Worldwide Readership Symposium Hongkong - February 1991

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Media Research in a Radically Changing Society

Does the population of East Germany have a different approach to the media than West German society?

Introduction

The following report takes an initial look at the media behavior of the East German population*) following the end of Communist rule and the introduction of the western deutschmark. It draws upon two studies conducted in 1990 in accordance with the leading western standards of media research; both of these studies used a respondent-friendly method of determining media consumption and, at the same time, ascertained consumption and psychographic target groups in detail. Specifically, it refers to single-source studies made by the Allensbach Institute and patterned after the Allensbach Media Market Analysis, which has been conducted annually since 1959 and which has been constantly refined based on experimental research.

Before presenting our current findings, we should first briefly outline the role of advertising and media in the former GDR.

*) Our data refer to 13.4 million people 14 years and over, which is about one-fifth of the German population reunited in 1990 (West Germany 49.8 million).

The Role of Advertising in the GDR

For more than four decades, there were no free, privately run media in the GDR: advertising was controlled to varying degrees by the government party, the SED, and was used to "exert carefully aimed influence in line with the ideological principles of the party." The <u>DDR-Handbuch</u>, a standard West German work on the GDR, described the role of advertising in the GDR as follows: 2

As a tool of the state party and the party-controlled bodies of government, the purpose of advertising was to permeate the social, political, cultural and economic life of the entire country; it was viewed as an integral methodological element of Communist agitation and propaganda. In keeping with the SED's dominant role in the creation of advertising, no advertisements for ideas and goals which did not conform to those of the party were permitted.

Commercial advertising was a severely neglected economic factor in the GDR after World War II. On the one hand, commercial advertising was viewed as a remnant of the capitalist system which was to be tolerated but not supported. Advertising was equated with squandering national assets. On the other hand, the economic situation was characterized by a high level of unsatisfied demand, meaning that the government administration was able to distribute products with practically no advertising.

Until the early sixties, domestic advertising in the GDR was aimed primarily at facilitating and expediting the sale of hard-to-sell and often inferior goods.

A wider range of goods led to increased advertising efforts from 1963 onwards and, to a limited extent, television commercials were even broadcast in the sixties and seventies, a practice which was, however, discontinued again in the mid-seventies. By the eighties, the legitimacy of advertising was no longer questioned in principle, although the expenditures for this purpose were still considered

unproductive in line with the Marxist model. Expenditures for both export and domestic advertising thus lagged far behind the expenditures in western countries.

Media in the GDR

In 1989, the development of the media in the GDR was described extensively by Jürgen Wilke in the West German Fischer Lexikon Publizistik - Massenkommunikation. The following refers to this overview.

TV and Radio

While only 600 persons owned a television set in the GDR in 1953, 13,600 viewing permits had been issued by 1955. In 1960, there were already more than a million registered television owners. The number of viewing permits was listed at 6,138,900 in 1986, i.e. 94 percent of all East German households were equipped with television (practically the same coverage as in West Germany).

This meant that television had also reached the saturation point, as radio had done some time before. By 1986, 6,690,700 radio listening permits had been issued (=99 percent of all households--the same as in West Germany).

From the very beginning, one special problem for the GDR was the fact that radio and television programs from the Federal Republic could be picked up in many parts of East Germany. Initially, a battle was waged against listening or viewing western programs. In part, antennas directed westwards were dismantled by members of the state youth organization, FDJ (Free German Youth). Additionally, jamming stations were put into operation. Yet the attempts to prevent citizens from tuning in to western broadcasts, which could potentially have a destabilizing effect on the country's domestic politics, repeatedly caused unrest in the East German population. The turning point in this respect came in the early seventies and

it was estimated that about 80 percent of the population had access to the West German ARD and ZDF television stations by the eighties.

Newspapers and Magazines

According to official statistics, which were only occasionally released to the public, the 39 daily newspapers had a total circulation of 9.4 million copies in 1987 (1965: 6.5 million). The SED newspapers, which had a circulation of more than 6 million--including Neues Deutschland, the SED's official party organ with a circulation of 1.1 million--accounted for the major part of overall circulation figures.

