An Enhanced Target: The 'Key Audience'

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Introduction

This paper seeks to make the case for newsbrands as a high-value proposition for multi-media communication.

Marketers want to know who their communications are reaching, and that their messages are being delivered in a safe environment. Newsbrands offer these benefits, but the automated execution of much digital advertising means that many brands risk not taking advantage. The combination of traditional media research with passively-collected online and mobile measures presents rich opportunities. It allows newsbrands to support cross-platform offers, and planners to construct valuable target audiences which can be targeted across print and digital formats.

Summary

The audience for newsbrands in their traditional printed format has been in decline in many markets for year, although there are exceptions such as India. Many of the newsbrands have a large digital audience, although much online contact is transient. The decline in hard copy reading has had the consequence for publishers of declining revenues from traditional hard-copy advertising formats. This loss of traditional revenue has not been matched by equivalent growth in revenues derived from digital advertising.
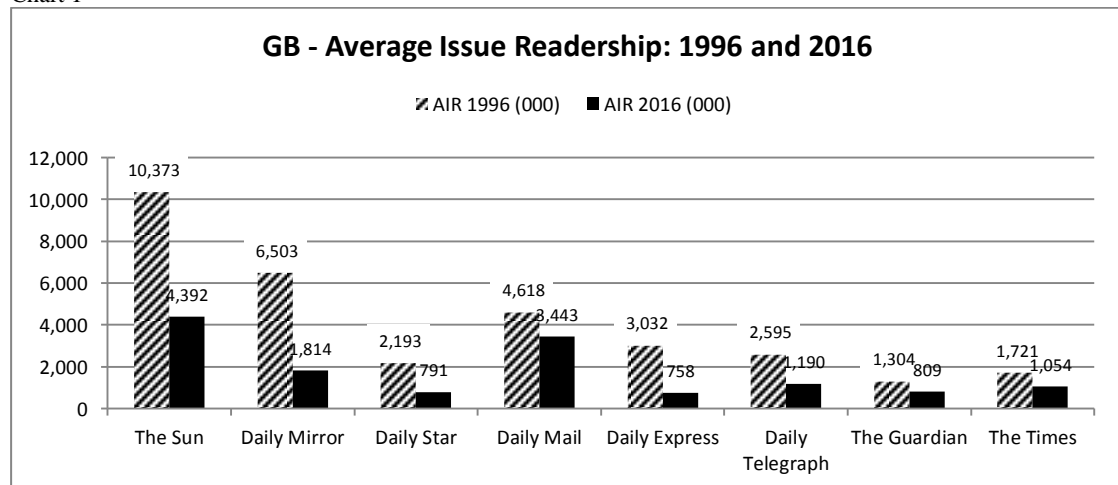
The integration of research measuring traditional print audiences with digital behaviours allows the creation of new target audience concepts which represent the readers who are the most engaged across platforms. These permit newsbrands to make the case for advertising campaigns across both print and digital platforms. Even in India, where many newsbrands are growing in their hard copy formats, the concept works.

AIR has been the norm for generations. We believe that the argument in favour of enhanced target audience definitions such as the 'Key Audience' and 'Key Multiple Device Audience' is strong and persuasive. We hope that concepts such as these will help newsbrands to make their case as premium publishers.

The hard-copy audience for newsbrands

20 years since the internet begin playing a part in consumers' lives, the reading of newspapers in hard copy continues to fall in most parts of the world. Taking the British national newspaper market as an example, Chart 1 shows a grim picture of decline from 1996 to 2016. The aggregate drop is 55%. The Daily Mail has suffered least, down 'only' 25% in readership; other tabloid titles are between 50% and 75% down. Among the broadsheets, the Guardian and the Times have seen the best retention, with hard copy decline of 38% and 39% respectively.

Chart 1

GB - Average Issue Readership: 1996 and 2016

AIR 1996 (000) ■ AIR 2016 (000)

Title	AIR 1996 (000)	AIR 2016 (000)
The Sun	10,373	4,392
Daily Mirror	6,503	1,814
Daily Star	2,193	791
Daily Mail	4,618	3,443
Daily Express	3,032	758
Daily Telegraph	2,595	1,190
The Guardian	1,304	809
The Times	1,721	1,054

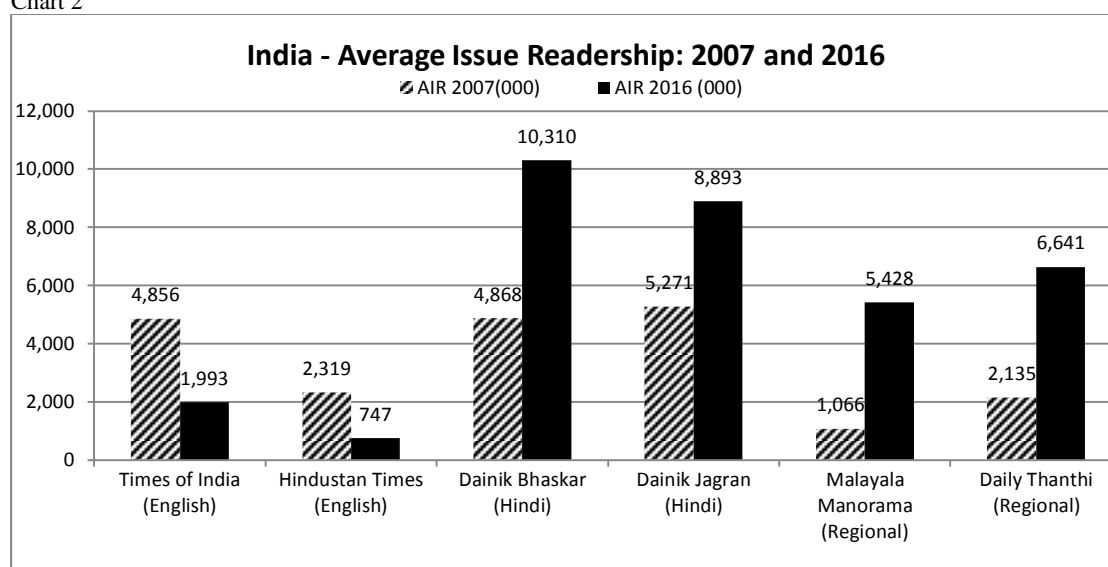**Source: National Readership Survey (NRS)**

The story is similar for print editions in many markets. One major exception however is India. Today, while the world is moving away from print to digital, India is showing a very different trend where both forms of media are growing at the same time.

The growth is coming both in overall media consumption and in the number of media being launched to satisfy demand. So while digital penetration increased by 31.5% in the last year, no fewer than 5,423 new print publications were registered during this same period. Interestingly, print and digital media are growing in the same markets. (Source : Livemint, December 2016)

A comparison of the readership levels of the print editions Indian dailies in 2016 vis-a-vis 2007 shows a fascinating picture. (Chart 2). While there has been a decline in the hard copy readership of most English-language dailies, the readership of many Hindi and regional Language publications has increased dramatically:

- The readership of the two leading English dailies The Times of India and Hindustan Times has declined by 59% and 68% respectively.
- Amongst the Hindi dailies, the two leading publications Dainik Bhaskar and Dainik Jagran have experienced increases of 112% and 69% respectively.
- The Regional dailies have shown an even bigger growth trend: Malayala Manorama (a leading Malayalam daily) has grown by 409% and Daily Thanthi (a leading Tamil daily) by 211%.

Chart 2

India - Average Issue Readership: 2007 and 2016

AIR 2007(000) · AIR 2016 (000)

	Times of India (English)	Hindustan Times (English)	Dainik Bhaskar (Hindi)	Dainik Jagran (Hindi)	Malayala Manorama (Regional)	Daily Thanthi (Regional)
AIR 2007(000)	4,856	2,319	4,868	5,271	1,066	2,135
AIR 2016 (000)	1,993	747	10,310	8,893	5,428	6,641

So the English-language titles, readership of which is long-established and largely concentrated in the major cities, have had a similar experience to that of newsbrands in western markets such as the GB case illustrated above. At the same time the Hindi and Regional titles have multiplied their readerships on the back of a number of factors. We hypothesise these as being:
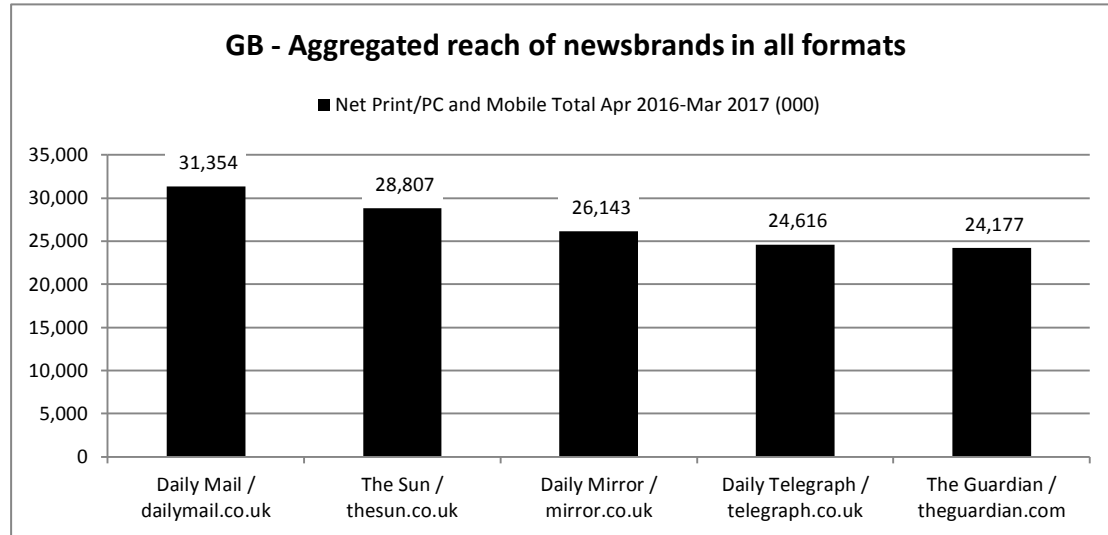
- Rising literacy and education levels, which provide the opportunity to be better informed.
- Better availability of newspapers in different languages, resulting in India's newspaper market appealing to millions of non-English-speaking readers.
- Technology making it commercially viable for newspapers to be printed in a variety of regional languages.
- The evolving quality of newspapers, with more varied content, better design, etc.
- A reading habit which is still ingrained in the older audiences, so their loyalty has been maintained.
- The availability of 'free' content (not paid for) on the internet serves a kind of marketing function. It helps to create the desire for news, and can offer 'on-the-go' updates, but the reader interested in deeper understanding will still seek out a printed newspaper for just a small monetary outlay.

