DAILY REACH AND BEYOND

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BACKGROUND
Summary and introduction

With the help of innovative mixed research methods the Swedish newspapers and their websites can now supply the advertising industry with data, which is perceived as being more relevant to today's media landscape.

From a planning perspective newspapers and websites can be planned on a day type level, thus putting newspaper-driven media up for time-based multimedia planning along with other media categories.

From a post evaluation perspective the participating newspaper companies can monitor their audience size on a day-by-day basis and on top of that contact guarantees can be given as a kind of receipt of the media performance during the actual campaign period. Advertising recall and effectiveness studies are also single source connected to the readership survey.

First and foremost this is a paper about an ongoing measurement of newspaper consumption that reports the reading every day, all round the year. But, in general terms, this is also a paper about a package of research services that helps Swedish newspaper companies supply their advertisers with a more complete and up-to-date picture of their performance as communication vehicles. The figure below outlines the full concept.
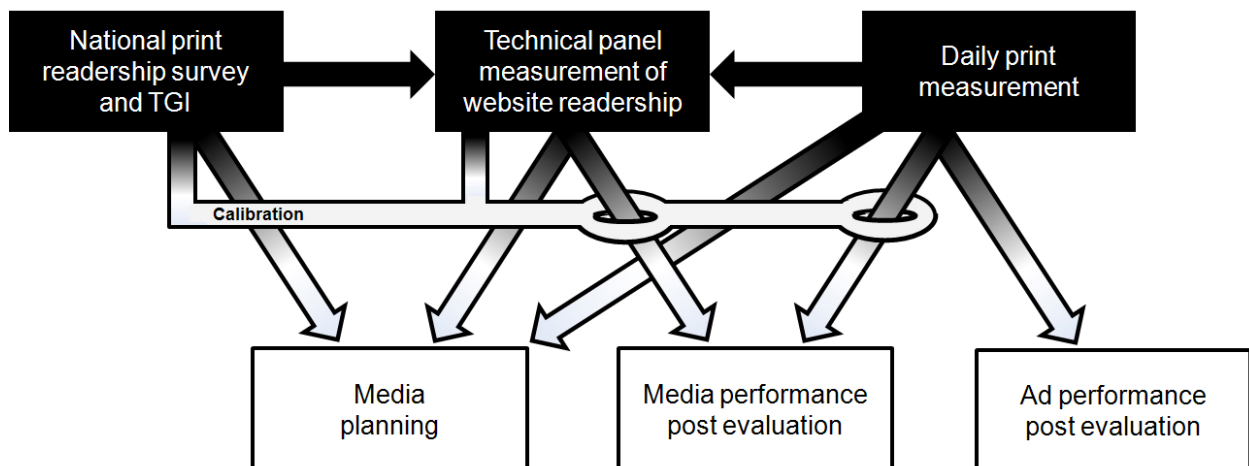
There is also an element of historic chronology to the paper. The whole idea of a daily reach measurement was developed some years ago and presented in a WWRS paper of 2005 called *Daily reach for dailies*. Since then the newspaper market demands are somewhat altered and the measurement itself has undergone changes in almost all of its aspects.

The text will follow the path marked by the five landmarks below:
- Background
- Chronology
- Solution
- Methodology
- Output

Thus the research approaches building up the concept will be described in some detail later on, but before turning to the actual measurements we would like to briefly describe the arena in which they come in play and share some of our views on readership research in general.

BACKGROUND
The mediascape from a print perspective

Ever since the newspaper industry started to count the number of copies and release the statistics to advertisers, the demand has been growing. The demand for what? For just about every aspect of media measurement: more, better, faster. The string is typically first played by the advertiser, who wants the newspaper to prove it was worth spending all that money, but just as

typically it does not cause much music – until the newspapers in turn start losing revenues to other media. That is when it hits the research industry, but at that time the string is often quivering rather than softly ringing the echoes of reasonable advertiser demands.

The measurement market is just that: a story of more, better and faster. (1) *More*, as in larger samples, richer target group data; (2) *better*, as in closer to where ad effects take place: reach data as a complement to circulation figures, ad recall surveys as a complement to reach data and so forth; and (3) *faster*, as in yearly averages turned into quarterly, monthly and even daily.

This paper deals with all these three aspects:

- It is a paper about a measurement of Swedish newspaper consumption that reports the reading every day, all round the year (*faster*).

- It is a paper about the creation of a new large sample survey, because to be able to deliver faster data larger samples are needed (*more*).

- But it is also a paper about the creation of a package of research products that explores the synergies evolving when combining different methodologies and data sources. In order to really make music out of the exciting but also sometimes disharmonious requests from the Swedish media market, the daily measurement is intertwined with a range of other services, such as the national circulation audit, the national readership survey and TGI, campaign receipts and single source ad recall studies (*better*).

At the heart of the concept lies the daily readership survey. That in itself holds lots of methodologically interesting considerations and we will get back to many of them, but in order to fully understand it, the bigger picture is needed. And of course, it all takes place in a market with its own logic and characteristics. Therefore let us briefly discuss the Swedish Newspaper scene.

The Swedish media market is in some ways different from many of its European counterparts. Traditionally Sweden (as well as the rest of the Nordic countries) has been a stronghold for newspapers and in later years also for free sheet newspapers. 68 per cent of the Swedes read a subscribed newspaper on an average day. 22 per cent reads a free sheet newspaper and 27 per cent reads an evening tabloid. At the same time the Internet penetration on a monthly basis is as high as 82 per cent.

As a percentage of the distribution of advertising expenditure Swedish newspapers achieve an astonishing 52 per cent of the total (Newspapers, internet, TV, radio, magazines, cinema, outdoor). See *WARC European Marketing Handbook 2006*.

The corresponding figure for the big five in Europe (UK, GER, ITA, FRA, SPA) is only 31 per cent. At the same time the Internet advertising expenditure in Sweden holds the top position in Europe with a seven per cent share of all advertising.

Consequently, newspapers in Sweden are in a strong position but have what could be described as "everything to lose".

And indeed, in a slow but steady Europeanization of audience patterns, the Swedish newspaper industry has suffered declining circulation with declining reach and a corresponding loss of advertising revenue. The industry has slowly been squeezed between, on the one hand, new technology such as the Internet and, on the other, more traditional media claiming its fair slice of the newspapers' traditionally very high share of the advertising budgets. The newspapers answer has been to launch, in many cases very successful, online editions.
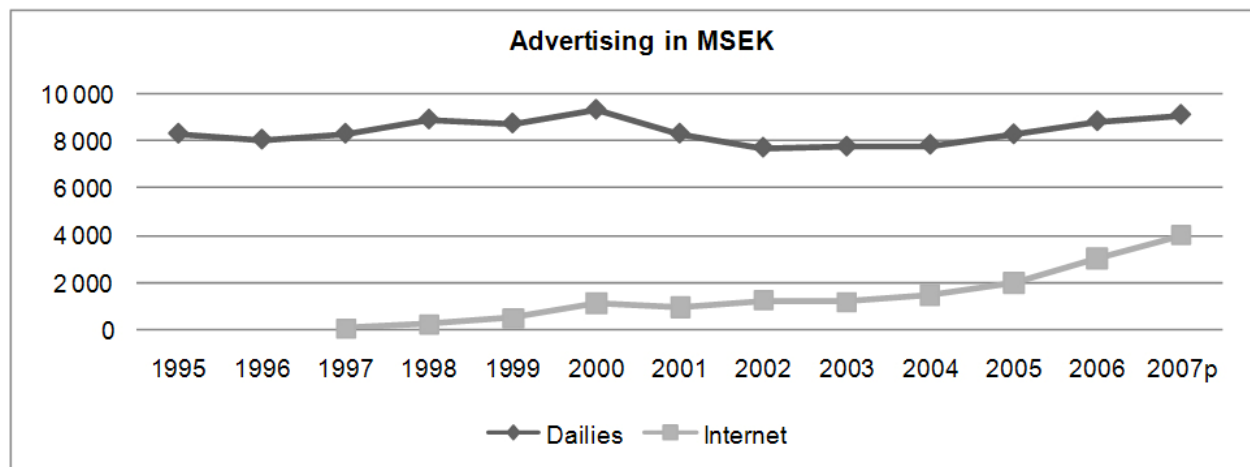
Qualitative research conducted amongst planners and media agency staff in Sweden has clearly shown print media's perceived inability to prove their value is a hot issue. As part of the same qualitative research the respondents got to choose from a number of pictures to decide which best described the different media categories.

