

## **MEASURING NEWSPAPERS AS MEDIA BRANDS**

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### **Introduction**

Newspaper publishers now deliver content in a variety of digital formats on a variety of devices. While readers of printed newspapers still make up a large majority of most newspapers' total audiences, readership of digital formats is significant and growing and is clearly expected to be a major factor in the near future. As the currency service for U.S. newspapers, Scarborough Research must measure total newspaper audiences (as well as the constituent parts). In an environment of increasing digital options, this will likely require significant changes in how we question respondents.

Scarborough conducts interviews by telephone using traditional platform-by-platform questioning. The interviewer names a platform (e.g., weekday paper newspapers), screens the respondent on a list of newspaper titles, and asks follow-up readership questions about each title on which the respondent screens in. The process is then repeated for the next platform (e.g., Sunday paper newspapers), then the next, and so on. The platform-by-platform approach is consistent with industry best practice standards. Scarborough has successfully added separate platform sections for the earliest and still largest digital newspaper platforms – websites and e-editions – but it will obviously be impossible to continue adding new platforms indefinitely.

Scarborough recently embarked upon a program to develop and test a different questioning approach, reversing brand/platform order. The basic idea is to screen on newspapers as media brands first. After a respondent screens in to a media brand, follow-up questions cover formats, devices, recency of exposure, etc.

An initial pilot test was fielded in July 2011. Results are promising but mixed. Respondents understand the media brand concept and the test interview is relatively easy to administer. However, it appears that the revised interview approach, at least as tested, may lead to lower reported audience levels. Additional testing will follow, to more fully assess potential quantitative impact and to explore alternative executions.

### **Background**

Scarborough has been the currency audience measurement service for U.S. newspapers for almost 40 years. For the first 30+ years, only two newspaper platforms were measured in most markets – Daily (i.e., Monday through Friday) and Sunday paper editions. In some markets a third platform, Saturday paper editions, was also measured.

Websites were added as a separate platform in 2005. Daily and Sunday e-editions were added as separate platforms in 2010, along with a separate Saturday e-edition survey section in markets where Saturday paper editions were already measured. Currently, Scarborough asks about exposure to some form of newspaper content in a minimum of five separate platform sections in every market, with seven separate sections in markets with Saturday edition measurement.

Within each platform section, the question sequence follows the same pattern. The interviewer names the platform and reads the respondent a list of brands/titles, asking about exposure to each title in the edition-appropriate screening time interval (e.g., past 7 days for Daily editions). For screened in titles, the respondent is then asked about exposure in the edition-appropriate average-issue time interval (e.g., yesterday for a Daily edition).

This approach is consistent with long-held industry best practice standards, as codified in ARF Guidelines and ABC Readership Profile standards. However, it is clear that continuing to add new question sections for each new digital format is not a sustainable long-run strategy.

The website and e-edition sections added in 2005 and 2010 increased the average interview length by more than five minutes, extending what was once a 15 minute interview to more than 20 minutes. This is close to the upper limit for a high quality telephone interview. Beyond the time burden, reading the respondent the (mostly) same list of titles section after section (with typically very low platform/title incidences) is awkward and dulls respondent interest. Moreover, adding separate sections for each platform is a reactive approach that is always out of date. The Appendix outlines the staggering array of digital formats newspapers already offer, and the pace at which new digital formats are being introduced seems to be accelerating. We need a questioning approach that is flexible enough to capture reading on all platforms and pick up new platforms as they emerge.

## Modified Questioning Approach

The most direct way to address these concerns is to reverse platform/media brand question order – to start with a media brand screener and then follow up on screened in brands with relevant questions about format and/or device and the time-related questions required to establish average and cumulative audience. This change would reduce the use of repetitive lists and focus questioning on what the respondent did rather than did not do, making for a shorter and more engaging interview. The number of possible platforms, provided individual readers avail themselves of only some, would not appreciably affect interview length. Capture of open-ended responses would automatically keep up with new platforms.

Two possible versions are under consideration. The “pure” version uses a single media brand screener, covering all paper and digital platforms at once. The “mixed” version maintains separate sections for paper and digital platforms, with a single media brand screener in each (i.e., one for all paper platforms, including Daily, Sunday, and Saturday editions, and a second for all digital platforms). Though the “mixed” version would take respondents through the brand list twice, it might be easier for respondents to concentrate on and facilitate different (and appropriate) follow-up questioning for paper and digital products separately.

## Pilot Test

A possible change to currency methods cannot be considered without significant development, testing, and user community discussion and buy-in. As a first step, Scarborough conducted an initial pilot test of the “pure” version of the brand-first questioning approach.