While literacy continues to grow, we believe that people from the lower socio-economic groups will continue to enter the market for regional titles in particular, and hard copy reading will continue to increase. The technical advances in printing, with quality up and costs down, have allowed the publishers to make their products more affordable and to invest in better quality content. The dynamics benefit all parties: reader, publisher and advertiser.

The digitally-expanded audience for newsbrands

The fact that newsbrands today produce digital versions in several formats allows for much larger total audiences to be reported. For example, five British newsbrands can now claim total reach of over 20,000,000 according to the broadest definition reported by NRS PADD. (Chart 3):

Chart 3

GB - Aggregated reach of newsbrands in all formats

■ Net Print/PC and Mobile Total Apr 2016-Mar 2017 (000)

Daily Mail / dailymail.co.uk	The Sun / thesun.co.uk	Daily Mirror / mirror.co.uk	Daily Telegraph / telegraph.co.uk	The Guardian / theguardian.com
31,354	28,807	26,143	24,616	24,177

Source: NRS PADD (NRS integrated with comScore March 2017)

In comparison with 1996, when the largest number reported by NRS was of those who had read the hard copy in the past year, the aggregate number of people who have a reported contact with newsbrands has increased significantly – to 31.4 million in the case of the Daily Mail.

Of course this is only a measure of equivalence at one level. These headline figures may represent a newsbrand's maximum 'footprint', but they don't realistically represent the audience that a brand might reach, nor allow that audience to be profiled. The press releases may lead with them, but planners need to dig deeper into the NRS numbers to find the information that can help them.
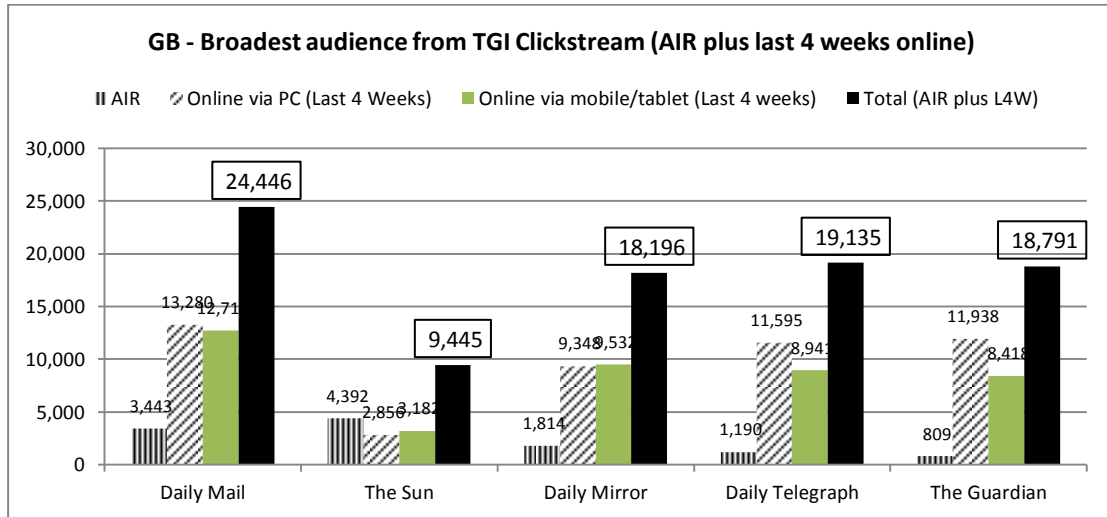
NRS PADD information was also used by Neil Thurman in his recent paper "*Re-assessing multi-platform performance and market share using 'time spent'*". Comparing hard copy and online reading, one of his observations is that:

"PADD shows that the – increasingly scarce – print reader is a more loyal consumer, and that newspapers' online editions are not a daily destination in the way that their print editions have been. For example, although, on a daily basis, UK national newspapers have an average reach of 1,531,000 via their print editions, they have an average reach of just 578,000 via personal computers".

He observes too that reach, while measuring exposure, tells us nothing about how profound that exposure was. He goes on to reference estimated average daily engagement times for UK national newspapers of 40 minutes for print readers but less than 30 seconds for online visitors.

Studies such as TGI Clickstream, by publishing granular data obtained from the combination of traditional methods with passive measurement, permit us to analyse the online audience to newsbrands in a detailed manner. They include measures of the total numbers coming into contact with a newsbrand in different formats. For GB, as these too show the broadest measured audience through both PC and mobile or tablet (that is, for the last four weeks) to be very large – much larger than Average Issue Readership for the free-access sites. The outlier here is The Sun, which operates an online paywall. (Chart 4).
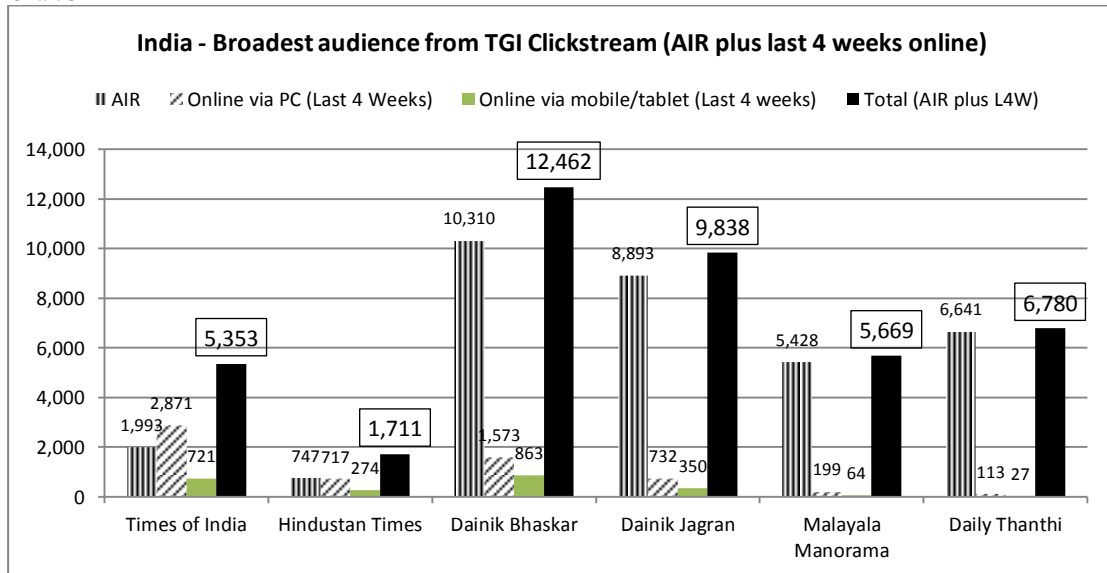
Chart 4

GB - Broadest audience from TGI Clickstream (AIR plus last 4 weeks online)

Legend: ▮ AIR ▨ Online via PC (Last 4 Weeks) ▮ Online via mobile/tablet (Last 4 weeks) ▮ Total (AIR plus L4W)

Daily Mail: 3,443 | 13,280 | 12,716 | 24,446
The Sun: 4,392 | 2,856 | 3,182 | 9,445
Daily Mirror: 1,814 | 9,348 | 9,532 | 18,196
Daily Telegraph: 1,190 | 11,595 | 8,941 | 19,135
The Guardian: 809 | 11,938 | 8,418 | 18,791

For India, we see again that the story for the English-language newsbrands is quite similar to the GB titles, in that their decline in hard copy readership has been compensated for – at least in terms of aggregated reach – by the broadest digital audience. Thus the total reach of the Times of India is 5.35m, compared to an AIR of 4.39m in 2013 but 1.99m now that we saw in Chart 2 above. The total reach of the Hindustan Times is 1.71m, compared to an AIR of 1.85m in 2013 but 0.75m now. (Chart 5).

It's important to note for India that these numbers for online and mobile access only cover reading that takes place on the sites operated by the publishers themselves. A lot of reading in India takes place through aggregators – UC News and Google being examples – and this cannot be isolated and attributed to a particular publication. One reason why readers go through aggregators is in order to obtain various points of view, and this route provides an easy method of going to each individual publication to get a different opinion.

Chart 5

India - Broadest audience from TGI Clickstream (AIR plus last 4 weeks online)

Legend: ▮ AIR ▨ Online via PC (Last 4 Weeks) ▮ Online via mobile/tablet (Last 4 weeks) ▮ Total (AIR plus L4W)

Times of India: 1,993 | 2,871 | 721 | 5,353
Hindustan Times: 747 | 717 | 274 | 1,711
Dainik Bhaskar: 10,310 | 1,573 | 863 | 12,462
Dainik Jagran: 8,893 | 732 | 350 | 9,838
Malayala Manorama: 5,428 | 199 | 64 | 5,669
Daily Thanthi: 6,641 | 113 | 27 | 6,780

Levels of online readership for the Hindi and regional newsbrands are much lower. While the aggregated audience for the Times of India and the Hindustan Times are respectively 169% and 129% higher than their AIRs, the comparative increases for the Hindi are 21% for Dainik Bhaskar and 11% for Dainik Jagran. For the regional titles Malayala Manorama and Daily Thanthi, online reach is much smaller and the increases they bring about are just 4% and 2%.

