

The New Deal of Brand Readership Measurement

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1 Context

The economic situation of the print medium has changed significantly in recent years. Above all, publishers are having to face a drop in their income from advertising resources as well as distribution. Online media is also going through a transformation linked to growing trends in digital usage. Publishers have to diversify their sources of income successfully against a backdrop of increasingly intense competition. Finally, they need to consider widening their competitive scope, which now includes "pure digital players" as well as other media which are developing their digital portfolio.

These contextual changes also affect readers of the press. We are witnessing the advent of an intense shift in economic models and increasingly universal access to digital devices. More and more, we have to balance the time we have available for information and recreational activities with how much we choose to spend on them. Naturally, print brands are directly affected by these trade-offs. We must also take into account changes in the ways we access print brands content (whether on paper or digital) by bringing into the discussion these methods which can highlight a technological characteristic – either from the editor him/herself (diversification of distribution media sites, apps, social networks, etc.) or offers promoted by third parties (for example, posted on social networks or digital kiosks) – or of a personal nature for the reader – with for examples savings from sharing or access to theoretically payable digital content via roundabout means (free downloads/hacking).

In this context, the French readership measurement JIC (ACPM - Alliance pour les Chiffres de la Presse et des Médias) decided in the summer of 2016 to issue a call for tender to renew its audience research into print brands, to adapt to these new challenges. This tender was awarded in July 2017 to Kantar TNS in technological and scientific partnership with Médiamétrie, which measures reference audiences for television, radio and digital media for the French market.

2 The design of the new audience research study

2.1 Introduction

The proposed scheme promotes the following:

- **Increasing the audience of print brands by merging printed and digital media.** This will involve three major changes compared to the current study:
 - **Adopting the Brand First Approach** in terms of the filtering issue, to adapt to changes in the consumption of print brands. We want change, but the impact of these changes can be extremely strong and therefore require management.
 - **Creating a single source panel that passively incorporates printed and digital media.** This will optimise the merger with the audience for reference digital media produced by Médiamétrie.
 - **Hybridising audiences with circulation data,** to produce more frequent readership and offer the chance to gauge the readership of the most confidential publications, or even allow the regional dailies to access local readership.
- **Setting up media planning for press brands inclusive of all media,** which is fair across both printed and digital media.
 - **Creating a time based panel** to measure contacts growth in terms of time and frequent consultations
 - **Implementing a multichannel media planning system** with complete symmetry with all digital media
- **Developing print brands** both on the quality of the contacts they generate and on their ability to target the Premium worlds (executives/high income targets) or targeting consumer behaviours.

- **Integrating an engagement module** to enhance the relationship between print titles and their readership from the perspective of the reading agreement, to reveal the specifics of print categories and each media.
- **Integrating Premium targets** into the main survey to create a single survey for both worlds (General all adults 15+ & Premium targets) to facilitate use, and take advantage of the same protocol as the main survey for measuring printed and digital media.
- **Enhancing print brands** by incorporating a portion of the TGI data, giving access to a multitude of consumer target groups across a number of products and services categories, recognised and used by all the actors in the advertising market.

2.2 Description of the new NRS design :

The new NRS design revolves around the following major modules:

1. A 'base' survey taking a large annual sample of 28,000 people

- Data collection method:
 - Respondents are recruited by telephone (CATI)
 - The readership questionnaire then takes place 100% online.
- **The questionnaire:**
 - It allows us to measure clearly the audience for print media and collect data on the readers as well as their digital connections. This helps mergers with other modules (TGI, digital readership, media planning, etc.),
 - The print readership will continue to be based on LDP (AIR) and LNM (Weekly Average Issue Readership for dailies) indicators.
 - Two major innovations are migrating to a Brand Centric system, so we can take into account the reality of print brands better (see below) and the willingness to work towards a "device-agnostic" design.
- **The sample**
 - 28,000 representative interviews of individuals aged 15 and older in France
 - Is spread equally over the 12 months, and per named day
 - One innovation: it includes a sub-sample group of 4,000 Top Executives and Affluent People (high earners) making it possible to reach 9,000 senior executives or high earners globally, and include a Premium/Affluent People targets measurement in our general survey.