The most important of the 541 magazines in the GDR, which had a total circulation of 21.4 million issues, were those dealing with technology and science, as well as with politics, society, government, law, economics and medicine. At the same time, 30 weeklies and illustrated newsmagazines had a total circulation of over 9 million copies. In 1987 the most popular weeklies included:

- FF-dabei, the radio and tv magazine
- the family magazine Wochenpost
- the women's magazine Für Dich
- the fashion magazine Pramo
- the Neue Berliner Illustrierte
- as well as the Magazin, which is published monthly and
- the satirical magazine <u>Eulenspiegel</u>.

Because paper for printing was subject to government rationing, however, the demand for these titles frequently could not be met.

Media Research After Monetary and Economic Union

So much for the initial situation in the GDR, before the Berlin Wall was breached and the GDR borders were opened on November 9, 1989. From then on, the West German media and products were available to citizens of the GDR for the first time; beginning in July 1990, the economic and financial union was in effect, which meant that the western deutschmark was available to East Germans.

How did the East German population react to the western media after the introduction of monetary and economic union? To clarify this, the Allensbach Institute was commissioned by the Gruner + Jahr publishing company in Hamburg to conduct a representative survey immediately after the introduction of the deutschmark in the GDR; the survey took place in July and August 1990.

In spring 1990, after the Allensbach Institute had managed to the pronounced reorientation of preferences with the tools of election research used in the West⁴, the next step was to determine whether western standards can be employed to ascertain media use in East Germany. This initial study was essentially identical with the field of investigation of the 1990 Allensbach Media Market Analysis (AWA), the media market study conducted annually in West Germany by the Allensbach Institute since The first Allensbach media study in East Germany (sample 1,505 respondents and over) 14 provided indications that western methods of ascertaining readership, listener and viewer groups in East Germany resulted in less valid findings than in the West. Subsequently, the first of wave the AWA conducted in East Germany was November/December 1990 (Sample 2,014 respondents The initial findings from both studies are reported on in the following.

Key Findings on Magazines

Two magazines were specifically developed for the GDR by the western publishing companies Burda and Gong:

- <u>Super Illu</u>, an illustrated newsmagazine at a more reasonable price (DM 1.--) than competing illustrated newsmagazines; by the end of 1990, coverage was one out of four East Germans (readers per issue 24.5 percent)
- <u>Super TV</u>, again available at a relatively reasonable price (DM 1.40); coverage was slightly more than one-fifth of East Germans (21.7 percent) by the end of 1990.

The program supplements to the daily newspapers initiated by western publishing companies (free of cost) also reached relatively many East Germans:

- Tele Prisma 17.3 percent
- Telestar 14.9 percent.
- The supplement <u>BWZ</u> introduced in the state of Thüringen attained more than 50 percent coverage in the region.

Most of the leading West German radio and television magazines reached a lower percentage of readers in East Germany than in the West. One important reason for this is that the television magazine FF-dabei, which used to lead in this category in the GDR, was able to maintain a relatively stable position: In July/August it reached 22.9 percent of the population, in November/December 19.2 percent.*) In addition, relatively low priced TV guides originating in the West were very successful in the East.

*) See Table 10

Table 1

<u>Coverage Figures for West German TV/Radio Magazines in East and West Germany</u>

	West Germans AWA-West 1990	East_Germans July/Aug. Nov./Dec. 1990 1990
<u>TV/Radio magazines</u> readers per issue (West):	x	(AWA-East)
Bild + Funk Fernsehwoche Funk Uhr Gong Hörzu TV Hören und Sehen	7,1 68.3 22.1	3.6 4.3 9.2 10.4 5.7 7.4 1.4 1.0 9.8 9.9 10.6 9.8
TV/guides (cheaper than TV/radio magazines)	:	•
Auf einen Blick Bildwoche Die Zwei	7.4 2.9 3.7	6.8 12.2 4.7 4.5 3.4 3.2

The illustrated newsmagazines from West Germany were not able to attain the kind of readership percentages they have in the west. Bild am Sonntag, however, attained a higher percentage of the readership in East Germany than in West Germany.

