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THE MULTIMEDIA SURVEY: A CHALLENGE OR JUST AN EXPERIMENT?

A multimedia survey has been lacking in Italy for a long time and, for a number of reasons, has never been conducted up to the present.

In 1984 the Armando Testa agency, building on an experience that has now become a tradition (*Survey on advertising recall for single medium*, 1983; *First survey on local TV audiences*, 1978; *Survey on the actual exposure to advertising* by RAI - the Italian Government owned Broadcasting System, 1980; *First qualitative survey on TV image*, 1981; *Coincidental survey on actual exposure to advertising* by RAI and TV networks, 1983/1984), decided to promote the first experimental survey of this kind.

It is well known that an optimal multimedia survey should, among other things, take into consideration the correlation between media and product consumption as well as the specific targets involved.

As a first step, we decided to evaluate the different available methods, their results, and their operational effectiveness, through a multimedia survey unrelated to actual consumption patterns. We then carried out, in March and April 1984, two different multimedia surveys, using different techniques of data collection as well as different methodologies.

MULTIMEDIA PANEL

The panel is widely known as the most effective technique since it allows one to investigate the behaviour of any single subject. It was assumed that in a multimedia survey the time variable was very important: eg today I may listen to the radio and watch TV, while tomorrow I may only read the newspaper. If we consider only the first day, there is an overlap between TV and radio exposure while, if we consider a two-day period, the newspaper also

overlaps, and I have been exposed to a total of three media. Hence the importance of conducting a panel evaluation.

In Italy the panel method has been limited to TV (Istel-Meter); for all other media, surveys with individual interviews related to last period exposure are normally conducted.

As a check on overlap among media over time, **Table 1** compares overlap data of an average day with those of the first week (fortnightly and monthly data are also available). Such data have never before been collected in Italy.

As you can see, for example, newspaper overlap on TV is greater on an average day than radio overlap on TV (61.1 against 45.6). The same remains true after a week. Here too, newspaper overlaps with TV more than radio. If we take the magazine category, we have greater overlap with TV than radio, during an average day (magazine 30.7; radio 45.6), but after the first week overlap with TV becomes greater than radio (magazine 77.4; 75.3).

Clearly, the magazines' average day data are influenced by their publication frequency, and we may state that the time factor is responsible for variations in our overlap data because of differences in frequency of exposure to the medium itself. But before drawing any conclusions, we should take a second look, to focus on another crucial variable: the target. The relevant data are still undergoing evaluation.

Table 1 is based on a sample of 704 704 individuals. Initially we had assembled a panel of 1,200 people for 28 days: among our objectives was to evaluate exactly how long panellists would prove willing to make entries in their diaries. The fact is that for a multimedia survey the time period involved should be quite long, since

TABLE 1
Media duplication on an average day and in the first week

	TV		R		N		M		C	
	Y	1w	Y	1w	Y	1w	Y	1w	Y	1w
TV	100	100	45.6	75.3	61.1	87.3	30.7	77.4	1.7	10.8
Radio	81.2	99.2	100	100	66.5	90.0	33.8	81.3	2.5	11.9
Newspapers	80.3	99.2	49.0	77.5	100	100	32.9	80.6	2.5	12.1
Magazines	82.9	99.4	51.4	79.3	67.7	91.3	100	100	2.5	11.6
Cinema	65.2	96.2	52.4	80.8	69.9	94.9	34.4	80.8	100	100

Y = yesterday : 1w = first week

the periodicity of each medium is different (for example a monthly publication requires a panel lasting a number of months).

In this case we registered a gradual decline of 40% in diary compilation. The reasons of this decline arose after one, two or three weeks, when panellists often declared a growing disaffection with the project.

The panel was checked every couple of days by a supervisor who inspected diary entries and measured their decline. None of the 496 dropped questionnaires was cancelled because of mistakes made by respondents; the only discriminant was the panellists' tiredness and their consequent refusal to continue.

It is also important to keep in mind that in order to attract the attention of this kind of panel - which, unlike others, requires a prolonged daily involvement - it is necessary to use incentives and rewards to stimulate respondents: in our case, rewards were constrained by the need to cut down on expenses and by the fact that the research was experimental in nature.

