

MEASURING A MEDIA BRAND ACROSS PLATFORMS PRINT FIRST VS. BRAND FIRST METHODOLOGY

Berit Puggaard, TNS Gallup
Poul Melbye, JP/Politikens Hus

1. INTRODUCTION

The future of newspaper reading on actual printed paper is uncertain with circulation and traditional readership figures that are decreasing rapidly. This is happening across the western world – and in Denmark we have seen this phenomenon accelerated in comparison to other Scandinavian countries.

All of this is taking place even though most people still have a dependency on reading news regularly. As a consequence the readers are moving to other platforms – particularly webpages – to get updated on news, sports and hobbies. What is interesting is that the brands used most often online for news purposes in Denmark are identical to brands that also have a printed version – although the ranking order of brands with most readers on print and most visits to webpages is not the same.

The movement of readers to other platforms makes it of imminent interest for newspaper publishers to create cross platforms measurements to estimate the total inventory of a news brand for the advertisers. The research done to create the basis for this paper is a step in that direction. The aim is neither to discuss what an OTS is for a website visit or printed newspaper reading nor to say one is of more value than the other. The criteria of success has been to find possible solutions to measuring cross platform use for newspaper brands utilizing multiple platforms given the current methodology of the Danish NRS and the challenges of printed newspapers in the future.

2. The Danish NRS

Today only printed newspapers and magazines are officially measured in the Danish NRS. The monthly figures are established based on the recency questions whereas the quarter annual figures are based on a frequency question per title. In the briefing of the respondent participating in the NRS survey it is specified that only newspapers on actual paper are relevant for the survey questions.

However several trials have been made to try and incorporate the reading of PDF versions of the same newspaper titles that are measured in the NRS. These trials have so far proven to have much higher levels of reading than the actual traffic data provided by the newspaper publishers themselves justifies. The problem seems to be that the respondents confuse the PDF version with visits to webpages. Numerous ways of stating the difference between two (webpages and PDF versions of a newspaper) have been tested to reach a more “correct” result, however there are (too) many steps to reach figures for the PDF versions that would seem realistic -> too many “handheld” processes when the actual (small) size of the total PDF reading is taken into consideration.

So at this point any PDF reading is not included in the NRS figures. Neither is webpage reading nor app use for that matter. But the JIC discussions makes it crystal clear that at some point the future the NRS must in some way include all reading for a given newspapers brand across all platforms (ie. on paper, in PDF, website visits and app use).

Figure 1: Average daily readership 2003 – 2012 national newspapers (dailies Monday-Saturday average daily reach in 000)

