the autumn of 1990 provided the means of perfecting the questionnaire and the real full-scale survey will start in February.

Over and beyond just audience measurement
A reference survey - a new form of establishment survey

This paper describes the elaboration of this reference survey, its objective, the methods employed, and the use that will be made of it.

In conclusion, its possible extensions will be examined.

Genesis:

In France, several audience measurement tools are available and furnish for the large scale media accurate and regular evaluations of audiences:

- for press, an annual survey of 15000 people over 15, using face to face interviews and covering more than 130 magazines,
- for radio, a daily telephone survey of 75000 people per year over 15 based on their previous day's listening behaviours,
- for television, two push button audimeters (Sofres/Nielsen and Médiamétrie) provide daily results; in total more than 3000 households make these panels.

Such a collection might appear at first glance satisfactory and even the most demanding user might be expected to feel happy with it.

Why then question them and go against the stream by developing a new survey, yet another one, which clearly would be expensive? The answer lies in a simple, worrying triple observation:

First observation: analysis of these surveys brings to light the following findings:

- each person in France watches television 3 hours a day,
- each person in France listens to the radio more than two hours every day,
- and finally everyone spends more than an hour reading the press every day.

On top of these 6 hours spent on the media, we have to add time spent on travel and the unavoidable chores that nature imposes (sleeping for example) or that society at large demands (work). We are led thus to accept that over and above spending time with the various media, sleeping and working, our admirable fellow countrymen have given up doing anything else.

Common sense tells us that this isn't true. There is a clear suggestion of overlap and simultaneous consumption.

*Over and above just audience surveys
A reference survey*

These overlaps, this doing of several things at the same time is common-place: watching the TV whilst reading the paper, driving and listening to the radio. It's simple and obvious. But the variety of behaviour according to the diverse categories of population lead us to expect a priori that the scale and type of overlaps vary considerably: If we take an active senior manager and a 45 year old housewife whose children left the household some time ago, the roles of the TV, radio and press are surely different, and the opportunities to reach them differ considerably. Media consumption has therefore to be put in perspective to restore a coherent and realistic picture of their effective presence.

A second observation also leads to the need to develop a multi-media reference survey: every media specific surveys is biased, we all know it, in favour of people who use the media frequently: who gladly recruits a household that doesn't watch TV, or only occasionally, for a panel equipped with audimeters? Is the proportion of households with multiple equipment amongst panelists always, and effortlessly, representative of the true level of multiple equipment?

Varying and unequal difficulties in recruiting households or individuals for surveys lead inevitably and uncontrollably to biased panels. On what scale? What effect does it have on the results obtained? Does it lead to overestimating the audiences of some media and underestimating others? What is the impact of these phenomena from one category to another?

Only a media survey that treats all media on a strictly equal basis can provide the answers to these questions.

Third observation and not the least important: How can a media survey be evaluated? Apart from the usual very valid checks on the relevance of the sample and the quality of the field-work, how can we judge if the the audience registered doesn't pertain more to the way the question is formulated than to objective reality?

Sudden jumps in audience generated by modest changes to the way the question is formulated when surveying press readership for example, and also radio, have raised almost insoluble controversies because of the absence of yardsticks, reference points, yardsticks we can refer to.

Over and beyond just audience surveys
A reference survey

It was as a result of these three observations that the need to create a reference survey came into being - a permanent multi-media survey restoring coherence and rigour to effective media presence measurement. All media, without bias and without exception.

The aim of the reference survey :

The objective of the survey was from then on clear :

- provide users, as well as the media involved in the elaboration of the methodology, a certain number of "hard facts", that's to say indisputable data, onto which it would be necessary to lock all subsequent audience investigations, and calibrate "windows" of contact with each media.

- provide users with sufficient elements to undertake comparative evaluations of media or groups of media to provide a yardstick from which would develop surveys initiated by the media.

In fact, within the framework of the development of this reference survey, the media have had to undertake, in the work they will be expected to carry out by media or by group of media, to furnish the basic questions asked in the reference survey, in order to validate their involvement. This is a basic condition to get the CESP label ⁽¹⁾.

The basic principles are summed up thus :

The survey is multi-media and annual. It is carried out by the media as far as the collecting of information is concerned; the publication of the results only occurs for groups of media, as much for reasons of remaining within reasonable statistical and financial limits as for avoiding becoming a substitute for surveys carried out by the media themselves.

(1) Tripartite organisation representing the media, agencies and advertisers. The CESP is charged with checking and validating audience surveys and sometimes with carrying them out.

