The analytical potentials of survey trend data from market research: the case of German media analysis data

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The Analytical Potentials of Survey Trend Data from Market Research.
The Case of German Media Analysis Data

Jörg Hagenah & Heiner Meulemann [*]

Abstract: *»Die analytischen Möglichkeiten von Trendumfragen aus der Marktforschung: Der Fall der Media-Analysen«*. The design and the content of the Media Analyse, a repeated survey of media use for the purposes of market research, are described. Then, the analytical potential of these data is demonstrated by examining the question whether the introduction of the Dual Broadcasting System in Germany after 1984 has increased the preference for TV in the population – which indeed it has.

Keywords: Survey Data, Trend Data, Long-term Social Processes, Longitudinal Analysis, Macro-Micro-Link, Media Sociology, Media use.

In Germany as well as elsewhere, publishing and broadcasting companies need to know their "advertising currency" in order to offer space and time in newspapers and broadcasts to their customers at justifiable prices to targeted audiences. In Germany as well as elsewhere, this task cannot be accomplished by a single company, but must be tackled collectively by a publishers' association which organizes the necessary large scale market research and offers it to each of its members. Moreover, as audiences are whimsical and fads and fashions change, this research has to be repeated continuously in order to find current prices. In Germany, the Media Analysis Group (Arbeitsgemeinschaft Media-Analyse = AG.MA) has been founded to serve this purpose. It is the association of more than 250 publishing houses and broadcasting companies. Since 1954, it has continuously commissioned surveys on media use of the general German population to inform virtually every specific media supplier about their audiences. The products of this endeavor, the so-called *Media Analyses* (*Media-Analyse* = MA) and its predecessor studies, the *Reader Analyses* (*Leser-Analyse* = LA), provide an excellent example how commercially driven research can become very useful for academic research later on.

Once their original aim has been attained, the LA and MA – in the following we mention only the MA when we refer to the whole series – can be used for

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secondary analyses in university teaching and research. Due to the extraordinarily long time period covered, the substantive comprehensiveness (all media, time budgets of an average week day, broad socio-demography), the largely constant question program and the extremely large sample size (up to 60,000 respondents) they offer outstanding opportunities to analyze the changing media uses as well as social and cultural change in West-Germany – and from 1992 onwards also in East Germany (Hagenah et al.2006).

This paper aims at demonstrating the analytical potential for the historical study of the media use from 1952 up to today. To do this, we describe in section 1 the design of the MA, and then show in section 2 their analytical potential using an example: How has the introduction of the dual broadcasting in Germany in the late 1980s affected TV use among during leisure time?

1. Design and Topics of the MA Surveys

1.1 Chronology of Data Collection

The chronology of the MA surveys, the surveying mode, the administration period, and the media covered are presented in Table 1.

Table 1: Chronology of the MA survey design

Years	Study	Survey mode	Administration period	Media covered
1954 – 1958	LA	face-to-face	Bi-annual	Press
1960 – 1971			Annual	
1972 – 1986	MA			Press + Radio/TV
1987 – 1996	MA PM MA EM			Press Radio/TV
1997 – 1999	MA PM MA Radio		Semi-annual* annual*	Press Radio
2000 –	MA PM MA Radio	face-to-face** CATI	Semi-annual***	

PM = press media (newspapers, magazines); EM = electronic media (Radio, TV)

* 1998: Two semi-annual surveys MA Radio; one MA PM

** Since the second PM 2004, at least 10% of the interviews have been realized with the method of CASI (Computer-Assisted Self-administered Interview; www.agma-mmc.de, 2005).

*** Only one survey MA Radio in the year 2000.

The LA was administered and published bi-annually from 1954 to 1958, and annually from 1969 to 1971. As the electronic media were also covered in the

surveys from 1972 onward, the name was changed to MA (Buß 1998: 77). Until 1986 the MA covered the use of all media (radio, TV, newspaper, magazine, cinema) in one single survey. Since 1987 it was split into the two tranches *press media* (PM) and *electronic media* (EM)[1]. From 1972 to 1999, interviews were conducted face-to-face. Since 2000 the MA Radio is administered by CATI (Computer Assisted Telephone Interviewing) while MA PM is still administered face-to-face.