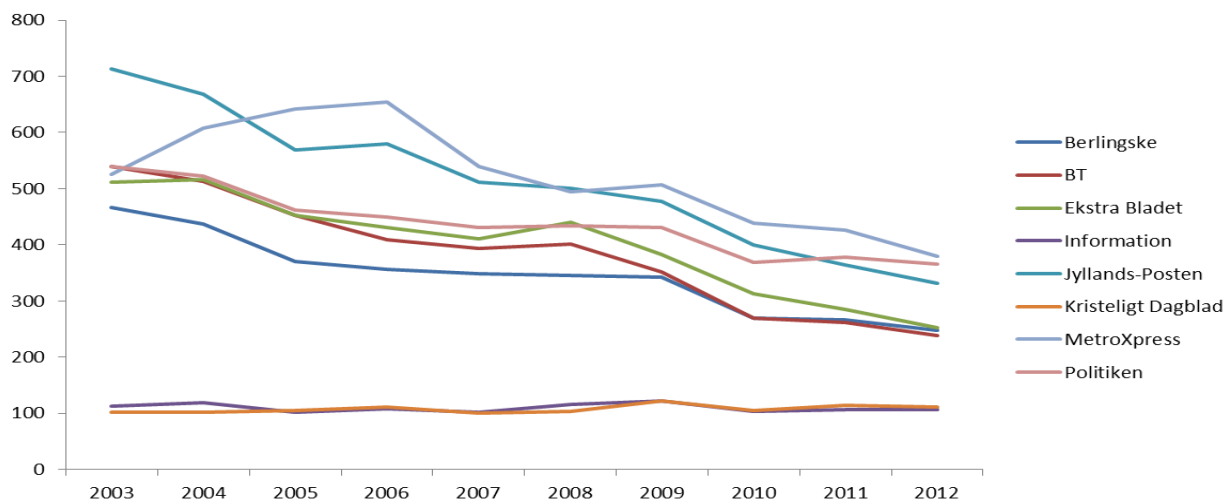
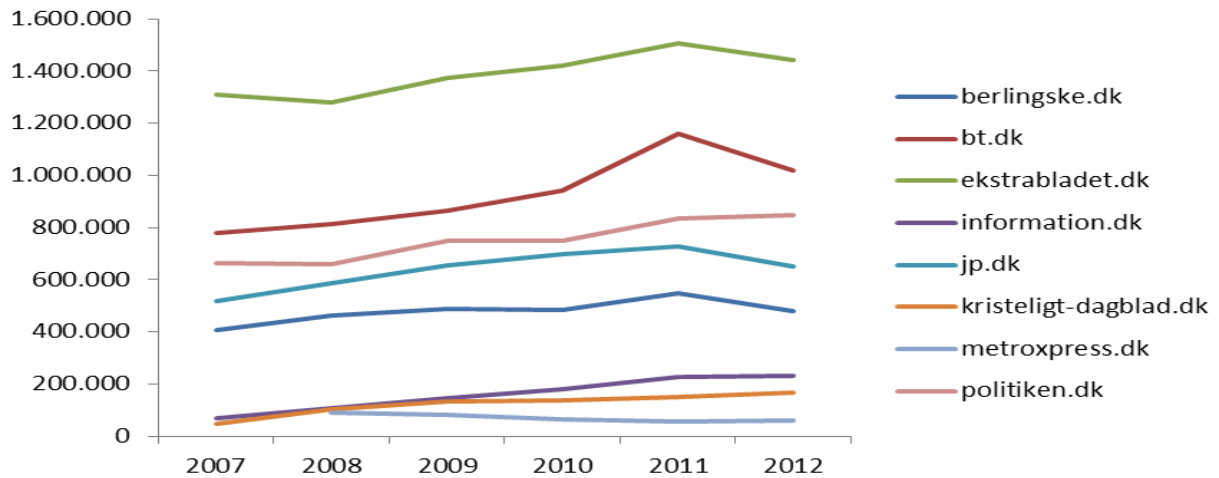


Figure 2: Average monthly visits (users) 2007 – 2012 national newspapers websites (Monday-Sunday average monthly users in 000)



3. The philosophy behind the test

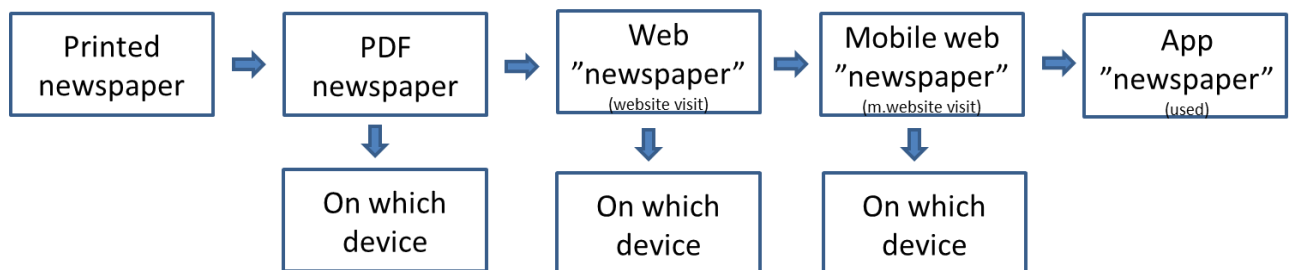
Looking to colleagues in the NRS businessⁱ we discovered a huge variety in the ways these challenges are handled as to whether digital reading is included in the printed paper NRS measurement setups at all and when included how it is accomplished. Some completely ignores the source of the reading ie. a reading is a reading regardless of whether it was done on paper or digitally. Some ask (like in Denmark) about reading of the printed version of the newspapers first, and then moves on to ask about PDF reading , webpages visits (traditional browsers or fitted mobile sites) and app usage. Typically the usage is asked either about what happened ‘yesterday’ (as a recency) or activities done within the last week (as a total weekly coverage).