Table 2 shows the behaviour of panellists who filled out diaries over a four-week period.

The panel shows a drop in exposure for all media as the weeks go on. The drop is not sharp and is very likely due to

TABLE 2
Media exposure

Media coverage per single week/panel

	1st week %	2nd week %	3rd week %	4th week %
TV	98.9	98.4	98.2	97.2
Radio	75.0	71.6	71.3	67.8
Cinema	11.1	13.1	11.5	10.7
Magazines	76.8	71.2	71.0	70.2
Daily newspapers	87.1	86.9	86.6	85.9

weakened co-operation by the panellist. The drop is collective and is not medium-specific except for cinema (which in Italy has low coverage). An exceptional occurrence - going to the cinema - is readily reported by respondents in their diaries.

Since evaluation of the questionnaire itself was another essential concern of our survey, we needed to test more complex questionnaires through a series of pilot inquiries: in this way we noted that a respondent can fill out only one kind of questionnaire, the simplest.

At this point the problem was to know if analysis of this questionnaire would yield the kind of audience data usually provided by other surveys through an

accurate reconstruction of actual exposure to the different media.

This evaluation necessarily requires a large number of cases, but analysing every single questionnaire afterwards was a very long and expensive yet essential step. This kind of analysis was feasible only on an experimental basis and could not be carried out nationwide without great expenditure. This drawback is especially severe in Italy where TV and radio networks not only change name locally but also broadcast different programmes in different areas.

DAY-AFTER INTERVIEWS

We tried to reach the same multimedia objectives analysed above for the panel by using a simpler method, the 'day-after' interview.

This technique is usually applied in Italy for inquiries on a single medium. It offers a number of practical advantages:

- easy traceability of the sample and brevity of direct interaction, this being limited to the delivery of the questionnaire;
- employment of a more comprehensive questionnaire with questions codified in advance to meet data analysis requirements.

The only problem with this type of technique is broadening the survey period to cover a span of time sufficiently long to capture the full range of media exposure frequencies. In our case the two methods had to refer to the same month in order not to be influenced by other variables.

With this in mind, 672 interviews were conducted with adults (spread by sex and age) over a 28-day period. In Table 3 we compare the results obtained through the two methods.

We compare media with the same daily incidence. We note that coverage

TABLE 3
Day-before exposure to a single medium

	'Day-before' panel %	'Day-before' personal interviews %
TV	79.5	69.6
Daily newspapers	68.8	65.6
Radio	44.6	38.0

results on panel interviews are higher than the ones monitored by day-after interviews. One possible reason could be the degree of involvement of panellists, whose co-operation is not limited to making entries in the diary but often includes greater willingness to use the media. Another hypothesis is that, unlike panellists who are more motivated, interview respondents do not recall instances of minor exposure to media, such as short-time listening, etc.

We found it very reassuring that, despite the higher values of the panel, the resulting ranking of media was the same with both methods.

In the survey based on day-after interviews we included questions about exposure frequency which are usually found in media surveys carried out in Italy; we are presently analysing the data with a series of complex procedures (comparisons of communication results obtained through other available surveys, including multimedia panel surveys), in order to determine the possibility of obtaining reliable dynamic data for coverage and frequency. If so, our method would once again prove to be preferable to a panel technique which is difficult to carry out for a number of reasons inherent in the multimedia approach:

- panel duration: monthly publications require data collection for many months;

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- the selected sample depends on people's willingness to co-operate.
- the need to use a questionnaire, simple for respondents yet laborious to code afterwards;
- having to repeat the survey many times during the year in order to keep up with changes in TV programming;
- thus high costs.

None the less having at our disposal a 28-day panel for all media, independently of the multimedia analysis, we may now examine some exposure results per single medium, over a 28-day period. In the tables which follow 'outdoor' means people who had spent time outside their homes.

As can be seen from Table 4, during one month all media except cinema reach virtually the whole sample and with high frequency figures.

Table 5 shows how coverage and frequency increase for each medium by adding the second week to the first and so on up to the 28th day.

