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READERSHIP MEASUREMENT THROUGH
TELEVISION PANELS.
A FIRST STEP TOWARDS INTEGRATION.

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READERSHIP MEASUREMENT THROUGH
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1. Introduction.

As in many countries, in the Netherlands readership measurements and television audience measurement are separated systems. Not only technically but also politically the two systems run parallel without links between them. The Summo Scanner measures readership by means of the FRY method using throughout the year a rolling sample of 37.000 telephone interviews (for technical details see several Dutch presentations on that subject, in particular those of Marion Appel and Costa Tchaoussoglou here in Hongkong). The Summo Scanner is controlled by the joint industry body SUMMO.

Television audience measurement are carried out by AGB Media on behalf of and mainly financed by NOS and STER as well as by the commercial television stations with an interest in the Dutch Market. Basically there is one relevant commercial station RTL 4 (in the Netherlands) and some smaller Pan European channels. This AGB 4900 people meter system is controlled by the audience measurement department of the NOS and its technical committee. The panel size consists of 700 homes; it will be expanded to 850 homes on the first of January 1991.

The Summo Scanner produces some limited information on television viewing. It mainly measures the opportunity to see the advertising blocks broadcast. This system failed to work satisfactorily due to the rising number of advertising blocks spread over 4 channels; consequently, Summo was looking for other means to calculate a rough measure of viewing habits which could be combined with reading probabilities.

Merging television data from this AGB source with the Summo data was one option to consider. This option was blocked politically for quite some time because of a dispute concerning "medium reach" vs "advertising reach".

Particularly STER strongly defended the position that multi media comparisons should be made on a media level as for the print media, and that comparing print media with the opportunity to see an advertising block does not represent the media level but the "advertising page" level.

This discussion is not new, as we all know. In most countries where any form of fusion between television data and readership data occurs, discussions have raged on this topic. In some countries therefore television viewing is defined in an atypical way. As one example I'd like to mention the use of the quarterhour around the advertising block to construct a kind of "medium contact". In countries like Germany and Switzerland this has or has been the case.

With the introduction of the commercial "foreign" channel RTL Veronique (now named RTL 4) the planning and buying of television airtime became liberalized to such a degree that media planners were forced to get interested in programme information rather than in advertising block information. This development brought along the opportunity to achieve a comparative measure on print vs television. This solution was preferred in favour of the time periods around an advertising block mentioned early.

Theoretically, programme content can be compared with editorial content of a magazine. To make comparisons practically possible, however a viewing probability has to be calculated for something that is comparable with "titles". The solution was to construct a "title" by combining all programmes that belong to the same programme type.

In order to gain time and to avoid discussion on data fusion, STER together with SUMMO decided to start an experiment using the AGB people meter panel resulting in an experimental multi media planning tape. After the experiment was conducted both parties would decide whether this experiment would be followed by real fusion and if so what steps would be necessary to bring the two systems more into harmony.

Technically the experiment was divided into three steps.

1. To question panel members on the reading of all Summo print media titles and to calculate reading probabilities.
2. To calculate viewing probabilities on programmes for the different programme types.
3. To experiment with this new media planning instrument to find out how useful it may be.

The project was controlled by a committee with members provided by SUMMO, STER and the audience research department of NOS.

2. Set up and technical details

In the spring of 1989, panelmembers were interviewed using a print media questionnaire.

This questionnaire comprised the classic "recency" questions on 83 Summo titles, namely:

- did you ever read
- did you read . . . the last day/week/month
- how many out of 6 do you read regularly.

Obviously the recency questions were preferred over the FRY-question because of the small sample size of the AGB television panel (approx. 1200 individuals of 13+). The FRY-questioning technique would not provide enough data to calculate any reading probability, except for the national dailies.

Original the intention was to combine these reading data with viewing data of the first two quarters of 1989.

However political discussions proceeded until autumn 1989; this obviously postponed the start of the project. In October of that year, RTL 4 (Veronique) started broadcasting, so the viewing data of the first two quarters (without RTL 4) were of no use for any media planning as they were based on the pre-RTL 4 periode.

The definite period to calculate viewing probabilities on, happened to be the first 3 months of 1990. This period can be seen as the first period that RTL 4 and the three Dutch networks more or less adjusted to their current market shares.

This is the historical reason why viewing data from the first quarter of 1990 were combined with reading data of 1989. This was accepted, due to the fact that reading is relatively stable over the whole of a year, while in this case viewing habits had changed dramatically. The advantage of a panel is, that data of different periods can be combined with each other. But panel turnover does also occur, causing a rather smallish sample for both data sets. So, in a small number of new households the reading data were gathered at a later stage resulting in a net sample of 1000 respondents.

The viewing probabilities were calculated for the existing programme categorization which comprises 36 categories (see appendix) such as: religious programmes, light Dutch sitcom series, serious foreign movies, popmusic, classical music, etc.