The population to be sampled is defined as the "German population, resident in private households at the place of the main domicile and aged 14 and more years" (Ebert 2003, 149; Klingler/Müller 2000). Up to the mode change in the MA Radio 2000, this population was sampled by the three-stage random sampling technique of the *Association of German Market and Social Research Institutes (Arbeitskreis Deutscher Markt- und Sozialforschungsinstitute =* ADM). Its first stage is an area sample, its second stage a random-route sample of households, and its third stage a random sample of respondents within households (Hoffmeyer-Zlotnik 1997; Behrens/Löffler 1999). After the transition to CATI the sampling procedure was based on telephone numbers (Gabler/Häder 1997).

Every year, the data are given to the section *"Data Archive and Data Analysis" of the GESIS – Leibniz Institute for the Social Sciences (former known as German Central Archive for Empirical Social Research or Zentralarchiv für empirische Sozialforschung = ZA)* one year after their dissemination to the original clientele of publishers. As of today, LA files from 1954 to 1971 and MA files from 1972 to 2006 have been delivered to the ZA and are prepared for longitudinal analyses by the *Medienwissenschaftliches Lehr- und Forschungszentrum der Universität zu Köln (MLFZ)* in ways described in the following section.

1.2 Data Processing at the MLFZ

The original MA data are stored in binary format. Therefore, they cannot be opened easily with SPSS or other statistical program packages commonly used in the social sciences. There are three reasons for this: 1. Punch card storage was the conventional procedure at the beginning of the survey series in the 1950s. 2. Members of AG.MA need not worry about formats because they do not work with the original data sets as a rule, but with aggregate measures and probabilities computed by special programs like "DAPCross". 3. The large sample size and the large number of variables require a space saving procedure which is furnished by binary compressing storage using all byte fields.

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[1]   The electronic media tranche MA EM includes radio and TV data. Since 1997 the MA EM focus primary on radio use. Since 2000 the AG.MA calls this tranche Radio.

In order to make the MA easily available for scientific analyses, the data have to be converted into a SPSS compatible format using the SPSS syntax. The MLFZ has converted 14 LA and 400 MA files from 1954 to 2006 for SPSS-use, and continuously converts the newly incoming files. Furthermore, the original questionnaires and the code plans have been archived in the MLFZ; the scanned questionnaires can be downloaded free of charge from the MLFZ homepage (www.mlfz.uni-koeln.de). Thus, the data can be conveniently used under the usual conditions (citation of donor, no further distribution) for scientific purposes – in particular, for doctoral, diploma, and master theses, and seminars or research practice courses in communications, social and economic sciences. They can be ordered by letter or fax from the MLFZ; depending on size, data will be sent as e-mail attachment or on CD-ROM or DVD.

Moreover, the MLFZ has developed the service-tool "madatsyn2.0" in order to allow an overview over the tremendous number of titles and channels – more than 41.000 (Hagenah/Akinci 2003). It takes stock of all variables surveyed between 1954 and 2006, indicates when and how often they have been replicated, and gives the variable number they have been assigned in each data set.

Finally, the MLFZ has labelled and harmonized the variables and aggregated the data over time. As of today, press data sets have been aggregated from 1954 till 2006, and electronic media data sets from 1977 till 2006. Additionally, the socio-demographic data have been aggregated from 1954 till 2006.

1.3 Recent Publications using MA Data

These steps of data processing have facilitated publication activities. Until 2002 only a few scientists used the MA for secondary analyses (Kubitschke/Trebbe 1992; Weiß/Hasebrink 1995, 1997; Schönbach et al. 1997; Lauf 1999) and longer time series have not been produced at all. After 2005, however, not only the personnel of the MLFZ (Meulemann et al. 2005; Hagenah 2006; 2006a), but the scientific community has increasingly used the MA for secondary analyses. Some of this work has been collected in two edited books (Hagenah/Meulemann 2006, 2008). More specifically, analyses of the use of newspapers (Becker 2007), the newspapers and the internet (Bentlage 2008) and the TV (Gilles et al. 2008; Best/Hagenah 2008; Hagenah et al. 2008) have been published. Further analytical potentials are demonstrated in the reports of a research training course at the University of Cologne (Hagenah/ Meulemann 2007 a-e) and in quite a few Diploma und Master theses (e.g. Ehrenberg 2005; Frisch 2005; Risel 2005). Finally, since 2007, the MLFZ produces the weekly online newsletter "media trends and social change" which contains short trend reports on the use of newspaper, magazines, radio, TV and internet and on social change.