The result from this exercise – *the Core Value model* – was quite shocking for the newspapers. The pictures most often used to describe the newspapers were two not entirely beautiful pictures of factories with underlying explanatory keywords such as repulsion, aggression, difficulties, depression etc.
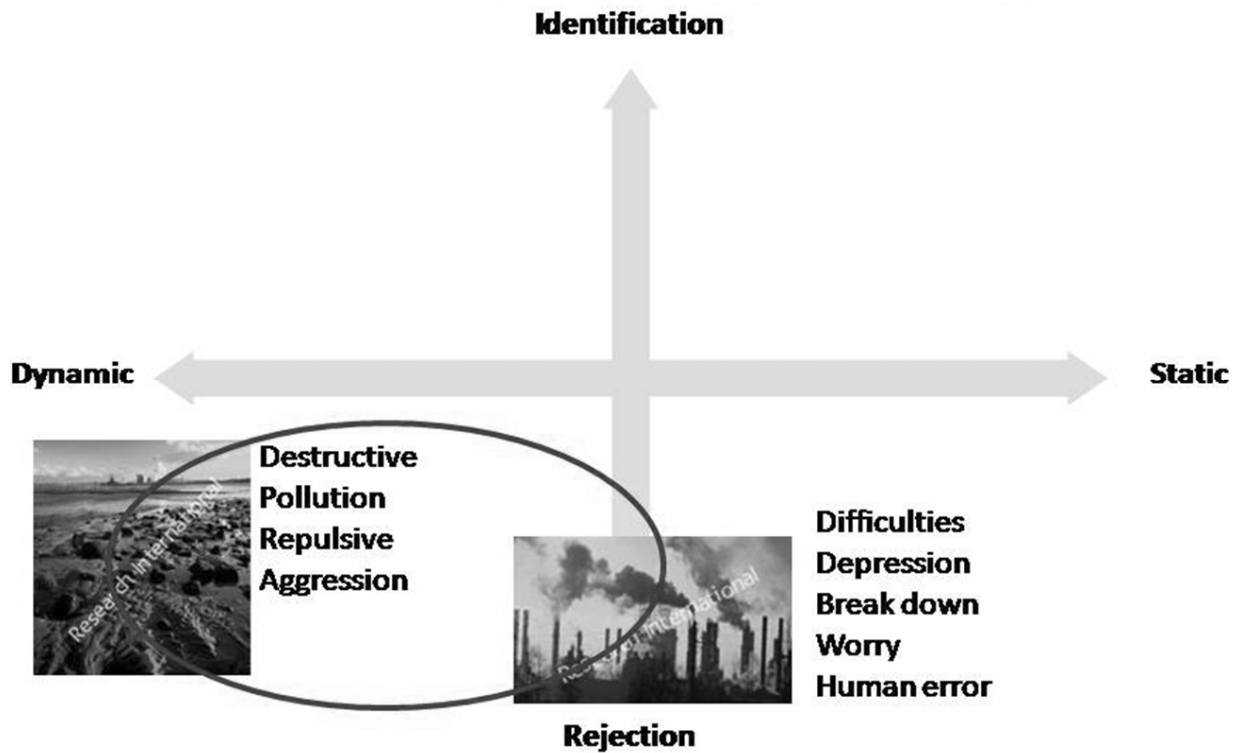
The analysis of the result indicated that the reason for this not very flattering result was at least threefold.

- Firstly the media is perceived as logistically challenging for a media planner. The multitude of local newspapers with different formats and distribution schemes puts significant pressure on the planner to keep track on all materials, deadlines etc.

- Secondly the media is perceived as being dynamic, but not necessarily in a positive way. The media is seen as changing very fast – in terms of technology for example – in directions that are hard to foresee.

- Thirdly and most important, digital media and even broadcast media are thought of as being more accountable and on top of that the knowledge among planners about print's different possibilities of showing its advertising effectiveness is at a very low level.

The whole situation could probably have been accepted as disadvantages inherent with the medium *if* the medium had a minor role in most media schedules, but in a country where more than 50 per cent of the advertising is newspaper advertising, the necessity for print media owners to prove their value simply cannot be underestimated. Media planners, quite rightfully one might argue, cannot accept pouring half of their advertising budgets down a black hole, with no feed-back on the outcome.

Summing up we conclude that the story of the Swedish newspaper market is so far a success story, but also one in need of quite radical change. The newspaper market is slowly sliding downwards, image-wise and in terms of relative share of advertising budgets. There are many factors involved of course, but better support from relevant research is at least one important area where improvements can be made.

BACKGROUND
Our view on media currency research

In our opinion all research that aims to understand media behavior needs to be centered around the consumer. The usage of different media should be looked upon from a holistic perspective where not only media use but all other activities are put into context – partly because that is what is needed to understand the media categories' total role in the consumers' everyday life, but partly because that is the only way of identifying the synergies that might occur when combining different media.

It is a natural tendency of any media type to strive for a survey solution of its own; one that is optimized to handle the specific needs of the media category. The disadvantage of such ambition is that comparability with other media often gets lost, along with multimedia planning possibilities.

This is why we strongly believe in a holistic approach. On its own a reach survey is only a reach survey and a campaign measurement is, in the same manner, only a campaign measurement. But if we put them together in the same model the value of the research suddenly equals more than just the sum of its ingredients. That way we lay out an environment in which advertisers can feel more secure in their media investments.

Another very important aspect of media research is to know what kind of data is needed in what situation. To our experience a survey which is designed to give users the best possible opportunities to plan a future campaign, is often not very useful when it comes to evaluating the performance of media vehicles (or ads themselves) in a past campaign.


When we look *forward* (media planning) we need to use historical data, which are not sensitive to peaks or dips – caused by special (news) events – that are more or less unpredictable anyway. Thus we need stable average data. In planning we also need cross media comparability and a vast set of target groups in order to make sure we catch the right people at the right time in their communication channels of choice. This fact is further stressed by the increasing importance of the internet to those companies using the print medium.

But when we look *backwards* upon a campaign (post evaluate), we need the "real" results from the days on which the advertising occurred. Average data just won't cut it. However, the results do not need to be contrasted in a multi media setting and the need for richness of target groups is not as strong.

To maintain the strong investments in print, the print media houses need to offer good planning opportunities with access to rich target group data and multimedia service on stable readership data. But, quite evidently, the advertisers are putting more and more pressure on the media houses to also offer research data on which they can draw conclusions, post their investments, about whether they got the desired delivery.

