
The future of readership measurement: measuring total audience

From measuring print towards
measuring reading



NOM (Nationaal Onderzoek Multimedia)

- **Joint Industry Committee** (newspapers, magazines, advertisers, media buying agencies)
- Long tradition (syndicated surveys since 1962)
- Nowadays 2 main surveys:
 - NOM Print Monitor – national readership survey
 - NOM Doelgroep Monitor – single source consumer survey
 - NOM Print & Doelgroep Monitor – combined data, media & consumer
- Collaboration with other JIC organisations (Media house)
- Audit bureau for circulation and digital census data (from 2015)

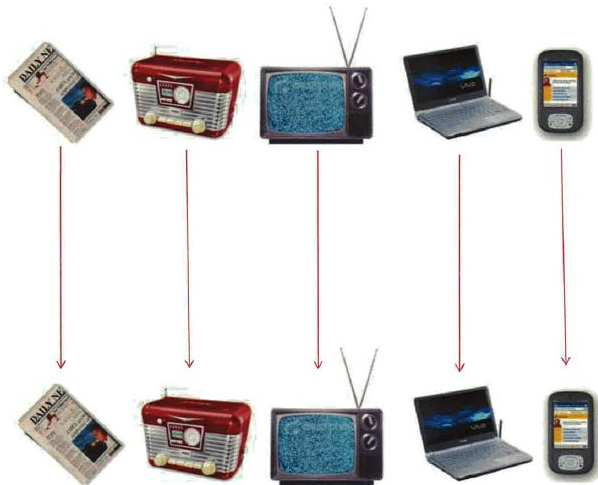
Not newspapers and magazines, but brands

- Publishers are nowadays delivering their content on different platforms, not only on paper.
- They ask providers of audience data to report audiences of their total footprint, not only readership of paper editions.
- Different countries are looking for different solutions - there is no universally accepted solution yet; cultural differences and differences in audience research and media planning traditions play an important role.

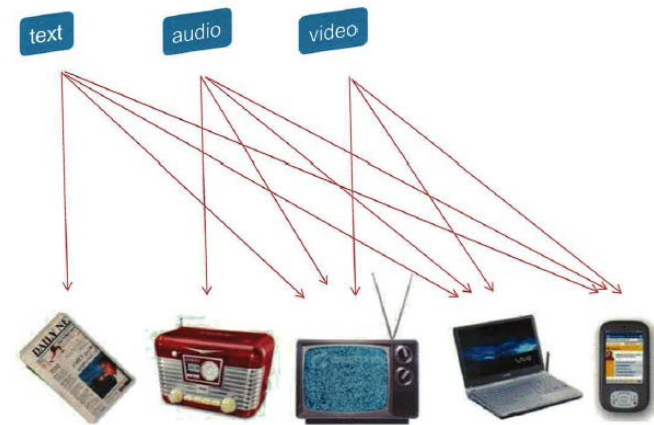
From measuring print towards measuring reading

- In 2014 NOM (Joint Industry Committee for national readership survey in The Netherlands) has changed the scope of its measurement from readership of printed editions of newspapers and magazines into measuring total readership of newspaper and magazine brands.

print – radio - tv



reading – listening - viewing



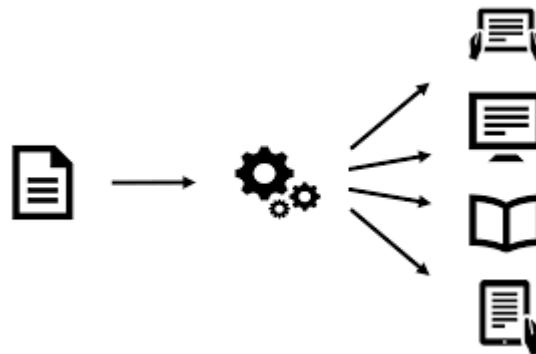
Goal: mediaplanning of media brands

NOM chose the following approach:

- Fusion of audience surveys for print and digital

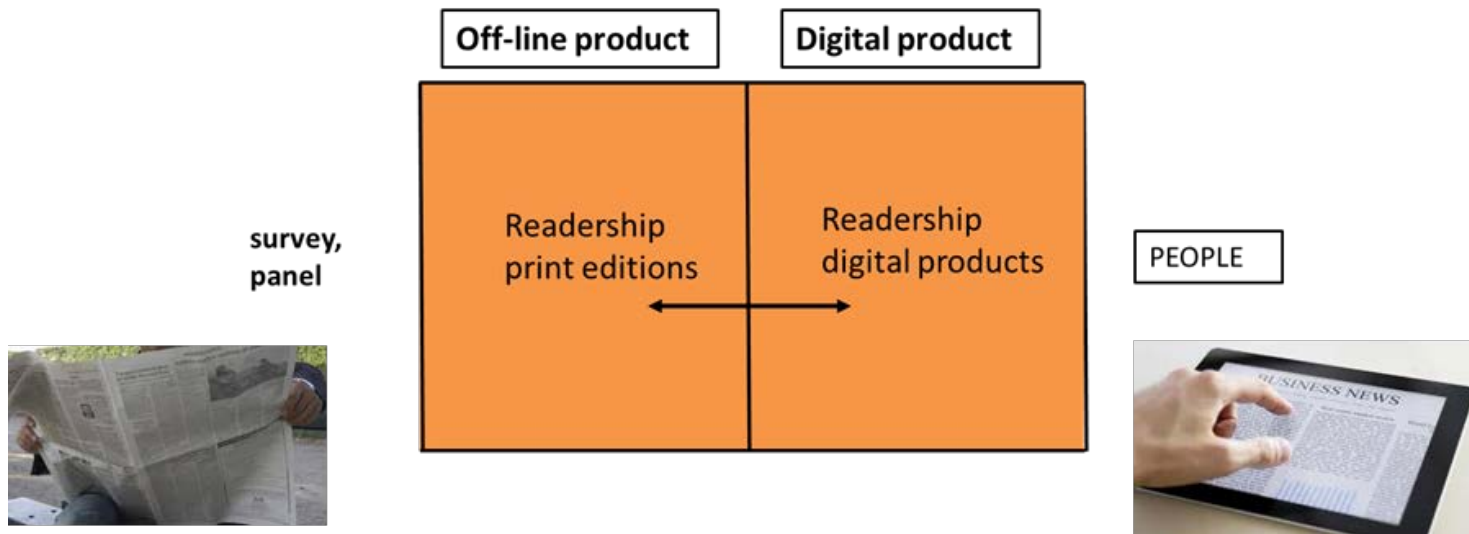


- Backed up by single source measurement in the national readership survey (hooks)



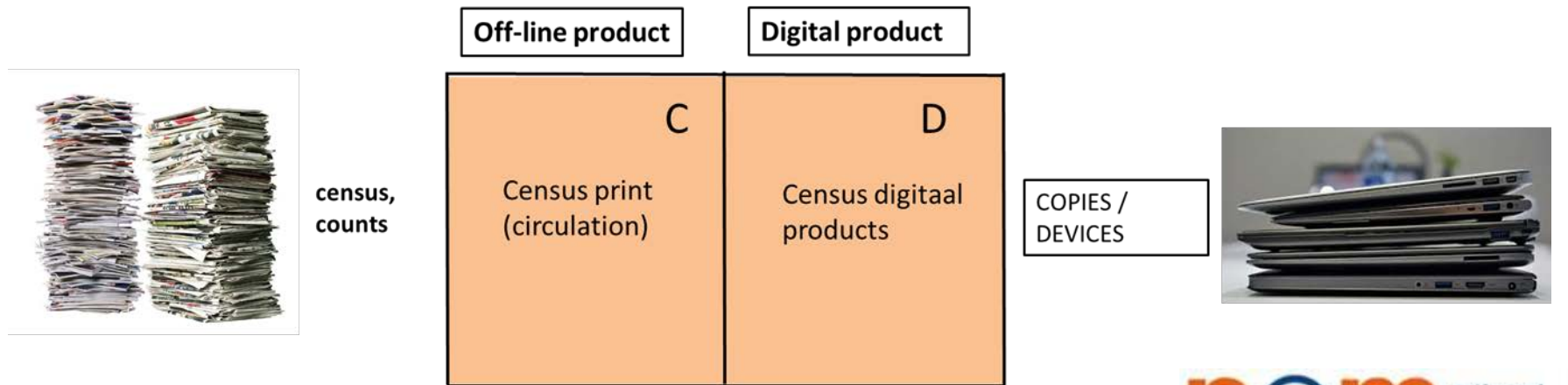
Total readership – data sources

- Fusion of print and internet audience surveys
- Which data sources are available:

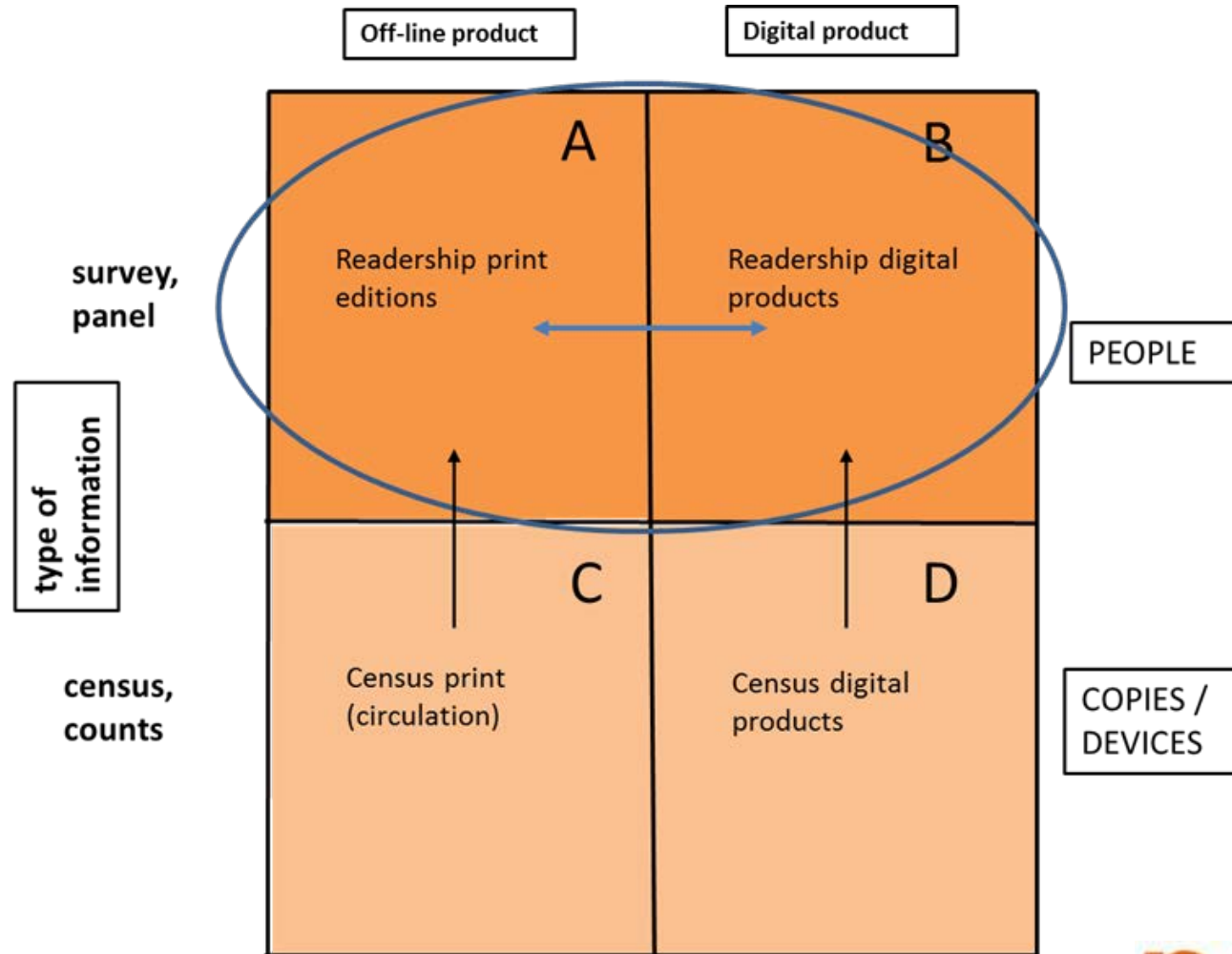


Problem: small brands

- Problem with measuring small brands reliably in panels of internet audience surveys (DDMM, NOBO)
- Future problems in readership surveys – smaller samples (cost reduction)
- Additional data sources are necessary
- Census data (circulation) can be obtained for big and small brands – this can be used to fill the gaps of audience surveys



Model: readership data backed up with census data



→ Data integration hooks necessary



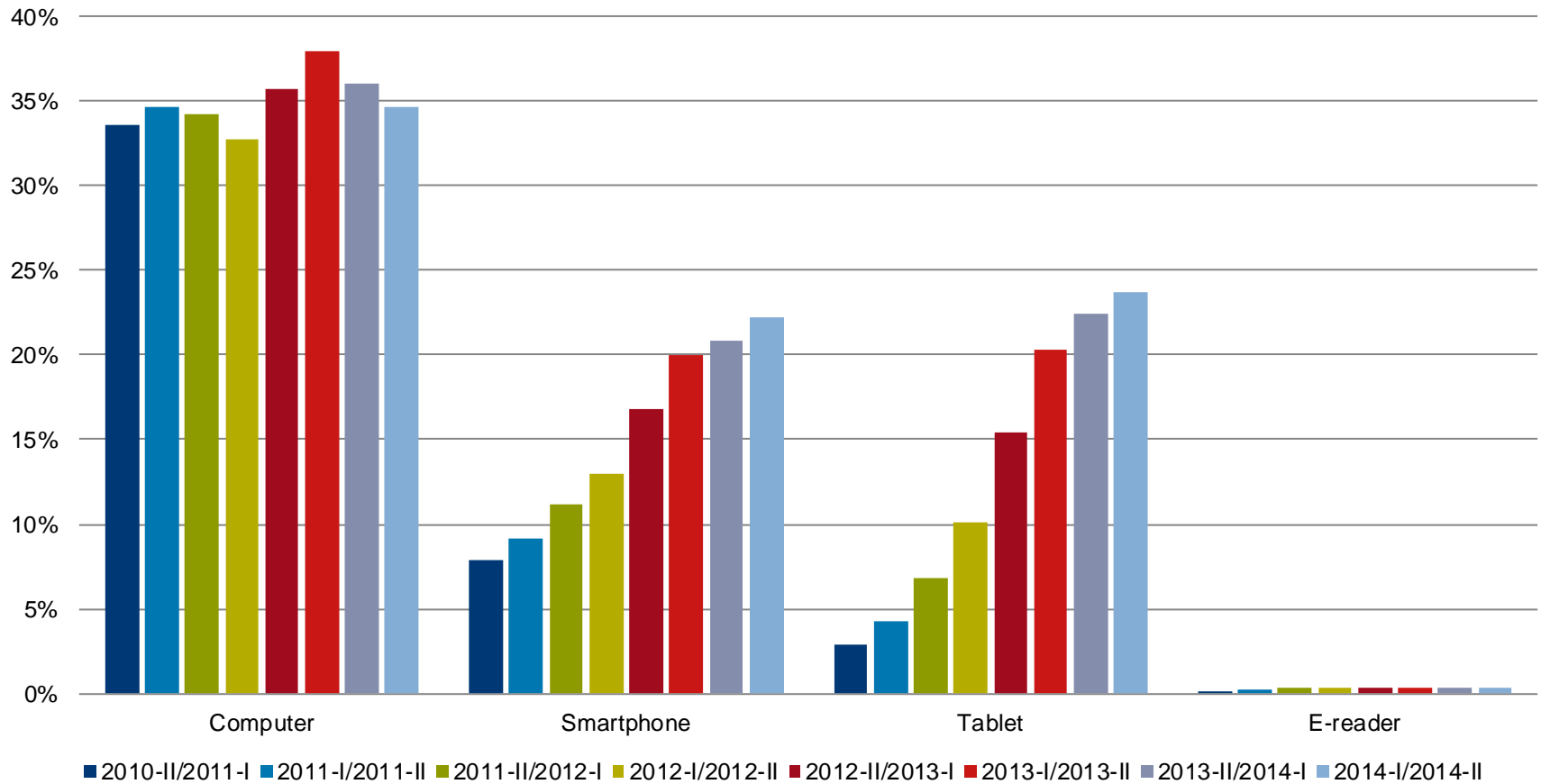
Step 1: single source information in the readership survey, preparing for fusion



