Latest developments in audience measurement:
The PDRF 2017 Review of Audience Research

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Abstract

In this time of ever-accelerating change, the PDRF's biennial Review of Audience Research takes stock of the latest developments in audience measurement around the world. The Review covers over a hundred different general population readership surveys. For some it is business as usual, but many are facing the double challenge of the demand to measure more and cost less. The main themes noted in the 2017 PDRF Review are driven by these pressures. While there are numerous examples of cost cutting measures, surveys are also striving to provide more cross-platform audience measurement, and the techniques to do so continue to evolve. Furthermore, several surveys have ambitious programmes to deliver granular measures "beyond Average Issue Readership" with the intention of enhancing the planning process and value delivered to advertisers.

Details for each survey are published in the 'Summary of Audience Research' section of the PDRF website. Specialist readership surveys are also included. The Review provides an overview of the different techniques and questions in use, allowing different surveys to be compared.

Introduction and acknowledgments

The 2017 PDRF Review of Audience Research covers:

- 101 general population readership surveys in 80 different countries
- 42 specialist audience surveys, e.g. businessmen, children, specific issue readership etc.

The 101 general population surveys included in the Review between them carry out 2.2 million interviews and provide audience estimates for almost 23,000 publisher brands.

It would not be possible to compile the Review without the help of the many contributors from around the world who take the time to update their survey details in the PDRF's online database. On behalf of the PDRF, our thanks go to all the contributors. I would also like to thank Jennie Beck, Jenny Davis and Andrew Green for their advice regarding contacts and new surveys.

This paper will cover:

- New surveys and re-launches
- The main themes and developments since 2015
- An overview of the methods of readership measurement
- Developments listed country by country.

Overview of developments

The themes noted this year are:

- Increasing pressure to cut costs. This has prompted sample size reductions for some surveys. Others have reviewed their sampling sources and methods with a view to cutting costs.
- More use and testing of online access panel samples, albeit with a number of cautions.
- The ongoing increase in the use of CAWI. Six surveys are now conducted wholly by CAWI and a further 27 use it as one of their data collection methodologies, to very varying degrees.
- The need to adapt CAWI surveys for mobile completion.
- Several surveys have undertaken the delivery of data that goes "beyond Average Issue Readership" to provide more granular data to inform the planning process.
- Developments in cross-platform audience measurement continue. In particular, a number of surveys are using/testing passive measurement of their participants' digital reading, in some cases primarily to inform the data integration process with other sources of digital audience data.
- More surveys are converting to a brand-first measurement approach.

Surveys with major changes

Before discussing the development themes in more detail, the following surveys have reported major changes since 2015:

- In **Belgium** following a tender process in late 2015/early 2016, **CIM Press 2016-2019** has been extended beyond the classic NRS. A SMS panel has been set up to deliver data to feed into a model of Estimated Day Readership (EDR) for daily newspapers. Cover recognition questions for magazines have been added to the main NRS and will be used as the basis to model Estimated Issue Readership (EIR) for magazines, in addition to the standard measure of Average Issue Readership. Audience accumulation data will also be modelled and provided for the magazines.

- **MEDIApuls** in **Bosnia** is now a mixed methodology survey. It was a telephone survey, but the 19,000 interviews are now collected by a mix of CAPI, CATI and CAWI. The CAWI interviews are sampled from an online panel.

- In **France**, the **One Survey** has moved to 100% CAWI data collection since July 2016, and has changed its universe definition to adults aged 15+ with access to the Internet, the first survey to explicitly exclude non-internet users.

  Meanwhile, the next contract has been awarded to Kantar, in partnership with Mediametrie, to provide a "unified measurement of print and digital". A number of major developments are planned:
  - A brand-first approach
  - The survey will integrate a 'premium' target group, previously survey separately
  - A single-source panel will be set up to passively measure digital reading, in order to inform the data integration process with Mediametrie digital audience data, particularly in respect of duplication of reading between print and digital
  - There will also be a time-based panel of 4,000 participants who will record their reading behaviour over a period of 9 days, by scanning/photographing barcodes
  - There will be more frequent (monthly) reporting, supported by data from the time based panel
  - Modelling techniques will be used to produce estimates for small and regional titles, drawing on circulation data
  - An engagement module will be incorporated in the main survey
  - TGI will be fused with the Survey, to provide more detailed marketing and consumption data.

- In **Greece**, **BARI** has a new data collection methodology. The previous face-to-face CAPI interview has been replaced with a two stage interview. The first interview is by CATI, and the second by CAWI. The CATI interview covers newspapers, other media consumption, demographics and marketing data and some "hook" data for the magazines. The CAWI stage which follows (for the same participants) covers magazines and websites.

- In **Ireland,** a new **JNRS** contract has been awarded to Millward Brown, and fieldwork recommenced in February 2017. The main development will be a fusion with comScore data in order to provide total brand reach estimates. comScore are in the process of upgrading to 'Tier 2' in Ireland as part of this development. A quota sample has been trialled, but the sample has reverted to random probability for the next six months.

- In **Norway**, newspaper, magazine and digital measurement have been integrated into new contract, which starts from 2018. Newspaper readership will continue to be collected by CATI, but will change to a brand-first approach to measure all platforms. Magazine readership will be measured by CAWI with a device agnostic approach. Total brand reach for all publisher brands will be reported, with the digital audience estimates calibrated to match comScore. TGI data will be connected with external data and analytic systems.

