

# SIMPLE APPROACH TOWARDS MEDIA BRAND MEASUREMENT

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## Summary

Regardless of the research approach, the readership measurements on multiplied platforms are designed to obtain the total reach of so-called Media Brands (defined as the logical sum of reach both: print and digital versions) and to estimate the relative contribution of each platform.

Several research approaches to the measurement of Media Brands might be applied. There are methods based on readers declarations (which significantly increases the interview duration and can cause primacy or recency effects) or by fusion of the results from different sources: the readership data and data coming from passive Internet measurement. This latter approach is analytically complex and has all the advantages and - widely discussed - limitations of the data fusion.

We are therefore in a situation of methodological dilemmas and ... - on many markets - in the absence of the desired information. But in fact, answers on the questions on Media Brands reach are relatively easily accessible for the most of publishers. The aim of this paper is to present the study conducted in Poland for the publisher who was vividly interested in getting a quick information on the total reach of the Media Brand.

Obviously I do not try to convince the audience that we have found the holy grail. The assumption described below is relatively simple and has certain limitations. But it has been tested in several measurements and provides interesting insight into the phenomenon of relation between print and the Internet. The findings, however, are not the most optimistic...

## 1. Overview of Methodology

The research methodology was developed to exploit in the best possible way the synergy of the data coming from the standard Internet Audience Measurement which are present on the market and the readership currency i.e. actual readership survey NRS. The research solution is based on an analytical estimate of the total reach of both: print media and the relevant internet sites belonging to the given publisher which represent the same Media Brand as the print version of the newspaper or magazine. The advantage of this approach is the fact that the study is an ad hoc project which requires no changes to the standard readership survey.

The study design involves placing the link to the readership questionnaire (conducted by CAWI method) on these internet sites which are considered as the components of the Media Brand. The questions for respondents concern the readership of the printed edition of the surveyed title. The questions are asked in the standard sequence: filter question, recency and frequency questions + question on readership in the days of the week (in the case of dailies). The questions in the survey are very similar to those asked in the standard readership research NRS. They are accompanied by a brief metrics questions, which are as close as possible to the demographics from both standards: readership survey and internet audience measurement.

The described study is conducted as an ad hoc project and it is commissioned by the publisher approximately every six months. The survey allows the publisher to monitor the total reach of the media channels of which their portfolio consists and provides interesting insights into the phenomenon of reading the content on both platforms: printed and on-line.

## 2. Scope of the research

Although the objective of the study is to provide total reach of so called Media Brand, not all forms in which the content may be available for the readers were taken into account. In general, we can distinguish the following forms of the press:

1. Print issues
2. Digital editions
  - a. as pdf files (or other format)
  - b. in the application form (available on the smartphone, tablet, PC)
  - c. in the form of internet site (accessible via smartphone, tablet or PC)

According to the data from readership survey<sup>1</sup>, the popularity of digital editions in the first two forms, namely in the form of PDF and applications, still does not reach a high level.

**Table 1. Reach of the digital forms of press**

	V 2013	VI 2013
(a) PDF files	2,1%	2,3%
(b) Applications (2)	1,0%	1,3%
Total (a) or (b)	2,5%	2,6%
(c) Internet sites of press titles	16%	17,3%

Source: Polish NRS, V-VI 2013

Apart from the printed editions of press titles the largest contribution to the creation of the Media Brand have the Internet services (web sites of that titles). The relationship between printed issues and websites published under the same brand name, was exactly the main subject of interest in our study.

It should be noted that the readership of newspapers' websites can be particularly difficult to estimate basing on declarative questions. While the digital versions of the press in the form of applications, or even PDF files are relatively easy to describe in the questionnaire, asking about the specific Internet sites (and its sub-sites) might be a source of respondents' misunderstanding.

