

The era of "cross-platform" media and its impact on the market

CASE STUDY: A PROFILE OF ALBANIAN DAILIES IN THE FACEBOOK SOCIAL NETWORK

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A. ALBANIAN MEDIA MARKET

The Albanian media market is clearly dominated by the electronic media outlets, and particularly by the television broadcasting networks, while the daily and periodical print circulation figures continue to plummet. In addition to RTSH (ART, Albanian Radio Television) or Public Service Broadcasting, there are another two commercial privately-owned operators licensed for nationwide analogue television broadcasting, 75 local TV stations, 70 cable service providers, as well as two digital terrestrial and satellite broadcasting services. Additionally, there are three FM radio broadcasting stations airing their programs nationwide and 68 other local FM radio stations.

While the most recent data indicates that there are 23 national daily titles in the market, the actual number of periodical press titles is almost impossible to report, mostly because of the short lifespan of many new titles entering the market, due to their poor financial performance and the market's inadequate infrastructure, as well as the global financial crisis footprint on the Albanian media market impacting their very business model. The estimated total daily circulation for all Albanian newspapers and magazines does not exceed 70 thousand copies, while only one or two of the major national print daily titles manage to sell around 15,000 to 25,000 copies, while the vast majority is reportedly selling not more than 5 thousand copies.

B. ADVERTISING MARKET

While television is still gaining the lion's share of advertising spending pie, there is reportedly a growing fragmentation of the audience, which prefers to be informed or entertained via new media channel formats, mainly the online digital platforms, as well as the online social networks. Data reports based on industry expert audience research studies suggest that the role of TV as a medium for catering to mass audiences is declining, which indicates significant changes expected to occur soon to the media advertising spending budgets, and consequently, reflecting structural shifts in the business model framework of the media outlets.

Albanian media advertising expenditure time-series data (Table 1) indicate that *Outdoor*, along with *Online* media are two of the platforms that have witnessed the biggest growth rate as media business models, primarily thanks to their comparatively lower costs for reaching the so much sought after mass audiences by any advertiser. Despite the fact that outdoor media audience data are generally scarce and difficult to collect, we are only too aware as consumers being canvassed in our everyday life by an incredible frequency of messages from billboards, city lights or bus shelters advertising products or services of major mobile communication companies, banks or automotive brands. Additionally, the increased use of

the Internet as a communication tool, due to the reported rapid penetration levels, as well as the time spent online by a considerable part of an important target group for advertisers, such as the younger demographics, provides for fairly affordable and preferable advertising opportunities for companies currently operating in Albania.

Table 1. – Advertising Market Time-Series Spending Data in Albania, 2004-2011

| Media | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|-------------|-------------|--------------|--------------|--------------|-------------|-------------|--------------|
| Television | 86.3% | 81.1% | 78.2% | 63.6% | 63.8% | 68.7% | 65.4% | 66.8% |
| Radio | 1.2 | 1.4 | 1.2 | 1.4 | 1.4 | 1.3 | 1.4 | 1.4 |
| Press | 6.4 | 8.1 | 5.8 | 20.1 | 17.8 | 8.5 | 10.7 | 8.5 |
| Outdoor | 6.1 | 9.4 | 14.3 | 15.6 | 17.4 | 21.8 | 20.8 | 22.4 |
| Cinema | na | na | na | na | na | na | na | na |
| Internet | na | na | na | 0.5 | 0.8 | 1.1 | 0.9 | 0.9 |
| Ad Market (€ million) | 14.5 | 19.8 | 24.38 | 27.18 | 42.23 | 49.3 | 57.4 | 54.34 |
| <i>Source: Abacus Research, November 2012</i> | | | | | | | | |

The latest data from the last quarter of 2012 generally points to a shrinking advertising market, facing a decrease of down to 16-18% as compared to the same period of 2011. Meanwhile, the forecast for 2013 will need to take into account the fact that being ahead of an election year, the expected campaign spending will certainly affect significantly the general media advertising spending, possibly reaching the levels of the period 2009 -2010, i.e., at about 50 million euro.

