

NEWSPAPER SELECTION: Optimization through Geographic Analysis

Luminosity Perspectives

January 2008

Overview

In large markets with many newspapers, determining the optimal combination of publications can initially appear to be a daunting puzzle. However, by examining variations in target and geographic coverage, the best combination of publications can be made clear. Even within a single metro area, coverage and circulation of publications can differ greatly by county. The consideration of delivery by county can be a key aspect of efficient, effective media planning and buying.

To demonstrate, we examine the New York marketplace, which has one of the largest varieties of newspapers. A publication that holds a dominant role in one county may be marginal in other counties. An analysis by county can uncover these variations and facilitate an otherwise complex choice.

Resources for Analysis by County or Zip Code

To find the numbers on circulation and demographics by county for newspapers, one may employ a number of resources. Newspapers themselves can often provide this information. In addition, compiled data can be found in a media resource such as the annual Circulation Service released by Standard Rate and Data Service (www.srds.com). Circulation compiles the information gathered by the Audit Bureau of Circulations, an organization that monitors newspaper circulation on a six-month basis.

While it is also possible to obtain the data through an ABC subscription directly, SRDS Circulation organizes the data for easy analysis.

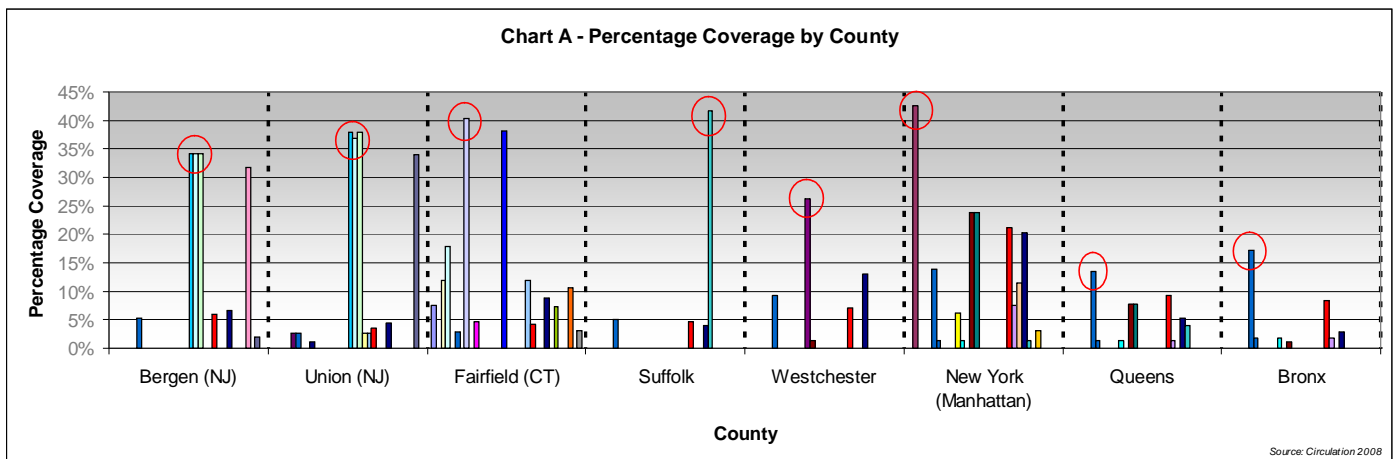
Sometimes more granular analysis is needed. In those cases, most newspapers are able to provide a breakdown of their circulation by zip code.

Methodology

To illustrate the advantage of examining newspapers on a geographic basis, we selected a sample set of counties within the New York market and examined them both independently and as a whole. The disparity between aggregate and individual county coverage is remarkable for some publications.

With the number of households in each county and the circulation of each newspaper available in that county, each publication's share of coverage is determined. That percentage of coverage represents a newspaper's weight in a specific area.

Chart A details the newspaper coverage for eight of the 29 counties in the New York DMA: Bergen (NJ), Union (NJ), Fairfield (CT), Suffolk, Westchester, New York (Manhattan), Queens, and Bronx. These counties were chosen as a sample set because they draw from all regions of the New York DMA, and therefore provide an approximate snapshot of the market as a whole.



It is clear from Chart A that coverage varies considerably from one county to the next. To look only at the totality would be to lose the intricacies of regional readership that are uncovered with a more thorough analysis.