Cumulative media exposure

We can see how, by the end of the fourth week, all media except cinema attained over 80% coverage along with high frequency.

We may note, finally, that after 14

days all media reached close to maximum coverage, though further increases do occur during the last two weeks for radio, periodicals and newspapers, and of course for cinema (which displays the lowest overall frequencies).

In Table 6 we analyse consumption frequencies in greater detail.

88% of the sample is made up of heavy or very heavy TV consumers, ie viewers who watched it for 15 or more days over the 28-day period.

The most interesting aspect, however, is that radio, magazines and newspapers increase their coverage thanks to a marked presence of medium and light consumers.

From the classes of time with the highest TV audience frequencies we then took the network which displayed the highest frequencies. (Table 7)

We can see that viewer loyalty to any individual network is less than loyalty to the class of time in which the single network is included. In other words, the habit of tuning in on a specific programme or, to phrase it differently, people who watch TV at given hours often switch to other networks during the month, and this causes an increase of coverage but a drop in single programme frequency.

Such a phenomenon is typical of prime time when programmes change often, but it also occurs in hours when programmes

**TABLE 4
Media**

	<i>TV</i>	<i>Radio</i>	<i>Outdoor</i>	<i>Cinema</i>	<i>Magazines</i>	<i>Newspapers</i>
Base:	(704)	(704)	(704)	(704)	(704)	(704)
Audience	700	596	698	186	626	654
Coverage	99.4	84.6	99.1	26.4	88.9	92.9
Frequency	22.4	14.7	24.8	2.3	9.3	18.3

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TABLE 5
Exposure, coverage and frequency of media

	<i>First week</i>			<i>Second week</i>		
	<i>Exposure (values)</i>	<i>Coverage %</i>	<i>Frequency</i>	<i>Exposure (values)</i>	<i>Coverage %</i>	<i>Frequency</i>
TV	4,082	98.9	5.9	8,024	99.3	11.5
Radio	2,304	74.9	4.4	4,552	80.4	8.0
Outdoor	4,385	97.9	6.4	8,810	98.4	12.7
Cinema	97	10.8	1.3	219	18.8	1.7
Magazines	1,601	76.6	3.0	3,015	83.4	5.1
Newspapers	3,000	86.6	4.9	5,943	90.3	9.3

	<i>Third week</i>			<i>Fourth week</i>		
	<i>Exposure (values)</i>	<i>Coverage %</i>	<i>Frequency</i>	<i>Exposure (values)</i>	<i>Coverage %</i>	<i>Frequency</i>
TV	11,898	99.4	17.0	15,681	99.4	22.4
Radio	6,725	83.0	11.5	8,798	84.5	14.8
Outdoor	13,179	98.6	19.0	17,627	98.6	25.4
Cinema	315	23.0	1.9	417	26.0	2.3
Magazines	4,443	86.8	7.3	5,783	88.4	9.3
Newspapers	8,915	91.8	13.8	11,867	92.3	18.3

TABLE 6
Major media consumption frequencies

	<i>TV %</i>	<i>Radio %</i>	<i>Out- door %</i>	<i>Cinema %</i>	<i>Maga- zines %</i>	<i>News- papers %</i>
Non-consumers (never in 28 days)	0.6	15.3	0.9	73.6	11.1	7.1
Consumers (at least once in 28 days)	99.4	84.7	99.1	26.4	88.9	92.9
Light consumers (from 1 to 7 days in 28)	2.1	25.2	1.0	25.6	40.5	16.2
Medium consumers (from 8 to 14 days in 28)	9.1	15.2	1.1	0.8	31.8	15.4
Heavy consumers (from 15 to 21 days in 28)	24.1	16.5	7.9	-	12.5	18.3
Very heavy consumers (from 22 to 28 days in 28)	64.1	27.8	89.1	-	4.1	43.1

TABLE 7
Classes of time
with highest consumption frequencies
selected from two TV networks

	7.30 - 8.30 pm Network X	00.30 - 2.30 pm Network Y
Average frequency (viewing days in 28-day period)	9.3	6.9
	%	%
Light viewers (from 1-7 days in 28)	54.6	68.9
Medium viewers (from 8-14 days in 28)	19.2	10.8
Heavy viewers (from 15-21 days in 28)	12.0	12.6
Very heavy viewers (from 22-28 days in 28)	14.2	7.7

tend to remain fairly constant during the month.

