

PORTFOLIO REACH - A NEW METRIC FOR PRINT AND ONLINE BRANDS

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This paper, and the research on which it is based, is a response to ever louder demands “*for a proper measurement of the true audience for newspapers, showing the size and composition of print readers AND online users.*” (Roy Greenslade, mediaguardian.co.uk, September 2006)

TNS Media has been working with Northcliffe Media (and others) to develop such measures and this paper will outline the business context that drove the need for the creation of a new metric; will explore its genesis and the methodology used to define it; will use a specific case study to demonstrate its value, and will show how it is being used to bring together and promote strong local portfolios.

Introduction

Northcliffe Media publishes 135 daily, weekly and specialist publications and has 33 associated websites (NS August 2007). This business generates £330m of local & national ad revenue annually. To support the commercial revenues of the company, Northcliffe invests considerable sums in high-quality research, the flagship project being its all-title readership study, conducted every two-three years.

For many years, the value of this study has been maximised by the introduction of strategic planning elements to the survey (analysis of communities of interest, segmentation by commitment to local media brands, geo-demographic planning data, local attachment cluster analysis and tracking of other media/platform use). These have played an important part in the development of the Northcliffe Group and one important deliverable in this process is the detailed strategic insight gained from the readership research and presented locally (35 versions!) and centrally.

For many years, this research has been conducted by TNS Media and they were commissioned in 2005 to conduct the most recent readership survey.

Objectives of the Study

Over the past ten years or so, a clear trend has been emerging in the way local communities engage with local media. One part of that trend, certainly, has been a fall in copy sales, for local daily papers in particular. But the Northcliffe readership research has provided consistent and long-term evidence that this is less a function of declining participation in local media, and more a change in the dynamics of ‘readership’. Increasing numbers of people are reading a local daily newspaper once, twice or three times a week – but doing so on a regular basis. They may be drawn by news or sport, but many are also attracted by the commercial supplements (jobs, property and entertainments guides). So they are just as valuable to advertisers as traditional ‘regular readers’.

One impact of this change is that weekly reach has become a much more important measure for local newspaper brands – and one that has proved to be more stable over successive readership waves, demolishing one of the myths surrounding local press – that it is in terminal decline.

This move towards less frequent and more focussed contact with a local newspaper has happened alongside the development of local online media. Northcliffe has been at the forefront of local website provision – with its **thisis...** brand – for more than a decade and has invested heavily in local sites that are companion platforms to local newspapers, as well as providing new routes into the portfolio for non-readers.

Historically, one barrier to further development of online local media has been the fear of cannibalisation: ‘*if I provide more regular news updates online, will the newspaper’s content become less valuable?*’; ‘*if recruitment agencies can place a job ad online, will job-seekers stop buying Wednesday’s paper?*’. This fear was perfectly natural but, as the internet is here to stay, needed to be dispelled. So the research needed to demolish another local media myth - that web spelled the end of web offset!

(Online audience measurement at the time, while giving excellent monthly user statistics could not distinguish between the geographies of the user. Therefore for a ‘local’ website it was unclear how many users were actually residing or working in the local area.)

Extending across multiple platforms gives local media brands a new business model, and new business opportunities. To take the best advantage of those opportunities, the priority for Northcliffe was to quantify the contribution of each platform and to understand the relationship between them. So the 2005/06 Northcliffe readership study was designed with this in mind.

It was also important that the results were valued and credible for the regional MDs and editors who would be working to develop these new local opportunities. In this we were able to capitalise on the time and investment that the central Northcliffe research team (and TNS) had devoted over the years to ensure local buy-in to the readership findings. Because the local teams are exposed to regular and detailed presentations of readership findings, they have come to know the central research team and the TNS team and to appreciate our knowledge of the Northcliffe business. As a result, they have become more engaged and involved with the research and TNS 'data' has become a recognised currency.

So, taking all this into account, the readership study needed to:

- Deliver a measurement of the reach of all platforms, individually and collectively – within the context of a trusted readership methodology
- Provide an understanding how the platforms work together, as well as their individual strengths and weaknesses.