We decided to try the two most opposite ways of measuring readings across all platforms and devices:

1. Print first approach
2. Brand first approach

In the print first approach the paper version of a newspaper is the first platform asked. This approach is coherent with the current Danish NRS approach (where PDF readership questions are asked after print questions are websites usage in the follow-up self completion questionnaire) and the way several other NRS systems handle cross platform readingⁱⁱ.

The order of the questionnaire in regards to the measured platforms is as follow (read/visited/used yesterday):



This methodology demands a total run through of all brands on all platforms which means that for all platforms all brands are listed and no filters are used except for follow-up questions about device(s) when a positive reading/uses situation occurs. It is extensive for the respondent to answer the print first approach however recalling yesterday’s habits by means of brand lists for all platforms is in theory made much easier for the respondent with aided lists across all platforms. Some newspapers brands have for example websites that the respondent is not aware are extensions of that brand – most often because the “look and feel” of these websites is very different from the “look and feel” of the newspaper brand universe itself. Besides that the fact that the actual name of the website may not include any part of the newspapers brand itself could create underestimation of contacts with a brand given the brand first approach.

When PDF newspaper reading was recorded a follow up question was asked as to the device(s) used for this reading. When a web “newspaper” visit was recorded a follow up question about the devices used the visit(s) was asked (via pc, tablet,

smartphone or other devices). If then a tablet or smartphone was recorded two additional follow up was asked as to whether they visited the mobile site or the regular website – or even both via each device.

The questionnaire for the brand first approach was somewhat more simplified and filters are used along the questionnaire – ie. not all respondents were asked every brand on every platform:



The clear advantage of this approach is the possibility to use the initial brand answer as filtration for the following part of the questionnaire. Hence if a brand was not mentioned on the first brand list then the respondent was not asked any more questions about that particular brand. If the brand was mentioned all points of possible contacts (platforms) was shown to the respondent to indicate which platforms had been used yesterday. And then for PDF, website, mobile site and app use additional questions as to device(s) used for each of the platforms were asked.

4. Test design and statistics

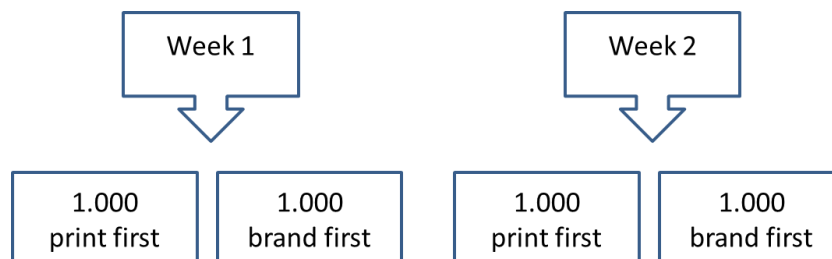
Target audience was decided to be the commercial attractive 15-60 years old.

The test was in fieldwork Tuesday-Monday weeks 39/40 and 40/41 in 2012 (Tuesday 25th of September – Monday October 1st and Tuesday October 2nd – Monday October 8th).

The test was conducted online using the TNS Gallup Denmark access panel GallupForum. These respondents are a part of the Gold Standard Panel which has 55.000 participants and they have all been recruited via CATI random digits dialing.

To eliminate/avoid random events influencing the collected data during fieldwork it was opted to run the test spread across two weeks with 1.000 respondents for each approach for both weeks.

Sample overview:



Four separate samples of 1.000 respondents were created from a preliminary screening in the GallupForum Panel. Each sample was stratified on these parameters to make sure the 4 basic samples were identical:

- Sex * age (8 groups)
- Sex * education (6 groups)
- Number of persons in household (4 groups)
- Geography (11 groups)
- Lifestyle – Gallup Kompas (9 groups)
- Housing (3 groups)
- Ownership of housing (2 groups)

The data was subsequently also weighted on the same variables.