### 3. Analytical assumption

It is assumed that the people who gave positive answer about the readership of the printed version while filling in the on-line questionnaire actually are the readers of both editions: digital and printed. Therefore the method allows to obtain the percentage of on-line readers who read also the printed edition. For the further analysis, the following measures are used:

1. proportion of users of the title's web site who read a printed issue as well (a)
2. the estimated number of users of the title's web site (obtained from an independent source, the Internet Audience Measurement standard, (in Poland it is MegaPanel GEMIUS) (I)
3. the estimated number of readers of the printed edition of the title (obtained from standard press readership survey NRS) (P)

The value (a) and the estimated number of title's web site users (I) allow together to obtain the number of concurrent users of both platforms: print and digital (duplication). This value (D) is included in the further analysis.

$$D = a \times I$$

It is also possible to establish the proportion (b): percentage of readers of traditional version who read also the digital editions of the given title. In other words this is the scale of on-line readership among readers of printed version of the newspaper.

$$b = \frac{D}{P}$$

This value, however, is not directly used in the further calculations but can act as verification of the data reliability<sup>2</sup>.

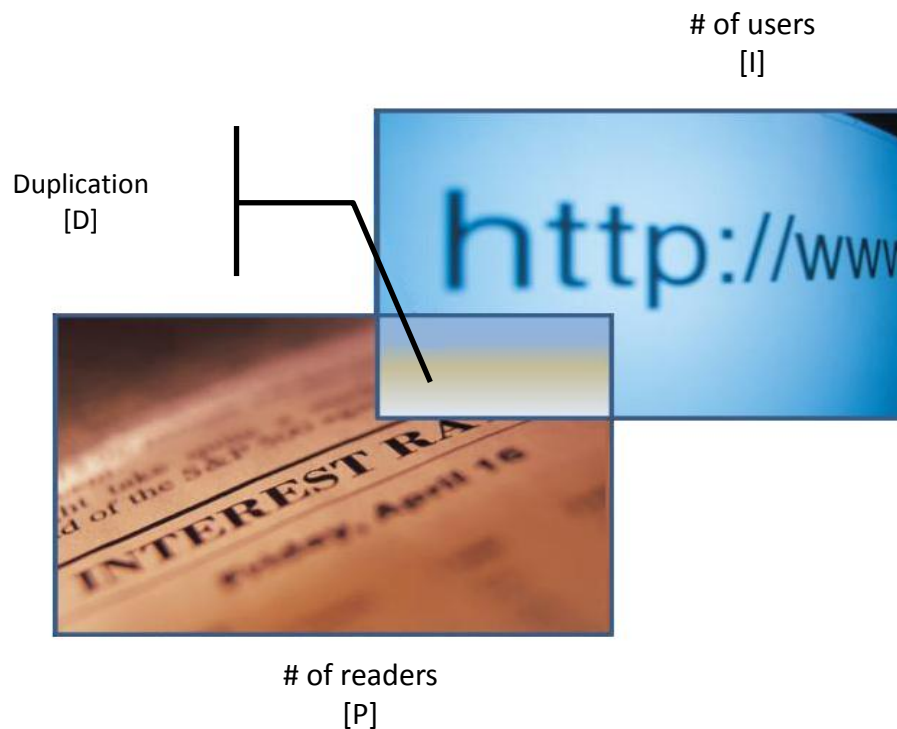
As a result of the simple transformations presented above there are finally obtained:

1. Readership duplication of on-line version and print version of a given title (D)
2. Total Reach of Media Brand:

$$T = I + P - D$$

<sup>1</sup> A general question about the readership of newspapers or magazines in digital form is asked in the standard readership survey (NRS), but there is gathered no information on the individual titles.

<sup>2</sup> It turns out that  $b=22,7\%$  whilst from NRS data the percentage of newspaper's readers who read any internet site of press titles (regardless which one) is  $36,1\%$ . It looks as the reliable result as the readers can also read the sites of other titles, not only the ones making up the analyzed Media Brand.

**Picture 1. Duplication of print and Internet issues of press and the total reach of both forms**

The above metrics are available in terms of weekly reach and can be also obtained in predefined basic socio-demographic groups. The definitions of the groups include categories of popular target groups used by media agencies for planning advertising campaigns.

For the daily press it is very important to gather information on the readership of issues from particular days of the week. In order to estimate the total reach of Media Brand and the duplication in the days of the week, the functionality of tracking the historical activity of the user, who filled in the questionnaire is applied. The identifiers of computers from which the questionnaires were filled out are combined with the information about traffic on particular website and this way it is possible to determine what day of the week this computer was used to visit the surveyed title's web site.

