DO MEDIA AND FMCG BRANDS REALLY DIFFER?

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In this paper we are focusing on questions regarding brands in print media world within which daily newspapers are our focus. We start by some deliberation on the history of daily newspapers and the shift in their role that happened with the digital era. We continue with argumenting that a typical media i.e. newspaper brand isn't that much different from a typical FMCG brand. A case study of measuring newspaper's brand perception among four different target groups, in the same way as it would be measured for a typical FMCG brand, is presented. We are convinced that newspapers, the same as FMCG products, have different brand value amongst themselves and that this fact is nowadays more or less ignored - or not used properly to say at least - when defining CPM and buying advertising space.

From a Product to the Brand

"The first printed newspaper was published in 1605, and the form has thrived even in the face of competition from technologies such as radio, television and the Internet. Recent developments on the Internet are, however, posing major challenges to the business model of many newspapers." The quote is taken from Wikipedia under a key word "newspaper" and describes the destiny of newspapers lucidly. Although the oldest among mass media and having survived the era of radio and television more or less unchanged newspapers today however stand in front of the biggest challenge ever, the challenge after which even their existence as such is at stake. There is no lack of prophesiers every time an invention, such as Internet for example, enters the public sphere. So too there were many who predicted a soon-to-happen death of newspapers and print media as such. Somehow they manage to survive, maybe because "paperless office is as possible as paperless bathroom" as someone once said.

We can observe two phases in recent history regarding the influence of internet and digital media on the "life and death" of newspapers, followed by the phase we are now living in:

1. The days of fear and loathing. This phase is denoted by fear and confusion. Newspapers adopted the internet as a new medium by establishing their own on-line versions which at the beginning were nothing much than just an on-line version of a same content. However, they were not the only ones to take news to the World Wide Web. New competition arouse in form of news portals from many providers, TV stations, mobile operators or any other company that found news portal as a great way to attract consumers to their web site(s). In this phase it seemed that the history of newspapers is really over.

2. The days of adoption. After the first fear of new competition was managed, the newspaper started to use the new media as an advantage. Sending flash news over the mobile phones, building on-line versions which are not just a copy of print version, using the media to generate content by their users, using blogs and forums to add value to the content depict this phase, which could be easily described also as a shift from one-to-many communication into many-to-many, two-side communication. The change is structural. As Bertrand Pecquerie and John Burke describe in the no. 1 trend for the newspapers in 2006, the print and on-line integration is becoming a norm that is going to change the form of journalism: "Ultimately, merging the print and online newsrooms will result in new and more creative forms of journalism."[1]

3. The days of the rise of media brands. The emergence of media brand is not something really new. For instance, Clyde Bentley claims that "Brand equity, if not invented by the print media, was at least first coddled, fed and reared by it."[2] For the reasons beyond my knowledge, the print media never put the brand in front of their product – or at least not often – despite the fact that publications have an advantageous position in the brand world since they already have an important bond with the reader.[3] Times are changing however and the brand is getting in front of the product. In accordance to this another shift is happening, as described by the 8th trend of Pecquerie and Burke: "News organizations are becoming entertainment organizations".[4]

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[1] http://www.editorsweblog.org/analysis/2005/12/eight_2005_newspaper_trends_that_will_co.php
[2] Bentley, C. (1998, September/October). Building Media Brands. The Advertiser, 70(76).
[3] Ibid.
[4] http://www.editorsweblog.org/analysis/2005/12/eight_2005_newspaper_trends_that_will_co.php

There is no doubt that a newspaper's brand today is more important than the product itself. As executive director of INMA Earl J. Wilkinson put it, "in a fragmented market, the brand is everything".[5] Of course, there is no brand without a product. However, what drives the success of newspapers today is the brand. The prophesiers were wrong – internet didn't kill the print, it helped to re-invent it instead.