C. MEDIA AUDIENCE MEASUREMENT

Despite the current advertising media market's slowdown, mainly as a consequence of the global economic downturn, the significant increase of the advertising budgets in recent years, that witnessed the entry of other major institutional advertisers in the market (primarily in the telecommunications industry, the financial and banking market, as well as the retail sector), has raised the bar in terms of ever-growing accountability standards of advertising media performance, that need to also match the highly-sophisticated marketing techniques of the competition. In this view, the media audience measurement data are generally collected to cater to the needs of the following three major groups of players in the advertising market, whose primary operational activity - that is, buying and selling of advertising space / time - is strongly linked to the measurement of viewership (in the case of the television), listenership (in the case of radio) and readership (in the case of press) data:

1. Television and Media Groups

Calculation of the Financial Value for the TV Commercial Air Time. Through the TAM data (viewership ratings), televisions and media groups can have the possibility to efficiently calculate their air time monetary value available for advertising. (The same concept and methodology applies also to selling/buying ad space on print media, however, this is out of

this document's scope). This is the main responsibility in the activity of TV's marketing and sales departments, as well as their finance departments.

Programming Content Quality & Competitive Advantage. Additionally, the TV programming departments are deeply interested in getting their programs' viewership data, with the clear objective of designing a successful programming structure that would help them in winning the battle against other competitive television in the market.

2. Advertising Agencies and Media Service Agencies (Media Agencies)

TAM ratings data make up the cornerstone information, upon which they build the whole activity of the media service departments within advertising agencies and media-buying services, for:

designing the media plans for spending the advertising budgets and the allocation of their clients' budgets for different ad campaigns in television.

processing the media and marketing research reports.

3. Major and Middle-Sized Advertisers

The latest developments in the advertising market, especially the telecommunications market, the financial and banking system, the strengthening of the retail sector, and certainly, the recently awakened automotive, make the adoption of a ratings system a necessity by the wider advertising market. Additionally, apart from the considerable increase of the advertising budgets, now, there is a major need for maximizing the media performance of ad investments, by facing sophisticated marketing methodologies and tools from the competition.

Are Albanian media ready yet about the need of adopting such a measurement system?

The need for credible, easily accessible television audience data for use in program planning, advertising planning and airtime sales has never been greater in today's Albanian advertising market. The ever-increasing number of TV stations and broadcasting platforms available in the market requires sophisticated schedule planning, and the increasing complexities and cost of television airtime demand greater accountability.

The advertising media expenditure, which amounts to tens of millions of Euros, changes hands on the basis of viewership information. It is exactly for this reason, that a high quality services of measurement and evaluation of the audience is needed. The audience estimations drive this kind of business. In other words, the broadcasters need reliable information on their audience in order to make decisions related to their programming content and structure, and simultaneously, the advertisers spending on commercial air time, the broadcasters and the advertising agencies negotiating between the above to players, need a "*common currency*" to trade the broadcasting air time, in order to efficiently and accountably achieving their business goals.

The media companies themselves, as well as other advertising industry players in the Albanian advertising market, have not yet adopted any of the audience measurement techniques offered so far in a sporadic manner and based on data-collection methodologies such as the week-long diary, coincidental telephone or face-to-face interviewing, mostly because of arguments deriving from the out-dated methodology and the instruments used by

these system, as well as due to the lack of collective will, sufficient human and financial resources to establish and support a commonly-accepted and operated measurement system.

It is about time for the Albanian media market to adopt a continuous automatic and electronic audience measurement system as the only possible instrument to assist in establishing a "common currency" to trade advertising space and air time as well as to make informed decisions about their respective television programming structures.

D. THE ERA OF "CROSS-PLATFORM" MEDIA AND ITS AUDIENCE

In view of the absence of readily-available research findings, monitoring studies, reliable surveys and other means to collect continuous audience measurement data that will help in carrying out a solid analysis of the Albanian media market, the efforts in trying to identify the real viewership, readership or listenership - and, in real time - through various media platforms, or endeavors to understand and assess the so-called "cross-platform" media audience, by utilizing the opportunities and capabilities offered by the new technology and online media, can provide a relatively inexpensive and efficient alternative in the case of Albanian media market.

It appears that in this process, the massive usage of social networks such as Facebook, will help to discover new media audience behaviors and attitudes, though many experts would argue that the media industry would still need more longitudinal and comprehensive studying process in order to further analyze the way viewers spend their time with media and social networks while performing other activities at the same time (or, multitasking, as it is now widely referred to by the industry experts).

Recent developments in this regard in the media market in Albania?

Though the Internet penetration rate in Albania is still low compared to other developed markets, and the adoption of new technology devices (PC, laptop, tablets, smartphones, etc.) is yet in its first steps, the penetration level of social networks, mainly Facebook, independent research findings suggest that there are around 1 million Albanians users of this particular network (*Source: socialbakers.com*). In this view, the data collected by this social network can be analyzed, in terms of the interaction of the respective audience with the accounts (or profiles) of any media title.