Analysis scheme is, in general, similar to the estimating the weekly reach. Amongst all people filling the questionnaire on the web site there is selected a subsample of respondents, who are known to have visited this site in a specific day of the week. Their responses to the question about reading the print edition of the newspaper from the same day of the week can produce the value  $a_d$ , where  $d \in [1,6]$  and represents subsequent days of the week from Monday to Saturday.

In the next steps of calculations the information on the number of users of the title's web site in a specific day of the week is needed, i.e.  $I_d$ ,  $d \in [1,6]$ . If this data is not directly available from the standard Internet Audience Measurement (this is the case in Poland), the information on the history of visits is re-applied in order to estimate the value of  $I_d$ . This data allows the calculation of the contribution of each day of the week ( $x_d$ ) in the site's total weekly reach. In conjunction with the data on the size of the weekly audience one can get the size of the audience for a particular day of the week.

$$I_d = x_d \times I, d \in [1,6]$$

Further calculations are fully analogous to those described above, and duplication of on-line and printed edition of a title for specific day of the week is:

$$D_d = a_d \times I_d$$

and Total Reach of Media Brand in a given day of the week is:

$$T_d = I_d + P_d - D_d$$

The value of  $P_d$ , i.e. the number of readers of the traditional, printed edition of a daily from a given day of the week comes directly from the standard readership survey NRS.

The survey results are subject to weighting, in order to ensure that the composition of the sample i.e. respondents who completed the survey on-line, is convergent with the structure of the audience of the relevant web site. At this point, the data coming from the standard Internet Audience Measurement is used. Weighting criteria consist of the basic demographic variables: gender, age, size of place of residence.

In addition to the analysis described above, the study provides the possibility to estimate the total reach of Media Brand even if the publisher decides that the certain Media Brand is represented by more than one website (eg. main website of the title as

well as its sub-sites eg. business, regional etc.). In this case, the link to the questionnaire about the readership of the print issue of the title is placed on all sites that represent the brand. The criterion of the relative proportion of the particular sites' audience is taken into consideration at the stage of weighing. The demographic criteria also reflect the structure of the total audience (logical sum of all sites).

#### 4. Results

The presented results come from a survey conducted for the publisher of one of the Polish dailies. The Media Brand of this publisher consist of the printed edition and several websites: general theme, business, local news, feminine. The comparison of the contribution that different services have in building the total reach of Media Brand is presented below.

**Table 2. Contribution of particular websites in the total reach of Media Brand**

	Duplication	Internet only	Print only	Internet only / print
general theme	7%	11%	82%	10%
business	7%	9%	84%	13%
local news	13%	17%	70%	21%
feminine	1%	2%	97%	2%
services total	17%	25%	58%	34%

Source: MegaPanel, Polish NRS VI 2012, study 2012

It should be noted that the printed edition still account for a dominant part of the total reach of Media Brand. In the case of all web sites (taken together) that make up the Media Brand, their contribution to the weekly reach is 42% whilst nearly 60% are still exclusively belonging to the printed edition.

If the particular websites are treated separately, their contribution to the total reach is visibly lower. Sites with the local news are of the significant importance - 17% of total weekly reach of Media Brand is generated solely by the local digital edition and a further 13% is due to the duplication of online and print editions.

In order to illustrate the importance of online editions of the title in the total reach of Media Brand, there can be observed the percentage of reach increase which is obtained due to exclusive readers of title's website. The percentage is calculated as the comparison with the reach generated by the print alone. And it turns out that, thanks to the users of all websites of the title (who did not read the paper edition) the total reach of Media Brand grows by about 1/3 as compared to the reach generated by the printed edition.

Obviously, there is a clear difference for different demographic groups. They will be presented with data on total reach of Media Brand generated by the printed edition of the newspaper and all its web sites.