So at this point in the development of the market in India, the majority of reading to the Hindi and regional newsbrands is to their print editions. These have been growing rapidly, as we saw above.

We believe that there are two main reasons for the higher incidence of online readership in English publications vis-a-vis the regional language publications. Firstly, the profile of the readers: the English newspaper reader is more upmarket, better educated, and has a greater propensity to using the internet. Secondly, the availability and quality of content: the width and depth of regional content on the internet is not as evolved as that of the English content available.

Isolating the core digital readers from the transient majority

As already noted, while it's possible to measure a newsbrand's maximum 'footprint', such a figure doesn't give a helpful representation of the audience that a brand might reach, nor allow that audience to be profiled.

The TGI Clickstream studies allow us to dig much more deeply. Using them, we can identify 'core' digital readers who spend considerable amounts of time on the newsbrand's platform, and isolate them from the more transient visitors who might be categorised as 'passing through'.

We contend that these 'core' readers are the most valuable to both publishers and planners. They represent the audience that can feasibly be monetised by the publisher; equally their level of engagement makes them the key target for brand communications being put in place by planners. In short, it's when they stick around on the platform that they are valuable to both.

Let's examine how we can identify this key audience.

Looking at visitors to online editions via PC, GB data from 2016 show that a significant proportion make only one visit in the four-week measurement period. For the biggest four newsbrands in GB, the figure is over 40% in all cases. It's 54% for mirror.co.uk.

A further 40%+ make between 2 and 10 visits across the four weeks. The proportion making 11 or more visits is small: almost 17% for Mail Online and below 10% for the other three newsbrands analysed. (Table 6).

Table 6

Visits made to online edition via PC: last 4 weeks - GB

	Mail Online		theguardian.com		telegraph.co.uk		mirror.co.uk	
	000	Profile %	000	Profile %	000	Profile %	000	Profile %
Total Audience	13280	100%	11938	100%	11595	100%	9348	100%
1 visit (L4W) PC	5672	42.7%	5488	46.0%	5315	45.8%	5053	54.1%
2-10 visits (L4W) PC	5379	40.5%	5571	46.7%	5754	49.6%	3757	40.2%
11-50 visits (L4W) PC	1515	11.4%	658	5.5%	434	3.7%	405	3.7%
Over 50 visits (L4W) PC	715	5.4%	222	1.9%	92	0.8%	133	0.8%

Source: GB TGI Clickstream 2016 Q3 (April 2015 - March 2016)

The Mail Online site also outperforms the other three GB sites analysed when we look at averaged metrics, as shown in Table 7a. It achieves around double the number of average visits (10.3) and also the number of page views (35) when compared to the other sites. The average time spent by each visitor is 132 minutes, compared to 38 minutes for theguardian.com and just over 20 minutes for telegraph.co.uk and mirror.co.uk.

Table 7a

Average metrics for online edition via PC: last 4 weeks - GB

	Mail Online	theguardian.com	telegraph.co.uk	mirror.co.uk
Average Number of Visits (L4W) PC	10.3	4.9	3.7	3.9
Average Page Views (L4W) PC	35.0	18.0	12.1	9.6
Average Time on Site - minutes (L4W) PC	132.0	38.4	20.7	21.6
Average Time per visit - minutes (L4W) PC	5.4	4.3	4.7	3.6

Source: GB TGI Clickstream 2016 Q3 (April 2015 - March 2016)

However these metrics are averaged across all visitors to each site. We have already seen that a high proportion of visitors to each site only visit a few times in a month. Around half only make one visit.

This pattern of behaviour isn't restricted to GB. Other TGI Clickstream studies show that it's repeated for leading newsbrands in other markets.

In France, reader behaviour is similar for the three online newsbrands shown: Le Monde, Le Figaro and laparisien.fr. Also shown is the the sports title lequipe.fr and its metrics stand out, with twice as many visits and page views achieved. Perhaps there's a sense among its readers that sports news changes fastest of all. Again, the differences compared to the 'long tail' are vast. (Table 7b).

Table 7b

Average metrics for online edition via PC: last 4 weeks - France

	Le Monde	Le Figaro	leparisien.fr	lequipe.fr
Average Number of Visits (L4W) PC	4.7	5.3	3.7	7.6
Average Page Views (L4W) PC	12.1	17.4	15.1	38.4
Average Time on Site - minutes (L4W) PC	24.6	25.5	23.3	67.1
Average Time per visit - minutes (L4W) PC	3.6	3.9	4.8	4.9

Source: TGI Clickstream FR 2016R2

Looking at Germany, the online metrics for the popular title bild.de, with its mix of content, are stronger than those for the titles focusing more narrowly on news and current affairs. Here we have included two sites connected with news magazines, which represent such a major part of the news landscape in Germany. Their basic metrics are in the same range as those associated with hard copy newspapers (welt.de is shown here, and this is also true for sueddeutsche.de and faz.net) and with the 'broadsheet' newsbrands in France and GB. Among the sites analysed across the three European markets, it's Mail Online and bilt.de which have the most generalist content and also generate the highest overall levels of PC-based traffic. (Table 7c).

Table 7c

Average metrics for online edition via PC: last 4 weeks - Germany

	bild.de	welt.de	Focus Online	spiegel.de
Average Number of Visits (L4W) PC	7.3	2.1	2.7	3.9
Average Page Views (L4W) PC	42.6	11.2	8.0	20.0
Average Time on Site - minutes (L4W) PC	71.0	10.5	9.4	18.3
Average Time per visit - minutes (L4W) PC	5.8	4.2	3.1	2.3

Source: Germany TGI Clickstream 2016r2

When we look into the TGI Clickstream data in India, we see different patterns by type of newsbrand. As Table 7d shows, the Hindi titles have the highest number of average page views – 84 per month for Dainik Bhaskar and 69 for Dainik Jagran. For the English and regional titles average page views are between 50 and 60.

Also readers seem to spend more time with the online version when it comes to the Hindi and regional titles than with English dailies. One reason for the English titles being lower is the amount of reading that takes place through the aggregators and is not attributed to the publications. The English daily reader seems to go to the online version to get a quick bite of what is happening, and then to get the various points of view from the aggregators.

Also there is less availability of news content in Hindi and regional languages overall on the internet, meaning less competition for the online editions of the newspapers. This results in readers spending more time with the online editions than is the case with the English titles.

Thirdly, for the regional newsbrands the hard copy is read within the local geographical market. People who have moved away to other parts of India have no opportunity to read the hard copy, and have no alternative but to read the online edition, on which they may spend a lot of time.

Table 7d

Average metrics for online edition via PC: average month - India

	Times of India	Hindustan Times	Dainik Bhaskar	Dainik Jagran	Malayala Manorama	Daily Thanthi
Average Page Views - PC	57	51	84	69	58	51
Average Time Spent (minutes) - PC	23	16	55	46	50	29

Source: TGI & Clickstream India 2016 Wave 2

The importance of the heaviest 20% of visitors

Data presented at the 2015 PDRF showed the importance of the heaviest 20% of online readers. More recent GB TGI Clickstream data show that this remains the case. The heaviest 20% make roughly four times the number of visits when compared to the average visitor, with four times as many page views and over four times the total amount spent on the site. These heaviest visitors to Mail Online spend around over 10 hours (635 minutes) on the site in a four-week period. For guardian.com the heaviest viewers spend 177 minutes, or around three hours.

The differences between the heaviest 20% and the 'long tail' are huge. Compared to the 635 minutes spent on Mail Online by the heaviest 20%, the next 30% spend just 14 minutes. The other 50% – that is, half of all visitors – spend an average of 1.1 minutes. The ratios for theguardian.com are similar: 177 minutes for the heaviest 20%, 8 minutes for the next 30% and 1.2 minutes for the most transient 50%. (Table 8a).

Table 8a

Clickstream metrics by dwell time via PC: last 4 weeks - GB

	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
Mail Online: Clickstream metrics				
Average Number of Visits (L4W) PC	10.3	42.3	3.5	1.6
Average Page Views (L4W) PC	35.0	160.0	7.2	2.1
Average Time on Site - minutes (L4W) PC	132.0	635.0	14.3	1.1
	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
theguardian.com: Clickstream metrics				
Average Number of Visits (L4W) PC	4.9	16.1	3.1	1.5
Average Page Views (L4W) PC	18.0	75.3	6.3	2.0
Average Time on Site - minutes (L4W) PC	38.4	177.0	8.0	1.2

Source: GB TGI Clickstream 2016 Q3 (April 2015 - March 2016)

The ratios are similar for newsbrand sites in other major European markets for which Clickstream data exists. Again the top 20% dominate. Looking first at France, the behaviour in relation to the sites for Le Monde and Le Figaro is strikingly similar, especially in terms of time spent on site: 111 minutes for the top 20% of Le Monde readers, and 114 minutes for the top 20% of Le Figaro.

For the sports-based site lequipe.fr, the metrics for the top 20% are even more strikingly dominant – for example 321 minutes on site. As noted above, this suggests that sports news can be particularly sticky. (Table 8b).

Table 8b

Clickstream metrics by dwell time via PC: last 4 weeks - France

	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
Le Monde: Clickstream metrics				
Average Number of Visits (L4W) PC	4.7	10.6	5.2	2.0
Average Page Views (L4W) PC	12.1	42.0	8.0	2.6
Average Time on Site - minutes (L4W) PC	24.6	111.0	6.6	0.8
	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
Le Figaro: Clickstream metrics				
Average Number of Visits (L4W) PC	5.3	14.6	4.9	1.8
Average Page Views (L4W) PC	17.4	65.3	9.7	2.9
Average Time on Site - minutes (L4W) PC	25.5	114.0	7.4	0.9
	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
lequipe.fr: Clickstream metrics				
Average Number of Visits (L4W) PC	7.6	24.3	5.7	2.1
Average Page Views (L4W) PC	38.4	168.0	11.4	2.8
Average Time on Site - minutes (L4W) PC	67.1	321.0	8.0	0.9

Source: TGI Clickstream FR 2016R2

In Germany, the ratios are similar, with the importance of the top 20% again clearly seen. In general for page views and time spent on site, the top 20% outscore the average visitor by a factor of four to five. For bilt.de and Spiegel.de, they outscore even the middle 30% by a factor of around 20. The ratios are less extreme for welt.de. (Table 8c).

