ADVANTAGES OF A GLOBAL MULTIMODAL PRINT & DIGITAL READERSHIP SURVEY

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Introduction

Since 2012, the French advertising market has benefitted from the results of the new National Readership Survey called ONE, acclaimed for combining all press categories (magazines, national, regional and free dailies, as well as regional weeklies) within the framework of a single survey using a single methodology.

The methodology innovations of this new survey were presented in October 2011 at the Print & Digital Research Forum in San Francisco. At that time, the first wave of research was still underway and we did not have complete and final results.

This paper is therefore a continuation of the previous one, but at the same time demonstrating the impact of real life situations on results and the evolving needs of agencies, advertisers and publishers. Most importantly, it analyses digital changes and the impact of all devices, including smartphones and tablets, on readership measurements.

Confronting real life data has enabled us to further validate a survey that has been recognised by all the main actors of the French media market. This work could not have been done without the expertise of our various partners: Ipsos MediaCT (leading research company), TNS Sofres (joint fieldwork partner) and the CESP, the "French JIC" who, as a trusted third party, monitored, challenged and initiated a number of methodology changes with AudiPresse.

Our aim, therefore, is to present in a matter-of-fact way, the impact of methodology changes (such as online readership data collection) and how they affect the actual implementation of surveys and readership measurements. We will conclude with the challenging issue of digital readership measurement and how we intend to merge our results with other recognised internet and mobile data.

I. Methodology innovations put to the test

When launched in France, the NRS ONE included many methodological changes compared to preceding surveys. The first change concerned the format of the survey itself: the previous two surveys – one for the daily press, the other for magazines – were replaced by one single common survey. The majority of technological and methodological choices we made were a direct consequence of this change. For these two press categories, we had to preserve the quality of the preceding surveys, although they sometimes might seem contradictory. Such a profound change in methodology was, of course, also an opportunity to optimize costs.

The main novelty of the NRS ONE consists in breaking the survey down into successive phases – recruitment followed by survey implementation – without time or technical continuity. Recruitment is thus mainly carried out by telephone (90%), which optimizes the number of sampling points and their geographical distribution. Once interviewees are recruited, the questionnaire is either self-completed for web users using the CAWI system (80%), or traditionally conducted via a visit at home by an interviewer who uses a double screen CAPI.

The implementation of the survey included a series of tests carried out before launch, but also more recently in order to verify the robustness of the protocol.

1.1 Results of the 2010 quantitative test

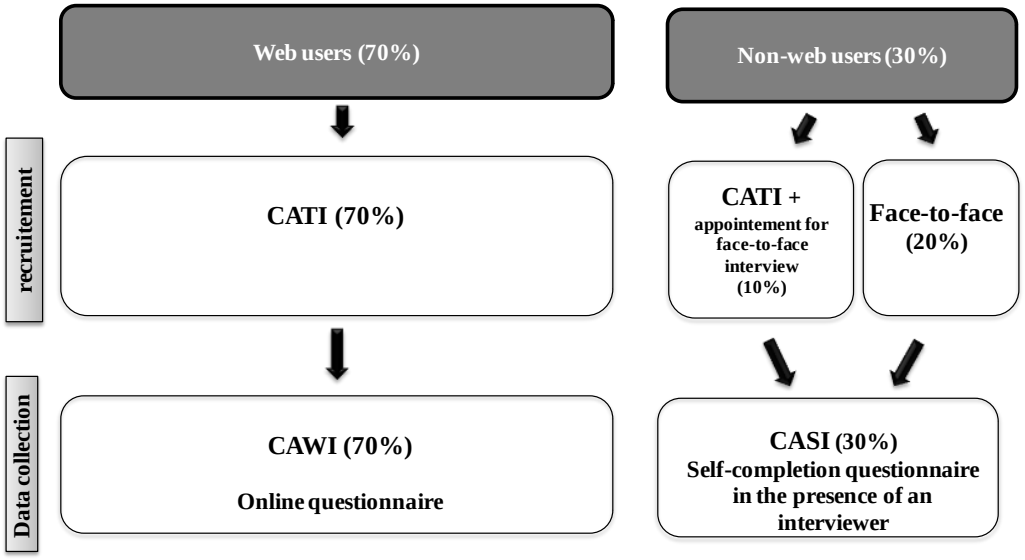
Following the qualitative test carried out by Ipsos MediaCT which mainly concerned the online questionnaire, a quantitative test was organized by Audipresse in May-June 2010. This test about the NRS ONE methodology was carried out in parallel with two Press readership surveys (EPIQ for dailies and AEPM for magazines).

The main objective of this test was to check the relevance of the approach, particularly the rate of return of online questionnaires and the quality of the respondents' sample.

4,000 people were interviewed with the new NRS ONE protocol in order to evaluate the impact on readership results of methodology changes.

In the test, 80% of people were recruited by telephone and 20% face-to-face. Web users[1] were asked to answer via internet (70%); non-web users (30%) were interviewed via a CASI[2] system.

Diagram of the Survey ONE scheme tested in 2010



The readership results were compared over the same period using samples of equivalent size (AEPM: 3,984 interviews, EPIQ: 4,360 interviews in May and June 2010).

Before starting this analysis, the socio-demographic structure of the sample was checked for conformity with the theoretical data and for comparability with the samples of the EPIQ and AEPM surveys over the same period. The comparison was based on the web user and non-web user populations.

The comparison of results was based on the following main indicators:
- Last 12 month readership
- Average Issue Readership
- Regular readers
- Occasional readers

Overall, the analysis covered 412 titles common with EPIQ (38 titles per reader on average) and 162 titles common with AEPM.

a) Impact on daily press and regional press readership

For the daily press and the weekly regional press, the analysis concerned the aggregate of each of the press categories. Tables below compare the test results with those of the EPIQ readership survey.

Last 12 month readership	**EPIQ 2010 V3**		**TEST ONE 2010**	
Total population (thousands)	*50,579*	*100%*	*50,579*	*100%*
At least one regional daily	39,401	77.9%	42,276	83.6%
At least one national daily	30,550	60.4%	30,654	60.6%
At least one free daily	12,139	24.0%	13,960	27.6%
At least one regional weekly	21,395	42.3%	18,378	36.3%

[1] Definition of web user adopted for Survey ONE: person who has accessed internet over the last 30 days (at home, at work or elsewhere) and has an email address

[2] Self-completed questionnaire on a computer in the presence of an interviewer

AIR	EPIQ 2010 V3		TEST ONE 2010	
Total population (thousands)	*50,579*	*100%*	*50,579*	*100%*
At least one regional daily	15,666	31.0%	17,386	34.4%
At least one national daily	5,962	11.8%	6,137	12.1%
At least one free daily	3,231	6.4%	3,472	6.9%
At least one regional weekly	7,062	14.0%	7,460	14.7%

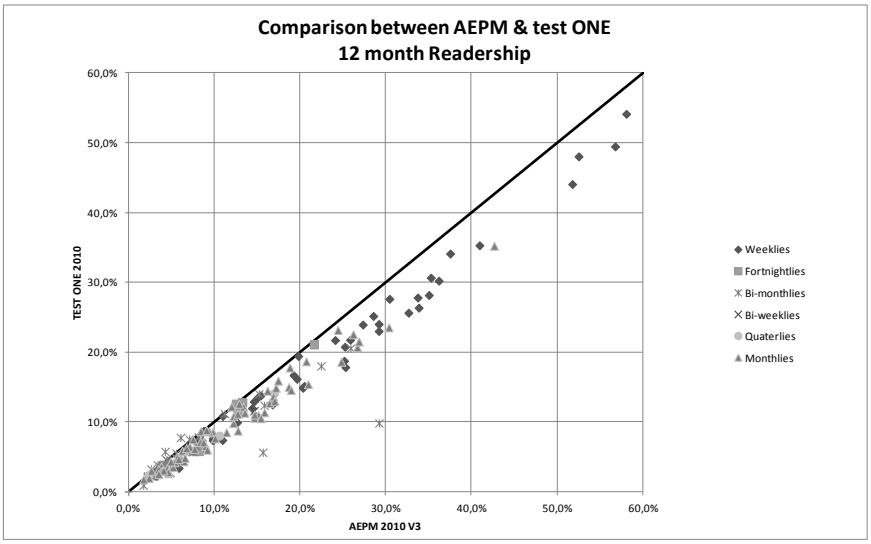
Regular readers	EPIQ 2010 V3		TEST ONE 2010	
Total population (thousands)	*50,579*	*100%*	*50,579*	*100%*
At least one regional daily	16,970	33.6%	17,452	34.5%
At least one national daily	7,163	14.2%	6,038	11.9%
At least one free daily	4,184	8.3%	4,096	8.1%
At least one regional weekly	9,400	18.6%	7,450	14.7%

