

## BACK TO BASICS - READING IS STILL A MAJOR MEDIA ACTIVITY

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Subtitle:

The Strength of Print Media Revealed by a Telephone Time Budget Survey

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### Abstract

Print media in Switzerland developed an intermedia research model based on the French Time Budget Survey. It contains information about print media, radio, television, cinema, teletext, videotex/minitel, audiotex, billboards, direct mail and online services. Radio, television and print media can be compared directly for advertising purposes.

The innovation of the Swiss model lies in five areas: 1) improving interview technique by using for the first time a CATI telephone system (which cuts down interview time by 25%); 2) recording the time information as precisely to the minute as the respondent can provide it, which results in no distortion of primary information; 3) the introduction of new media, such as audiotex and online services; 4) in introducing qualification of an activity, which can indicate if a specific medium was used at a specific moment for information purposes or entertainment or both; and 5) in developing powerful software for interactive use, making the mass of information accessible under different viewing angles.

To promote the print media, the survey unveils several aspects not covered by syndicated media research - for example the fact, that dailies and radio are "contacted" early in the morning, long before TV; that print media build up their audience during the whole day; that there is an important period of reading after 21.00 hrs.; and that parallel occupations have more impact on the use of electronic media than on print.

If ever this survey is - as we hope - repeated, it will answer further important questions - such as , does the computer eat up reading time or will it distract from use of radio or TV? I believe that reading will remain a major media activity - even on screen!

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### Introduction

Two years ago in San Francisco, my French colleagues presented their unique Time Budget Survey. They explained in detail their methods and many results, as well as some ideas about how to use these data to promote the print media.

The print media in Switzerland has since established a pilot study which is based on the French model. This was possible only through a close collaboration with our friends from C.E.S.P. in Paris, who provided us with all the information we needed. Many thanks to Corinne, Hugues and their team.

We developed the model further, mainly in two directions. On the one hand we introduced direct qualifications of activities (for example each session with a specific media was qualified by its function or purpose: if it was used mainly for information or entertainment or both). On the other hand we developed an interviewing technique by telephone using an existing CATI system (Computer Aided Telephone Interview). I shall refer to this later on.

The main results concerning print and electronic media were more or less the same in Switzerland. So I shall quote only few specific results for demonstration purposes, by concentrating on the following three aspects:

- What arguments does it provide for promoting print?
- Why does the telephone method work?
- Why is it a fair comparison between basically different media?

## 1. Concepts Of Intermedia Research

### 1.1 How can research improve intermedia planning?

Media research data can be of use in three stages of the planning process:

- 1) Defining the mediamix
- 2) Fine tuning/optimizing media plans
- 3) Control of campaign impact

Stage three is of restricted relevance because the pilot study was only running for two months (although it ran at full throttle).

The primary aim was to provide tangible data for advertisers, and compare groups of media on an acceptable basis, that is to say acceptable to the advertising industry. This involved both quantitative and qualitative data.

### 1.2 Models of Intermedia Research

Roughly speaking there are three models:

- 1) The most frequently used model works with personality characteristics reflecting general media use habits. How often one uses a certain media classifies a person in the same manner as his or her habits of consumption. The drawback is, that this model cannot predict what will happen on an specific day or in a specific time period.
- 2) An integrated planning data base (as used in Germany for a couple of years) is based on an industry convention concerning the rating of readers, listeners or viewers. Its main advantage lies in the fact, that a media plan, which contains several groups of media, can be optimized as a whole and a GRP (Gross Rating Point) or CPT (Cost Per Thousand) rate can be calculated for the whole plan as well as the contribution of each media group. Is is a purely quantitative approach.
- 3) The time budget model provides qualitative indicators as well, because it describes the contact with media in its natural environment, (in the course of a day). In most cases it is based on a schedule of quarters of an hour and reflects a dozen or so activities besides media use. Is is often used for radio research. C.E.S.P in France developed a far more differentiated model containing more than 60 activities projected at intervals of five minutes.