1.4. Analytical Potentials for Secondary Analysis of MA data

Although the main topic of the MA is media use and its socio-demographic determinants, it also contains information on some attitudes, behaviour, and time budgets. This very broad range of topics opens up such a wide array of analytical possibilities "that the globe would no longer exist if someone performed all of them" (Scheler 1979: 1369; our translation). We give a brief overview of the contents– first for the core data on media use, then for the socio-demographic and further data.

Media Use

Media use information has been collected in two ways, labeled *non-specific* and (channel- or title-) *specific*. The *non-specific media use* is surveyed in three modules:

1) *Leisure activities frequency scale*: The frequency of the use of radio, TV, newspapers and magazines as well as visits to the cinema and other leisure activities, such as sports and entertainment, has been surveyed on a five-point scale from "never" to "several times a week". Unfortunately, as most people view TV and listen to the radio nearly every day, this scale does not differentiate TV and radio use precisely enough. Nevertheless, it captures the weight of media among other leisure time activities (Wahl 2003).

2) *Weekly frequency of radio and TV use*: How many days of a normal week has radio or TV been used, and was this in the early morning, late morning, noon, during the afternoon or in the evening?

3) *Availability (since 1966) and numbers (since 1984) of TV and radio sets in the household*: This was surveyed continuously from the beginning of the MA survey along with other questions on technical equipment in the household.

Specific media use is surveyed in three consecutive modules and – fourth – in the time budget module:

1) To start, the *general filter* question ascertained whether each channel or press title available at the time of the survey had been ever heard, seen or read before.

2) For the titles mentioned, then, the *time filter* ascertained the time point of their last use.

3) And again for the titles mentioned, the *frequency module* inquired as to how many days per week a radio program or TV channel was listened to or watched, and how many of the last 12 issues of a magazine were read.

4) The *time budget* module ascertained *first* the dominant activity for each quarter of an hour between 5 a.m. and 12 p.m. of the previous day, and *second* whether media have been used during these activities and which.

From this information, the total time devoted to radio or TV use can be computed – as well as their timing during specific periods of the day. Moreover, further activities inside and outside the household were surveyed and similar indices constructed. Each of these four modules allows a comparison between radio, TV, and press.

Socio Demography, Attitudes and Behaviours, Time Budget

The socio-demographic information comprises gender, age, education, employment status, occupation, net income and family status since 1954. Over the decade that followed, denomination and household structure (income, number of persons, children) were added. Inevitably, the response alternatives changed occasionally during this time. For example, age, which is indispensable for cohort analyses, was asked in two ways. From 1954 to 1968, interviewees had to choose among age brackets. From 1969 to 2006, it was asked for the age in years at the time of the interview. Nevertheless, the enormous sample sizes make it possible to examine changes in the social structure – e.g. educational expansion, shrinking self-employment, tertiarization – in groups disaggregated according to age, gender or region. Cohort analyses with 21 5-year-groups from "1895 and earlier" until "1991 to 1995" are possible.

Moreover, a few specific consumption-related attitudes and behaviours have been included in some of the surveys: dietary attitudes, plans to buy durable goods, use of public transport, travel and leisure activities, shopping behaviour, home ownership, ownership or rental of a garden, possession of household articles and animals. Although some of these items have been introduced only recently, the way how their possession is interrelated can be analyzed, sometimes even in a time perspective. Beyond the domain of consumption, political party preferences were surveyed 29 times between 1977 and 2006. Moreover, the cooperation of the respondent was measured in 50 surveys between 1977 and 2006 such that the determinants of the decreasing willingness to cooperate in the interview which plagues survey agencies can be examined in specific groups and recommendations for future field work can be developed.

Last but not least, the time budget module already mentioned above inquires into time devoted to sleep, personal hygiene, housework, eating/cooking, work, studying, leisure time, commuting, shopping, visiting friends or relatives, and going out to bars or restaurants (Klingler/Müller 2004, Gilles et al. 2008) so that changes in these activities "at home" or "outside the home" can be examined.

2. Linking MA Data with Context Information: Increased TV Use and the Dual System of Broadcasting

In this section we demonstrate the analytical potentials of the MA Data using the increased TV use after the introduction of the Dual System of Broadcasting in Germany after 1984 as an example. Thus, we "enrich" the MA time series simply by complementing them with concurrent societal trends.