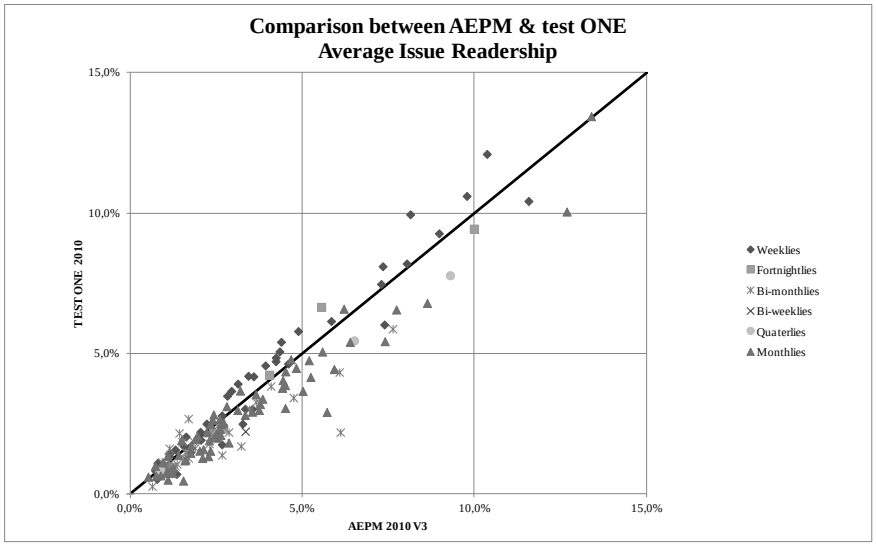
Occasional readers	EPIQ 2010 V3		TEST ONE 2010	
Total population (thousands)	*50,579*	*100%*	*50,579*	*100%*
At least one regional daily	22,451	44.4%	30,160	59.6%
At least one national daily	23,378	46.2%	26,879	53.1%
At least one free daily	7,978	15.8%	11,862	23.5%
At least one regional weekly	12,006	23.7%	13,156	26.0%

- The last 12 month readership is at the same level for the national dailies, with significant deviations, up or down, according to the title. The last 12 month readership is up for regional dailies (+ 6 percentage points) and free dailies (+ 4 percentage points). It is down for regional weeklies (- 4 percentage points).
- AIR results are stable for national dailies, the free press and regional weeklies. They are higher in the NRS ONE for regional dailies (+ 3 percentage points).
- All the daily press and regional weekly press aggregates show a higher occasional readership in the NRS ONE, whereas regular readership is lower for national dailies and regional weeklies, or at the same level for regional dailies and the free press.

b) Impact on magazine readership

For magazines, results have been compared on a title by title basis and grouped by publication frequency.





The above graphs show that the new NRS ONE methodology used in the first test negatively impacts on the last 12 month readership of a large number of magazines (99 significant negative deviations on a total of 162 magazines).

To summarize, the analysis of the results by publication frequency and press category leads to the following comments:

- The lower 12 month readership of magazines translates into a reduction in occasional readers for all categories.
- AIR deviations are not homogeneous, either by publication frequency or by category.
- The number of regular readers is stable for weekly and fortnightly press, down for the other publication frequencies.
- Ranking within categories is generally consistent. Ranking variations greater than +/-1 concern 40 magazines out of 162.
- Whatever the press category, the average number of titles read is higher within the population of web users in both tests ONE and AEPM.

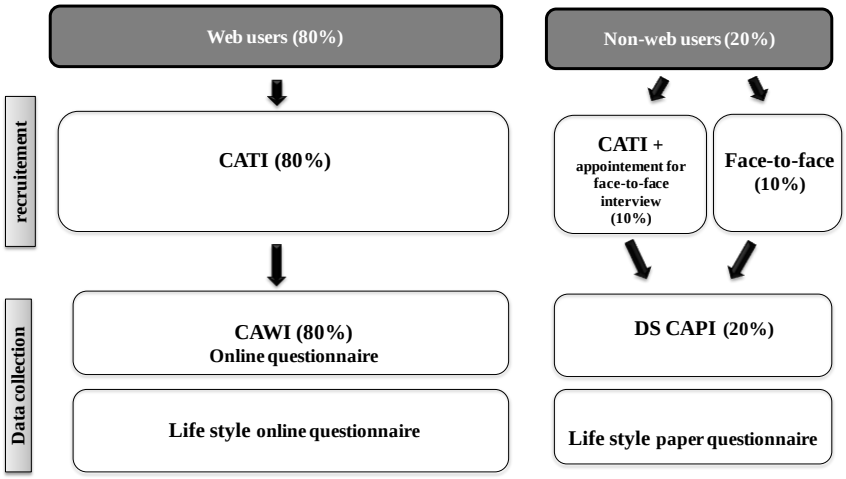
Following this first quantitative test, magazine editors asked AudiPresse to make changes to the initial NRS ONE methodology and launch a new test in order to evaluate the impact of these changes on readership figures.

As a result of the second test, the main changes in methodology were the following:

- The percentage of non-web users recruited and interviewed on a face-to-face basis was reduced from 20% to 10%,
- For non-web users, the CASI system was replaced by the double screen CAPI interview conducted by an interviewer,
- Explanatory transition screens were added to the filter questions in order to slow down the interviewee,
- Title logos were increased in size for improved legibility,
- Items for Recency Questions were simplified,
- The number of logos per screen was limited to 6.

Survey ONE methodology was finalized and permanently adopted by all AudiPresse stakeholders in December 2010. The survey was implemented in March 2011 as illustrated in the diagram below:

Diagram of the Survey ONE scheme in 2011



1.2 Press category rotation test

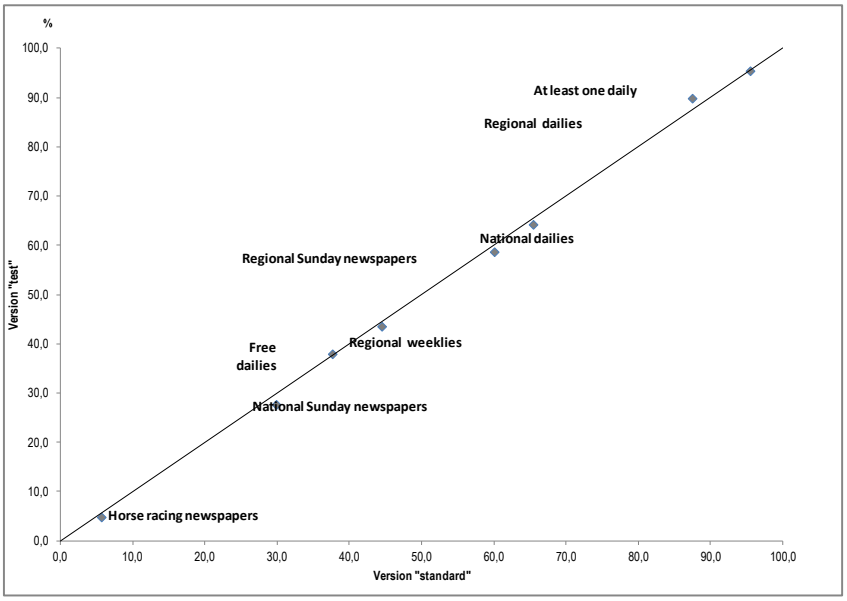
In response to a request from the magazines, AudiPresse decided to test the impact of rotating dailies and magazines in the NRS ONE questionnaire in October-November 2012.

This test was integrated into the NRS ONE 2012. During September and October, the sample was divided into two comparable sub-samples of 3,000 individuals, the first group being interviewed with the standard NRS ONE questionnaire, the second group with a test questionnaire where the order of presentation of press categories was inverted (magazines shown before the dailies, their weekly publication and regional weeklies).