For each category the viewing probability per individual was calculated for four channels, and for each channel in four different time periods, i.e.:

daytime before 18.00 hour
18.00-20.00 hour
20.00-22.00 hour
22.00 and after

It can easily be shown that this results in $36 \times 4 \times 4 = 576$ viewing probabilities per individual.

The following calculation of a viewing probability for a programme categorie was used:

$$\frac{\text{viewing time over 13 weeks}}{\text{broadcasting time over 13 weeks}}$$

This is a simple and straight forward measure of the viewing probability that is also used in the Netherlands to calculate viewing probabilities of commercial airtime. The advantage of this measure is that it can easily be related to the average rating of that programme categorie in the same periode (in fact the calculation is the same).

The reading probabilities were calculated in the classical way, i.e. with the frequency question as a segmentation variable combined with sex.

3. Results

The results may be analyzed on the three levels mentioned earlier:

1. Comparison of readership figures with the Summo FRY results.
2. Discriminating power of viewing probabilities in relation to reading behaviour.
3. Overall usefulness of the multi media plannings tape.

Readership:

The reading probabilities of the 83 print titles were reduced to 49 titles by combining titles. This reduction was necessary because of the low penetration of smaller titles. Appendix two shows the complete list of the 49 titles and combinations of titles with average readership figures from both sources: the AGB television panel (n=1000) and the readership figure from a comparative SUMMO sample (n=37.000).

On face value the results look similar and when the reliability boundaries are calculated, (taking into account the different sample sizes) 16 out of 49 are outside the 5% confidence level.

Some remarkable differences call for a closer look. In the first place, a significantly higher readership figure occurs for Television guides throughout the television panel (76.5 vs 70.7). This can be explained by the historical fact that TV panel management is aimed, among other goals, at a minimum representation of the subscribership of each of the TV guides in the panel because of the connection between readership and broadcasting organization membership. This leads to a slightly higher representation of overall TV guide readership.

Other remarkable differences may be noted in two areas, namely the glossies (9.1 vs 14.0) and the men's magazines (2.9 vs 6.8). This particular difference can be explained by the fact that the interviews in the panel homes were held face-to-face by an interviewer known by the respondent, while the Summo interviews were conducted by telephone by an unknown interviewer, which may result in less evasive answers on this point.

Other differences than those mentioned are quite small and can not be explained easily other than by sample differences.

The overall comparison may be satisfying but we have to bear in mind that no further targetgroup analyses has been done so far. On the other hand, at this stage no special weighting has been performed between the two samples, which could possibly close eventual gaps.

Discriminatory power:

To show the discriminatory power of the viewing probabilities of the defined programme categories in relation to the reading behaviour some profile analyses were done.

For a selection of programme types and time periods over one or more channels the viewership profiles are shown on three simple demographics: sex, age and education.

To show up the differences more clearly, viewership of programmes is divided into three groups:

- nil viewing (probability close to 0.00)
- light viewership (probability less than average but higher than 0.00)
- high viewership (probability more than average).

If we rank the average readership of all print titles for each group some expected (or unexpected) relations may be noted.

First example:

The selected programme category is: small scale games productions shows during day-time on the two popular channels Netherland 2 and RTL 4 (e.g. Wheel of Fortune etc.).

The analyses show that respondents with a more than average probability can be found in the age group of 13-19 year old. It's no wonder that youth magazines rank high amongst print titles in this group.

Of course we can analyse the data vice versa. Selecting some combination of print titles the sample can be divided into three groups:

- nil readers (reading probability 0.00 or close)
- less than average reading (reading probability less than average but higher than 0.00)
- more than average reading (reading probability more than average).

For each of the three groups of readers we can rank their favourite programme types.

Second example:

We select two newspapers characterized as quality papers with a readership of highly educated people: NRC Handelsblad and De Volkskrant.

Profile analyses based on the AGB television panel show indeed a readership of highly educated people in the age range of 30-55 year old.

If we rank the viewership of programme types of the more than average reading group, especially of those programmes broadcasted after 22.00 hours on Netherlands 3, we see that "art-programmes" and "experimental television" reaches a viewership almost four times as high as the average for those programmes.

Third example:

If we select the readers of current affairs weeklies (comparable with Time and Newsweek) we find the well known profile of mainly highly educated men in the age group of 35-49. Ranking their viewership on the commercial channel RTL 4 in prime time, shows clearly that they select this channel especially for sports, preferably soccer games. It also shows that they have an extremely low opportunity to see the many game shows so popular with others. These magazines can act as a compensating medium for gaps in television coverage for certain products for this target group.

These three examples are not intended to show the full potential of this "multi media probability tape". It is merely to show the logic behind it, so that media planners can work out how to compensate television mediaplans with print or vice versa (the latter is not unusual in the Netherlands). It provides the only link between readership data and real time television viewing preference.

4. What now?

In spite of all technical and particularly political problems, the multi media planning tape is now, in February 1991, available for use to the majority of Dutch agencies. This is more than 6 months later than planned, so the field experiences we promised to present to you in this paper are only just beginning to become available.