Table 8c

Clickstream metrics by dwell time via PC: last 4 weeks - Germany

	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
bild.de: Clickstream metrics				
Average Number of Visits (L4W) PC	7.3	28.5	3.3	1.2
Average Page Views (L4W) PC	42.6	186.0	13.2	3.1
Average Time on Site - minutes (L4W) PC	71.0	323.0	16.9	2.4
	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
welt.de: Clickstream metrics				
Average Number of Visits (L4W) PC	2.1	5.6	1.6	1.0
Average Page Views (L4W) PC	11.2	38.7	7.1	2.6
Average Time on Site - minutes (L4W) PC	10.5	37.1	6.6	2.1
	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC	Time on Site - Middle 30% (L4W) PC	Time on Site - Bottom 50% (L4W) PC
spiegel.de: Clickstream metrics				
Average Number of Visits (L4W) PC	3.9	14.0	1.8	1.1
Average Page Views (L4W) PC	20.0	88.3	4.4	2.0
Average Time on Site - minutes (L4W) PC	18.3	84.3	3.4	0.7

Source: Germany TGI Clickstream 2016r2

The TGI Clickstream data for India once again show the importance of the heaviest 20% of online visitors. This is especially true for the readers of the online version of the Hindi publications, for the reasons described above. Table 8d illustrates this in respect of average numbers of page views per month.

Table 8d

Clickstream metrics by dwell time via PC: last 4 weeks - India

	All Visitors (L4W) PC	Time on Site - Top 20% (L4W) PC
Times of India: Average Page Views (L4W) PC	57	77
Dainik Bhaskar: Average Page Views (L4W) PC	84	200
Dainik Jagran: Average Page Views (L4W) PC	69	138
Manoramaonline: Average Page views (L4W) PC	58	73

Source: TGI Clickstream India 2016 Wave 2

This confirms that the conclusion from the 2015 PDRF paper still applies, and also that it applies in all countries analysed.

The heaviest 20% of online visitors can clearly be regarded as an audience of great potential for planners. Their level of engagement with newsbrands is clearly strong.

The level of engagement of Average Issue Readers has long been considered strong enough for them to be judged a valuable target. We contend that the heaviest 20% of online readers are the online equivalent. As such, publishers could focus on this audience when seeking to monetise their online proposition.

Going further, one could put the two groups together to create a combined target. Let's call this the 'Key Audience'.

The 'Key Audience'

This definition of Key Audience nets together the Average Issue Readers and the heaviest 20% of online readers for a newsbrand. There is of course a certain level of overlap between the two, but it is not generally large. Chart 9a shows this Key Audience and its two components for GB:
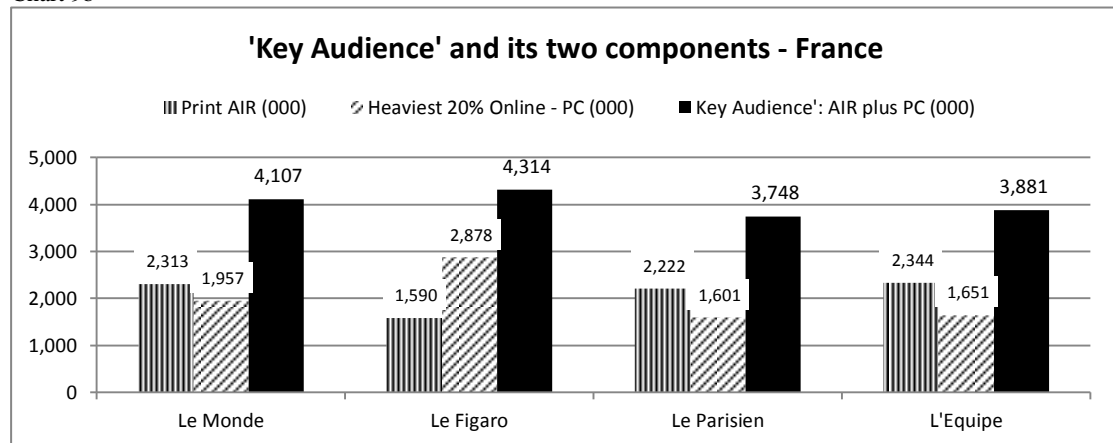
Chart 9a
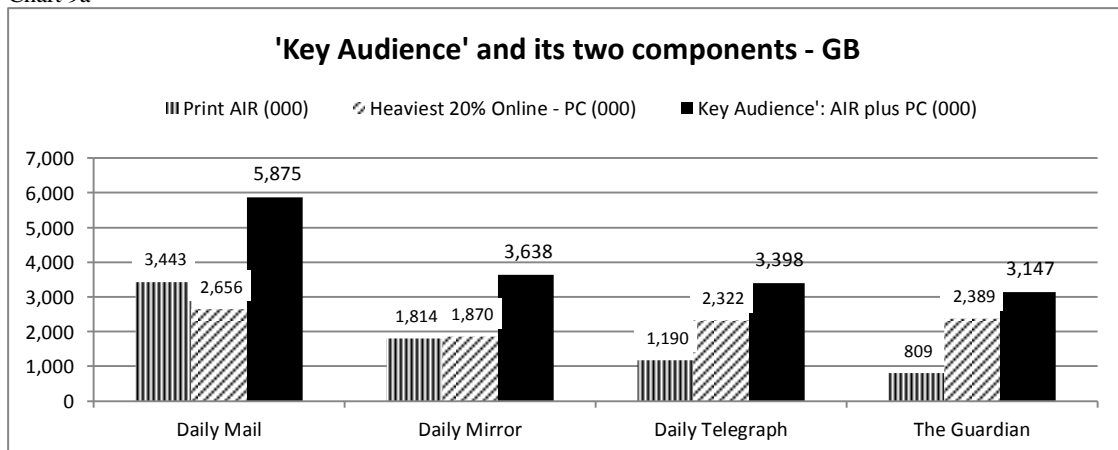
Source: GB TGI Clickstream 2016 Q3 (April 2015 - March 2016)

In all four cases, the combination of these two engaged audience components gives a total audience that is significantly greater in size than each of the two separately, yet is we believe credible in its overall size as well as in its behaviours.

The same is true for France, where the audience sizes for the four titles being analysed are similar to those for GB (Chart 9b):
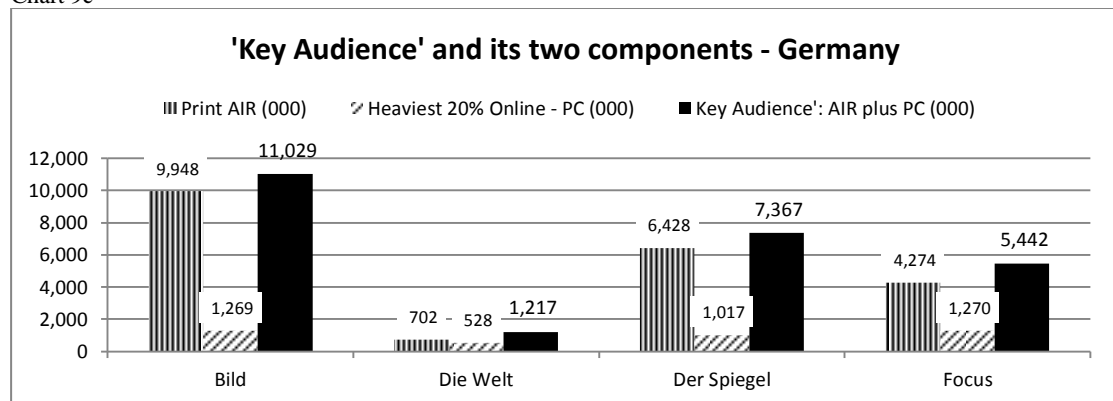
Chart 9b

'Key Audience' and its two components - France

Ⅲ Print AIR (000)　　✍ Heaviest 20% Online - PC (000)　　■ Key Audience': AIR plus PC (000)

	Le Monde	Le Figaro	Le Parisien	L'Equipe
Print AIR (000)	2,313	1,590	2,222	2,344
Heaviest 20% Online - PC (000)	1,957	2,878	1,601	1,651
Key Audience': AIR plus PC (000)	4,107	4,314	3,748	3,881

In Germany however, the Key Audience is much closer to the Print AIR in size. This is largely due to the much larger size of the Print AIRs – at least for Bild, Der Spiegel and Focus. The online newsbrand audiences are smaller than in GB or France (although they are certainly not tiny) meaning that the addition of the heaviest 20% to create the Key Audience definition contributes a smaller increase in size. (Chart 9c).
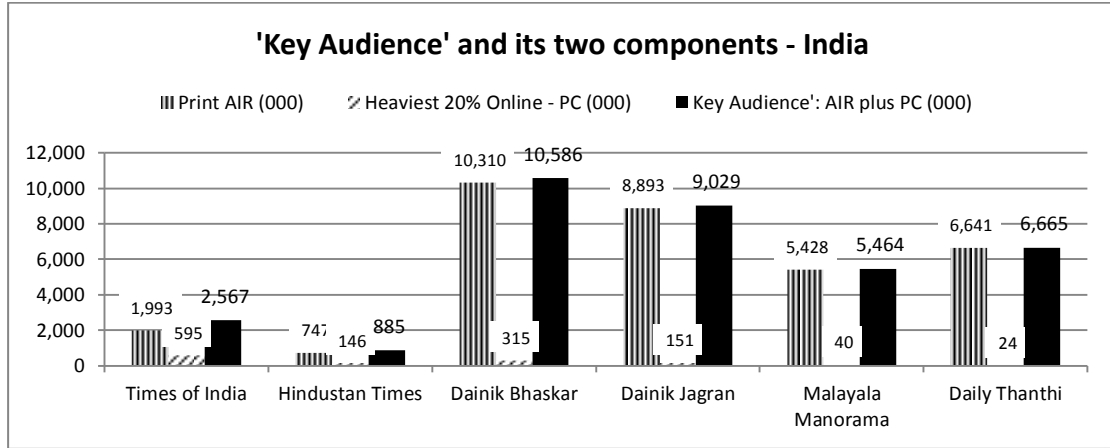
Chart 9c

'Key Audience' and its two components - Germany

Ⅲ Print AIR (000)　　✍ Heaviest 20% Online - PC (000)　　■ Key Audience': AIR plus PC (000)

	Bild	Die Welt	Der Spiegel	Focus
Print AIR (000)	9,948	702	6,428	4,274
Heaviest 20% Online - PC (000)	1,269	528	1,017	1,270
Key Audience': AIR plus PC (000)	11,029	1,217	7,367	5,442

The Key Audience can also be built in India from TGI Clickstream information. Currently the print component dominates over the online component within the definition. (Chart 9d). The pattern for the Times of India and the Hindustan Times most closely resembles the German titles, with the heaviest online 20% making a reasonably sizeable contribution to the size and composition of the Key Audience. For the Times of India, for example, the Key Audience of 2,567,000 is 29% higher than the AIR of 1,993,000.