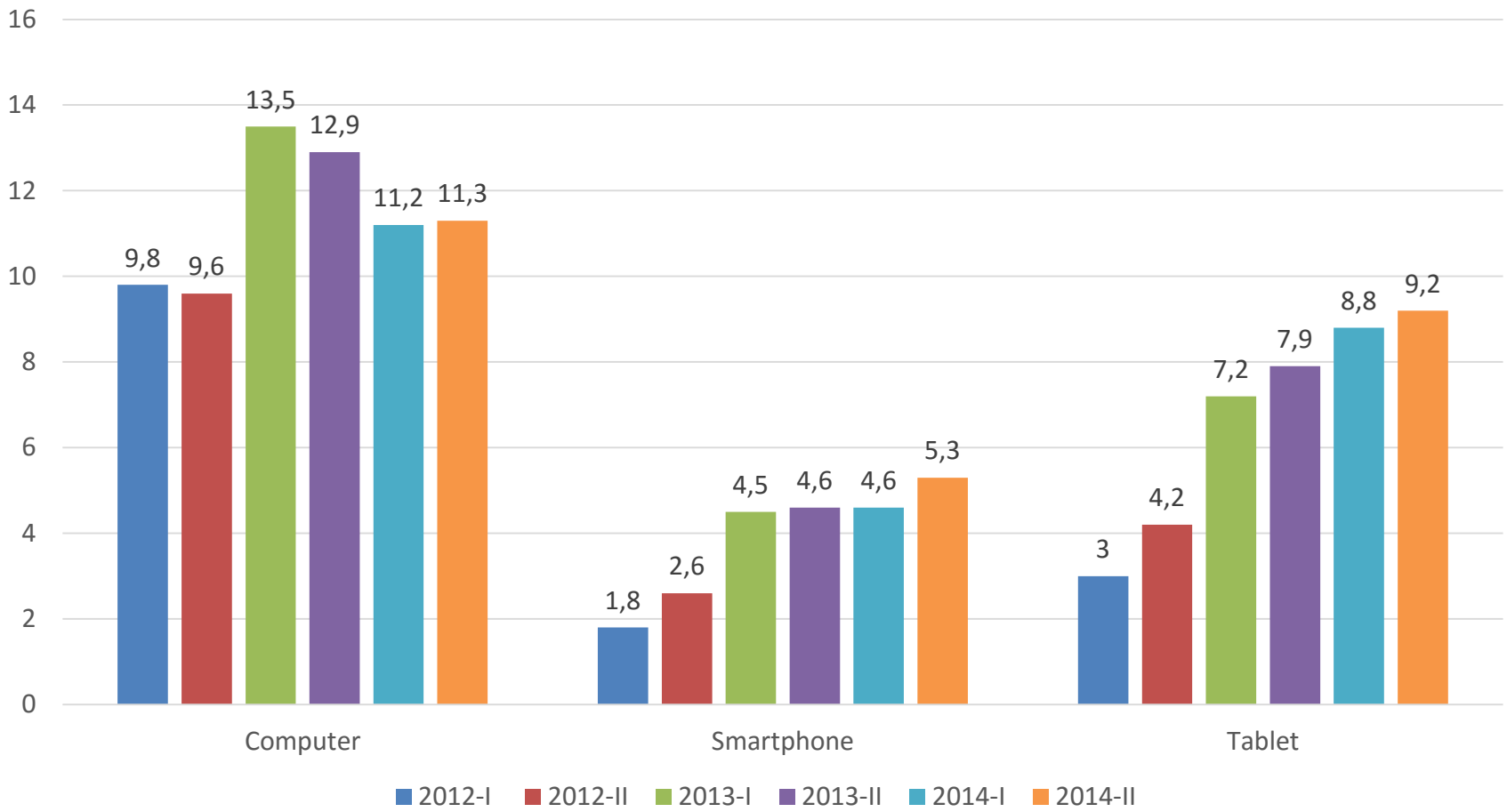
Introducing hooks in the national readership survey

- Since 2012 questions about reading on digital platforms in Nom Print Monitor (aggregated level)
- Since January 2014 detailed questions about reading on digital platforms for 10 magazine and 10 newspaper brands
- Since January 2015 new design of the survey: filter question for paper / digital reading for all the brands

