

PROMOTING PRINT BY MEANS OF A MULTI-MEDIA SURVEY - How users like this strategic instrument and how unaided recall worked

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Abstract

The Swiss Time Budget Survey M U S T was presented 1995 in Berlin as a pilot study, featuring a direct comparison of several media, based on the rating principle (also for print) and a qualification of media contacts referring to the everyday situation of media use. Several groups of users have been working with these data to define media strategies (media-mix). The paper gives an overview over the acceptance of this new instrument for media planning on the one hand, and compares on the other hand several components for a page traffic indicator to an experimental research that was done in the NRS some years before. It then draws conclusions for modifying the M U S T pilot study to become a future industry research.

Introduction

We presented two years ago in Berlin the Swiss Time Budget Survey M U S T (Media User Study). The 1995 session paper gives a detailed view of aims and methodology. The pilot study features several innovations, the most important being a quantitative comparison of media categories and a qualification of media contacts referring to the situation of media use in everyday life. It is a complement of existing planning tools of different media which continue to be used for creating and optimizing media schedules. The main value lies in its usefulness for defining media strategies.

Several groups of users have been working with these data for the last two years, namely big advertisers, international media agencies, industry bodies (Switzerland, Germany, France), media (print and others), media research institutes, universities and the government. The process of thorough testing is still going on, but a fairly clear picture of strengths and weaknesses can already be drawn.

We put the focus on two subjects, namely the acceptance of the model of media comparison and experiences in modelling readership.

Users like it fast and easy

One aspect, which normally gets few attention from researchers, was a full success and added most to the promotion of M U S T : a graphical software that makes the manifold time budget data accessible even for non-specialists. Analyzing data "on the fly" has become fun ("What do the Swiss in bed when they are not sleeping?"). That has even evoked a critic from a "serious" media planner. One such example is given in graph 1.

Broad acceptance for the media comparison

In Berlin we presented a model with eight media groups ("mediagram" with 3 groups of radio stations, 3 for TV and 2 for print media). Media planners stress the usefulness of this gross comparison for strategic purposes on the base of a similar rating definition for several media categories. However, M U S T shows only three media and too few categories within these media. This problem could be solved in a future study, since 10 media are already present in the time budget data. Some would need complementary research analogous to the one we used for print (average page exposure) to establish comparable rating indexes. A future mediagram could look like this (graph 1); the values shown are not yet appropriately calculated.

Graph 1: Proposition for a future mediagram
(direct comparison based on global ratings)

Rating for print is average page exposure, values for "other media" are not (yet) appropriately calculated. An index over 100 means, that the target uses a media category more intensely (based on the rating model) than the universe

Universe:		French speaking Switzerland			
Target:		Joung housewives (25 to 44 years)			
Day of week:		Monday - saturday			
Rating Index for the target compared to the universe (Index = 100)					
TV	Radio	Print		other media	
87 foreign public	106 foreign stations	131 dailies	142 free sheets	122 outdoor	35 online services
84 foreign private	208 Swiss private	87 economy newsp.	101 general magaz.		
82 Swiss public	70 Swiss public	71 weeklies	135 womens magaz.	145 cinema	168 direct mail

Qualifying contacts can be useful

Contrary to the mediagram, where, for a given target group, one can immediately see which media categories rate higher than average, the qualification of contacts is more complicated. There are several perspectives to look at, e.g. the kind of activities being exercised in parallel to media use or just before or after, the function of media use (information vs. entertainment), the level of attention paid. The advantage of M U S T is, that all these data are related to a specific content of the media, since they are based on the day before the interview and on specific media that is used in a unique moment in the life of the interviewee. By that these data represent a very realistic picture. But the application takes place only on a group level and gives only general indicators, which can influence a media-mix decision, but have no relevance for a given planning schedule. This aspect is so new for the planners, that they perhaps need several years to gain control of the instrument.

All relevant parties must join

Acceptance from the power users is only a part of the solution, although an important one. Before such an operation can start, all parties including the media must join - a lengthy, tedious and sometimes cumbersome process. We are looking forward to a challenging and at the same time rewarding step, because it already has initiated debates on subjects that had been frozen before.

Unaided recall of media

Many aspects of modelling print readership are disputable. But there has been until now one powerful axiom saying, that valid readership data can only be obtained by aided recall, such as "through the book", original mastheads or at least some list of titles. In using a so-called "narrative" interview technique (we borrowed from ethnology), where the respondent recalls the day before the interview in his own words, we seemingly committed the mortal sin of media planning.

Perhaps not really, since we used some general recall technique. For any activity, the respondent remembered spontaneously, we asked: "Did you at the same time read a newspaper or magazine, listen to radio or view television?" This general reminder was systematically used for all activities including media use and proved to be "livesaving". For every act of media use, the medium was precisely identified by lists that were visible only on the screen of the interviewer. By that we did not only unveil short acts of media use (especially for print), that would otherwise have been forgotten, but synchronous media use as well. Because we did not plan to publish results on a title by title basis, we did not run any serious risk. So we looked at the results just for the sake of research experience.