To cut a long story short research agencies operating in the field of media research need to run different lines of data collection and reporting to fully cover the demands of the advertising market. If we take the classic ARF model as a starting point we can easily see where the different kind of media research connects with the ARF model. No advertiser taking his task seriously will be satisfied with research data in only in one step of the ARF model. Please note that the scales and placement of the research categories are approximate; simply meant to give a general idea.
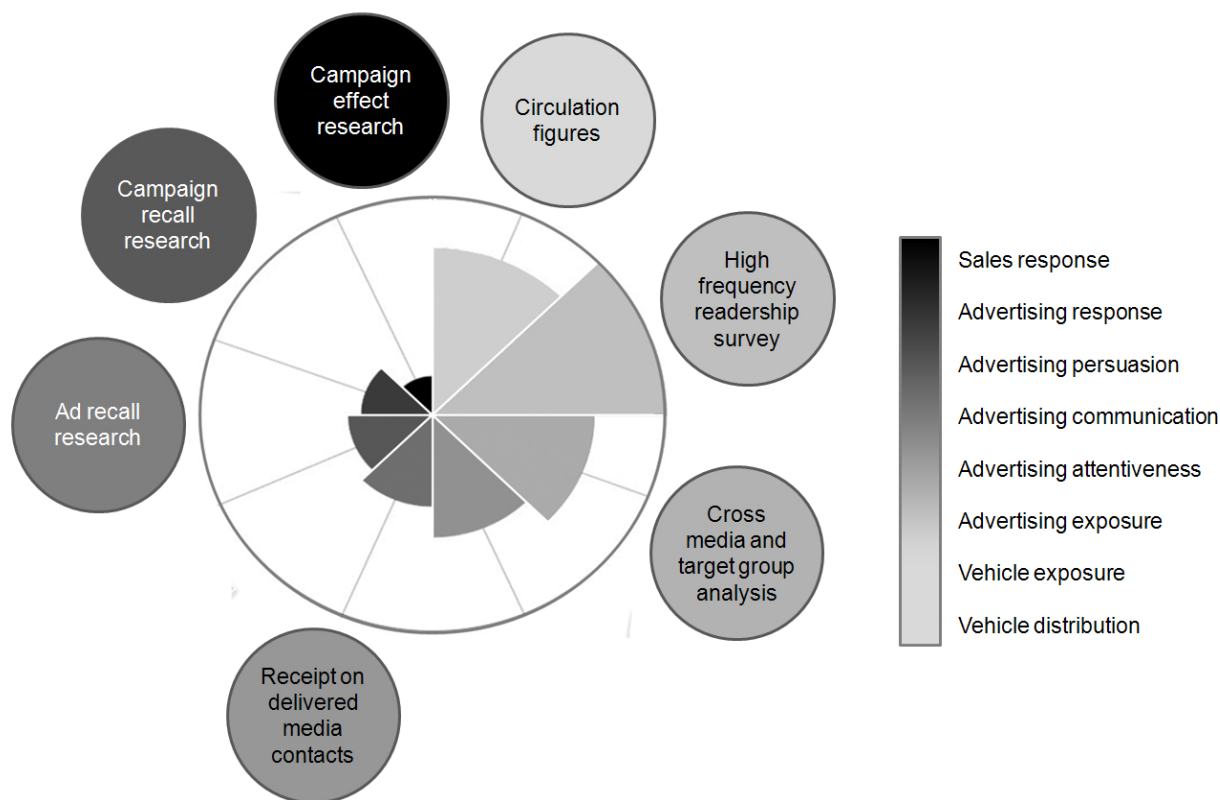
At the core of the media research business lays the planning currency measurement. In this world of media fragmentation and individualization advertisers are facing more and more difficulties coming to touch with relevant consumers when and where they want to be reached. Therefore it is more important than ever that the planning currencies hold cross media data and a variety of target group information. The tendency of traditional publicists going multi channel (print, online etc.) leads to the same conclusion. But given the increasing demand for proper estimations on actual return on investment, the planning currency needs to be accompanied by post evaluation data – on media performance on the days of the campaign but also based on the specific campaign material in itself. And all of this needs to be done without losing the consumer centric holistic perspective. From a research perspective keeping the holistic ambition means connecting the steps in the model and it goes without saying that such connections also paves the way for cost efficiency.

CHRONOLOGY
Initial market demands and the solution presented in 2004

Though the previously mentioned qualitative research findings are fresh, the aversion to the newspaper industry held by planners that the findings helped to identify, did not occur all of a sudden. As pointed out early, advertisers have been expecting more, better and faster since the birth of measurements and in 2004 the pressure on the newspapers had grown to a level where they felt they had to act.

The initial demand from the advertisement market was that it wanted the newspaper industry to provide faster delivery of readership figures and also a receipt on the number of individuals reached by the newspaper on the specific day (or combination of days) on which the ads were placed.

The newspapers were losing ad revenues to other media and picked up on the demand. In the discussions held back then between the research agency and newspaper representatives the latter specifically pointed out they wanted the requested data to be more in line with the kind of information that the digital media could provide. At this point we came up with a solution that answered fairly well to the markets demand for:

1. Faster delivery of readership data
2. A receipt on the number of delivered newspaper contacts
3. Delivery and measurement on a daily basis

The solution as it was presented to the market by the research agency could be described as a three-step model. The model is only summarized here and is thoroughly described in the WWRS paper of 2005 – *Daily reach for dailies*.

Firstly the issue concerning the need for faster delivery of readership data and measurement on a daily basis was tackled. The two surveys that were used at the time were the following:

- The Swedish NRS *Orvesto Consumer* – a self completion postal questionnaire with approximately 50 000 annual respondents. The survey which apart from print data, also covers TV, radio, internet, cinema and DM has also a full range of TGI questions and is being reported three times a year

- As a complementary study a day-after-recall survey (DAR) – *MediePuls* was performed. The survey covers the readership of dailies and back in 2004 it was conducted in a CATI operation. The data collection had been going on 350 days per year since 1995 with 112 interviews a day. *MediePuls* was then reported each week of the year with the latest three-week average totals, and each month with the latest two-month average totals.

The whole point of the *MediePuls* survey was to produce faster data than the NRS. However, up until 2004 it had been a standalone survey with no connection to *Orvesto Consumer,* the "official" NRS and planning currency. This was perceived as a problem by the clients and the decision was taken to calibrate the Day-after recall figures to the NRS levels.
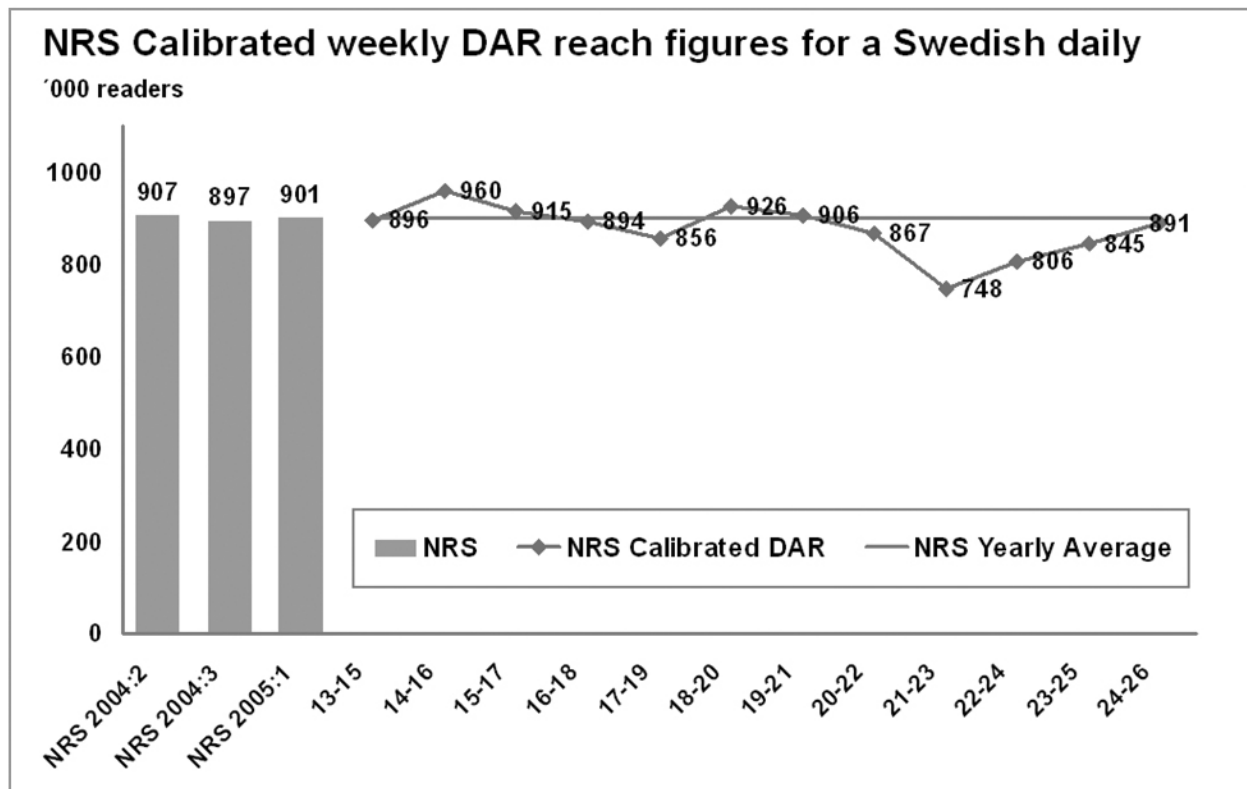
The calibration method, that still remains, is a pretty straightforward exercise. For each print title the numeric relation between the audience from one year of DAR data and NRS data from the same period is calculated. The derived factor for each daily is then used to calibrate the new weekly data. This means that a time series over the year is derived, which the planner can use in planning, evaluation and forecasting.