- In **South Africa** a new one year **PAMS** readership study contract was awarded by the PRC (representing newspaper, magazine and online publishers) in November 2016. PAMS is a face-to-face survey of 10,000 households conducted by Nielsen, which will be fused/multi-based with the Establishment Survey.
  The Establishment Survey is conducted by Kantar TNS and went live in July 2016. The annual sample size is 25,000 face-to-face CAPI interviews.

- In **Switzerland** the intention is to set-up a cross-media 'Swiss Media Data Hub' (SMDH) as a shared project between press, TV, and radio research, with the objective of measuring digital reach across all three. It is intended the SMDH will replace NET-Metrix, the current online research JIC, in 2018/9. The next incarnation of the **MACH** survey will therefore be as the 'Total Text' component of the SMDH.

- In the **United Kingdom** the **Audience Measurement for Publishers (AMP)** survey will be launched in February 2018, replacing NRS. Data on the duplication of reading between print and digital has been collected passively from a panel of participants recruited from the main survey and will be used to inform a data integration with comScore. Provision of a respondent level data file from comScore for all platforms will enable a full reach and frequency panning facility for mobile as well as pc/laptop platforms.

Main themes

Pressure to cut costs

The most apparent result of the pressure to cut costs is the number of surveys reporting reductions in sample, including surveys in Brazil, Czech Republic, France, Netherlands, New Zealand, Peru, Portugal, Romania, Spain and the Ukraine.

As will be discussed in the next section on interview mode, another way in which some surveys are cutting costs, or investigating cutting costs, is by changing their sample methodology, including the use of online panel samples.

Interview mode: the trend towards use of CAWI continues

There are now 33 surveys which collect at least a portion of their interviews using CAWI, up from 23 in 2015, and 15 in 2013.

It is worth noting, that as Table 1 below shows, there are still more surveys that use a personal interview mode, either pen and paper or electronically assisted. Furthermore, some of the surveys which use CAWI still use other interview modes for the majority of their sample, as will be discussed in more detail below.

An overview of the data collection methodologies used for the 101 national readership surveys are summarised below in Table 1.

Table 1: Overview of mode of interview

	Surveys
Personal - pen and paper	33
Personal - CASI, CAPI, DS-CAPI, HAPI, TAPI, mobile 'phone	19
Self-completion – paper	3
Telephone	6
CAWI	6
CAWI for magazines (newspapers by CATI)	2
Mixed methodology involving CAWI:	
• Largely CAWI (80%+ interviews)	3
• Partial CAWI (30-79% of interviews)	14
• Some CAWI (less than 30% of interviews)	8
Mixed methodology without CAWI	7

Nine surveys have introduced CAWI interviewing and a further three have increased the proportion of CAWI interviews taken, including the One Survey in France which has become 100% CAWI, and is the first survey to exclude explicitly non internet users from its universe definition.

The surveys introducing at least an element of CAWI interviewing are:

- In **Bosnia**, the **MEDIApuls** was a telephone survey, but the 19,000 interviews are now collected by a mix of CAPI, CATI and CAWI. The CAWI interviews are sampled from an online panel.
- In **Egypt, Qatar, Saudi Arabia** and **United Arab Emirates** the Ipsos **NRS** Surveys are now mixed methodology, with half the interviews continuing to be face-to-face, and half now by CAWI, sampled from the Ipsos online panel.
- In **Germany, ag.ma** now takes 1,000 boost interviews from an online panel, in addition to the 35,000 face-to-face interviews by CASI.
- In **Greece,** the relaunched **BARI** survey conducts the newspaper interview by telephone and the magazine interview by CAWI.
- The **TGI** in **Ireland** has been evolving its methodology and now takes 49% of interviews via an online panel. The remaining 51% are recruited by CATI.
- The **TGI** in **Israel** also now draws 60% of its sample from an online panel.

As Table 1 shows, across the 33 surveys which now use CAWI, the ways in which CAWI is used are very various as a proportion of total interviews:

- Six surveys are now conducted wholly by CAWI (**Austria MA Media Analyse; Canada SSPD; France One Survey; Netherlands NOM; New Zealand Roy Morgan** and **Slovenia TGI**). In some cases, a portion of the CAWI completion may be in-home with the interviewer present in order to facilitate the inclusion of participants who are not internet users e.g. **MA Media Analyse** and **NOM**.

- A further two surveys use a CATI interview for newspaper readership and conduct the magazine readership interview wholly by CAWI (**Finland KMT** and **Greece BARI**).

- Three surveys are largely conducted by CAWI with the facility for a small proportion of interviews to be taken off-line, so as to include non-Internet users. These three surveys are **emma** in **Australia**, **Index Danmark** in **Denmark**, and the **Magazine NRS** in **Norway**.

- A further 14 surveys take between 30-79% of their interviews by CAWI, in mixed methodology solutions.

- Finally, there are eight surveys which take 25% or less of their interviews by CAWI. These surveys may be using CAWI as one of a number of completion options available to encourage participation, or using it in a very specific way, as for instance with ag.ma who take a very small proportion of their interviews via an online access panel to boost certain sample groups.

The other major area of difference is in how these 33 surveys recruit their sample for the interviews taken by CAWI.

Most of the 33 recruit “offline” by telephone or in-home, often by random methods, with online simply as the interview mode. However, 14 of these 33 surveys that have told us they draw some sample from an online access panel. Some surveys purposefully use a mix of access panel sample and sample recruited offline. A longstanding example of this is NOM in the Netherlands.

