

A NEW APPROACH TO THE ROLE OF THE PRESS IN MULTIMEDIA STRATEGY AS SHOWN BY THE CESP MULTI-MEDIA TIME-BUDGET SURVEY

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1. MULTI-MEDIA BUDGET TIME STUDY

The CESP carried out a Multi-media Time-Budget Survey from April 1991 to April 1992.

The survey, following lengthy discussions with the CESP's various partners (agencies, advertisers, media buyers and representatives), corresponded to a demand for a means of establishing media strategies.

Two points are worthy of note:

The first is that in France, as in many other countries, most audience surveys are monomedia and do not allow direct comparisons between the various media to be made.

The second is that media consumption is an everyday affair. It is therefore useful to study individuals' exposure to the various media by examining this as part of daily activities instead of dealing with it as an isolated phenomenon.

Consequently, the Multi-Media Time-Budget Survey was not designed as an audience survey but as a study of individual behaviour towards the media based upon yesterday's time-budget.

The survey went far beyond traditional audience surveys. It is a means of acquiring general knowledge on media consumption and the context it occurs in.

The goals were as follows:

- i To estimate the total number of contacts individuals have with each of the media (radio, press, TV and outdoor advertising) as well as the amount of time spent on it yesterday.
- ii To enable the various media investigated to be compared according to the same criteria in a single questionnaire.

1.1 Methodology

The methodology was finalized after a series of qualitative and quantitative tests.

The survey was carried out in the field from 15 April 1991 to 15 April 1992.

The total sample of 18,040 persons ranging from 15 years and over was divided up into twelve monthly waves of 1500 individuals over the 365 days the survey lasted; i.e. approximately 50 interviews per day.

Sample breakdown per dated day was respected in order to obtain homogeneous social representation for each day of the week during each wave.

To ensure the survey represented individual behaviour as realistically as possible, a specific sample of holiday-makers was integrated into the summer waves between 15 July and 15 September 1991.

The interviews were carried out face to face at the interviewee's homes.

The mean questionnaire duration was 45 minutes.

1.2 Questionnaire

The questionnaire included four main sections:

Part 1 classified yesterday activities according to an hourly grid of twenty-four hours divided up into five-minute slots starting at 3 am.

To assist interviewees remember their yesterday time-budget, a list of 63 activities - including reading the papers, listening to the radio, watching television, etc. - was offered at the start of interview.

Part 2 was reserved for media consumption *per se*. For each contact with any of the media, the interviewee was to state which one was involved (title of newspaper or magazine read, radio station listened to, or channel watched).

This part was spontaneous with no memory-joggers.

The questionnaire design made it possible to know whether the activity took place at home, whilst travelling, or away from home.

Exposure to outdoor advertising was evaluated according to time spent travelling.

Part 3 was devoted to reading the press (hints based on titles already mentioned or general hints for those having stated no reading yesterday), followed by specific qualitative questions as to the reading itself (number of different publications read, proportion of pages read, and source of copy).

Needless to say, because of the sheer size of the sample and the number of yesterday reading titles, the results were not assessed title by title but as groups.

The CESP did not authorize processing for titles quoted less than 300 times.

Lastly, **part 4** dealt with demographics and the corresponding appliances in the home.

1.3 Main results

First of all, the Multi-Media Time-Budget Survey enables the time spent each day in media consumption to be measured and compared with other activities, and the mean time devoted to each media to be analyzed for the population as a whole and per target.

i Breakdown of time spent yesterday according to main daily activities.

The mean duration of activities for the population as a whole and for the active population was as follows:

	Total Population		Active Population	
Daily Total	1.400mn	100%	1.440mn	100%
Sleeping and resting	550.6	38.2	525.6	36.5
Leisure, shopping and similar excursion	225.7	15.7	215.5	15.0
Media Contact*	164.5	11.4	136.5	9.5
Eating	149.6	10.4	144.0	10.0
Working	128.7	8.9	204.7	14.2
Child-rearing and household tasks	107.1	7.4	89.8	6.2
Travel	69.6	4.8	80.5	5.6
Hygiene	31.8	2.2	31.3	2.2
Other activities	12.3	0.9	12.1	0.8

* It should be noted that media contact is considered as a main activity in the above table. The stated duration does not therefore represent the entire time spent in media consumption since it often accompanied another activity.

Excluding work, this breakdown of time spent at each activity varied little between an average day of the week and the weekend. On the other hand, the mean duration of activities did vary noticeably according to social category.