### 1.3 The Swiss Model

We decided to adopt this model for two reasons, a political one and a scientific or practical one. Firstly, the French model was restricted to strategic use (all the existing planning systems retained their role). Secondly it appeared to be the most neutral, i.e. the fairest system. The stimulus is the same for all categories of media, and the single medium is not prompted by its name, but identified only by means of a list (available online on the CATI system, but not visible for the respondent) after the person has given his or her own description.

The concept of the French model as we see it, is based on the following components:

- The survey reflects the perspective of the user and not that of the medium as in traditional single media research. On the one hand, using media is one of several activities and in many cases not the most important one. On the other hand, most people use several media on the same day, a fact that is rarely reflected in traditional planning data.
- -The survey is comprehensive in giving a detailed picture of the respondents day. It covers 24 hours and some 60 activities. Paradoxically, we discovered that if the number of activities increases, the questioning becomes simpler - by the mere fact that the interviewer does not have to answer several further questions to determine the category to which he/she should assign the answer. In parallel, its validity increases because there is less uncertainty both in the questioning and at the stage of interpretation. The more details there are, the more accurately an activity can be allocated to a precise time frame.
- The survey of media activities becomes more precise as well.

The Swiss model contains information on the following media:

- print media
- radio
- television
- cinema
- teletext
- videotex/minitel
- audiotex
- billboards
- direct mail
- online services

and books, which are not (yet) an advertising medium. All the media information is on a time basis and therefore not always directly comparable for advertising purposes. This is notably the case for print media, where the rating (measuring the use within a copy) must be based on the volume read and not on the time spent reading. It refers also to the billboard medium and others as well.

The innovative aspect of the Swiss model appears in four areas:

- 1) What we call the qualification of an activity, for example if a medium is used (in a specific moment) for information purposes or for entertainment or for both.
- 2) No time frame is given to record the moment of an activity. The information is stored as precise as it is actually given (entering the clock time in minutes and hours of the beginning and the duration or the end time). At any moment of the interview, the person can propose a modification of this information by allocating other activities in parallel or in chronological order. This is a clear advantage of the CATI over the pen-and-paper method.
- 3) The adaptation of a complicated personal interview to the telephone method proved to be anything but simple. But it increases the validity of a time budget survey in several aspects.
- 4) The development of a powerful interactive software that can handle these manifold data rapidly and easily by means of an intuitive user interface.

## 2. Validity of the Telephone Survey

### 2.1 A Long Way in a Very Short Time

The adaptation of the French model to Swiss peculiarities through pre-tests consisted of four stages and related to two dimensions: choosing or modifying and defining activities on the one hand, and converting a complicated personal interview to the telephone technique (CATI) on the other.

**Stage 1:** taking the practically unmodified French time budget questionnaire and using it on the phone instead of face to face. There was a sample split, where half of the respondents received the list of activities in advance (the other had no visible information at hand). Results: A) the interview proved not only to be manageable but in many cases aroused enthusiasm, because people faced an unknown experience in recalling all their activities of the previous day. Some even drifted into philosophical reflections and had to be brought back to reality. B) In most cases, respondents with or without the list of activities told us that establishing the previous day's structure was perfectly possible without the printed reference. And there is less tendency to recall activities that didn't take place, if the person gives a description of the activity in her own words.

**Stage 2:** Development of a rough model of the interview by using CATI, testing and modifying it. The CATI programming system has the advantages of being very simple and thus easy to learn. But it proved to be a real challenge for the programmer for a simple reason: CATI systems are at their best as long as there is a logical flow of inter-related questions and thus providing good conditions for filtering. But our time budget interview is completely different. Not only does it contain very few occasions, where a filter question can be used to omit controversial information. But the interviewer must be free to move forward and backward on the time axis and correct existing listings to establish the course of the day as accurately as possible.

Let's take an example. You have a cat, and at the end of the recording you realize you have forgotten to feed your pet (more precisely, you have forgotten to mention this fact). So this brings minor upheaval to a quiet morning and forces the interviewer to modify the time schedule of several activities. But this is not the end, since your cat tends to get hungry twice or even three times a day with subsequent keyboard acrobatics. And how about the time you spent with your cat while the TV set was on? No problem - we provide the possibility to do several things at the same time. So you can go on stroking your pet without having to stop watching your favorite soap opera (we would even admit, that this doesn't disturb your attention for petfood advertisements).