More use of online panel samples

As noted above, 14 surveys now explicitly note some use of online panel sample, and there may be others also using some online panel sample. Although numbers are still low as a proportion of our 101 surveys overall, it does represent an increase on 2015. A number of other countries have been testing use of online access panels:

- Four surveys take a substantial amount of their sample (60% or more) from an online access panel. These are **The Magazine NRS** in **Norway**, **NOM** in **The Netherlands**, and the **TGI** in the **UK** and **Israel**.
- Four of the Ipsos Middle Eastern **NRS** surveys and **TGI** in Ireland now take around half their respective samples from a panel.
- Three further surveys take between 10 and 25% of their sample from an online access panel.
- **SSPD** in **Canada** and **ag.ma** in **Germany** take small boost samples from online panels.

One reason to source sample from an access panel is of course to cut costs, as the costs of recruiting sample "offline" to complete online will be considerably higher. There can be other motivations, however. In some cases, as in Canada and Germany, online panel samples are being used to boost samples of particular demographic groups who are less likely to respond to the main survey mode. Another attraction can be that online panel samples offer the possibility of a relatively compliant pool of participants for further research e.g. passive measurement of reading, as being tested by Ipsos in the Middle East.

The principal drawback of access panels is the extent to which they are able to represent the population in respect of reading and other media behaviour. Participants willing to "opt-in" to be members of an online access panel will represent a very small percentage of the population. Recruitment and incentivisation methods vary considerably by panel and are highly relevant to the quality of the panel and any particular skews observed in the panel sample. The most apparent skew is usually to heavy internet users. Atypical media behaviour in the sample is complex and unlikely to be fully 'corrected' by applying weights by demographics and weight of internet use. At PDRF we have had a number of papers report reporting tests of online panel samples, including work which shows how various the readership estimates yielded by different panel samples can be. Several useful papers can be found listed in the references to this paper[i ii iii].

More recently tests have been conducted in Switzerland, in parallel to the standard MACH survey, which were reported at the EMRO conference earlier this year[iv]. As MACH already uses a CAWI questionnaire for a portion of participants recruited by phone, the questionnaire was directly comparable. Fieldwork went well in practical terms. Analysis of the samples achieved showed that while there were no major differences in respect of socio-demographics, which had been controlled by quota, there were differences in terms of use of the internet and personal interests and psychographics, both between the two access panels and in relation to a comparable sample from MACH. Readership levels also differed between the three samples. The access panel samples both indicated higher reach for magazines than MACH, but lower reach for newspapers. The conclusion was that the access panellists tended to be heavy internet users with rather different spread of interests to the CAWI probability sample. They therefore read a somewhat different menu of titles and read them less regularly; especially those that provided news and information that were readily available elsewhere on the internet.

Ag.ma also reported tests with two online panels at this year's EMRO conference[v] which highlighted varying differences in the estimates produced. For the time being Ag.ma report that use of online access panel sample will be limited to providing a modest boost of 1,000 CAWI interviews among underrepresented target groups, in addition to the 35,000 face-to-face interviews by CASI.

The Spanish have also been testing online panels as a source of sample for the EGM. The results of the initial test were not encouraging, as readership estimates from the panel were markedly out of line with those obtained by the face to face EGM. Further parallel tests have been carried out with a questionnaire designed specifically for online completion. The results of this work will be presented in Madrid[vi].

It is experiences such as these which create caution. In some cases the online panel sample will not be taken further. In other cases there will be compromises to offset the risk of skews in the online access panel sample, usually by blending a portion of online panel sample with sample recruited offline in other ways. Using sample from several different online access panels may also somewhat mitigate the risk of the particular skews present in a single panel due to its recruitment methodology.

As noted above, there are now at least two surveys using an access panel sample to boost the samples of the particular demographics least likely to respond to the standard methodology, such as 15-24 year olds. This brings some technical benefits by increasing the samples available for analysis in the sub-group concerned and reducing the weights required to gross the sample to represent the population. However, although the sample taken may be small, there is still a question-mark as to how representative the members of that cohort who have opted to join an online panel will be.

Past PDRF conferences have included papers considering how the drawbacks of online panels might be overcome. One approach that has been explored, and not just in the media measurement context of course, is how weighting might be used to make online panels more representative[vii]. Another approach is to consider panel recruitment and how that might be designed to provide a sample which is sufficiently representative for media measurement purposes. The latter approach is currently being considered in South Africa, and we will hear a paper on this subject in Madrid. While perfect solutions are unlikely, no doubt the increasing pressure to consider online access panel samples will prompt further work in this area.

Optimising surveys for completion on mobile 'phones

Given the transition to CAWI interviews in some countries, it is not surprising that a number have highlighted work to optimise their surveys for mobile completion.

In Norway, for instance, 40% of CAWI participants now complete on a mobile 'phone. In The Netherlands, last year the percentage of participants completing the NOM survey on a mobile phone was 11% on average, but went from 8% to 15% over the course of the year[viii].

In these scenarios it is important to have questionnaires which are "mobile friendly", easy to complete, not overly long and with the questions and visual prompts displayed as intended. This is no mean challenge given the heritage of detailed question structures and lengthy media lists most readership surveys must manage. Surveys which have reported work in respect of optimising surveys for mobile completion are:

- In **Finland** the **Kansallinen Mediatutkimus (KMT)** is planning a test of a mobile optimized survey for magazines.

- In the **Netherlands**, work has been carried out in this field by **NOM**, looking at differences in readership data according to the device used to complete the survey. A paper on this will be given in Madrid[ix].