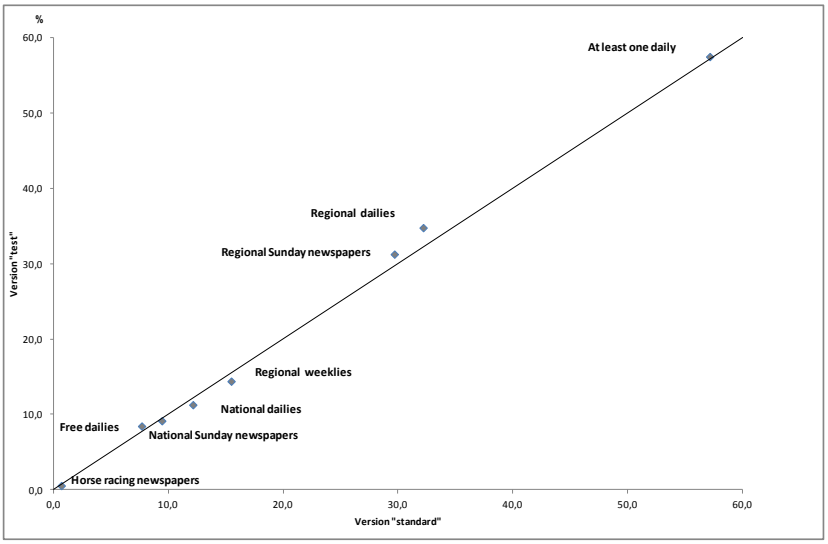
The methodology used in the two sub-samples was identical in terms of recruitment, interview mode, quota management and progression of the questionnaire.

Quotas were checked for each sub-sample every month. The socio-demographic structure of the two sub-samples was comparable and close to the theoretical structure for the main adjustment criteria. The interviewee profile on non-controlled criteria - such as the level of education or internet connection habits - was comparable in the two sub-samples.
The two sub-samples were compared on several indicators: rate of return of online questionnaires, drop-out rate, duration of each part of the questionnaire and of the whole interview, evaluation of the questionnaire by the interviewee, etc.
The analysis of these indicators shows no difference between the "standard" version and the "test" version. Rotation has therefore no impact on the way the questionnaire is filled in or on the interviewees' perception of it.

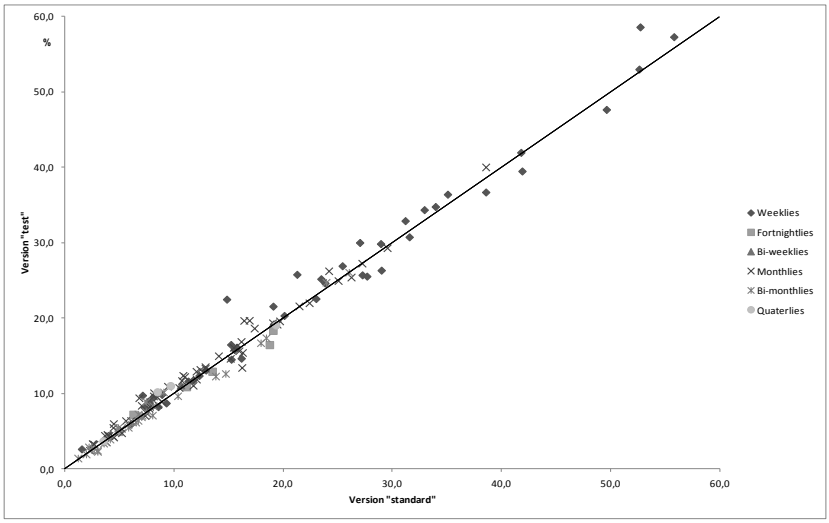
Daily press 12 month readership



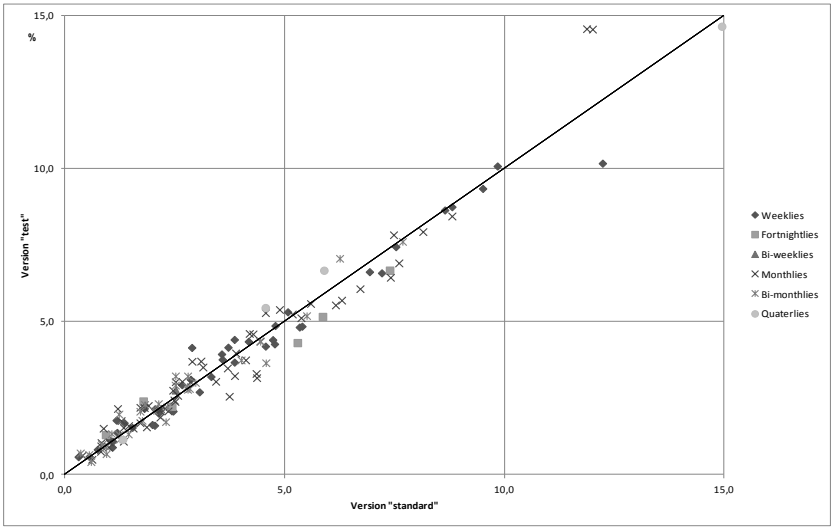
Daily press A.I.R.



Magazines 12 month readership



Magazines AIR



The comparative analysis of the results of the "standard" version against the "test" version shows that rotation of the dailies and magazines in the filter question:

- Has no overall consequence on daily press readership at individual title level, whatever the indicator. The "at least one regional daily press" aggregate is the only one to show a significant deviation in favour of the "test" version readership over the last 12 months.
- Has an upward impact on readership of a few magazines over the last 12 months when these are shown at the top of the list in the questionnaire (11 significant positive deviations out of the 147 magazines studied).
-

This upward impact is mainly apparent for magazine supplements of the daily press. When the logo (or the title) of the daily paper is presented next to the supplement, then the risk of confusing the two titles increases and has an impact on readership level of the supplement.

Rotating the order of titles also has an impact, although more moderate, on the magazine AIR indicator. The number of significant deviations between the two versions of the questionnaire is, in fact, similar to the results of the control sample of the survey carried out a year before where the sample had been randomly divided into two homogeneous sub-samples.

In conclusion, and taking these remarks into account, the CESP – organisation controlling readership surveys in France – has considered that:

- The current protocol of the NRS ONE questionnaire, within the framework of online self-completion where logos are shown, minimizes the impact of order of presentation and the confusion between titles.
- The test shows that rotating daily press and magazines in the filter question has little impact on readership of the various press categories, with the exception of magazine supplements of dailies.

II. Practical innovations put to the test

2.1 Recruitment phase

a. Importance of the interviewer's presence

The main consequence of the NRS ONE methodology is that, in general, interviewees are only in contact with the interviewer at the time of telephone recruitment. The success of the survey is therefore down to the interviewer: maximisation of acceptance rate, respect of quotas, rate of return, quality of the interviewee's concentration whilst completing the readership questionnaire.

This requires from the telephone interviewer:

- A good understanding of the overall survey process in order to offer the right methodology to the interviewee.
- A good knowledge of the purpose of the survey, its objectives and who commissioned it in order to convince the interviewees of the importance of their participation.
- Convincing arguments in case of refusal, hesitation or reticence, and ability to reassure the interviewee about the confidentiality of the survey, and to insist on how easy it is to complete.
- Training on instructions and how to fill in the first readership questions so that they are given to the interviewee even before his connection to the CAWI questionnaire.
- Ability to convince along with the accuracy required for any survey: the interviewer must convince his contact to fill in the questionnaire as soon as possible after the end of the telephone conversation.

This is why interviewers are briefed every year, not only on methodology changes but also on all the instructions they must follow. New interviewers attend workshops where, through role-play activities, they are confronted with real life situations in order to evaluate their understanding of instructions and improve their reporting abilities.

b. Sample design and sample frame for optimized representativity of the survey

Sample design:

First level:
- Stratification : district (95) x size of town (9)
- Determining the number of interviewees to be recruited by "département" and by size of town
- Random selection of telephone numbers in each of the 528 strata of the survey plan

Second level:
- Determining the population to be interviewed according to the quota method
- Monitoring of recruitment targets at national level for the overall sample (web users and non-web users)
- Sex x age (15-34 / 35-59 / 60 and above)
- Sex x employed/unemployed
- Day of the week (7)

Initially, the recruitment targets are managed on the basis of hypothetical response rates. During the process, targets are adjusted according to real response rates.