Each respondent was asked to answer either print first or brand first approach every day for one week. The selection as to which approach was shown was random, but the same approach for shown all 7 days for the same respondent.

The response rate for the diary was much higher than expected. The estimate before the survey went into fieldwork and on which the basic samples were founded was that 50% (500 respondents) would complete all 7 days of the 7 day diary. Any respondent fulfilling less than 7 days would not be included in the results.

The overall aim was to have 1.000 interviews completed for at 7 day diary for both approaches with an even split as to the two weeks of fieldwork. However, the response rates were almost overwhelming considering the amount of the effort needed on the part of the respondents to do the diary every day for 7 days.

Response rates versions (print first vs. brand first) and sample week:

Response rates	Week 39/40	Week 40/41
Print first	786	778
Brand first	851	813

Hence all results are based on a much higher total sample than what was expected to be the case. This allowed us to look at the results in much more detail than what we had hoped for.

Response rates	Week 39/40	Week 40/41	Total
Print first	786	778	1.564
Brand first	851	813	1.664
Total	1.637	1.591	

The significant difference between the response rates for print first vs. brand first is not surprising as the average length of the questionnaire in the diary day by day is much longer for the print first test version.

The response rates by weeks are almost identical and no events of particular or unusual news interest happened during fieldwork to cause any problems in analyzing the data.

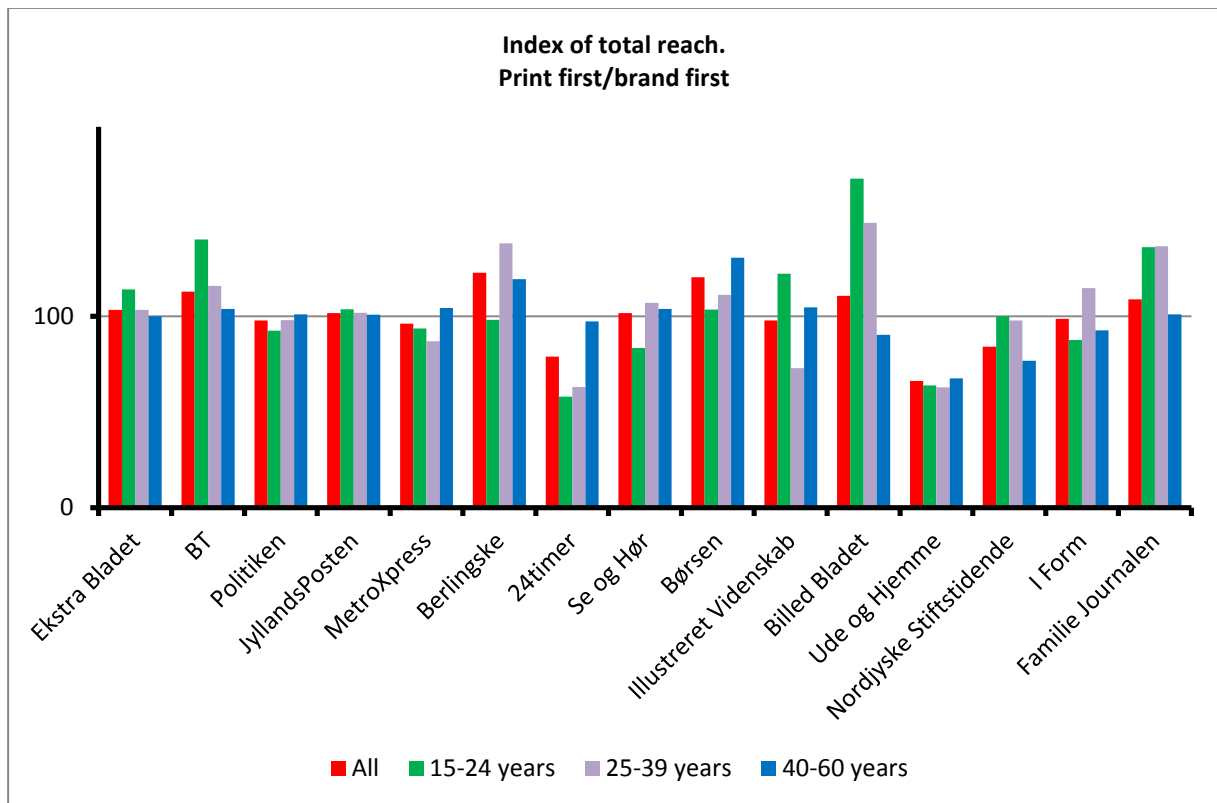
Average length week by week and test version:

Interview length	Week 39/40	Week 40/41	Total average day/week
Print first	200 sec./day	180 sec./day	190 sec./day
Brand first	111 sec./day	126 sec./day	118,5 sec./day
Total average week Print first	23,3 minutes	21,0 minutes	22,1 minutes
Total average week Brand first	12,9 minutes	14,7 minutes	13,8 minutes
Screening interview	6,75 minutes		

5. Main findings - Total reach in the two methods

As the main purpose of this test is to evaluate the effect from methodology on total reach and to evaluate if this effect is constant across different titles we will start by examining the total reach in the different methods.

In the following graph an index of total reach for the 15 largest titles is shown. An index over 100 indicates that the total reach is highest in print first and an index under 100 indicates that the total reach is highest in brand first.



It is clearly that none of the methods consistently gives the highest reach and the distribution is relatively wide – 3 titles have an index under 90, 4 titles an index over 110 and 8 titles are between 90 and 110. It is interesting to note that the three titles where total reach is highest measured with a print first approach all have very limited digital presence, however the opposite is not true. The four titles with high index are not all strong digital brands and the strongest digital brands among the 15 titles all have index around 100.

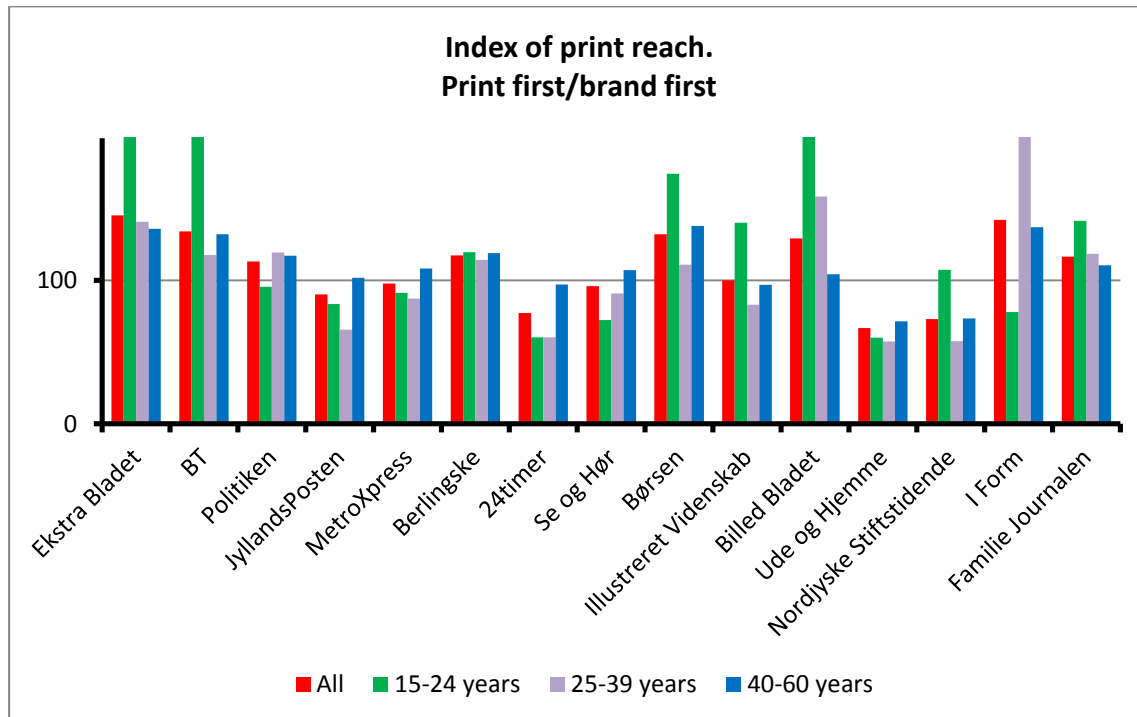
Ekstra Bladet, which is the title with the strongest digital presence of the 15 titles (and a digital presence stronger than there printed presence) is having an index of 103 so none of the methods favor this.