- In **Norway** the **Magazine NRS** has 90% of interviews completed by CAWI, and a device agnostic approach was introduced in Q3. 2016. The survey and its interface are customised to whatever device the participant uses to complete the survey.

- In **Spain, EGM** have undergone intensive development work to adapt their questionnaire for online, and, in particular, mobile completion. Ipsos have developed a modular design which splits the questionnaire into different media consumption sections. Each section lasts between 5 and 10 minutes and an incentive is awarded at the end of the whole interview. This work will be presented in Madrid[x].

Beyond Average Issue Readership: developing more granular measures of readership

Despite sharing the cost pressures most face, several surveys have undertaken the delivery of data that goes beyond Average Issue Readership. This might be by measuring specific issues read, number of contacts with those issues, actual time spent/proportion read, and audience accumulation over time. The intention is to put print audience reporting more on a par with that of other media in respect of likely contacts with advertising.

The countries of note in this respect are:

- In **Belgium CIM** will deliver three new more granular measures to the market in addition to AIR[xi]:
  - Estimated Day Readership (EDR) for dailies. A new SMS panel report their daily newspaper reading, and these data feed into the EDR model, along with circulation data.
  - Estimated Issue Readership (EIR) for magazines. EIR is modelled as a variation on AIR for the magazines, using circulation data and cover recognition data from the main interview.
  - Audience accumulation over time will be modelled for the magazines, also based on the cover recognition questions.

- In **France**, the contract for the next **One Survey** has recently been awarded and includes a number of major developments and extensions to the Survey[xii]. These include the provision of data on actual contacts (or GRPs) and audience accumulation. These data will be modelled based on a panel of 4,000 participants who will record their reading behaviour over a period of 9 days by scanning/photographing barcodes. This will capture the specific issue read, first time of reading, repeat reading, time spent reading, reading context etc.

- In **Germany ag.ma's** 'Mediascan' data have been in use since 2015[xiii], based on a separate panel of 2,000 participants. The panel scan barcodes to capture their readership of newspapers and magazines over a two week period. \time spent reading, number of pick-ups, accumulation of readership over time etc. are recorded. The objective of the Mediascan data is to provide:
    - A measure of ad page exposures (previously this had been derived from copy tests for selected magazines, and was sometimes criticised as being biased towards regular readers)
    - Time-based performance metrics.

The renewed focus on such work is likely to be spurred by the need to compete more effectively in a digital world. Given the financial pressures faced by publishers, it demonstrates some strength of demand for these data in the markets concerned.

However, past experience is that such data are not always used extensively in practice. For instance, in their paper to be given in Madrid[xiv], the Norwegians note that Content Exposure Probabilities (CEPs) for newspapers, which were designed to provide a better estimate of how many people will see an ad placed in a newspapers, have not been widely used, and that in 2016 measurement of content categories and page traffic were removed from Forbruker & Media. The Swedish 'Orvesto Day' project[xv] providing daily newspaper readership no longer reports, and in the Netherlands the 'Opportunity to See Advertising' project was not renewed[xvi].

The provision of such measures, however eagerly demanded, are a real test of whether users are prepared to adapt their commercial practices to use the data to their full potential.

Cross-platform audience measurement

Not surprisingly this continues to be a key area of development for many surveys.

Overall, 75 of our 101 surveys now include some measure of digital reading alongside and in combination with print readership estimates. The ways of doing this and the basis on which estimates are published are very various, with three main approaches:

- Asking questions
- Fusion, calibration etc. with passive measures
- Including passive measurement in more holistic solutions

Most of surveys ask participants questions about their digital reading. The most likely scenario is for these estimates based on participant recall to be published at face-value, though sometimes they are used as an aid to data integration.

The difficulties of participants recalling, or even knowing, the full scope of their digital activity, particularly occasional or one-off visits, are well-known. Several papers in Madrid will explore the gap between what participants say they do online, versus what they actually do when their activity is measured by passive means. Distinguishing between the different platforms a brand can be accessed on is particularly difficult, even when care is taken over wording and explanations, and the SSPD in Canada will report on some work they have done in this respect in Madrid[xvii].

Fusion/calibration with passively collected digital readership measurement is an alternative solution to provide a cross-platform audience database. If the source of the digital audience data is the official or quasi-official currency, this method avoids putting a competing set of digital audience estimates into the market.

In total, there are now 23 surveys using some form of data integration in order to report digital estimates collected separately by passive means. A number of others are currently testing fusions.

These data integrations may be a fusion/calibration with comScore, Nielsen or some other source of digital audience data. In some cases, the passive measurement is carried out by the same organisation running the readership survey, e.g. the TGI Clicksteam data in the UK and China.

In the 2015 Review, we noted several examples of measurement systems being developed in such a way as to facilitate data integration and improve the outputs, particularly with respect to understanding and reflecting duplication of readership between print and digital. Examples were the new AMP service in Great Britain, the Premium Survey in France and the MACH survey in Switzerland. All of these surveys were finding ways to measure their participants' digital reading by passive means, in order to provide single-source data. However, the intention was not to publish these digital reading data as estimates in their own right but to use them to provide a better understanding of participants' behaviour than was possible via recall data alone, particularly with respect to duplication of reading between print and digital.

The AMP single-source all-device panel will be the subject of several papers in Madrid[xviii xix].