Table 2

Coverage Figures for West German Illustrated Newsmagazines in East and West Germany

West G A WA- 19	West	July/Aug. 1990	ermads Nov./Dec. 1990 (AWA-East)	
;	4	X	x	
Readers per issue of lliustrated Newsmagazines:				
Bunte	9.0 7.6 44.6 7.9	4.7 3.2 5.5	5.7 6.3 2.8 5.7 23.2	

The West German weekly women's magazines in part attained higher readership percentages than in West Germany, while biweeklies reached fewer readers. However, monthly women's magazines, which are essentially geared to fashion, are more in demand in East Germany than in West Germany—and the same applies to crossword puzzle magazines.

Table 3

<u>Coverage Figures for West German Nomen's Magazines in East and West Germany</u>

ĀÑ	Germans A-West 1990	East_G July/Aug. 1990	Germans Nov./Dec. 1990 (AWA-East)
	*	X	x
Weekly women's magazines			
Die Aktueile Bella Bild der Frau Frau im Spiegel Freizelt Revue Das Goldene Blatt Mini Das Neue Blatt Neue Post Praline Tina Wochenend Glücks Revue	4.3 3.5 8.2 5.2 5.3 4.1 0.8 3.6 5.3 4.3 7.2 3.6	1.5 3.1 12.0 5.2	2.6 11.7 4.2 5.6 4.1 4.3 4.3 1 1.8 3.2
Extra Rätsel	1.4 4.7		4.6 12.5
Biweekly women's magazines Brigitte	10.1 7.5 7.4 4.2	6.3 2.0 6.4 3.9	1.8 (_{17.7} 6.0
Monthly women's magazines Burda Moden	5.9 3.4 2.6 3.3 4.1 2.5 2.8 2.1 5.3	12.0 1.8 1.9 4.1 1.9 1.7 5.6 1.7	2.6 2.8 3.8 2.0 1.7 6.7 2.4
Eltern Essen & Trinken Kochen & Genteßen Schöner Essen	4.1 1.0 } 6.9	1.5 1.4 2.7	1.8 2.0 { 5.8

West German magazines for young people are very much in demand, as are titles about automobiles and motorcycles.

Coverage Figures for West German Magazines for Young People in East and West Germany

· Table 4

ÄN	Germa A-West 1990	ns	East_G July/Aug. 1990	ermans Nov./Dec. 1990 (AWA-East)
	x		x	x	
Magazines for young people	,			١	
Bravo	3.9		15.0	16.5	
Bravo Girl	2.4		6.5	7.4	
Mädchen	2.0 (2.6	2.7	
Pop Rocky	1,4	13.2	2.7	3.0	35.0
Musik Express/Sounds	1.7			1.1	
Popcorn	1.8)		4.3	

Table 5

Coverage Figures for West German Automotive Magazines in East and West Germany

ÄÄ	Germans A-Nest 1990	East_0 July/Aug. 1990	ermaos Nov./Dec. 1990 (AMA-East)
	X	x	x
Automotive magazines			,
Auto Bild	5.0	12.0	9.7
Motorsport aktuell	1.3		2.4
Auto Motor und Sport	5.4 (16.5	6.9	3.9
Auto Zeitung	1.4	4.7	3.3 (24.1
Sport Auto	1.8	6.4	3.0 \
Motorrad	1.6	2.7	1.8
Sum of comparable titles	15.2	32.7	21.7

As to the trend for different magazine categories, however, there were relatively great reductions in coverage for automobile and motorcycle magazines between July/August and November/December 1990, with their coverage decreasing by approximately one-third (Table 5).

This is explained as follows:

Many East Germans were about to buy a car in the summer, as the figures for November/December show: 34 percent of the car drivers in East Germany reported that their car had been bought within the last 6 months (in the summer this rate was only 19 percent).

This is also evident from consumer purchasing plans: In the summer of 1990, 37 percent were planning to buy a car in the next 1 to 2 years, as compared to 30 percent in November/December.

The connection between interest in buying a car and use of special interest titles in the automotive field is thus clearly proven.

There is relatively strong interest in West German home and garden magazines, as well as in West German do-it-yourself titles in East Germany.