Sample frame:

In France, it is possible to directly identify three major types of access according to the telephone number. The first six digits of traditional landlines enable geolocation. Internet suppliers propose VoIP packages including internet and telephone; the numbers they allocate to their customers have specific prefixes. Finally, mobile phone suppliers also allocate numbers with specific prefixes. Telephone recruitment is therefore carried out from geolocalised numbers extracted from directories, VoIP numbers, exclusive or not, and mobile phone numbers.

- Traditional landline numbers :

A sampling frame is developed in line with the "département" x size of town matrix (9). The initial list of numbers is extracted from a file purchased from an outside supplier which includes numbers from the general telephone directory.

These numbers are immediately modified (by adding one to the last digit) and filtered through the reverse directory in order to remove numbers outside the survey field and create a useable sampling frame.

Such a procedure allows ex-directory landline numbers to be included in the sample.

- VoIP numbers :

These numbers are extracted from a file of localised numbers purchased from another supplier. The file is built up from the VoIP directories of the main operators. Numbers are randomly selected to respect the district x size of town matrix (9). Objective: 10% of the total number of respondents.

- Exclusive mobile phone numbers :

Mobile numbers are randomly generated and then compared to the exhaustive mobile phone list. Only eligible numbers are kept. This base includes all prefixes (first 4 digits) allocated to the different mobile telephone operators. Comparison is carried out on a base which is updated quarterly. Objective: 7% of the total number of respondents. Once the sample frame is thus defined, a very short questionnaire is used to determine whether people have a landline, in which case they will not be called on their mobile, or if they are "mobile only" users who could potentially be recruited.

c. Acceptance and return rates: a permanent search for optimisation

Acceptance and return rates are proof of the quality of the survey base and a direct result of the training and motivation of interviewers. The sample base guarantees a representative sample. In the NRS ONE, both elements are carefully monitored and annually optimized to produce good levels of acceptance and return rates. Moreover, focusing on the interviewers' training has resulted in an increase in both rates between 2011 and 2012.

Recruitment CAWI + CAPI	2011	2012
Number of calls	1, 302,119	1,008,066
of which useful contacts	243,082	167,253
Drop outs and refusals	194,181	121,024
Recruitments	48,901	46,229
Acceptance rate / useful contacts	20.1%	27.6%

In order to optimize the return rate of the readership questionnaire, a follow-up procedure has been implemented. It consists of a series of emails and telephone calls to people who have accepted to participate in the survey but have not yet filled in the readership questionnaire.

	2011		2012	
CAWI recruitments	43,357		41,000	
Return without follow-up	18,740	43.2%	19,655	47.9%
#1 email follow-up	3,265	7.5%	2,911	7.1%
#2 email follow-up	2,066	4.8%	2,154	5.3%
#3 phone follow-up	2,959	6.8%	2,064	5.0%
#4 email follow-up	787	1.8%	693	1.7%
#5 email follow-up	804	1.9%	645	1.6%
#6 phone follow-up	319	0.7%	264	0.6%
#7 phone follow-up	156	0.4%	83	0.2%
CAWI rate of return	29,096	67.1%	28,469	69.4%

Two conclusions can be drawn from the analysis of return rates according to level of follow-up:

- The natural return rate, before any follow-up, is linked to the interviewer's level of training. It increased by almost 5 percentage points between 2011 and 2012.
- Implementation of the follow-up procedure guarantees the highest possible return rate and therefore a more representative sample. Thus in 2012, the final return rate has increased from 48% to 69%, i.e. a 20 percentage point improvement. It also means that more than 30% of the sample responded thanks to one of the follow-up contacts.

2.2 Implementation phase

The interviewer's contact before the questionnaire implementation phase is however not sufficient to ensure the optimal quality of a survey. This is particularly true in the case of mainly self-completed surveys on internet. The weaker points of such surveys are well known: difficulty in controlling the structure of the sample, problem of sample distribution over time, delays between recruitment and completion of questionnaire.

The NRS ONE seeks to correct such problems. In particular, the monitoring of quotas with a day-to-day check aims to achieve a balanced sample of respondents to the readership questionnaire. This means differentiated sampling rates for each targeted population, depending on the forecasted return rate for each of them. For example, we know that young people tend to reply less well to surveys. Therefore, more young people will be proportionally recruited, in order to obtain a balanced sample.

This overall process of recruitment generates a sample perfectly in line with expected quotas, but also coherent in terms of non-controlled criteria during the recruitment stage, such as:

- Level of education of the respondent
- Type of housing
- Frequency of connection to the Internet
- Number of people in the household
- Household revenue

ONE Sample structure

Quota variables	2011	2012
Men		
Aged 15 to 24	6%	7%
Aged 25 to 34	8%	8%
Aged 35 to 49	14%	13%
Aged 50 to 64	12%	12%
Aged 65 and above	7%	8%
Women		
Aged 15 to 24	7%	7%
Aged 25 to 34	9%	9%
Aged 35 to 49	14%	13%
Aged 50 to 64	13%	13%
Aged 65 and above	9%	10%
Place of residence		
Village	31%	30%
Town < 20,000 inhab	19%	19%
Town 20,000 to 100,000 inhab	15%	15%
Town > 100,000 inhab	23%	24%
Paris	12%	13%

Non-controlled variables	2011	2012
Level of education		
Primary school	7%	7%
Secondary school	25%	26%
Sixth Form college	25%	25%
University	43%	43%
Type of housing		
House	68%	69%
Flat	30%	31%
Other	2%	0%

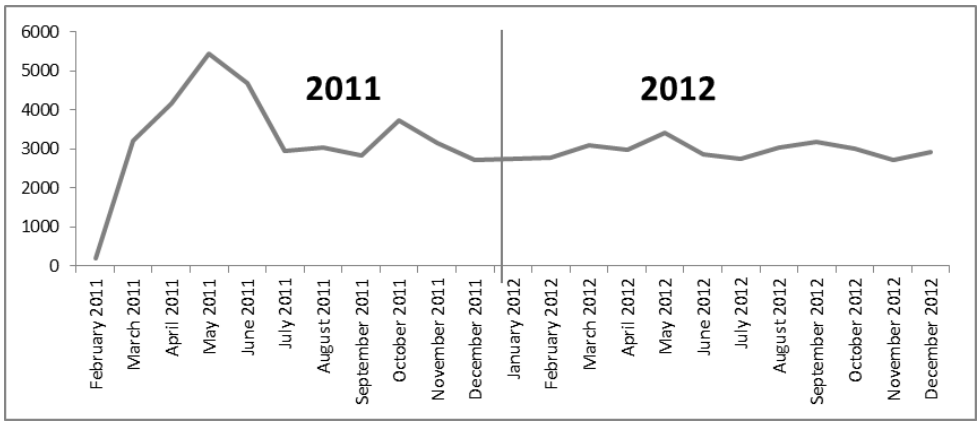
Internet connection habits		
Every day	61%	60%
Almost every day	14%	14%
Once or twice per week	7%	7%
1 to 3 times per month	2%	1%
Less often	2%	2%
Size of household		
1 person	20%	20%
2 persons	34%	34%
3 persons	18%	17%
4 persons	19%	19%
5 persons and above	10%	9%
Household revenue in euro		
Under 9,000	4%	4%
9,000 to < 12,000	5%	5%
12,000 to < 18,000	12%	11%
18,000 to < 24,000	14%	14%
24,000 to < 36,000	23%	24%
36,000 to < 45,000	14%	14%
45,000 to < 65,000	13%	13%
Over 65,000	6%	6%
Refusal / Not known	10%	9%

Such sample elements are under permanent monitoring by research companies, and also by AudiPresse who acts as project manager and monitors these variables on a weekly basis.

It was also decided to split the field equally between two companies, both of them being allocated strictly identical targets in terms of number of interviews and structure. Such splitting enables constant benchmarking and therefore additional control over the quality of work of both companies, whilst encouraging emulation between them, particularly in terms of acceptance and return rates.

