

MEASURING THE BRAND AUDIENCE FOR REGIONAL NEWSPAPERS (PRINT & ON-LINE)

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Background

The UK has some 1800 regional newspapers and as with newspapers worldwide the internet has led to a great change in their market. About half of these newspapers now have internet sites and, of course, the proprietors want to market their total brand, not just the paper.

As an aside, many of these newspapers also have magazines and some radio and TV stations in their portfolio, but for this paper we will concentrate on the internet extension of their offering even though the principles of what we shall describe could apply to all aspects.

The regional newspapers have several problems in promoting their internet sites alongside their newspapers:

- 1) First, as with the newspapers themselves, most are small and will not be measured by general industry research, such as JICIMS
- 2) The conventional surveys carried out regularly by many of the regional newspapers themselves mostly have small sample sizes, in the region of 300-500. While this can measure overall exposure to the sites it obviously limits profiling when the sites themselves may only have less than 10% reach
- 3) The internet site is accessed from outside the distribution area of the newspaper, which is usually the sampling area for their surveys
- 4) Any site centric statistics are mistrusted by clients as there are no industry standards or audits.
- 5) Not all the newspapers can afford surveys
- 6) Even if the research issues could be solved then the internet sites, as with the newspapers, need to sell in combination if they are to get national advertising

These issues are similar to those that led to the establishment of JICREG, the regional newspaper database that comprises a mixture of surveyed and modelled readership data to provide for advertising planning.

The Portfolio Audience Project

The Portfolio Audience Project is an attempt to standardise the measurement of regional newspaper internet sites (and later other subsidiary media) and provide models that will enable all the sites to be included in the JICREG database, thus allowing cross media, national planning of these with regional newspapers.

As with JICREG itself the project has three main goals:

- a) To define industry agreed standards for measuring regional newspaper sites
- b) To collect what data are available for inclusion in the database and
- c) Then to provide audience models for the unmeasured sites.

In order to achieve these goals three initiatives have been undertaken:

- 1) Discussions to reach agreement on a site-centric measure that can be used across all sites as a benchmark of audience levels and change, in the same way as circulation is for newspapers.

It has been agreed that the measure should be 'unique visitors'. - Normally weekly and monthly, but for larger sites daily. This is not just a regional newspaper agreement but for the industry as a whole.

We hope that regional newspapers will start publishing a minimum of 6-monthly audited unique visitor audiences from early 2008. Until then the project will be based on un-audited estimates of unique visitors to sites.

- 2) The establishment of a central database of all regional newspaper sites and their links to specific newspapers.

This database has now been established by the Newspaper Society and includes some 400+ web sites along with many other media opportunities provided by the regional newspapers.

The setting up of this database has, in itself, generated much enthusiasm from the buyers who previously had great difficulty in getting such information.

- 3) The analysis of all recent survey data to identify
 - a. The best standard questions to be used in future
 - b. Whether it is possible to model the site audience profile
 - c. Whether it is possible to model the relationship between the site and its parent newspaper
 - d. Whether it is possible to model out of area web usage

This 3rd stage has been based on four main sources of information.

- 1) The database of websites that has been compiled by The Newspaper Society mentioned above.
- 2) Approximately 270 surveys commissioned by regional titles in the past 2 years that also include questions about the local web sites
- 3) Some new innovative site specific research from Survey.Com, which provides user profiles.

Initial data from this source was only made available to us in the second half of August, two weeks before the full paper had to be submitted, so its use here is limited. Hopefully we will be able to present more from this source at the symposium itself.

- 4) Un-audited site traffic data. (As mentioned earlier this will be replaced by audited data in 2008)

By far the largest part of the project has been handling the 270 surveys. This is because they have been commissioned by different companies, asked different questions, run by different research companies and made available in different formats.

Also, as more and more data becomes available from Survey.Com or similar sources that will extend the range of possible analyses.

As stated earlier the enhanced JICREG database will include a mix of survey data and modelled data, as it does for newspapers. In order to best explain how the modelled elements will fit in I will start by taking you through an example where actual survey data is available.

The Newcastle Evening Chronicle

The example I will use is the Newcastle Evening Chronicle and its associated website ChronicleLive

The starting point is the sites monthly unique visitor count (currently un-audited) and the newspapers monthly readership. These are:

	Monthly
Chronicle Live	104,099
Evening Chronicle	546,000

The Survey.Com research enables us to do the following to enhance the web statistics as follows:

- 1) Provide a more accurate estimate of human users, as unique users are measured at a computer or device level – this reduces the unique visitors count to 86,806

(The exact methodology used for doing this is proprietary but has been explained and accepted by the JICREG technical committee)

- 2) Calculate the extent to which these unique visitors are inside or outside the distribution area /research area for the newspaper.

