

MEASURING THE DIGITAL VERSIONS AND THE WEBSITE OF PRESS TITLES: THE BELGIAN EXPERIENCE

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Introduction

For over 40 years, the CIM (Center for Information about Media, the Belgian JIC) measured the reading of press titles for the purpose of media planning for the advertising market. During all these years, the CIM has consistently questioned individuals about their reading habits of the paper versions of press titles. The technological evolution however considerably changed the way content is distributed and consumed. The need to have a study that can measure and value every moment of reading, whatever the platform or format, print or electronic, has become a major priority.

The 'CIM Press 2012-2013' study marks an important milestone in the measurement of the press audience in Belgium. If the foundations of the study (universe and sampling, recruitment, mode of administration) remain unchanged, the questionnaire was fundamentally redesigned to incorporate the measurement of the reading of the digital versions of print titles (PDF and Apps) and their website and this, whatever the reading platform: computer, tablet or smartphone. Aside this methodological change, the implications for the exploitation are very important since the measurement of digital versions gave birth to new indicators. First of all, note that the current currency, the Reading Last Period (Average Issue Readership) of the "paper version" is maintained. But this currency will probably no longer be the only currency in the market. The measurement of the digital versions (PDF, Applications) has indeed given rise to a new audience indicator: the "Paper + Digital Versions". This indicator includes the combined audience of the paper version of the title as well as the PDF versions and available applications on tablets and smartphones.

Finally, the Technical Committee also allowed a third indicator that is designed to reflect the audience of the media brand. The "Total Brand" indicator therefore includes the audience of the paper version, the digital versions (PDF + App) and the website of the concerned title. However, this indicator is not considered as a currency and therefore not available for media-planning purposes.

In this paper, we will detail the way how the question on the reading of electronic versions of press titles has been introduced. Then we will see how the CIM has defined the new indicators and have a first look at some results of this work.

1. The new "Print and Digital" survey in Belgium

1.1. Terminology

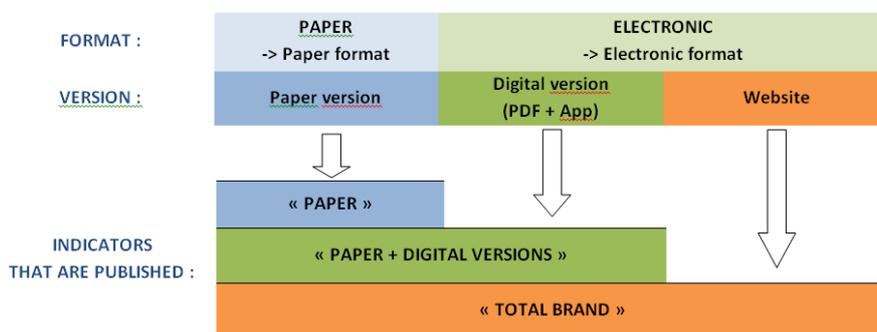
Integrating the measurement of the electronic formats of print titles has resulted in fundamental changes to the questionnaire of the study. Its overall structure has been completely redesigned. The wording of the question on reading has also been modified for this purpose. Finally, additional questions have been added in order to measure the consultation of the different versions available and the used digital devices.

This chapter discusses the changes made to the questionnaire and the integration of the measurement of the electronic editions of press titles. But first, here are some details about the terminology used.

We talk about the *Media Brand* to define the audience for a press title regardless of the *format* or *version*.

- there are two types of *formats*: the editions published in hard copy (paper) and those published in an electronic format, whatever the device.
- there are three types of *versions*, which will be used as basis to define the indicators:
 - The *paper version*: it reflects the printed publication;
 - The *digital versions*: here we refer to the PDF's and Applications. These are versions that are, in terms of content and frequency, the closest to the paper version;
 - The *website*: this will be used to define the media brand.

