PRINT PLUS: MEASURING DIGITAL PRINT PLATFORMS

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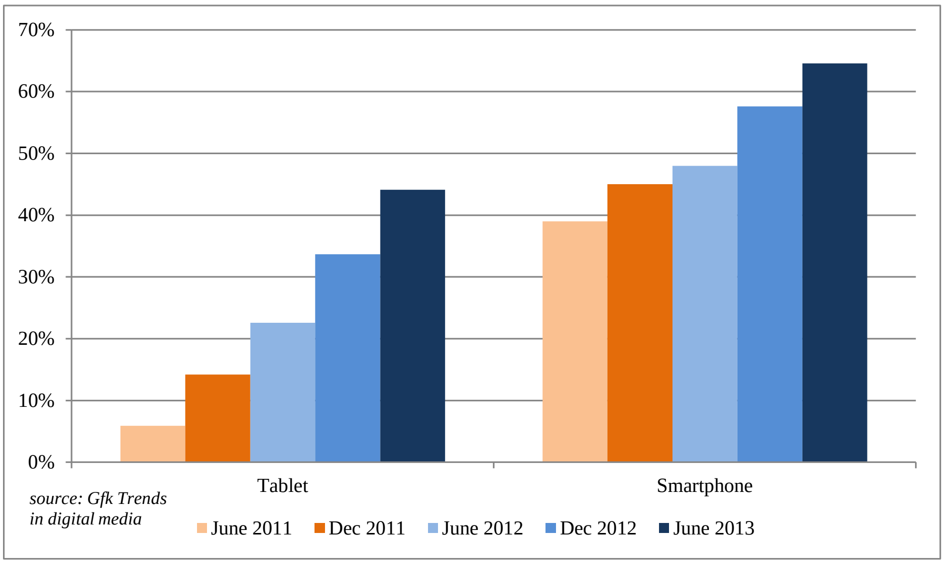
1. Reading on digital platforms: why now and what to measure?

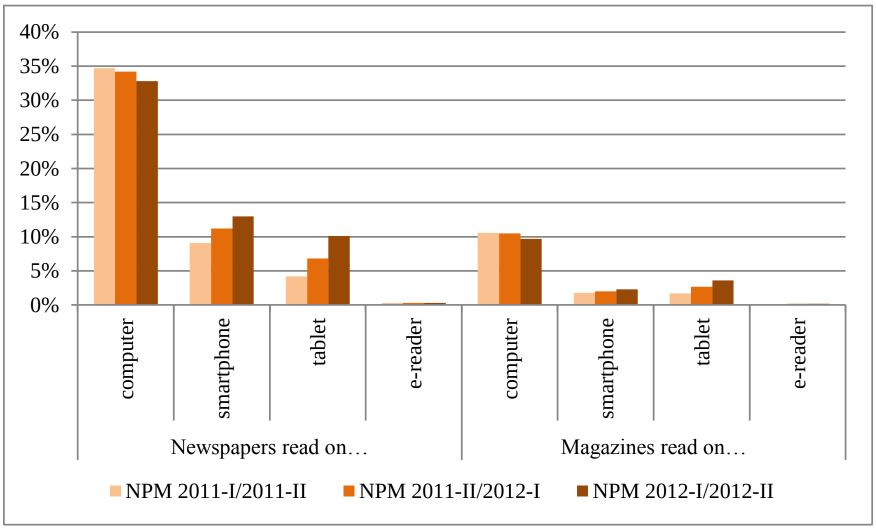
In July 2010 the iPad was introduced in the Netherlands. Since then, the number of users of tablets has increased with a million or more every six months. By June 2013, 40% of the population used a tablet and more than half of the population owned a smartphone (Figure 1, GfK Trends in digital media). This widespread availability of mobile devices has had a great impact on the Dutch media landscape. Publishers, especially newspapers, have developed a multitude of digital platforms.

Figure 1. Tablet and smartphone penetration among the Dutch internet population



Since 2011, reading on digital platforms has been included in the Dutch Readership Survey for newspapers and magazines in general (on an aggregated level, see Figure 2). In 2012, it was decided to conduct a test for measuring digital publications per title. Inspired by the presentation of the French national readership survey ONE at the PDRF in San Francisco (Saint-Joanis/Cour, PDRF 2011), a pilot was carried out to investigate the options to add digital readership for titles which are measured in the Dutch readership survey. For the design of the pilot we have also looked at some other surveys that attempt to measure digital platforms, like the Belgian national readership survey .