Test questions were:

- Media brand screener:

*“In the past 30 days, have you viewed, read, or looked into any published articles, in print or on the Internet, and please consider all forms, including printed copies, e-editions, websites, and mobile apps, from the (Insert Newspaper Brand)?”*

- For each media brand the respondent screened in on, the platform question was:

*“When you viewed, read, or looked into the (Insert Newspaper Brand), was it: (Read answer choices)*

- *The printed paper edition?*
- *The website?*
- *The e-edition?*
- *Any other format?”*

For each brand/platform the respondent selected, follow-up questions included Daily and/or Sunday for paper and e-editions, format details for “Any other format,” and appropriate time intervals for all platforms.

Other elements of the pilot test design were:

- A total of 1,048 test interviews, in two standard Scarborough markets. One was a large market in the Southwest, the other a mid-sized market in the East.
- Interviews conducted in English only, by Scarborough interviewers calling from Scarborough telephone centers.
- In field from July 14 to July 30, 2011. This time restriction required a truncated calling regime, omitting standard mailed refusal treatments and some callbacks and refusal conversion attempts.

- In so far as test sample sizes permitted, completed test samples underwent standard Scarborough post-field processing, including weighting/projecting to Census universe estimates by geography, sex/age, household size, education, race and ethnicity.

**Test Results**

One goal of the pilot study was to see if the test questionnaire structure “worked.” Do respondents understand the media brand concept? Are they able to identify, distinguish between, and answer questions about various newspaper content formats? Based on a qualitative assessment of interviewers and monitors, and the fact that about half of respondents answered affirmatively to at least one media brand, test results are encouraging. Respondents who did not screen in to any media brand were asked a series of questions about their use of print and digital newspapers and their access to other news sources, as a check for possible misunderstanding about the media brand question. Responses to these questions were also encouraging.

A second goal was to get an approximate assessment of the potential quantitative impact of brand-first questioning on audience levels. Here results are less certain. Table 1 compares weighted/projected average issue audience estimates by platform for the leading local newspaper (averaged across the two test markets) by the test interview, against corresponding estimates from the closest in time standard syndicated studies in the test markets (Release 1 2011).

Table 1: Test vs. Syndicated Audience Estimates

Leading Local Newspaper (Average of Two Markets)

<u>Average Issue Audience</u>	<u>Test</u>	<u>Syndicated</u>	<u>Index</u>
Daily Paper	12.5%	15.0%	83
Sunday Paper	21.0%	26.0%	81
Website (One Day)	2.0%	4.5%	44
Daily e-Edition	0.6%	1.1%	52
Sunday e-Edition	0.6%	0.9%	65
INA <sup>1</sup>	31.4%	36.9%	85

The good news here is that test audience levels are roughly comparable to syndicated and the pattern or rank order across platforms is the same. Lower test audience estimates, especially for digital platforms, are obviously cause for concern.

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<sup>1</sup> INA is Integrated Newspaper Audience, which is the net 7 day cumulative audience across all of a brand’s measured platforms. Some of the cumulative sub-components (e.g., 5 issues of the Daily paper edition) are not shown separately in the table.

Responses of “Any other format” are not shown in Table 1 because there are no Syndicated estimates against which to compare them. There were very few such responses in the test. “Mobile app,” “tweets/Twitter feed,” and “text alerts” were all listed as possible answers for the interviewer to record (but not read to the respondent). Across 1,000+ respondents and all media brands, there were a total of only three mentions of mobile apps and no mentions of either tweets or alerts.

Before discussing consequences and next steps, it is also worth noting that 1) the test-syndicated differences shown in Table 1 are not statistically significant at the 95% confidence level and 2) the test interviews were all conducted in the last two weeks of July 2011, not a likely time of high news consumption, while the syndicated interviews were spread over six months of fieldwork, from August 2010 to February 2011.

### **Discussion and Next Steps**

As of this writing initial pilot test results have only just become available. Given the critical importance of audience levels on the continuing development path and an eventual go/no-go decision, it is immediately clear that the next steps must be directed at understanding and addressing the reasons for the lower audience estimates observed in the test.

Possible explanations are:

- A spurious outcome of sampling error and/or the particular time-period in which the test was conducted. Though this seems unlikely, at least as a complete explanation, we are now looking into July 14-30 reading levels across all syndicated markets to determine if there is a seasonal component.
- Remediable flaws in the test interview execution. The pattern of relative test-control differences – smaller differences for platforms prompted earlier than for those prompted later, and larger differences by platform than in aggregate – suggests that some respondents who screen in to a media brand may subsequently answer only to the first platform they qualify for. Test interviews will be reviewed to look for evidence of this effect (interviews were recorded for this eventuality). If found, it could be addressed by better question wording and/or improved interviewer instructions.
- An inherent consequence of a single media brand prompt (rather than the up to seven prompts in the current standard Scarborough interview). After completing the analyses outlined under the two bullet points above, we plan to return to the field with a parallel test of the “pure” (single brand prompt) and “mixed” (separate paper and digital prompts).