This stage resulted in some improvements of the CATI programming (including a rough sketch of a specific part of the day on screen for better orientation). It demonstrated feasibility for the time budget part. So far so good.

**Stage 3:** We added all the other questions by conventional CATI programming and tested the whole interview in real scale. We found that the time elapsed was about an hour per interview, and that a relatively important part of this time was identifiable on tape recordings as relatively silent passages with the noise of hectic keyboard clapping in the background. Intensive training of the interviewers resulted in a considerable reduction of those "mute" moments, which tended to dampen the enthusiasm of both partners. 45 minutes was the average length at the end, with subsequent consequences on the price per interview (we had estimated its length at about half an hour before starting).

**Stage 4:** Switzerland is a multilingual country. So we did a second full scale test in the French-speaking part of our country, to ensure that the same questions and prompts resulted in the same reactions there.

It took us only three months to go through these four stages and another two weeks to get the whole operation moving. We faced 5'000 interviews in only two months - a density never matched in Switzerland before. We had reduced the geographical dimension to the big cities (about half of the population) and covered only two months instead of a year (this is the only reason for calling it a pilot study). Blown up to full size, this survey would represent 60'000 interviews compared to 18'000 in the French "Etude Budget-Temps".

## 2.2. Visual Aids

We refrained from using visual aids in the interview (such as the list of activities) mainly for two reasons:

- 1) Any list distributed beforehand results in an uncontrollable bias of the person and evokes different hypotheses about the scope of the survey and subsequent conditioning of the respondent.
- 2) The majority of the sample, both in the pre-tests (including persons who received the list before the interview) and the main study where no material was sent to the respondent, confirmed that visual aids were not necessary and might even prevent correct answers.

## 2.3 Length of the Interview

45 minutes average time! Any field operator will tell you, that this would never work on the telephone, or that it would result in too low a response rate. Maybe this was (and still is) the most critical point of the project - seen from the outside world. We were careful not to lie and talk about a ten-minute-interview. Instead we stated clearly that it would last "about half an hour" and received only few critical remarks about the length. There seem to be mainly two reasons for that. Firstly, the interview proved to be an interesting and even exciting experience. To review all the activities of a single day gives the interview an almost metaphysical touch. Secondly, there is a well-known psychological effect: an entertaining 45 minutes can be subjectively very short, similar to 30 minutes elapsed time. If you have ever seen a film twice, you will know the phenomenon. The first time seemed to last longer.

## 2.4 Programming the CATI System

This proved to be a far more important challenge than the length of the interview. The problem was twofold: on the one hand the interviewer needed some kind of overview to visualize the time structure of the interview, to see which activities had already been registered and where modification should take place. On the other hand the modification process itself is complicated, given the absence of graphic interface and a mouse device to move around. It would improve validity and cut down interview time, if such a system could be developed for a future survey of this kind.

One advantage of the CATI wasn't used at all in the time budget part of the interview, namely the possibility to control the coherence of the answers given. After discussing the necessary conditions (e.g. sleep cannot have any other activity in parallel), listening to the interviews and finding exceptions for any condition we developed, we decided not to use this remarkable tool, but to prevent inconsistent information by training and eventually treating it for the reporting. This was a good decision, because it prevented the interviewer from explaining why the computer wouldn't accept the answer of the person on the phone. I remember a man, sitting in a plane at 03.00 hrs. dozing and reading because he couldn't sleep. By this we managed to prove that you can read while sleeping! Not the best argument for the print media, I admit. Of course, you can identify this reading session on the tape and filter it out in case of any analysis for advertising purposes.

Our main concern was to register the answers as "purely" as possible in order to refrain from any strain on the person to be interviewed. I am sure that this is the secret, why many people experienced excitement in this long interview. They just kept telling you in their own words how they lived the day before and what they felt, only to be jolted gently from time to time by a question such as: "We've reached 23.00 hrs. but what happened when you shut down the TV set?". Some people kept on reading!

**2.5 Training of Interviewers**

I would be lying if I told you that we expected to do the average training we do for the National Readership Survey. In the end we did a lot more and had some experienced interviewers asking not to participate any more in this kind of survey. But the others (mainly young persons) did an excellent job, as we could see (and hear) by intensive monitoring. Training is the key to much of the validity, rather than a clever CATI programming.