The first step meant that buyers, sellers and planners had access to new data every week – data that was calibrated in a way that allowed them to use it as an extension in time of the planning currency.

Secondly the monthly DAR reports included data for the reading on separate weekdays and since there are some noteworthy systematic differences in the reach figures for the different dailies depending on the day of the week, a decision was taken to calibrate the week day type figures to the NRS average issue reach figure.

The second step meant that buyers, sellers and planners had access to day type data in *Sesame*, the planning software used by most of the Swedish media market. Since the survey also is connected to a technical panel measurement of internet use, one consequence was that real multimedia time based planning could be done for the media houses.

Thirdly we needed to solve the problem with the newspapers' wish to produce a receipt on the number of delivered contacts in a campaign. After initial experiments a decision was then taken not to pursue an approach based only on claimed behavior from survey interviews.

Since the Swedish newspaper market is extremely local it would at that time, quite frankly, have been too expensive to cover any substantial amount of the local dailies. An SMS panel concept was also rejected due to limitations in the platform and fears of misrepresentation in the panel. Since it would be an absolute necessity to have a rolling panel and not use the same panel day after day (which the methodological committee considered dubious). These methodological problems basically made the SMS path too costly an option to carry out. Viewing the economically possible the sample sizes we would have had the somewhat tragicomic disadvantage that the true daily variations in the readership of dailies would, in many cases, probably be lesser than the margin of error.

A completely new approach combining circulation and readership data was therefore launched. For every title and day type a readers-per-copy value (RPC) was calculated using averages from three weeks data. Then, anew internet based planning software was launched where one could choose a campaign with different dates. For each date the day type RPC value was multiplied with the actual daily circulation outcome, as audited by the ABC, and in that way the number of contacts was calculated.

The third step meant that newspapers and groups of newspapers could estimate and communicate the number of contacts they had delivered to advertisers without having to worry about confidence intervals. Some of the more market driven newspapers created contact guarantees where they guaranteed a certain amount of contacts and compensated the advertiser if the guarantee did not hold.

Market reaction, changing demands and learning's for concept development

Well, we live and we learn. Most of the concept described above is still in fruitful operation, but there have been essential changes in three areas: the data collection of the DAR-figures; the output to the clients, and the way the daily reach figures are fitted into a broader package of research services.

As anyone involved in the media measurement business know, fulfilling what appears to be a strong demand does not automatically lead to success. Some of the voices might have been louder than their actual willingness to pay for anything, but more importantly, even good research might complicate more than it clarifies. New data may better reflect the media landscape but further complicate an already complicated planning situation.

Generally speaking, the two last steps in the model – the receipt on delivered contacts and the day type data – was very well received. The first step however, which was the access given to planners to weekly data, sounded good but when put to the test it did not quite make it into the everyday media planning. The routines of the media agencies then did not seem to support faster delivery of readership data. In passing it might be mentioned that as of today eight of the leading media agencies have in fact invested in version two of the daily survey and, judging from their response, having to adjust to more frequent data releases has been well worth the effort.

In retrospect, another way to put it would be to say the concept was successful with some of the newspapers but did not initially catch as much attention as expected by the planners. Even though the RPC-based calculation of campaign contacts was opened up for planners, for obvious reasons the data remained in the control of the newspapers. Those of the newspaper groups who signed up for the measurement found themselves turning up business thanks to the ability of providing campaign receipts, but far from all of them did sign up, the planners situation did not change and consequently as an industry the newspapers were still stuck in the repulsion/aggression/difficulties/depression end of the value map when the qualitative survey was conducted on the people whose job it is to decide where to spend advertisers money.

During the first years of the measurement a rather radical thing also happened in the media market itself. From being a dailies' advertising market divided between subscribed morning papers and evening tabloids, with Metro as the only real free sheet exception at least outside of Stockholm, Sweden more or less overnight turned into a country with a pretty powerful free sheet segment. New titles hit the market and old ones expanded to new regions.

So, what about it? Well, it is just that the perhaps best functioning component of the concept was the RPC-based campaign receipts and as mentioned they rested on access to ABC circulation figures. The free sheets are not subscribed, nor sold and consequently they lack comparable circulation figures.

When summarizing our experiences from the initial years of the concept we concluded a lot had been achieved but a lot of problems remained to be cracked. And when laying them out in front of us, we realized solving them was all pretty much a question of sample size

In order to provide the free sheets (some of them corporate sisters with traditional dailies among the concept's clients) reliable data without the stabilizing RPC factor, we needed to drastically enlarge the sample sizes. And that would also improve the measurement from something that could be delivered weekly to planners with rolling averages of the recent weeks, to something that could be delivered more or less daily and as it was, without the averaging – potentially opening the door to a kind of proper post evaluation previously never available for print media.

Another aspect of the whole media measurement circus that had begun to surface more and more often in client meetings about the concept was the ever-growing need for ad recall surveys. There are circulation figures, people said, and reach figures. And yes, the reach levels are updated more often. There is even an opportunity that seems to have gained acceptance in the market space to calculate the number of delivered campaign contacts.

But all of that is about the reading of the paper, the title. What we need is client specific data that focuses on the individual advertiser. "That's what you get on the internet, that's what you get from TV!"

Whether it is the responsibility of the media carrying the advertising to provide that kind of data could be discussed but the demand is there and from a research perspective it takes us to the same conclusion – it is of course a sample size issue. It takes a lot of respondents to be able to say something about the readers of a local free sheet on a single day. It takes even more of them if you want to research those of them who noticed the ad on page 17.

All in all we needed a way to enlarge the sample size without skyrocketing costs and we needed to do it in a fashion that allowed for standardized ad recall surveys in which the ads themselves could be displayed to the respondents. By now the answer is evident: The CATI-based DAR-survey was dropped in favor of an automated data collection based on Research Internationals large and randomly recruited internet panel.

SOLUTION
A new solution for a new world

None of this happened at the flick of a switch of course. There were methodological issues such as how representative the panel could be and panel effects – the CATI and the CAWI ran in parallel for a long time. The overall patterns where more or less identical even though the absolute levels in the web interviews were on average 15 per cent higher than the CATI interviews. Generally speaking the more urban titles got relatively higher reach figures using CAWI than in the CATI interview. But since the CAWI interviews were calibrated to the more stable NRS level the absolute levels were not a hot topic as long as the overall patterns were consistent with prior research.

There were financial concerns too. A panel measurement of that size would be so costly that it would take success with both the reach measurement and the ad recall surveys to make it worthwhile. Naturally there were all kinds of internal matters such as management and organization, but more than anything there were questions about how to fit the pieces together. The model below – meant to somewhat resemble a target face – gives an outline of how we finally came to look upon it.
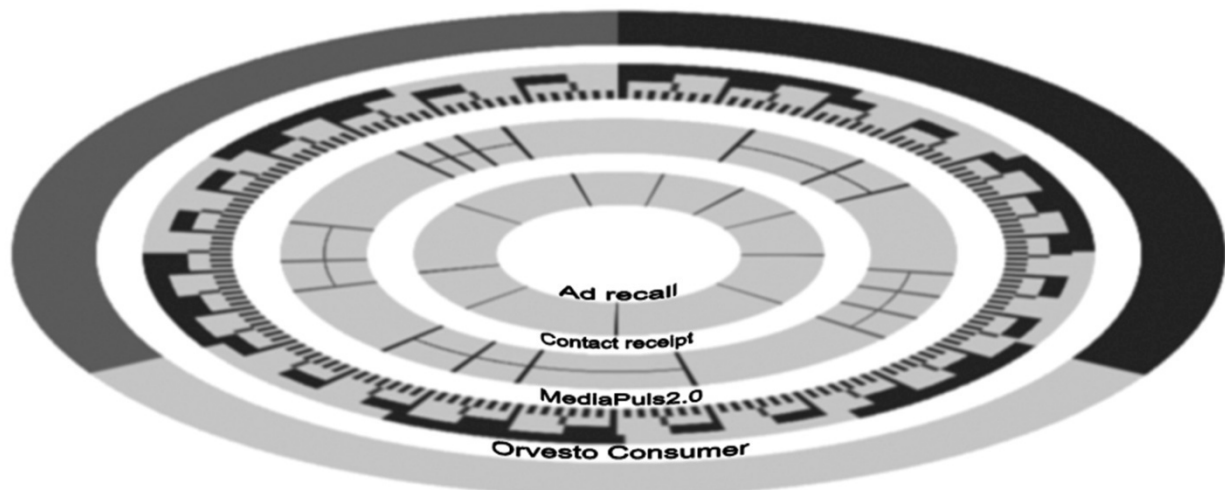
Orvesto Consumer	MediePuls2.0	Contact receipt	Ad and campaign recall
• Postal NRS and TGI	• Daily CAWI data collection	• Gives the number of media contacts throughout a campaign	• Single source with MediePuls2.0
• 50 000 yearly respondents	• More than 1 million responses/year	• Based on MediaPuls2.0 and optionally on ABC-based RPC figures	• Gives ad and campaign reach
• Data is released 3 times/year	• Holds daily, weekly and monthly data		• Gives key campaign attitudes