This emphasis on recruitment generates an increasingly homogeneous distribution of questionnaires over time, even though they can be completed whenever the interviewee wishes:

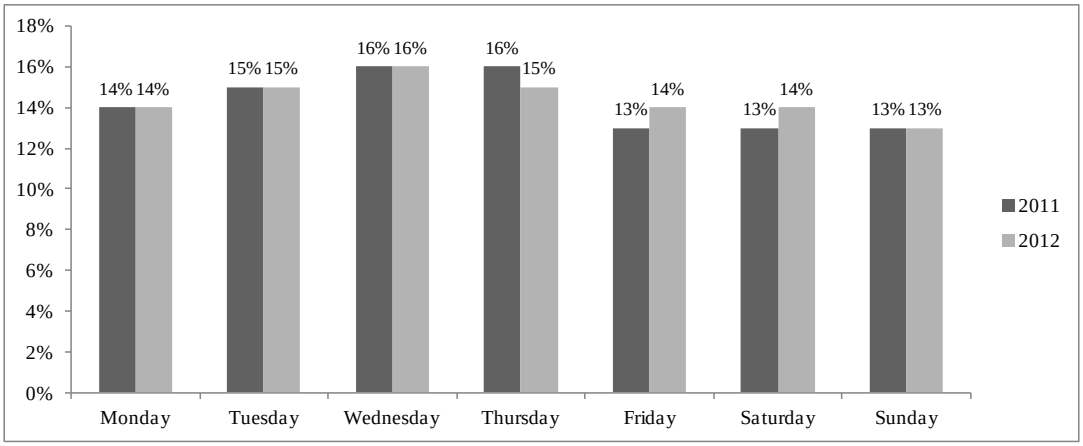
Number of questionnaires per month



The problem of distribution per day of the week remained. Telephone recruitment takes place from Monday to Saturday. The link to the questionnaire is sent as soon as each recruitment is validated. The questionnaire can therefore be filled in straightaway.

In order to avoid a shortage of interviews over the weekend and particularly on Sundays, we decided to suggest to part of the sample that they complete the questionnaire on Sunday. This enabled us to obtain an almost ideally distributed sample:

Distribution of questionnaires per weekday



2.3 Robustness of data collection

Paradoxically, within the strict guidelines and briefing of interviewees – as previously mentioned - the absence of an interviewer during the implementation phase has had a globally positive impact on results. Tiredness arising from having to complete the questionnaire in the interviewer's presence, and from the sustained rhythm he imposes, had an obvious impact on readership results which varied according to the position of the title in the survey. This effect of order of presentation has been highlighted in many papers worldwide, and was demonstrated again in the NRS ONE.

Impact of order of presentation of magazines on readership at filter level

At filter level, the impact of the order of magazines had already been measured in the survey about magazine readership in France conducted during the first half of 2005. This analysis showed differences ranging from 4 to 20 percentage points of readership index according to title publication frequency and indicator (filter or AIR).

During the first half of 2013, we carried out the same analysis again.

The survey involved 17,500 interviews. The totally random presentation at filter level perfectly balanced the probability for each title to be shown in any order, at the beginning, in the middle or at the end of the list. Readership of each title was measured over the four quartiles of the position at filter level. We can therefore refer to four complete readership groups, averaged by publication frequency and weighted according to the half year average.

All titles

Readership at filter level

	Face-to-face with interviewer	Self-completion via internet
1st quartile	104	101
2nd quartile	101	102
3rd quartile	99	100
4th quartile	96	98

AIR readership

	Face-to-face with interviewer	Self-completion via internet
1st quartile	105	103
2nd quartile	101	101
3rd quartile	98	98
4th quartile	96	99

Weeklies

Readership at filter level

	Face-to-face with interviewer	Self-completion via internet
1st quartile	102	100
2nd quartile	101	102
3rd quartile	100	100
4th quartile	98	98

AIR readership

	Face-to-face with interviewer	Self-completion via internet
1st quartile	108	101
2nd quartile	104	103
3rd quartile	95	98
4th quartile	95	98

Monthlies

Readership at filter level

	Face-to-face with interviewer	Self-completion via internet
1st quartile	104	102
2nd quartile	102	101
3rd quartile	100	99
4th quartile	95	98

Bimonthlies

Readership at filter level

	Face-to-face with interviewer	Self-completion via internet
1st quartile	110	102
2nd quartile	101	102
3rd quartile	98	100
4th quartile	91	96

AIR readership

	Face-to-face with interviewer	Self-completion via internet
1st quartile	103	103
2nd quartile	100	99
3rd quartile	101	97
4th quartile	97	101

AIR readership

	Face-to-face with interviewer	Self-completion via internet
1st quartile	112	107
2nd quartile	96	101
3rd quartile	98	98
4th quartile	93	94

We can see that the impact of order of presentation at filter level which, in a face-to-face situation, showed deviations of 10 to 20 percentage points, has now been confined to a range of 2 to 6 percentage points in a self-completion environment.

As far as AIR is concerned, deviations remain but at a lower level than in face-to-face situations (a maximum of 13 percentage points versus 19) and mainly affect bimonthly publications. It is worth noting that this particular press category includes a high number of titles about decoration with particularly irregular readers, naturally prone to forgetting as a result of weariness.

III. Readership put to the test

Comparison NRS ONE/AEPM-EPIQ

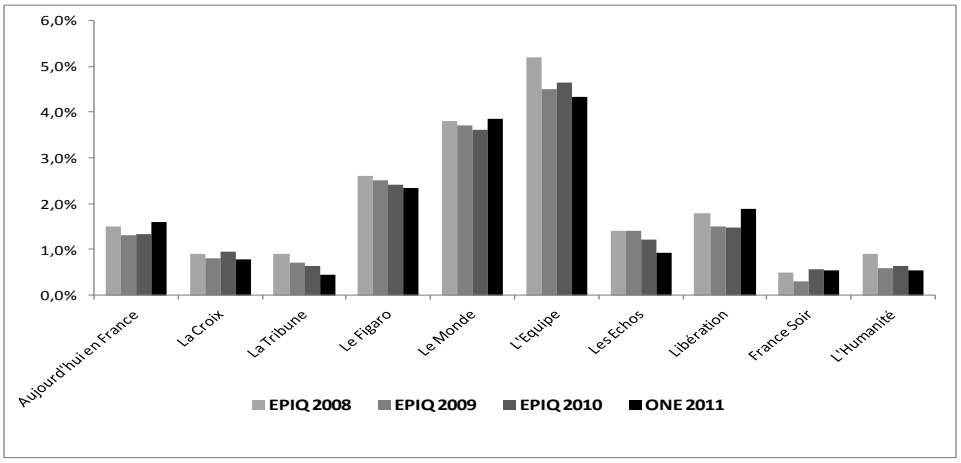
The first NRS ONE results were published in March 2012. At the time of publication, it was explained by AudiPresse and the CESP that no comparison could be made with previous years as many important changes to readership measurement had been introduced.

However, in order to carry out methodology analyses, the CESP compared the NRS ONE readership measurements with results from the EPIQ survey for dailies and the AEPM survey for magazines.

For dailies, these analyses were restricted to the national press given that the geographical boundaries had been modified for the regional press.

The graph below shows AIR changes for the ten national dailies between 2008 and 2011. This graph demonstrates that the new NRS ONE methodology has little impact on these titles.

Average Issue Readership - National dailies



As clearly shown in the first test carried out in 2010, the NRS ONE methodology has a strong impact on readership over the last 12 months.

There is a large number of significant deviations for last 12 month readership results between AEPM and the NRS ONE 2011, and most of these deviations are negative (101 negative deviations for 138 magazines in total).

