



2010 SUPPLEMENTARY REPORT

More than just a readership study

Integrated Newspaper Planning Model



Spring 2011

Newspapers have changed.....

....they are content generating organisations that distribute their content in print and digitally via a variety of electronic devices.

Advertisers and newspapers want single source, cross-platform data to better understand the full impact of a newspaper campaign.

Single source data.....

....provides valuable insight into the duplication of readership across platforms and the exclusive readership of each channel. Current media-mix models are based on random duplication and do not take into account the likelihood on one behaviour being related to another action.

NADbank is introducing a new planning tool, the Integrated Newspaper Planning Tool, which demonstrates whether or not reading a printed edition of a newspaper makes a person more or less likely to read the website version of the same, or different, newspaper.

The random duplication models are based on there being no relationship between the two behaviours.

Brave New World: A new way to look at newspapers and NADbank.....

This is an initiative, currently underway, designed to bring together the online and off-line products published by the newspapers.

This is a long-term project, with varying levels of complexity.

We must begin by exploring ways to bridge the two very different channels – the off-line print products and the digital online properties.

The Integrated Newspaper Planning Tool is a first step to thinking about how reach in one channel can be planned alongside the other in order to provide insight about the brand footprint for the newspaper as a multi-faceted entity.

The Integrated Newspaper Planning Tool:

1. It provides total daily and weekly reach across two different newspaper distribution channels.
2. The first single-source, cross-platform planning tool for Canadian media industry.
3. It provides the ability to look at a newspaper's brand footprint in the marketplace.
4. It allows users to more easily evaluate print products and website properties together in the planning stages of a newspaper campaign.
5. It is more flexible and more manageable than traditional models (silos) when evaluating duplicated and unduplicated reach of newspaper's properties.

What steps were taken to construct the Integrated Newspaper Planning tool?

1. Built reach curves for readership on newspaper websites (*2010 survey*).
2. Used a familiar planning tool to build an enhanced software tool (*Nielsen IMS R/F tool*).

THEN.....

3.introduce the new concept and tool to the media industry, and,
4. solicit feedback in order to better understand the needs of planners in order to build and integrate an appropriate tool into the Brave New World initiative.

Building a better mousetrap from two different distribution channels....

Print platform:

**a finite product
produced daily in
which each insertion
is assumed to reach
its target audience.**

Digital platform:

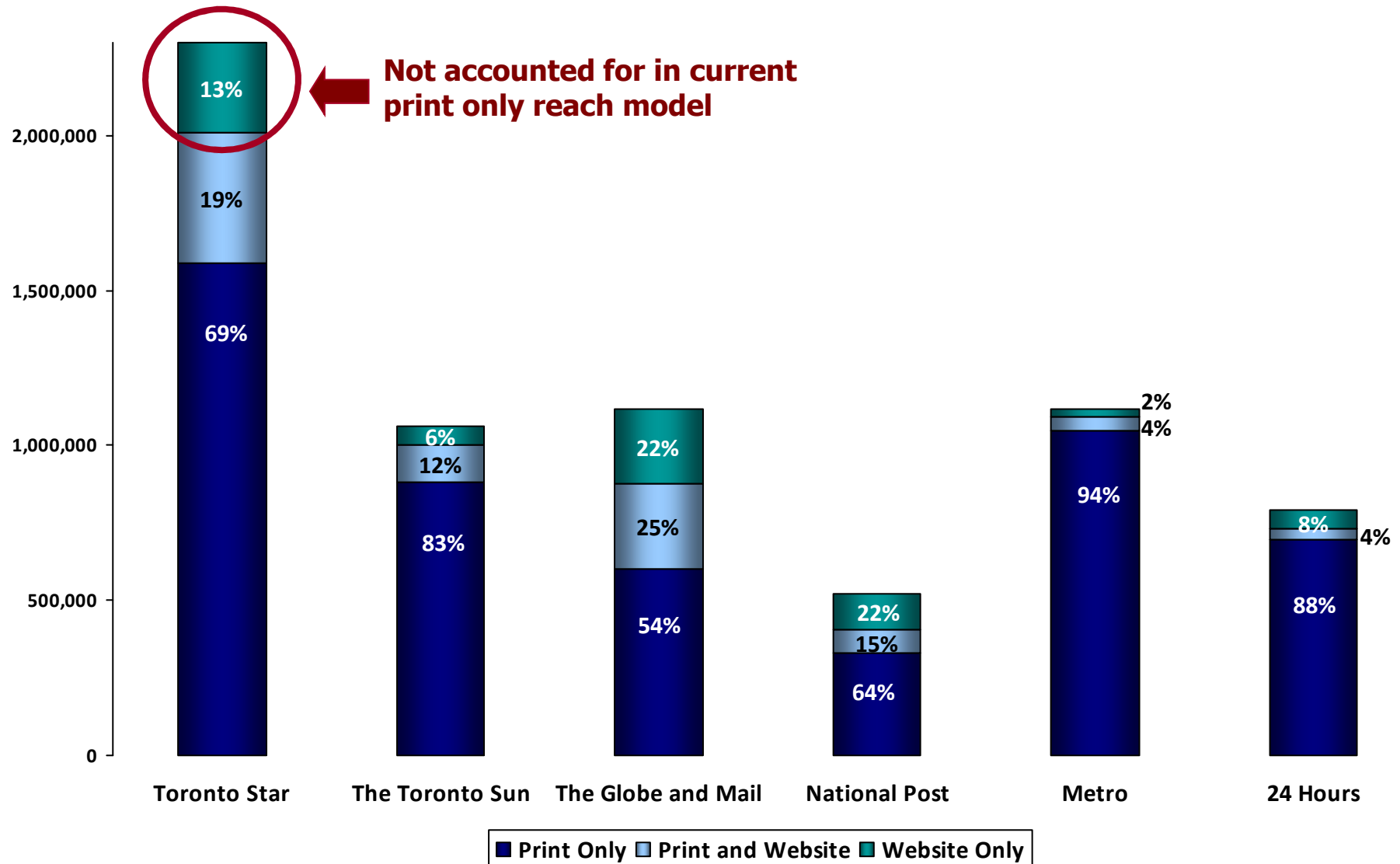
**fluid and always changing content
similar to a frequency medium in
which there is a lower chance of
each message reaching the
intended target.**