2. A single source panel, passively measuring digital traffic for print brands across one section of the base survey participants

- A single source panel, passively measuring digital connections for print brands across one section of the base survey respondents.
- The interviewing of 28,000 individuals on print media readership and the declaration of their digital audiences will be completed by the analysis of traffic on print websites and applications, gathered by tagging the digital platforms of publishers.
- This design (described below) will be a true single source measurement. By allowing more in-depth knowledge of the links between print and digital reading, it will reinforce the merger between print and digital readership on the Médiamétrie panel for measuring Global Internet data.

Components 1 & 2 are used to measure print brand readership, on all their devices, print and digital media.

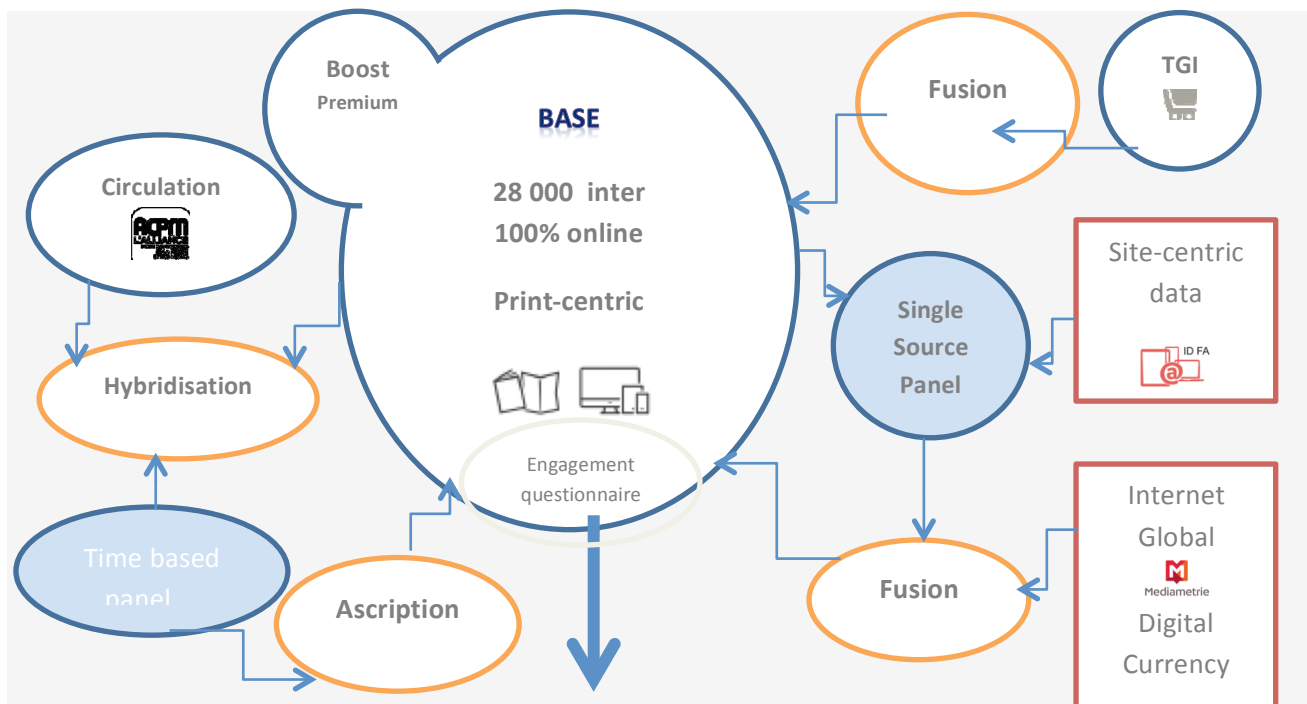
3. A time based panel for global media planning

- This is a major innovation for moving towards a multi-channel media planning for print brands and consideration of a GRP for media as a whole.
- Due to better audience measurement (see below), one of the obvious prerequisites is an improved way of handling any duplications, between devices, media, brands, etc. However, this depends on better qualification and quantification of contacts with print media over time.
- This is the role of the time based panel. It will focus on 4,000 people from Year 1, and over 9 consecutive days will record every instance of something being read and thus reconstitute the frequencies of consultation and the build-up of readership over time for each of the titles (details on this panel below).
- This module will also be used for the hybridisation of readership and circulation data.