Growing penetration of digital reading of newspapers



Growing penetration of digital reading of magazines



Questionnaire until 2015



Brand filter paper only



Specific issue readership paper editions



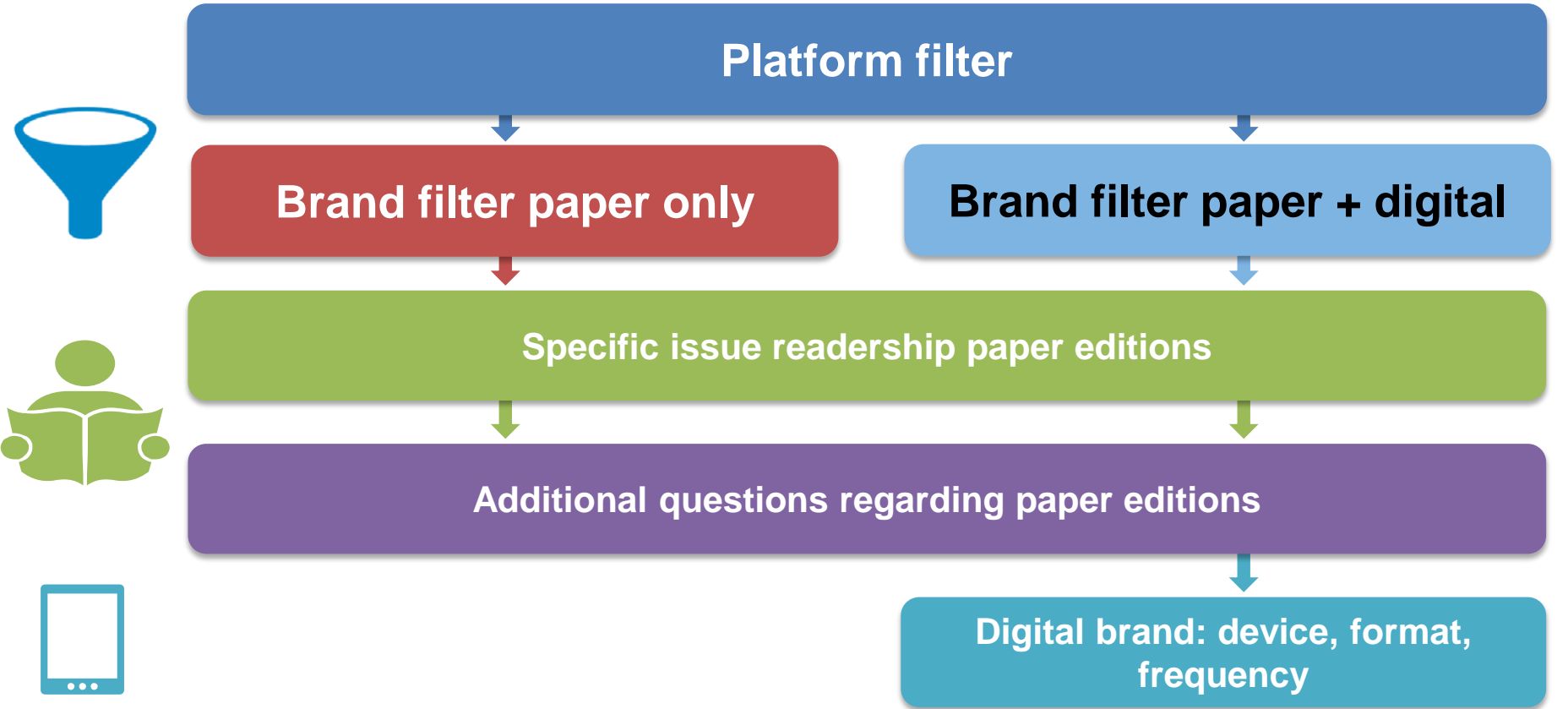
Additional questions regarding paper editions