It may be clearly seen that the active population devoted less time to the media as main activity than the population as a whole (136.5 min *vs.* 164.5 min).

ii Mean total time devoted to the media per day

The total duration of media consumption as main or secondary activity was 6 hours 14 minutes per day (374 min).

This can be broken down thus:

TV	(3 H 34)	213.7 minutes
Radio	(2 H 03)	122.5 minutes
Press		37.5 minutes
of which:	daily papers	14.5 minutes
	Magazines	23.0 minutes

Duration of press readership according to main social categories: (mean duration expressed as minutes calculated for the entire population)

Personal status:

Men	41.3
Women	34.0
Housewives	34.5
Housewives < 50 yrs	28.9
Working women	30.6

Age:

15 to 24 years	28.4
25 to 34 years	29.9
35 to 49 years	35.3
50 to 64 years	42.7
65 years +	52.3

Interviewee's profession:

Farmer	29.1
Small business owner	27.8
Upper management/liberal professions	48.1
Middle management/highly-skilled workers	38.2
Employees	33.1
Skilled workers	29.9
Unskilled workers	25.3
Unemployed	41.9

Level of education:

Primary	37.8
Secondary	38.3
Technical or professional training	32.0
University	44.1

Size of agglomeration:

<2000	33.7
<20,000	34.5
<100,000	39.6
>100,000	39.7
Paris	41.2

Time spent reading the press was above the mean
among men
among the 50+ age group
among people living in large towns or Paris
among "management" and persons having had a university education.

iii Percentage of individuals having had at least one contact with each media yesterday

The results of this survey also made it possible to know the number of individuals having been in contact (for at least five minutes) with each media on the previous day.

Television and the press were the media with which contact was most common on a day-to-day basis (88% for television and 84% for the press).

Radio came in third place with a score of 73%.

Similar results were obtained for the various press types:

Daily Newspapers	46.7%
Magazines	69.6%
Television magazines	48.5%

The multi-media nature of the survey also enabled double and triple crossover contact between the three main media to be evaluated:

The proportion of persons having had at least one yesterday contact with both:

Radio and the press was	63%
Radio and television was	65%
The press and television was	76%

As concerns the three media together, more than half (57%) the interviewees had at least one yesterday contact with each.

iv Context of media consumption

Another aspect of this survey, and a more innovative one, was in being able to analyze the consumption of each media by placing it within the context of daily activities.

Because of the time-budget method used, it was possible to determine whether the media consumption was an "exclusive" occupation or one carried out alongside another at the same time.

(Breakdown of contacts in % according to whether exclusive or concomitant with another)

	Press	RADIO	TELEVISION
Exclusive Activity	47.6	9.8	65.6
Television or radio	19.7	-	-
Eating	10.7	19.9	19.6
Child-rearing and household tasks	-	19.4	5.0
Leisure	7.6	12.3	6.2
Working	4.0	15.8	-
Travel	2.2	13.5	-
Other activities	8.2	3.5	3.6
Total	100%	100%	100%

It is interesting that whereas contacts with the press were virtually exclusive activities, the radio remained the accompanying media *par excellence*.

As to television, one third of contacts were linked with other activities simultaneously; the main ones were eating meals, housework, looking after children and, in certain cases, reading a book.

v Breakdown of press contacts throughout the day

Analysis of interviewee time-budgets throughout the day highlighted three main period for reading the press:

Daily newspapers were mainly read in the morning (i.e. before midday);

25% of magazine readership occurred during the afternoon from 1:30 to 4:30 pm;

And television magazines were read mainly during the evening from 8:30 to 10:30 pm.

vi Place of media consumption

Home was the most common place for media consumption. Over 80% of all contact with the three main media as a whole took place at home.

This applies for the press, since 82% of the reading yesterday occurred at the interviewee's home. The proportion was even greater for television, reaching 95%.

Only radio contact occurred to a great extent away from home (37%); this was in part due to the non-negligible time spent listening to the radio while travelling (13%).

vii Mean number of titles read and picked up yesterday

Lastly, the Multi-Media Time-Budget Survey provides information on the press in terms of reading volume and press handling.

For the press as a whole (all types together), the mean number of titles read was 1.7 per individual and 2 per reader on the basis of persons having stated at least one yesterday reading.

These results may be expressed in terms of publication group:

The mean number of dailies read yesterday was 0.5 per person and 1.1 per reader

The mean number of magazines read yesterday was 1.1 per person and 1.6 per reader

Similarly, the number of press contacts for the whole day divided by the number of individuals having read at least one title yesterday enabled the rehandling rate through the day to be estimated.