4. Add-on modules complete the system:

- A Target Index Group module for better understanding of readers consumption and habits. In order to retain quality data collection focussed on the consumption of print brands, we will reconcile this research with the reference TGI survey in terms of consumer behaviour over a multitude of categories, using a fusion approach. This will also allow inter-media comparisons to be established.
- An engagement module to enhance the quality of media contacts, based on a set of new questions in the readership questionnaire, and details of the circumstances (mood, environment, etc.) of media contacts, observed in real time on the time based panel.
- A Premium module to study the performance of brands on high-end targets: this is the first of its kind in France. The study of Premium, B2B targets (executives, managers, etc.) and B2C (Affluent People with strong purchasing power), will be fully integrated to the One Next project.

System diagram



Valuation Modules

Premium targets

Target Index Groups

Engagement

Strengthened Audience

Print Brand currency

Print Currency

Digital Currency

Media planning Multichannel

Media planning

STRONGER PRINT GRP

2.3 More information about the main innovations

1. The Brand First Approach (Brand-Centric)

Putting the brand at the heart of the system means going beyond the issue of the filter question. Indeed, the Brand First Approach can be approached from two angles:

- **Brand First Reporting:** our clear ambition for the ACPM is to deliver audience results and a print brand media planning system. The architecture of our proposed survey is designed for this purpose.
- **Brand First Data Collection:** this is about rethinking the methodology of the questionnaire, including reading filters and questions on media connections, which are still set separately for print and digital media.

Today, the One survey questionnaire collects data on the print media readership and on digital media connections in a structured way. As such, the print and digital media are treated separately in two different parts of the questionnaire.

The idea in the new system is to improve the fluidity of data procurement and to adapt to the reality of the media by placing the brand at the heart of the action. This should also reduce any confusion between digital and paper reading modes.

On the same subject, our discussions are led by our strong convictions based on our experiences in France and abroad (managing the filter question). Be aware that the impact of these changes can be extreme strong for the readership level. These changes will also have to be managed by qualitative and quantitative testing.

We believe that the unit studied in the filter question must be defined by the print title. Indeed, certain brands have more titles and are more diverse than others and are not necessarily perceived as a seamless whole for readers. When we know the impact of the number of retries on the filter question, we will understand if it's a major risk to let them run rather than handle them simultaneously. This would also prevent these titles from being studied in their own contexts.

At this point, we have the option of two types of presentation:

- **A 1-pass approach:** for each of the titles you are asked to answer questions about the print media and digital media

Grid presentation





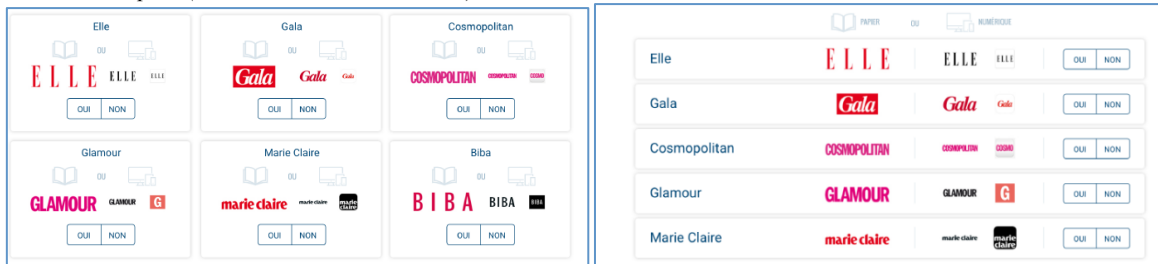
<p>Elle</p> <p> ELLE</p> <p> ELLE ELLE</p> <p>OUI NON OUI NON</p>	<p>Gala</p> <p> Gala</p> <p> Gala Gala</p> <p>OUI NON OUI NON</p>	<p>Cosmopolitan</p> <p> COSMOPOLITAN</p> <p> COSMOPOLITAN COSMO</p> <p>OUI NON OUI NON</p>
<p>Glamour</p> <p> GLAMOUR</p> <p> GLAMOUR G</p> <p>OUI NON OUI NON</p>	<p>Marie Claire</p> <p> marie claire</p> <p> marie claire marie claire</p> <p>OUI NON OUI NON</p>	<p>Biba</p> <p> BIBA</p> <p> BIBA BIBA</p> <p>OUI NON OUI NON</p>

