

Judy Thomas
D'Arcy Masius Benton & Bowles
London UK

INTERNATIONAL PRINT RESEARCH -
THE FAR HORIZON

SYNOPSIS

International business organisation has changed fundamentally in the 1980s. Major marketing and media decisions are now made on a multi-market basis.

At present, we usually lack the internationally consistent media research input vital to making efficient decisions in this area.

DMB&B's interim solution is the concept of the "Mythical Medium-Weight" Campaign, which has some advantages and many important drawbacks.

Only in the area of research amongst business and elite audiences is there true international research. Here there exist the tools to produce genuine balanced multi-national print schedules.

If print research is to retain its importance in the 1990s, it is imperative that broadscale survey techniques are developed across frontiers.

INTERNATIONAL PRINT RESEARCH -
THE FAR HORIZON

In the 1980s there began a fundamental change in the way many consumer goods manufacturers structure their business operations.

The old international business style was characterised by four elements:

1. Manufacturing units in each country
2. National distribution
3. Local profit centre autonomy
4. Marketing budgets for each brand set by the local profit centres.

Of course, it was accepted that in each country, media costs were a major part of any marketing budget. In many countries during the 1980s those media costs rose substantially, putting pressure on the promotion of all but the most powerful brands.

The new style of business now developing, is characterised quite differently:

1. Small number of manufacturing units
2. Sophisticated cross-border distribution
3. Regional profit centres
4. Multi-national marketing and media budget decisions.

Two months ago, we received an instruction from a client which told us to "Take out Finland". This was not approval for a nuclear bombing raid. It was the client's somewhat drastic response to the agency indicating that the client's budget as it stood only allowed a dangerously light-weight of advertising when spread in magazines across his Nordic region. Taking out Finland allowed him to boost to a reasonable weight in the remaining Nordic countries.

This is a fundamentally subversive procedure to those amongst the advertising and research community who look no further than the heaving bow of their shaky national ship. How they ask, can you possibly make such drastic decisions with any solid foundation?

It will be clear to this audience, however, that there must be at least some basis upon which such inter-market investment decisions are currently being made. And of course, this is true. Various companies and agencies will

INTERNATIONAL PRINT RESEARCH -
THE FAR HORIZON

use differing methodologies, but the basis is usually some form of comparative media cost and performance data.

In DMB&B's case we have devised the concept of the "mythical medium-weight" campaign. Here is an example of this concept:-

Medium: WOMEN'S MAGAZINES
Geography: National
Target: Housekeeping persons (define)
Size: Full page, four colour
Timing: Four weeks as average of July-December 1989
Budget: Equivalent to average spend by national brand in this media at this time.

Applying this concept to each country in Europe produces a database of which the following is an extract.

MEDIA: WOMEN'S MAGAZINES:

COUNTRY	TOTAL COST	% REACH	OTS
Austria	520,000.00	45.00	1.80
Belgium	3,768,800	52.20	3.30
Denmark	186,000.00	40.30	2.04
Finland	279,000.00	79.00	2.70
France	1,214,059	59.90	2.20
Germany	725,000.00	56.00	3.20
Greece	4,900,000	25.00	5.20
Ireland	9,300.00	36.10	1.90
Italy	370m	39.00	2.20
Netherlands	648,193.00	59.00	1.80
Norway	317,400.00	81.10	3.00
Portugal	5,640,000	40.00	4.40
Spain	5,260,000	29.00	2.00
Switzerland	134,005.00	41.00	2.20
UK	85,000.00	41.10	2.00

INTERNATIONAL PRINT RESEARCH -
THE FAR HORIZON

The advantages of this system are that it:

1. has common timing
2. is in absolute money
3. reflects share of spend reality

but there are many drawbacks of which the most important are:

1. the basic audience definitions/universes are non consistent
2. reach and frequency calculations are incompatible
3. only justifiable for use at macro level.

Of course, this simply reflects the known fact that current national readership research is designed to answer the "which print vehicle?" question first, the "which medium?" question a long way second and the "which countries' print?" question not at all.

There is one area of international strategy and planning where many of these problems have been overcome and print research forms a central focus for solutions to all three of these questions.

We already have some multi-country print surveys which do a respectable job in the business and elite print arenas; EBRs, ABRS, PES4, AP5 and most recently, the IATS surveys.

These established surveys have gone a long way towards demonstrating that:

- (a) consistent target audience definitions can be achieved
- (b) samples can be drawn to adequately represent these definitions
- (c) compatible multi-language questionnaires can be successfully administered.

Here is an example of how we use the EBRs survey to construct a balanced, international and national schedule faithfully reflecting the differing needs of the client's brand in various European countries:

INTERNATIONAL PRINT RESEARCH -
THE FAR HORIZON

Scheduled Performance

Businessmen

Resident in:	% reach	Index (all countries = 100)
France	88.4	99
Italy	86.5	97
Netherlands	93.5	105
Spain	90.0	101
Switzerland	90.5	102
Germany	93.4	105
Sweden	98.1	110
UK	93.7	105
All countries	89.0	100

We have complete access to the EBRS survey and the database is installed on a pc with Telmar software in the agency. Using the flexibility of analysis this provides, we revise the initial schedule proposals to:

- (i) alter the pan-regional/pan-language/indigenous title balance
- (ii) re-tune each "national" segment of the schedule to fit the objective of the campaign
- (iii) overall, achieve the client's impact targets nationally, regionally and in total.

The final schedule had 31 publications on it.

I believe that if we can consistently survey business people's reading habits in a multitude of languages, we should equally with careful development work, to be able to consistently capture the reading habits of housekeeping persons across political, cultural and linguistic barriers. Most housekeepers I know are smarter than most business people anyway.

By the end of this decade, I am sure that the business imperatives which drive the media research industry like any other, will provide the impetus for far-ranging and consistent print research across regions. We may have to wait a little longer for globally consistent research.

If all this makes you feel that we are in dangerous and choppy waters, just remember the old sailor's remedy for sea-sickness - fix your eyes on the far horizon and steer gently towards it.