In common with all large-scale readership projects, it also had to:

- Tell the story of Group, region and platform performance - in the context of previous performance, relative to other platforms within the Group, and against competitive media.
- Drive the strategic agenda going forward – for Group, regions and platforms.
- Paint a picture of each geographic area, its growth (or decline), its population and its needs.
- Develop strong and distinctive sales arguments for Northcliffe.
- Produce advertising sales data for local use.

The Portfolio Reach Measure

The research objectives for the study as a whole were, as always, to provide readership research of the highest standards within JICREG guidelines (and within a tight timescale).

The portfolio reach measure was intended to be “*a measure of the impact of all Northcliffe platforms in a local area*” and we knew that this could be expressed in a number of different ways. But our primary considerations were:

- The need to produce a measure that could be collected for all platforms in the area (daily and weekly newspapers, magazines of varying frequency and websites)
- The need for a measure that was simple to understand, collect and explain.
- The need to reduce the questionnaire burden for those who don't use the internet or don't visit local sites
- The need to maintain the central, and regulated, newspaper readership measures.
- Accurate measurement of website use by those in local area

The central newspaper readership measures involve screening for readership in the past 12 months and collecting AIR by the recency method. We also ask about frequency of readership.

Clearly Average Issue Readership is an alien concept as far as websites are concerned – there being no recognisable 'issue'. So we knew we needed to focus on frequency or recency (using the longer recency code-frame introduced by JICREG in 2003).

In fact, we covered both in the Northcliffe Readership Survey questionnaire but our portfolio reach measures are recency-based, as they provide a closer link to the AIR newspaper measures. (The initial screening is, however, more rigorous for websites than for newspapers in order to contain the questionnaire length).

So, to put it simply, we use a recency question for all Northcliffe platforms in a local area and combine responses to produce our portfolio reach measure. In the **Leicester Portfolio** section below, we show the question sequence, prompts and analysis to demonstrate how this works in practice. First, the overall methodology.

Outline Methodology

The Northcliffe 2005/6 readership project involved 24,545 interviews with a representative sample of the population in the Northcliffe publishing areas covered – equivalent to one interview for every 390 adults.

Sampling was conducted to strict JICREG guidelines with survey areas being defined using postcode sector breakdowns of household penetration for each Northcliffe title. In the case of morning titles, survey areas included all postcodes with a 5%+ household penetration. All other titles, regional evening, paid weeklies and free weekly titles included all postcodes with 10%+ household penetration. This only varied where 5% or 10% areas accounted for less than 80% of a title's total circulation, or if the area contained lakes or islands of lower or higher penetration, in which case, special JICREG rules applied.

Postcode sectors for titles were ranked in descending order for the main title in each sub-area, cumulating the population and calculating the sample interval required. Sample points were then allocated in a systematic random way and each title had the minimum required 50 sample/starting points. Sampling in each point was then by random route from a fixed starting address.

Minimum quotas were set by working status within sex for each location to increase the likelihood of the sample being representative before weighting (and thereby reducing weighting factors). Data was weighted to the population by social grade (2), gender (2) and age (7) within discrete sampling areas, thus clearly quantifying the local market.

All interviews were conducted in home, face to face, with adults 15+ who resided at that address. The questionnaire was administered by multi-media CAPI and lasted an average of 20 to 25 minutes. The questionnaire was common to all 17 of the Northcliffe regional centres covered, barring local media lists. All respondents who agreed were left with a paper self-completion questionnaire at the end of a completed CAPI interview.

In line with JICREG guidelines, over half of interviewing was conducted over evenings and weekends to ensure a representative sample of the working population. Interviewing was also evenly-spread by day of week and across weeks.

This project design and methodology has been in consistent use by TNS over multiple readership waves, providing reliable trend data and benchmarks from which to measure future development.

In total, readership was established for 790 Northcliffe and competitive print titles, and for 233 Northcliffe and competitive websites.

The Leicester Portfolio

The Leicester area is in the East Midlands. It has a population of 750,000, most of whom live in the city of Leicester. It is an area of increasing diversity, with a large City-based Asian population and a declining manufacturing base – as well as growth in the wealthy population in the surrounding villages.

Leicester City Football Club gave the world Gary Lineker and the Walkers crisps, with which he is so associated, are also made in the city. Leicester University has a worldwide reputation for studies in criminology having pioneered the use of DNA fingerprinting. Ashby Castle, Belvoir Castle, St Martin's Cathedral and Bosworth Battlefield are the City's main historical tourist attractions, but the more recent introduction of the National Space Centre also attracts visitors from far and wide.

