

Measuring Media Audiences

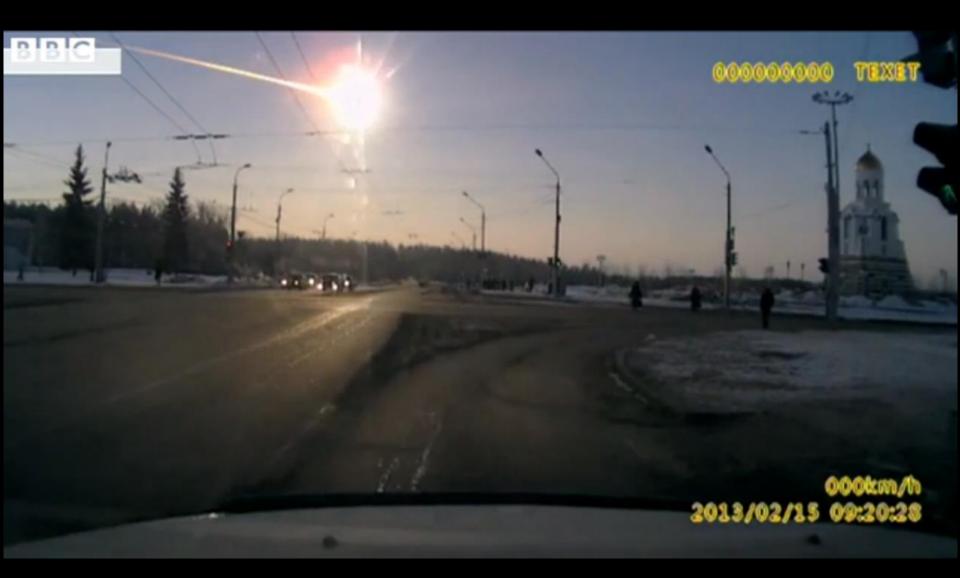
University of Hamburg, 9 January 2014

Dr Neil Thurman

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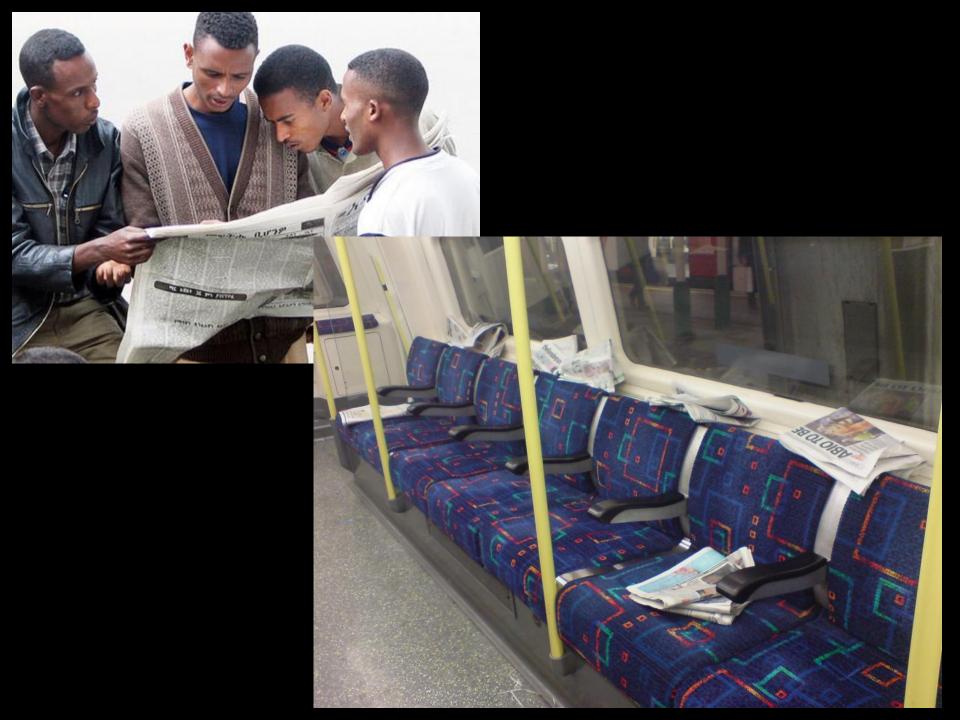








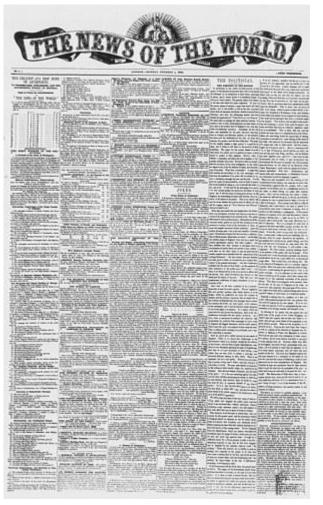
- Who determines journalism's 'audience' and why?
- What is the 'audience marketplace'?
- How are audiences measured, with what limitations?
- How is new technology undermining & disrupting the creation of journalism's audience ...
- ...and with what effect on the content & structure of journalism's institutions?







Who determines journalism's 'audience' and why?



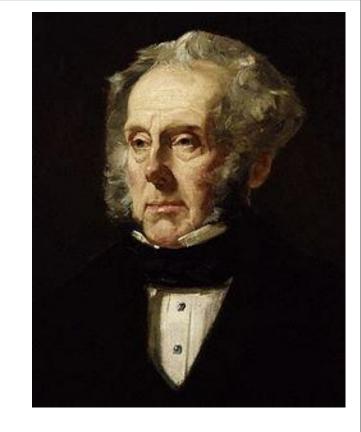


News of the World, October 1843

News of the World, 1917



"The profit of the newspaper arises from the price paid for advertisements, and the greater the number of advertisements the greater the profit."



SARAKA CALE

- Viscount Palmerston in a letter to Queen Victoria, 30th October 1861.



"The profit of the newspaper arises from the price paid for advertisements, and the greater the number of advertisements the greater the profit. But advertisements are sent by preference to the newspaper which has the greatest circulation"

- Viscount Palmerston in a letter to Queen Victoria, 30th October 1861.

CIRCULATION

OF THE

LIVERPOOL MERCURY.

We are sure our friends, and the advertising public will be gratified with the following weekly average circulation of the Mercury, carefully drawn up from our stamp stock book and printing account.

WEEKLY AVERAGE SALE OF PAPERS

EVERY PRIDAY.

First half-year, 1846	8404
Third quarter, to Sept. 25, 1846	
Second half-year, 1816	8523
Fourth quarter, 1846	8643

This result calls for the most grateful acknowledgments of the proprietors to the public, and must be highly satisfactory to their advertising friends, as it is a larger number than was ever previously attained for a similar period.

The number of the third quarter is the common average, excluding altogether the large extra sale of papers on the occasion of Prince Albert's visit to Liverpool Had that excess been added, the average of the quarter would have amounted to 9657 each week.

Liverpool Mercury - Friday 01 January 1847



Member of the Audit Bureau of Circulations.

All enquiries to: Head of Advertisement Department,

B.B.C. Publications, 35 Marylebone High Street, London, W.1.