We have further evidence of how individuals exist in a manifold universe of media. (Table 8)

In one day only about 40% of the sample is reached by three or more media.

TABLE 8
Analysis of major media overlap
in the various time periods

	Aver- age day %	First week %	First 2-week period %	28 days %
0 medium	4.9	-	-	-
1 medium	22.1	3.4	1.7	0.1
2 media	34.7	10.5	7.4	5.5
3 media	28.5	27.3	21.6	16.3
4 media	9.6	51.4	54.3	56.4
5 media	0.2	7.4	15.0	21.7

As time goes on the number of people exposed to more media increases, and after 28 days about 80% of the sample is reached by four or more media.

Besides the analysis which can be carried out with a panel for a single medium, day-after interview surveys provide a number of qualitative results on media exposure which are not presented here.

We may now proceed to the most important aspects of multimedia: data utilisation.

On this subject we may take by way of example the media plan for a budget amounting to 300 million Lire to be spent in a week. If we employ

TABLE 9

	GRP's	Reach	OTS		GRP's	Reach	OTS
TV	100.4	61.9	2.4	Radio	362.9	50.1	7.2
Radio	362.9	50.1	7.2	Newspapers	58.7	30.0	2.0
TV	100.4	61.9	2.4	Radio	362.9	50.1	7.2
Magazines	122.3	53.1	2.3	Magazines	122.3	53.1	2.3
TV	100.4	61.9	2.4	Magazines	122.3	53.1	2.3
Newspapers	58.7	30.0	2.0	Newspapers	58.7	30.0	2.0

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traditional media exposure surveys, such as are normally used in Italy, we obtain the following results:

By spending 300 million Lire entirely on TV we obtain 226.8 GRP's - 78.7 reach and 2.9 OTS.

By spending 150 million Lire on one medium and 150 million on another, we obtain the results shown in Table 9 for the individual categories of media.

Until now, however, we have not known which of the six different combinations is capable of reaching the highest coverage and/or the highest frequency for the target as a whole.

Using our multimedia survey on this same media plan (as adopted for the previous analysis) we obtained the results shown on Table 10.

TABLE 10

	GRP's	Reach	OTS
TV + radio	463.4	79.7	5.8
TV + magazines	222.7	81.7	2.7
TV + newspapers	159.1	73.2	2.2
Radio + magazines	485.2	73.3	6.6
Radio + newspapers	421.6	63.9	6.6
Magazines + newspapers	181.0	65.8	2.8

The combination can, of course, include more than two media, and we present this plan merely as an example.

CONCLUSIONS

A great deal of analysis is still needed before the validity of the methods employed in our two experiments can be confirmed. However, we may at least express some preliminary impressions.

Although the panel appears to be the most complete tool for collecting data on a single medium, it is not effective for multimedia surveys, because the co-operation needed to cover different times of media exposure would have to be too long, despite simplifications in the questionnaire.

As far as we can see, 'day-after' interviews do not present any great problems in terms of feasibility or of results.

Caution has to be taken, however, in carrying out the survey over a very long time period. At the same time, a large sample is necessary in order to be able to break down each broad media category into finer results (and this would involve a very high cost). So how can we operate at acceptable costs? The answer is: by supplementing traditional single medium surveys with multimedia surveys.

Traditional surveys provide us with single-medium audience, coverage and frequency data, up-to-date and based on reliable samples. Through multimedia we can assess media overlap.

Now at Armando Testa we are carrying large numbers of small multimedia surveys linked to specific targets and for products which are tested on our clients' behalf. This means that all surveys done by the 'Creativity' Research Institute, which co-operates with our agency for given products (product tests, advertising tests, etc) include questions aimed at collecting day-before media exposure by each individual. After collecting a significant number of cases, we obtain multimedia data for single products and targets.

Finally, it should be stressed that the two multimedia surveys discussed here are experimental in nature, both because they were basically conceived as feasibility studies and because they were limited to the one city of Turin.