Analysing Daily Newspaper as a Brand

Now that we know that brand is everything, the following question seems intriguing enough to contemplate on it: Is there a difference between a typical FMCG brand, for example a yoghurt, and a typical print media brand, for example a daily newspaper? Theoretically speaking, there is no difference between brands of any kind. Therefore, we could say that there is no difference between Yoghurt A and Daily Newspaper B as long as we remain on a brand level. They might have different personalities but as seen from a research done by Nele Geeroms et al., a consistent, replicable structure exists that underlies the concept of preferred brand personality, what was revealed in a study across 11 different language markets of all continents and four categories.[6] This means that a Yoghurt brand A might be closer related to a Daily Newspaper brand B than to a Yoghurt Brand B. It is obvious that there is no need to look for specific research approach for print media brands.

In the context of the 8th trend for newspapers Pecquerie and Burke suggested that if the main asset of a news company is its content, it will maintain high quality information, but if the main asset is the brand, than new developments as a culture service provider or an entertainment service provider are to be considered.[7] We should therefore be aware of our product's brand strength. Or, to put in a "Who am I" perspective, we should be aware of what our brand is. Our brand is not what we think it is. It is what our consumers – which are not necessarilly only our readers – think we are. Lavine and Calder of Readership Institute suggest the following approach: "You know what your brand is by discussing it with readers. Your brand is whatever your customers think you are. The composite of their experiences with you, their perception of you, their feelings toward you, and what they think about you — that is your brand. The more passionate your customers are about your newspaper, the stronger your brand is. Understanding what your brand is and what it should be requires some specific marketing research. You begin by discussing it with consumers qualitatively and then doing research to measure the brand on a number of key perceptions you identified as being important to consumers. In general you want to look at results to see if your strongest perceptions are the ones you have intended to base your brand upon." [8] Needless to say, the process is the same as with any other brand…

The Case of Daily Newspaper X

This is exactly what we did in the case of Croatian daily newspaper which we will call Newspaper X. Croatia is one of the emerging markets conceived after the decay of former Yugoslavia. The print market developed quickly after 1990 – despite or maybe because of - a strong governmental pressure on media within the first ten years of democracy. Many new titles arouse in this period and survived. From an aspect of consumer behaviour Croatia is a typical mediteranian market. There is less then 10% of subscribers within total sold circulation of daily newspapers therefore the impact of loyalty and the strength of brand is very important.

In 2007 a marketing research was done for newspaper X that followed strictly the distinction between the product and the brand. Within this research one phase was devoted to brand perception. First, the brand perception was discussed in focus groups with the creators of the newspaper (internal workshops) and with various groups of readers. The prism of brand identity was defined and described by various attributes. Some of them were designated as relevant and due for quantification. The quantitative phase consisted of four surveys among four different groups representing four relevant segments while analysing the brand perception:
- internal group of newspaper's creators
- subscribers
- readers of print version
- users of on-line version

Two additional groups were taken out of this sample:
- exclusive readers of print version (not using the on-line version)
- exclusive on-line users (not reading the print version).

Unfortunately the sample size for last two groups is relatively small making the confidence intervals broader therefore we are using the results for these groups only out of pure couriosity, not taking the results too seriously. The internal group has a small sample size too but in this case we are dealing with finite population.

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[5] Wilkinson, E.J. (1999, May). Branding and the Newspaper Consumer. INMA conference, Peking 1999.
[6] Geeroms, N. Et al. (2005, November). A Taxonomy of Consumer Motives through Preferred Brand Personality: Empirical Findings for 11 Countries. Working paper, Universiteit Gent, Belgium.
[7] http://www.editorsweblog.org/analysis/2005/12/eight_2005_newspaper_trends_that_will_co.php
[8] http://www.readership.org/brand/calder-lavine_Q&A.htm

The hypothesis was that if we want to declare this particular brand as strong enough to develop the variety of products under the same brand, the perception of the brand should (1) correspond to internal perceptions and (2) shouldn't vary substantially among the relevant segments. If it does, valuable information is gained on where to focus in the future development of the products under the same brand.