The French will present a paper on their use of passive digital measurement in respect of The Premium Survey[xx]. Furthermore, plans for the next contract for the One Survey in France[xxi] include a single-source panel, with participants recruited from the main survey. The panel's digital reading will be passively measured in order to inform the data integration process with Mediametrie digital audience data, particularly in respect of duplication of reading.

A number of further surveys have reported work to test passive measurement of their participants' digital behaviour, including SSPD in Canada and the Ipsos NRS surveys in the Middle East. Papers including these developments will be given in Madrid[xxii xxiii].

The desire for single-source data on duplication of reading between print and digital platforms is prompted by the need to validate/calibrate the duplications achieved by data integration. In the case of fusion, even with good links, there will inevitably be some regression to the mean, and sample sizes may not be large. The difficulty of confidently representing duplication between platforms is compounded if there are different passive panels to measure different devices, e.g. separate pc, mobile and tablet panels, as then duplication between the devices will also not be directly observed. If duplication between platforms is not well represented, this will have implications for the total brand reach estimates and reach and frequency planning outputs.

Brand-first questionnaire designs

As noted above, most of our surveys now ask participants questions about their digital reading, even if the estimates are not for publication. The most usual scenario is for questions about digital reading to be asked after the questions about reading in print. However, there is a growing trend to asking questions alongside print.

In some cases this is to include digital editions i.e. the pdf equivalent of the print publication, within the estimate for print. A recent example of this is the update from the NOK in Hungary where since 2016 the digital versions of newspapers and magazines are measured in combination with (but not distinguished from) print. NOK's recency question is: "When did you read any copy (print and/or digital pdf formats) of the title?"

More broadly, a number of surveys report adopting a 'brand-first' approach. A brand-first design involves the initial 'screen-in' question being for all types of reading, i.e. in print or digital or both. Once reading of the brand as a whole has been established, different strategies are adopted to arrive at measures for each of print and digital.

There are a number of reasons for introducing a brand-first approach:

- To enable digital reading claims to be collected for the full media list with as little impact as possible on participant load i.e. participants do not have to go through the media list several times.
- To ask the readership questions in more natural way for participants who read across platforms (though not all do).
- To minimise the risk of over-claims for print, if participants have read the brand in digital and wish to make a positive claim, but are not given an option to do so alongside the option for print.

Surveys which have told us they are using a brand-first approach, or plan to do so in the near future, are:

- **CIM** in **Belgium**
- **SSPD** in **Canada** was launched in 2015 as a brand-first survey
- **France** plans to use a brand-first approach for their new survey starting in mid-2018
- **Audipresse** in **Italy** report they have introduced a brand-centric approach
- **NOM** in the **Netherlands**
- In **Norway** the newspaper survey, **Forbruker & Media**, will use brand-first from 2018 for their CATI interview
- In **Romania SNA FOCUS** report they have introduced a 'total brand' approach
- In the **United Kingdom** the new **AMP** survey has adopted a brand-first approach
- **GfK MRI Mediamark** in the **USA.**

Methods of readership measurement

Details of the techniques used to measure readership can be found in the Summary, both survey by survey and in an overall summary spread sheet. The following is an overview of the some of the main findings as to the techniques in use. Further information is available in the archive of past symposium papers on the PDRF website, as well as in the Summary itself.

Readership model

The technique most surveys use is the Recent Reading model. Two surveys currently use Specific Issue Reading as the basis of an AIR measure for magazines (**NOM** in the Netherlands and **emma** in Australia). No surveys use Through the Book.

Title prompts

Publications are prompted as follows:

	Surveys
Grouped title mastheads	9
Single title mastheads	57
Magazine covers	6
No mastheads (typescript or telephone)	21
Spontaneous day after recall	2
Not stated	8

Of the surveys using mastheads and covers as prompts, 31 explicitly state that they use colour.

The screen-in question

Most (85) of the surveys have a separate screen-in filter question, with specified screen-in periods as follows:

	Surveys
Past/last 12 months	34
Past year	4
Past 6 months	7
'In the last months'/ 'few months'	2
Different periods used by publication frequency, ranging from past 7 days to past 12 months	38

Of the 16 surveys without a specific screen-in question, six use frequency as a filter, and one uses recency as a filter.

The recency question

The majority of surveys disclose to the respondent the options for the crucial recency question, but for 15 surveys the options are hidden.

The order of presenting publications is fixed (by publication frequency) for 47 surveys. Most surveys rotate the order of presenting titles within publication group.

The frequency question

There are a great variety of ways in which this question is asked, though the most common form of scale is a pure numeric scale, as shown below. The number of options within the frequency scale varies considerably, ranging from 3-12 points.

	Surveys
Numeric	70
Verbal	5
Verbal with some numeric explanation	14
Mixed numeric/verbal	4
Frequency not used/ or specific issue	8

Source of copy and readership engagement questions

Of the 101 surveys, the majority (71) include quality of reading/engagement questions. Source of copy is the most popular choice of question, followed by time spent reading.

Country updates

Afghanistan – NRS

The NRS is now measuring 92 publisher websites.

Austria – MA Media Analyse

In 2016 a test was run measuring e-papers.

Belgium – CIM Press Survey

The classic NRS survey continues to be a survey of some 10,000 participants, mostly interviewed by CASI, and covers reading of print, digital editions and web.

However, as part of the evolution of the survey, and following a tender process in late 2015/early 2016, 'CIM Press 2016-2019' has been extended beyond the classic NRS and structured around seven modules implemented by Ipsos. This design has been created in order to provide the more granular measures of Estimated Day Readership (EDR) for dailies and Estimated Issue Readership (EIR) for magazines, in addition to the standard measure of Average Issue Readership.