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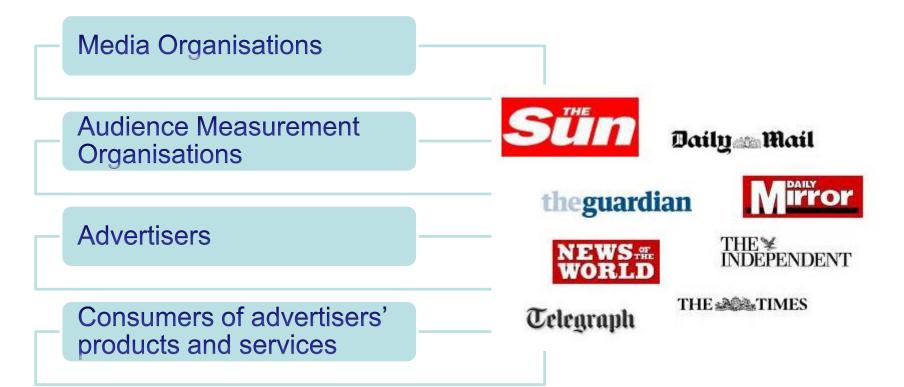


Need some help?

Don't be shy, feel free to contact us if you need some assistance.

- Call us or email us
- Jargon buster











Media Organisations

Audience Measurement Organisations

Advertisers

Consumers of advertisers' products and services









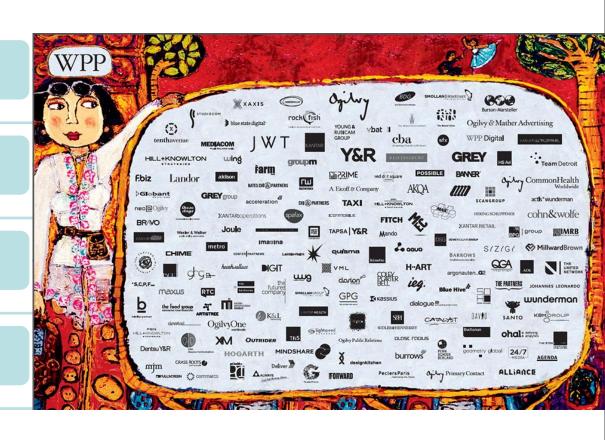


Media Organisations

Audience Measurement Organisations

Advertisers

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Media Organisations

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- Who determines journalism's 'audience' and why?
- What is the 'audience marketplace'?
- How is that audience measured, with what limitations?
- How is new technology changing / challenging conception of journalism's audience?
- How does audience measurement affect content & structure of journalism's institutions?



- ?
- ?

Newspapers

Circulation (physical copies)

• And...?

Internet

- ?
- ?

Radio

- ?
- ?



 Min-by-min physical presence in room when TV is on ('people meter'), etc

Newspapers

- Circulation (physical copies)
- Readership, etc

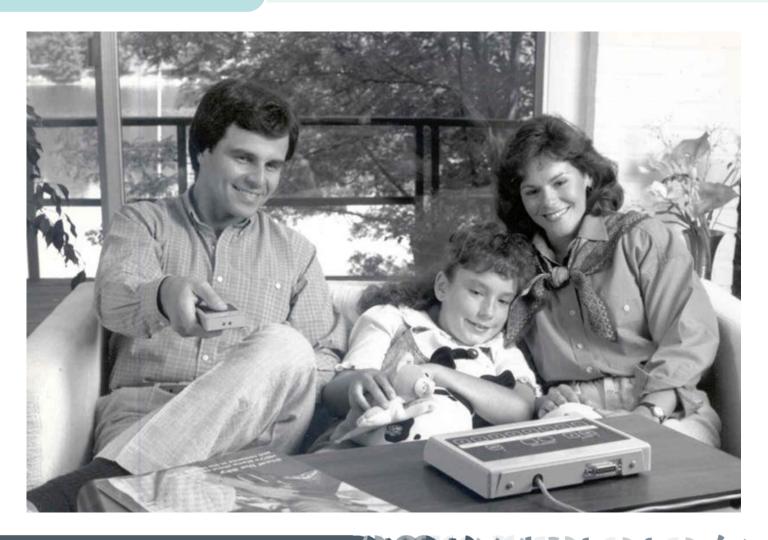
Internet

- Unique Users
- Page views, etc

Radio

 Individuals who say they've listened for least least 5 mins / week (questionnaire), etc

 Physical presence in room when TV is on ('people meter'), etc



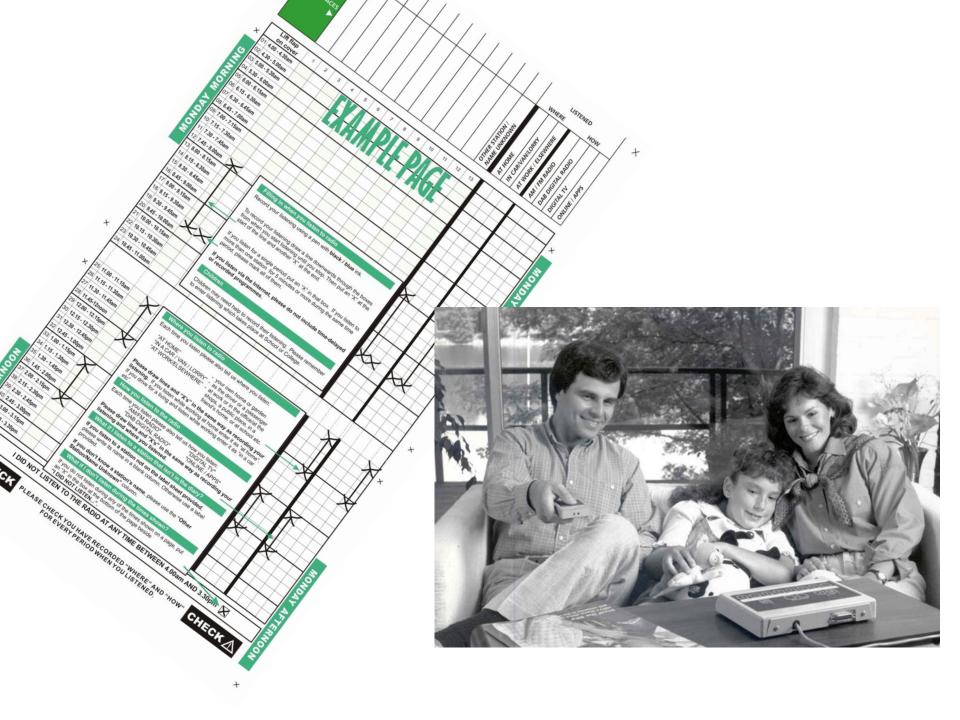




media audiences have been described as "institutionalized", defined in particular ways, "using analytics tools and perspectives that reflect [media organizations'] needs and interests"

ANDARDAY CONTR

- Napoli, 2011: 3.





"although many advertisers, media organizations, and media planners are aware of the limitations of audience measures, they seldom consider these limitations in day-to-day practice. As long as all participants in the transaction treat the data as accurate, the inherent unreliability of the data has no significant effect on the exchange. The marketplace conveniently overlooks the estimated nature of all measures and instead perceives and treats them as the 'truth' (Gitlin 1983)."