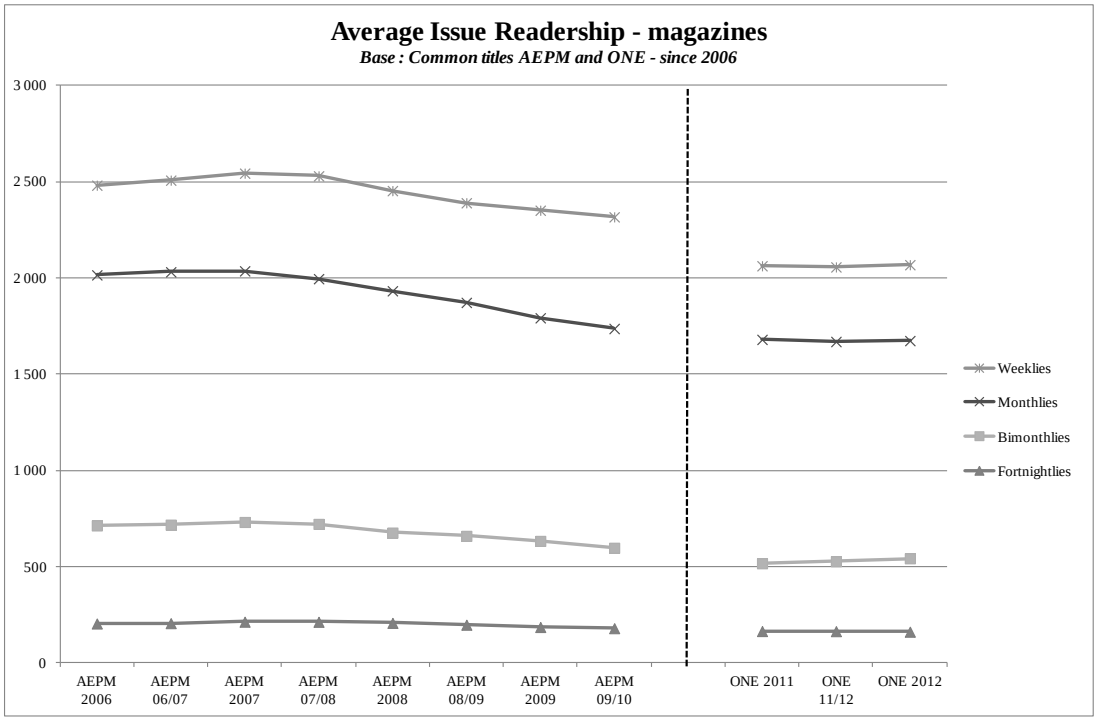
Comparison AEPM 2009-2010 / NRS ONE 2011
Number of significant deviations

		12 month readership results					
Magazines	Number of titles (138)	Average of relative deviation	minimum	maximum	Number of titles with significant deviation	Number of positive deviations	Number of negative deviations
Weeklies	43	-13%	-31%	44%	41	3	38
Monthlies	58	-14%	-39%	7%	46	2	44
Fortnightlies	6	-6%	-21%	26%	6	1	5
Bimonthlies	29	-5%	-37%	45%	19	5	14
Quaterlies	2	4%	0%	8%	1	1	0

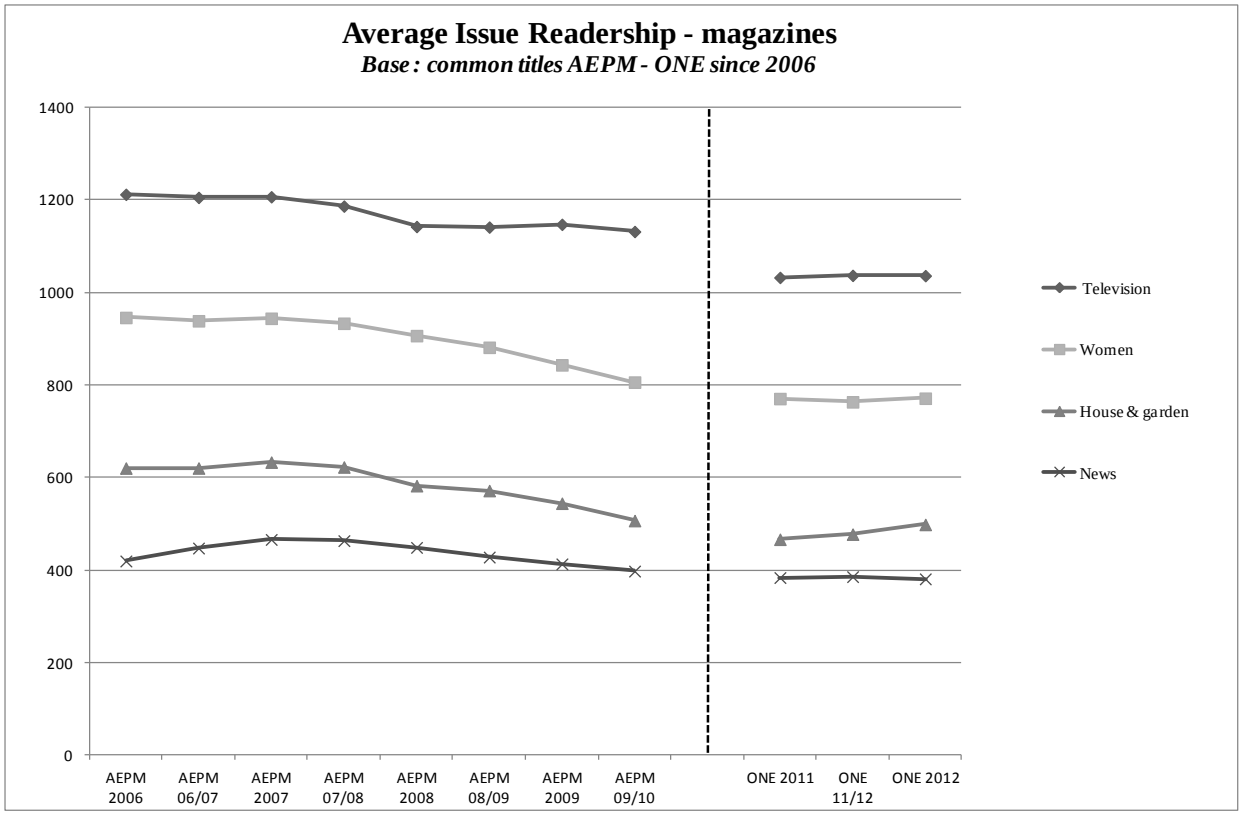
With regard to magazines, the impact of methodology change was analysed for the 115 common magazines between 2006 and 2012. Trends were studied according to publication frequency, press category and for each title.

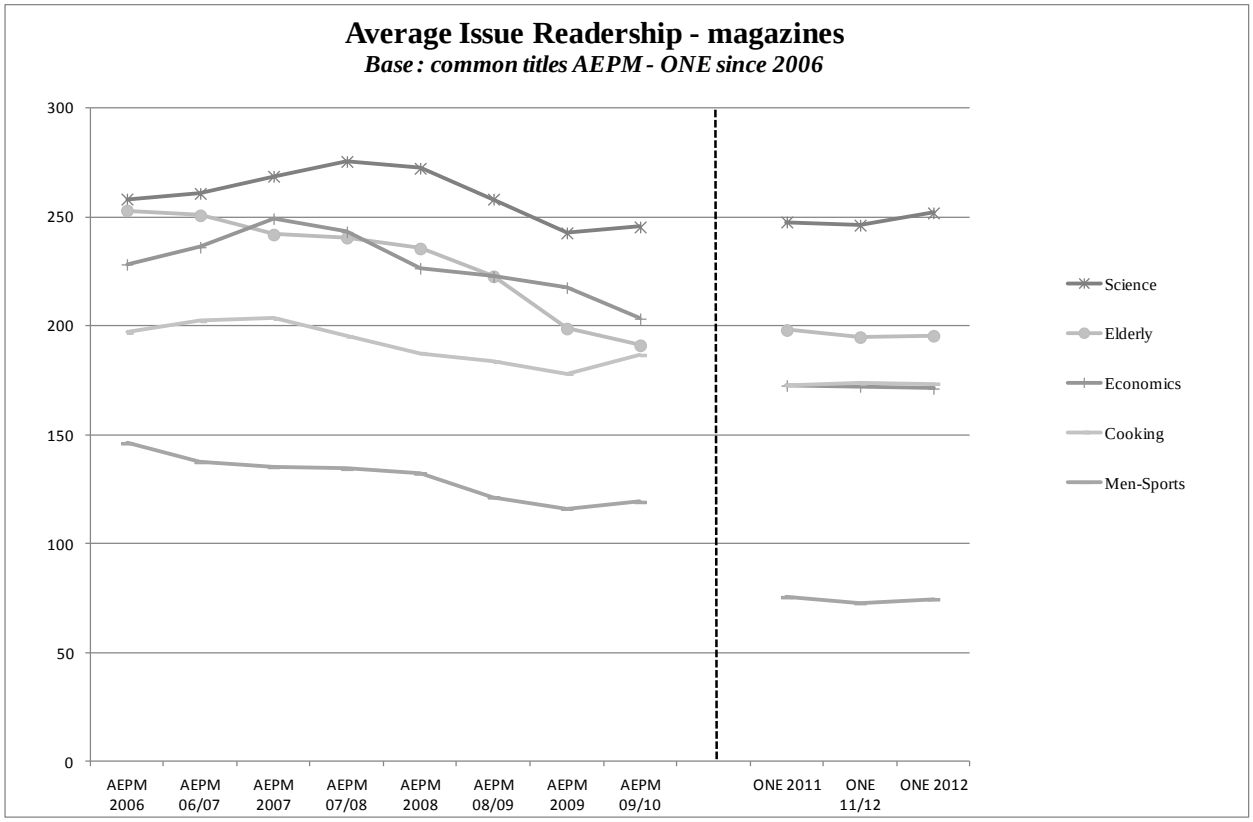
As far as AIR is concerned, NRS ONE results were compared to readership data since 2006 (when the latest important methodology change was implemented in the AEPM survey).