The first ring – *Orvesto Consumer*
The outer circle is the NRS: *Orvesto Consumer*. It is conducted three times per year in a postal survey. It holds a full set of TGI data and is the basis for print and media (dailies and magazines) planning. It also holds reach data for direct marketing and cinema. *Orvesto Consumer* is made accessible to the Swedish media market via the planning and analysis software *Sesame* and in *Sesame* there is also panel currency data for Internet, single source with the *Orvesto Consumer*.

In addition to that both the television and the radio currency data have been calibrated with the *Orvesto consumer* database. In other words: *Orvesto Consumer* and *Sesame* contains all that is needed for proper cross media planning, on the trade currency

level, in detailed target groups. The radio, television and internet data is time-based in itself. Empowered with the daily variations from the rolling panel-based print readership survey the package allows for sophisticated planning of any audience sub group, across all media categories and in very granular timeslots.

In the near future *Orvesto Consumer* will be moving away from data collection in three waves, towards a rolling data collection. Experiments are also carried out to evaluate the effects of mixed mode data capturing, using postal questionnaires as the base but offering a web questionnaire option in certain strata.

The second ring – *MediePuls2.0*
The next ring is the new invention – the outcome of the reach question in the rolling web panel based survey (see below). Each day is represented by quite a number of responses (reaching 3 000 daily responses this autumn, hence exceeding one million yearly responses) and all daily newspapers in Sweden (morning papers, tabloids and free sheets) are included in the measurement. Aside from empowering the NRS in *Sesame* with day type data, the data is reported in a custom developed, web-based software in which it can be broken down by newspaper title (or groups of titles); by day, week and month and by traditional demographic variables such as sex, age, education, income and region. The demographic variables share the same standard as *Orvesto Consumer*. Clients of the daily measurement can watch the graphs develop with a four-day lag from the day when the reading occurred.

Just as there is a single source connection on the informant level between the NRS *Orvesto Consumer* and the panel measurement that gives the planning currency for Internet, there will be a single source touch-point between *MediaPuls2.0* and the Internet panel. During 2007 panelists taking part in the readership survey will be introduced in the technical internet panel measurement, allowing for net reach analysis of any media house with off- and online publication on a daily basis.

The third ring – *the receipt on delivered contacts*
The third ring is the contact receipt. Essentially this is left untouched since the earlier version except for the fact that the data collection method has changed and the sample sizes are more than ten times as big. Unsurprisingly there have been some improvements in the planning platform and the like but the only big change is that the feature is available with *or without* the stabilizing RPC calculation. With the sample size expansion big print titles can base their contact receipts and guarantees on the panel measurement alone. The stabilization offered by the circulation is left as an option mainly because local newspapers still need it.

And in fact it has turned out that the whole idea of letting advertisers and planners work out the scheduling of a print campaign rests just as much on the excitement of the game – some planners deliberately try to make bad plans in the hope of being compensated with a free insertion when the guaranteed level is not reached – as on the transparency brought on by a daily measurement.

Bulls eye – *advertising and campaign recall*
And finally, the very bulls eye of the target face, are the advertising effectiveness and recall surveys. This is where we leave the media title level and head straight for the ad itself.

The questions rendering the ad recall data, which builds up graphic reports, always follows the reach questions, single source in the same survey wave. Only those who claim to have read any of the campaign papers get the questions. In principle there is no limit as to how flexible these client specific surveys can be, but for two reasons they tend to be conducted in a standardized way: firstly because non-standard questions are more costly and secondly because only standard questions can be compared with the averages in the reference database that grows with every new measurement.

Since newspaper advertising most often consists not of single advertisements but of campaigns, there is also a campaign recall module within the concept. All the ads that build up a campaign are measured individually, immediately following its insertion, just as any ad recall survey, but the net audience of the campaign is calculated using a rather sophisticated combination of proper and semi single source connections, self completed claimed campaign recall and logical algorithms. Under the hood it is all quite complicated but it is designed to produce comprehensible, easily communicated campaign evaluations.

We believe that the face of ad- and campaign recall research is currently changing. From being something very often initiated by media owners more or less just to have something nice to talk about in sales meeting with advertisers, this kind of research is turning into something almost as important as reach and circulation figures. And even though there are prize limitations to any survey centered around just one piece of advertisement, with the increased importance comes a new demand: ad recall surveys need to be carried out in a way that they can actually be trusted.

All ad- and campaign recall survey results are stored in a reference database that is linked to the national ad spend database. That way the recall and attitude figures achieved by a campaign can be compared with the averages of other campaigns that are comparable in terms of format, product categories and, most excitingly, in terms of ad spend. The connection between ad recall and ad spend allows for calculations of costs per thousand along measures that are a lot closer to actual effects than title reach.

It should be said that technical ad exposure surveys are also carried out for internet advertising and that those surveys soon will be offered single source with the print campaign surveys. That way the print media houses can illustrate their capacity as ad

carrying vehicles across their different platforms and give the advertisers the net audience for any combination campaign, in the advertiser's target segment.

The connections between the research approaches

In Sweden, as in most countries, advertisers and their contracted planners at the agencies regularly use a variety of different media to reach different targets at different times. And in Sweden, again as in most countries, a media house may be spawned out of a morning paper but today find itself selling advertisement space in a free sheet as well, and a radio station and a few websites. The concept sketched above is designed for such a mediascape, not only because it holds the adequate components but also in the way the components are fitted together.

The calibration to the planning currency levels
To our experience the advertisement market needs one shared and agreed upon currency in order to function. If there are discrepancies between the figures used for planning and the figures used in post evaluation a counter-productive debacle is inevitable. For this reason the DAR-figures produced by the daily web survey are calibrated to the reach levels of the planning currency *Orvesto Consumer*. That means post evaluation can be kept in line with planning estimates.