**3. Models of Data Analysis**

There are two ways in which we use the data provided by this time budget survey: a) A direct comparison of radio, TV and print media based on ratings, and b) a look at the sequence of media use across a day and a qualification of the contacts for advertising purposes.

**3.1. Comparison by Ratings**

Whoever wants to establish a comparison on a quantitative level, has to serve the media and the advertisers at the same time, that is sellers and buyers of media space. Contrary interests can only be tackled by compromise. So, what is the compromise of the Swiss model? As a matter of fact, there isn't any compromise at all. It is a proposition from one of the players, to meet, discuss and finally decide on an industry standard.

What the advertising world is looking for is a powerful planning tool to predict the effect of a campaign and control it afterwards. How can we develop such a tool? By reducing a complicated task to a fairly simple one, the price of which is in acceptable relation to the budgets to be decided. And in Switzerland this price is usually paid by the media<sup>1</sup>. So it is up to the media to prove their positive effect on the success of advertising.

If we examine only the advertisements (spots or printed ads), we are not able to filter out the influence of the medium. But if we take into account the surrounding editorial space as well, the influence of the medium will prevail. This is exactly what we did. We established a relation between the distributed space (print media) or time offered (radio, TV) and its actual use. The all-important fact is that print media are measured based on space and electronic media based on time.

	<b>Electronic Media</b>	<b>Print Media</b>
<b>Offer</b>	time period with advertisements	distributed copy with ads
<b>Rating</b>	rating in this time period	part of pages read <sup>2</sup>

Now comes an important step. Since the ratings of electronic media in this survey are similar but not the same as in the syndicated research and a rating for print doesn't even exist, the publication of these data would not have been accepted. So we established an index (only for media categories and not single media) that shows for any target group the extent to which it differs from the universe. The rating itself is not published, and no values are given for single media, because the database is too small for that purpose.

What does this index mean? It does not indicate how many users a medium has among a target group (this is up to syndicated research), but how intensely the target group uses a given medium. Graph 1 shows the index for the universe, which is set to 100 for all media categories; graph 2 represents a target group. An index below 100 means that the media category is less intensely used by the target group and vice versa. We deliberately mixed up advertising and editorial space to show partly the influence of the medium.

<sup>1</sup> the only exception is a private lifestyle survey that takes its funding mainly from advertisers.

<sup>2</sup> read or flicked through

### 3.2 Media use Throughout the Day

This kind of analysis shows how often, how long and under what conditions media use takes place. It may to some extent even suggest why. Graphs 3 and 4 show this in respect to a function: information vs. entertainment. This is not simply a general statement of what a person uses a medium for; it is a precise indicator for that single medium and that specific moment, and is thus related to a specific editorial content. It is therefore a much "harder" fact than any general consideration about a "prevailing" function. Graph 5 gives a comparison, based on time spent with a specific function for several media categories (including the reading of books during leisure time).

### 4. The Basis of Success

One of the most important lessons we learned from our French colleagues concerned the data output. The survey produces such manifold and complex results, that reporting by tables would never allow the direct access to their meaning we intended. The output must make sense to an average marketing manager (knowing that no marketing manager would consider himself being "average").

So we thought a) that a graphic (i.e. analogue) presentation would do a far better job than traditional tables on paper (a kind of digital interface) and b) that the analysis must be interactive (online on screen). Several graphs reflecting different aspects of the same analysis (same target group) should be visible at the same time, or different analysis (target groups) of the same aspect (for example time spent with a certain activity) should be comparable directly on screen.

All users of the software were fascinated by the ease of use but remained confused by the meaning of the graphs. Analysing an answer to a specific question leads to more questions of the kind "what if...". To prevent frustration, access to the answers must be direct and fast. And concerning the uncertainty about the meaning, we systematically used a certain type of graph for a certain kind of information (cf. graph 6). There is still much training needed to "fly", even when the "cockpit" becomes as simple as in modern aircrafts.