The Northcliffe portfolio comprises:



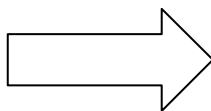
This is Leicester's flagship daily newspaper. Daily editions cover regional news, sport and features.
Circulation: 73,634 (Jul-Dec 2006)
Readership: 232,995 (Jul-Dec 2006)



This is the free weekly newspaper, published in four area editions.
Distribution: 145,665 (Jul-Dec 2006)
Readership: 216,521 (Jul-Dec 2006)



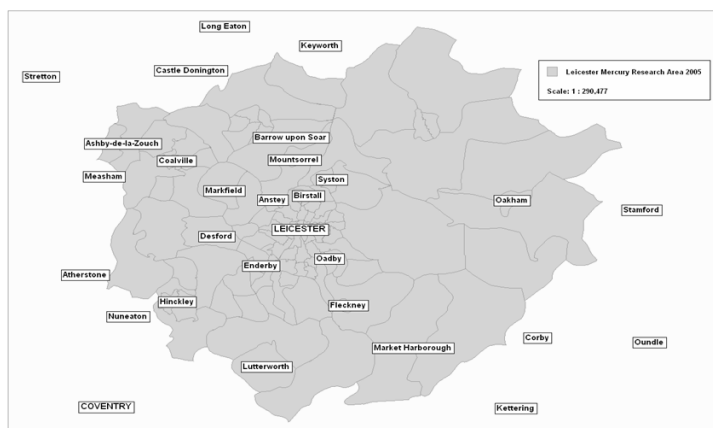
A free morning tabloid, available in major cities – including Leicester since 2004. News with a more national focus.
Distribution: 20,200 (Jul-Dec 2006)



Well-established online offering.
Monthly unique users: 171,121 (July 2007)

The Leicester phase of the research took place between September 2005 and January 2006 and involved interviews with 1,172 residents of the area. The research area (the Leicester Mercury 10% area) stretched well beyond the City into the prosperous County area.

Mercury 10% area



The questionnaire – as with all JICREG readership studies, begins with establishing readership of predominantly local titles. The Leicester survey collected readership of 15 daily papers (including 10 nationals), 13 paid-for weeklies, 16 free weeklies, 6 specialist weeklies, 1 bi-weekly paper, 7 monthly magazines, 2 bi-monthly magazines, 1 quarterly magazine and 3 bi-annual magazines.

All use grouped masthead prompts (in colour) to establish, initially, readership with the last 12 months:

1. **Looking at these different screens, please could you tell me which publications you have read or looked at for at least 2 minutes in the past 12 months. It doesn't matter whose copy it was, where you saw it or how old it was.**

DAILY PUBLICATIONS		LAST 12 MONTHS	
METRO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening Telegraph	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leicester Mercury	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This is followed by a frequency question, asked of all those who have read a title in the last 12 months, and then the recency question – using the same grouped prompts. The recency scale is not revealed to respondents.

3. **When did you last read or look at a copy? Once again, it doesn't matter whose copy it was, where you saw it, or how old it was, just as long as you can remember spending at least 2 minutes reading or looking at it. So, when did you last read or look at a copy of (EACH PAPER READ AT Q1).**

NB IF ANSWER 'TODAY', ASK: When did you last look at a copy apart from today? IF INTERVIEWING ON MONDAY, REMEMBER THAT SATURDAY AND SUNDAY SHOULD BE CODED AS YESTERDAY (THE DAILY PAPERS ARE NOT PUBLISHED ON A SUNDAY)

YESTERDAY
 LAST 7 DAYS
 LAST 4 WEEKS
 LAST 3 MONTHS
 LAST 6 MONTHS
 LAST 12 MONTHS

This question provides both AIR and weekly reach for the print titles in Leicester and – this area is a good example of the changing readership dynamic discussed earlier – AIR for the daily is down, but read in past week is actually up, compared to the 2003 survey (despite the introduction to the area of Metro).