Reach in Toronto CMA

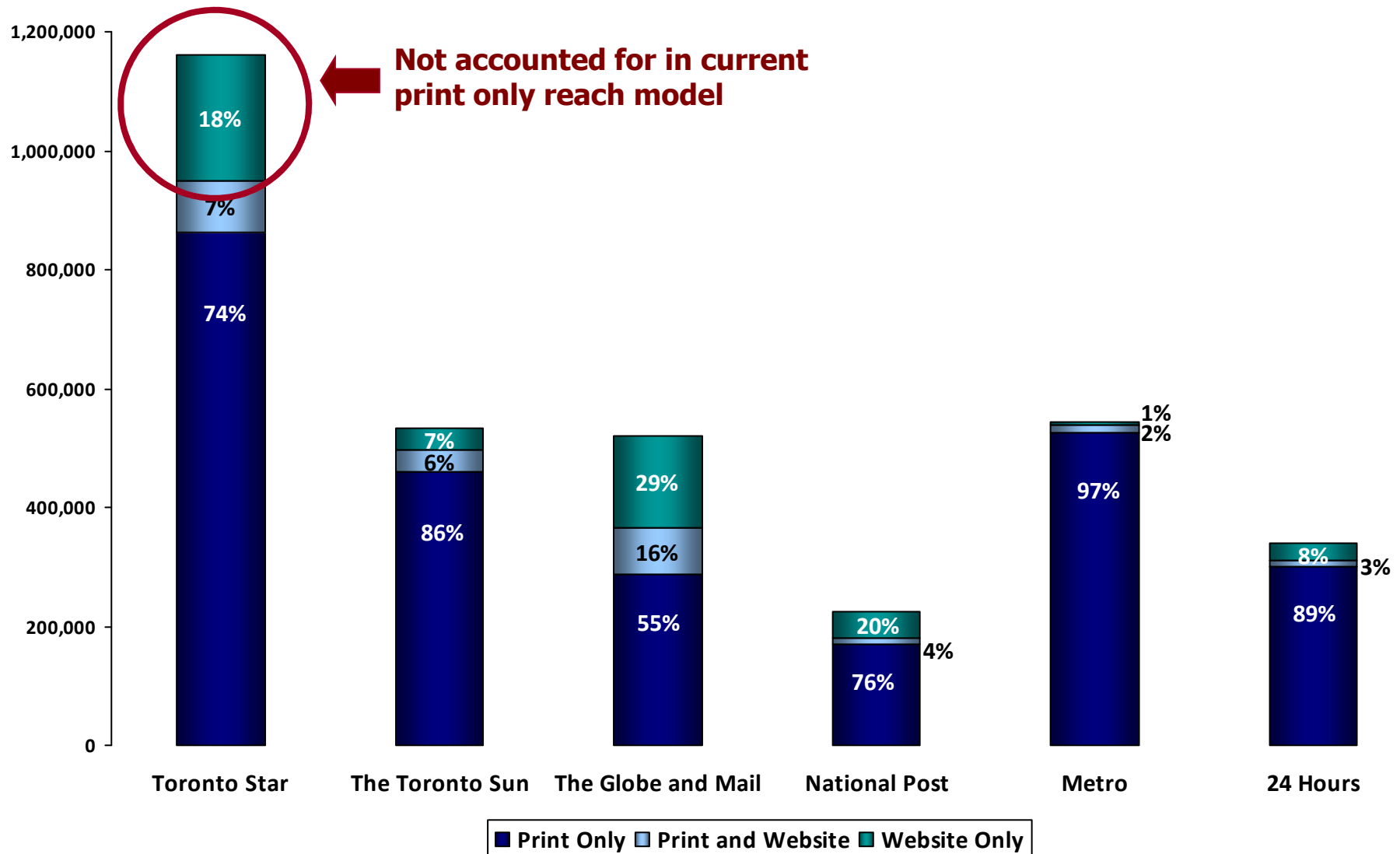
	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	44%	12%	2%	50%	70%	25%	10%	77%
Toronto Star	21%	7%		26%	45%	16%		51%
The Toronto Sun	11%	2%		12%	22%	4%		24%
The Globe and Mail	8%	5%		12%	20%	12%		25%
National Post	4%	1%		5%	9%	4%		12%
Metro	12%	<1%		12%	24%	2%		25%
24 Hours	7%	1%		8%	16%	2%		18%
canada.com			1%	1%			6%	6%
canoe.ca			2%	2%			5%	5%
cyberpresse.ca			-	-			<1%	<1%

Source: 2010 Supplementary Report, Adults 18+

Total Weekly Audience (*% of readers*) by Platform in Toronto – Available since 2001



Total Yesterday Audience (*% of readers*) by Platform in Toronto – *New for 2010*



How should the Integrated Newspaper Planning tool be used in conjunction with other planning tools?

THE IDIOSYNCRASIES OF EACH CHANNEL NEED TO BE DEALT WITH INDIVIDUALLY, but the cross-channel planning model allows buyers to see the full impact of utilising all newspaper properties in a single source, respondent based dataset.

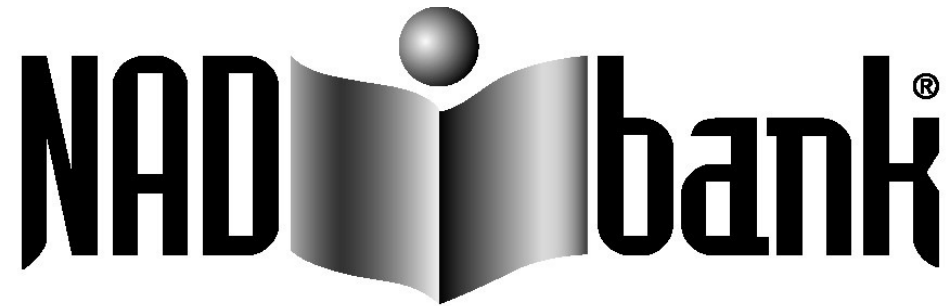
WHAT DATA TO INPUT INTO THE TOOL? Most media mix models employ the use of GRPs from each platform as input. This model requires placements: insertions for print and “day” for website.