**Table 3. The components of the total reach of the Media Brand in different demographic groups**

	Duplication	Internet only	Print only	Internet only / print
Total	17%	25%	58%	34%
Gender				
Women	14%	27%	59%	36%
Men	19%	24%	57%	32%
Age				
15-24	16%	39%	45%	65%
25-34	19%	32%	49%	47%
35-54	17%	20%	63%	25%
55+	15%	13%	73%	15%
Size of place of residence				
Rural area	14%	24%	61%	32%
<50k	11%	28%	61%	39%
50-200k	22%	22%	56%	29%
200-500k	15%	26%	59%	35%
500k+	22%	25%	53%	34%
Education				
Below secondary	9%	25%	66%	33%
Secondary	13%	26%	61%	35%
Above secondary	20%	26%	54%	35%

Source: MegaPanel, Polish NRS VI 2012, study 2012

The respondents' age is the essential demographic feature influencing the importance of the Internet in generating the total reach of Media Brand. For the youngest readers the share of print editions in the total reach is smaller than that of the Internet. Along with the age of respondents, this trend is changing and for people aged 55 + printed press is crucial. Interestingly, the importance of the particular forms of press very little depends on the size of place of residence, and almost does not depend on respondents' education.

More interesting relations can be observed among people of different socio – professional status.

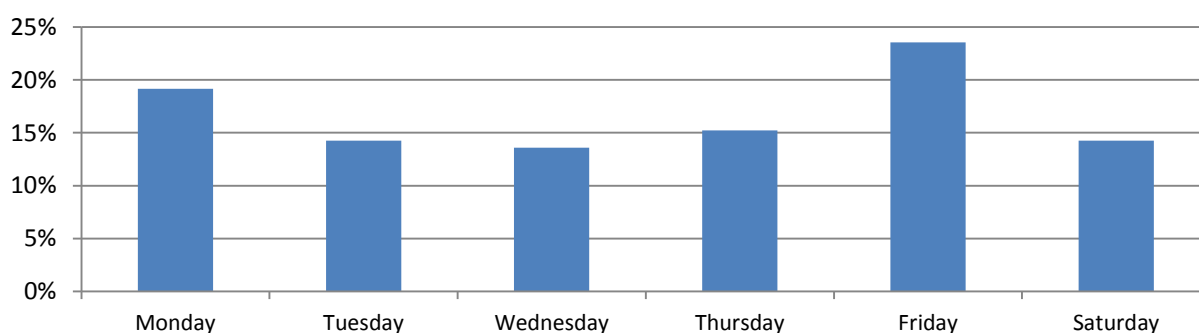
**Table 4. The components of the total reach of the Media Brand in groups of different socio – professional status**

	Duplication	Internet only	Print only	Internet only / print
Pupils and full-time students	15%	44%	41%	79%
People of working age, employed	15%	20%	65%	25%
People of working age, unemployed	15%	38%	48%	60%
People of retirement age, pensioners	12%	12%	76%	13%
Blue collars	13%	19%	68%	24%
Professionals	20%	24%	56%	32%

Source: MegaPanel, Polish NRS VI 2012, study 2012

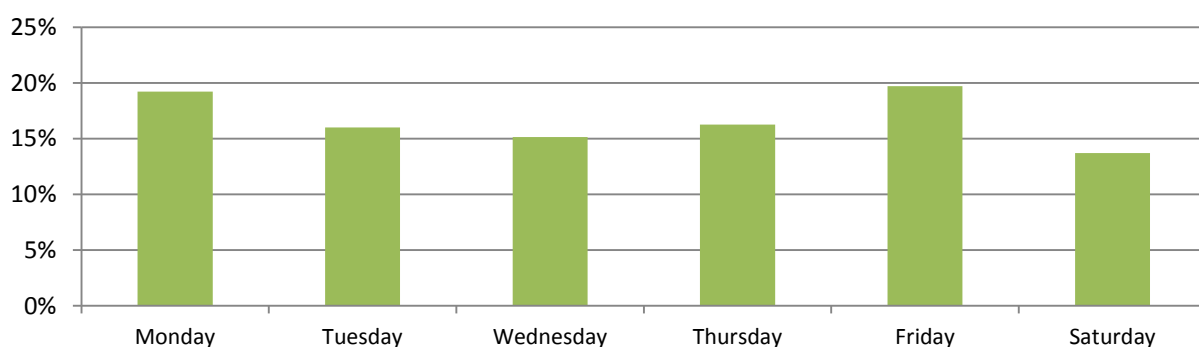
Aside from the already mentioned obvious correlation with age, it is worth noting the dominant role of the Internet editions among students and people of working age who are currently unemployed. For the latter group the title's website can be a good source of job advertisements. It is also worth paying attention to the relatively high role of print media in the total reach of Media Brand in occupational category of professionals. Probably daily contact with the traditional newspaper still fits into the typical work schedule of these people.