The seven modules are:

- Module 1: NRS survey
- Module 2: A separate SMS panel with 3,000 participants to collect daily dated daily readership data for newspapers across their various platforms. CIM reports a 86% completion rate by day.
- Module 3: An audience accumulation study for magazines. This study is based on specific issue readership questions asked within the main NRS survey, prompted by showing four recent covers. Magazine AIR continues to be based on the recent reading method, rather than cover recognition.
- Module 4: Newspaper daily reach model. Data from the SMS panel feed into the EDR model, along with circulation data.
- Module 5: Magazine issue reach model. EIR is modelled as a variation on AIR for the magazines, using circulation and cover data.
- Module 6: Magazine accumulation model based on the cover recognition questions.
- Module 7: Press brands reach calculation, to be supplied by means of a fusion with a digital audience estimate provider database.

A paper on the modelling approaches developed to produce these measures will be given in Madrid[xxiv].

Bolivia - Estudio General de Medios (EGM)

This survey is new to the Summary and is a face-to-face interview, with a sample of 5,000. It now covers digital readership.

Bosnia – MEDIApuls

MEDIApuls in Bosnia is now a mixed methodology survey. It was a telephone survey, but the 19,000 interviews are now collected by a mix of CAPI, CATI and CAWI. The CAWI interviews are sampled from an online panel.

Brazil – EGM Multimedia

The scope of the survey has scaled back from 13 to 9 metropolitan areas with a corresponding drop in sample from 52,809 to 36,048. However, it has also been a time of development with a data fusion of online reading estimates.

Canada – Single-Source Print and Digital Study (SSPD)

The SSPD was launched in 2015 to provide single source measurement for all newspapers and magazines, reporting cross-platform readership based on recall.

A paper will be given in Madrid outlining ongoing developments[xxv]:

- SSPD is completed by CAWI, with participants recruited by telephone. Some particular groups prove more difficult to recruit than others, and a number of approaches are being taken to address this, including recruiting some 18-24 year olds via online panels

- A test of a seven-point recency scale was carried out, before reverting to a three-point scale.

- Qualitative work has been carried out with the objective of improving the questions about reading on digital platforms. In recognition of the difficulties for participants in recalling the extent of their digital reading behaviour in detail, the readership question sequence has been changed. Rather than asking straightaway about specific platforms, the sequence begins with a broader question about accessing any digital content. More detailed questions then reference 'usual' behaviour, as more likely to accord with the way participants answer questions about accessing digital content.

- There have been developments to improve the product survey.

- Finally, a trial of a cookie based approach to passive measurement is underway, based on a sub-set of participants to the main SSPD survey, with the end goal of merging passive data with recall data to provide cross-platform estimates.

Czech Republic – Market & Media & Lifestyle - TGI

MML NET has been introduced. This is a complementary survey that describes the online behaviour of a respondent from a media and consumption point of view. It covers a wide range of websites, not just online media.

The sample has decreased from 15,000 to 8,567 and the proportion of interviews taken by CAWI has increased to 30%.

Czech Republic – Media Projekt

Media Projekt reports Quality of Reading work in 2015 plus a CAWI method test, also in 2015, although the interview is still by CAPI.

Egypt – NRS

A mixed methodology has been introduced. Half the interviews are now collected online, using sample from the Ipsos online panel. Half the interviews continue to be conducted face to face.

Finland - Kansallinen Mediatutkimus (KMT) (National Readership Survey)

Replica (pdf) copies of newspapers have been added to the questionnaire.

Next to be tested will be a mobile optimized version of the current CAWI survey for magazines.

France – One Survey

The One Survey has moved to 100% CAWI data collection since July 2016, and has changed its universe definition to adults aged 15+ with access to the Internet, the first survey to explicitly exclude non Internet users.

The sample has been reduced from 35,000 to 30,000 interviews since January 2017. In addition, there is now only one research institute involved (there were two formerly).

Also noted is the modification made to the specialised (separate) Premium survey to include passive measurement of online print (both web and apps, on pcs, phones or i-pads). This will be described in a paper given in Madrid[xxvi].

The most recent news, however, is that after a tendering process the next contract for the One Survey has been awarded to Kantar, in partnership with Mediametrie, to provide unified measurement of print and digital. The new study is planned to start in July 2018, after a phase of testing starting in September 2017, with the intention of reporting six months later in the first quarter of 2019.

The new study will interview 28,000 participants by CAWI, recruiting them by telephone. A number of major developments are planned, as we will hear in Madrid[xxvii]:

- The survey will adopt a brand-first approach.
- The survey will integrate a 'premium' target group (currently surveyed separately) by means of a boost sample of 4,000 top executives/affluents. In combination with the overall sample, this should yield a sample of 9,000 top executives/affluents for analysis.
- A single-source panel will be set up, with participants recruited from the main survey. The panel's digital reading will be passively measured, in order to inform the data integration process with Mediametrie digital audience data, particularly in respect of duplication of reading between print and digital data.
- There will also be a time-based panel of 4,000 participants who will record their reading behaviour over a period of nine days, by scanning/photographing barcodes. This will capture the specific issue read, first time of reading, repeat reading, time spent reading, reading context etc. The objective is to provide data on actual contacts (or GRPs) and audience accumulation, bringing the print measurement more in to line with the data available for other media.
- There will be more frequent (monthly) reporting, supported by data from the time-based panel.
- Modelling techniques will be used to produce estimates for small and regional titles, drawing on circulation data.
- An engagement module will be incorporated in the main survey.
- TGI will be fused with the survey, to provide more detailed marketing and consumption data.