Before taking the decision to calibrate the daily web survey in the same fashion as we had done earlier with the CATI-version of *MediePuls,* we let the measurements run in parallel for three months. On an aggregate level it turned out that the CAWI DAR-figures reported reach levels in between the postal frequency figures in the NRS and the significantly lower figures in the CATI DAR. The chart below shows the indexed differences for all dailies treated as a group.
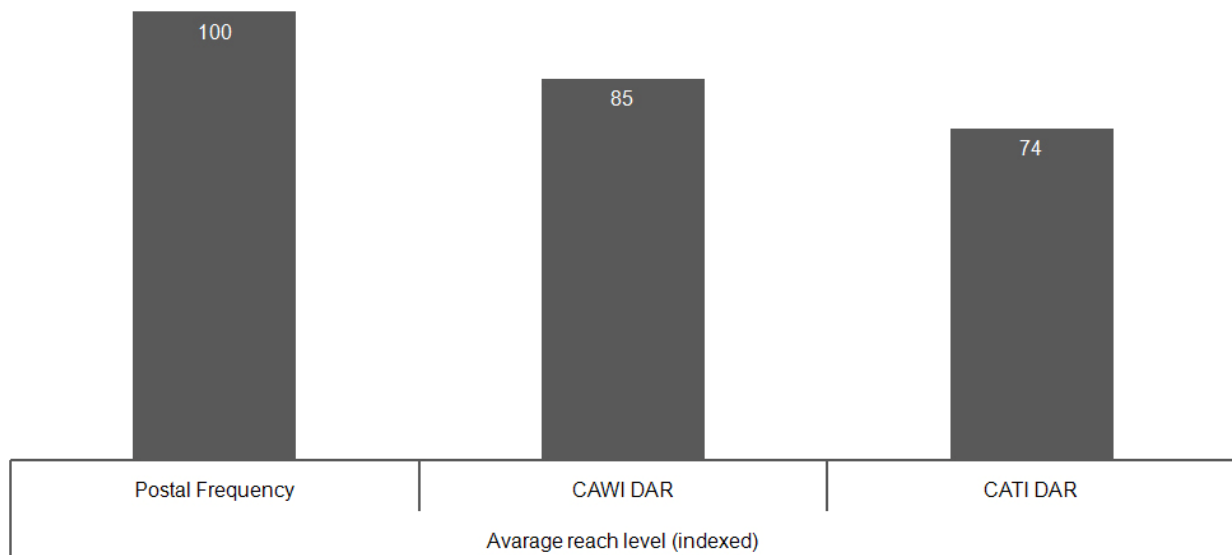
It is worth noting though, that there are more differences between the measurements than just the data capturing. The NRS figures rests on a frequency scale, while the others are using day-after-recall. The postal questionnaire is sent out to a random sample of individuals, the CATI survey employs a random sample of phone numbers and the CAWI is using an internet panel recruited from CATI with the inbuilt respondent drop-out operating at more than one stage. And of course the patterns vary between different individual newspapers and newspaper categories.

The graph should not be interpreted as evidence of one methodology being better than the other. Anyone involved in media research knows that changes in just about any part of a readership survey will mean changes in the results.

Our reason for calibrating the post evaluation survey to the levels of the planning currency was three fold: Firstly the NRS still lies at the heart of media research and it made more sense to calibrate the newcomer – the daily evaluation figures – to its levels rather than the other way around. And secondly, the turbulence that would hit the Swedish media market if we were to adjust the planning currency to the generally lower levels established in the CAWI DAR, would not have been in anyone's interest. Thirdly a calibration in the other direction would mean that a time series of quite substantial length would be broken and the newspaper industry would be left at year zero once again.

Following the logic of providing one, and only one, currency we plan to calibrate the reach figures of newspaper websites in the same way. That means the internet planning data – today released monthly in *Sesame* – will give the general levels for the daily internet statistics as soon as there is a single source connection between the internet measurement and the daily print measurement.

Enriching the NRS with day type variations

However, the database connections are not one way streets. *Orvesto Consumer* lends its levels to *MediePuls2.0* but *MediePuls2.0* also contributes to the planning currency by giving the average differences, title by title, between different days of the week. That means planners can take day type variations into account when planning print campaigns. Experiments are also initiated to allow for even more sophisticated time-based planning by the creation of virtual diary data based on the findings in the daily measurement.

METHODOLOGY
The panel based daily measurement of newspaper consumption

In Sweden the NRS, with its 50 000 yearly answers about newspaper reading, is considered big. Behind the daily measurement described in this paper hides more than 350 000 interviews per year. And still, that in itself is not enough to turn into reliable DAR statistics about local papers on single days. Therefore the questionnaire contains questions about the reading of specific titles yesterday, the day before yesterday and the day before that, whereby we end up with three times as many statements about each day than there are interviews, summing to astonishing one million plus responses per year.

Panel size
All together some 50 000 active panelists will be engaged in the measurement. 25 000 is already in operations and the measurement has been at that level for about a year. The panel is randomly divided into 29 equally large subgroups and every day, early in the morning an invitation is automatically sent out to one of the groups. The picture below illustrates the design:
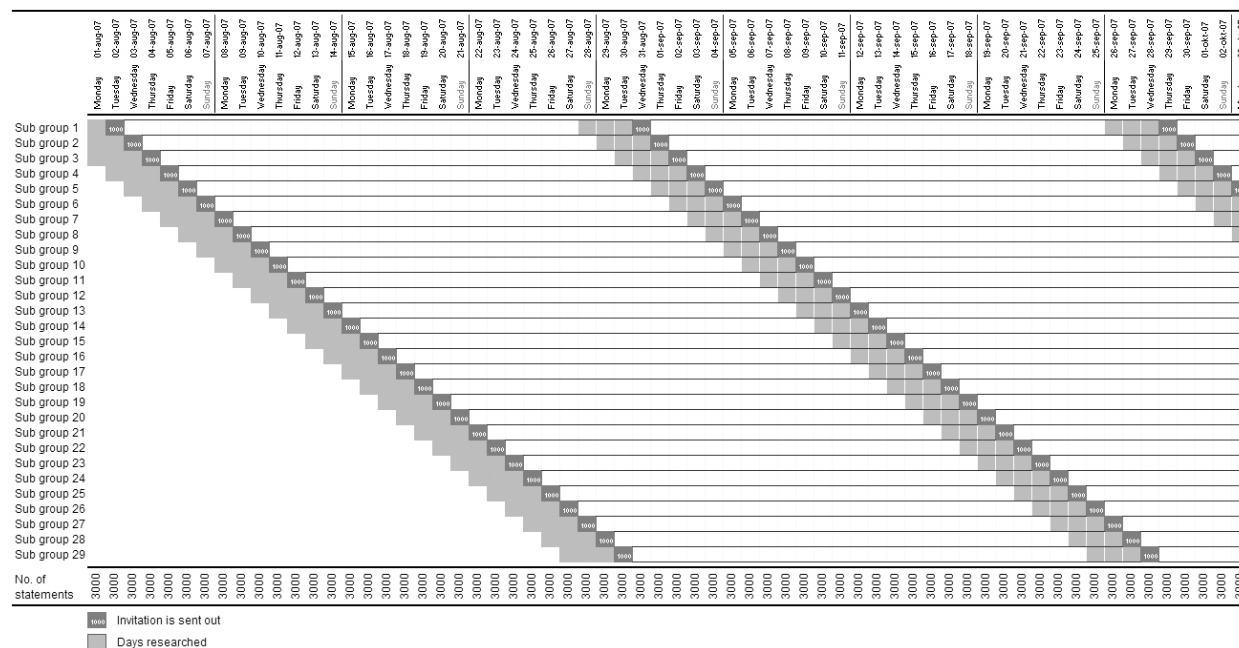
One of the elegant things about the measurement is that no dates or weekday names are actually mentioned to the respondent. We just ask for yesterday, the day before etc. and use the timestamp generated by the CAWI software to work out what yesterday meant in terms of date. Of course people that don't reply to the first invitation are encouraged by reminders that are automatically scheduled as well.

The reason for the splitting up of the panel into 29 subgroups is that it gives the panel members the optimal months (in terms of panel maintenance in Sweden) rest between the waves. But it also means that if the invitation was sent out on a Monday in January, it will be a Tuesday in February. This way we will always have three days in a row single source and then the next single source point a month away but likely to hold other day types (there is not space enough in this paper to discuss it but analysis at the individual level of changing patterns over time have turned out to be very revealing and quite exciting for some media houses).

The decision to ask about three succeeding days was taken after thorough testing. After all, it was meant to be a day-after-recall survey and not a kind of survey that, in its asking for readings way back in time, would force people to think in terms of what they usually do rather than what they actually did on a specific day, since that in effect would have left us with something dressed up as a recency measurement but in fact performing like a frequency measurement.

Anyway, very much thanks to the way online questionnaires allows for creative layout and constraints surrounding each answer, it turned out to work well. There are no statistically significant differences between the answers about yesterday and the answers about days prior. There are not even differences when compared to answers given by people only faced with questions about

yesterday. We are asking our respondents to remember what they did three days ago. And they do, save for one tiny exception: on Wednesdays the day before the day before yesterday is a Sunday, and there is indeed a slight over-estimation in that fraction of the answers of the reading of titles that are not published on Sundays.

All of that is solved with a database synchronization with the ABC database of newspaper distribution schemes. If a newspaper is not published on a given day, it does not get any readers that day in the analysis tool, even if there are respondents claiming to have read. Sure, there might be people reading yesterdays issue, but the measurement is geared towards post evaluation – a practice that for obvious reasons are focused on the days of campaign insertions. So, even if the readings of older issues are not irrelevant it is not represented in the output interface.