Table presentation

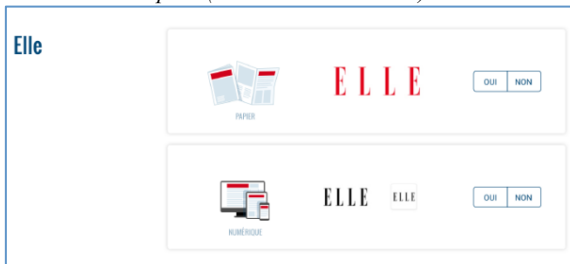
	 PAPIER	 NUMÉRIQUE
Elle	ELLE OUI NON	ELLE ELLE OUI NON
Gala	Gala OUI NON	Gala Gala OUI NON
Cosmopolitan	COSMOPOLITAN OUI NON	COSMOPOLITAN COSMO OUI NON
Glamour	GLAMOUR OUI NON	GLAMOUR G OUI NON
Marie Claire	marie claire OUI NON	marie claire marie claire OUI NON

- **2-pass approach (grid or table layout):** the interviewees first answer for all brands without going into details of the various media, and then on those that have answered positively to the filter question with the details being required.

1st pass (several titles on each screen)



2nd pass (1 title on each screen)



2. The Single Source Panel and the fusion with the digital audience of reference media

The process currently used in One Global (print brands readership) is based on a fusion with 3 separate MMNR (Médiamétrie) panel surveys (desktop or laptop/mobile/tablet). This fusion is based on the date of the last connection (last 30 days/more than 30 days/never). The gateway variables used for the fusion come from the One survey and come in the form of reports.

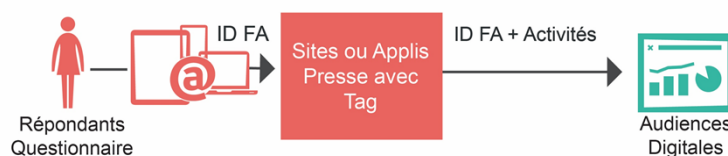
The proposed change for the new NRS is to make up a Single Source Panel so we can see the following for the same individual:

- His declared print and digital readership
- His passive digital readership, by implementing a site-centric measurement.

As such, merging the future survey with the baseline data of Internet print brands may be boosted with this important additional information, particularly details about print and digital duplications.

The principle of the site-centric measurement which will be set up is based on a print website tagging system (or inserting a SDK into applications), combined with cookie deposits log (or a Médiamétrie app) on the device used by the interviewees.

So when a respondent navigates on a print brand website or during use of a tagged print brand application, the tag will automatically recover the ID of the browsing device used with the ID contained in the cookie of a Web browser or IDFA or Android ID for an application. These IDs are sent together with the collected usage data for filtering and processing.



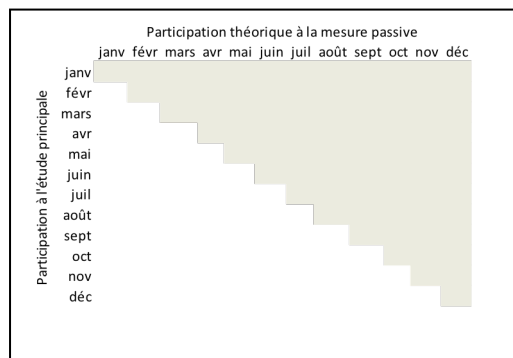
The Single Source Panel will be compiled based on the respondents to the main survey. At the end of the questionnaire on print media reading, the interviewees will be invited to participate in the passive measurement of digital print media, and therefore to activate the devices used to take part in the passive measurement.