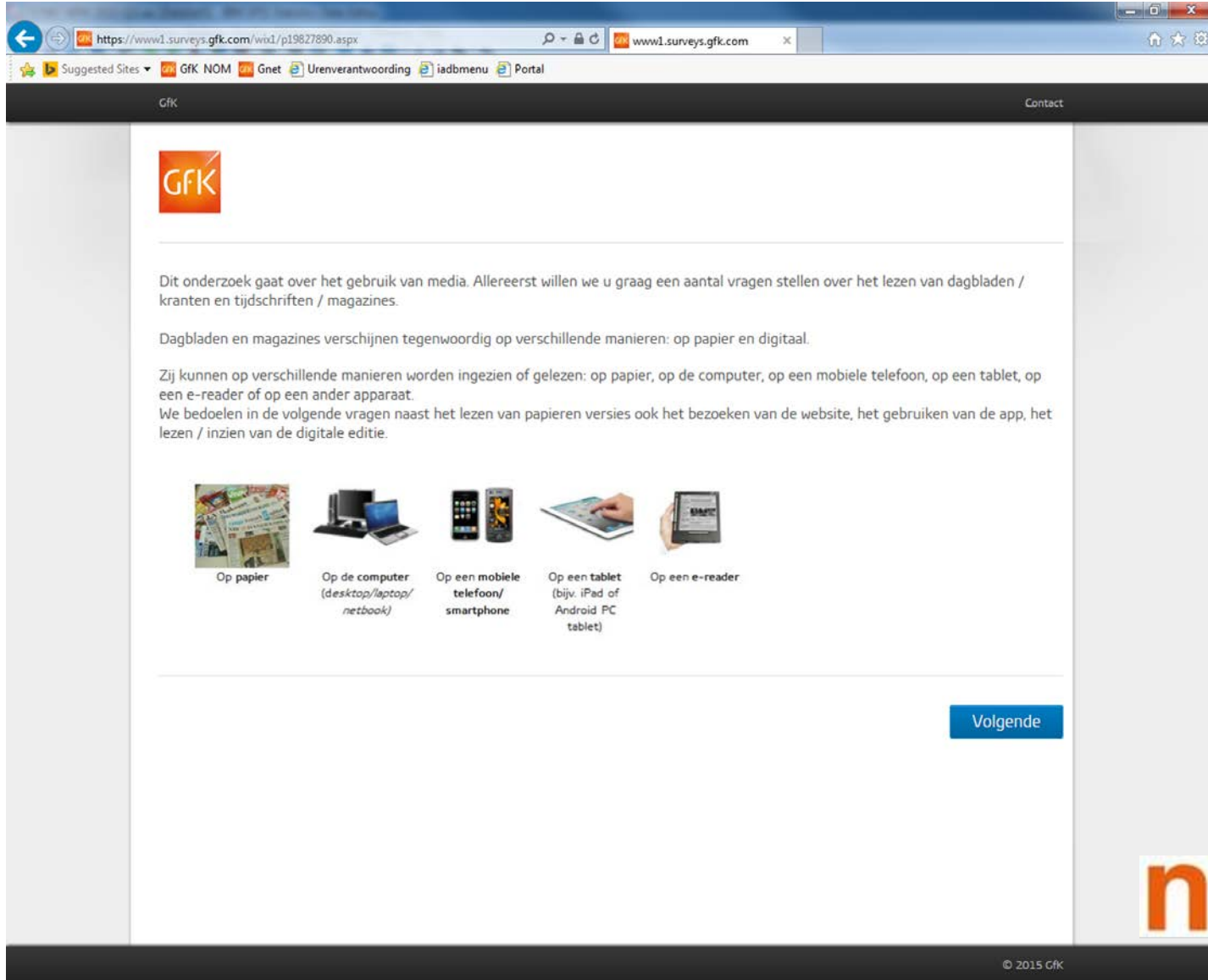
Digital reading



Questionnaire per 2015



Explanation of platform filter



The screenshot shows a web browser window with the URL <https://www1.surveys.gfk.com/wid/p19827890.aspx>. The browser's address bar and tabs are visible at the top. The page content includes the GfK logo, an introductory paragraph about media usage, a list of platforms, and a 'Volgende' button.

GfK

Contact


GfK


Dit onderzoek gaat over het gebruik van media. Allereerst willen we u graag een aantal vragen stellen over het lezen van dagbladen / kranten en tijdschriften / magazines.


Dagbladen en magazines verschijnen tegenwoordig op verschillende manieren: op papier en digitaal.


Zij kunnen op verschillende manieren worden ingezien of gelezen: op papier, op de computer, op een mobiele telefoon, op een tablet, op een e-reader of op een ander apparaat.


We bedoelen in de volgende vragen naast het lezen van papieren versies ook het bezoeken van de website, het gebruiken van de app, het lezen / inzien van de digitale editie.

 Op papier

 Op de computer
(desktop/laptop/
netbook)

 Op een mobiele
telefoon/
smartphone

 Op een tablet
(bijv. iPad of
Android PC
tablet)

 Op een e-reader

[Volgende](#)

nom nationaal
onderzoek
multimedia

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Platform filter

The screenshot shows a web browser window with the URL <https://www1.surveys.gfk.com/wix1/p19827890.aspx>. The browser's address bar and tabs are visible. The survey page has a dark header with 'GfK' on the left and 'Contact' on the right. The main content area features the GfK logo at the top left. Below the logo, the survey question is: 'Op welke manieren heeft u in de afgelopen 12 maanden (minstens één keer) een tijdschrift / magazine gelezen of ingezien?'. Underneath the question, it says 'Meerdere antwoorden mogelijk'. There is a list of seven options, each with a checkbox: 'Op papier', 'Op de computer (desktop/laptop/netbook)', 'Op de mobiele telefoon/smartphone', 'Op een tablet', 'Op een e-reader', 'Op een ander apparaat', and 'Geen van deze'. The 'Op papier' and 'Op de mobiele telefoon/smartphone' options are selected. At the bottom right of the form area, there is a blue button labeled 'Volgende'. The footer of the page contains the copyright notice '© 2015 GfK'.

GfK

Contact

GfK

Op welke manieren heeft u in de afgelopen 12 maanden (minstens één keer) een tijdschrift / magazine gelezen of ingezien?

Meerdere antwoorden mogelijk

- Op papier
- Op de computer (desktop/laptop/netbook)
- Op de mobiele telefoon/smartphone
- Op een tablet
- Op een e-reader
- Op een ander apparaat
- Geen van deze