For the Hindi and especially the regional titles, the much smaller size of the online audience relative to the large print audience (shown in chart 5 above) means that, for now at least, the concept of the Key Audience is less vital. Adding the top 20% of online readers to the AIR produces only a marginal percentage increase in size. The Key Audience of 10,586,000 for Dainik Bhaskar is 2.7% higher than the AIR of 10,310,000; even so it still adds 276,000. The increase for Dainik Jagran and the regional titles is even less.

Time will tell whether this will change in the future, should patterns of reading to the different editions of newsbrands evolve in the same way as they have in other markets. We anticipate that the numbers accessing the digital offerings may well grow quickly, and the demand for multi-platform packages may grow quickly with it.
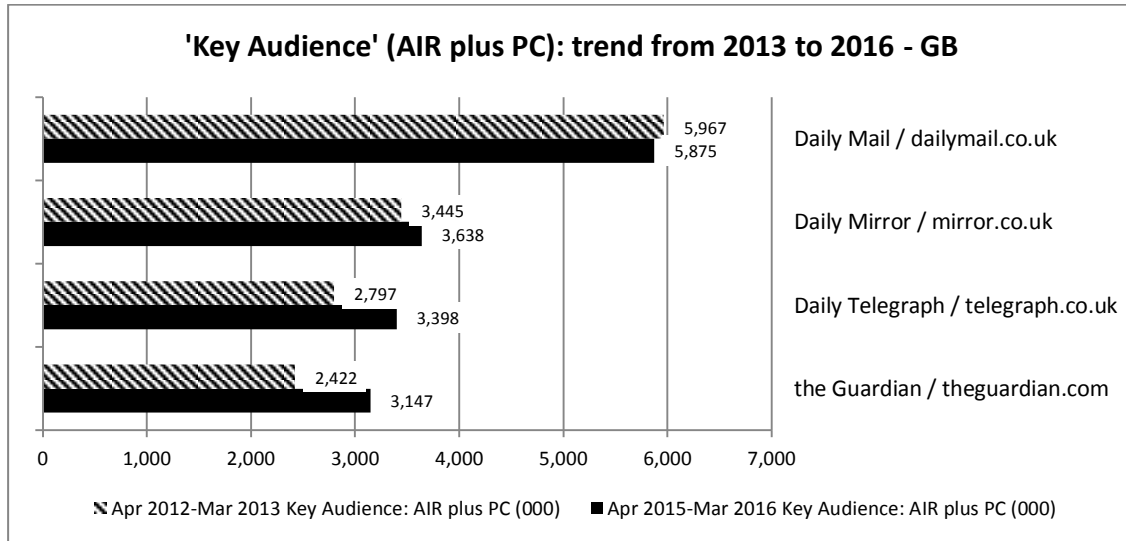
Chart 9d

'Key Audience' and its two components - India

Ⅲ Print AIR (000) ⬚ Heaviest 20% Online - PC (000) ■ Key Audience': AIR plus PC (000)

	Times of India	Hindustan Times	Dainik Bhaskar	Dainik Jagran	Malayala Manorama	Daily Thanthi
Print AIR	1,993	747	10,310	8,893	5,428	6,641
Heaviest 20% Online - PC	595	146	315	151	40	24
Key Audience': AIR plus PC	2,567	885	10,586	9,029	5,464	6,665

Demonstrating platform growth

Where relevant – which will be in all cases where a newsbrand has a significant online audience – publishers could use this concept to define the size of their Key Audience to planners. At a basic level, it would allow them to tell a positive and credible story about audience increases. With mobile penetration continuing to grow, one might expect an overall picture of growth, and for the four GB newsbrands featured – with the exception of the static picture for the Daily Mail / Mail Online – this is indeed the case. (Chart 10).

Chart 10

'Key Audience' (AIR plus PC): trend from 2013 to 2016 - GB

Newsbrand	Apr 2012-Mar 2013 Key Audience: AIR plus PC (000)	Apr 2015-Mar 2016 Key Audience: AIR plus PC (000)
Daily Mail / dailymail.co.uk	5,967	5,875
Daily Mirror / mirror.co.uk	3,445	3,638
Daily Telegraph / telegraph.co.uk	2,797	3,398
the Guardian / theguardian.com	2,422	3,147

⧗ Apr 2012-Mar 2013 Key Audience: AIR plus PC (000) ■ Apr 2015-Mar 2016 Key Audience: AIR plus PC (000)

This is a much more positive story than the one told by looking at the changes in Average Issue Readership over the same period. (Chart 11).

Chart 11

Average Issue Readership: trend from 2013 to 2016 - GB

Title	Apr 2012-Mar 2013: AIR (000)	Apr 2015-Mar 2016: AIR (000)
Daily Mail / dailymail.co.uk	4,245	3,443
Daily Mirror / mirror.co.uk	2,856	1,814
Daily Telegraph / telegraph.co.uk	1,352	1,190
the Guardian / theguardian.com	1,027	809

◗ Apr 2012-Mar 2013: AIR (000) ■ Apr 2015-Mar 2016: AIR (000)
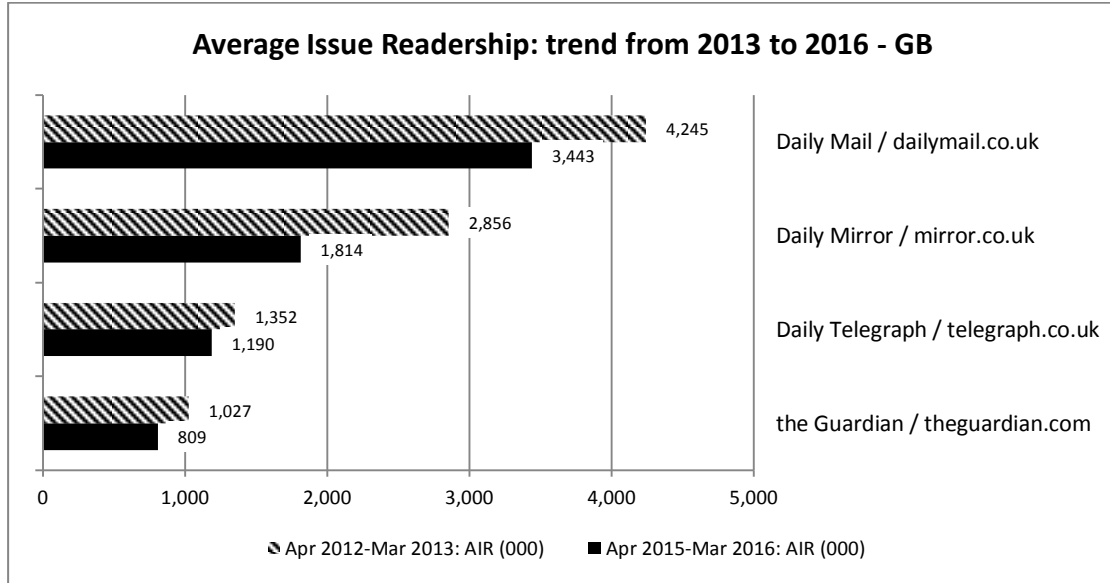
'Key Audience' as an advertising target

The extensive consumer behaviour information also carried in TGI Clickstream studies allows the Key Audience to be characterised in terms of their behaviours. As Table 12 shows, across a range of categories in GB they represent a valuable audience for planners to target and for publishers to monetise. Each of the titles can find stories for brand targeting:

Table 12

'Key Audience' (AIR plus PC) as an advertising target - GB

	elements	total	Daily Mail: Key Audience: AIR + PC (000)	The Guardian: Key Audience: AIR + PC (000)	Daily Telegraph: Key Audience: AIR + PC (000)	Daily Mirror: Key Audience: AIR + PC (000)
Total Sample	(000)	52324	5412	2637	2912	3144
	vert%	100%	100%	100%	100%	100%
	Index	100	100	100	100	100
Family Income £40k+ per annum	(000)	11899	1241	660	802	551
	vert%	22.7%	22.9%	25.0%	27.6%	17.5%
	Index	100	101	110	121	77
Have investments in stocks / shares / unit trusts	(000)	7425	1110	551	789	377
	vert%	14.2%	20.5%	20.9%	27.1%	12.0%
	Index	100	145	147	191	84
Have 2 or more credit cards	(000)	11724	1645	762	943	687
	vert%	22.4%	30.4%	28.9%	32.4%	21.9%
	Index	100	136	129	144	98
Spent over £25 on software in last 12 months	(000)	7147	748	461	539	509
	vert%	13.7%	13.8%	17.5%	18.5%	16.2%
	Index	100	101	128	136	119
Planning to buy a television	(000)	10948	975	568	657	741
	vert%	20.9%	18.0%	21.6%	22.6%	23.6%
	Index	100	86	103	108	113
Shop at Morrisons supermarket	(000)	16143	1828	773	855	1053
	vert%	30.9%	33.8%	29.3%	29.4%	33.5%
	Index	100	109	95	95	109

Equivalent stories can be found for other markets which show the value of the Key Audience for brand targeting. In India the Key Audience for the Times of India, the Hindustan Times and Dainik Bhaskar again represents a valuable audience for planners to target and publishers to monetise. They are more affluent - a larger proportion of the Key Audience has a higher Monthly Household Income, own a credit card and a higher value car, shop online

and travel abroad. When we compare across the various publications we see that the affluence level of the Key Audience is higher for the English dailies. (Table 13).