Placements for the website can be adjusted, or scaled, to better reflect the frequency required to generate the same impressions as one would expect with a print insertion (after using Internet specific planning tools).

WHAT INFORMATION DOES THE TOOL PROVIDE? The top-line reach can be generated by employing these surrogates; more granular insights and campaign details of how to generate that reach via websites can be gleaned from the reach/frequency software available for the Internet platform.

Training and Resources

- NADbank and Nielsen IMS are available for training sessions on how to use this new software tool.
- Feedback from members on the tool and suggestions on future developments will provide NADbank with valuable insight on how to develop the Brave New World initiative.



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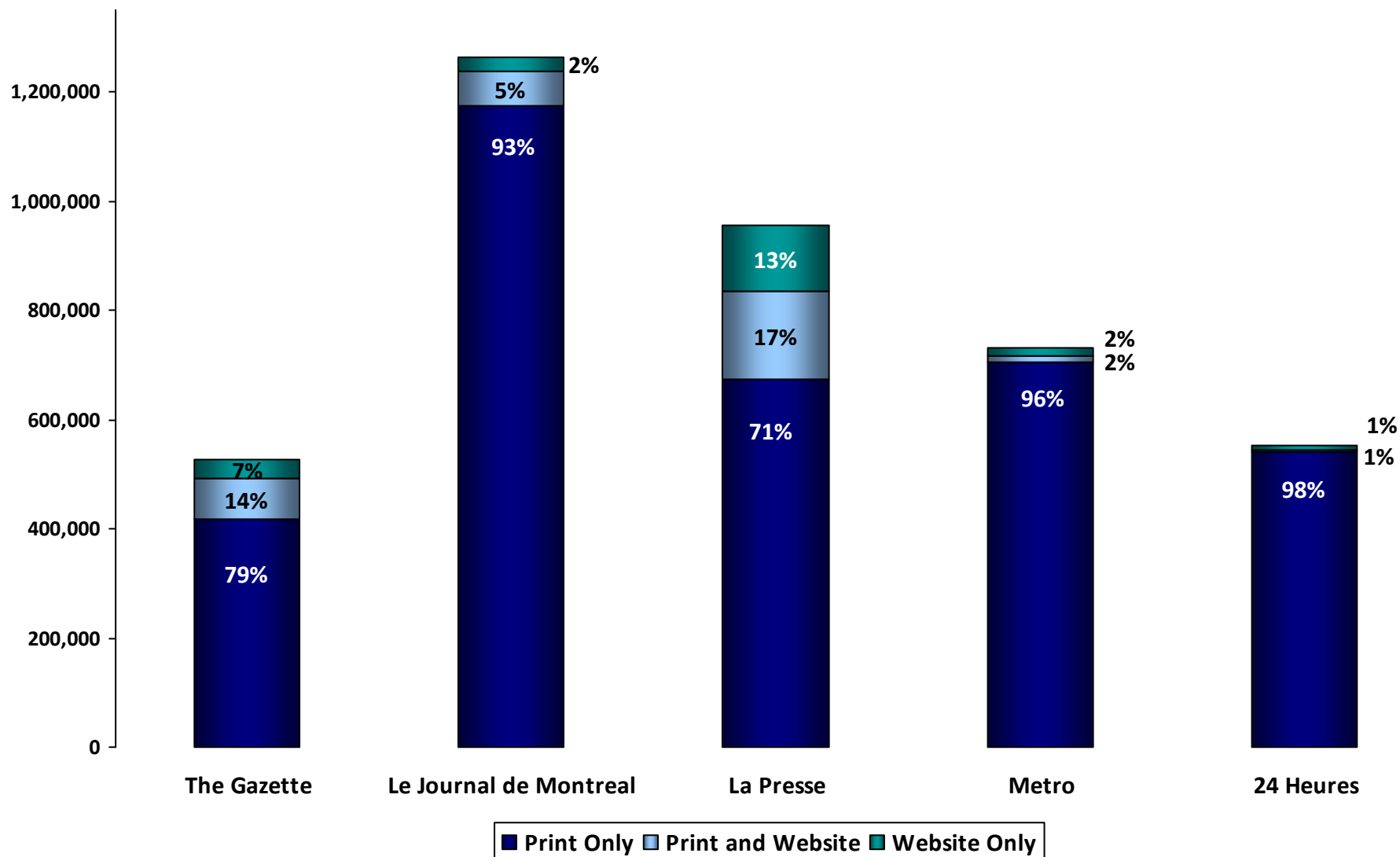
Detailed Tables by Market