Reach of NNG Media

	AIR		Weekly reach	
	2003	2006	2003	2006
Leicester Mercury (in Leicester Mercury 10% area)	32% 239,000	30% 228,000	61% 460,000	62% 467,000
Metro (in total area)	NA	8% 57,000	NA	19% 146,000
	AIR		Monthly reach	
	2003	2006	2003	2006
Leicester Mail Group* (in 10% area)	45% 274,000	57% 213,000	54% 323,000	65% 242,000

*Research area changed between 2003 & 2006

The Leicester survey also collected data for 17 websites. Screening in this case first asked for awareness, and then, of those aware, whether the site had been visited. The prompts used for websites were typed urls, shown to the respondent on screen.

ASK FOR ALL WEBSITES HEARD OF

- A. **And which of the following websites, if any, have you ever visited?**

ASK FOR ALL WEBSITES VISITED

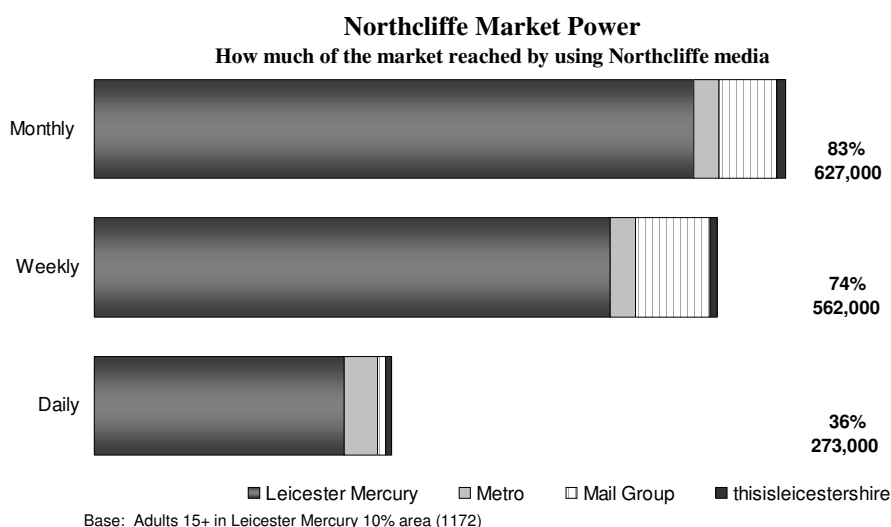
- B. **Not including today when did you last visit?**

YESTERDAY
IN LAST 7 DAYS
IN LAST 4 WEEKS
IN LAST 3 MONTHS
IN LAST 6 MONTHS
IN LAST 12 MONTHS
NEVER

Monthly reach of the local Northcliffe website (among the total population) had more than doubled since the previous survey.

	Monthly reach	
	2003	2006
thisisleicestershire (total survey area)	5% 37,000	12% 89,000

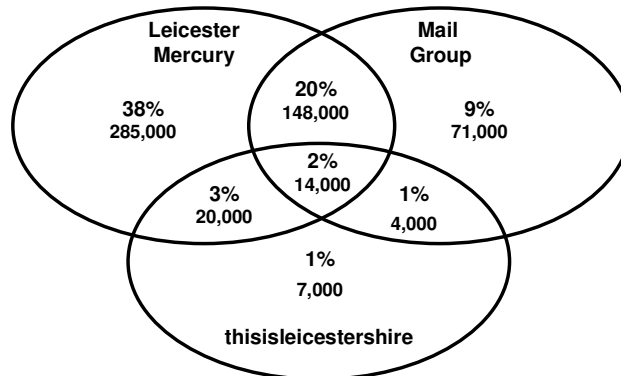
Recency results for Northcliffe print and online brands were then combined (and de-duplicated), to produce portfolio reach in the Leicester area. The chart below shows how much of the population the portfolio reaches, on a daily, weekly and monthly basis.



Here the reach is calculated sequentially – reach first of the Leicester Mercury then incremental reach added by Metro, then the Mail incremental then additional reach of the thisisleicestershire sites. Between them, these key elements of Northcliffe's Leicester portfolio reach over a third of the population a day, nearly three quarters across a week and over 80% in the course of a month.

The inter-relationship between the three key brands was also explored in the research.