- Napoli, 2003: 82



"the audience marketplace illustrates two countervailing forces. On the one hand, the desire for better quality in audience measurement persists, because better measurement means a higher-quality product (something generally desired by both advertisers and media organizations). On the other hand, the audience marketplace wants a single parsimonious currency, something achievable only when the provider of audience data is a monopoly"

- Napoli, 2003: 20



 Min-by-min physical presence in room when TV is on ('people meter'), etc

Newspapers

- Circulation (physical copies)
- Readership, etc

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Liverpool Mercury - Friday 01 January 1847

SCALE

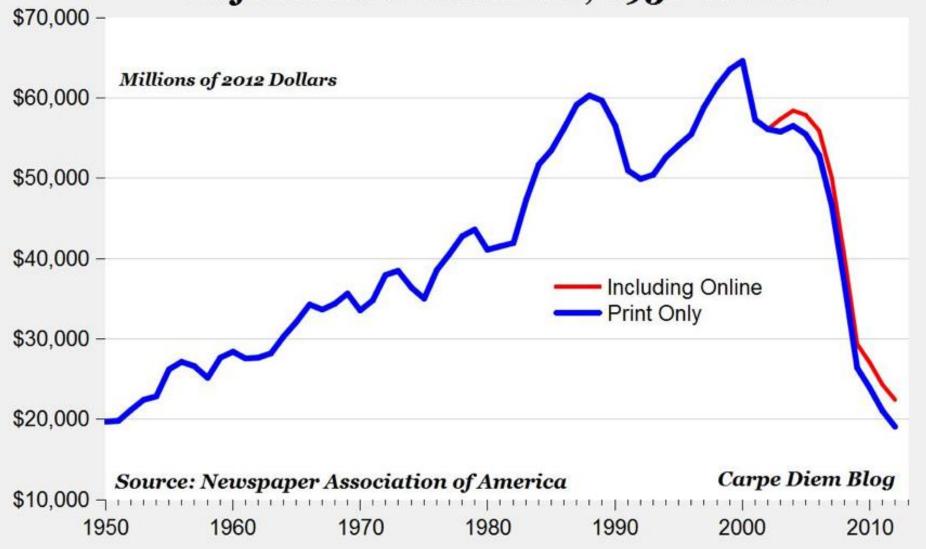
Fifteen years ago, The Telegraph brand reached one in five of the UK population per year. Today, it reaches one in three.

http://www.telegraph.co.uk/advertising/ (6 June 2013)



The University for business and the professions

Newspaper Advertising Revenue Adjusted for Inflation, 1950 to 2012







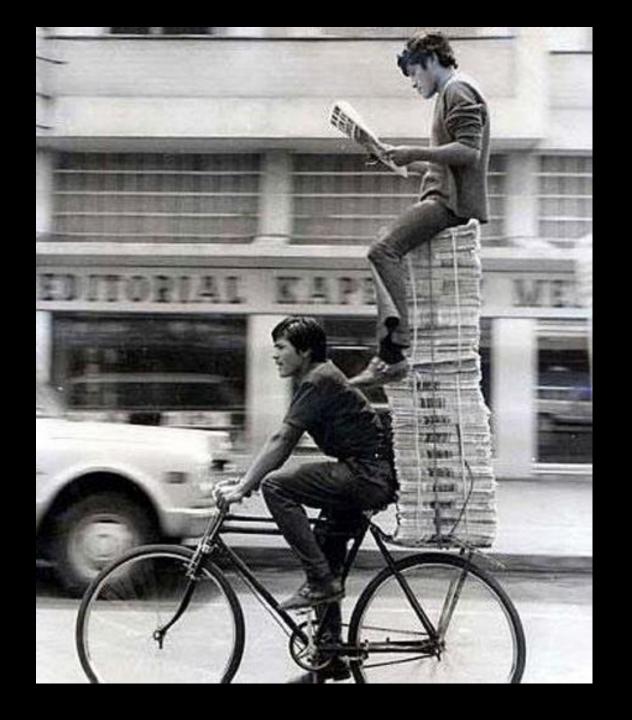
"most efficiently and effectively reach our readers in all-digital format"

Tina Brown & Baba Shetty



"most efficiently and effectively reach our readers in all-digital format"

Tina Brown & Baba Shetty





Limitations of 'circulation' as a measure of newspaper audiences

• Physical newspapers can be read by more than one person





Limitations of 'circulation' as a measure of newspaper audiences

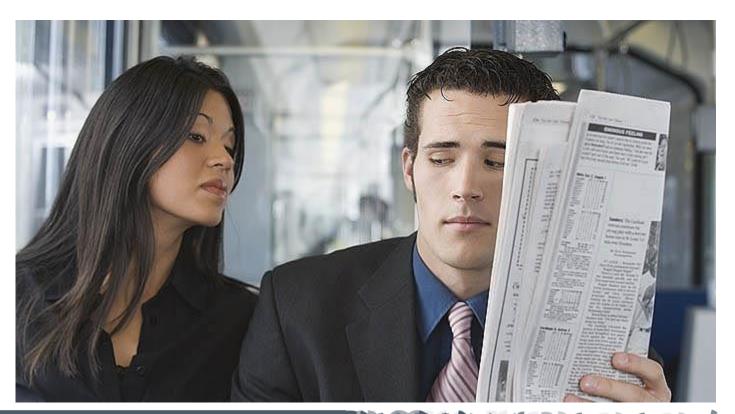
 Not all copies circulated are read ['bulks']

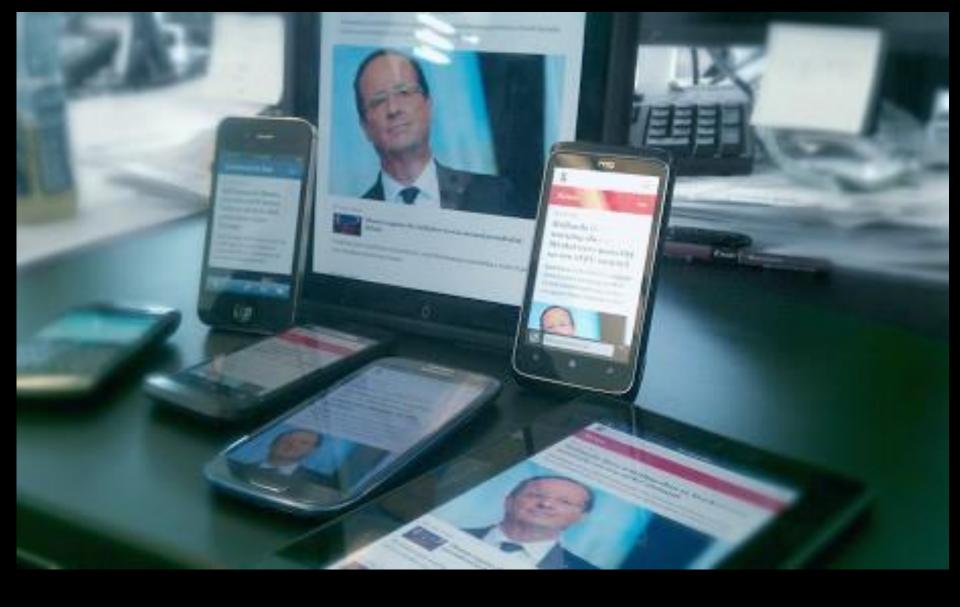




Limitations of 'circulation' as a measure of newspaper audiences

• Circulation is a measure of 'exposure' but not attention / engagement





- Montly Page Views / Impressions
- Montly Unique Users / Browsers



Limitations of 'unique user / browser' as a measure of online audiences

- Measures browsing devices not people. A person can be counted as three 'users' if they access a website from home computer, work computer & mobile device
- Spiders / Robots can be counted (not real people!)



"On the Internet, nobody knows you're a dog."



Limitations of 'page impression' as a measure of online audiences

- Again Spiders / Robots can be counted (not real people!)
- Interactive features (e.g. games / data visualization) not page based
- Long online video session = single 'page view'





Incompatibility of newspapers' standard print/online audiences metrics

Online metrics - monthly

Online metrics – measure pages read and browsing devices

Newspaper Audiences

Print metrics - daily

Print metrics - measure physical copies distributed



Daily popularity



"our media system is migrating towards a post-exposure audience marketplace ... in which traditional exposure metrics will lose their predominant position [and may be]supplanted by other dimensions of audience behaviour [this]... may have dramatic implications for the process of cultural production"

- Napoli, 2011:15



- Online available from a variety of commercial providers:
 - Nielsen mainly panel based tracking
 - Hitwise data from ISPs
 - ComScore mainly panel based tracking
- Print available in the results of face-to-face reader surveys (e.g. UK National Readership Survey)



Daily Popularity

- Online number of daily online 'sessions' can be sourced from a variety of commercial providers (e.g. Nielsen, in this case).
- Print daily print readers: derived from the results of face-to-face reader surveys (daily 'readers per copy' x daily circulation).