Although this method has the distinct advantage in terms of the exhaustiveness of connections or consultations of websites and apps, regardless of the device, compared to the information collected in the report, it has a number of limitations:

- Participation in Single Source Panel is based on the willingness of people to participate in the passive project. In other words, some individuals from the main study will not give any passive data. This participation is also linked to the phenomenon of ad-blockers which will be monitored very carefully in their effects and how to avoid them.
- The activation of all the devices used to connect to the Internet. So, we will have people with all their devices (PC/tablet/laptop) activated according to their uses, and those who will have activated only some of their devices (e.g. only the PC is activated).

A reminder protocol (email, phone, SMS) and incentives will be set up to optimise our rates of participation and device activation. The fact remains, however, that a lot of data will still be missing.

Moreover, the Single Source Panel will be carried out in a staged manner as the main survey field and the activation of their devices progress. The passive data will not be uniform throughout the year.



Discussions are currently underway with ACPM, Kantar, Médiamétrie and CESP (French industry syndicated measurement auditing organisation - MRC) to define the following:

- The use of "over time" passive data: define the passive data used for the fusion for each individual (and device).
- The reconciliation of declarative and passive data.
- The gateway variables for updating the Kantar TNS questionnaire (the declarative data on digital consultations) necessary in the absence of passive data.

Finally, in terms of merging the new survey, we are also discussing how to integrate publishers' content posted on social networks (instant articles, AMP, etc.) in terms of print brands.

The ACPM, Kantar TNS and Mediametrie will define the processes of the project so as to ensure that the personal data protection requirements are in place. They will make every effort to comply with the General Data Protection Regulation and e-privacy regulation requirements with:

- A high level of standard for consent mechanisms (consent must be unambiguous, given with a clear affirmative action, capable of withdrawal at any time). The data subjects will be informed about the specific data being collected and the method(s) used to collect it, whether by an active means such as interviewing or a passive means such as via a mobile app or tracking behaviour via online cookies
- A high level of attention to the security: right of access will be limited, pseudonymisation principles will be applied, personal data will not be hold longer than is necessary, the data flows and storage locations will be documented.

Please consult the ESOMAR Data Protection Checklist for a reference to general guidance on the responsibilities of the researchers as far as personal data protection is concerned.

3. Hybridisation

A hybrid approach to boost more frequent readership data

The principle is to bring the generated readership data together with the circulation data and the data derived from the time based panel (to obtain the time between the title being issued and read), to produce monthly readership figures for print media. We can use this method, together with digital media readership data, to produce monthly readership figures for print brands.

This hybrid measurement will be conducted by the Scientific Department at Médiamétrie in collaboration with Kantar, ACPM and CESP.

A hybrid measurement to give smaller circulation publications access to readership figures

Some titles do not yet have access to audience figures because they do not meet the entry conditions for the reference NRS survey. The main challenge for these titles is to have a level of readership or even a readership profile, without actually having any last-period audience figures (AIR), or integrating media planning tools based on a few indicators (last 12-months readership/and habits) and the circulation data, we can produce their audience ratings by using a hybrid approach.

A hybrid approach for a publication's local readership

With the next NRS, the regional daily press will be able to obtain its readership ratings by title at regional level via a 2-year total. This regional report is still insufficient because, to advertise their media to local advertisers, the titles need to know their readership in specific local areas. Hybridising the different sources available (readership by region, broadcast and socio-demographic characteristics of local areas) will make it possible to model the print brand readership on very specific areas.

4. A global media planning for the press media

- **The time based panel:**

One of the major challenges in the development of the next NRS is to have a multichannel media planning for print brands. The aim is to build a powerful, enhanced media GRP and ultimately bring the print in line with other media.

Although for print brand digital media we have very precise information on their consultation, similar to other media, integrating the concept of accumulation and repetition over time this is not the case for print media. In fact, the current print measurement makes it possible to have the average readership figures, but the concepts of consultations and building up contacts over time have not been taken into account.