Weekly use of key Northcliffe brands



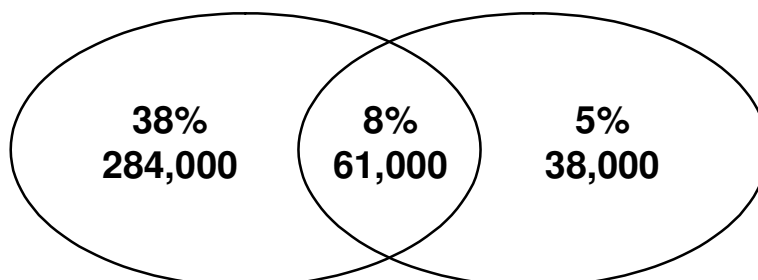
Base: Adults 15+ in Leicester Mercury 10% area (1172)

So 5% of the population (and 7% of past-week Mercury readers) used the website in the past week – a stronger relationship than exists between the Mail series and the website.

As well as quantifying the use of print and online brands, the research went some way towards reassuring publishers and advertisers that each had an important place in the lives of readers and users. This was especially true for weekly classified sections and the research was able to probe platform use for jobs, property, motors and entertainments. For jobs, there was still a clear preference for print brands – but significant use of both together.

Ever read the job section

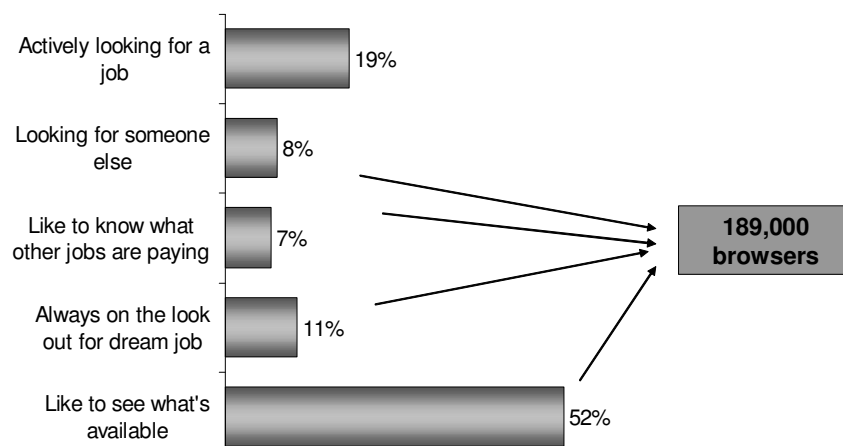
Ever accessed local job website



Base : All adults 15+ in Leicester Mercury 10% area (1172)

Job section traffic was boosted by the high level of browsers in the readership – reinforcement of the browse/search distinctions between the two platforms.

Main reasons for reading Jobs Section



Base : All read job section in last month, in Leicester Mercury 10% area (349)

The measurements and insights gained from the TNS readership research and particularly the portfolio audience measurement have been invaluable in providing management teams across Northcliffe with an understanding of how all the numerous media channels work together to deliver audience reach.

It has allowed local, regional and the Group management to see how each individual and all combinations of media build over time from read/used yesterday to the last 12 months. The data is robust enough to allow analysis by demographics and commercial audiences e.g. all who intend to buy/sell a house in the next year.

Conclusions

For the first time the local, regional and Group management teams have had a clear idea of their total audience reach and the contribution of each media channel... over time. It has also provided a tool to build cross-media sales arguments and rate cards based on audience reach.

Local management:

- Identified and quantified opportunities. e.g. in Leicester 71,000 people read the free paper each week but don't use the paid newspaper or website
- Developed strategies to grow the market from within e.g. push / pull consumers from one media brand to another e.g. the Leicester Mail free papers to the website
- Market opportunities identified by commitment to brands
 - Retain & reward loyal readers/users
 - Increase readership and web user frequency
 - Move consumers within the portfolio
 - Attract new consumers by targeted messages
 - New product development e.g. Leicestershire Advertiser (an audience-led community newspaper)
- Marketing and research led approach to audience development

Northcliffe Media Group and regional management:

- Re-assured and re-enforced strengths of local media portfolio
- Increased confidence and commitment to marketing and development of websites and newspapers
- Allowed clear strategies for paid newspapers, free newspapers and websites to be developed in unison
- Confidence to extend the local media portfolio
 - New newspapers
 - New websites
 - Acquisitions
- Provided performance benchmarks for a number of Key Performance Indicators (KPI's)