The attributes were evaluated on a 1-5 scale (1 meaning "It doesn't stand for the brand at all", 5 "It does stand for the brand completely"). Four surveys were carried out, with CATI method for readers and subscribers and WEB survey with internal group and the users of on-line version. Because of the two different data collection techniques, mode effect was also controlled since we have surveyed the readers of print version and the users of on-line version both in CATI and in WEB survey. Comparing the average score between these groups reveals that the average score in WEB survey is 0.2 higher than in CATI survey. This is why we have used intra-group standardized values for detecting the attributes where the difference between groups is something more than just a consequence of mode effect or/and generally higher (lower) scores for any other reason. At the same time this approach reveals which attributes were valued above and below the average within the group.

Table 1 – Original and Standardized scores

Original Scores	print readers (CATI)	on-line users (WEB)	subscribers (CATI)	Internal (WEB)	Exclusive print readers (CATI)	Exclusive on-line users (WEB)
Applicable	3,8	3,9	4,1	3,7	3,8	3,7
Useful	3,8	3,9	4,2	3,7	3,8	3,6
Trustworthy	3,6	3,6	3,8	3,5	3,5	3,1
Contemporary	3,8	3,9	4,2	3,9	3,7	3,4
Critical	3,5	3,6	3,8	3,6	3,4	3,7
Worth its price	3,8	3,7	4,3	4,0	3,8	3,1
Better than competition	3,6	3,9	4,2	4,2	3,8	3,0
Young	3,4	3,5	3,9	3,7	3,2	3,1
Trendy	3,8	3,9	4,2	3,8	3,6	3,3
Urban	3,7	3,8	4,1	4,2	3,6	3,3
Something special	3,2	3,4	3,7	3,7	3,0	2,6
Entertaining	3,3	3,8	3,9	4,0	3,2	3,4
Friendly	3,6	3,5	4,1	3,4	3,6	2,5
Dynamic	3,7	3,7	4,0	4,0	3,5	3,0
Honest	3,4	3,4	3,9	3,4	3,5	2,6
Objective	3,6	3,5	3,8	3,6	3,7	2,8
Liberal	3,7	3,7	4,1	4,0	3,6	2,6
Stands for what it says	3,5	3,4	3,9	3,7	3,6	3,1
Positive	3,7	3,7	4,1	3,7	3,6	2,9
Optimistic	3,4	3,5	3,7	3,3	3,2	2,6
Respectable	3,9	3,8	4,1	3,6	4,0	3,1
Mean	3,6	3,7	4,0	3,7	3,6	3,1
Standard Deviation	0,2	0,2	0,2	0,2	0,2	0,4
Standardized Values	print readers (CATI)	on-line users (WEB)	subscribers (CATI)	Internal (WEB)	Exclusive print readers (CATI)	Exclusive on-line users (WEB)
Applicable	1,2	1,4	0,7	-0,1	1,1	1,7
Useful	1,1	1,3	1,1	-0,1	0,9	1,5
Trustworthy	-0,2	-0,6	-0,8	-1,1	-0,2	0,1
Contemporary	0,8	1,4	1,2	0,5	0,6	0,8
Critical	-0,5	-0,6	-1,2	-0,6	-0,7	1,7
Worth its price	1,2	-0,1	1,5	0,9	0,8	0,1
Better than competition	0,1	1,0	0,9	1,7	0,8	-0,2
Young	-0,9	-0,8	-0,7	-0,3	-1,6	0,1
Trendy	0,8	1,3	1,2	0,4	0,3	0,7
Urban	0,4	0,6	0,7	1,7	0,3	0,5
Something special	-2,3	-1,2	-1,6	-0,3	-2,2	-1,2
Entertaining	-1,7	0,5	-0,5	1,0	-1,5	0,8
Friendly	0,1	-0,8	0,4	-1,2	0,1	-1,6
Dynamic	0,2	0,3	0,1	1,2	-0,1	-0,2
Honest	-0,9	-1,6	-0,7	-1,4	-0,1	-1,2
Objective	0,0	-1,1	-1,2	-0,6	0,6	-0,8
Liberal	0,3	0,3	0,3	1,2	0,3	-1,2
Stands for what it says	-0,4	-1,3	-0,7	-0,3	0,3	0,1
Positive	0,6	0,2	0,3	-0,3	0,0	-0,6
Optimistic	-1,2	-1,0	-1,7	-1,9	-1,6	-1,2
Respectable	1,4	0,9	0,7	-0,4	1,8	0,1
sample size	**186**	**103**	**201**	**25**	**36**	**20**