Germany - Media-Analyse ma Pressemedien

There has been the introduction of 1,000 CAWI interviews from an online panel to boost samples of underrepresented target groups, in addition to the 35,000 face-to-face interviews by CASI. In order to facilitate this development, new and unified CASI/CAWI software has been developed.

The 'Mediascan' data are now in use, based on barcode scanning to capture usage of newspapers and magazines over a two week period.

Greece - BARI/National Readership Survey

BARI has a new data collection methodology. The previous face-to-face CAPI interview has been replaced with a two stage interview. The first interview is by CATI, and the second by CAWI. The CATI interview covers newspapers, other media consumption, demographics and marketing data and some "hook" data for the magazines. The CAWI stage which follows (for the same participants) covers magazines and websites.

BARI has also released multi-platform time-based planning software (print and website by brand).

Hungary – NOK

The length of the questionnaire was reduced from 40 minutes to around 25 minutes, to enhance the response rate.

The digital versions (pdf format) of newspapers and magazines are also measured from 2016 in combination with (but not distinguished from) print. The recency question is: "When did you read any copy (print and/or digital pdf formats) of the title?"

India – Indian Readership Survey

The new survey has been in creation for some time with a number of delays to the release of estimates. Most recent reports were that data would be released in Quarter 3 2017.

Ireland – JNRS

A new contract has been awarded to Millward Brown, and fieldwork recommenced in February 2017.

The main development will be a fusion with comScore data in order to provide total brand reach estimates. comScore are in the process of upgrading to 'Tier 2' in Ireland as part of this development.

A quota sample has been trialled, but the sample has reverted to random probability for the next six months.

Ireland - TGI

The TGI in Ireland has been evolving to a mixed methodology. Previously the sample was previously in part CATI (70%) and in part random location (30%). It is now 51% CATI, with the remaining 49% of interviews taken via an online panel.

Israel –TGI

The TGI in Israel now draws sample from an online panel. 40% of sample is derived from RDD telephone recruitment, followed by a SC questionnaire, while 60% of sample is taken from the online panel.

Italy – Audipress

Audipress re-tendered in 2016 and was won by Ipsos and GfK. A new brand-centric question has been introduced.

Mexico – TGI

The TGI in Mexico now includes digital editions.

Mexico - Estudio General de Medios (EGM)

The development for the EGM in Mexico has been a fusion with comScore.

Netherlands - NOM

The NOM Print and Regional Monitors have merged. This means that 33 regional newspapers are measured within NOM, but will be published separately in NOM Regional Monitor. Estimates for combinations of regional newspapers are published in the NOM Print Monitor.

NOM has adopted a brand first approach in 2015. The latest development is the award to GfK of a contract to fuse NOM data with NOBO online published media brand consumption data. A paper about NOBO will be given in Madrid[xxviii].

Meanwhile the NOM sample has decreased by 2,000 to 17,000, 75% of which is now taken from an online panel, the remainder being a probability sample.

New Zealand – Nielsen Consumer & Media Insights (CMI)

CMI has introduced a mixed methodology. In 2015, 25% of the survey was moved online to capture a demographic that is hard to reach face to face and reduce the total survey cost. 25% of the online portion is recruited via CATI; the other 75% is recruited from an online access panel. Overall the sample has decreased from 12,000 to 11,000.

There has also been a major reduction to the length of the product/consumer/marketing portion of the survey by moving question sections to separate biannual online surveys.

A new cross platform reach and frequency tool called New Media Impact has been introduced. This provides a combination of television (currency), digital, newspaper (currency) and magazine (currency) level information for total reach and media planning.

The qualification of what constitutes reading has been reduced from two minutes to one minute.

Norway

Newspaper, magazine and digital measurement have been integrated into new contract, which starts from 2018. The key components are

- Newspaper readership will continue to be collected by CATI, but will change to a brand-first approach to measure all platforms.
- Magazine readership will be measured by CAWI with a device agnostic approach, introduced in Q3. 2016
- The total brand reach for all publisher brands will be reported, with the digital audience estimates calibrated to match comScore.
- TGI data will be connected with external data and analytic systems, including SSP/DSP systems

In the meantime:

The newspaper survey - **Forbruker & Media (Consumer & Media)** – has measured 100 e-papers since 2015.

The **Magazine NRS** has added source of copy and time spent reading to the questionnaire.

The **TGI**'s transition from paper self-completion continues, with 65% now completing TGI online.

Peru – TGI

The scope of the survey is now Lima alone (previously six other cities were included) which has resulted in a drop in sample size from 36,000 to 4,000.

Philippines - Nielsen Consumer and Media View

A new questionnaire has been rolled out, and the sample has increased to 10,000.

Portugal - Bareme-Imprensa

The sample has dropped from 15,000 to 10,000 since the last update.

Qatar - National Readership Survey (NRS)

A mixed methodology has been introduced with a portion of online interviews. Half the interviews are now collected online, using sample from the Ipsos online panel, and the other half continue to be face to face.

Romania – SNA FOCUS (NRS)

SNA Focus is now reporting "total brand" audiences. They measure all together the printed title, the website with the same brand and, if appropriate, the Facebook page for the brand and any other "brand extension".