This is the reason why we are proposing a time based module making it ultimately possible to converge towards complete symmetry between print and digital media, putting them on the same level so the average reader have a chance to see both.

This is a complex operation that requires an adapted protocol, to understand reading habits better. In fact, this information requires surveying users over a defined period with a dedicated tracker attached to the main device.

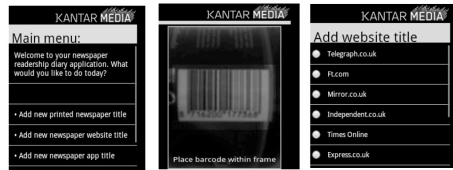
As such, we propose surveying 4,000 people over a period of 9 days. The information gathered on reading behaviour: identification of the read item, first time it was opened, how long it was read for, reading context, etc.)

An innovative collection interface

To optimise the collection conditions, particularly in terms of tracking reading actions in real time, and facilitating panellist participation, we will develop a dedicated mobile application.

This ergonomic and intuitive system will make it possible to scan or photograph the barcodes of the newspapers or magazines to avoid a complex data entry, timestamp or even to geolocate the consultations.

The interface will be designed so that all the information is collected in several tens of seconds. It will benefit from Kantar experience of similar protocols.



(example app screen)

- **Reconciling data derived from the panel with the new survey**

The data collected in the time based module will make it possible to model reading behaviours in terms of number of chances to view a title (or group of titles) and in terms of its speed of audience accumulation. This information will then be passed on individuals at the base station in an ascription phase after segmentation. This segmentation will aim to group individuals by their reading pattern to help us set up models on these segments.

In addition to these two items of data sent by ascription to the base station individuals, it involves calculating, for each title and each individual, the probability of it being LDP (AIR) or LNM reader of the title.

All the information required to calculate coverage indicators and a new GRP – now enhanced with consultations taken into account – will be available for individuals at the base station and those working on the Premium over-samples. For an advertising insert in one issue of a title, the GRP may be greater than the coverage whereas today, these two indicators are equal.

We will also be able to calculate the speed of coverage increase for an issue of a title using this new model, comparable with the data available for digital.

The visit of the average issue reader given the opportunity to view will take place retaining the coverage data levels by reference readership figures.

3 Launching the new system

The launch of the new system will be subject to a preliminary testing protocol:

- **On the base station:**
 - Implementation of the Brand First Approach (Brand-Centric)
 - Set up of the single source panel

The protocol is based around 3 phases:

- **A preparatory phase** (Sept/Oct): to test several formulations, types of screen, organisation of the questionnaire, validating its fluidity, clarity, approval, etc. explore versions for quality testing.
- **A quality phase** (Nov/Dec): to validate the wording used to present and ask the filter question from the two test versions: filter in one pass versus filter in two passes
- **A quantitative phase on a sample of 4,000** (Jan/Feb): to validate the entire system
 - Base: drop-out rate, duration, readership figures...
 - Single source panel: reports to base, optimise the recruitment process to maximise participation, and so on

Finally, specific technical committees are being set up with ACPM, CESP, Kantar and Médiamétrie to fine-tune various actions (print/digital fusion, setting up the time based panel, media planning, etc.).

The ACPM Technical Committee will validate each step before its implementation.

The study is planned to start on 1 July 2018, with first results expected 6 months later in the first quarter of 2019.

4 Conclusion

At the time you read this document, the tests will be in the process of being rolled out.

These tests will be decisive in defining the final design of the measurement system.

We are attempting to replace this process with a pragmatic approach that takes into account the main innovations that have recently been developed worldwide, while adapting them to the specific conditions of the French market and the budgetary constraints that are imposed on us.

The aim is to transform the current ONE survey into a true measurement hub for print brands, together with optional, modular approaches, using a solid reference base for print and digital media.

We must also look to the near future and make this new NRS perfectly adaptable to the inevitable shift of audience and media planning measurement for publishers, which is currently based on a shared currency, to a measure that can take into account audience planning and the qualification of third-party data so that we can integrate programmatic offerings with high added value over the long term.

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