Bivariate correlation analysis was used to test the hypothesis. We are seeking the same pattern between groups. If the perceptions as a whole are similar, no matter the differences in mean scores, the pattern should be the same or at least similar. For example, eventhough the scores would differ by attributes substantially, if they all go in the same direction then the pattern is the same. If there would be the same difference, for example + 0.2 on every attribute, than the correlation would equal 1 and we could claim that the perception pattern is the same. The Pearson coeficient was used on standardized scores.

Table 2 – The correlations

Group / Interview method	print readers (CATI)	on-line users (WEB)	subscribers (CATI)	Internal (WEB)
print readers (CATI)	1,00	0,68*	0,83*	0,26
on-line users (WEB)	0,68*	1,00	0,80*	0,61*
subscribers (CATI)	0,83*	0,80*	1,00	0,57*
Internal (WEB)	0,26	0,61*	0,57*	1,00

The conclusion of this measurement was as follows. In general, the perception of the brand is the highest (average score for attributes is 4.0) among the subscribers which seems expected while all four groups have an average above 3.5 which considered as favorable result. Only one correlation is not significant therefore indicating different perception pattern. It is the one between internal group and print readers. All in all the perception pattern of internal group is the most unique among these four groups which is again expected in a way however if it is too different this might become a problem. A detailed look at the scores for attributes reveals which of them are the ones where perception differs the most. We have used a simple method of searching for the maximum absolute difference between minimal and maximal score for the (standardized) values. The most critical among all attributes seems to be "entertaining" followed by "something special" and "respectable". To conclude, we might say that perception pattern among three groups of readers and users correlates in a satisfactory way but not if internal group is considered. The creators should ask themselves an intriguing question – why is the perception so different? Is that strength or a weakness? Can we live with it or should we do something about it? In addition, we have also identified three attributes which should be examed more in details before further development of the brand.

So is there a difference between a typical FMCG brand and a newspaper brand?

A particular experience of one of the authors of this paper reveals her experience in FMCG and print media brand analysis. As she gained most of her working experience (after working at a research agency) as a market researcher for leading FMCG Company in Croatia, she faced completely different approach to research when joining a leading publishing company.

In FMCG it's all about the Brand. Brand architecture, Brand equity or Brand strength is integrated in Business plans. Brand strategy is core issue in marketing plans. Everything within the company goes around this Brand. Research is wrapped around the Brand and always a starting point for yearly sales plan or – to put it in a brand language - Brand product portfolio plan. The Brand gets the budget, not the products. The more successful a Brand /Brand manager is the more the money for marketing mix he/she gains. Surprisingly enough, the most successful brand is the one with the best consumer insight.

Can it be translated into a newspaper language? Brand equity that we measure in FMCG through tools like Millward Brown Brand Dynamics, or PGM (Product Group Manager)[9] works really well. Bonding with a Brand is the key. We need to measure Bonding either through Presence, Relevance, Performance, Advantage, and or translated in PGM Recognition, Experience, Consideration, Usage and Primary Usage. The price we pay for a bottle of Coca –Cola or a pair of Nike or Nokia phone - are we paying for a product or for Brand? Does Coca-Cola really taste better than other colas, is Nike really better than other sportswear? Of course it is. Consumers are happy of to be able to pay for it. Just because they are achieving their personal goals and motives that only a brand can give them.