Table 13

'Key Audience' (AIR plus PC) as an advertising target - India

elements		total	Times of India: Key Audience: AIR + PC (000)	Hindustan Times: Key Audience: AIR + PC (000)	Dainik Bhaskar: Key Audience: AIR + PC (000)
Total Sample	(000)	189940	2567	885	10586
	vert%	100%	100%	100%	100%
	Index	100	100	100	100
Monthly Household Income Rs. 30,000+	(000)	15517	641	327	1465
	vert%	8.2%	25.0%	36.9%	13.8%
	Index	100	305	452	169
Have investmed in Stocks / Mutual Funds	(000)	5689	181	40	438
	vert%	3.0%	7.1%	4.6%	4.1%
	Index	100	235	153	137
Owns Credit Card	(000)	13113	551	101	547
	vert%	6.9%	21.5%	11.4%	5.2%
	Index	100	311	165	75
Own a Rs. 7 lakh + Car	(000)	3173	158	102	354
	vert%	1.7%	6.2%	11.5%	3.3%
	Index	100	369	689	200
Spent Rs. 5000+ in last 6 months on Online Shopping	(000)	2938	86	7	144
	vert%	1.6%	3.3%	0.8%	1.4%
	Index	100	215	51	88
Owns LED or Plasma TV	(000)	25961	501	237	1876
	vert%	13.7%	19.5%	26.8%	17.7%
	Index	100	143	196	130
Oen SmartPhone worth Rs. 15,000+	(000)	4130	191	138	279
	vert%	2.2%	7.4%	15.6%	2.6%
	Index	100	341	719	121
Holiday travel abraod within last 12 months	(000)	8591	153	49	493
	vert%	4.5%	6.0%	4.5%	4.7%
	Index	100	132	99	103

TGI & Clickstream India 2016 Wave 2

A more balanced profile

One of the challenges faced by newsbrands is that, with younger adults likely to seek their news online, the age profiles of their print editions grow older and older. This makes them a useful advertising medium for certain product types, but for others might be considered an objection by planners.

For all the British titles analysed, the age profile of the heaviest 20% of online readers is younger than that of the print edition. Although there is a small overlap, the majority of a newsbrand's heaviest online readers are not print Average Issue Readers. Consequently the age profile of the Key Audience is younger than the AIR age profile. Table 14 illustrates this by reference to the Daily Telegraph. Only 10% of Average Issue Readers are aged under 35, whereas over 55s represent 74% of the print edition AIR. However the age profile of the top 20% of online readers matches closely to the population. This results in the age profile of the Key Audience being better balanced than the AIR for cases in which the Telegraph sales team is pitching for brands seeking an audience less dominated by older adults.

At the same time, the Telegraph's upmarket profile is diluted when comparing the Key Audience to the Average Issue Audience (for example the AB profile is 38% as opposed to 56%). Here however the sales team can still make a case based on absolute numbers: the Key Audience includes 1,296,000 ABs compared to 662,000 ABs among the Average Issue Audience.

Table 14

Profile variations - Daily Telegraph platforms

	elements	total	Daily Telegraph AIR	telegraph.co.uk: Top 20% of visitors via PC (L4W)	Daily Telegraph: Total Key Audience
Total Sample	(000)	51906	1190	2322	3398
	vert%	100%	100%	100%	100%
	Index	100	100	100	100
Age: 15-34	(000)	16388	124	699	821
	vert%	31.6%	10.5%	30.1%	24.2%
	Index	100	33	95	76
Age: 35-54	(000)	16983	185	750	923
	vert%	32.7%	15.6%	32.3%	27.2%
	Index	100	48	99	83
Age: 55+	(000)	18534	881	872	1655
	vert%	35.7%	74.0%	37.6%	48.7%
	Index	100	207	105	136
Social Grade: AB	(000)	13923	662	696	1296
	vert%	26.8%	55.6%	30.0%	38.1%
	Index	100	207	112	142
Social Grade: C1	(000)	14188	350	580	895
	vert%	27.3%	29.4%	25.0%	26.3%
	Index	100	108	91	96
Social Grade: C2	(000)	10906	87.5	439	518
	vert%	21.0%	7.35%	18.9%	15.2%
	Index	100	35	90	73
Social Grade: DE	(000)	12889	91.1	606	690
	vert%	24.8%	7.65%	26.1%	20.3%
	Index	100	31	105	82

Source: GB TGI Clickstream 2016 Q3 (April 2015 - March 2016)

It is here that we see another difference between India and the other markets. In India the physical newspaper reading habit is still strong amongst the younger audiences, such as those aged 15-24 years. As Table 15 shows, the print AIRs for Times of India, Hindustan Times and Dainik Bhaskar are skewed slightly towards younger adults. The heaviest 20% of online readers are more likely to be aged 25-44.

With respect to SEC, it is very clear that the profile of English daily readers is upper SEC, be it for the physical paper or the online version. The dominance of reading as an SEC A phenomenon declines as one moves from English to Hindi and the regional publications. This could be due to the comfort with reading in the vernacular language (English language salience decreases as one moves down the SEC spectrum).

The profile of Dainik Bhaskar's online readers seems more affluent when compared to the physical copy, and this is also true for the other Hindi and regional titles. However the number of online readers is much smaller as compared to number of physical copy readers.

Table 15

Profile Variations – Indian Newspaper platforms

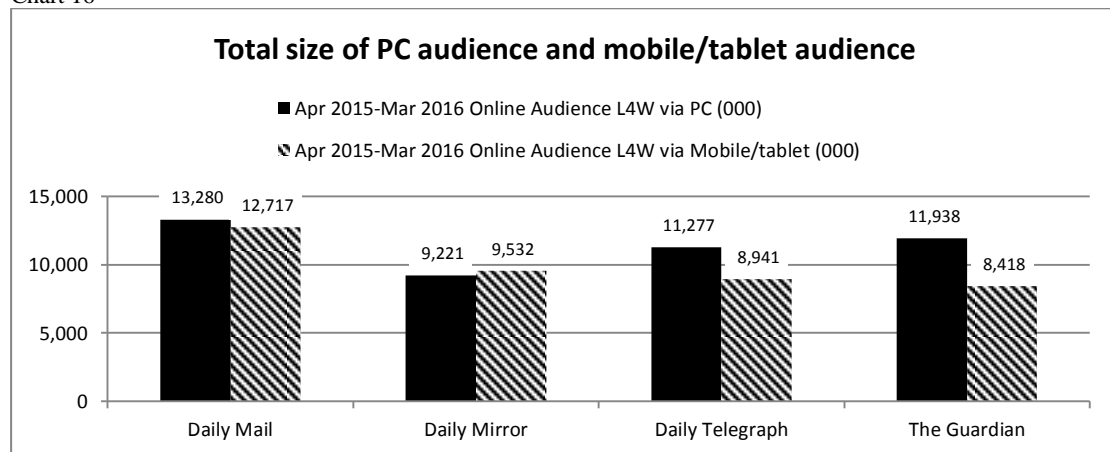|	elements	total	Times Of India			Hindustan Times			Dainik Bhaskar		
			Times Of India AIR	Top 20 percent time spent TOI PC	TOI (AIR + Top 20% time)	Hindustan Times AIR	Top 20 percent time spent HT pc	Hindustan Times (AIR + Top 20% time)	Dainik Bhaskar AIR	Top 20 percent time spent bhaskar pc	Dainik Bhaskar (AIR + Top 20% time)
Total Sample	(pop)	189939995	1992698	595221	2566962	746958	146252	884944	10310494	315200	10585782
	vert%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Index	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Age 15 - 24	(pop)	58005741	757013	150321	886377	253539	24832	278371	3510240	40778	3543432
	vert%	30.5%	38.0%	25.3%	34.5%	33.9%	17.0%	31.5%	34.0%	12.9%	33.5%
	Index	100	124	83	113	111	56	103	111	42	110
Age 25 - 44	(pop)	94024158	949696	332826	1282522	354640	105830	452203	4715389	214878	4901605
	vert%	49.5%	47.7%	55.9%	50.0%	47.5%	72.4%	51.1%	45.7%	68.2%	46.3%
	Index	100	96	113	101	96	146	103	92	138	94
Age 45 - 55	(pop)	37910101	285989	112074	398063	138780	15590	154370	2084865	59545	2140746
	vert%	20.0%	14.4%	18.8%	15.5%	18.6%	10.7%	17.4%	20.2%	18.9%	20.2%
	Index	100	72	94	78	93	53	87	101	95	101
New SEC A	(pop)	57435681	1397552	371099	1755510	595124	124146	711004	4591869	182988	4742531
	vert%	30.2%	70.1%	62.3%	68.4%	79.7%	84.9%	80.3%	44.5%	58.1%	44.8%
	Index	100	232	206	226	263	281	266	147	192	148
New SEC B	(pop)	62258291	449392	178763	620338	113597	20408	134005	3063367	103045	3158826
	vert%	32.8%	22.6%	30.0%	24.2%	15.2%	14.0%	15.1%	29.7%	32.7%	29.8%
	Index	100	69	92	74	46	43	46	91	100	91
New SEC C	(pop)	70246028	145755	45359	191114	38237	1698	39935	2655258	29167	2684425
	vert%	37.0%	7.31%	7.62%	7.45%	5.12%	1.16%	4.51%	25.8%	9.25%	25.4%
	Index	100	20	21	20	14	3	12	70	25	69

Source: TGI & Clickstream India 2016 Wave 2

Expanding the 'Key Audience' to mobile reading

In some markets TGI Clickstream data also now includes mobile measurement – that is, visits to sites via mobile phone or tablet.