Table 6

<u>Coverage Figures for West German Home, Garden and Do-It-Yourself</u>

<u>Magazines in East and West Germany</u>

ÄWA	Germans - West 990	East_0 July/Aug. 1990	ermans Nov./Dec. 1990 (AWA-East)
	x	x	x
Home and garden magazines			
Flora	1.5 6.5 5.2 1.6 2.4 8.4 1.3 1.0	5.4 5.4 3.2 1.6 1.4	2.6 9.7 7.3 3.0 1.5 1.4 1.5
Do-it-yourself magazines Selbermachen	3.1 3.0 } 6.1	5.4 3.3	5.3 } 8.7

Western titles with a focus on sex have above average coverage in East Germany.

Table 7

Coverage Figures for Western Magazines with a Focus on Sex In

East and West Germany

Wes A	t Germans MA-West 1990		ermans Nov./Dec. 1990 (AWA-East)
	x	x	x
Playboy	4.4	9.5	9.7
Penthouse	2.1	3.2	
Praline	4.3	12.0	12.8

At the same time, it can be assumed that the readership profiles of western titles are not (yet) as sharply defined in East Germany as in West Germany: In East Germany the proportion of male readers to female readers of <u>Playboy</u> or <u>Penthouse</u> is three (19.9 percent) to one (6.6 percent); in West Germany the ratio is seven to one (11.8 percent to 1.8 percent).

Much the same thing applies to western fashion and women's titles: In East Germany the ratio of female readers to male readers of <u>Burda Moden</u> or <u>Brigitte</u> is 100 to 19 (26.5 percent to 5.0 percent), while in West Germany the proportion is 100 female readers to 10 male readers of the same titles (27.8 to 2.7 percent).

Is this just based on short-term interest in new and unfamiliar things? Rather than decreasing between summer and the end of 1990, the interest taken by women in men's magazines stabilized, as did the interest taken by men in women's magazines.

Table 8

East German Readers of Western Magazines on Special Topics are (not) yet Categorized so Strictly by Gender

		West Germans AWA West	East Ge	rmans
		1990	July/Aug. 1990 %	Nov./Dec. 1990
Readers p	per issue of -	x	X	1330
A) Playt	Noy Men	7.9 1.3	14.2 5.5	13.9 6.0
Penth	nouse			
	Men	3.9 0.5	5.7 1.1 ::	∷: ₹}
Total	l of both titles			
	Men Nomen		19.8 6.6	::: =
B) Burda	a Mogen			
	Men	10.7	19.8	2.7 18.0
Brigi		0.7	2.1	0.7
	Men	:::::: <u>15:1</u>	$\frac{2.1}{9.7}$::	<u>8.5</u>
Total	l of both titles			
	Men	2 ² .7 27.8	4.6 29.5 ::	5.0 26.5

^{*)} not ascertained

The influential weeklies are also used considerably less in the East than the West, although coverage increased for most of them between summer and the end of 1990.

Video magazines are expected to meet with more and more interest, but this does not apply to movie magazines.

Table 9

<u>Coverage Figures for Influential Western Magazines and Magazines on Special Topics in East and West Germany</u>

AW	Germans A-West 1990	East_Gern July/Aug. No 1990	ov./Dec.
	x	X .	*
Der Spiegel	1.5	6.8 0.9 2.3	
DM	36.5 2.1 3.4	1.8	2.3
Die Zeit	5.4)	0.9	
Geo	9.4	1.0	1.8
Sports magazines Sport Bild	4.5	8.3	5.0
Movie/video magazines Cinema	3.8 7.3 3.7	2.9 1.6 0.9	
Computer magazines Chip C't Magazin für Computer-Technik	1.8 0.6 } 2.4	2.0	1.6

In addition to plans to purchase cars, relatively many East Germans were planning to purchase a video recorder during the second half of 1990:

- In July/August 11 percent of the East German population owned a video recorder; in November/December this number had almost doubled (19 percent).
- Correspondingly, plans to purchase video recorders dropped from 31 to 24 percent during this period.

Thus, the market for video recorders is one of the markets with the greatest buying potential; along with cars and video recorders, the East Germans are most prone to want to buy microwave ovens (24 percent) in the next few years.