Figure 2. Readership on digital platforms



2. Pilot survey design

In the pilot, the digital platforms of ten titles were measured. A questionnaire was compiled and tested in a qualitative pre-test in November 2012. Based on the findings of the qualitative pilot, questions were added in the readership questionnaire, in a section after the measurement of printed editions so that they did not interfere with the currency (which is based on the printed editions). Data were collected from a sample of the Dutch National Readership Survey from January till June 2013, n =10.000 respondents.

One of the things that had to be decided upon was which digital formats and devices had to be included in the questionnaire. A second issue was how to design a questionnaire in such a way that the respondent understands what we ask, as there is a big diversity of devices and formats in the market.

On the basis of experiences in different countries and a review amongst the Dutch publishers, we decided to measure the following digital formats and devices:

- Digital formats of a brand: website / digital copy / app
- Digital devices: computer / smartphone / tablet / e-reader

Although the reach of websites on computers is measured in the national internet audience survey (STIR) we have decided to include computer and website in the questionnaire; as this is still the biggest part of reading on digital devices (see Figure 2) it would be confusing for the respondents if they were excluded from the list. However we do not intend to use these figures in the market in order not to interfere with the currency data for internet audience.

The following paragraphs will deal with the questionnaire issues and the findings from the qualitative pretest. Furthermore, the results of the quantitative pilot will be presented. Conclusions will be drawn about the options to measure digital platforms of all 180 titles in the Dutch readership survey.

3. Designing the questionnaire

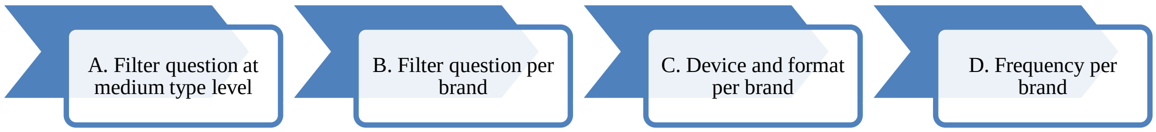
Before questions about reading on digital platforms were added to the national readership survey a qualitative pretest was done. The objective of the pretest was to test if the questions were clear for respondents and whether under-/overclaim of reading digitally could be avoided.

The national readership survey uses an online CASI questionnaire, which takes half an hour on average to fill in. The questionnaire starts with questions about the printed newspapers and magazines. Each respondents answers questions on approximately 150 titles plus additional questions on other media and socio demographics. The print part of the questionnaire takes 15 minutes on average to fill in.

Because the measurement of digital platforms was to be a test, impact on the currency – the standard questions about reading printed editions – was to be avoided. The new questions were therefore placed in the second part of the questionnaire. This second part of the questionnaire already contains questions on reading print on digital platforms, for newspapers in general and for magazines in general. The brand digital questions were added to this section of the questionnaire, as a follow up of the general questions, which were used as a filter.

Figure 3 shows an outline of the questions in the digital section. The first set of questions deals with the devices people use to read newspapers and magazines in general: computer, mobile phone, tablet, e-reader. Which of these devices do they use and how often? People who use any of these devices to read either newspapers or magazines are then routed to the new questions about digital reading of brands.

Figure 3. Outline digital section



To start with, people are asked what brand they have been in contact with digitally in the past 12 months. For those brands it is established what format they have read on which device and finally, what the frequency of reading the format per device is.

These questions were designed taking into consideration the learnings shared by the presentations given on this subject during the PDRF 2011 in San Francisco, especially the French presentation.

In November 2012, a pretest of the questionnaire was carried out. 17 single interviews were conducted with respondents who had the opportunity to come into contact with print on digital platforms, i.e. they use the internet at least once a week. We selected respondents from 4 age groups (age 13-19, 20-39, 40-64 and 65 years and above), in each age group we interviewed women and men as well as people with a low level vs. a high level of education. Half of the respondents owned a smartphone and/or tablet, to insure we would interview people who used various digital platforms.

Respondents were invited to the office of GfK Intomart. In the waiting area, they were handed a laptop to fill in the first part of the questionnaire, about the printed editions of the 150 titles. After that, they were asked to fill in the digital section of the questionnaire in the presence of the interviewer, thinking aloud while they filled in the questionnaire. If necessary, the interviewer asked for clarification about the comments of the respondents. After the digital section was completed, the questionnaire was stopped and the interviewer asked some additional questions.

Based on the findings from the pretest, the questionnaire was adapted to the set up described hereafter.