Over and beyond just audience surveys
A reference survey

Obviously the results of the survey are available to everyone, to users as well as to media belonging to the CESP, this in order to remain absolutely transparent.

The reference survey will be permanent, 365 days a year. It will be based on a **time-budget** type survey describing the day's activities so that contact with the media can be reinserted into their natural context. In order to be able to link the time of measurement with the facts observed, the survey will be based on the **day before**.

The interviewees will be asked about their activities which firstly will be arranged according to order then timed. Contacts with the media, whether they show up spontaneously or not will be studied with particular care, with an indication of the beginning and end of the contact and the extent of multi-media overlaps.

The questionnaire :

On this basis, the plan of the questionnaire takes the form of two major sections :

- one devoted to building up the previous day's activities - of which contact with the media.
- the second part is devoted to a more precise description of behaviour with regard to the media : press, radio, television and cinema.

As far as posters are concerned, the survey will be limited to the duration of movements recorded in the first section of the questionnaire : the duration of movements outside the home and the mode of transport used (on foot, by car, metro, bus...).

If we look at the two sections more closely, they look like this :

Activities the day before

There are two steps : selection of around fifty cards, each designating an activity, according to whether or not they were undertaken the day before. Amongst these activities will figure reading the press, watching the TV, listening to the radio, and, for posters the time spent outside the home.

Next, for activities undertaken the day before (every 5 minutes) : we will have these located over time, even if it is an approximation, for the main activities.

Each time an activity is compatible with a contact with the media (and obviously in the event of no media contact) we will detail parallel activities to see if there were any possible contacts with media.

The statement of contact with the media

In this more detailed collection of activities relating to media, we will note the following points :

- * global times for radio and TV.
- * visits to the cinema the day before, and the number of different issues; whether it's the first time the issue was read or the Nth; where it came from.

Testing the method :

- Several tests of the questionnaire took place by phases; using small samples.
- At the end of December the final questionnaire was prepared.
- During the tests, generally, the interviewers noticed that the questionnaire was more acceptable to active respondents, by men and during the week than by non-working, women and at the weekend.
- The duration of the interview was identical for men and women whatever the age of the person interviewed.
- On the other hand it varied according to the profession of the interviewee.

*Over and above just audience surveys
A reference survey*

. It was much longer for managers and professional people, average for office employees and workers (about 10 minutes)

. The interview was longer amongst non-working than amongst actives and when the interview took place during the week than at the wee-end.

As far as the actual "budget-time" part was concerned, the duration of the questionnaire was around 4(minutes.

Out of 64 activities listed, the average number of activities selected when the cards were sorted was around a third for all the sample interviewed.

The number of activities selected was higher for women than for men (25 and 20 respectively) as it was during the week compared with the weekend.

On average the number of activities mentioned not found on the list was 4.2 per person.

The majority of these non-listed activities were mentioned by active and non-working women. They concern essentially week-time activities of a humdrum kind.

Uses the survey will be put to :

When it is launched in February 91, this survey will provide in France for the first time a coherent picture of media consumption using an approach which does not overstate the importance of given media compared with other activities.

The analysis limited to a description of contact with media, or of a group of media all providing sufficient coverage to give results of statistical significance will provide a description by target group of the potential offered by each media in numbers of contacts and in duration of contact. The selection of a media mix will no longer rely just on experience and will enter the era of quantification. A second use will be the comparison media by media of these average

*Over and above just audience surveys
A reference survey*

volumes of daily consumption with those supplied by audience surveys and the setting up in the event of notable differences of appropriate correcting mechanisms.

The reference survey will thus provide, if not a ready-made media-planning ⁽²⁾ tool, at the very least the essential information to relativise the audiences one with another on an unquestionably sound basis.

Extensions :

The first extension of the reference survey will be geographical : putting it into operation in other European countries can be done without problem: none of the questions presents a translation problem; no problem of definitions will present an obstacle. On the face of it, it's the reference survey par excellence which will make it possible to compare, without waiting for hypothetical merging of points of view, contact with media from one end of Europe to the other.

The second extension concerns methodology : by bringing in complementary approaches, for example, by re-interviewing the sample a few weeks after the basic survey will make it possible to complete our knowledge of the media in several ways :

- media contact habits,
- buying or consumption behaviour,
- life styles,
- behavioural panel etc...

A source of coherence and rigour, this reference survey is in our view more than just the indispensable complement of existing measures: it's truly the hinge on which, in the future, all media research initiatives will hang.

(2) in the real sense of the term, that's to say a tool for defining the media mix and not media by media planning.