### 5. How Can We Promote the Print Media?

Of all the information that is not provided by traditional syndicated media research, I cite three aspects:

- 1) When people wake up, the first media they turn to are radio and dailies; TV makes only half of its contacts before 7.30 in the evening. Therefore print media deploy their impact to a large extent before TV.
- 2) Print media are less used for entertainment and more for information purposes than electronic media (with a positive effect on ads).
- 3) While reading is by itself a consciously directed activity<sup>3</sup>, listening to radio or viewing television can be a secondary occupation. The survey shows when and to what extent radio and TV are used "all the time" or only "partly" (watching or listening to an entire programme or only part of a programme).

### 6. Synthesis

- 1) Print media need to provide advertisers with specific information about intermedia relationship if they want to participate in decisions about media strategy.
- 2) The Swiss model, a further development of the French Time Budget Survey, is able to provide this information on a quantitative and qualitative level. It produces no kind of data that is already available by syndicated media research and is thus complementary to traditional planning systems.
- 3) The Swiss model embraces extensive information useful in the promotion of print media. Reading is a much more prominent activity than one might think. Dailies (and radio) for example, are "contacted" early in the morning, long before the TV is turned on.

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<sup>3</sup> "Flicking through" is not a negative mode of reading but rather a necessary condition of this activity. The eye identifies, by active "scanning" of the pages, those contents that are interesting for the reader. All advertisements being present on a scanned page have an opportunity to be seen.

- 4) The CATI telephone interview technique can be used for this kind of survey, with all its advantages. Interview time for example, can be reduced by 25%. But the special skills of CATI programmers and intensive training of interviewers are required.
- 5) The large mass of data can be analysed in an almost unlimited number of ways. Powerful software has been developed for interactive use. The primary representation of data consists of graphs on screen (up to 9 in parallel, depending on screen size). Tables are no longer necessary and are rarely used, because the process is more important than the result.

Print media in Switzerland play an active role in developing useful planning tools for advertisers. Therefore they can better defend their interests. They also gain a valuable insight into the development of new media, such as audiotex or online services - an area that presents a major challenge.

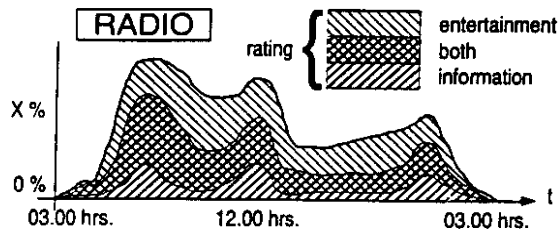
Graph 1: Use of media (time vs. space)  
referring to the population

TV	Radio	Print
Swiss stations 100	Swiss public 100	Dailies/weeklies 100
Foreign private 100	Swiss private 100	Magazines 100
Foreign public 100	Foreign stations 100	100

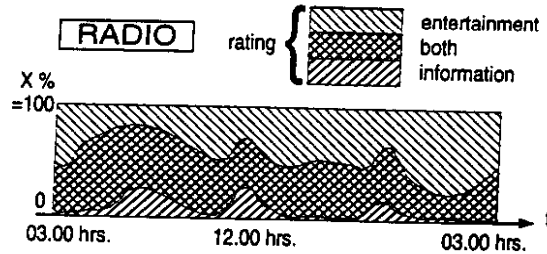
Graph 2: Use of media (time vs. space)  
referring to a target group

TV	Radio	Print
Swiss stations 84	Swiss public 57	Dailies/weeklies 113
Foreign private 92	Swiss private 124	Magazines 64
Foreign public 104	Foreign stations 107	64

Graph 3: Function of a medium (radio)

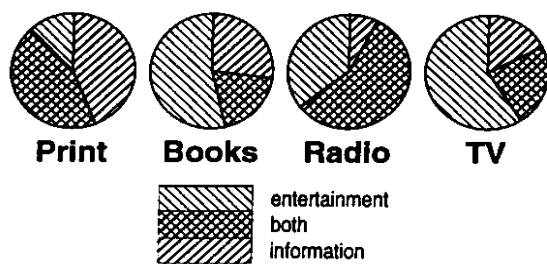


Graph 4: Function of a medium (radio)





Graph 5: Function of different media



Graph 6: Types of graphs