A. Filter question at medium type level

The filter question at medium level has been added to the readership survey in 2011. For newspapers and for magazines, respondents are asked about which device they use to read newspapers and which to read magazines, 'paper' being one of the options. If respondents indicate they use a computer, smartphone etc., there is a follow up frequency question per device.

Originally, there was only a verbal introduction to the questions. When adding the brand measurement, this introduction was enhanced with visuals of the different devices and platforms. Figure 4 shows the introduction. The pretest findings showed that respondents used the visuals for a quick check to make certain they (thought they) understood the questions and only turned to the text in case anything wasn't clear. In the pretest, only the devices were shown, because the filter questions at medium type level only deal with devices, not platforms. The pretest showed that many respondents did not consider apps when answering the questions, resulting in underclaim. Therefore the visuals of the platforms were moved to the introductory screen.

Figure 4. Introduction filter question medium type level

A serendipitous finding in the pretest was that the Dutch word 'dagblad' (= daily newspaper) was not clear. 'Dagblad' is a somewhat formal word, in everyday life a newspaper is referred to as 'krant' (=paper). While older respondents had no problem with 'dagblad', people younger than 30 years were unsure what kinds of publications we meant. This was especially the case for respondents who use digital platforms more often. An explanation for this is that while on paper, there is a clear distinction between the look and feel of a magazine and a newspaper, the appearances on screen are much more similar. Therefore, the word 'krant' was added in the question about newspapers and the word 'magazines' in the question about magazines.

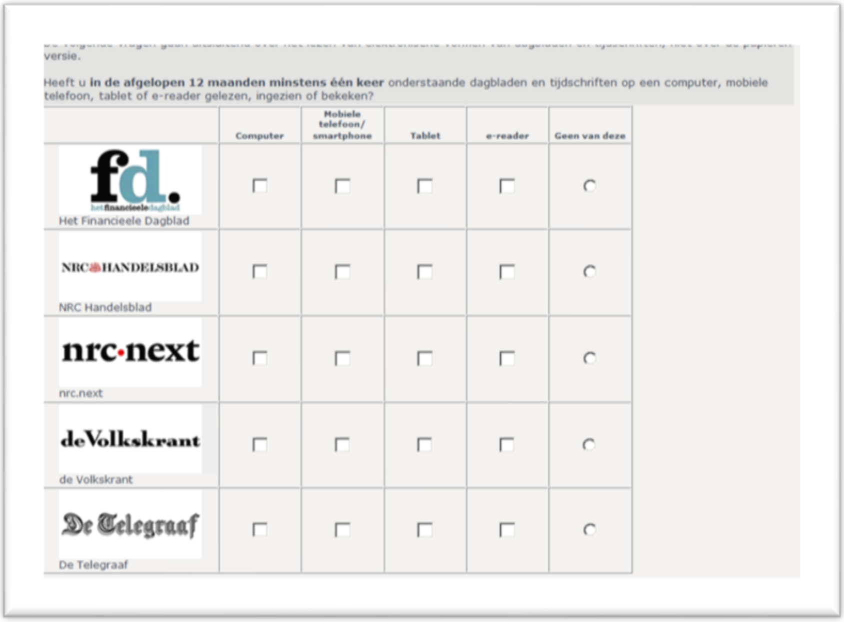
B. Filter questions per brand

Respondents who identified themselves as digital readers proceed to the filter question on the brand level. All brands – 5 newspapers and 5 magazines – are shown to respondents if they have identified themselves to be readers of either newspapers or magazines. Respondents were probed to make sure screen ins and screen outs via the medium type filter were correct. All respondents classified themselves correctly.

During the pretest the brand filter question was designed in the same way as the filter question for the printed versions: per title, a respondent must answer ‘yes’ or ‘no’ to the questions whether the title has been looked at in the past 12 months, preceded by a short introduction that the next questions were about reading on electronic devices. However, because respondents had just answered the questions about newspapers and magazines in general, where ‘on paper’ was one of the options, many brands were selected incorrectly, because respondents assumed that we again were talking about the paper version as well.

It was therefore decided to change the possible answers from ‘yes’/’no’ to the various electronic devices. Figure 5 shows this final version of the brand filter question, with the brands represented by their logo and the devices – computer, mobile phone, tablet, e-reader, none of these – in the columns.

Figure 5. Filter questions per brand


versie.

Heeft u **in de afgelopen 12 maanden minstens één keer** onderstaande dagbladen en tijdschriften op een computer, mobiele telefoon, tablet of e-reader gelezen, ingezien of bekeken?