Daily popularity



Time Spent Reading:

Audience \ Channel	Print	Online
Domestic	RQ1	RQ2
Overseas	RQ3	RQ4

Popularity:

Audience \ Channel	Print	Online
Domestic	RQ5	RQ6
Overseas	RQ7	RQ8

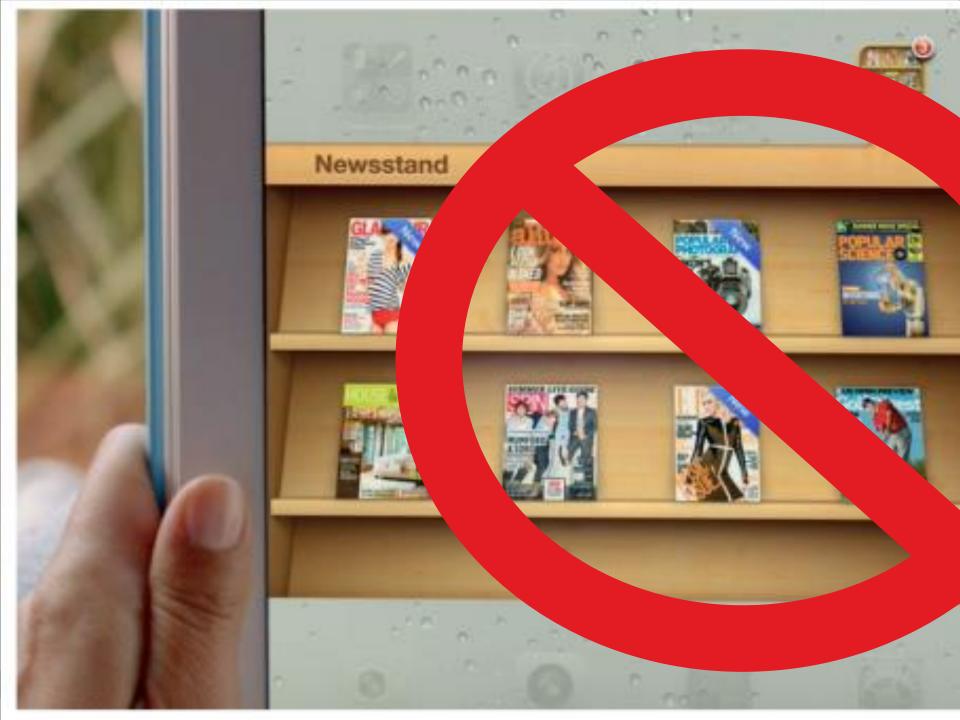


Sample: 12 UK National Newspapers

- 2 middle market (Daily Mail, Daily Express)
- 5 popular / tabloid (Sun, People*, Mirror, Daily Star, Daily Record)
- 5 quality / broadsheet:
 - 3 free to access (Independent, Guardian, Telegraph)

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- 2 with paywall (FT, The Times)
- Monday-Fri, Saturday and Sunday print editions and their online channels (excluding 'apps') were considered
- * Sunday-only newspaper





UK National Readership Survey





UK Audit Bureau of Circulations

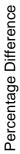


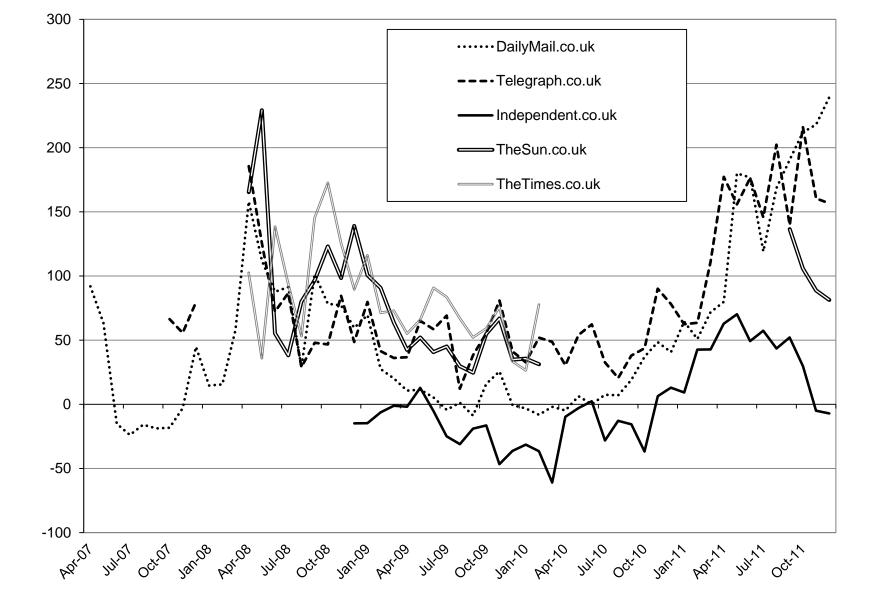




The Nielsen Company (UK panel)



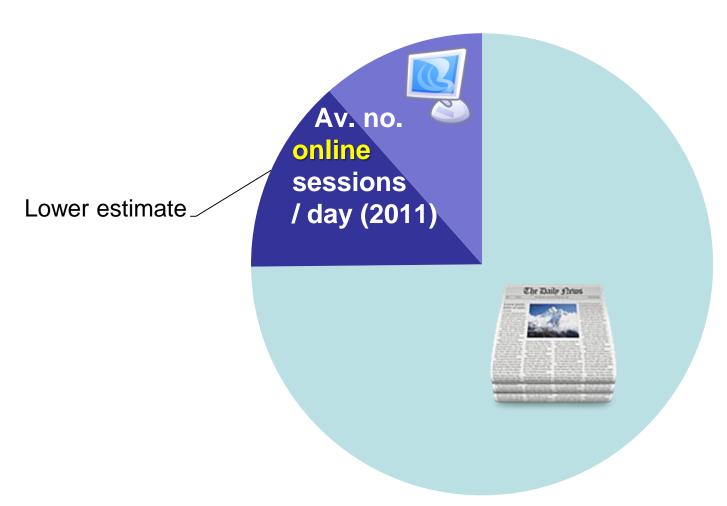




Note: Nielsen page views give the zero percent baseline. The data series represent the percentage difference between that baseline and the number of page impressions registered by ABC.

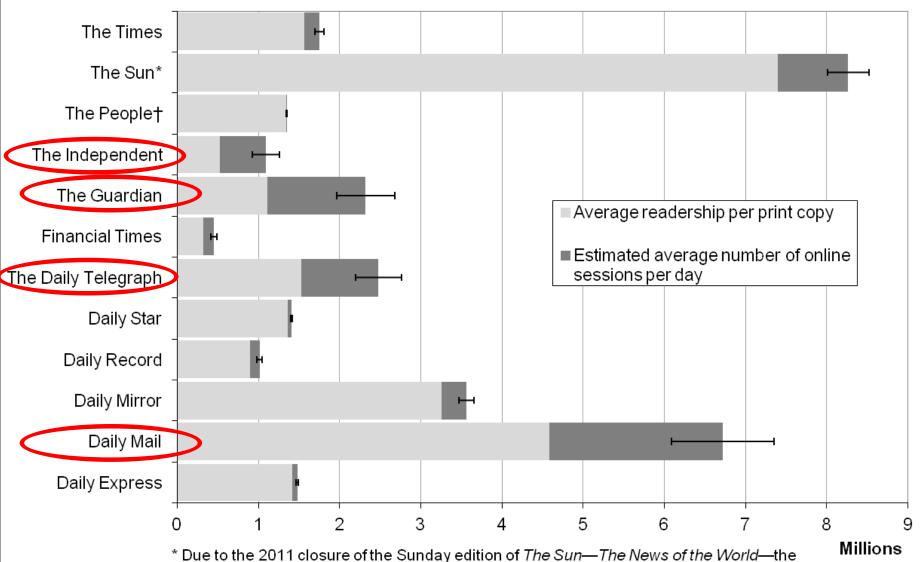


Results: Domestic Popularity



Av. daily readership per print copy (2011)