We compared the results to an experimental study which was done within the National Readership Survey (WEMF 1990-91). It has the disadvantage of dating back more than four years, but the type of interview (CATI), the wording of the questions and the sampling technique were the same. We looked for 31 newspapers and 17 magazines, that had not changed very much in the meantime. Since we have no independent data to validate both studies, we do not know which is closer to reality (they might both be off). If ever this model would be used, validation should be made beforehand.

Reading yesterday

The most important comparable measure is readership per day, and the question is, whether the daily reach of a publication is at the same level of other studies or not. And if not, we should have a look at the ranking order of different titles.

The average daily reach (RY = Reading Yesterday) for dailies is in both studies on the same level, for small dailies and for larger ones as well. But the variance is very large, up to half the reach in one single case ("gossip press") and a substantial loss for a quality newspaper. The greatest difference comes with free sheets, which show in M U S T only about 40% of the RY (see table 1). All this adds up to a completely different ranking order.

Weeklies and magazines show a great loss as well, although the RY is not an appropriate measure for them because of the longer publication interval.

Table 1: Reading Yesterday (42 titles)

NRS-Experiment 1991 = INDEX 100

Print category	INDEX M U S T
9 Larger dailies (more than 40'000 copies)	100
8 Smaller dailies	98
9 Free sheets	38
5 Weekly newspapers	61
5 Weekly magazines	62
3 Monthlies	45
3 Women's magazines	74

The change in methodology from aided recall to a semi-aided "narrative" interview affected the various categories very differently, but M U S T shows with the exception of dailies in all cases substantially lower values. The question is, whether this would result in a lower rating for print publications in the mediagram or not. We shall answer this at the end of the article.

Pickups per day

The second measure is the number of pickups for a title per day. Contrary to the diverging pattern we observed for the daily readership, M U S T shows a mean number of pickups per day that is about 20% lower for all print categories (table 2). In addition to that, there is little variation within the categories. Our hypothesis is, that an unaided or semi-aided recall of the pickups of yesterday may leave some real ones undetected, resulting in a systematic underestimation. But no one can be sure that aided recall does not produce an overestimation. Still, both hypotheses do not explain the linear loss through all the categories.

Table 2: Pickups per day (42 titles)

NRS-Experiment 1991 = INDEX 100

Print category	INDEX M U S T
9 Larger dailies (more than 40'000 copies)	83
8 Smaller dailies	85
9 Free sheets	84
5 Weekly newspapers	75
5 Weekly magazines	78
3 Monthlies	79
3 Women's magazines	77

Page traffic and reading time

The volume of reading (one of several values to calculate average page exposure) was registered in both studies by prompting the amount read for each single pickup by a gross estimation ("all the pages", "practically all", "around three quarters", "around half", "around a quarter", "only a few", "practically no page at all"). The duration of a pickup instead was calculated in M U S T partly indirectly on the time budget information giving the starting time and the end of reading a specific title, partly by direct questioning of the duration. The former method produced perhaps an overestimation, because the respondents cannot always give a precise time frame for their activities.

Contrary to the number of pickups, M U S T registered much higher values for the volume of reading and the time devoted to a pickup (table 3). If we calculated the total per day by multiplying the volume by the number of pickups per day, this would still result in a gain for both measures compared to the 1991 experimental study (about 20% for the volume and about 50% for the time

spent on reading). The volume of reading was established in the same manner in both studies, whereas the duration of reading was obtained directly for a given pickup in the 1991 experiment and partly indirectly by giving the starting and the ending time of a pickup.

Table 3: Page exposure and reading time (42 titles)

NRS-Experiment 1991 = INDEX 100

Print category	INDEX M U S T	
	volume	time
9 Larger dailies (more than 40'000 copies)	149	166
8 Smaller dailies	141	166
9 Free sheets	136	151
5 Weekly newspapers	144	200
5 Weekly magazines	140	159
3 Monthlies	191	197
3 Women's magazines	145	163

Conclusions

In developing a general model for media comparison on a strategic level, we found an answer, that was accepted by media planners. They stressed however, that it should include all advertising media, not only press, radio and TV as we did in the pilot study. Technically it seems to be feasible, but the system would need to be accepted also by the media - that means that we shall have a long way to go.

By using a semi-recall technique, M U S T measures readership differently compared to an earlier experimental study with systematic recall of titles. This results in a 20% higher average page exposure per day with little variance between print categories and a 40% higher average reading time per title and per day. This effect is generally balanced out by the loss of readers per day, but in an unequal way for different categories and titles. By this, M U S T seems to give an accurate picture of general print use compared to other media but lacks some precision for the single title. So its initial aim, to be a strategic instrument for media-mix discussions, is still valuable.