The following is a case study is outlined as a measuring instrument for analyzing the accounts (profiles) of Albanian daily newspapers in the Facebook social network, which can also be applied to any media category, and can provide interesting data on the behavior, usage, attitude and preferences of their respective audiences.

E. CASE STUDY: ANALYSIS OF DAILY NEWSPAPER PROFILES IN THE FACEBOOK SOCIAL NETWORK

Methodology

This study analyzes the estimated activity of all Albanian daily newspapers with a presence in the social network, Facebook. The measurement instrument used in this study, analyzes all

the activity of the respective profiles (accounts) of these daily titles in the social network, Facebook, according to the following measured indicators:

- **presence**, or not (**lack**), in the social network Facebook, in one of the following forms (a) Fan Page - account for commercial use offered by this social network for its users, or (b) Profile Account – non-commercial profile, or account for personal use offered by this social network for its users;
- **number** of followers ("Fans" for Fan Page, and "Friends" for User Account);
- **comments** ("Comments");
- **preferences** ("Likes");
- **distributions** ("Share").

The data cover the time period of 1-30 September, 2012.

Presence in Facebook Social Network

Out of all the daily newspapers currently printed in the Albanian market, only 85% of them are present with a specific profile (account) in the social network Facebook. Of those present, 59% have a commercial profile, or '*Fan Page*,' while the remaining 41% have a simple profile ('*User Account*') for non-commercial personal use.

Corresponding number of newspaper profiles followers

Regarding the number of followers ('*Fans*' or '*Likes*') of the respective daily newspapers with a *Fan Page* on Facebook, by the end of September 2012, it appears that "*Shekulli*" tops the list with 19.420 followers ('*Fans*' or '*Likes*'), followed by "*Tema*," with 11.987, and then, "*Mapo*" with 5.646, while "*Sot*" sits at the bottom with 378 followers.

While, regarding the simple (non-commercial) *Profile Accounts* on Facebook, by the end of September 2012, "*Koha Jonë*" leads with 5.519 followers ('*Friends*'), followed by "*Metropol*" 5.393, and "*The Albanian Times*" with 2.100 closing down the list.

Activity of newspaper profile's followers

In addition to assessing the total number of followers (or the respective social network audience) for each of the daily newspapers, it is also important to evaluate the level of involvement and activity of these followers on Facebook. Such an evaluation can be calculated by analyzing the number of functions that this social network provides for interaction with its users, such as:

- Likes,
- Comments, and
- Shares,

for the periodic *status* updates and different *posts* during the time period of the study.

The instrument used for the purpose of this analysis indicates that "*Tema*" (see Table 4) has the most active followers as compared to the rest of the newspapers, taking into account the number of likes, comments, and shares of its statuses and posts in September 2012. Therefore, during September, "*Tema*" gained 4.131 likes and 1,759 comments by its followers its posts, who appear to be about 50% more active than the followers of "*Shekulli*," which comes a distant second after "*Tema*" regarding the level of involvement of its followers. "*Shekulli*" has managed to gain 2,352 likes and 437 comments from its followers for all its posts during September. Meanwhile, unlike "*Tema*" which reports no shares of its

posts or status updates, "Shekulli" comes up first among the rest of the daily newspapers with 591 shares. One of the dailies with a significant number of followers, 5.296, but with minimal level of involvement of its followers (*only 96 comments*) appears to be "Shqip," while "Sot," reports the lowest number of followers, with only 378 in total.

Table 2. – Albanian Daily Title Commercial Profiles (Fan Pages) in Facebook

| Nr. Newspapers | Fans / Likes | Reach | Like | Comment | Share |
|------------------|--------------|-------|-------|---------|-------|
| 1 Shekulli | 19,420 | 776 | 2,352 | 437 | 591 |
| 2 Tema | 11,978 | 540 | 4,131 | 1,759 | 0 |
| 3 Mapo | 5,646 | 297 | 716 | 163 | 37 |
| 4 Panorama | 5,381 | 376 | 630 | 106 | 12 |
| 5 Shqip | 5,296 | 96 | 0 | 0 | 0 |
| 6 Shqiptarja.com | 2,806 | 340 | 731 | 175 | 104 |
| 7 Intervista | 4,947 | 198 | 453 | 119 | 60 |
| 8 Respublica.al | 1,410 | 7 | 360 | 95 | 0 |
| 9 Gazeta 55 | 542 | 6 | 2 | 0 | 0 |
| 10 Sot | 378 | 1 | 2 | 0 | 1 |

Source: Abacus Research, November 2012. Data were collected from 1-30 September 2012.