It is also worth noting the differences across age – again there doesn't seem to be any consistent tendency. In some cases the print first method gives the highest total reach among the younger age group and in other cases the opposite is the case. And there is no correlation with the overall index. The other demographic variables don't show the same differences as age.

By looking at total reach it is not possible to favor one method over the other.

6. Main findings - Print reach in the two methods

One of our main hypotheses is that by measuring print first the print reach will be overestimated, because respondents focus more on the brand/title than on the platform. In the figure below an index of the print reach is shown. An index over 100 indicates that the print reach is measured highest in the print first methodology and under 100 indicates that the print reach is measured lowest in the print first methodology.



Again it is not possible to draw a simple conclusion. The same titles as with the total reach are showing index below 100, meaning that even the print reach of the titles is measured highest in the brand first methodology. It is not possible to say why these titles seem to win from brand first methodology – but it is worth noting that these titles in other research are not among the strongest media brands.

Looking at the other titles there are some significant differences to the picture we saw when looking at total reach. 8 titles are having an index above 110, meaning their print reach is profiting from the print first methodology. Among these 8 titles all but one of the titles with the strongest digital presence, notably Ekstra Bladet is having a much higher print reach with print first and is the title with the strongest digital presence of all titles. The exception is Jyllands-Posten who has a digital presence on par with Politiken and Berlingske, but doesn't seem to benefit from print first methodology, there doesn't seem to be any direct explanation to this.

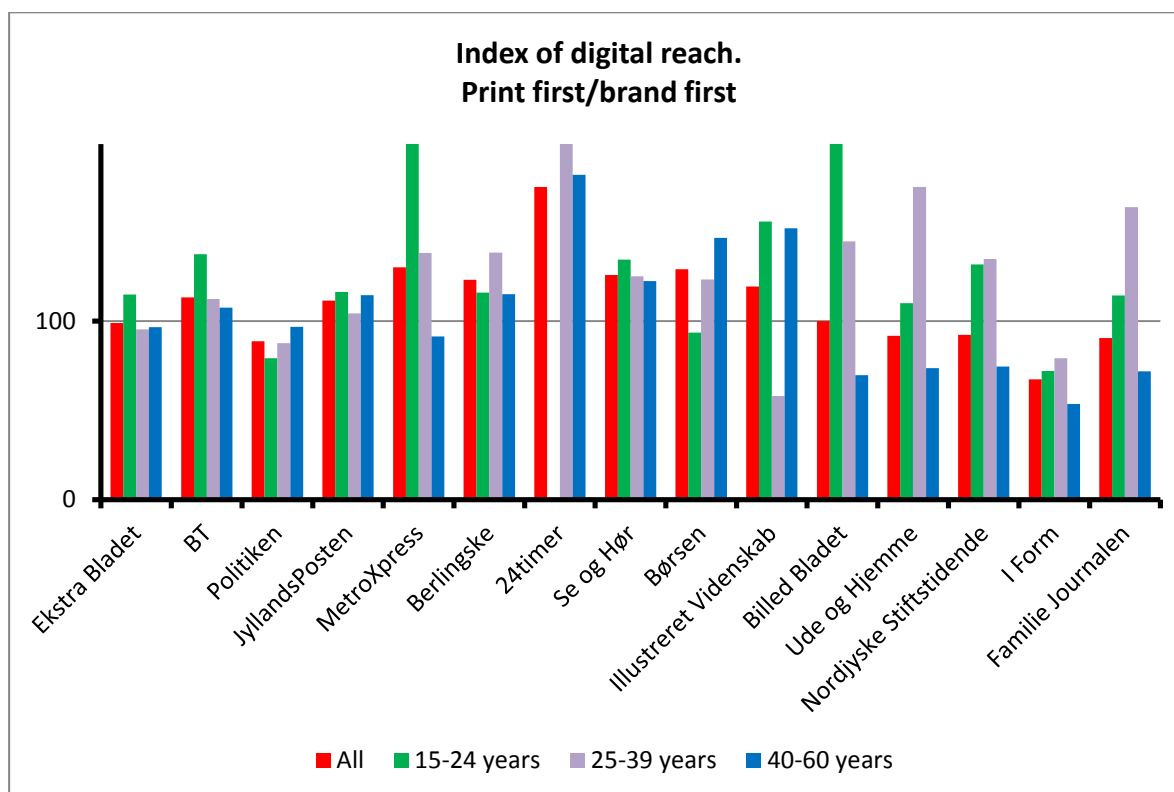
Again it is worth noting differences across age groups – a difference we don't see with other demographic variables. Especially the two tabloid newspapers, Ekstra Bladet and BT are having a much higher print reach among the younger age group when asked with print first.