This rate was: 1.3 for daily newspapers, 1.8 for magazines, and 1.2 for television weeklies.

2. CONTRIBUTIONS OF MMTB TO MEDIA ANALYSIS

2.1 UNDERSTAND: HOW MULTI MEDIA EXPOSURE WORKS

The three media have certainly equivalent audiences and penetrations.

If over and beyond audience we take into account repetition and length of contact, isn't the balance between the three media upset?

The CESP **Budget-Temps-Media** provides a simple answer to this question: just observe how the media is consumed hour after hour :

- how often each day is one in contact with each of the media?
- when do these contacts take place?
- how do the contacts cumulate over time?
- how long do they last?

The answers to these questions reveal the dynamics of daily contact with the media.

Certainly, for audiovisual media, these dynamics were known media by media but the CESP **Budget-Temps-Media** survey has the immense merit of extracting print from the ghetto into which traditional audience surveys had imprisoned it, to re-establish its rights and to throw light on a reality that had remained hidden from analysis.

- **WE ALREADY SAW THAT THE MAJORITY OF FRENCH PEOPLE ARE ON AVERAGE IN DAILY CONTACT WITH ALL THREE MEDIA**
- **PRACTICALLY NO-ONE ESCAPES THE DAILY CLUTCHES OF THE THREE MEDIA**
- **THE FRENCH ARE PRACTICALLY AS OFTEN IN CONTACT WITH PRINT AS WITH RADIO AND TELEVISION**
- **PRINT AND TELEVISION DISTRIBUTE THEIR DAILY CONTACTS FOLLOWING THE SAME RHYTHM**

Firstly, something reassuring: the distribution of contacts with the media throughout the day observed in the analysis of **Budget-Temps** reconstitutes accurately the well known audience profile of audio-visual media:

- Radio is listened to above all in the morning from 7h00 to 12h00.
- Television from midday and in the evening from 18h00 onwards.
- Print readership is spread throughout the day.

But if we don't stick to this initial analysis but rather to the way in which the contacts accumulate hour by hour, something of singular importance is revealed: radio and print deliver **their** contacts to **their** audiences quicker than TV does:

- 80% of the potential total of daily contacts on television is reached only after 20h30
- print reaches 80% of its potential daily contacts an hour earlier, from 19h30 onwards
- radio from 18h00 onwards has delivered 80% of its potential daily contacts, two and a half hours before television and an hour and a half before print
- by 13h30 television has only delivered 20% of its potential of daily contacts

- by that same time print has delivered nearly 50% and radio more than 65%!

The taking into account of the rise in impact in the course of a day of the three media as revealed by the **Budget-Temps-Media** Survey again comes as a blow to conventional wisdom:

- at all times throughout the day up until 20h00, radio is the most powerful media: it provides more contacts than any other media. Its one contact coverage, that's to say the proportion of the French population it has been able to reach at least once up until 20h00 is superior to that of each of the other two media
- at all times throughout the day up until 20h00, print is on equal terms with TV. Thereafter, it is beaten by a few points in terms of the total number of individuals reached at least once
- the cumulative audience of TV rejoins that of its two competitors only after 20h00.

- **Media Time and Advertising Media Time**

For as long as the radio that is listened to, or the television that is watched, is putting out a programme, the listener or viewer is out of reach of advertising activity, unless he or she is in contact at the same time with another media.

The same is not true for print.

For as long as a reader is looking at, or reading a double page where there's advertising present, he's exposed to the advertising.

Consequence: a new concept pointed out by Jean-Louis Laborie: **THE POTENTIALLY EFFECTIVE ADVERTISING TIME**

Not all the time spent in contact with the radio and TV can be used for advertising, only that fraction the station or channel wants (or is allowed to) provide for advertising. What is more, the potentially effective advertising time available for communicating a message to someone is not all the fraction of air time devoted to advertising, but only those moments when the advertising is both aired and exposed to the eyes of the viewer aimed at (or to the ear of the listener in the case of radio).

For print, advertising time is all the time the reader is prepared to devote to reading, looking at or flicking through the pages where there's advertising.