For the four newsbrands under investigation in GB, the site audience from mobiles and tablets is close in size to the audience from PCs. Indeed, for mirror.co.uk the mobile/tablet audience has overhauled the PC-based audience. (Chart 16).

Chart 16

Total size of PC audience and mobile/tablet audience

■ Apr 2015-Mar 2016 Online Audience L4W via PC (000)
◩ Apr 2015-Mar 2016 Online Audience L4W via Mobile/tablet (000)

	Daily Mail	Daily Mirror	Daily Telegraph	The Guardian
PC	13,280	9,221	11,277	11,938
Mobile/tablet	12,717	9,532	8,941	8,418

Source: GB TGI Clickstream 2016 Q3 (April 2015-March 2016)

Deeper analysis of the GB Clickstream data shows similar behaviour patterns for mobile to those or PC-based access to the newsbrand sites. For example, the average metrics show the strong performance of Mail Online to be replicated for mobile/tablet access. It achieves around twice as many visits, page views and time on site as theguardian.com, which is the next best performer for mobile reading just as it is for PC-based reading. (Table 17).

Table 17

Average metrics for online edition via mobile or tablet: last 4 weeks

	Mail Online	theguardian.com	telegraph.co.uk	mirror.co.uk
Average Number of Visits (L4W) MOB	8.6	4.5	4.3	4.2
Average Page Views (L4W) MOB	34.2	15.9	12.4	8.6
Average Time on Site - minutes (L4W) MOB	42.3	19.9	10.8	14.6
Average Time per visit - minutes (L4W) MOB	3.8	3.0	2.1	3.4

So we can feel confident that the broad patterns of behaviour for reading via tablet and mobile are similar to those for PC-based reading. We can assume that, as for PC-based access, the heaviest 20% of the mobile/tablet audience are those most committed to the site, and those most likely to be exposed to advertising carried within it.

The 'Key Multiple Device Audience'

This allows us to take our definition of 'Key Audience' further, and include also the heaviest 20% of the mobile audience within it. Let's call this the 'Key Multiple Device Audience'

Table 18 sets out the sizes of the top 20% of the mobile/tablet audience for the four GB newsbrands, and shows the size of the Key Multiple Device Audience in the latest GB TGI Clickstream database:

Table 18

'Key Multiple Device Audience' and its components - GB

	Print AIR (000)	Heaviest 20% Online - PC (000)	Heaviest 20% Online - Mobile/tablet (000)	Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)
Daily Mail	3,294	2,648	2,133	6,947
Daily Mirror	1,774	1,844	1,854	4,634
Daily Telegraph	1,139	2,255	1,699	4,213
The Guardian	828	2,238	1,668	3,975

The Key Multiple Device Audience can also be regarded as an advertising target. For any newsbrand it can be characterised by its behaviours. Table 19 illustrates a selection of behaviours across categories for which one or more of the four GB newsbrands represents a valuable targeting option. Again we can identify brands or behaviours around which each of the newsbrands can tell an advertising story:

Table 19

'Key Multiple Device Audience' (AIR plus PC plus Mobile/tablet) as an advertising target - GB

	elements	total	Daily Mail: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	The Guardian: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Daily Telegraph: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Daily Mirror: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)
Total Sample	(000)	52324	6947	3975	4213	4634
	vert%	100%	100%	100%	100%	100%
	Index	100.00	100.00	100.00	100.00	100.00
Family Income £40k+ per annum	(000)	11899	1670	1148	1183	914
	vert%	22.7%	24.0%	28.9%	28.1%	19.7%
	Index	100	106	127	123	87
Have investments in stocks / shares / unit trusts	(000)	7425	1312	694	983	536
	vert%	14.2%	18.9%	17.5%	23.3%	11.6%
	Index	100	133	123	164	81
Deal in shares online	(000)	2063	254	169	256	170
	vert%	3.94%	3.65%	4.24%	6.08%	3.67%
	Index	100	93	108	154	93
Have 2 or more credit cards	(000)	11724	2002	1082	1295	1065
	vert%	22.4%	28.8%	27.2%	30.7%	23.0%
	Index	100	129	121	137	103
Bet on Horse Racing	(000)	6436	916	538	530	729
	vert%	12.3%	13.2%	13.5%	12.6%	15.7%
	Index	100	107	110	102	128
Receive Sky Sports	(000)	10260	1531	794	928	1127
	vert%	19.6%	22.0%	20.0%	22.0%	24.3%
	Index	100	112	102	112	124
Receive Sky Cinema	(000)	9037	1325	671	779	1002
	vert%	17.3%	19.1%	16.9%	18.5%	21.6%
	Index	100	110	98	107	125
Shop at Waitrose	(000)	8288	1383	879	1012	639
	vert%	15.8%	19.9%	22.1%	24.0%	13.8%
	Index	100	126	140	152	87
Shop at Iceland	(000)	11092	1541	786	865	1203
	vert%	21.2%	22.2%	19.8%	20.5%	26.0%
	Index	100	105	93	97	122
Spent over £25 on software	(000)	7147	941	663	738	743
	vert%	13.7%	13.5%	16.7%	17.5%	16.0%
	Index	100	99	122	128	117

GB TGI Clickstream 2017 Q2 (January - December 2016)

Furthering the story for newsbrands, it's possible to characterise the Key Multiple Device Audience for each in terms of attitudes held. For example, Table 20 ranks by index the top 10 attitudes held by the Key Multiple Device Audience of the Guardian. The liberal attitudes for which the Guardian audience is known are clearly illustrated.

Table 20

Top 10 attitudes ranked by index: 'Key Multiple Device Audience' - the Guardian

	All Adults (%)	The Guardian: Key Multiple Device Audience	Index
Definitely Agree:			
I am interested in the arts	14.4%	22.6%	156
I am interested in other cultures	14.3%	22.1%	154
I buy Fair Trade products when available	6.3%	9.0%	143
I like to have control over people and resources	3.5%	4.9%	141
I like to pursue a life of novelty and change	7.2%	10.2%	141
I am interested in international events	15.2%	21.2%	139
It is important my household is equipped with the latest technology	5.2%	7.3%	139
I would be prepared to pay more for environmentally friendly products	5.2%	7.2%	137
I want to get to the very top in my career	9.1%	12.4%	136
I try to keep up with developments in technology	10.1%	13.7%	135

Source: GB TGI Clickstream 2017 Q2 (January - December 2016)

Table 21 sets out a ranking of brand and behavioural variables evidenced again by the Key Multiple Device Audience of the Guardian. This kind of analysis can serve as a very useful 'hit list' hit list for ad sales team.

Table 21

10 brand targets ranked by index: 'Key Multiple Device Audience' - the Guardian

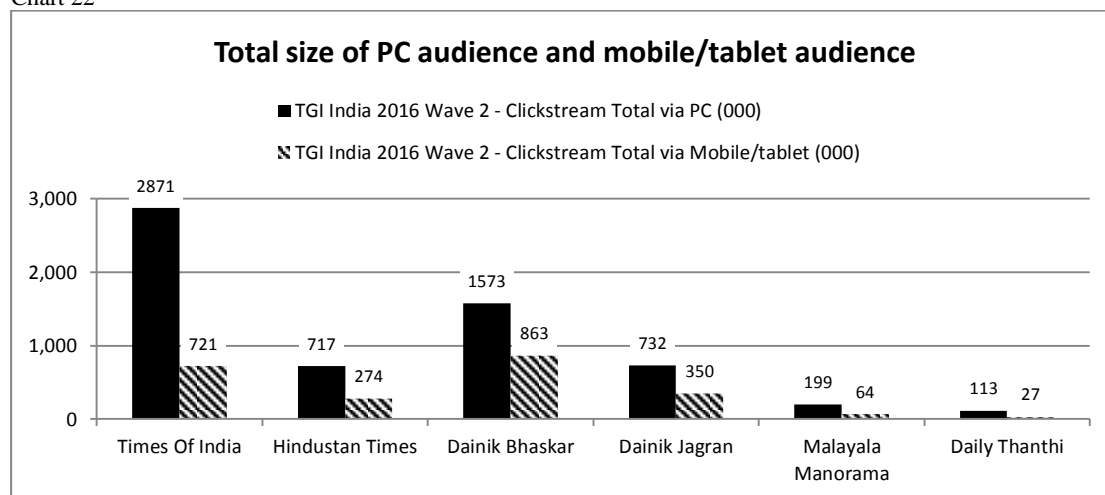| Brand / category	All Adults (%)	The Guardian: Key Multiple Device Audience	Index
Holland & Barrett / nuts, seeds and dried fruit (most often use)	3.7%	6.6%	180
Italy / visited on holiday	3.7%	6.5%	176
Fever-Tree / mixers for alcoholic drinks (use)	3.0%	5.2%	176
San Pellegrino / fizzy soft drinks (use)	4.7%	8.3%	175
Argentinian / wine varieties	3.3%	5.7%	172
John Lewis / shopping for furniture & furnishings	2.8%	4.8%	169
Ecover / wishing-up detergents	3.2%	5.4%	169
Waitrose / supermarkets for regular main shopping	5.1%	8.3%	163
Fat Face / men's clothing	3.3%	5.4%	162
Tyrells / potato crisps and snacks	4.5%	7.3%	160

So where the TGI Clickstream data exist for mobile/tablet access too, our definition of a combined key audience to both paper and digital formats, which publishers can monetise, can be expanded.