Results: Domestic Popularity, 2011

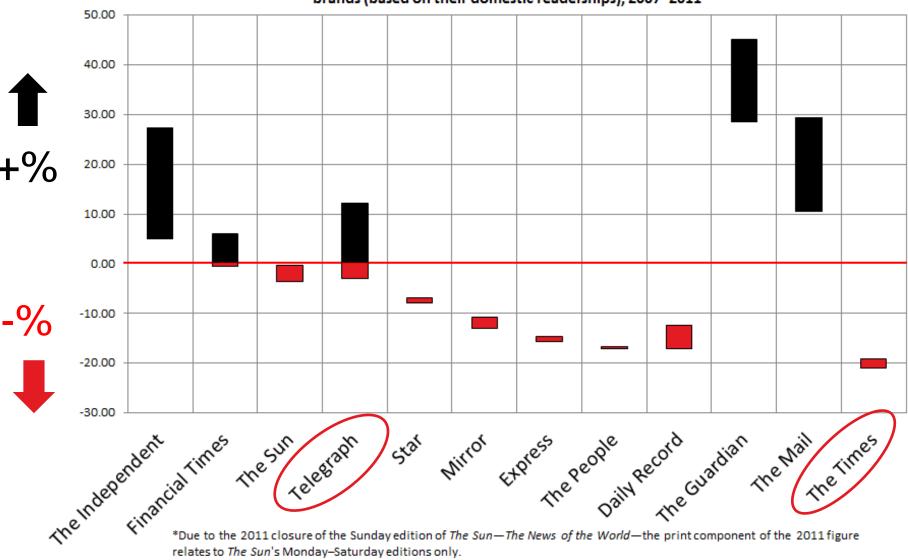


^{*} Due to the 2011 closure of the Sunday edition of *The Sun—The News of the World—*the print component of these figures relate to *The Sun*'s Monday—Saturday editions only.

† The *People* publishes in print on Sundays only.

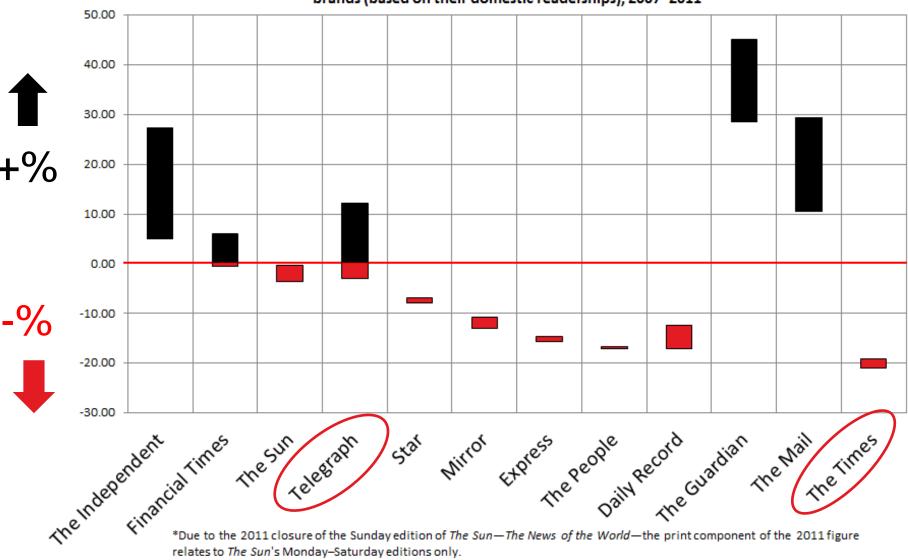
Domestic popularity. Changes 2007-11

Estimated changes in the combined print and online 'popularity' of 12 individual UK national newspaper brands (based on their domestic readerships), 2007–2011



Domestic popularity. Changes 2007-11

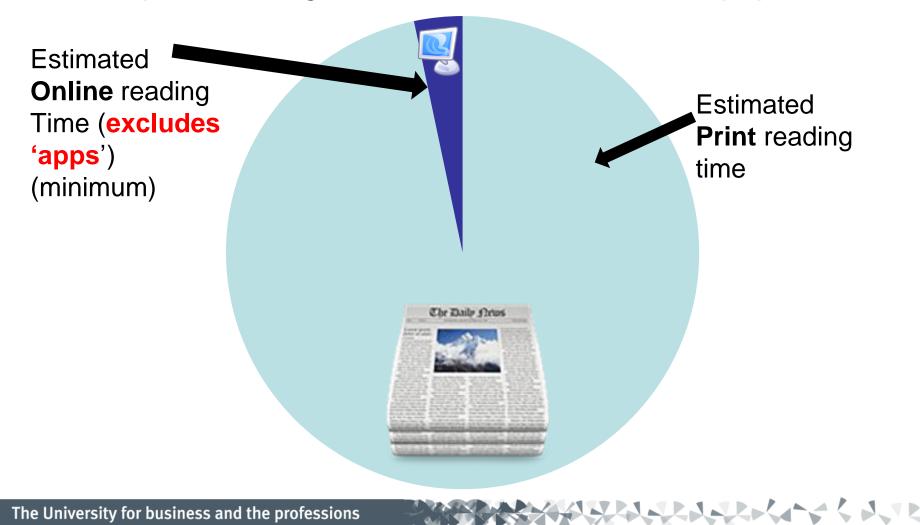
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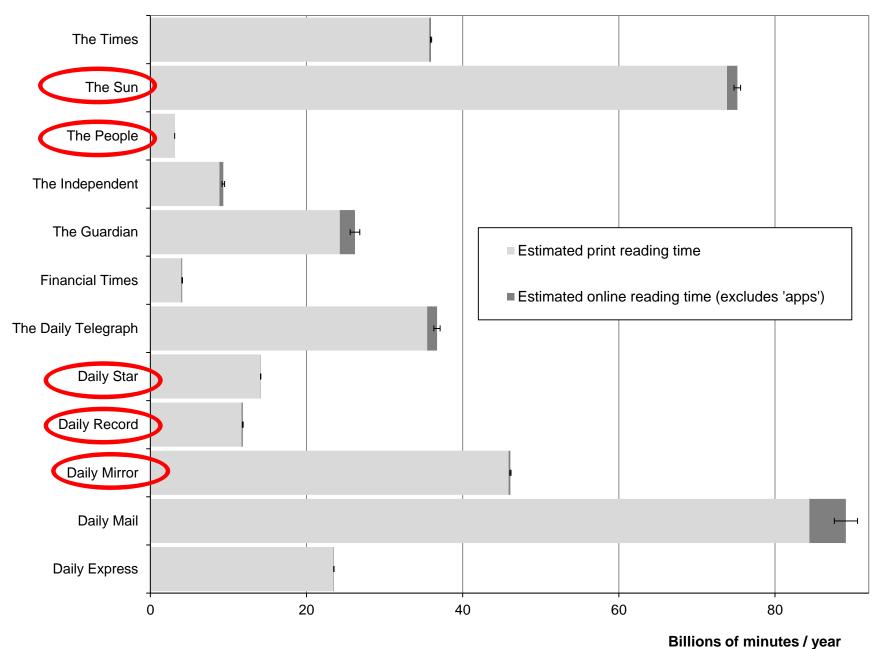