As mentioned, in the case of dailies it is especially important to obtain the information on the contribution of particular forms of press in the total reach of Media Brand, analyzed in the days of the week.

**Chart 1. Proportion of the readership of printed edition in the days of the week**

Source: Polish NRS VI 2012

The circulation of printed editions of newspapers is different on different days of the week and for many years it is the highest on Fridays and Mondays. Friday's edition consist of many extras, including a TV guide and cultural supplement. Monday's edition has a sport section and an extensive supplement with job advertisements. The total reach of Media Brand generated by the printed version together with the title's websites in the subsequent days of the week is more balanced, but dominant share of Friday and Monday's editions can be also observed. Their advantage over the issues from other days of the week is, however, lower than when analyzing the reach generated solely by the printed editions.

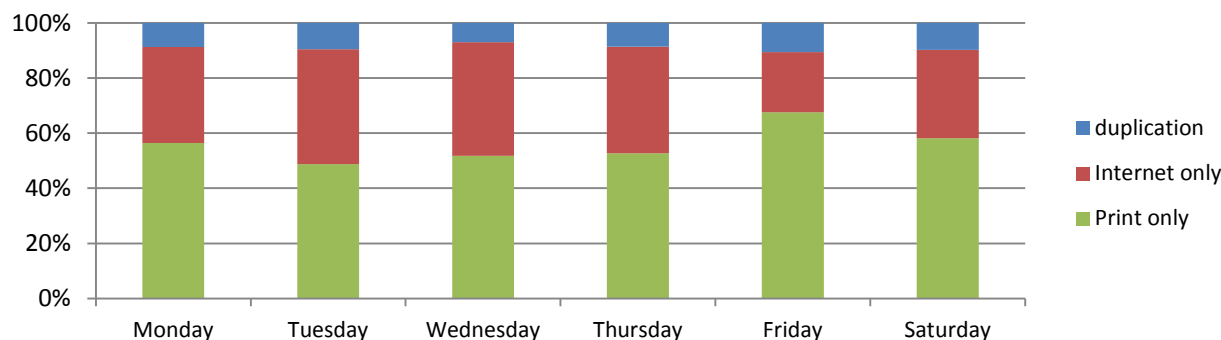
**Chart 2. Proportion of the total reach of Media Brand in the days of the week**

Source: MegaPanel, Polish NRS VI 2012, study 2012

The contribution of the title's websites in the total reach varies on each day of the week. While readership duplication of print and online editions remains every day at the same level, it can be noted that users of online publications make a greater

contribution to the total reach of Media Brand in the days from Tuesday to Thursday. These are the days of the week, when readership of the printed editions is at a lower level. So it could be said that the online editions helped to some extent to alleviate the uneven readership of newspapers published in traditional form.

**Chart 3. The components of the total reach of Media Brand in subsequent days of the week**



Source: MegaPanel, Polish NRS VI 2012, study 2012

However, looking at the results from another angle, one can hypothesize that the title's websites will deepen sales declines of printed editions which are available in the middle of the week and therefore the inequalities in the readership level (and circulation) of particular issues of newspapers will even intensify.

The effect of online publications on the total reach of Media Brand, can be assessed by analyzing its sole reach compared to the reach generated by the printed edition. Thanks to visitors of the title's website on particular days of the week, the reach of Media Brand increased by 28% on Friday, and by more than 60% on the days from Tuesday to Thursday as compared to the reach generated by the printed edition. (By the way, the observation may be made that the websites' readership enjoy greater loyalty than the readership of printed publications.)

**Table 5. The percentage of reach growth due to the title's websites in the days of the week**

	Internet only / print
Monday	53%
Tuesday	71%
Wednesday	70%
Thursday	63%
Friday	28%
Saturday	47%

Source: MegaPanel, Polish NRS VI 2012, study 2012

Analyzing the results of the subsequent waves of the survey, the trend of the growing importance of web services in generating the total reach of Media Brand can be observed. According to the widely discussed tendencies and commonly known decline in the press circulation, the increasing role of online publications, however, is less visible than one could guess due to pure intuition.