The terminology that is used in the definition of the indicators can schematically be summarized as follow:



1.2. Media Brand: paper format and electronic format

The concept of electronic format of a press title is very broad and open to interpretation. It was therefore essential for the CIM Technical Committee to adopt a definition that meets two needs: to have a reach indicator that meets the new reality of the reading habits of the consumer and to have a questionnaire that is understandable to the "lambda" respondent who is not supposed to be aware of all developments in this area.

The "One" survey conducted by Audipresse in 2011 (France) has been a major inspiration to the CIM Technical Committee to define the measure of the reading in electronic format. The main contribution of this approach being the segmentation into "versions" vs "devices":

- "Version" means the electronic format used to distribute content. There are three types of versions:
 - the PDF version or the downloadable version;
 - the application;
 - the website.
- "Device" means the medium or material used to view content in electronic format. There are three types of devices:
 - a computer (desktop or laptop);
 - a tablet computer;
 - a smartphone.

Theoretically, crossing versions and devices leads to 8 usable combinations, of which only 6 were selected by the CIM Technical Committee to work with. It comes to:

- the downloadable edition (PDF, digital version), which is available on PC, tablet or smartphone
- the application on a mobile phone
- the application on a tablet
- the website via a mobile phone
- the website via a tablet
- the website via a computer

These combinations are illustrated below:

	Smartphone	Tablet	PC
PDF			
Application			
Website			

1.3. The questionnaire

The measurement of the reading in electronic format is a topic that is widely discussed on international level and well documented. The main issue was therefore the integration of the questions about digital reading in the questionnaire.

The literature tells us that, in general, two different procedures may be applied:

- the first one, which might be described as "multiplatform" favors a measurement in which the question of the reading in the past months ("Ever read claim") immediately integrates all ways of consuming the press titles: in print, on the internet, via an e-reader, or via any other electronic medium. There is an interest only later to ask the respondent whether it was the paper and / or digital version or the website version of the press title. This approach was tested in particular by GFK / MRI in the United States.
- the other method gives priority to the reading of the paper format and to address the questions on the reading in electronic formats after them. This process was favored by Audipresse (France).

The CIM Technical Committee considered the approach of the US too innovative, and too risky in terms of potential confusion on the part of the respondent. The French approach was in turn perceived as too conservative and carrying a risk of underestimation of the reading of the digital versions and of the websites (over-estimation of the reading of the paper versions) that are systematically presented at the end of the questionnaire.

The model for which the CIM Technical Committee finally decided is the result of a subtle blend of these two approaches.

This model consists of:

- a) first measuring the total reading of the press titles in paper format on the one hand and in electronic format (presented under the heading "Digital version or the Website") on the other hand, within a single same question on the reading in the last months (question on the total readership), as shown in the example below;

Presentation of a question on the reading in the last months (total readership):

The screenshot shows a questionnaire question from TNS. The question asks: "Au cours des derniers mois, avez-vous lu, feuilleté ou consulté, la version papier ou une version numérique ou le site internet du titre La Libre Belgique - Gazette de Liège (Francophone), chez vous ou ailleurs, même s'il s'agit d'un numéro ancien ?". Below the question, there are two sections for selecting a response for each version. The first section is for the paper version, with the title "La Libre Belgique - Gazette de Liège (Francophone)" and the question "Version papier :". It has two radio button options: "oui" and "non". The second section is for the digital version or website, with the title "La Libre Belgique - Gazette de Liège (Francophone)" and the question "Version numérique ou le site internet :". It also has two radio button options: "oui" and "non". Red arrows point from the text "answer for the paper version" to the first section and "answer for the electronic version (Digital version or the Website)" to the second section.

- b) then, switch to questions about the reading in the last period and the qualitative questions (frequency, proportion read and acquisition mode) for paper versions only and this, according to the classical scheme. Note that questions on the reading of digital versions and/or websites only come after all questions on the reading of the paper version have been addressed;
- c) finally, for each title for which the respondent claims having read a digital version or the website during the last month, as specified in a):
 - ask the question on reading in the last month (total reading) for each "version x device";
 - for each "version x device", ask the question on the reading in the reference period (read last period);
 - for each "version x device", ask the question on the frequency of reading;

Example of a question on the reading in the past months (total readership) for each "version x device":

TNS

Au cours des derniers mois, quelles versions numériques du titre Femmes d'aujourd'hui (Francophone) avez-vous consultées, que ce soit chez vous ou ailleurs ?