Reach in Montréal CMA

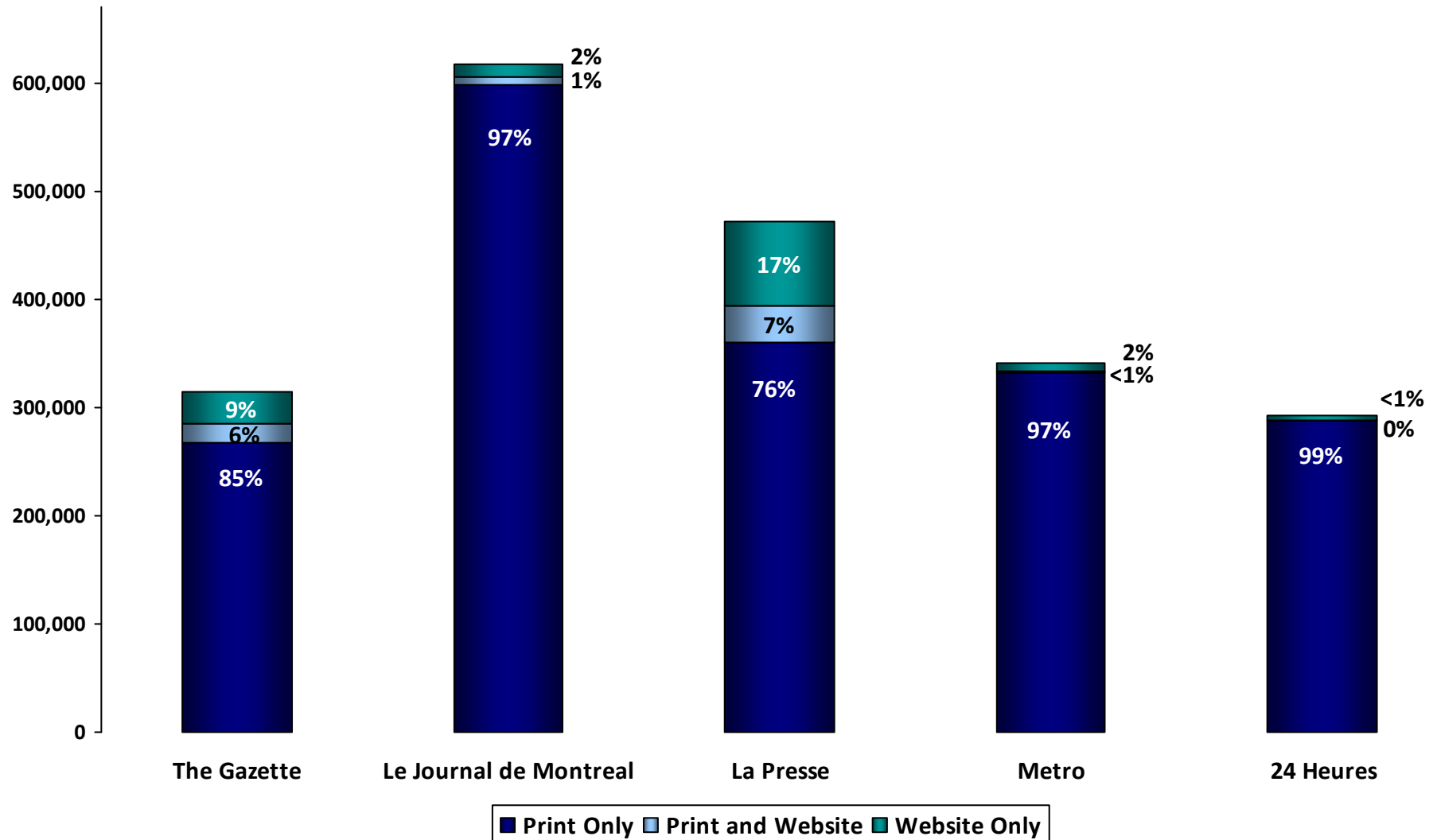
	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	48%	6%	13%	55%	75%	16%	30%	81%
The Gazette	9%	2%		10%	16%	4%		17%
Le Journal de Montréal	20%	1%		20%	40%	3%		41%
La Presse	13%	4%		15%	27%	9%		31%
24 Heures	9%	<1%		9%	18%	<1%		18%
Métro	11%	<1%		11%	23%	1%		24%
canada.com			1%	1%			4%	4%
canoe.ca			7%	7%			20%	20%
cyberpresse.ca			7%	7%			14%	14%