### **Conclusions**

The growing delivery of newspaper content on digital platforms makes it a matter of some urgency that Scarborough develop a way to measure these platforms on a comprehensive and timely basis. We believe some form of brand-first questioning is the most promising approach. We are at the beginning of an aggressive program of testing and development and look forward to sharing new findings.

## Appendix: Some Current Digital Newspaper Delivery Offerings

Newspaper content is delivered in a staggering variety of digital formats. Following are some examples.

### iPAD, ANDROID & iPHONE APPS



Stay up-to-the-minute on Orlando news, sports, weather and more.

Get the FREE app for:

**iPad | Android | iPhone | Feedback**

“Apps” are programs to access newspaper content on consumers’ mobile devices, including smartphones and tablet computers. The two dominant app platforms are the Apple iPad/iPhone and the Android platform, as shown above for the Orlando Sentinel. Many newspaper apps can be downloaded wirelessly, for free. They allow the consumer to see and read content from the newspaper that is formatted specifically for their electronic mobile device, so the text, pictures, and other content are clear and readable and fit on their screen.

### BALTIMORE SUN:



#### Find more ways to connect with The Sun

The Baltimore Sun icons shown above come from the Sun’s website, and represent four different ways the consumer can connect electronically with the content of the Sun. In this example, the four icons represent Twitter, Facebook, Foursquare, and alerts. Twitter is a micro-blogging site that publishes an ongoing stream of concise “tweets” (text statements) of 140 characters or less to those who sign up to “follow” a specific person, brand, or media publisher such as the Baltimore Sun.

Facebook (FB) is the popular social media site which now offers specific pages for media, similar to those for persons. Fans can link to or “like” content from the newspaper site (click on a virtual thumbs-up button) through their FB account. They can also “connect through FB” from the newspaper’s website. Upon doing this, regularly refreshed content from the paper will be posted within the newsfeed section of the users “FB” account. FB may share information with the paper about the user’s demographics and shopping preferences. New forms of interaction with FB content are being introduced frequently, and media content sites are one of the popular selections.

Foursquare is a social media application that ties into a user’s current geographic location. When visiting a restaurant, for example, a user can “check in” with their mobile device electronically, to tell their friends where they are. The more places the user checks into and the more times they check in, the more rewards and prestige accrue to the user. This application facilitates people meeting in person when they are in a particular area at the same time, while also helping to publicize the location or event. When tied to newspaper content, Foursquare can help advertisers target consumers using their current geography, a new form of interaction between the consumer and the newspaper brand.

Breaking news, sports, or weather are some of the topics for which consumers can sign up to receive text “alerts”, through their mobile phones (using smartphones, or old-fashioned “not so smart” cell phones that can only accept text messages). This content offering is shown below.



Sign up for Baltimore Sun text alerts to receive the latest news, anytime and anywhere.

Another example demonstrates the Baltimore Sun’s mobile website offering its newspaper content to the smartphone user who is on-the-go, as shown below:



**Mobile site**

Our mobile site is designed to let you easily check the latest news, sports and weather, search for a restaurant or event, and much more. Get the information you need, when and where you need it.

From your mobile browser, go to: [mobile.baltimoresun.com](http://mobile.baltimoresun.com)

**ORLANDO SENTINEL:**



Twitter



Facebook



RSS



Newsletters



Blogs



Text Alerts

The icons shown above for the Orlando Sentinel include some additional formats for newspaper content: RSS feed, newsletters, and blogs. The RSS feed is a service that automatically updates content using a “feed reader”, a software application that receives and formats newspaper and other media content, and updates or refreshes it on an ongoing basis. Popular feed readers include Google, My Yahoo, Netvibes, and My AOL.

**CHICAGO TRIBUNE: FREE CUBS & SOX APPS**



Download award-winning Cubs and Sox content from the Chicago Tribune anytime, anywhere. For iPhone and Android.

Mobile alerts are available on the following carriers: AT&T, Verizon Wireless, Alltel, Sprint, Nextel, Boost Mobile, T-Mobile and U.S. Cellular.

The Chicago Tribune has specific content delivery for its sports coverage through free apps for the Chicago Cubs and Chicago White Sox baseball teams. Fans of Chicago baseball teams can sign up for ongoing updates from the Tribune’s editorial staff about these teams. They do not have to receive any other content from the newspaper if they choose not to.

The New York Times offers its website, mobile app, and e-edition as well as specific content available electronically, including crosswords, photo archives, videos, and podcasts. These are in addition to the myriad electronic options already mentioned.



**NYTimes.com - The world’s premier news site.**

**Enjoy unlimited access to the world’s finest journalism, with continuous coverage of the most important news, issues and newsmakers, plus provocative opinion and innovative multimedia.**

To summarize, instead of the single, straightforward “arrow” of traditionally formatted content delivered from the newspaper publisher to the reader in a physical paper product, the newspaper experience is now a buffet of different options, with new formats offering newspaper consumers continuously updated content, when they want it, on the device they choose.