Volgende

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Brand filters



Platform filter

Brand filter paper only

Brand filter paper + digital

Reading PAPER
Yes/No

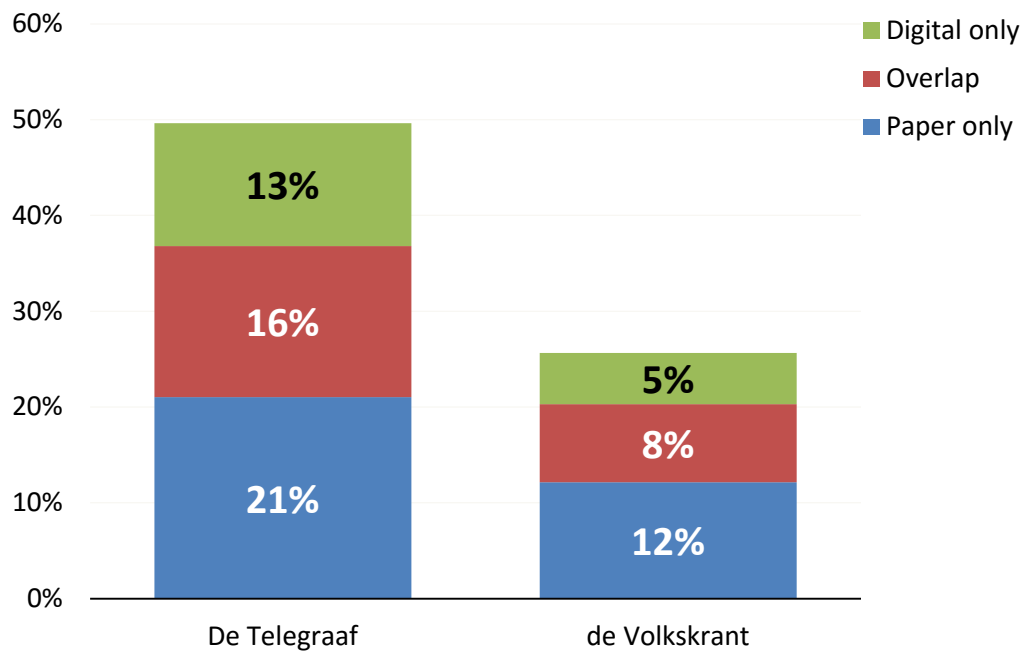
Reading PAPER
Yes/No

Reading DIGITAL
Yes/No

GfK	Panel Website	Privacy	Bladen in de afgelopen 12 maanden (minstens één keer) gelezen	
			ja	nee
	Flow		<input type="radio"/>	<input checked="" type="radio"/>
	Santé		<input type="radio"/>	<input checked="" type="radio"/>
	Yoga Magazine		<input type="radio"/>	<input checked="" type="radio"/>
	Psychologie Magazine		<input type="radio"/>	<input checked="" type="radio"/>
	gezondNU		<input type="radio"/>	<input checked="" type="radio"/>

GfK	Panel Website	Privacy	Bladen in de afgelopen 12 maanden (minstens één keer) gelezen			
			PAPIER		DIGITAAL	
			ja, op papier	nee, niet op papier	ja, digitaal	nee, niet digitaal
	Psychologie Magazine		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	gezondNU		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Flow		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Happinez		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Het Vermoeden		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Santé		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Types of results



For each brand

- Total readership of the brand
- Total readership per platform
- Unduplicated readership per platform

Did we do it right?















Consistency of answers

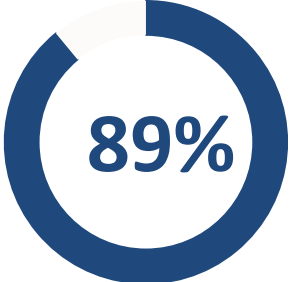
Platform filter

Brand filter paper only:
33%

Brand filter paper + digital:
67%

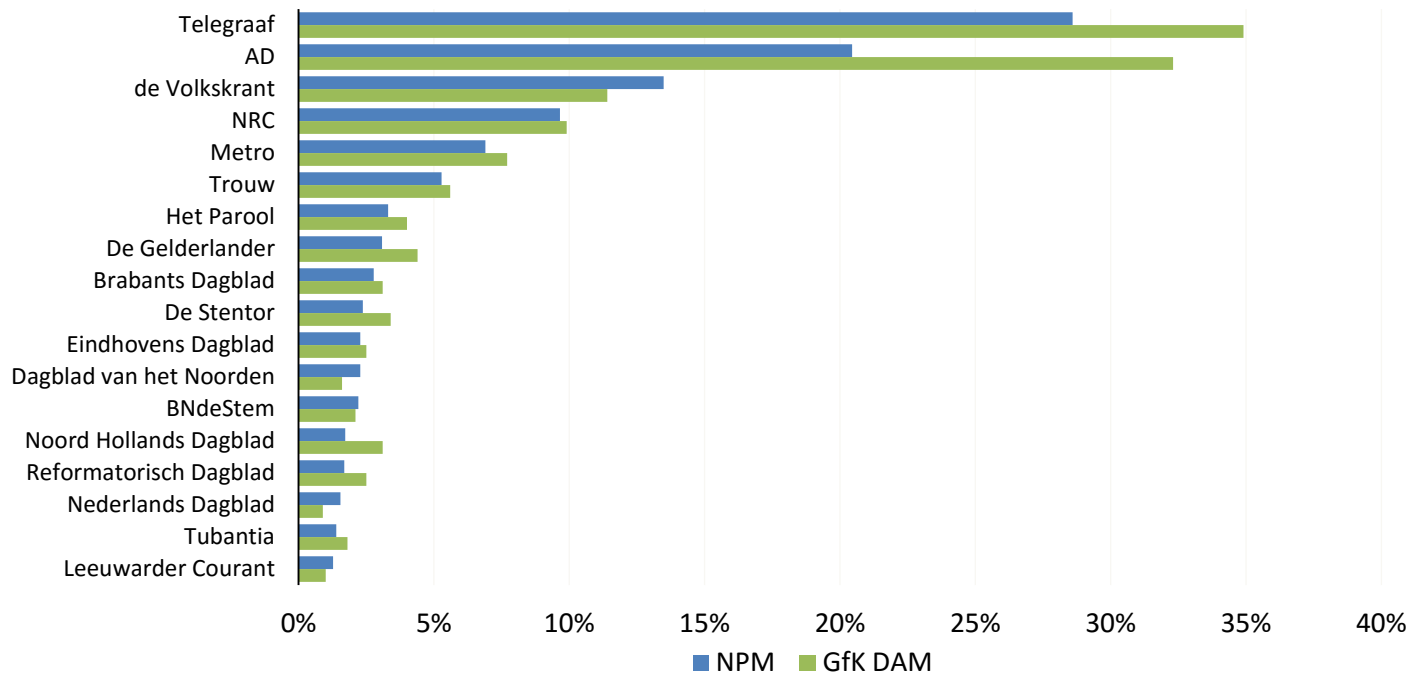
GfK Panel Website Privacy		
Heeft u de onderstaande bladen in de afgelopen 12 maanden (minstens één keer) gelezen of i		
	ja	nee
 Happinez	<input type="radio"/>	<input checked="" type="radio"/>
 Flow	<input type="radio"/>	<input checked="" type="radio"/>
 Santé	<input type="radio"/>	<input checked="" type="radio"/>
 Yoga Magazine	<input type="radio"/>	<input checked="" type="radio"/>
 Psychologie Magazine	<input type="radio"/>	<input checked="" type="radio"/>
 gezondNU	<input type="radio"/>	<input checked="" type="radio"/>