Source: 2010 Supplementary Report, Adults 18+

Weekly Audience (*% of readers*) by Platform in Montréal – Since 2001



Yesterday Audience (*% of readers*) by Platform in Montréal – New for 2010

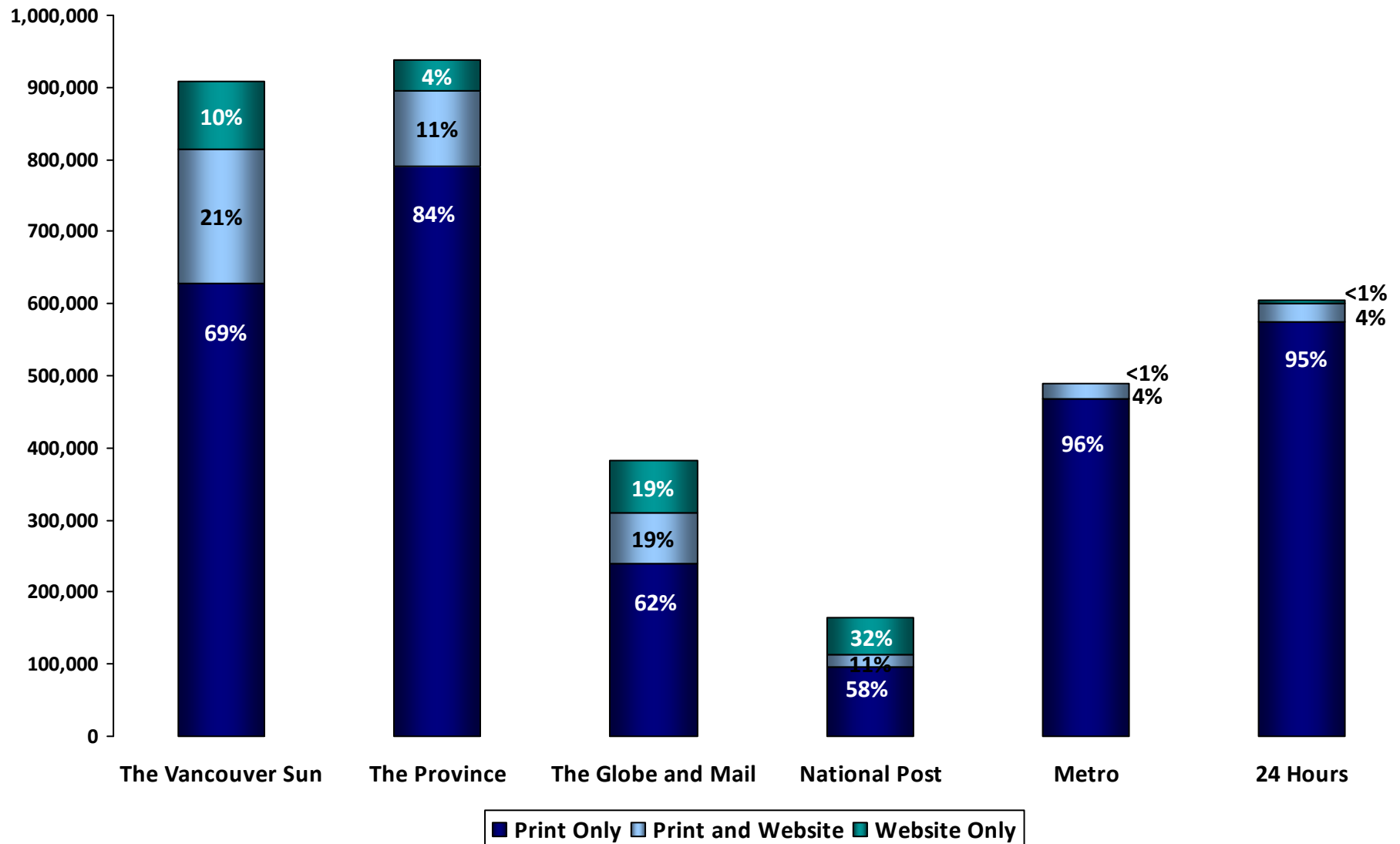


Reach in Vancouver CMA

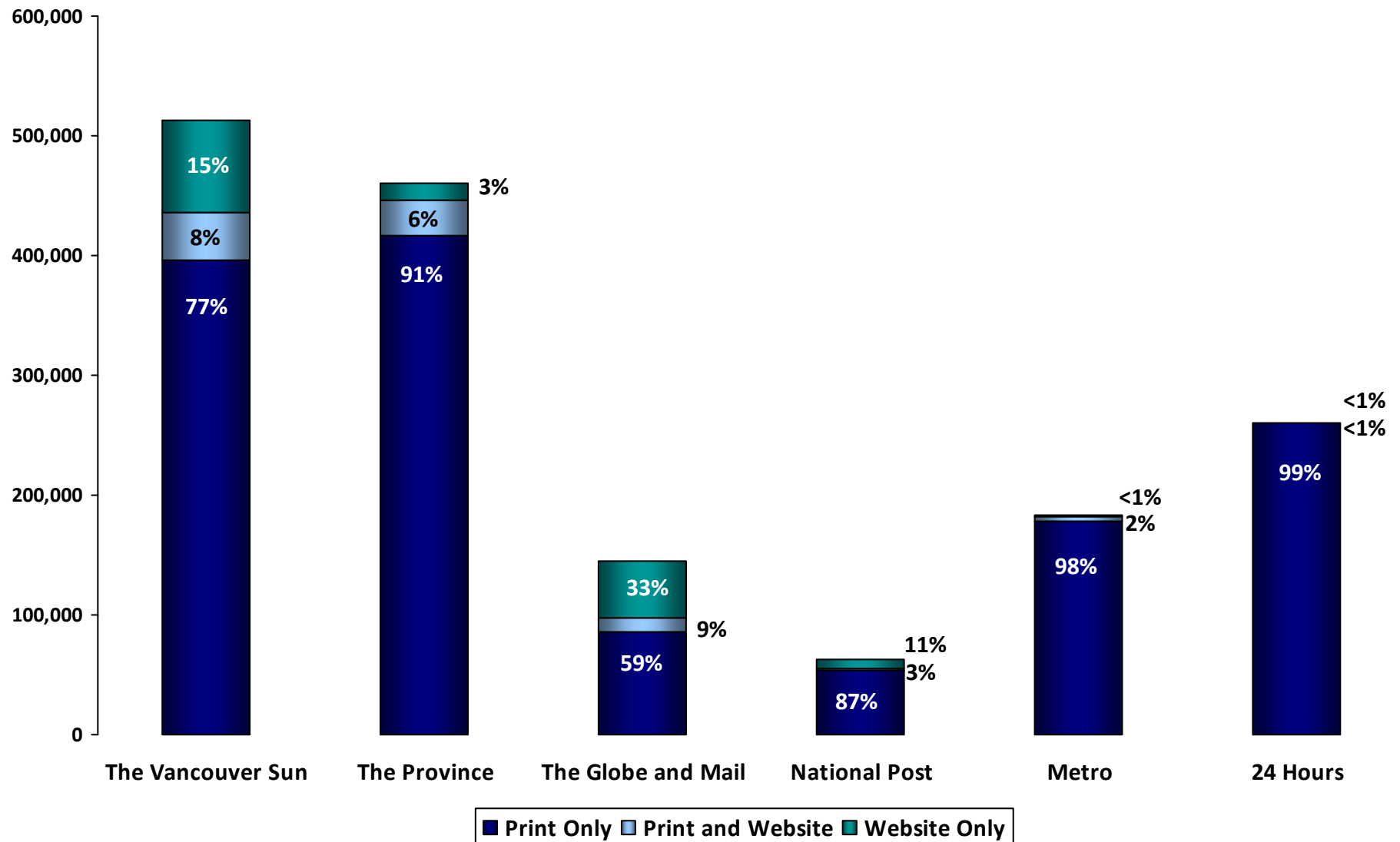
	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	51%	10%	4%	56%	77%	23%	11%	82%
The Vancouver Sun	23%	6%		27%	43%	15%		48%
The Province	23%	2%		24%	47%	8%		49%
Metro	10%	<1%		10%	26%	1%		26%
24 Hours	14%	<1%		14%	32%	1%		32%
The Globe and Mail	5%	3%		8%	16%	8%		20%
National Post	3%	<1%		3%	6%	4%		9%
canada.com			3%	3%			10%	10%
canoe.ca			<1%	<1%			2%	2%
cyberpresse.ca			-	-			<1%	<1%