Plusieurs réponses possibles.

Femmes d'aujourd'hui (Francophone)

Version numérique ou le site internet :

- l'édition téléchargeable (PDF, version numérique) que ce soit sur un ordinateur, une tablette tactile ou un téléphone mobile
- l'application sur un téléphone mobile
- l'application sur une tablette tactile
- le site internet via un téléphone mobile
- le site internet via une tablette tactile
- le site internet via un ordinateur

The respondent must declare in which electronic format(s) (combination of "version x devices") he has read the magazine "Femmes d'aujourd'hui" in the past months. This gives the Total Readership for each version for this title

Example of a question on the reading in the reference period (read the last period) for each "version x device" cited in total reading:

TNS

Quand avez-vous consulté pour la dernière fois le site internet via une tablette tactile du titre Elle Belgique (Francophone), chez vous ou ailleurs ?

Une seule réponse possible.

ELLE.be
ELLE
BELGIQUE

ELLE Belgique (Francophone)

le site internet via une tablette tactile :

- hier
- au cours des 7 derniers jours
- au cours des 14 derniers jours
- au cours des 30 derniers jours
- au cours des 2 derniers mois
- il y a plus longtemps

An open recency question is used for the question on the reading in the last period for the digital versions and for the website. This does not apply to the PDF versions which has the same reference period as the one of the paper version (same content, same frequency)

Example of a question on the frequency of reading for each "version x device":

TNS

En général, consultez-vous le site internet via une tablette tactile du titre L'Echo (Francophone) :

Une seule réponse possible.

L'ECHO (Francophone)

le site internet via une tablette tactile :

