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Single Source - no future?

Synopsis

In the seventies and early eighties a considerable number of media researchers felt, that single source systems would be the tool of the future. Single Source systems should deliver all reach and frequency data for all media, combined with data about consumer behaviour.

Whereas these systems proved to work reasonably valid for TV, experiments with print media led to rather disappointing results.

Being aware that some colleagues in the research community still hope for solutions by a technological breakthrough, the authors are representing a more skeptical point of view. They try to point out, that the very nature of print media raises some basic problems which cannot be solved within the framework of Single Source systems.

Therefore they plead for multiple source systems; i.e. one source per media category. Otherwise they fear a decline of quality standards in print media research and damage to the print media industry because of invalid and obsolete data.

What is the issue?

Not only for academic purposes - let us make very clear what we are talking about. Actually, the term 'Single Source' is used for different concepts: in the sixties and seventies we usually meant by Single Source an all media survey, covering all the data for all categories of media that could be used for media planning.

Originally, Single Source was a topic of the seventies and early eighties. The dream then was to have an all media survey **including consumer data**, to enable media planners to define their target groups not only by demographics, but also by consumer behaviour (heavy-, medium-, light-consumers, loyal buyers, brand switchers etc.).

Let's face it: a lot of us - including myself - really believed in that dream, at least, before we really got involved into experiments.

Dreams and reality

In the meantime things have changed a lot. Experiments didn't deliver the data as precise and valid as we had hoped they would. And what's more important: if you look into business papers these days and you find an announcement of a new Single Source Service you discover that Single Source now means the combination of consumer data **and TV only**.

Why Single Source?

Why did we believe that Single Source could be the future of our business?

First we believed that this approach would really meet the **needs of the media planners**. We also hoped that the data could be **more precise** especially by using more and more technical devices to measure media behaviour.

And we were as naive to believe that a Single Source concept could be more **cost effective**, that one big machinery delivering everything should be more cost effective than a couple of different mid-sized surveys and panels.

In the meantime, we do know better. At least I hope there is consensus that we do know better. Some of us, including Infrates had to learn it the hard way, i.e. we spent a lot of money and time before we discovered that this concept is - in research terms - not a feasible one.

What's wrong with Single Source?

What has been und what is wrong with the concept of Single Source? For one we misunderstood **the real needs** of media planners.

There is not really a need for all-media-planning, getting all the data for all the media through one Single Source. No media planner is doing his business that way. No media planner is really comparing TV coverage versus coverage by magazines. His brain works differently. His principal decision to run his campaign on TV or in print media is influenced by very different factors than data about coverage. It depends on the nature of the specific product, of a specific campaign and its targets, where his budget will be allocated. Only after having made the decision for TV or magazines or what ever, does he really use the media data we deliver. But then for that category (TV or magazines or newspapers or radio, etc.) only.

So in reality, there is a TV plan and a magazine plan and a newspaper plan, etc. **Media planning is done on a category level** and not within the framework of an all-media-data-base.

Measuring TV and magazines: double standards

Especially disappointing was the outcome of various experiments. Our hope for more precise and more valid data was not backed up by reality. The more data we asked for the more garbage we got. That's especially true for print media and it's the magazines that are hurt the most.

I believe there are two simple reasons which explain what's happening: Whereas TV could be measured by technical-electronical devices, we still have to **ask questions** if we go for the print media. And it doesn't make any difference if we do it by face to face interview, or if you let the respondents fill in the questionnaire by using a wand, or if you are doing it by a mail survey within a panel. Everytime you run into the same problem: the respondents have to **work much harder** to deliver the data for the print media than for electronic media. And as consumer panels are concentrating on gathering data on consumer behaviour, the panels members are not extremely motivated to spend a lot of time with this additional work-load. It's not only the problem of cooperation rates; the real problem is the quality of the data: it's near to garbage, especially the data for magazines.

Memories are not made for this

But also if you do get a good cooperation rate, if you skip the consumer data in order to concentrate on media only, there still remains a problem with print media. **You have to ask questions**, whatever technique you are using to do that. By asking these questions you are confronted with the reality that TV and radio and newspapers, too, are daily media; that electronic media are on-line media, whereas magazines are not only off-line but also not daily. So you put a lot of pressure on the human capability in memorising what had happened during the last days, weeks and months. The more questions you ask for more media, especially more magazines, the more you are demanding too much of the respondents. That's not only a problem with scanner panels. It's a basic problem. **The more magazines** we are trying to cover in our services **the lower** the average data for reader-

ships is what we are getting. The same thing happens if you ask more questions about a constant quantity of magazines. (We all know that in that case different reasons are to blame - but the damage is all the same.)