2.1 The Dual Broadcasting System and the Increase of Choices

Up to 1984 there was only public broadcasting in Germany which was – and still is – financed predominantly by obligatory fees. From then on, radio and TV channels have been established which are exclusively financed by advertising revenues. The increase of the number and the variety of TV channels may have increased the fraction of leisure time people devote to TV, that is, their *relative TV time.*

The relative TV time expresses a person's *preference* for TV within his or her leisure time. In general, such a preference should not increase as the absolute leisure time increases. If someone has two hours leisure time at his disposal of which he devotes half an hour to TV, he will devote an hour to TV when the leisure time increases to two hours. In other words, if somebody's *resources* – in particular, somebody's leisure time – increase only he will not change his preferences, but allocate the increased resources according to the constant preferences. Thus, he will not restructure his preferences in favour of TV and to the disadvantage of – say – sport, unless the supply of TV or the opportunities of sports have changed considerably. However, with the Dual System opportunities may have changed in just such a way as to increase the preference for TV.

The increased number of channels has increased the range of options for everybody's specific interests. A sports fan, who formerly was restrained to choose between a few broadcasts in very specific time slots, can now choose between many sports broadcastings nearly all over the day; the same applies to the politically interested, the culturally interested, to every special interest group, in sum: to the general audience. Thus, the Dual System might have increased relative TV time and shifted the preference structure of the audience in favor of TV and away from other leisure pastimes.

This shift is independent from increases in *absolute TV time* in minutes. The absolute TV time expresses the preference for TV, given the resources. It depends on the opportunity "leisure time" and should have increased for the simple reason that leisure time has increased, as it has in Germany between 1950 and 2002 (Meulemann 2005: 302). The *relative TV time*, however, being calculated as a fraction of the total leisure time, expresses preferences only.

With these two measures at hand, one may examine the different impact of two developments on the TV use. An increase in the absolute TV time should predominantly reflect an increase of leisure time, while an increase in the relative TV time should reflect an increased preference for TV. Has the introduction of the Dual System after 1984 indeed increased the preference for TV in the German population?

2.2 Data and Results: TV use within the time budget

The time budget module administered in the MA between 1987 and 2005 allows an answer to this question. It consists of two steps. In the first step the respondent has to assign some activity category to every quarter of an hour between 5 a.m. and 12 p.m. These activities can be summed up into the broader categories sleep, reproduction, work and leisure. In the second step the respondent must specify for every quarter of an hour, which media he has used. Thus, the absolute and relative times of media use within each of the activities, in particular within leisure, can be easily calculated for the whole day or any user-defined fraction of the day on the level of the individual respondent. The development of the broad activity categories just mentioned and of the *absolute* and the *relative* TV time within leisure time are presented in figure 1.

If one looks at each time point as a cross-section, the absolute times, which are presented as grey full lines and refer to the left hand scale, are ordered in the same way for each year. Leisure takes the lead, followed by work, by sleep (on a low level, because the time budget refers to 5 a.m. and 12 p.m. only), and finally by reproduction. If one looks at the developments over time, leisure remains constant until 1999 and increases somewhat thereafter. Conversely, work and reproduction decrease somewhat. And sleeping remains constant. Thus, the opportunities to watch TV have increased. Have the two TV times increased as well?

The absolute TV time, for which still the left hand scale applies, increases more or less continuously from 127 to 180 minutes. The sudden increase in 1991 has probably been triggered of by the reports on the Iraq war (Brosius 1998). Moreover, East Germans who more often watch TV than West Germans (most recently Zubayr/Gerhard 2008: 110) are included in the sample since 1992, which explains the further increase persistent until 1996. Nevertheless, both events do not fully explain the increase over the whole period. In separate analyses of both parts of Germany similar increases of the TV time show up. Thus, the absolute TV time grows with increasing leisure time – as a reflex of the increasing leisure time.