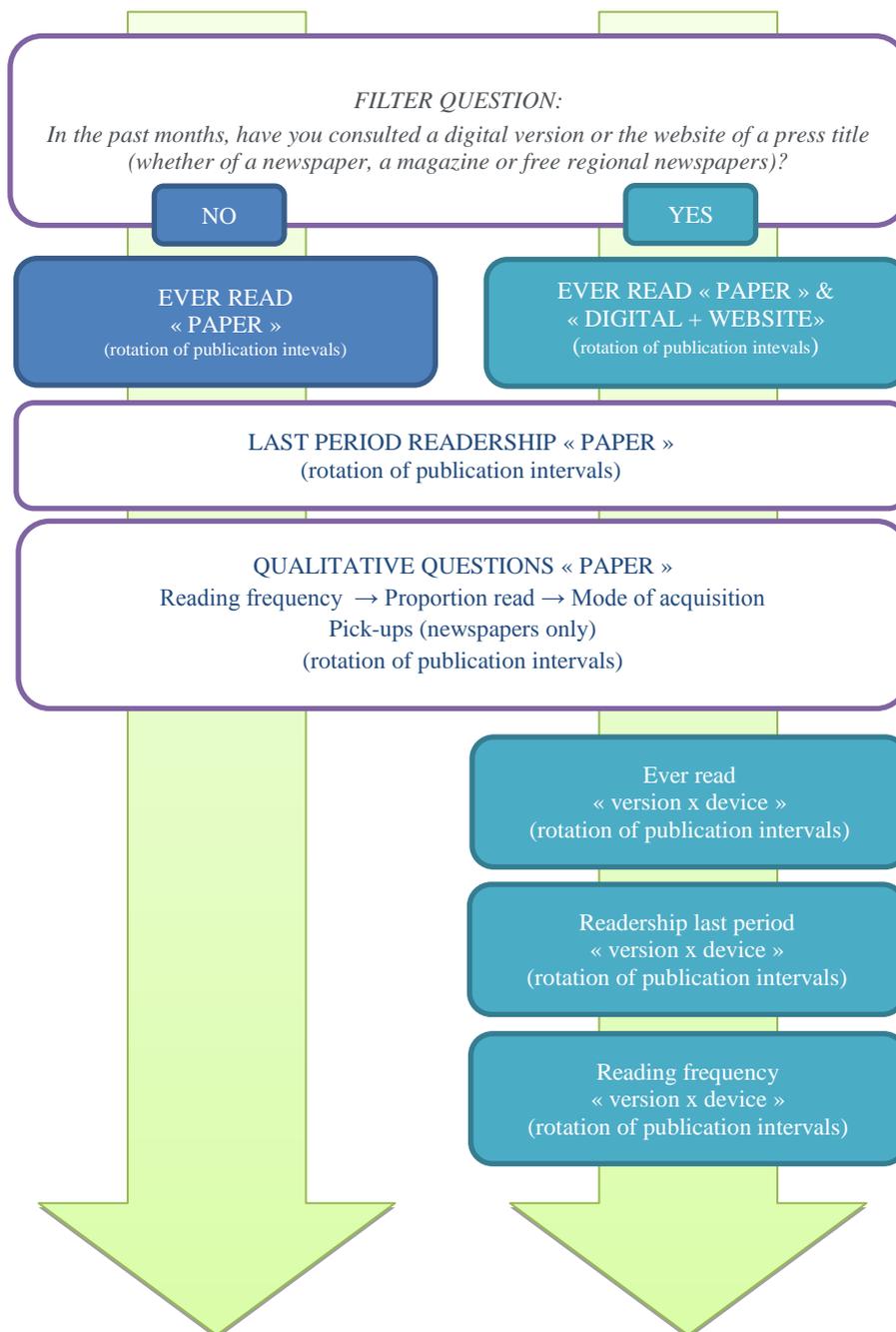
- systématiquement (une ou plusieurs fois par jour)
- presque tous les jours (4 à 6 jours par semaine)
- souvent (1 à 3 jours par semaine)
- de temps en temps (1 à 3 jours par mois)
- rarement (1 à 3 jours par trimestre)
- moins souvent (moins d'un jour par trimestre)

In order to be able to calculate a probability of reading for each respondent amongst the Total Readership, a question on the frequency of reading has been added.

The qualitative tests that were conducted by the TNS Media (the research institute in charge of the fieldwork) before the launch of the questionnaire in the field have been rich in learning. Respondents who participated to the test were complaining about having to undergo questions about the reading of digital versions and websites while they were not part of their reading habits. Besides, the average length of the questionnaire was far too long.

In order to address this problem, and to increase the relevance of the questionnaire to the respondent, the CIM Technical Committee decided to introduce a filter question on the reading, in general, of electronic editions of press titles. Only the people who responded positively to this question received the questions related to the reading of digital versions and website. Others fell into a classic questionnaire focused exclusively on paper versions of the measured press titles.

The sequence of the questionnaire may be summarized as follow:



1.4. Reading of the press titles in electronic format

As explained above, the question on the total reading of the various electronic versions is asked at the beginning of the questionnaire. The total reading question for each “version x devices” combination is asked after the questions on the reading of the paper versions. The interviewed person is asked about the way he used each title in electronic format. There are 6 possible answers (ways to read in electronic versions):

- the downloadable edition (PDF, digital version), which is available on a PC, a tablet or a mobile phone
- the application on a mobile phone
- the application on a tablet
- the website via a mobile phone
- the website via a tablet
- the website via a computer

Then comes the question on reading during the reference period (“Average Issue Readership”). This question is asked for all titles used and for all "versions x devices" combinations the respondent had validated. However, the wording of this question depends on the electronic version: for the PDF version, we use the reference period of the paper version; for the application and the website, the respondent gets an open recency question.