Paying more for less

And a Single Source system is not really as cost effective as we naively believed in the beginning. These big, syndicated all-media-surveys and especially the big scanner panels such as the Nielsen- and IRI-panels are extremely expensive. The more you try to get problems solved by using more hard- and software, the bigger the capital investment has to be. The bills you get might eat up all of your research budget. So forget about the nice idea of cost savings. The sad truth is you are paying more for less quality.

A nightmare

But you never know - just let's imagine that there will be a future for Single Source whatever the reasons might be. (It could be the pressure of the advertisers.) In that case it is my strong belief that such a development will do considerable damage to the print media.

Why so? Well, in these services I think that only two options are left for print media: One - which is today's reality with the scanner panels - is to leave print completely out and just concentrate on measuring consumer patterns and the usage of TV. This concept is routine in the United States and it might come to Europe in the next years.

Be aware of the fact that this might not be the worst case, at least not as long as advertisers still use print-media sources and are still including print in their planning and campaigning. They might do so, if you are prepared to deliver similar (possibly less demanding) surveys which include **print media and consumer data**.

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Second rate Membership

The second option would be to include print media in these big scanner panels. In my opinion, that would be the most dangerous option, because of the reasons I mentioned before. Print media data will be not only of a lesser quality than the TV data; the system will also deliver lower figures for readerships. In many cases you will discover that these data lack a minimum of validity. So you might have joined a club, but your member ticket is second rate.

Preserve and protect

Being a researcher, the major purpose of my business is not to protect the interests of the print media. But at least we should protect the interests of our own business.

Throughout the years, print media research has established very **high standards** in developing methods and concepts in data gathering procedures as well as in data processing. We have established a well deserved image of **credibility**.

I feel that we need to do all we can do to preserve these standards and this credibility. We cannot really afford to decline to **junk research**. Research has to be more than just delivering data.

I would admit that in the past media research has been too complex sometimes and not transparent enough to our clients and other users of our findings. That's criticism we can deal with. But going only for simplicity and not being concerned about quality anymore is obviously the wrong way to go.

Meeting the real demands

So in what direction we should move? I think we should look where the real demand is. We also have to ensure that print media's interests are not damaged by low or non-quality research methods. And as

researchers we have to look for new opportunities where we can keep **high quality** standards and where space is left for **innovation**.

And the real demand, as I tried to point out before, is to get very precise and valid data not for all media at the same time from one source only, but to get that for **each media category** from **different sources**. We have to establish user-friendly data-bases for all the different media categories. That means, too, to develop more user-friendly software.

We have to insist that there is one survey or panel per media category. And possibly we need more than one survey to cover all kinds of **magazines**.

We need a change. I doubt that what we are doing now is in the interest of the print media. Gathering coverage data for hundreds and hundreds of magazines is a hazardous approach. Why shouldn't we implement two, three or four different surveys for different types of magazines per country?

Qualitative research has to overcome lip service's functions

And it might be a good idea if media research delivers a new concept to substantiate the decisions media planners have to make. There is a need for **qualitative** all-media-research which would give some additional ideas and more accuracy to the **media category decision**. That's a very demanding task I am asking for but that's our business.

And we have to demonstrate the quality and reliability of the existing and the future of print media research, too. That's one reason why we are here. That's a basic reason why this Readership Symposium has been established.

Waiting for new technology?

We should not rely too much on the development of new technology.

As far as our business is technology-driven, new techniques have been restricted to the active or passive measurement of consumer behaviour and TV's reach and frequency.

The major instrument to measure radio coverage is still the good old paper-and-pencil-diary.

And with print media there is no stable environment, no predetermined audience, no stable time reference - print media are used at different places; size and structure of readerships varies issue per issue and it might take a long time before the last copy of a magazine's specific issue has found its last reader.

A lot of obstacles to overcome. Additionally, electronic measurement of reading has to be a passive kind of measurement. Otherwise it would not be an improvement because of the interference with 'normal' behaviour patterns and because of the overload problems.

And we **cannot afford just to sit down and wait** for a possible breakthrough.

Single Source - multiple sources

For all of these reasons we are pleading for a multiple-sources-concept in media research.

Print media should resist the temptation to enter Single Source systems. It would be a no-win game.

The choice is a simple one:

Either you will know **something about everything**, or **everything about everything**. As researchers we are obliged to know as much as possible. The print media will be well advised to share this attitude with us.