Table 3. – Albanian Daily Titles with Private Accounts (Profiles) in Facebook

| Nr. Newspapers | Friends |
|------------------------|---------|
| 1 Koha Jonë | 5,519 |
| 2 Metropol | 5,393 |
| 3 Zëri i Popullit | 5,000 |
| 4 Rilindja Demokratike | 4,760 |
| 5 Telegraf | 3,104 |
| 6 Gazeta Shqiptare | 2,735 |
| 7 The Albania Times | 2,100 |

Source: Abacus Research, November 2012. Data were collected from 1-30 September 2012.

Typologies of Albanian Daily Titles in the Social Network of Facebook

The statistical quadrant analysis of the daily newspapers' presence, activity and involvement of their respective followers in the social network of Facebook, collected through the above-

mentioned measurement instrument, indicates the following four major typologies for the daily newspapers reported in this study:

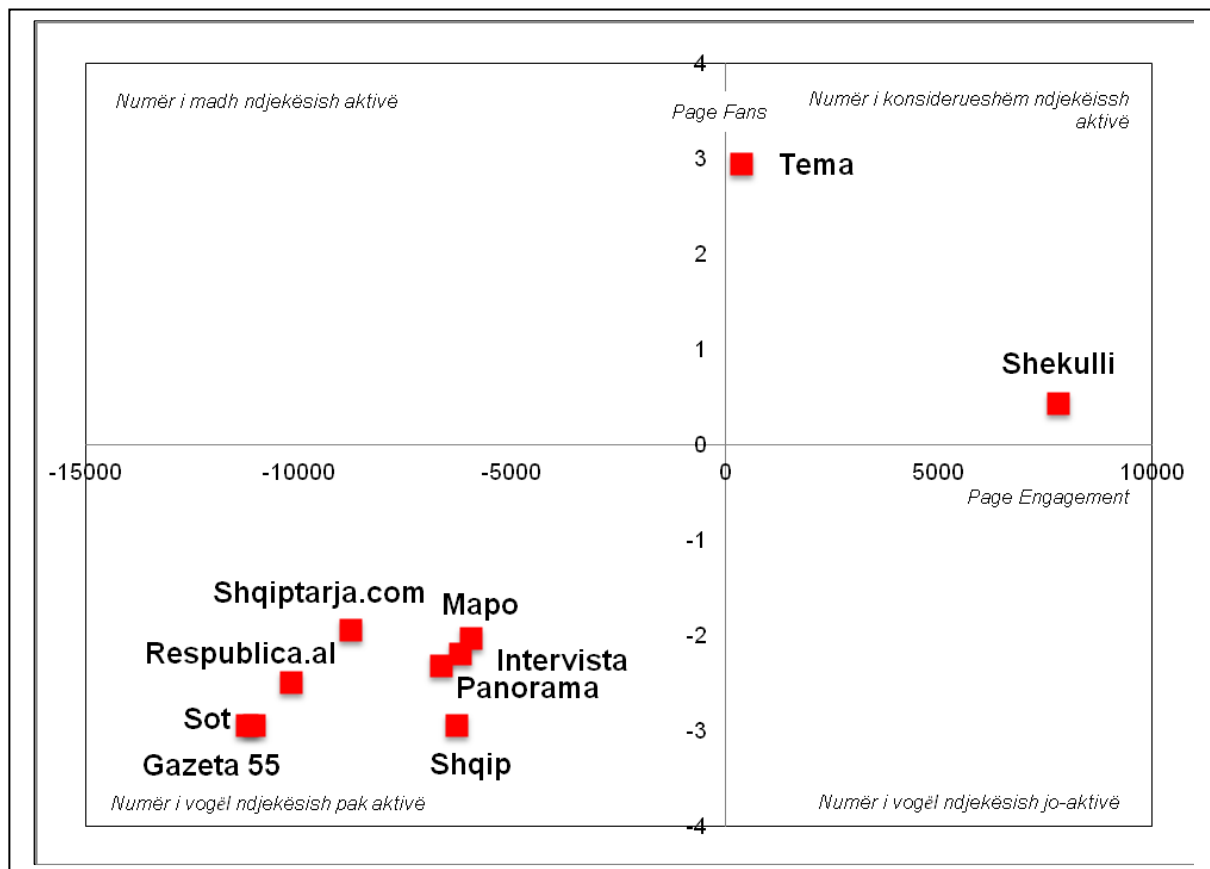
"Leader" - Profile with a significant and active base of followers - newspaper profiles having not only the largest number of followers, but also the most active ones, in terms of the number of likes, the frequency of comments for their posts and status updates on this social network site.