To compare the relative potential effectiveness of media in terms of advertising activity has not been possible until now **because this criterion has been omitted from surveys** : it relates to the **time of exposure to the advertising in each media** . Yet it's a fundamental unit of measurement and of comparison. It's in this lapse of time that the advertising can be deployed: in fact, it's the only time when the individual to be convinced and the advertising can meet up with each other. At no other time can the advertising work. **The exposure time to the advertising is the only potentially effective advertising time.**

So firstly, for how long each day on average does a French person look at the TV, listen to the radio, read or flick through a magazine whilst being exposed to its **advertising content?**

It's a legitimate question because it's in this lapse of time that the advertising message will be seen, heard or looked at, recorded, understood and memorized.

- **Potentially Effective Advertising Time on TV: 6% of Daily Viewing**

It's a monumental error to assume that contact with a media means contact with the advertising found in it.

We shouldn't be thinking about 214 minutes of TV when we buy advertising space on the TV, but about the 13 minutes the average French person is going to devote to TV advertising.

- **There is More Potentially Effective Advertising Time on Radio Than on TV¹**

For the seven networks or stations taken into account², the total duration of advertising broadcast lasts 148 minutes.

But only 17 of these minutes of advertising are listened to on an average day by the listener.

Potentially effective advertising on radio represents therefore 11.5% of broadcast advertising.

- **Print Offers, Every Day, Per Individual, Much More Potentially Effective Advertising Time Than Radio or TV:**

To be rigorously exact, to evaluate precisely the length of time each reader accepts to concentrate on advertising would require a survey of the exposure time of advertising in each publication. In the absence of such a survey, a reasonable estimate can nevertheless be established on the basis of a simple consideration: except when the reader is consulting a double page containing no advertising, he is in presence of the advertising and he has an opportunity to see this advertising.

From that, even if we admit that for half the time spent with the print media in his hand the reader consults or reads pages without any advertising, this medium offers, every day, the reader 22 minutes of exposure to the advertising per reader (slightly more than radio and much more than TV per viewer.³

- **Potentially Effective Average Daily Advertising Time Per French Person: Less Than 40 Minutes**

Every day, French people are in contact with advertising a little over 37 minutes.

It's during these 37 to 38 minutes of daily advertising time, the only time that is potentially effective, that all the advertising messages that day must be directed.

The length of this contact with the advertising on each average day and Per French person is split thus between the media:

- print: 19 minutes = 50% of all total daily potentially effective advertising time
- television: 11 minutes
- radio: 7 minutes

Does it have to be pointed out that using only one medium to carry all the advertising messages in all day is not necessarily the ideal way to get the best results from advertising activity?

It's all the truer for the fact that each individual has his own habits in terms of contact with advertising, that are specific to him alone:

- such and such an individual will only listen to the radio in the morning whilst shaving, will only look at TV in the evening after 22h00 and will only read in between time one or two titles
- another will listen to the radio above all in his car, will read a paper at the bar whilst drinking his coffee and will only watch TV on Saturday afternoons for the sport
- etc...

¹On average, per day.

²In fact, it concerns only the potentially effective advertising of the following 7 networked stations: E1/E2/NOSTALGIE/NRJ/RMC/RTL/SUD RADIO.

³The ratio has been estimated, based on foreign surveys (USA, Scandinavia) and traditional data produced using various sources on the reading universe and the number of pages read or flipped through.

- **Potentially Effective Advertising Time Varies Considerably From One Individual to Another**

Certainly, these differences do not appear among target groups defined in terms of classical socio-demographic groups:

- **potentially effective TV advertising time** for the more fervent group to the least fervent varies only from **8 to 17 minutes** (from 1 to 2 roughly),
- **for radio from 8 to 22 minutes** (1 to 5)
- **for print from 10 to 26 minutes** (1 to 2)

On the other hand, if we take the trouble to group individuals in terms of their **daily media behaviour**, the differences are considerable:

- **for print potentially effective daily advertising time** varies from **9 to 30 minutes**
- **for radio from less than 6 minutes to 70 minutes** (more than one hour 10 minutes (from 1 to 14))
- **for television from less than 6 minutes to approximately 30 minutes**, (from 1 to 5)

The gaps accentuate further if we take into account the combinations of media contact: clivages print - television, radio - print, etc... and moments when these contacts take place: morning and evening, afternoon and end of evening, etc.