The universe is now the entire population 14 - 74, not just those in urban areas. Annual sample has been reduced from 16,000 to 14,000.

Russia – National Readership Survey 2017

Print data are now fused with Web Index to generate cross-platform audiences.

Saudi Arabia – National Readership Survey (NRS)

A mixed methodology has been introduced. Half the interviews are now collected online, using sample from the Ipsos online panel. Half the interviews continue to be face to face.

Slovak Republic - TGI

MML NET has been introduced, a complementary survey that describes online behaviour, covering a range of websites which include media brands.

Slovenia

The NRS officially ceased to exist in 2016. There are at least three surveys covering print readership at the moment, but we are told none of them is considered to be a successor to NRS.

South Africa

A new one year PAMS study contract was awarded by the PRC (representing newspaper, magazine and online publishers) in November 2016.

The PRC have also co-funded a new Establishment Survey which is conducted by Kantar TNS and went live in July 2016 after more than six months of testing. It will report twice a year, and started doing so in March 2017. The Establishment Survey comprises 25,000 face-to-face CAPI interviews. It includes questions on media behaviour, though the ones about reading newspapers and magazines are not brand-specific.

Collecting readership by brand will be the role of PAMS. PAMS is a face-to-face survey of 10,000 households conducted by Nielsen, which will be fused/multi-based with the Establishment Survey. In Madrid we will hear a paper on the sampling techniques being used, and work towards recruiting as representative as possible an online panel for future readership surveys.

Spain- EGM

In common with numerous other countries, EGM has cut sample sizes for its multi-media and magazine surveys from 32,500 to 30,000 and 23,800 to 20,000 CAPI interviews respectively.

In recent years EGM has carried out a number of tests with a view to migrating from face to face CAPI interviews to a self-administered online methodology. The readership data generated from initial tests, and in particular an online access panel sample, were not encouraging. Readership estimates from the panel were markedly out of line (much higher) than those achieved by the face to face EGM.

However EGM has continued to look at ways to migrate to online interviewing in order to achieve cost savings, providing credible readership data can be collected. In Madrid, EGM will present a paper describing how they have developed a digital questionnaire divided into sections to allow participants to complete it on any device, including mobile, and complete the sections at separate times if that is more convenient[xxix].

Switzerland – MACH

The Swiss are working towards the set-up of the cross-media 'Swiss Media Data Hub' (SMDH) a shared project between press, TV, and radio research, with the objective of measuring digital reach across all three. It is intended the SMDH will replace NET-Metrix, the current online research JIC, in 2018/9. Furthermore, it will enable the transformation of the current individual media measurement surveys – into 'Total Text', 'Total Video' and 'Total Audio' surveys. The next incarnation of the MACH survey will therefore be as the 'Total Text' component of the SMDH.

Ukraine – MMI

The sample size has dropped from 20,000 to 14,000.

United Arab Emirates – National Readership Survey (NRS)

The NRS has introduced a mixed methodology. Half the interviews are now collected online, using sample from the Ipsos online panel. The remainder of the interviews continue to be collected face to face.

United Kingdom – Audience Measurement for Publishers (AMP)

The Publishers Audience Measurement Company (PAMCo) replaced National Readership Surveys Ltd in 2016, when a new measurement system for publisher audiences was piloted twice (February and September 2016). Live fieldwork commenced in January 2017. The new system is called Audience Measurement for Publishers (AMP) and the first data will be available in February 2018.

The AMP print survey is based on 35,000 face-to-face probability interviews per annum. Approximately 5,000 of the participants are recruited to install a light tracker app on all their digital devices – this is used to measure their reading of publisher content on those devices over a 28 day period as soon as possible after their print readership data to provide single-source data on their reading behaviour. The purpose of the AMP panel is to provide targets for duplication of readership between print and digital platforms. The AMP panel does not provide digital audience estimates for publication – these come from the UKOM approved digital audience estimate currency in Great Britain, which is comScore.

A fusion will be carried out between AMP and a respondent level data file provided by comScore with audience estimates for the pc/laptop, 'mobile phone and tablet platforms. Data from the AMP panel will be used to ensure duplication of reading between print and digital platforms is correctly represented.

A number of papers describing aspects of AMP will be given in Madrid. One provides an overview of the methodology and data collected so far[xxx], one covers the recruitment of the AMP panel[xxxi], and another compares the passive data collected by that panel with the digital reading behaviour claimed by those same participants in their original AMP interview[xxxii].

United Kingdom – JICREG

The new JICREG modelled readership estimates (with underlying data from the National Readership Survey) were released to the market in May 2016. A paper was given at the PDRF in London describing the data and modelling processes involved[xxxiii]. As well as the NRS data, data on pagination, the editorial/adverting ratio and presence of sporting teams is used in the model.

JICREG has also launched new software for users to access the data called JICREG Online, containing the new formulae and algorithms.

JICREG will continue to receive data from the new AMP survey in place of NRS data.

Vietnam – TGI

Formerly the Media Habits Survey, the question content has been redesigned in respect of readership and no longer asks about individual brands (previously 157 were specified). Instead there are general questions as to how many magazines have been read or looked at in the last month and how many newspapers have been read or looked at in the last 7 days. The amount of time spent reading newspapers and magazines on each of an average weekday and average weekend is asked. There are also other general questions on place of reading and usual place of purchase.

Four cities are now surveyed, instead of six, with a small drop in sample. Previously TGI was released annually, but it is now published every quarter for these four key cities.

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