Panel representation

The panel used for the daily web interviews are recruited in random CATI omnibuses. That means that all Swedes with internet access have the same theoretical chance of entering the panel. In Sweden the Internet penetration is above 80 per cent, but still: establishing and maintaining a representative internet panel is tricky business. In short we insure that it is representative by adhering to a number of quality-protecting exercises:

- The response rate in the initial CATI recruitment survey is kept at a high level (60-70%) by a combination of an ambitious number of attempts at reaching each person in the sample and Research International's unique brand in Sweden, were we operate under the name SIFO – by far the strongest research and opinion polling brand in the country.

- The recruitment rate to the panel is kept high (60-70%), partly as a result of a generous and individualized interviewee incentive program.

- The response rate in the web questionnaires themselves is kept high (60-70%) again thanks to incentives and a thoroughly worked-out fieldwork and reminder practice.

- Non response analysis is done at all stages and contains both comparisons with official census data (sex, age and region) and with demographic, psychographic and socio-cultural propensities taken from the postal data of *Orvesto Consumer.*

- The differences that are identified – some of them a consequence of the profile differences between internet users and non-users, some of them having to do with biases in drop out – are post stratified in a way that minimizes their effect on the dependent variables (the reach data).

- All collected data is cross-tabulated against the number of months / survey waves that the respondents have been part of the panel. Panel members are shifted out at such a pace that no significant differences occurs between newcomers and those who have been panelists longer.

And at the end of the day one must remember that the purpose of the daily measurement is not to establish newspaper reach levels, but to capture the variations in readership over time. The actual levels are taken from the NRS with the help of a rolling calibration. As mentioned, the raw data from the daily measurement returns readership figures at intuitively very reasonable levels – generally somewhere in between the postal NRS and the previous CATI DAR – but in terms of how representative the panel is all we are really asking is that the panel is representative in terms of variations. The absolute percentage of people reading this or that newspaper is not important as long as the sample reflects the variations between different days.

OUTPUT
Delivery platforms

The user interfaces involved in the concept are divided along the same line as the data collection: what works for planning does not necessary suit the needs of post evaluation, and the other way around. The planning platform, *Sesame*, on the one hand is very complex and flexible and runs as a client software with uncountable features and functionalities for reach and frequency analysis, target profiling, cost based multimedia planning, response estimations etc. Combined with the frequency question it also allows a very deep and dynamic analysis and understanding of the readers of the newspapers. The evaluation platform on the other hand is a fairly undemanding interactive webpage in which reach development can be analyzed graphically in a limited number of sub groups.

Sesame – the planning software   **The Mediepuls2.0 online tracking platform**


These are the two main client systems. Then of course there are other platforms and reports involved as well. The contact guarantee for example comes with a tailor-made online platform for each client where future campaigns can be projected and present campaigns can be evaluated as they go, with real time indication of the progress after every ad insertion. Some clients have chosen to open their system up to advertisement buyers while others have decided to keep the system internal and just send out the guarantee certificate that is produced at the end of a campaign.

The ad and campaign recall surveys are obviously also delivered as digital graphics. In order to make them instantly useful to the client's sales-force it comes in the shape of pre formatted PowerPoint presentations.

OUTPUT
Some examples of real data findings

The measurements have been running for some time now. Therefore there are a lot of data to look at. Yet most of the data are of the kind that can be seen in the upper right hand screen dump of the tracking tool – long reach curves for individual newspapers. Some findings however are more generally applicable. For example we notice that the day type variations are of different proportions for different newspaper categories.
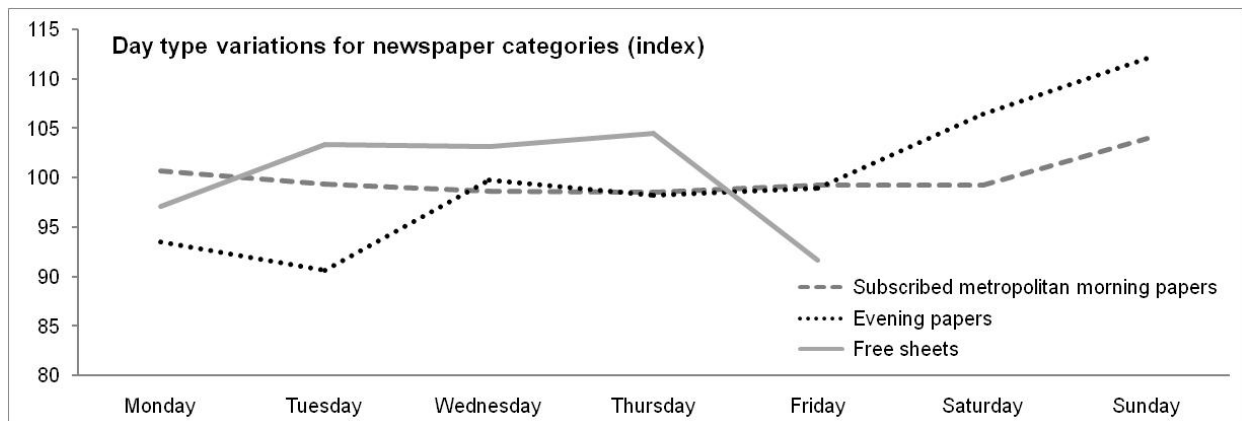

The subscribed big morning dailies have almost no variation across the week when analyzed as a group. The evening papers have audiences that grow towards the end of the week, presumably because of their focus on entertainment and events; and the free sheets have reach levels dropping on Fridays when fewer Swedes are on the move in areas (business areas and public transportation) where the free sheets are distributed.

It should be said though that there are quite large differences between the subscribed metropolitan morning papers, while there are almost no differences between the different free sheets and only small differences between the evening papers. In other words it takes more than just knowledge about what category a newspaper belongs to know its variation across the week. One needs data for individual titles.

Reach development approaching Eurovision (index)
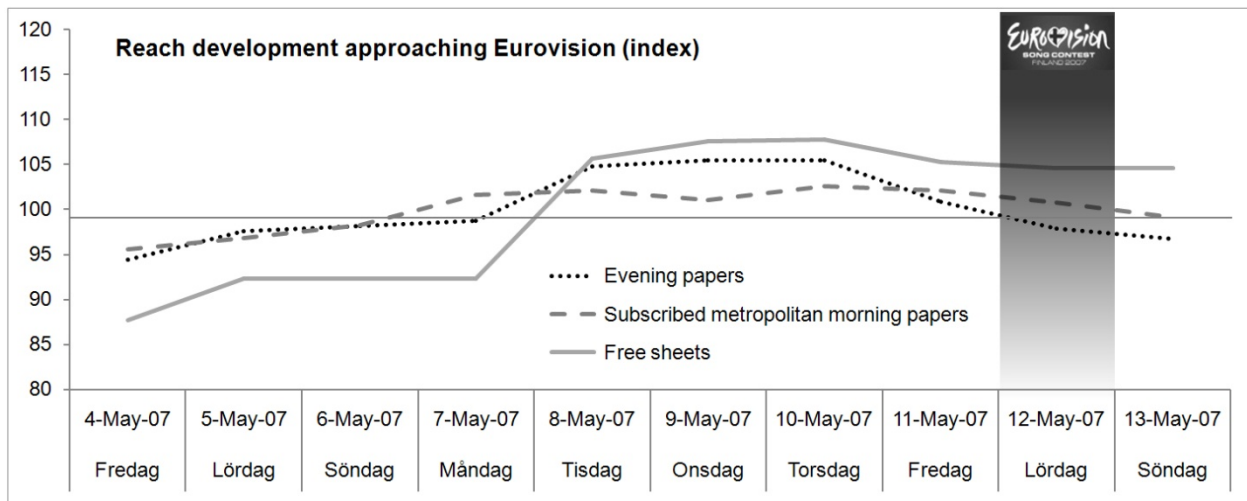
Above is another example of the speed and dynamic that the new data gives the market. Swedes are strangely obsessed with the Eurovision song contest. Every year we expect the rest of Europe to acknowledge our greatness – this however happens quite rarely. The week before the contest Swedish news media are filled with exciting stories on subjects such as how the Swedish winner will celebrate the anticipated victory.