GfK Panel Website Privacy				
Heeft u de onderstaande bladen in de afgelopen 12 maanden (minstens één keer) gele				
	PAPIER		DIGITAAL	
	ja, op papier	nee, niet op papier	ja, digitaal	nee, niet digitaal
 Psychologie Magazir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 gezondNU	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Flow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Happinez	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Het Vermoeden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Santé	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



89%

Results from NPM in line with passive measurement



Questionnaire produces valid results



Consistent answers

Answers to platform filter and brand filter match



Ranking in line with passive measurement

Cases of mismatch usually have identifiable causes



Reach levels in line with passive measurement

Respondents seem to report regular behavior



What were the consequences for print currency?



Comparison to previous publication

Daily newspapers

93

Read in past
12 months

94

AIR

Magazines

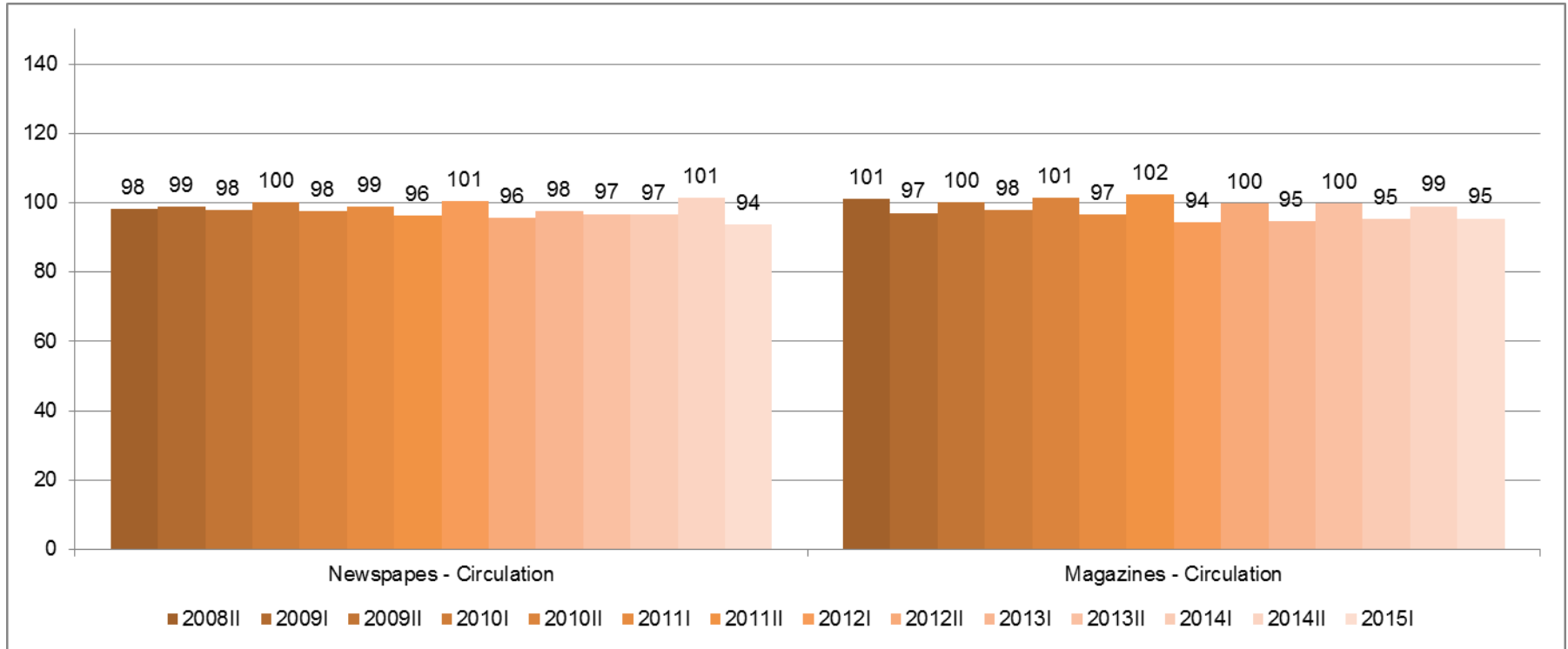
94

Read in past
12 months

94

AIR

Possible explanations: circulation



Possible explanations: questionnaire

- The new platform filter in the beginning of the questionnaire
- The addition of digital products in the brand filter for total readership in the past 12 months



		2014	2015
Paper + digital	% of sample	55%	67%
	# screen ins	12,6	11,6
Paper only	% of sample	45%	33%
	# screen ins	9,2	7,1

Further steps

- NOM Print Monitor is ready for fusion with internet audience data (hooks)
- Internet audience measurement needs the same hooks
- Data integration project:
 - How to use census data in order to improve / calibrate audience data
 - Fusion of readership data and internet audience data
- In the meantime NOM Print Monitor gives insight into reading of printed and digital editions of magazines and newspapers (single source, claimed behaviour): NOM Media Brands



Thank you!

Questions:

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