"Followers collectors" - Profile with small numbers but active base of followers - these types of profiles consist of handful followers, but with a considerable level of involvement with the posts and status updates of the respective profiles. Followers of these types of profiles follow steadily the updates of their preferred profile and they are ready to respond to a greater number of issues discussed in these posts and status updates.

"Lazy" - Profile with a considerable number of followers, but inactive ones - this category comprises profiles with a relatively large number of followers, but with a low level of involvement. As with their respective newspaper profiles, which post infrequent updates and are not generally very active, their followers are also relatively inactive in terms of the number of likes, or frequency of comments and/or shares.

"Foot-dragger" - Profile with small and inactive base of followers - this is the most underdeveloped typology in terms of the amount of activity in the social network, Facebook. This typology of profiles does not even have a *Fan Page*, but just a simple user account, which does not provide for a high degree of exposure to the social network's potential audience, with a limited number (maximum 5,000) of friends per account.

Table 4. - Typologies of Albanian Newspaper with Facebook Social Network Profile



Source: Abacus Research, November 2012. Data were collected from 1-30 September 2012.

F. DISCUSSION OF THE IMPACT OF SUCH ANALYTICAL MODELS MAY HAVE ON THE MEDIA, AS WELL AS ON THE ADVERTISING MARKET IN ALBANIA

A relatively small market and at the same time unfavorable to the development of sustainable (both electronic and print) media business models, its difficulties are clearly reflected in (a) the very low circulation figures of a unusual large number of daily newspaper for such a small-sized market; and (b) the comparatively low cost of advertising space sales for the electronic media. Despite the continuous professional development efforts, the Albanian media market has still not been able to adopt an effective system of self-regulation and the lack of research findings, monitoring studies, reliable surveys or other means to collect data on electronic media audience, continues to be an obstacle to a solid analysis of the Albanian electronic media market.

Because of the complexity of establishing such a measurement system, as well as the brief history of the Albanian television market development, one plausible approach would have been the establishment of a permanent media market sitting committee – by ensuring representation by the media companies themselves, advertising and media agencies, as well as research experts, - which would design and approve preliminary the methodology and procedures in establishing an audience measurement system in Albania. Therefore, the priority for establishing such a measurement system shall lie with the definition of a commonly-agreed measurement methodology and procedure, rather than the arguments on how it should be organized.

In lack of commonly-agreed audience estimation services, the analytical models of interaction provided by social networks, such as the one proposed in this case study, would be a step in the right direction, in order to provide these stakeholders with a tool to improve their marketing performance of their business model, and therefore garner higher profits as a result of the increased level of sales or brand recognition by the consumer resulting from the relevant marketing investments. Additionally, similar services may be useful to other state institutions, or independent and academic researches organizations with a special interest in understanding and studying the media market. In lack of such independent third-party estimation systems that would adopt the highest standards of scientific accuracy and integrity, the media market shall not operate effectively.

What most of the industry experts agree on, is that the interaction of the audience provided by the presence in social network accounts of traditional media organizations, provides the opportunity for:

Deeper understanding of the relevant audience and their preferences - Usually, the information for understanding the demographic and other relevant audience data for a certain television program, or the content of a specific edition of a print title, is collected through surveys, focus groups and other traditional research methods. But, by analyzing social media data, media and advertisers are beginning to understand better the so far invisible threads connecting the viewers with a specific editorial content, but also the products or services promoted on the advertising blocks of these media outlets.

Real-time knowledge of success or failure - With traditional analytic media audience data, the managers of these companies or advertisers are forced to wait for several weeks, or even longer, until a show (or advertising campaign) in order to understand exactly how the program (or the campaign) is perceived by the audience. With online social networks

audience data, they can know almost immediately if a program (or an ad) had a good or bad performance.

Immediate unit measuring the level of audience involvement with the media - The audience data obtained from social networks can serve as an immediate measuring unit of the level of audience involvement with the media, where the audience members interact to express their own degree of consent, or not, against the editorial content and/or shows, as well as emotions, attitudes or preferences, which would otherwise have been rather expensive and time-consuming to measure.

Exploratory studying of editorial strategies that meet the requests and preferences of the audience – It appears that the daily titles researched in this case study, are trying to use the social network of Facebook as a media environment in order to attract the readers to their official homepages. In this view, the news directors and staff of these dailies, can design and develop strategies for establishing and further fostering the dialogue with their readers, and not rely just on preserving their readers' preferences for sharing the links of the reports published in their official webpages.