If we look at the graph we can see that all dailies benefit from this but that it is the free sheets and the evening papers that gain the most. This is exactly what we would have expected thinking of both the content of the papers and the fact that they are not subscribed, thus more likely to gain or lose readers quicker.

Develpment of reading in Stockholm
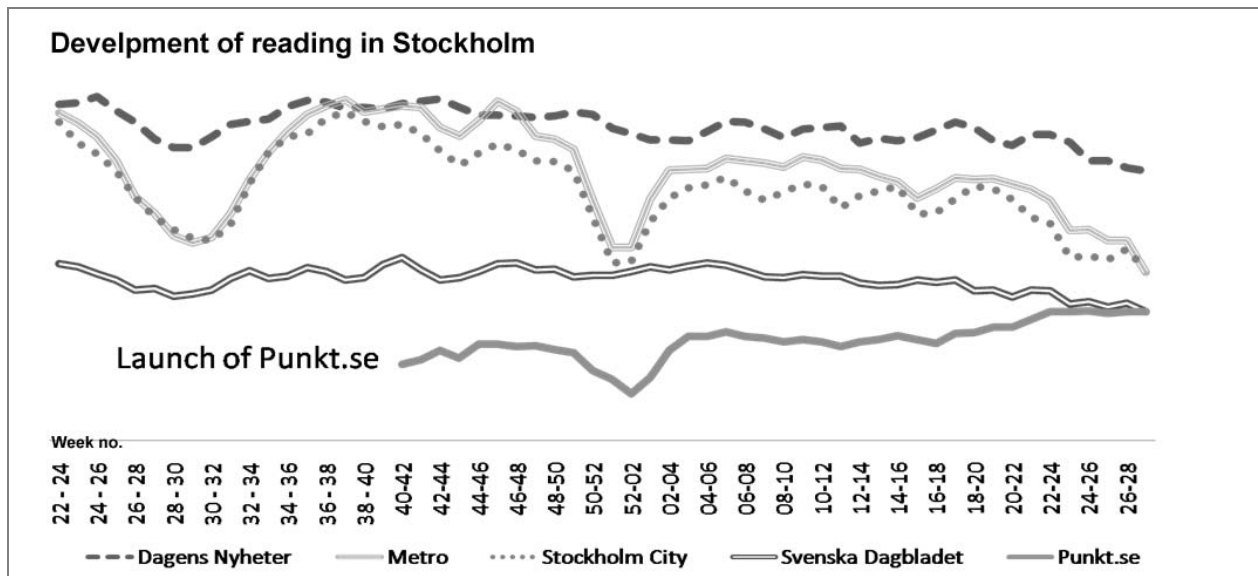
As mentioned earlier, Sweden and Stockholm in particular is now harboring a number of very successful free sheets. The new daily survey allowed us to closely – on a day by day basis – monitor the launch of the third combatant on the free sheet market. In this graph (for reasons of clarity showed on a 3 weeks average basis) you can clearly see what happens in the market which now starts to get quite crowded. The battle for readers is very hard and a daily delivery of data allows media owners and media planners to really – from day one – evaluate new entrants on the market place. The graph also show the dramatic drop in reach levels for the free sheet during summer and Christmas holiday weeks.

OUTPUT
Voices from the market

Good intentions and good research are however useless if it is not well received in the market place. As of today eight media agencies and four newspaper companies are using the new data. In order to get to understand how they used the new data we did something quite controversial for a media research company – we asked them:

"*Since we at MEC work with many of Sweden's largest print advertisers, we constantly strive to be on a cutting edge level.*

The contact guarantee and the receipt on the number of delivered contacts help us to show the effect of strong print campaigns and to better understand the achieved results, thus securing that our clients get the best value of their media investments.

It also provides us and our clients with useful information to take into consideration in post evaluation and for the planning of future campaigns"

Julia Nyberg - Print Director, Mediaedge CIA

"*To give our clients maximal response on their advertising we are investing heavily every day in print. MediePuls is an essential tool to help us evaluate these investments.*

Reach figures might change quickly and by using daily reach data it is easier to maximize the effect of the campaigns"

Louise Fallenius - Media Director Print, Carat

"*Reach data on a day type level is something we and our advertisers benefit greatly from.*

Given the increased complexity due to different editorial content (Supplements, classifieds, theme sections etc.) that vary over the weekdays, leads to changes in readership patterns over the weekdays between different reader groups. Even given the fact that most of the dailies are subscribed, thus relatively more stable.

By taking the day type variations into account while planning we can make our media buying even more efficient. The more dynamic reach figures also give us a better understanding of how readership varies over a week and we can also get a learning on the seasonal patterns and variations that occur between the NRS releases.

For the evening tabloids, which are not subscribed, it is even more interesting to see the clear fluctuations between the weekdays. Over time we can also get a clearer understanding of the importance and correlation of the newspaper headlines to the reach.

In the next step we look at the reach figures per day type and put them into context by looking at the relative clutter in the different target groups and in the advertised category, thus finding days to advertise when reading is high within TG and where the competition and clutter normally is lower. By using the new data, this is why we at MediaCom are taking print planning further and really can optimize buying in newspapers to our clients benefit"

Jimmy Bolander - Print Director, Mediacom

"*We have collected data over a long time. From studying the data we get a better understanding of the relationship between delivered copies and reading behavior. To combine daily observations with audited information of the number of delivered copies gives us a good understanding of our daily deliveries*"

Håkan Noreby – Responsible for sales strategy and analysis, Admera (Local newspaper group)

"*My experience from MediePuls is quite extensive. I have worked with the concept both as a media director at Carat and now as a consultant in my own company.*

At the agency the survey was an excellent tool when negotiating. To negotiate professionally one needs to know everything about your opponent. MediePuls gave me that opportunity. It was also an important tool to get a good general understanding of the complexity of the newspaper market. It worked very well to see movements of readers over time. My problem at the time was that I really could not verify that the figures MediePuls showed were correct.

However, I am now working as a consultant to Metro (Sweden's largest daily) and I can now verify that MediePuls correlates "surprisingly" well with the number of delivered copies.

We are closely monitoring the changes in the number of delivered copies every day and compare with the daily net reach figures. It works – RPC values are varying minimally over the seasons. Sweden now has daily reach for dailies – we just need to find a clever way of commercially benefit from it. We could of course relate our advertising prices to the daily reach figures "

Johan Drakenberg CEO Drakenberg Media

" By using Impact Planner (NB the clients own branded tool for delivery of data) *the planners gets to know exactly how many contacts they got on the actual days of the campaign.*

Representing the evening tabloids it is obvious that the reach figures vary a lot depending on day of week and season. The variation is also large when something especial happens in the world – this is being reflected well. As an advertising buyer you get a receipt on what was actually delivered and this is something that has been missing on the market for a long time "

Thomas Juréhn, CEO Mediateket

Summary

The Swedish newspaper industry are able to show their value to the advertising market by using a intricate web of surveys – all intertwined and designed to provide advertiser the best value and by doing this strengthening the medium itself.

1. The TGI/NRS provides the market with full multimedia planning possibilities (including the newspapers own Internet editions) on detailed target group data and for newspapers on a day type level.

2. The *MediePuls2.0* survey which is calibrated to the NRS gives the market a continuous stream of new readership data every day – it also adds the flavor of day type data into the media mix stew

3. The receipt on delivered contacts (by using circulation as a stabilization factor or without if there is no measurable circulation data) provides the media with further accountability

4. The campaign measurement surveys which are connected to the *MediePuls2.0* survey give the industry further information on how campaign or individual ads worked

When summarized into four bullet points it sounds quite simple but it is important to stress the fact that this is not a description of isolated surveys but a story of a system of surveys interconnected and enriching one another.

We strongly believe it can be beneficial to think in terms of planning vs. evaluation, but that even though we might use different surveys to make the respective practice possible, there is only room for one currency, or the market will be left in chaos. We also strongly believe in a holistic approach and that the research solution presented in this paper, by acting on these beliefs, helps giving a good understanding of the complex market place of Swedish newspapers.

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