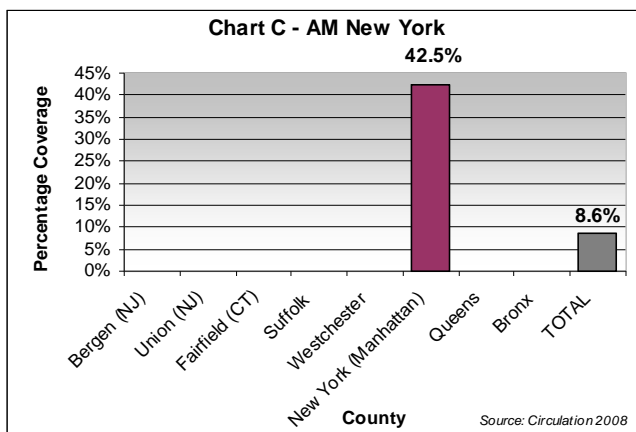
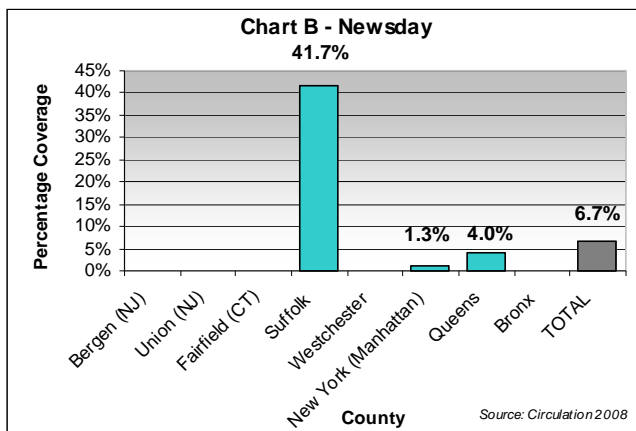
Revelations of Geographic Analysis

One of the most important observations of a geographic analysis of newspaper coverage is the tendency for the market-wide circulation numbers to paint an inaccurate picture of publication reach.

In our NY sample analysis, some publications falsely appear to be necessary vehicles to generate reach in the New York market because their dominance in one locale skews the numbers. However, they may be completely ineffective in reaching a particular marketer's target or trade area.

Consider Newsday, a daily tabloid-size newspaper from the Tribune Company. Newsday has 6.1% of the NY DMA, and 6.7% of our eight sample counties. While this does not make the publication a dominant force, the numbers are certainly respectable.

But upon closer inspection, it is evident that Newsday only has coverage in three of the eight counties (see Chart B). Further, with only 1.3% coverage in New York County (Manhattan) and 4.0% coverage in Queens, Newsday would be ineffective in reaching these counties. In contrast to these modest numbers, Newsday has an overwhelming presence in Suffolk country, where it enjoys 41.7% coverage.



Similarly, AM New York, another Tribune Company publication, has coverage of 4.6% for the New York market as a whole, and 8.6% for the eight sample counties. Though the publication seems to be a good choice to reach all of the NY market initially, analysis by county reveals that AM New York's percentage of coverage of the sample set is entirely drawn from its enormous presence in New York County (Manhattan), where it has coverage of 42.5%. It has no share of voice in any of the other seven counties.

Newsday and AM New York's higher levels of coverage for all eight counties, then, owe almost entirely to their dominance in only one county each. Buying Newsday or AM New York for the New York market is not an effective means of reaching a widespread group of people. Rather, they are only an effective way to reach people in Suffolk County and New York County (Manhattan), respectively. They may also be an effective addition for a marketer looking to "fill" coverage to areas not reached with an existing newspaper plan.

Counties in the NY DMA	
County	Population
Bergen, NJ	906.3
Bronx	1372.8
Dutchess	298
Essex, NJ	788.5
Fairfield, CT	906.6
Hudson, NJ	601.1
Hunterdon, NJ	132.3
Kings	2507.3
Manhattan (NY)	1617.4
Middlesex, NJ	799.1
Monmouth, NJ	639.7
Morris, NJ	496.1
Nassau	1330.1
Ocean, NJ	568.7
Orange	380.1
Passaic, NJ	500.3
Pike, PA	59.3
Putnam	101.3
Queens	2255.3
Richmond	478.3
Rockland	293.6
Somerset, NJ	625.7
Suffolk	1483.4
Sullivan	77.5
Sussex, NJ	155.1
Ulster	184
Union, NJ	533
Warren, NJ	111.8
Westchester	942.6

The issue of localized versus widespread distribution within a market is something that bears investigation for any marketer considering advertising in newspaper.

Implications and Applications

There are unlimited potential uses for a geographic analysis of newspaper coverage, but let's look at a few samples to illustrate its utility.

1. A coverage-by-county newspaper analysis is critical for an advertiser with a concentrated geographic trade footprint, such as a retail store, franchise, or auto dealership. If an advertiser has locations in certain counties within a market and not others, newspaper planning and buying should take into account any deviations in circulation for specific counties. In New York, a retailer with outlets in Suffolk County would be well served by purchasing space in Newsday. However, Newsday would be a poor choice for a marketer with stores in Bergen County (NJ) or the Bronx, despite being the one of the largest papers in the overall market.