Even though the conclusion is not rock solid, there seems to be a tendency to higher print reach when measured with print first and this might be an argument to work with brand first as digital presence overtakes print presence among printed titles.

7. Main findings - Digital reach in the two methods

It is quite obvious that print first methodology should give higher print reach, but what is happening with digital reach is not quite as obvious. With the print first methodology the titles are repeated for each platform and this could boost digital reach. On the other hand, in the brand first methodology there could be a tendency to allocate a positive brand answer to a digital platform as a result of excluding the printed platform (I have said yes to the title, but don't remember seeing a printed title so it must have been digital).

Again we are looking at a figure with index showing the relation between the two methodologies.



In this case 8 titles is having an index over 110, showing a higher digital reach when print is asked first. Only two titles is having an index below 90 so there seems to be a tendency that even digital reach profit from print first methodology. It is worth noting that for 8 titles the gain is actually higher at the digital reach than for print reach at the print first methodology.

8. Main findings - Duplication in the two methods

Comparing the three figures above reveals indirectly that the duplication between print and digital is higher with the print first methodology. This can be derived from the fact there is higher match between the methodologies looking at total reach, than for print and digital separately. This higher duplication can also be found if the results are broken further down on specifics such as print, epaper, web site, mobile site etc.

This could mean that the repeated mentioning of the brands drive up the number of positive responses – indicating that the respondents is more focused on the brands than on the platforms. This constitutes an argument for using brand first methodology even if the digital presence is not yet significant

9. Conclusion and looking ahead

This research have shown some interesting differences between the two methodologies but none of the conclusions can be carved in stone since some brands/titles show opposite behavior.

However there seem to be evidence that if one wants to measure more than pure printed platform in the same survey the brand first methodology should be preferred. This since the repeated mentioning of a brand result in more positive respondents to a brand and the theory that the respondent wants to claim a relation to the digital edition/presence of the brand at the earliest possible option and then also claim more digital platforms (print first).

The results indicates that a strong digital presence gives an overestimation of both printed and digital reach when measured with print first methodology and therefore brand first methodology would be recommended in situation with strong digital presence among the measured brands.

With that in mind a shift to a brand first methodology would result in lower reach figures for a number of titles constituting problems with market acceptance of such a shift, but it should be noted that the overestimation most likely will grow over time.

ⁱ NRS's in Europe all have very different ways of asking print and digital reading. Some ask about titles alone (and does not distinguish between print or any digital versions) like in Hungary and Ireland.

Others use paper first methodology as a print only methodology where no other versions of the brands are measured– like in Russia, others a print first and digital secondary approach – like in Finland and Norway. In Belgium another version of print first is used – but it is asked title by title as to print first and then digital for the same title.

The only NRS (to our knowledge) that runs print and digital as truly equally treated platforms are in the US, where the solution is the closest to the brand first approach as used for this test.

ⁱⁱ Countries such as Norway, Finland and partially the UK (JICREG) where the questions for print and digital are identical to allow for integration of data and calculation of portfolio reach.