In general, it can be said that certainly not all West German titles have increased their coverage in the area of the former GDR since summer 1990, although many were able to stabilize their position by November/December 1990. This does not mean that GDR titles which were formerly popular became meaningless, although they displayed a greater tendency to lose coverage than West German titles.

Table 10

Coverage Losses for East German Titles Do Not Automatically Mean Coverage Gains for West German Titles

	East_German	/ember/December
Readers per issue of -	X	*
A) Magazines - "titles formerly popular in Neue Berliner Illustrierte . FF Dabei	10.2 22.9 9.3 11.9	19.2 6.7 8.4 <u>11.3</u>
- "titles of West German magaz Neue Revue Stern Bunte Bild am Sonntag Hörzu Brigitte Burda Moden Der Spiegel	4.7 5.5 4.8 22.4 9.8 6.3 12.0	5.7 5.7 23.2 9.9 5.6 10.8
B) National daily newspapers - "titles formerly popular in Berliner Zeitung Berliner Zeitung am Abend	6.9	
- "West German titles" Bild B. Z Handelsblatt	3.1	2.4

Key Findings for Daily Newspapers

- As shown in Table 10, East German titles in the daily newspaper category continued to be read frequently even after the deutschmark was introduced in the GDR.
- The "formerly popular East German titles" lost readers between summer and winter 1990, but the national daily newspapers originating in West Germany did too.
- Loyalty to regional daily newspapers, however, remained constant (78 percent of readers per issue in the summer of 1990 and 79 percent in the winter).

media expert Walter J. Schütz found "that In October 1990, the demise of East German newspapers, which had been feared after the breach of the Wall and the introduction of monetary and economic union, had not occurred. Thirty-four of the 39 newspapers which had existed in the GDR prior to the opening were still being published. Although total circulation had decreased by about 30 percent, from 9.4 million issues to about 7 million issues, an analysis by titles showed that regional and local newspapers had remained amazingly stable. It was mainly the national newspapers, particularly Das Neue Deutschland which had had to deal with considerably reduced Former local party newspapers were able to remain stable as almost all of them had succeeded with West German publishing connections establishing companies. This ranged from loose cooperation with the transfer of know-how, to guaranteeing the availability of printing, handling the printing of advertisements in the Federal Republic of Germany and even including financial stability of participation or takeovers. The publishing companies is even more remarkable in view of the fact that 78 new newspaper titles are now published in the former GDR by 44 West German publishing companies which are New eastern-based newspapers, small. generally rather essentially created as a forum for new political groupings, have not come into being."5

Print Media and Television

- In conclusion, it can be said the East German population continued to use a remarkable number of its former titles despite the considerably broader spectrum of media products available. Questions as to the part played by subscriptions, face-lifting or a basic reorientation of the titles and as to whether the latter would have been able to survive without the support of western publishing companies cannot be addressed within the framework of this study.
- Some West German titles were soon able to attain the same percentage of readers in the GDR as in West Germany or an even higher percentage, while other titles made headway very slowly or not at all. We are not in a position to determine the extent to which the price of the titles, the distribution and delivery terms or quite simply the focus in view of a population with a stronger rural orientation are responsible for this (in East Germany, approximately one-third of the population lives in towns with less than 5,000 inhabitants, compared with in West Germany). Ιt is significant, one-seventh however, that a number of West German titles meet with much the same readership conditions in East as in West so that there is not much to speak for a Germany, basically different use of the print media in East and West Germany.
- + Up to the present there has been a considerable difference, however, in the use made of television in East and West Germany: While more than half of the East Germans watch television at least three hours daily, this only applies to one-third of the West Germans.

Table 11

East Germans Watch More Television

Question: "Could you estimate how many hours of television you watch on a normal working day--Monday through Friday--how many hours per day on the average? Would you say ..."