As has been stated in the introduction this experimental study acted as a liaison between two parties in the Dutch political media scene: SUMMO as the readership research organization and STER as one of the main stays of the AGB television research operation. It could be seen as the first born child of two partners as yet unmarried. So far, it shows all the hallmarks of such a child. One partner hoped that the child would force the other partner into marriage but was nevertheless rejected. The other partner felt blackmailed into marriage and consequently up to now, doesn't really want to adopt the child. The author was the midwife assisting with the birth and by now is probably the only one available to raise the baby to childhood. Theoretically there are three ways to proceed.

1. This will be the only child of these two parents, and that's that.
2. The media planning aunts and uncles in the market place will adopt the child and with their help it will grow to maturity in spite of its parents.
3. It may even be possible that this first stage will lead to real maturity by way of fusing both data sets, bringing the parents to some kind of "living apart together".

Both parents have to be convinced of this. It means both parents have to see that the media planning uncles and aunts want the child very badly.

Appendix I

1. Religious programmes
2. Programmes about Art
3. Other serious informational programmes
4. News casts
5. Current affairs programmes
6. News casts for children
7. Sports magazines
8. News for minorities
9. Talk shows
10. Other mixed informational programmes
11. Educational programmes
12. Documentaries
13. Educational quizz
14. Light movies, Dutch origin
15. Light Dutch series(situational comedy)
16. Light movies, foreign origin
17. Light foreign series (situational comedy)
18. Serious movies, Dutch origin
19. Serious drama, Dutch origin
20. Serious foreign movies
21. Serious foreign drama
22. Children's programmes
23. Teenage programmes
24. Soccer matches
25. Other sporting events
26. Comedy/ satirical programmes
27. Entertainment for children
28. Popular music
29. Classical music
30. Large scale games productions
31. Small scale games productions
32. Other shows and entertainment
33. Experimental programmes
34. Opera, Theater, Ballet
35. Modern classical music
36. Religious music

Appendix II

<u>Daily and weekly titles</u>	AGB tele- vision panel	Average reader- ship in % <u>SUMMO</u>
1. Algemeen Dagblad	12.7	12.1
2. NRC Handelsblad	4.5	4.8
3. Het Parool/Trouw/De Volkskrant	10.5	11.3
4. De Telegraaf	19.4	18.0
5. De Volkskrant	6.3	7.0
6. Alle dagbladen, incl. Nederlands Dagblad, Reformatorisch Dagblad en De Waarheid	40.6	40.1
7. NRC Handelsblad en Het Financieële Dagblad	5.0	6.1
8. AVRO-bode/TeleVizier	18.0	16.4
9. Studio (KRO)	5.9	5.2
10. Mikro (KRO)	7.3	6.3
11. NCRV-gids	9.3	8.3
12. TROS-kompas	12.6	13.6
13. VARA TV-Magazine	10.5	8.8
14. Veronica-omroepblad	16.0	21.1 *
15. Alle RTV-bladen	76.5	70.7 *
16. RTV-combinatie, inclusief Mikro	32.1	21.8 *
17. Elsevier	5.5	5.5
18. Alle opiniebladen, inclusief Opzij	10.3	10.5
19. Aktueel	9.4	11.2
20. Nieuwe Revu	17.2	16.7
21. Panorama	19.0	20.6
22. Alle familiebladen	27.0	31.6 *
23. Libelle	27.4	28.0
24. Margriet	20.8	23.3
25. Privé	19.7	18.7
26. Story	19.6	19.0
27. Weekend	11.9	10.2
28. Privé/Story/Weekend	28.0	29.2
29. Libelle/Margriet/Flair/Viva	37.4	40.0
30. Donald Duck	12.4	14.7
31. Donald Duck/Sjors & Sjimmie/Kuifje	13.6	17.0 *
32. Voetbal International	5.7	9.8 *
33. Voetbalbladen	7.4	12.0 *
34. Intermediair/Fem/Carriere/Management Team	6.9	9.6 *
35. Het Beste	7.9	10.2
36. De Kampioen	22.9	33.4 *
37. Kampeer & Caravankampioen	4.7	4.7
38. Alle ANWB-bladen, inclusief Autokampioen, Waterkampioen en Reizen	31.1	41.2 *
39. Muziek Express/Popfoto/Paperclip/Oor	5.2	8.4 *
40. Sport International/Tennis Magazine/ Surfmagazine/Hockey/Magazine/Ski Magazine	6.5	8.8
41. Ariadne/Knip/Marion/Sandra	13.1	15.9
42. Doe-het-zelf/Eigen Huis & Interieur/VT Wonen	18.7	16.9

Continue appendix II

43. Avenue/Cosmopolitan/Elegance/ Nouveau/Avant Garde	9.1	14.0 *
44. Playboy/Penthouse	2.9	6.8 *
45. Kinderen/Ouders van Nu/Wij	7.0	12.0 *
46. Autokampioen	7.2	10.2 *
47. Autovisie	2.1	3.8 *
48. Management Team	3.2	3.6
49. Tip/Allerhande	23.3	26.5

*) significant differences