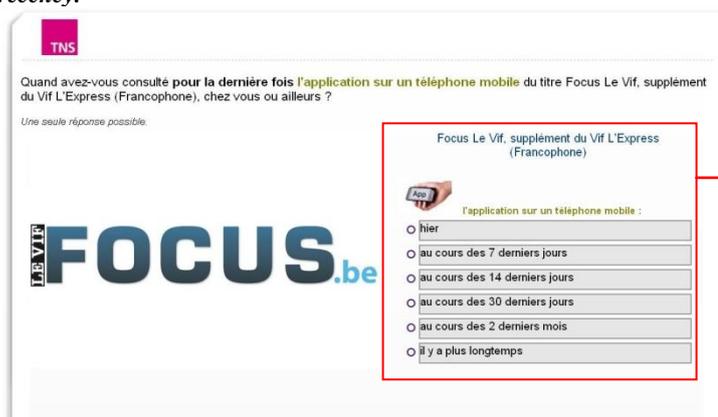
Example of the question on reading during the reference period (read the last period) for the downloadable version (PDF):



For the downloadable edition (PDF), the reference period of the paper version is used:

- the day before for a daily,
- the last 7 days for a weekly
- the last 14 days for a bi-weekly
- the last 30 days for a monthly

Example of the question on reading during the reference period (read the last period) for the application and for the web site, using an open recency:



For the other electronic versions, an open recency is used:

- yesterday
- during the last 7 days
- during the last 14 days
- during the last 30 days
- during the last 2 months
- a longer time ago

Then, for each “version x device”, the question of frequency of reading is asked as well.

1.5. Illustration of the question on the reading of digital versions and websites

To illustrate the issues on web sites and digital versions, the Technical Committee decided to use one or maximum two specific logos (logo of the App, of the website, ...). If the publisher could not have a specific logo, the one of the paper version was shown.

The risk of this approach was to get answers for non-existent digital versions, which has also been observed in the gross results. However, these 'false positives' were simply cleaned up while processing the first results.

2. Small numbers are beautiful: new reach indicators

The range of potential reach KPIs was wide. As illustrated below, not less than 7 different indicators (1 paper, 3 combined paper + digital and 3 digital only – see also 1.2.) were listed as candidates: since the questionnaire was detailed, there was theoretically room for details in the results as well.

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In spite of this potentially wide choice, the final selection of available reach definitions has been restricted to three indicators (Paper, Paper+PDF+App and Total Brand) for various reasons:

- The limited sample size, first. The Belgian JIC audience research is based on not more than 10.000 respondents (sample size of 10.065 in the release CIM Press 2012-2013). Knowing that Belgium consists of two main languages communities, and that hardly a few people read publications in the other language the actual universe is generally smaller than the national sample size. Furthermore we learn from the circulation figures that for newspapers digital sales only represent 3.2% of total sales (and less for magazines). Hence, we could only reasonably expect small values for reading digital versions and wide error margins in the audience estimates. So we would better aggregate as much as possible.
- We could expect higher reach figures for the websites run by the different media owners. Newsbrands URLs generally gather large online audiences, but in this matter we had to avoid any conflicting audience reporting. CIM Internet is meant to provide the market with a digital currency. In case competitive values would come from the

CIM Internet audience panel and from the CIM readership survey, disputes would likely occur on which is the “best one”. Decision has been made not to disclose the websites audience values, but only to publish audience data that consolidate all instances of the different mediabrands (see further). In the future, fusion techniques like the ones used by Audipresse in France might solve the problem: online audience currencies from the Internet survey could replace website reading claims.

- Third consideration: the actors involved had different expectations. Media agencies –present in the JIC- wished to be provided with reach indicators that maintain consistency with the past: reach of paper was for them mandatory. Magazines publishers somewhat followed, since their digital deployment is generally speaking more limited. With their various online versions present on virtually every possible device, newspapers wanted consolidated figures across paper and digital: they argue their audiences are cross media and their advertising sales now combine print and digital ads.
- Finally, it also appeared in the analysis of the results that the interviewed persons tended to confuse the notions of ‘format’ and ‘device’. Or better, not being able to remember with precision on which device they consulted the website of a press title, or if they visited the website or the application to read the news. So the CIM Technical Committee decided to aggregate the data on format level and to limit it to 2 digital formats: the ‘PDF + App’ and the ‘website’.