Figure 1: Daily activities from 1987 to 2005
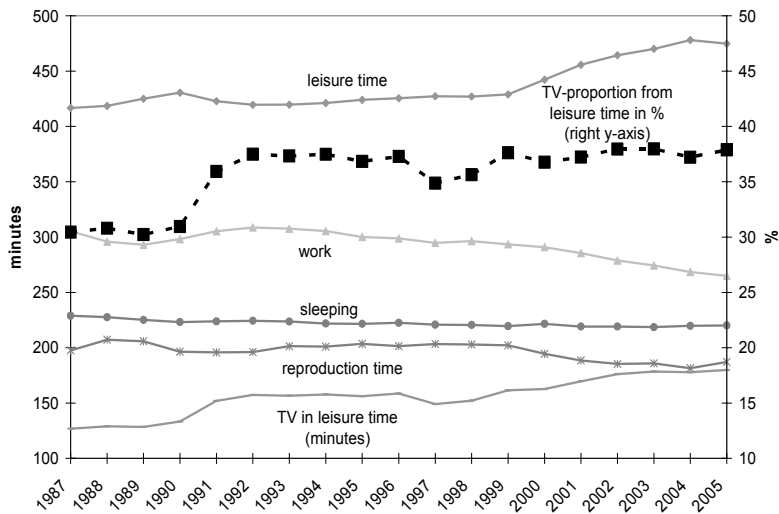
The relative TV time, which is presented in black dotted lines and for which the right hand scale applies, increases from 30.5 to 37.9% over the whole period. Until 1990, there is only a slight increase up to 31.0%. But in 1992, the relative TV time jumps up to 37.5%, in order to increase only slightly thereafter. The effect of the Iraq war can be detected again, but the inclusion of East Germany no longer shows its effect. Again, separate analyses of both parts of Germany show an increase over the whole period. Thus, the relative TV time increases as well – the increasing supply must have shifted the preferences of the audience in favor of TV.

To sum up: The increase of the TV time is not only triggered off by the increase of the opportunity "leisure time", but it reflects an increase of the preference for TV as well. People do no only enjoy an increasing leisure time, but use it more often to watch TV. The introduction of the dual broadcasting system made TV watching more attractive. "Competition stimulates business". But the competition in one area of leisure industries – media – affected other, mostly public, areas negatively. Sports and culture, clubs and restaurants, theaters and museum were not able to parry the increasing attractiveness of TV. They lost – although seemingly their supply must also have increased considerably: A lot of new museums, theaters, arenas etc. has been established recently, events of all sorts – from motor rallies to nightly opening hours of museums – have been fostered by communities, companies, and associations. Yet they could not keep up with TV. Moreover, a completely new media activity has come up during the same time, namely the internet; and even the internet could not dampen the increasing preference for TV. Whether these remaining

leisure industries did indeed increase their supply in proportion with TV or not, and why it did not succeed remains a question for future research.

5. Conclusion

The accreditation of private TV channels in the 1980s in Germany was an example for demonstrating the analytic potential of the MA. There are many others possibilities. Within communication research, similar analyses could be carried through for the radio. Moreover, intermedia use could be analyzed: Is there complementarity or substitution between the media? Beyond communication research, social and economic questions can be treated. The MA provide information on education, occupation and income from 1954 to today so that the educational expansion can be studied in detail. In particular, it can be examined whether the expansion of education has decreased the returns on education.

Of course, the MA surveys are no panel data. But even as repeated surveys, they allow more specific longitudinal analyses as presented here. In particular, they allow cohort analyses dueto their exact age codes and their large sample sizes. Thus, it has been shown that the decrease of the public TV channels and the increase of the private TV channels in Germany reflects in part the succession of older cohorts which stick to public TV by younger ones who prefer private TV (Meulemann et al. 2009). Similarly, the introduction of the internet in Germany – measured by using the internet at least three days a week – follows the logistic curve of a diffusion process. But its saturation point does not seem – as of 2006 – to be over 90%, as it used to be with most of the earlier technical innovations, such as TV and telephone. Rather, it is close to 40% in the total population and close to 60% even in the youngest cohort (Sarling 2009).

Finally, the analytical potential of the MA data can be increased by combining them with data of the program structure. As every respondent reports his general activities together with his media uses for each quarter of an hour between 5 and 23, the audiences of specific genres – such as news reports or talk shows - can be in principle followed up over time. However, this requires a lot of research on the program structures of the channels and a lot of work to pool the data. As of today, the audiences of the news reels of public and private channels have been compared and their media use before and after the news has been examined. As it turned out, the news of public channels serve as a portal to the evening program for the same channel while the news of private channels are consumed more or less as an unavoidable interlude (Gilles et al.. 2008).

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