Results: Domestic Attention

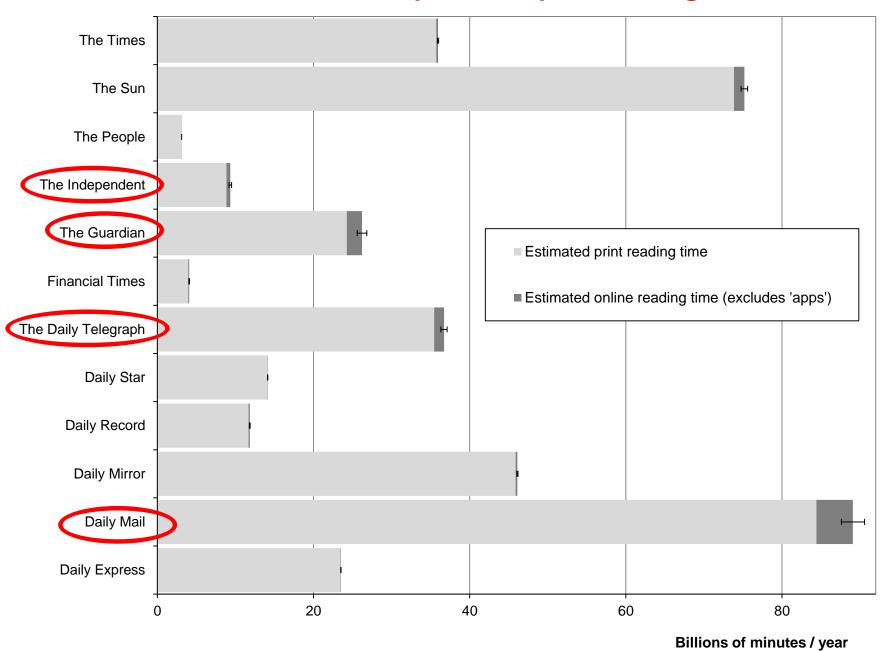
Time spent reading, 2011, 12 UK national newspapers



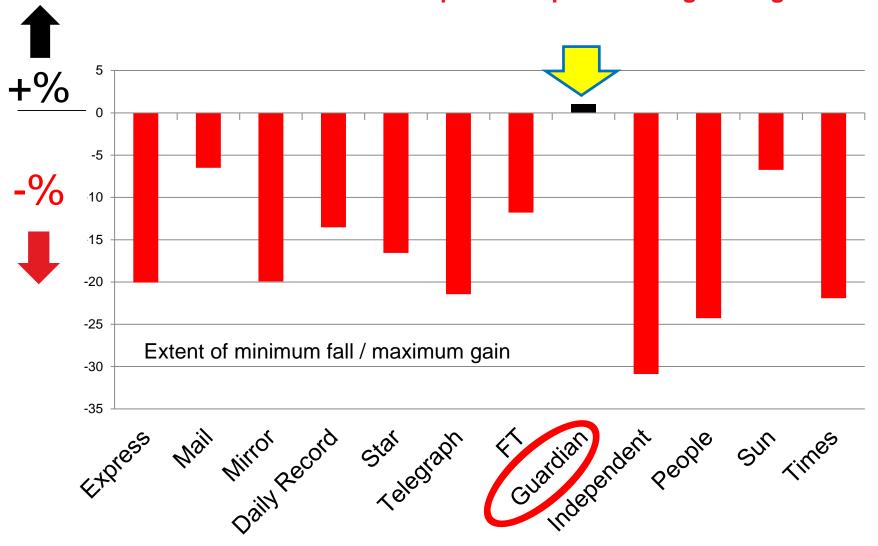
Results: Domestic Readership - time-spent-reading, 2011



Results: Domestic Readership – time-spent-reading, 2011



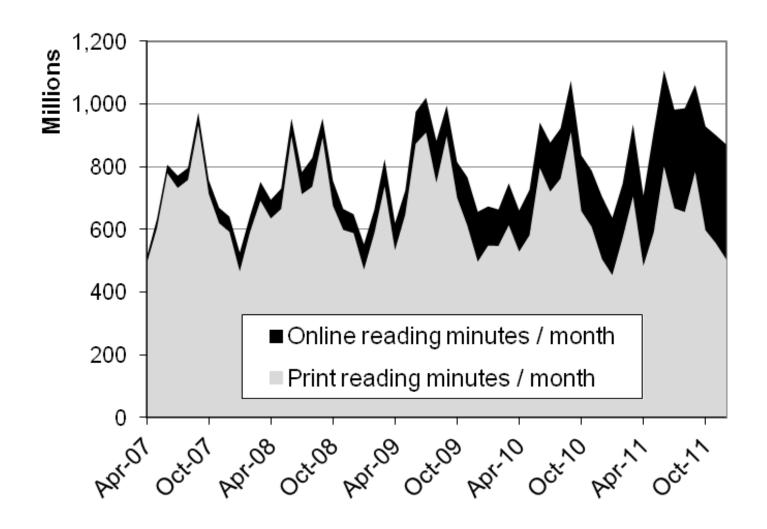
Domestic Print + Online Readership – time-spent-reading. Change 2007-11

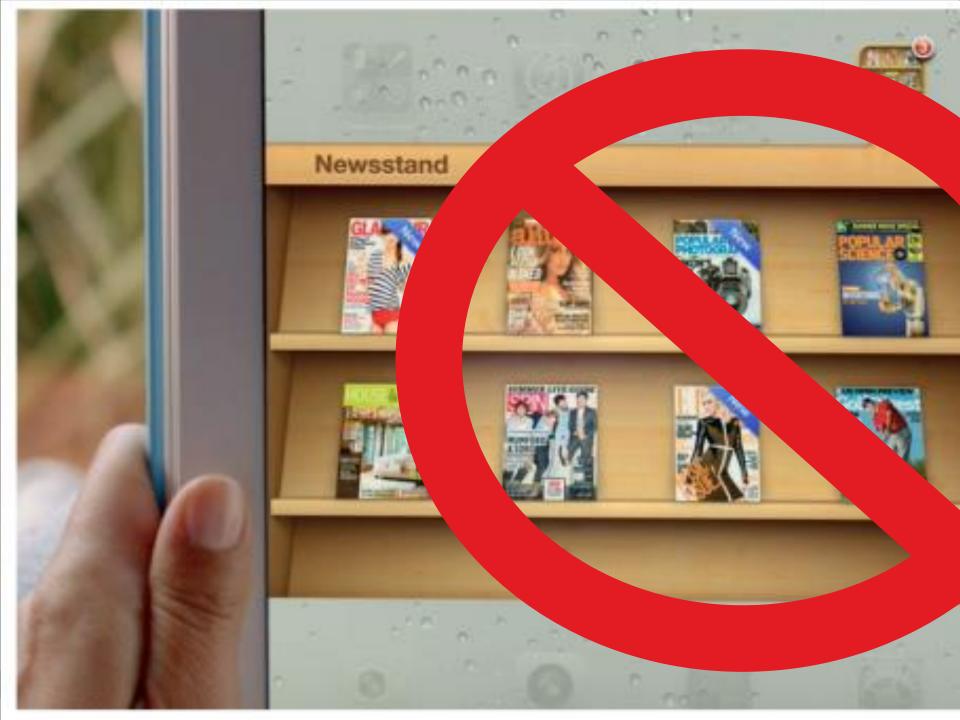


^{*}Due to the 2011 closure of the Sunday edition of *The Sun—The News of the World—*these figures relate to *The Sun*'s Monday–Saturday editions only.