2.2 ACT: MULTI-MEDIAS Tmpr STRATEGY TOOL BASED ON A TIME BUDGET TYPOLOGY

- Only an alliance of the three media can provide overall each day sufficient effective contact time with the advertising to convey with any chance of success the daily volume of advertising
- It's by using the three media simultaneously therefore and knowing how to exploit their complementarity that advertising communication can be deployed fully, be understood, heard and accepted in an optimal way
- Only a thorough typological analysis of the way in which the advertising inserted in the three different media is consumed throughout the day - an analysis which must bear at the same time on the times and lengths of time and on the sequence of this consumption, that's to say the order in which the radio, TV and print are contacted - will be able to reveal the extent of these differences
- In the absence of such a typology, many individuals spread throughout the traditional targets escape for the most part advertising contact because their behaviour in terms of advertising contact is different from the majority of the target they belong to. Only combined action across the various media will allow them to be unearthed and reached effectively where and when they are in effective contact with the advertising,

A TIME BUDGET TYPOLOGY

The problem:

As we didn't want to lose the day period information, it was not possible to aggregate:

- activities and media exposures on one side
- day periods on another side

It was necessary to describe each respondent with:

- 3 places,
- 66 activities,
- 8 TV exposures,
- 22 Radio exposures,
- 153 Print exposures.

During 288 periods of 5 minutes each.

A time budget typology realised by Joseph Lion (sociologiciens)

A Challenge

A typology taking simultaneously account of:

- activities at any moment of the day
- media exposures at the same moments
- without losing the information on the precise day period for these activities and media exposures.

A new calculation technology due to Alain Marechal

Iterative Correspondence Analysis

was used in a first step of data reduction.

First 50 factors were selected and the individual correspondent scores were introduced in a

Dynamic Groups Typology

followed with a

Hierarchical Agglomerative Typology

60 TYPES

demonstrate that time budgets are in strong relationship with socio demographics

but

within a single socio demographic group, time budgets differ in an important way

A Day-Time Structuration Method

- We calculate for each respondent an index of change in activities within each couple of 5 mn periods
- In each type (an any groups of respondents) we calculate the average index for each 5 mn periods
- The breaks showing the largest average index of change in activities are selected to split the day-time into homogeneous time periods

Observations:

Changes in activities tend to be synchronous among respondents (index ranges from 1 to 200).

Index of changes in activity split the day time in 3 periods:

- a period with strong synchronism from 9pm to 7am, including long unique activity periods (sleeping and watching TV)
- periods with different activities during a short time, changing rapidly: 11am - 12.30, 13.15 - 13.45pm, 16.15-16.45pm, 20.15 - 20.45pm
- the rest of the day with various length periods.

Type 2

Movings later and less concentrated	TV exposure heavier and longer
Care of children and household more important	Radio exposure significantly lower
Meal periods shorter	Readership of magazines stronger
Than traditional "Housewives under 50 years" socio-demo target	

Type 55

Movings more important and concentrated	TV exposure more important and more concentrated in the evening
Meals less concentrated	Radio exposure more important and concentrated in the morning
Care of children later	Magazine exposure more important all day long
All working full-time	Daily newspapers more important
Than traditional "Upper professionals" socio-demo target	

CONCLUSION:

- Only systematic research of the combinations of the most effective media, those that end up by maximising the **potentially effective advertising time** for all individuals in the target aimed at can provide a truly optimal media strategy
- This systematic research can only be conceived and practised with the aid of a specific program adapted to the processing of data from **Budget-Temps-Media**
- This program is currently being experimented on at TMRP.

This brief examination of the results of the French media Budget-Temps survey seems to suggest that **the potentially effective advertising communication universe** is very different from what we imagined. The conventional view had been the result of mono-media surveys that were doubtless of excellent quality, but which lacked an overall viewpoint and perspective.

This **potentially effective advertising communication universe** can be summed up very easily :

- every day, three equally powerful media (+/- 10% either way) in terms of potential audience, compete for the consumers' attention

- they are not exclusive media : most French people are exposed every day to each of them; zones of exclusivity are very limited in size, to the extent of being almost insignificant
- every day the radio reaches most of its audience more than two hours before print reaches its peak; television reaches its peak 2 hours later, more than 4 hours after radio.
- print is without question the leading daily advertising medium in France:
 - it is equal with its competitors in terms of the number of opportunities it generates to see the advertising
 - it dominates TV in terms of the length of time spent in contact with the advertising
 - because of the way passing the medium from one reader to the next works, it provides more than one daily contact per insertion and, over the space of a few days, even more contact with the reader
 - in addition to these assets, it has another: it is in contact with the reader when and at the pace the reader himself chooses.

Press is a powerful medium, rich in diversity, it is in contact with the reader when and at the pace the reader chooses, and has nothing to envy of its audiovisual competitors if it isn't the quality and wealth of measurements these have at their disposal to exalt their own talents.