The CIM Technical Committee finally agreed on publication of three types of reach figures, with different usage purposes:

- The “Total Brand” indicator that includes the net reach of the paper and the electronic formats, irrespective of their platform or version. The market has been asked to use it as an analysis – not for media-planning! – KPI. This means users of the CIM data are allowed to perform any profiling, crosstab or duplication analysis they want, but NO SCHEDULE construction, evaluation or optimization. This aimed to avoid any collision between the CIM Internet and the CIM Press currencies.
- Next to the “Total Brand”, two media-planning variables have been defined:
 - o Reach “Paper + Digital Versions”: (see 1.1) publishers (at least newspapers) see it as the “next currency”. Agencies would accept it as soon as it is demonstrated that all ads are actually present on both paper and applications/PDF;
 - o Reach “Paper”: the most conservative KPI available. Although it seems perfectly aligned with the past, the differences in questionnaires let CIM advise users not to compare to previous values. This “paper only” indicator might be privileged by most of the magazine owners and by media agencies, and will remain the reference currency in many cases.

3. Main results

One of the major concerns when it comes to analyze the results of a new study, with a methodology that has profoundly been modified, is to know to what extent the comparisons with the past are relevant... or not. The message of the CIM to the industry is clear and simple: any comparison with the past is strictly forbidden! Even if the “Paper” indicator could be, a priori, the one that maintains the best continuity with the past.

Any comparison is therefore excluded. Even for the indicator paper.

This being said... let’s compare!

3.1. Paper vs Paper

The principal richness of this new study lies without doubt in the measurement of electronic versions of press titles. However, it is obvious that this new approach has implications on the evolution of the audiences that were measured in the past.

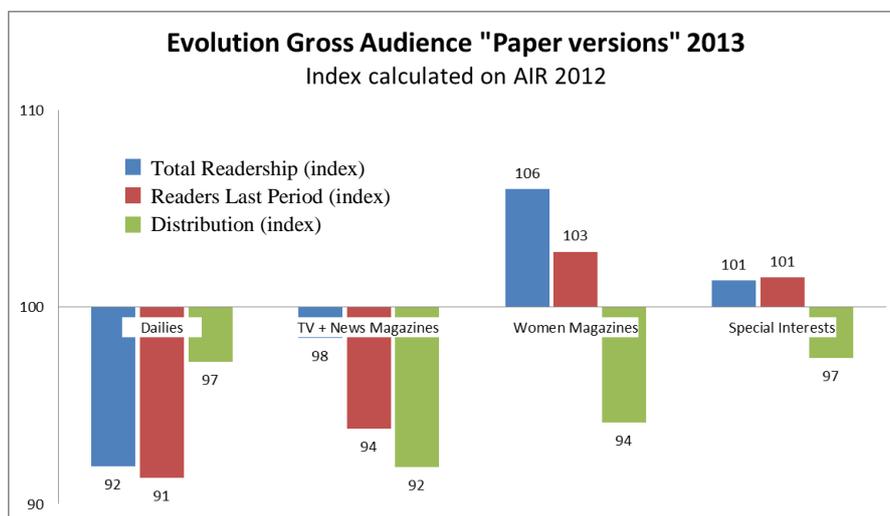
In the graph hereunder, we detail the evolution of the (gross) audience of the main press titles according to different categories: dailies, news and TV magazines, women magazine and special interest magazines. Attention: this comparison is only worthwhile for research purposes and more specifically for the analysis and the comprehension of the impact of the new study on the audiences. These evolutions have no value for the media industry.

Overall, we can observe that measuring the electronic versions of press titles within a press survey has, in general, a negative effect on the “old” audiences. These effects also appear to be different for the different types of press titles: we can see that

the press-titles that have a content that is more news related are far more subject to a decrease. We could argue that the news brands have also a more important presence on the digital scene due to the instant character of information.