Source: 2010 Supplementary Report, Adults 18+

Weekly Audience (*% of readers*) by Platform in Vancouver – Since 2001



Yesterday Audience (*% of readers*) by Platform in Vancouver – *New For 2001*



Reach in Ottawa-Gatineau CMA

	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	51%	14%	6%	58%	75%	26%	19%	83%
Le Droit	10%	1%		12%	17%	4%		19%
Ottawa Citizen	26%	7%		30%	46%	18%		51%
The Ottawa Sun	15%	4%		17%	30%	8%		33%
Metro	8%	<1%		9%	23%	2%		23%
24 Hours	6%	1%		6%	16%	1%		16%
The Globe and Mail	8%	4%		10%	17%	8%		21%
National Post	2%	1%		3%	6%	3%		8%
canada.com			2%	2%			7%	7%
canoe.ca			3%	3%			10%	10%
cyberpresse.ca			3%	3%			6%	6%

Source: 2010 Supplementary Report, Adults 18+

Reach in Calgary CMA

	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	45%	15%	4%	53%	73%	26%	12%	79%
Calgary Herald	29%	9%		35%	50%	18%		57%
The Calgary Sun	16%	5%		19%	38%	9%		41%
Metro	9%	<1%		10%	22%	2%		23%
24 Hours	3%	<1%		3%	10%	1%		10%
The Globe and Mail	4%	4%		7%	12%	7%		15%
National Post	2%	1%		3%	7%	4%		10%
canada.com			2%	2%			8%	8%
canoe.ca			2%	2%			6%	6%
cyberpresse.ca			-	-			-	-

Source: 2010 Supplementary Report, Adults 18+

Reach in Edmonton CMA

	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	46%	11%	4%	52%	74%	24%	11%	78%
Edmonton Journal	29%	6%		32%	50%	16%		54%
The Edmonton Sun	18%	3%		20%	39%	9%		41%
Metro	7%	<1%		7%	19%	1%		20%
24 Hours	4%	<1%		5%	13%	1%		14%
The Globe and Mail	4%	3%		6%	11%	5%		14%
National Post	2%	1%		3%	7%	3%		9%
canada.com			2%	2%			7%	7%
canoe.ca			2%	2%			6%	6%
cyberpresse.ca			-	-			-	-

Source: 2010 Supplementary Report, Adults 18+

Reach in Halifax CMA

	Yesterday				Last Week			
	Print	Websites	Hubs	<i>Total</i>	Print	Websites	Hubs	<i>Total</i>
Any Paper	58%	14%	2%	63%	79%	28%	5%	83%
Chronicle Herald	45%	11%		50%	67%	23%		72%
Metro	20%	1%		20%	49%	6%		52%
The Globe and Mail	7%	4%		10%	21%	4%		24%
National Post		1%		1%		2%		2%
canada.com			1%	1%			3%	3%
canoe.ca			1%	1%			2%	2%
cyberpresse.ca			-	-			-	-

Source: 2010 Supplementary Report, Adults 18+

Sample Runs

Simple plans were input and reach generated to demonstrate the impact of using both print insertions and a “day” on a website or hub.

Print platform:

a finite product produced daily in which each insertion is assumed to reach its target audience.

Digital platform:

fluid and always changing content similar to a frequency medium in which there is a lower chance of each message reaching the intended target.