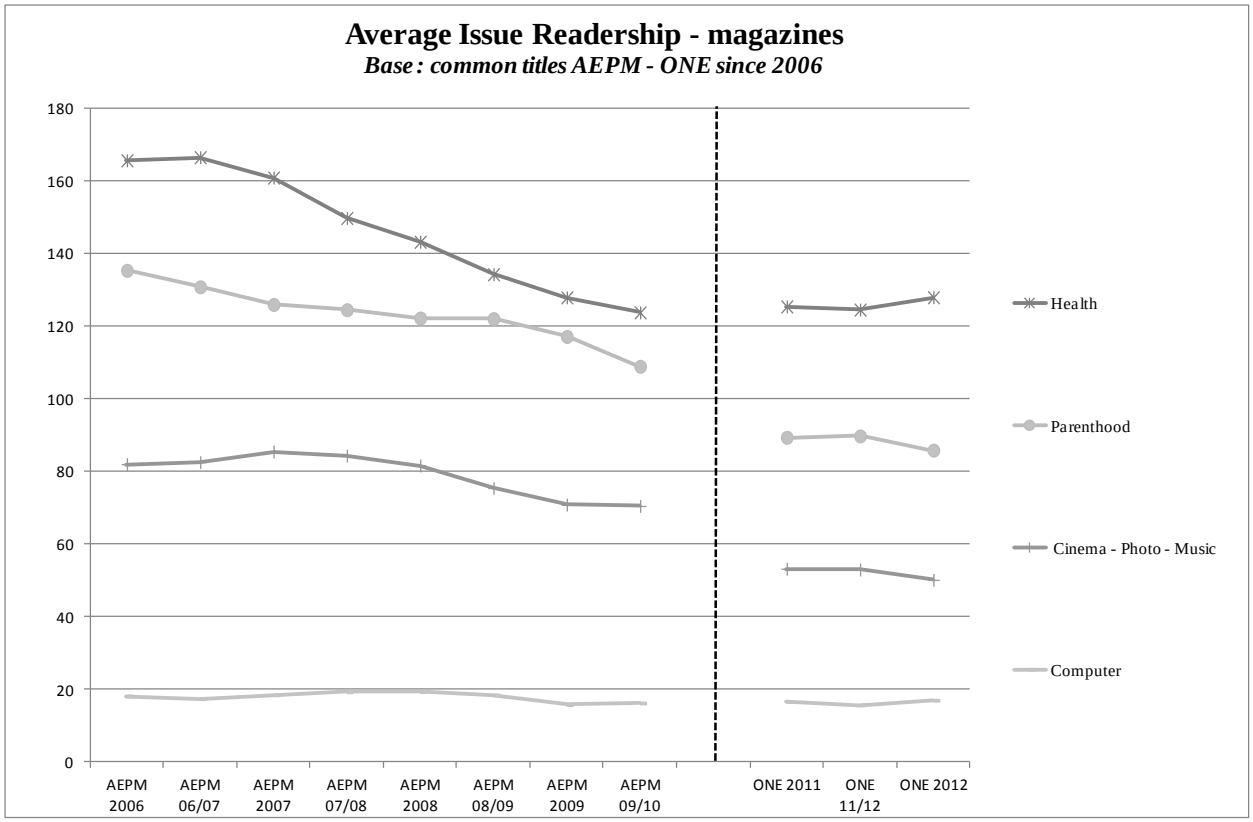
Globally, for all common magazines, AIR readership in the NRS ONE is lower than in the AEPM survey. It has stabilised over the three NRS ONE publications. The reduction is more marked for weeklies than for other publication frequencies (see graph below).

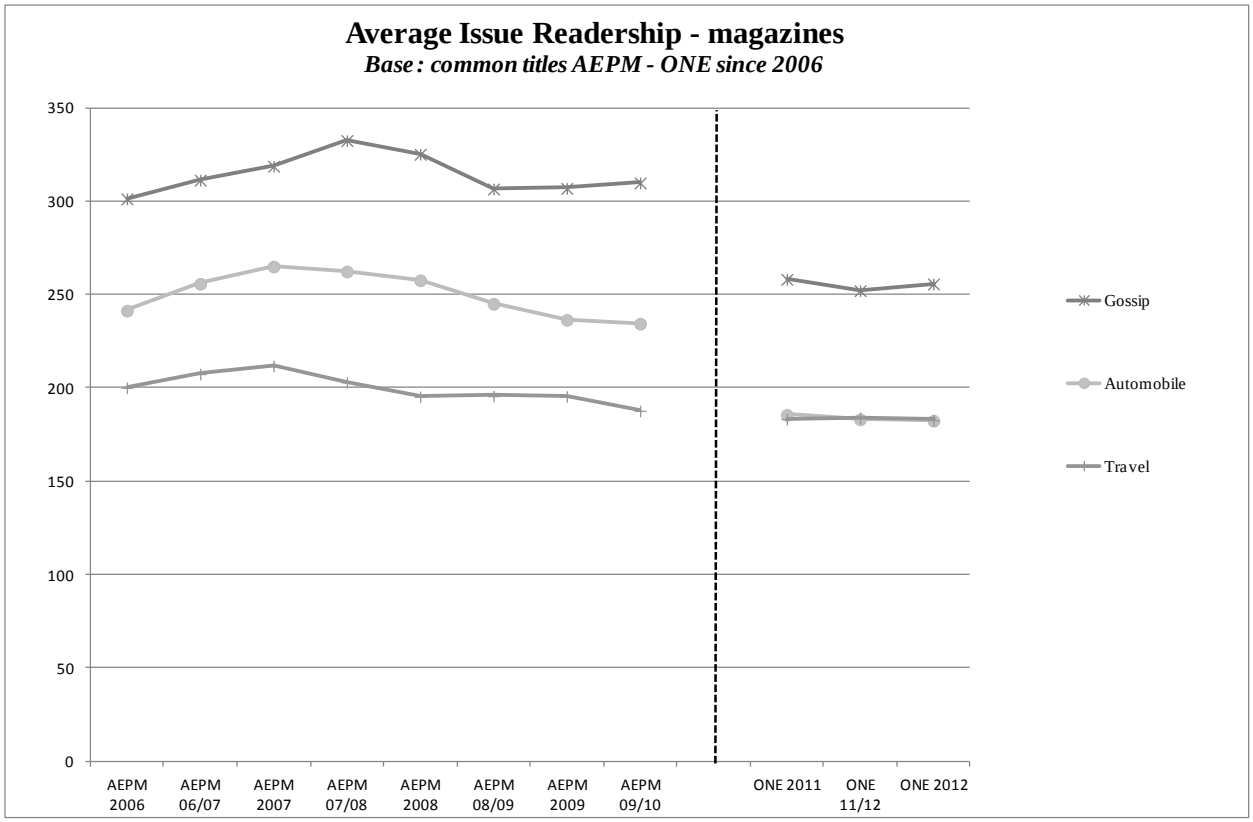


When you start considering the readership results by theme, deviations between Survey ONE and AEPM vary according to press category. The impact of methodology changes on readership was more important for six categories: parenthood / cinema-photo-music / economics and capital assets / mens-sports / automobile / gossip.