In this case we see that

51,161	are in the area
35,645	are outside the area.
Indeed 17,650	are outside the UK

(While it is not really part of the remit for this project I have a personal theory that many of these comprise the expatriate Newcastle United football fans. This will become clearer as more sites are analysed.)

- 3) Analyse the profile of the users, across many variables. Here we can compare the profiles from the two surveys

Profiles
Evening Chronicle Area

	Readers (Readership Survey) (a)	Internet Users	Internet Users (Survey.Com) (c)	Index (c)/(a)
Male	48.0	57.9	45.5	95
Female	52.1	42.1	54.5	105
Age 15-34	29.3	47.4	25.8	88
Age 25-54	36.1	43.4	51.2	142
Age 55+	30.0	9.2	23.0	77
Class ABC1	43.2	71.1	61.1	141
Class C2DE	56.6	28.9	38.9	69

As we can see there are predictable differences in the profile of the web user (younger and more upmarket). The larger variations in profile of internet users on the readership survey are partly due to a small sample since total users are only 10% of the population, but also reflect recall problems. This illustrates why a combination of the two surveys is preferable.

- 4) Very importantly, analyse the visitors in terms of their frequency of reading the Evening Chronicle. Again using the same example the two surveys show:

Internet User Profile
Evening Chronicle Area

	Population (a)	Readership Survey	Survey.Com (c)	Index (c)/(a)
E.C. Readers	69.7	96.1	97.7	140
Frequent Readers	34.7	42.1	49.8	143

So we can see that users of the related web site are some 40% more likely to be readers of the parent paper and, though not shown in the table, the more frequent users of the internet have an even higher likelihood of being frequent readers with an index of 160.

(Survey.Com's method of collecting data and enabling such analyses is the subject of a patent application and therefore cannot be discussed in this paper.)

Integrating the databases for media planning

These data illustrate two things. First that we can combine the various types of research, where it is available, to allow the JICREG system to estimate both the internet reach and frequency and also the combined print/internet reach and frequency.

In other words, we can use these data to integrate the internet data onto the readership survey (or indeed vice versa) by allocating an internet usage probability to each reading frequency group (within demographics to the extent that sample sizes permit). That then allows for combined media schedule planning and reach & frequency analysis.

Modelling sites without research

As important however is the second finding that there are significant relationships between the use of the web site and the readership of the newspaper, not just in overall terms but also in terms of the frequency of usage.

These relationships, when quantified over the full list of data that the project is analysing will enable JICREG to confidently estimate the profile and duplication of unmeasured sites, based on their unique visitor count, so that they can also be included in the national database.

The minimum requirement will be that the site can provide this unique visitor count. That will be the start point for any modelling and the means by which the database can be updated over time.

The parent newspaper for the site will have JICREG readership information, either surveyed or modelled and this will be used in conjunction with the site visitor data.

From the Survey.Com data that we have available we will estimate for the different types of newspaper (daily, weekly, etc.)

- a) the proportion of site users who are duplicated
- b) the proportion who are from outside the distribution area

These together will provide an estimate of the internet usage population within the distribution area.

(At the time of writing we have only just received the first of these analyses, as described above. It is hoped that the conference presentation will be able to provide more such data.)

From the 270 readership surveys that we are analysing we can establish:

The similarity of profile, both in terms of demographic and frequency, for claimed usage of the site from the readership survey and the profile obtained from the site specific survey where we have Survey.Com data or its equivalent.

The positive correlation between these profiles will allow us to model the internet usage so as to (a) match the total usage as estimated previously, (b) its broad demographic profile and (c) its bias towards regular readers.

The JICREG database is based on postcode sectors and includes the demographics of each sector. So, once we have the estimated relationships described above we can estimate the number of internet users within each postcode sector, alongside the newspaper readership, thus allowing for schedule planning and reach & frequency analysis for any geography.

The benefit

Finally, all this is being done in order to enable regional newspapers to sell their total brand. Regional newspapers in the UK already reach some 84% of adults (average issue readership –TGI). The addition of the growing audience that the internet provides, plus its Younger, Up Market bias will enable the regional newspaper portfolio of media opportunities to grow its market share. This project, through JICREG, will provide a mechanism to help them achieve that.