	West Germans	East_Ge	rmans
	AWA-West 1990	July/August 1990	November/December 1990 (AWA-East)
	x	X	X X
More than 4 hours About 4 hours	4.9)	8.4	9.9 13.2 53.2
About 4 hours	6.9} 33.9	11.8	13.2 53.2
About 3 hours	22.1	28.6	30.1
About 2 hours	35.2	35.2	31.5
About 1 hour	16.7	8.3	8.7
Less than one hour	12.3	4.4	5.2
Never watch television on response		<u>3.3</u>	2.4 100.0
		. 55, 6	10010

At the same time, we may posit the same amount of viewers for commercial television channels in East and West Germany in 1990; in both cases, 55 percent are in a position to pick up these channels.

A Strong Interest in Information and a Relatively Positive Attitude toward Advertising

We have described the dynamics of the automobile and video market in East Germany; it should be pointed out that there is also a strong market potential in East Germany in sectors such as

- cosmetics
- fashion, specifically the market for jeans
- renovation of apartments
- do-it-yourself
- insurance and banking services.

The East Germans basically express more interest in information than the West Germans in most consumer areas. They are very interested in technical innovations and high-quality articles; it is only where exclusive products and activities are concerned that they are more cautious than the West Germans.

Table 12

East Germans are More Interested

Quasi scale consisting of 44 or 47 areas of interest

	Especially interested in:	West Germans A WA West 1990 %	East Germans AWA East 1990 %
Step 1 - Broad spectrum of Interest	18 or more areas of interes		
Step 2	14 to 17 areas of Interest	11.2{32.6	5 17.9{ ⁵ !
Step 3	11 to 13 areas of interest	13.2)	16.8
Step 4	6 to 10 areas of interest	32.7	30.9 —
Step 5	4 or 5 areas of interest	13.8	10.3
Step 6	2 or 3 areas of interest	12.4	6.1
Step 7 - Limited spectrum of Interes	t No area of interest or only	y one	
	area of Interest (Including response)	y NO	<u>2.2</u>
		100.0	100,0

East Germans express less reservations about advertising for consumer goods than West Germans: In East Germany, 57 percent agree completely or essentially that advertising is "quite helpful to the consumer," as compared with 45 percent in West Germany.

A More Positive Attitude Toward Advertising

Table 13

Question: "If someone says advertising is really quite helpful to the consumer, would you agree with this completely, essentially, not really or not at all?"

	West Germans AWA West 1990	1990
	x	** X
Agree completely	7.0	11.0
Agree essentially	38.3	46.2
Don't really agree	35.8	28.3
Don't agree at all	13,5	11.1
No (real) response	<u>5.4</u>	<u>3.4</u>
	100.0	100.0

Although many East Germans will have considerably less buying power than the West Germans in the foreseeable future, these initial studies show that preconditions are certainly quite favorable for effective advertising by the media in East Germany.

FOOTNOTES

- Christina Holz, "Werbung," in Wolfgang R. Langenbacher, Ralf Rytlewski and Bernd Weyergraf (Eds.), Handbuch zur deutsch-deutschen Wirklichkeit: Bundesrepublik Deutschland / Deutsche Demokratische Republik im Kulturvergleich, Stuttgart: 1983/1988, p. 740.
- 2DDR-Handbuch, Bundesministerium für innerdeutsche Beziehungen (Ed.), 3rd ed., vol. 2, Cologne: 1985, p. 1475 ff.
- ³Jürgen Wilke, "Medien DDR," in Elisabeth Noelle-Neumann, Winfried Schulz, Jürgen Wilke (Eds.), <u>Das Fischer Lexikon Publizistik Massenkommunikation</u>, Frankfurt am Main: Fischer Verlag, 1989, pp. 156-168.
- Our election forecast for the first free general election in East Germany was published in <u>Welt am Sonntag</u>, No. 11, March 18, 1990 under the headline: "Allensbach: Allianz für Deutschland vor der SPD" (Allensbach was the only institute which predicted a conservative majority in East Germany). For further details see:
- Elisabeth Noelle-Neumann, "Ein demokratischer Wahlkampf gab den Ausschlag," Dokumentation eines Beitrags in der Frankfurter Allgemeinen Zeitung, No. 70, March 23, 1990, and
- Allensbach Press Release: "The First Free Elections in the German Democratic Republic," March 1990.
- ⁵BDZV intern, 34/90, Dec. 4, 1990.