Does it work for a newspaper as well? After spending some time in the publishing house which happens to be the market leader in the Croatian market I am most certainly convinced so. Brand equity measures could point to differences among the newspapers with nearly the same readership. They may be crucial from a preferred brand personality point-of-view. This could be a breaking point in convincing the clients to spent more money on advertising with the newspaper that has stronger brand or even more importantly, that has a brand personality that correlates to advertiser's brand personality the most. Wouldn't you prefer to advertise in a newspaper whose brand carries the same values as your product's brand?

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[9] PGM is a strategic marketing tool measuring brand strength for more than 2500 FMCG brands in the territory of former Yugoslavia since 2003. PGM is conducted by VALICON.

Implications for Readership Research

As the media planning guru Erwin Ephron said a long time ago: "Three things affect how well an ad works: The kind of person reached (target); the ad's content and execution (message), and the context in which the message is received (environment)."[10] These three things – well they are two actually, the reach and the environment - correlate to two phases we can observe in readership research development:

- The AIR period, denoted by measuring methodology issues, analyzing the corse of Recent Reading, average vs. specific copy readership discussions and section readership model development. It was a period of Replicated readership blues.
- The engagement period followed, within which the advantages of the environment were sought, displaying the evidence of advertising effectiveness within the editorial context or/and in combination with other media, claiming the reader's involvement, attentiveness and receptivity in this environment as a key differential moment.

Using only the readership figures even if enriched by engagement efforts today is the same as if FMCG brand managers would be using only market share and consumer behaviour data to analyse and develop their brand. Not good enough, I am afraid. To continue with Erwin: "There is confusion between the magazine as a product that consumers buy, read and relate to, and the magazine as a medium that advertisers hire to carry messages to consumer markets. These are very different functions and confusing them hurts print advertising."[11] He couldn't have said it more precisely. The readership and the "environmental issues" are addressing only the first, magazine (or newspaper) being a product. Now, magazine as a channel which advertisers – being brand owners and/or managers – hire to carry the message to consumer markets, should be addressed by the same approach that advertised brands use – analysing the brand personality and brand equity studies. Namely, another shift happened meanwhile in modern marketing, a shift "from targeting messages at passive audiences to ideas being adopted by (or co-created with) groups for whom they are relevant."[12] Within this context using reach and socio-demographic figures simply isn't enough any more. Such figures are passive ones but audiences aren't passive any more. Proving how print advertising works is welcomed but not satisfactory. It remains on the level of newspaper as a product, neglecting its power as being a (potentially strong) brand. New approach is needed, using the argument of the power of the brand. For example - as only one of possible approaches - in the case of the newspaper X one should focus on all the advertisers/brands that have similar brand identity as perceived by their (potential) users since they will fit well in the brand environment that this newspaper offers (using of course only those attributes which are relevant for the advertised brand). In addition, a special weight on whether to use more print or more on-line within this newspaper could be applied according to the differences between the off- and on-line readers/users perceptions.

Conclusion

Two imperatives seem obvious when thinking of the role of branding in print media:

1. Newspapers should invest in brand equity and the development of the brand strength, in order to build loyalty of the readers and by that preserving the reach, which is still the primary condition of their existe   nce.
2. Newspapers should study brand equity and brand personality of their brand(s) and use such knowledge to build the image of the brand's strength and impact among advertisers on one hand, while implementing the brand personality in media planning by trying to find out the best matches among the advertised brands, in order to preserve or even to rise the advertiser's interest in newspaper advertising, on the other. Furthermore, this should not be used only as an argument but rather as a mean to seek new opportunities.

We believe that this approach could and should be explored in the future. A taxonomy of preferred brand personalities suggested by Geeroms et al. seems more than appropriate for that purpose.

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[10] Ephron, E. (1994, January). The Longer The List, The Better The Plan. http://www.ephrononmedia.com
[11] Ephron, E. (2003, June). The Puzzling Passivity of Print. http://www.ephrononmedia.com
[12] Grant, J. (2006). The Brand Innovation Manifesto. John Wiley & Sons Ltd. (p. 54)