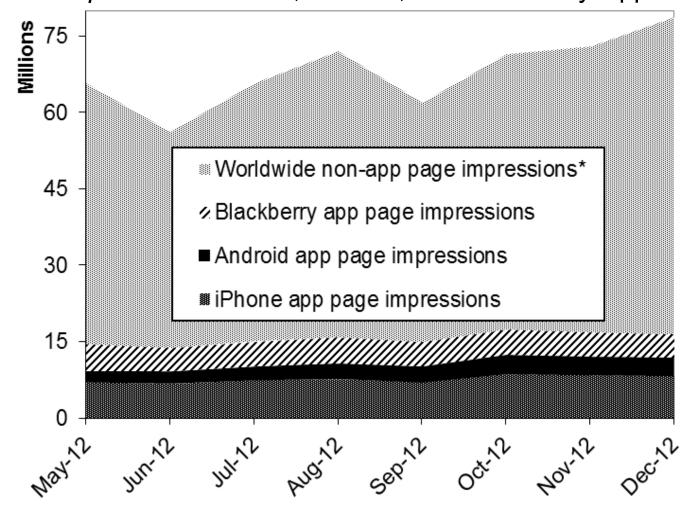
Overseas time-spent-reading (print & online)

The Daily Mail, The Mail on Sunday, and MailOnline



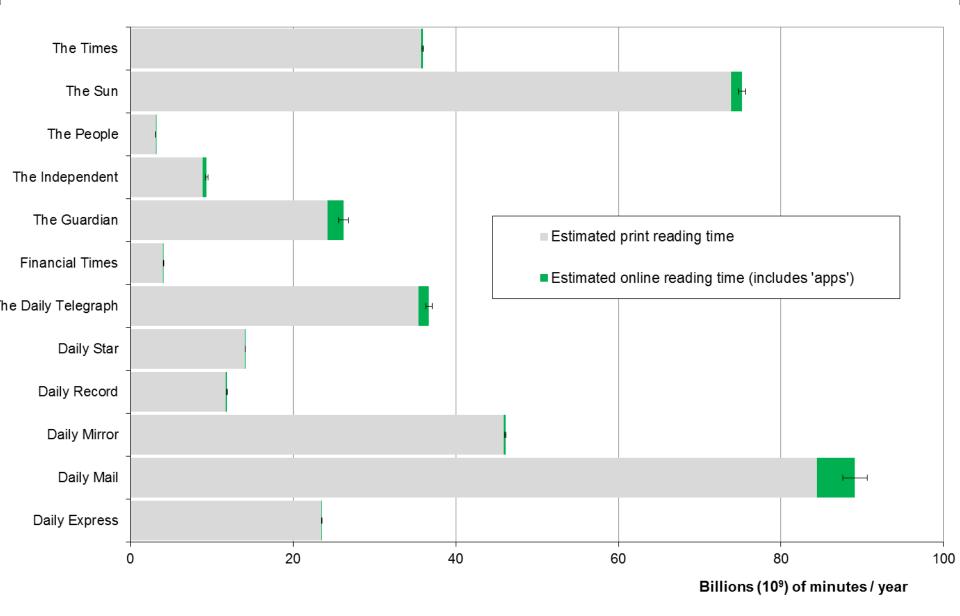


Comparison of monthly page impressions recorded by Independent.co.uk and *The Independent's* iPhone, Android, and Blackberry 'apps'

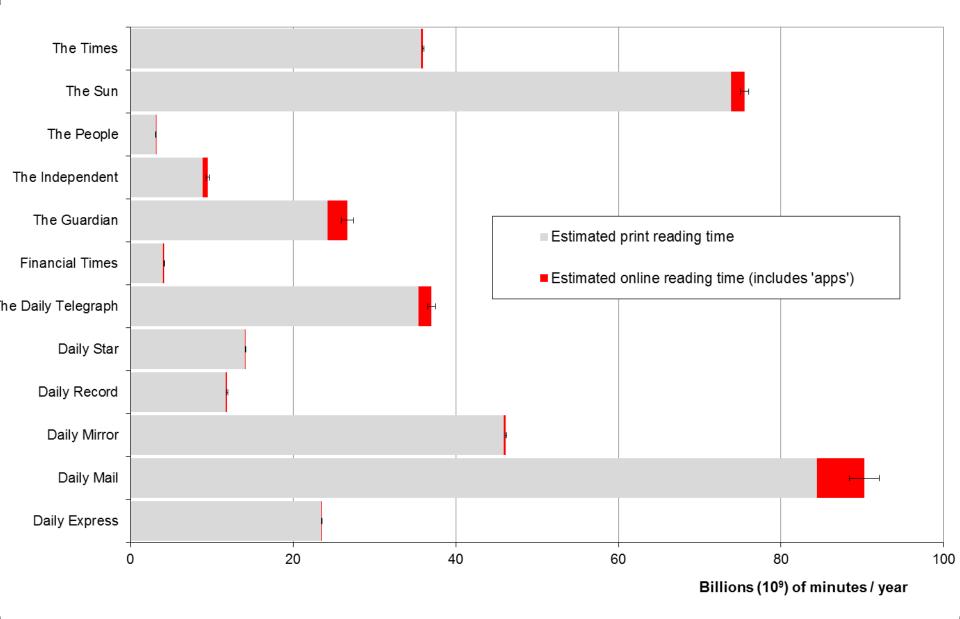


^{*} Excludes automated page impressions

Results: Domestic Readership – time-spent-reading, 2011 (no apps)



Results: Domestic Readership – time-spent-reading, 2011 (with apps, est.)