This can be done in India, where the TGI Clickstream data also includes mobile measurement – again, that is visits to sites via mobile phone or tablet.

Chart 22 repeats some of the information from Chart 5, in order to illustrate that the audience from mobiles and tablets for English and Hindi dailies is considerably lower than that through PC for the newspapers under analysis. However, the access through mobile is still significant for the English and Hindi titles, and does add to the entire reader base of the publication.

Chart 22

Total size of PC audience and mobile/tablet audience

- TGI India 2016 Wave 2 - Clickstream Total via PC (000)
- TGI India 2016 Wave 2 - Clickstream Total via Mobile/tablet (000)

	Times Of India	Hindustan Times	Dainik Bhaskar	Dainik Jagran	Malayala Manorama	Daily Thanthi
PC	2871	717	1573	732	199	113
Mobile/tablet	721	274	863	350	64	27

When we add the heaviest 20% who access through mobile/tablet it therefore adds less than the heaviest 20% who access through PC, but once again for the English and Hindi dailies the increment does add at least somewhat to the Key Audiences for these publications. The percentage increment for the Key Multiple Device Audience relative to the AIR is 35% for the Times of India and 26% for the Hindustan Times. (Table 23).

Table 23

'Key Multiple Device Audience' and its components - India

	Print AIR (000)	Heaviest 20% Online - PC (000)	Heaviest 20% Online - Mobile/tablet (000)	Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)
Times of India	1,993	595	145	2,698
Hindustan Times	747	146	55	940
Dainik Bhaskar	10,310	315	173	10,745
Dainik Jagran	8,893	151	73	9,102
Malayala Manorama	6,641	40	15	5,475
Daily Thanthi	4,609	24	6	6,671

Source: TGI & Clickstream India 2016 Wave 2

The audience expansion from this incremental is seen in Table 24, which shows the performance of the Key Multiple Device Audience against the same range of targets as in Table 13.

Admittedly this phenomenon is most significant for now with respect to the English language titles. For the Times of India and the Hindustan Times, the Key Multiple Device Audience represents a valuable audience for planners to target and for publishers to monetise.

For the Hindi titles, their high and growing hard copy readership means that – although their digital audience is sufficiently significant to allow them to propose the Key Multiple Device Audience as an advertising option – their main advertising sales story will probably remain the physical offer for now. However we anticipate that the numbers accessing their digital offerings may well grow quickly, and the demand for multi-platform packages may grow quickly with it.

Table 24

'Key Multiple Device Audience' (AIR plus PC plus Mobile/tablet) as an advertising target - India

	elements	total	Times of India: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Hindustan Times: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Dainik Bhaskar: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Dainik Jagran: Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)
Total Sample	(000)	189940	2698	940	10745	9102
	vert%	100%	100%	100%	100%	100%
	Index	100	100	100	100	100
Monthly Household Income Rs. 30,000+	(000)	15517	665	337	1542	1514
	vert%	8.2%	24.6%	35.9%	14.3%	16.6%
	Index	100	302	439	176	204
Have investmed in Stocks / Mutual Funds	(000)	5689	192	43	436	132
	vert%	3.0%	7.1%	4.6%	4.1%	1.5%
	Index	100	237	153	136	48
Owns Credit Card	(000)	13113	557	102	559	403
	vert%	6.9%	20.6%	10.9%	5.2%	4.4%
	Index	100	299	158	75	64
Own a Rs. 7 lakh + Car	(000)	3173	160	103	355	129
	vert%	1.7%	5.9%	11.0%	3.3%	1.4%
	Index	100	354	659	198	85
Spent Rs. 5000+ in last 6 months on Online Shopping	(000)	2938	87	7	149	11
	vert%	1.6%	3.2%	0.8%	1.4%	0.1%
	Index	100	207	48	89	8
Owns LED or Plasma TV	(000)	25961	516	245	1891	1428
	vert%	13.7%	19.1%	26.1%	17.6%	15.7%
	Index	100	140	191	129	115
Oen SmartPhone worth Rs. 15,000+	(000)	4130	198	138	282	379
	vert%	2.2%	7.3%	14.7%	2.6%	4.2%
	Index	100	337	677	121	192
Holiday travel abraod within last 12 months	(000)	8591	166	42	493	284
	vert%	4.5%	6.2%	4.5%	4.6%	3.1%
	Index	100	136	100	101	69

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Measurement of Apps

It would also be possible to expand our key audience definition further to include reading to the newsbrands via Apps, where our data includes App measurement. GB TGI Clickstream does collect data for reading newsbrands via Apps, and this is published where the sample sizes are sufficiently robust.

For now, App-based reading to only two of the GB newsbrands – the Daily Mail and the Guardian – is judged significant enough for data to be published. Adding the heaviest 20% of App readers into the definition of Key Multiple Device Audience increases the size of it by only 4% for the Daily Mail and 5% for the Guardian. So for now this calculation makes only a relatively small difference to the targeting decisions that would be taken. (Table 25).

Table 25

'Key Multiple Device Audience' plus App Audience - GB

	Key Multiple Device Audience: AIR + PC + Mobile/tablet (000)	Heaviest 20% App reading (000)	Key Multiple Device Audience + Heaviest 20% of App Audience (000)
Daily Mail	6,947	273	7,193
The Guardian	3,975	311	4,181

Source: GB TGI Clickstream 2017 Q2 (January - December 2016)

Conclusion

The audience for newsbrands in their traditional printed format has been in decline in many markets around the world for many years. There are exceptions, and a major one is India, which with its size and rapid social economic growth is seeing significant growth in readership for Hindi and regional language newsbrands.

Many of the newsbrands have large overall audiences for their digital offers, which readers access via a range of devices. In aggregate, many newsbrands thus have contact with more consumers. However, much online contact is transient.

The decline in hard copy reading has had the consequence of declining revenues for publishers from traditional hard-copy advertising formats. This loss of traditional revenue has not been matched by equivalent growth in revenues derived from digital advertising.

Publishers need to be creative. They offer brands a premium audience in a safe environment – which is a powerful benefit in the current age of online uncertainty.

The integration of research measuring traditional print audiences with digital behaviours allows the creation of new target audience concepts such as those proposed in this paper. The 'Key Audience' is the combination of Average Issue Readers and the heaviest 20% of PC-based readers. It represents the readers who are the most engaged with the newsbrand across platforms.

Where the research integration also includes measures of mobile and tablet devices, as at present in the TGI Clickstream studies in GB and India, the 'Key Audience' can be expanded into the 'Key Multiple Device Audience'.

The 'Key Audience' and the 'Key Multiple Device Audience' are demonstrably valuable to newsbrands in permitting them to make the case for advertising campaigns across both print and digital platforms, and thereby monetising their content.

It might have particular value in markets where newsbrands have been hard hit – GB being a good example. The concept also works in other markets – for example France and Germany.

Even in India, where many newsbrands are growing in their hard copy formats, the concept works. The experience for the Times of India and Hindustan Times is quite similar to many Western newsbrands – significant drops in hard copy AIR, but with big digital audiences that in aggregate are now bigger than the print numbers. The Hindi

titles have reasonably sizeable digital audiences, but their hard copy readers have grown so much that digital is still a small (though significant) proportion. For the regional titles, digital at this moment doesn't add much by way of numbers.

Thus the 'Key Audience' and 'Key Multiple Device Audience' concept of aggregating AIR and the heaviest 20% of the online audience makes a lot of sense for the Times of India and Hindustan Times, as a way of compensating for the lost hard copy readers, just as it does for newsbrands elsewhere. For the Hindi and regional titles, the hard copy growth is such that currently they may not have the same requirement. The expanded audience can still work for the Hindi titles, as the online audience adds enough to make a difference, but for the regional titles the uptick is marginal at the moment. The future may be different however.

AIR has been the norm for generations. We believe that the argument in favour of enhanced target audience definitions such as the 'Key Audience' and 'Key Multiple Device Audience' is strong and persuasive. Why not use such concepts as a "new normal"?

The increasing availability of databases that combine measurement of offline reading with passive measurement of online access will make this more and more feasible.

As premium publishers, newsbrands must continue to state and refine their arguments. We hope material such as this will help make their case.

Appendix: Our data sources

GB TGI
A single-source continuous study of consumers' media behaviour, product and brand usage and attitudes, based on a sample of 25,000 nationally representative adults annually.

GB TGI Clickstream
An extension of GB TGI, with the digital behaviours of 4,000 respondents being passively metered. The study has recently been expanded to include mobile and tablet tracking as well as PC-based activity.

TGI France Clickstream
Similar in concept to GB TGI Clickstream, with the passive measurement of the PC-based behaviour of a subset of TGI France respondents being integrated with questionnaire-based information.

TGI Germany Clickstream
A fusion of the media, product and brand, and attitude information collected in TGI Germany with online behavioural information collected by comScore.

Target Group Index – India (TGI – 2007 and TGI 2016 – Wave 2)
A single-source continuous survey which provides valuable consumer insights assisting the understanding of target markets and aiding marketing and advertising decisions. The study covers all SEC ABC consumers aged 15-55 years in Urban India, and captures information on 400 product categories, 4500 brands, media consumption as well as attitudes and psychographic information. It is thus one of the most comprehensive encyclopedias for decoding the Indian consumer.

TGI Clickstream India – (TGI 2016 – Wave 2)
The first ever single source syndicated product of its kind in India that links real time online behaviour with rich profiling information. The study focusses on understanding online audiences beyond their online behaviour amongst SEC ABC 15-55 years urban consumers.

National Readership Survey (NRS) and NRS PADD
The reference study for readership measurement in Great Britain, covering over 250 newsbrands and magazines. NRS PADD was introduced in September 2012 to provide a unique measure of combined print and online audiences, derived from the fusion of NRS print information with comScore MMX data.

References:
The value of engagement among the online news audience – Geoff Wicken and Shen Ying, PDRF, London 2015.