Taking into account all the websites of which the tested Media Brand consists, in July 2012 they allowed to increase the total reach by 34% as compared to the reach based on the printed edition of the newspaper. This value is higher by 9 percentage points when compared to the results of the first wave of the study, conducted in June 2011. If particular sites are treated separately then the changes are less dynamic.

**Table 6. The percentage of reach growth due to the website edition in the subsequent waves of the study**

	Internet only / print			
	services total	general theme	business	local news
June 2011	25%	9%	7%	16%
November 2011	29%	12%	7%	19%
July 2012	34%	13%	10%	21%

Source: MegaPanel, Polish NRS VI 2012, study 2012

The important question that arises, concerns the absolute change in the total reach of Media Brand over the period. And here, unfortunately, the answer is not optimistic, as the total weekly reach of the surveyed Media Brand turns out to become lower. The main responsibility for this situation, of course, lays on the side of traditional newspaper because the title's websites enjoy the increase of readership and loyalty. The pace of this process does not however allow to reverse the general trend.

**Table 7. The dynamics of the total reach of Media Brand and its components**

	Index on the previous wave			
	Total reach	Duplication	Internet only	Print only
June 2011	100	100	100	100
November 2011	94	93	104	91
July 2012	91	93	103	87

Source: MegaPanel, Polish NRS VI 2012, study 2012

## 5. Conclusions

It is easier and more effective to generate the total reach if several of the title's websites (or its sub-sites) are taken into consideration as constituting the Media Brand. The sites containing local information have a relatively high potential. Printed editions, however, have a greater contribution to the total reach of Media Brand than the title's web sites, even if all relevant internet sites are treated together.

According to the intuition, the strongest role of online editions in building the total reach of Media Brand is visible in group of the youngest readers (up to 24 years). This effect should be taken as a forecast of future pattern of reading behaviors.

Relatively high contribution of online editions to the total reach of Media Brand is observed among people of working age who are currently unemployed. This effect however is not explained by the age of the readers but by their information needs and the fact that title's websites satisfy them well.

The total reach of Media Brand created by the print and online editions is characterized by a lower variation over the days of the week than in the case of traditional issues which are most often read on Mondays and Fridays. This means that the title's web sites have a greater contribution to the total daily reach in the days of the week, when readership of the printed editions is lower.

Over the recent waves of the study the growing importance of online publications in the total reach of Media Brand can be seen, but it should be noted that the total reach is continuously getting lower year by year. It seems that in order to stop decrease of newspapers reach there is need for more intense increase of online readership. The growing popularity of press in the form of applications for mobile devices, which today remains on a low level should also be appreciated by the publishers.

## 6. Discussion

The study provides a number of insights on the interaction between web editions of the title and its traditional version, but the project has its limitations. The methodology, based on an on-line survey suffers from the typical problem of a very small response rate. The representativeness of the sample is ensured by the weighting procedure, however, certain sample biases cannot be excluded due to uncontrolled criteria. One cannot omit such possibility as over- or underestimated answers given by the respondents to the questions on the readership of printed versions of the newspaper.

At the stage of the analysis the number of readers of the printed edition (from the NRS) and the number of users of relevant title's websites are taken into account. This information comes from two incomparable sources. In the first case the results of research are declarative, in the second – data is derived from a passive Internet Audit Measurement conducted on a panel of internet users. Each of these measurements has its specific limitations.

It should be also remembered that up to now the study covers only one newspaper title which probably cannot serve as the basis for generalizations about the reading behavior for a wider range of titles.

The next wave of the survey is currently in the implementation phase. Its results will be able to provide information on the dynamics of the analyzed phenomenon. In particular, it can be concluded whether the drop of total reach of Media Brand (observed so far) has decreased its pace. If that happened, its source would have to be the increase in the number of visitors to title's web sites, because according to the standard readership survey there are further declines in readership of printed newspaper.

**Table 8. The dynamics of readership of the printed version of the analyzed newspaper**

	Index on the previous wave
June 2011	100
November 2011	91
July 2012	88
June 2013	87

Source: Polish NRS 2011 - 2013

The research findings are an inspiration to a conclusion that the press - regardless of its distribution platform - faces serious challenges and the on-line readership becoming more and more popular, is not however a universal answer to the publishers' problems.