The decrease of the audience of the paper version is also more pronounced in terms of reading last period, reflecting a lower proportion of loyal readers:

Evolution (index) of the audience of the paper version, Total Readership and Reading Last Period:



When we look at the results of the 'Paper' indicator in the new survey, we observe a decreased 9% (Reader Last Period, Gross Reach) on the side of the daily press. The decrease in circulation is in all likelihood at the origin of these changes (-3% nationally), but is certainly not solely responsible for the erosion of readership "Paper" measured in the study. The fact that the questionnaire now makes a clear distinction between the reading on paper and the reading on electronic devices, should avoid that the respondent makes the confusion between different moments of reading, for example, a recent reading of a media brand on a tablet or on a smartphone with the reading of a paper version a couple of days ago.

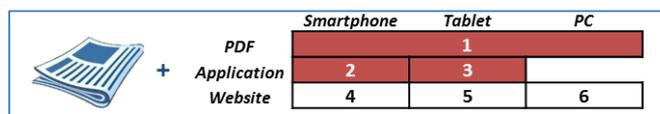
Even if it is sometimes hazardous to make a strict comparison between audience figures and circulation data, we can see that the decline of the number of copies sold is also an important factor that explains the evolution of the TV and News Magazines. This effect is different when we look at Women and Special Interests Magazines, which benefit of a longer life cycle due to the monthly frequency of some titles.

3.2. New indicators: 'Paper + Digital Versions' and 'Total Brand'

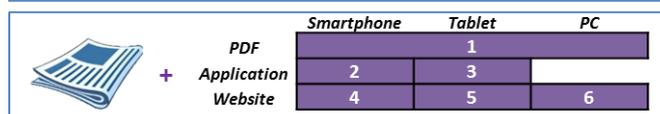
As described earlier in this document, the CIM Technical Committee decided to publish two new indicators next to the classical AIR (Average Issue Readership) of the paper version, which remains in use.

The first new indicator validated by the CIM is the 'Paper + Digital Versions'. This indicator includes the audience of the paper version of the press title as well as the PDF version and/or the available application on tablet and smartphone. The market will decide to what extent this new indicator will be used as currency. The second new indicator is designed to reflect the media (Media Brand) brand regardless of the medium. The Total Brand therefore includes the audience of the paper version, the digital version (PDF + App) and web site of the concerned title.

- Paper + Digital Versions (Paper + PDF + App)



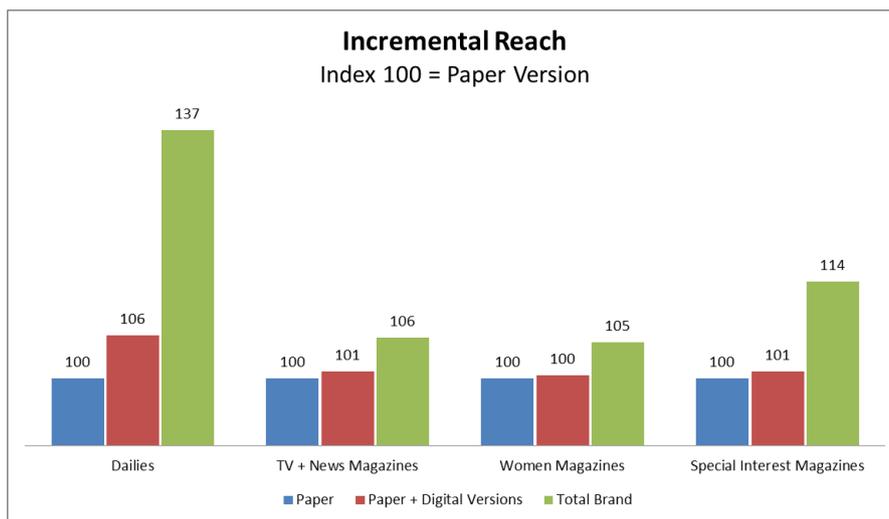
- Total Brand (Paper + PDF + App + Web)