Conclusions

 Success of 'quality' newspapers (+Daily Mail) in reaching out to online readers



Conclusions

 Success of 'quality' newspapers (+Daily Mail) in reaching out to online readers

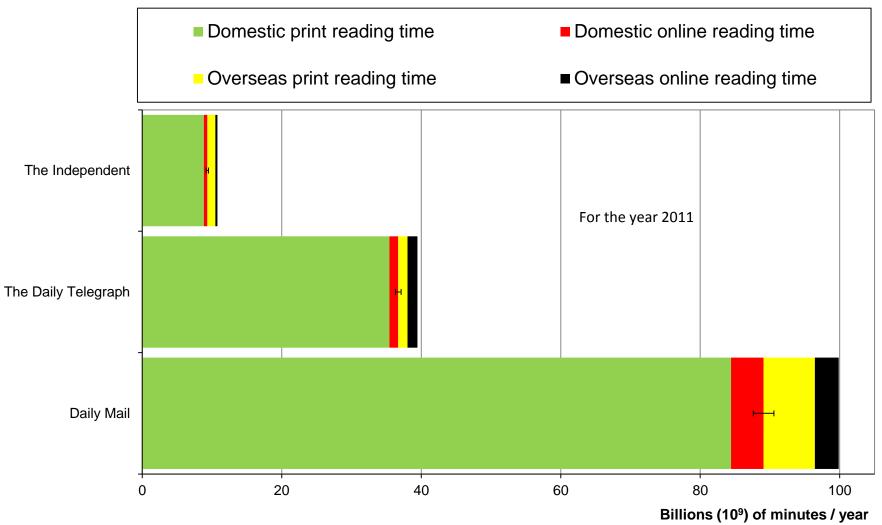
theguardian News Sport Comment Culture Business Money Life & style Travel Environment TV Data Video Mobile Offers Jobs **BUSINESS** Eurozone crisis live: UK refuses to contribute to €200bn IMF package of reddit this . €200bn IMF-EU loan shrinks to €150bn after Britain refuses to Comments (541) · Mario Draghi: no doubts about strength of euro Our selection of best buys German foreign minister: We have no hidden agenda against the Mortgages Credit cards Loans Savings City of London · Asian markets fall following Kim Jong-il's death 2 2 4 % Post Office 2 73% More See more mortgage best buys Get a personal quote A larger | smaller Moira Stewart can avoid top incom through her own private company More from Business Fly upstart Virgin, not the fat cats of BA'-Cameron policy guru's advice to ministe 7.30am: Good morning, and welcome to another day of rolling coverage European markets are forecast to open down in reaction to the news of More minute by minutes the death of Kim Jong-ii, the North Korean leader. Most Asia-Pacific markets have dropped sharply as expects warn that Kim's death could lead to civil unrest that could spark a crisis in the region. North Korea's military has been put on the highest state of alert. More on this story South Korea's Kospi index dropped 3.4% and Japan's Nikkei 225 fell 1.3% to 8.296.12. The Korean won fell 1.6% against the dollar. The FTSE 100 is expected to open down 69 points to 5,328 Guardian business journalists Follow the latest business news, comment and Meanwhile Mario Draghi, president of the European Central Bank (ECB). has breached the taboo of not countenancing a break-up of the eurozone. In an interview with the FT Draghi warned that struggling PuliaKollewe: Travelodge to be taken over by two of its creditors, New York hedge eurozone countries that leave the euro bloc would still face great nds Avenue and Golden Tree, which economic difficulties afterwards want to inject £60m #business Countries leaving the bloc and devaluing their currency would create "a big inflation" and still need to adhere to structural reforms, "but in a much olled over in first JuliaKollewe: Architect Terry Farrell to apply to demolish Battersea Power Station's side walls, replacing them with weaker position," he said. And, everyone is still expecting Standard & Poor's to downgrade Nick Cleag slams Ionnade - Building Design #business France's credit rating. France as Belgiun · This article was corrected on 20 December 2011 because the original described Sony Kapoor as working at Open Europe instead of Re-Furozone crisis fails Define, a London-based thinktank 8.10am: The FTSE 100 has opened down 30 points at 5,360 Joe Rundle, head of trading at ETX Capital, said: Read the latest business tweets from our team
 Follow our journalists on a Twitter list 66 It is a shorters' market and not much real long-term investing. I think it is going to be a negative week with very Everyone is talking about North Korea and the uncertainties, while Fitch had quite strong words in its Top 10 Retirement Tips - Special 16 statement. It does not look like anything is going to be solved in Europe until it is right on the brink. 20 Dec 2011 The pan-European FTSEurofirst 300 index of top shares was down 0.4% Jorth Korea - video The banks are among the biggest losers in the FTSE 100 following Vince Cable's announcement that he would "adopt in full" Sir John Vickers' proposal to "ringfence" retail banking from riskier investment banks Barclays dropped 1.9%, RBS is down 1.9%, Lloyds 1.8% and HSBC 1%. "Banks held too little capital in the good times - the danger now is that they will be forced to hold too much capital in bad times" Read Larry guardianinvesting 9.41am: It's another busy day in the fight to save the euro, here are 14:30 GMT: European finance ministers will hold a conference call with an aim to agree a new €200bn loan to the International Monetary Fund as part of a deal to save the single currency. The EU still expects the UK 2: JPM Natural Resources A Acc to contribute £25.9bn to the fund. 3: Jupiter Merlin Balanced Portfolio Acc 14:30: The ECB will announce last week's bond purchases. It has spent View all top selling lsas » €207.5bn on government bonds since its programme started in May last Benefit from tax-efficient savings with a stocks & shares Isa

15:30: George Osborne will address MPs on the Vickers' report into

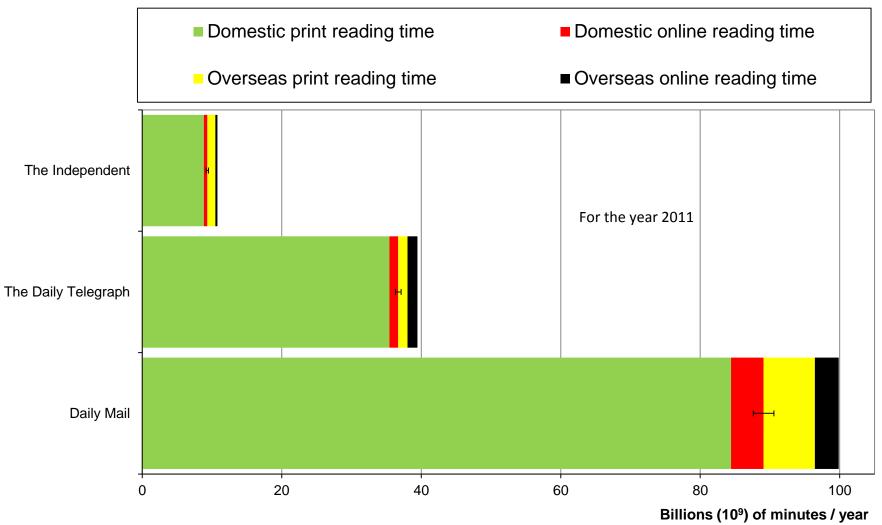
9.25am: Standard & Poor's has said it won't downgrade South Korea's

credit rating following the death of Kim Jong-II











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Key information

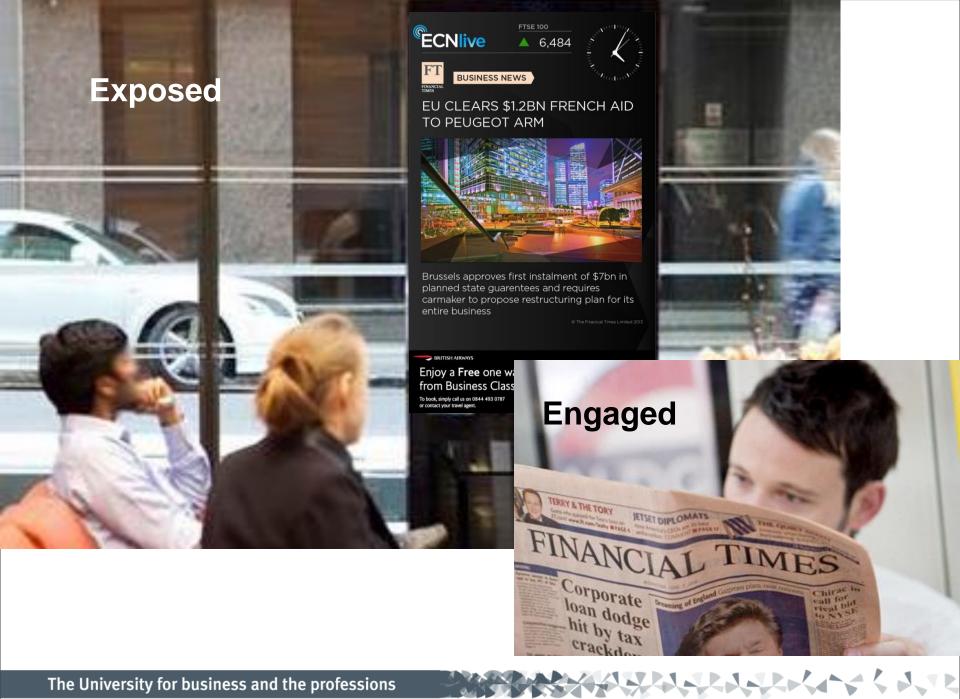
Certificate type Digital

Metric type

Worldwide traffic

Unique Browsers Page Impressions Daily average Monthly total 970,899 21,251,877

2,896,419 89,789,001





Thurman, Neil (2014) "Newspaper consumption in the digital age: Measuring multi-channel audience attention and brand popularity" *Digital Journalism* 2(2)