Average Issue Readership - magazines
Base : common titles AEPM - ONE since 2006
180
160
140
120
100
80
60
40
20
0
AEPM 2006
AEPM 06/07
AEPM 2007
AEPM 07/08
AEPM 2008
AEPM 08/09
AEPM 2009
AEPM 09/10
ONE 2011
ONE 11/12
ONE 2012
Health
Parenthood
Cinema - Photo - Music
Computer


Average Issue Readership - magazines
Base : common titles AEPM - ONE since 2006
350
300
250
200
150
100
50
0
AEPM 2006
AEPM 06/07
AEPM 2007
AEPM 07/08
AEPM 2008
AEPM 08/09
AEPM 2009
AEPM 09/10
ONE 2011
ONE 11/12
ONE 2012
Gossip
Automobile
Travel

IV. Readership measurement in a digital world

From the start of the NRS ONE, digital readership issues have been taken into account. The survey includes a full section dedicated to digital readership located after title readership questions.

The survey had two main objectives:

- measuring digital readership of print titles as a single source in order to evaluate their overall readership level,

- creating indicators which could be used as hooks with the aim of merging print readership and digital readership establishment surveys (fixed and mobile Internet).

4.1 The scope of the survey

The questionnaire used (see PDRF 2011 paper for details) allows identification and measurement of all digital press versions. In order to ensure that the interviewee understands the question and clearly identifies the various digital versions, the questionnaire starts with an explanation page describing the various digital versions being considered. These include traditional and mobile Internet, use of computers as well as mobile phones and tablets:

- Internet access via a computer
- Internet access via a mobile phone
- Internet access via a touchscreen tablet
- Apps downloaded onto a mobile phone
- Apps downloaded onto a touchscreen tablet
- PDF version of a paper title downloaded onto a computer, a mobile phone or a touchscreen tablet

The aim of the questions is to record every type of digital reading for each relevant press title.

The questionnaire is of course filtered according to the digital versions that exist for each press title so that the interviewee only has relevant choices.

In the same way, titles retained for digital readership measurement must have a minimum of 100,000 unique visitors in at least one of the fixe or mobile Internet establishment survey. This prevents us from surveying confidential titles for which we could not, in any case, publish results.

4.2 Collecting data / building-up indicators

When we initiated the survey, and in order to avoid comparison with established digital surveys, we limited our indicators to « consultation in the last twelve months» and « regular reading ». We also considered that these questions were simpler for interviewees.

Since July 2012, we have added a question about "recency" for each digital version of a media brand. Although this makes the questionnaire slightly longer, the additional information has not however affected the dropout rate of respondents, thereby proving that the question was not only valid but also easy to answer.

All these data enable us to provide publishers with combined indicators which highlight the increasing importance of digital press for the advertising market. The objective is to create valid and relevant indicators.
For each media brand, we therefore decided to distinguish the following categories:

- Traditional website
- Combined fixed and mobile websites
- Combined mobile and tablet apps
- Combined mobile and tablet versions
- Overall combination of all digital versions for each brand

Finally, we also publish a brand indicator which combines all print and digital readership measurements.

4.3 Digital readership measurements and trends

NRS ONE, thanks to its accuracy in terms of digital data (equipment and use) and the size of its sample, can now be considered as an "establishment survey".
The use of mobile devices is growing fast: enthusiasm for these devices, including online press reading, shows no sign of slowing down. More than 40% of the French adult population own a smartphone (20.5 million people), a 25% increase in one year.

The growth in ownership of digital tablets is huge; it increased 2.5 times in one year to reach now 16.8% of the French population, i.e. 8.6 million people.
Digital reading is following the same trend as device ownership. If, overall, digital reading increased by 21% between 2011 and 2012, the most dynamic growth can be found in mobile phones and tablets (+62% year on year).

Growth of print readership between 2011 and 2012

	Total press	Dailies	Magazines
Brand	+3.9%	+5.2%	+2.8%
Print	+0.7%	+1.8%	-0.3%
Total Digital	+20.8%	+22.7%	+18.4%
Web	+12,8%	+14.7%	+10.4%
Mobile & Tablet	+62.4%	+64.1%	+60.0%

Nowadays, "Mobile & Tablet" reading represents 29% of all digital reading. Apps continue to represent 50% of all mobile reading results.

Breakdown of different modes of digital reading

	2011	2012
Total Digital	100%	100%
Web	78%	71%
Mobile & Tablet	22%	29%
of which Apps	11%	14%

42% of the French population, i.e. 21.5 million people, read at least one digital press title at least once a month, be it via internet sites, mobile sites, mobile or tablet Apps or a downloaded PDF version whatever the device.

The increase in digital reading is in synergy with traditional press reading: a high proportion of individuals who read the digital version of a press title, also read its paper version.

Average breakdown by media brand of Print/Digital duplication by digital readers

	2011	2012
Total Press	41%	38%
Dailies	56%	53%
Magazines	37%	33%

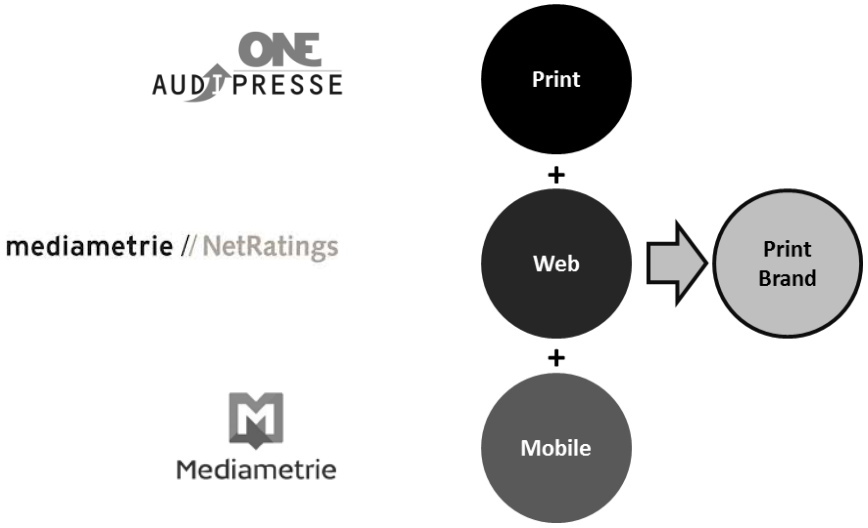
We call this new behaviour Multireading©, as opposed to multitasking used for digital and audiovisual media. Multireading© analyses the new reading breakdown between various formats, including paper.

4.4 Towards a print/digital fusion

The latest innovation concerning the French media brand readership survey will involve merging all three establishment surveys (print, fixed and mobile internet).

The objectives of such a fusion are:

- to measure overall readership of media brands in line with official print, fixed and mobile internet readership measurements, adapted to a potential evolution of digital device measurement parameters, including tablet readership in the future,
- to create a unique standard for all users with a robust and controlled methodology justifying its recognition in the market,
- to provide communication tools to publishers and evaluate the efficiency of print+digital actions in mediaplanning.



Tests are being carried out in order to validate the overall methodological approach, to select the most efficient merging tools, and to evaluate the quality of the results.

In particular, we expect to obtain information on:

- the scope of the different surveys, which has already led us to harmonize questionnaires for mobile internet users and to analyse the scope for merger (content of digital media brands in the various surveys)
- the choice of merging techniques: stratification, fusion distance calculation, matching and weighting

The project was launched more than a year ago, but has been slowed down for two reasons:

- Difficulty in integrating mobile internet data
- Problem in defining the scope of digital brands in order to validate the merger of print and digital versions

The next stage will be to integrate tablet readership measurements when such data become available from Médiamétrie.

Conclusion

Launched two years ago, the new NRS has proven its worth in France. For a reduced overall cost, it has produced higher levels of robust information. It reduces the variation in results and the impact of order. It enables changes in French reading habits to be taken into consideration by addressing all contact points between readers and media brands. The multimodal approach has enabled us to benefit from data collection on internet without suffering from its drawbacks.

At the same time, the NRS ONE is always evolving. Built on a modular principle, it is designed to adapt to its environment - for example the percentage of interviewed web users. We are already working on adapting the questionnaire to touchscreen tablets. We know that we will eventually have to re-think our method of collecting data in order to consolidate return rates and cope with the increasing unpredictability of respondents.

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