3.3. Incremental reach

Looking at the incremental audience of the two new indicators, we can deduce that the reading of press titles via an application on the smartphone or tablet and the reading of the PDF version is still limited. When the paper version is taken as basis (index = 100) the incremental reach of the «Paper + Digital Versions» indicator for magazines hardly exceeds 1%. The newspapers are showing a higher incremental reach with their digital versions: 6%. This reflects the stronger focus of newspaper publishers on expanding the ways in which their contents are distributed on mobile devices. The newspaper publishers therefore also consider the indicator «paper + digital versions» as the new currency of the study.

Incremental audience of the new indicators in Reading Last Period:



In Belgium, the reading of press titles in electronic format still mainly comes from the consultation of the websites of press titles resulting in a high incremental reach for the indicator “Total Brand”, which also includes the consultation of the website of the measured press title. This is especially true for daily newspapers. The high index for newspapers is the result of their efforts done in digital and also reflects the relevance of digital formats for news content, which is the best response to the readers who want to be continuously kept informed of news facts. For the “news magazines”, which are more focused on deepening important news facts, this argument can be extended. For “woman magazines”, the reading in electronic form is less relevant which results in indexes that are less pronounced than those of newspapers and other magazines.

Finally, when we compare the evolution of the audience of the paper version and the incremental audience through electronic versions, we can see that the daily newspapers and the news magazines, which have the most important drop in their ‘Paper’ audience also have the strongest grow when we look at the ‘Total Brand’ indicator. Though these evolutions make sense for the reasons explained here above, we also could argue that the audiences in the previous release of the survey were over-estimated. These evolutions, even if they look more than coherent, can also result from a “shift” in the answer of the respondent, who can finally declare its reading of press titles in electronic formats.

Evolution Paper (Reading Last Period) vs incremental “Total Brand”:

	Major loss “Paper” (RLP)	Major win “Total Brand”
Dailies	-9%	+37%
TV + News Magazines	-6%	+6%
Women Magazines	+3%	+5%
Special Interest Magazines	+1%	+14%

4. Conclusion

The CIM has introduced for the first time the measurement of electronic versions of press titles in its currency study. If this new approach gives an answer to the demand from the market, it is clear that the implications in methodological terms are important and not without consequences for the continuity of the data.

On the methodological side, the new CIM Press currency survey has been enriched by the addition of questions on the reading of press titles in electronic format. This was a major methodological turn as we touched here the basis of the study: the question on the reading in the last months (question on Total Readership).

For all individuals who reported reading electronic versions of press titles, we now give the opportunity to distinguish paper and electronic versions. This approach helps to clarify the reading habits of the respondent, as we know that in the previous questionnaire there was a risk that respondents wrongly associated their reading of press titles in electronic format with the reading of the paper versions. We probably underestimated this effect for years, particularly for the daily newspapers.

The “interview journey” has become much more complex. This is mainly due to the different combinations of “versions x devices” that have been used to measure the digital reading. As almost 1 respondent out of 2 is confronted with questions on both paper and electronic versions, we decided to simplify this in the new edition of the questionnaire, focusing the question on reading of the versions (PDF, App and website).

In terms of results, the new study offers for the first time single source data that reflect the audience of the Media Brand. While we agree that the ‘Total Brand’ indicator cannot be used as an indicator for the media-planning, it will be available in the software for descriptive analysis. This indicator will contribute to a better understanding of the evolution of the reading habits of the different press titles.

Media planning specialists now have at their disposal a tool that allows them to combine paper and digital (PDF+App) audience data through the indicator “Paper + Digital Versions”. This will help newspapers publishers to position new commercial offers that combine ads in the paper version as well as on their Apps.

Finally, we decided to keep the audience indicator for the paper (only) version. This was a clear requirement from the magazines and also from the media agencies. Considering all methodological changes, the “motto” that says “do not compare with the past” was launched to the market, which will certainly need some time to get to this new reality.

5. References

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