2. Analysis of geographic coverage is a very valuable tool for clients with specific demographic and psychographic targets including ethnic, lifestyle, lifestage, income and home ownership.

New York’s Dominant Newspapers

- Advocate (Stamford, CT)
- AM New York
- Bridgeport/Fairfield County USSPI Group
- Connecticut Post (Bridgeport, CT)
- Courier News (Bridgewater, NJ)
- Daily News (New York, NY)
- El Diario La Prensa (New York, NY)
- Fairfield County Dailies
- Home News Tribune (East Brunswick, NJ)
- Hour (Norwalk, CT)
- Hoy (New York, NY)
- Impremedia LLC
- Journal News (White Plains, NY)
- Metro New York
- Metro USA
- NENA Ad Network CT Buy
- New Jersey Newspaper Network
- New Jersey Newspaper Network Northern NJ Buy
- New Jersey Newspaper Network NY-DMA (NJ Co) Buy
- New Jersey USSPI Group
- New York DMA USSPI Group
- New York Post (NY)
- New York Press Service
- New York Sun
- New York Times
- Newsday (Mellville, NY)
- News-Times (Danbury, CT)
- Nowy Dziennik – Polish Daily News
- Record (Bergen Passaic, NJ)
- Southern CT Newspapers, Inc.
- Star-Ledger (Newark, NJ)
- Time (Greenwich, CT)

Regional targeting is familiar to some industries, such as ethnic products or real estate. However, it is valuable for a much wider set of industries. For example, automotive-related products can commuter counties or home improvement products can target areas with high home ownership.

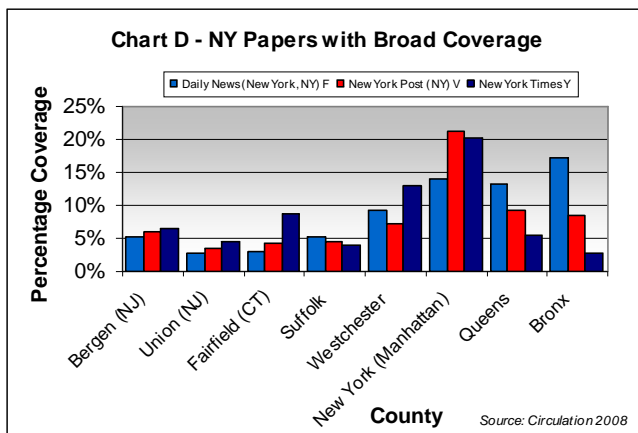
By combining specific coverage information with demographics for certain counties, media could be planned to pinpoint a subset of the population. Coverage analysis can also be linked to segmentations based on Claritas’ PRIZM, CACI’s ACORN, and Donnelley’s ClusterPLUS.

3. Analysis of coverage by geography is not simply a tool for narrowing media focus in newspaper. It can also be used to identify the newspaper(s) with the greatest breadth and the most even coverage of a given area. Below in Chart D, we see that only three of the newspapers we considered have significant coverage in all eight of the counties selected: The Daily News, The New York Post, and The New York Times.

This sort of information could prove especially useful to a company trying to build a brand or generate buzz. By identifying the vehicles that have coverage in the largest portion of a given area, an advertiser can ensure that their message covers the largest audience possible.

4. Statewide initiatives that encompass more than one newspaper market could streamline their efforts by identifying the papers that “spill” circulation into nearby markets. Geographic analysis will also determine if a proposed media plan skews appropriately to urban, suburban or rural areas. This is especially essential for publicly-funded or political initiatives.

5. Geographic analysis is also a necessary evaluation tool for cooperative advertising efforts, such as those from franchisee or dealership groups. For example, from Chart D it is apparent that although broad, an effort using these three papers would still skew to Manhattan. A cooperative advertising group with members in Union and Bergen counties might need to consider a New Jersey paper such as the Bergen Record to bolster reach in those counties. Geographic analysis insures each contributing member receives coverage of their trade area.



Markets Requiring Geographic Analysis

The sort of analysis explored above is certainly not limited to the New York market. New York provided an ideal example for such an exercise because it is a large, multi-newspaper market. But marketers targeting any major metropolitan area— especially marketers in markets with multiple dailies, such as Chicago, Boston, or Raleigh-Durham — would benefit from a thorough geographic circulation analysis.

Geographic newspaper circulation analysis is an essential tool to improve the efficiency and effectiveness of newspaper selection for marketers from Newark to North Carolina.

About Luminosity Marketing

Luminosity Marketing provides media consulting and marketing research services. We specialize in connection planning, including target development, competitive intelligence, touchpoint mapping, media planning and media buying. Analysis for this edition of Luminosity Perspectives by Jonathan Evans, Media Coordinator.

To request a custom analysis for your target and market, please call Elizabeth Dolinski at 646-213-4862.

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