	Computer	Mobiele telefoon/ smartphone	Tablet	e-reader	Geen van deze
Het Financieele Dagblad					
NRC Handelsblad					
nrc.next					
de Volkskrant					
De Telegraaf					

C. Device and format per brand

For those brands looked at with an electronic device, we want to establish the platform that has been consulted: did a reader look at the digital copy/e-paper or did he go to the app or to the website? This is a difficult question, because there are many hybrid possibilities. The main focus for publishers is on the digital copy and this can be accessed through e-mail, via an app or on the website. We wanted to measure the digital copy regardless of the manner of access. To this end, we invested a lot of time to formulate and lay-out a detailed instruction how to choose the correct format. Which during the pretest was consistently ignored by the respondents.

When questioned about their choice of format, respondents answered that they could remember using the app, but were unsure whether that was a standalone app, directed them to the website or to the digital copy. Especially respondents how use various electronic devices for their media consumption and/or consult many publications have difficulties to differentiate. It is likely that it will become increasingly difficult for respondents to answer questions on devices and formats as more people own more devices and the penetration of digital publication rises.

Nevertheless, the question about the format per platform was kept in the questionnaire, by lack of a better alternative.

D. Frequency per brand

Finally, for each format per device the frequency of reading is established. Comparable to the papers versions, this can be difficult for infrequent readers. Based on the pretest we chose a less detailed scale for the definitive question.

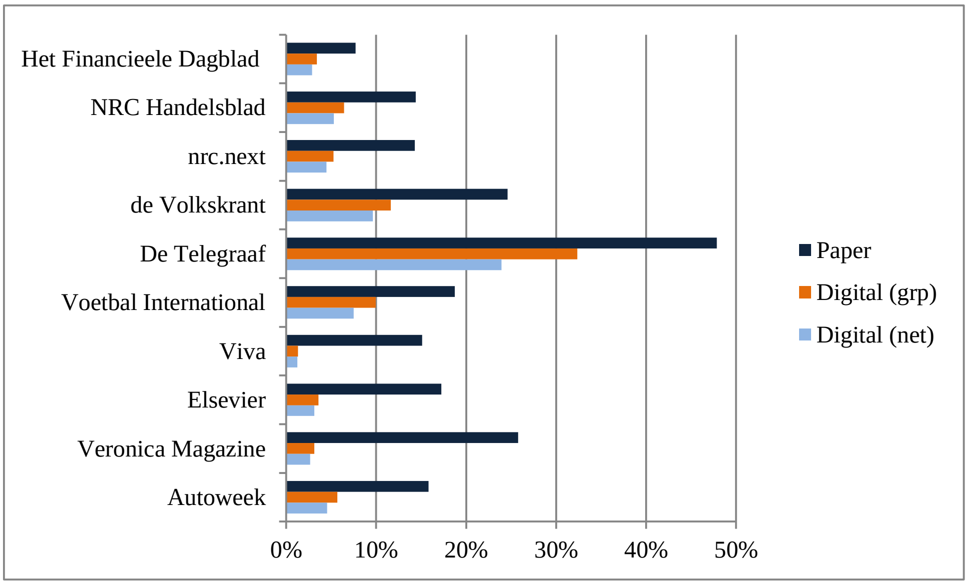
4. Test measurement within the national readership survey

The new questions included in the standard questionnaire of the national readership survey in 2013. A sample of n=10,536 respondents filled in the questionnaire from January through June. All respondents answered the filter questions at medium type level; 57% of the sample identified themselves as readers of some digital platform and were therefore routed to the digital brand questions. The new questions about the ten brands added half a minute to the questionnaire length for the whole sample, for respondents who were routed to the new questions, the questionnaire length increased by a minute.

The ten brands were selected because they were deemed to have a relative large digital audience. The readership levels of the paper version of these brands is also above average.

Figure 6 shows a comparison between the total audiences (read in the past 12 months) for the paper version and the digital versions per brand. For all brands, the audience of the paper version is still much larger than that of digital version. The pattern shown at the medium type level (see Figure 2) is the same on the brand level: newspapers have gained a larger digital audience than magazine. On average for the 5 newspaper brands, the number of digital readers is almost half of the number of readers of the paper version, while for magazines this is approximately a quarter. The differences between magazine brands are larger than between newspapers. Especially De Telegraaf (the largest newspaper in the Netherlands) and Voetbal International (a soccer magazine that also has connections to a radio station and a tv programme) manage to get their readers to go and take a look at their digital versions.

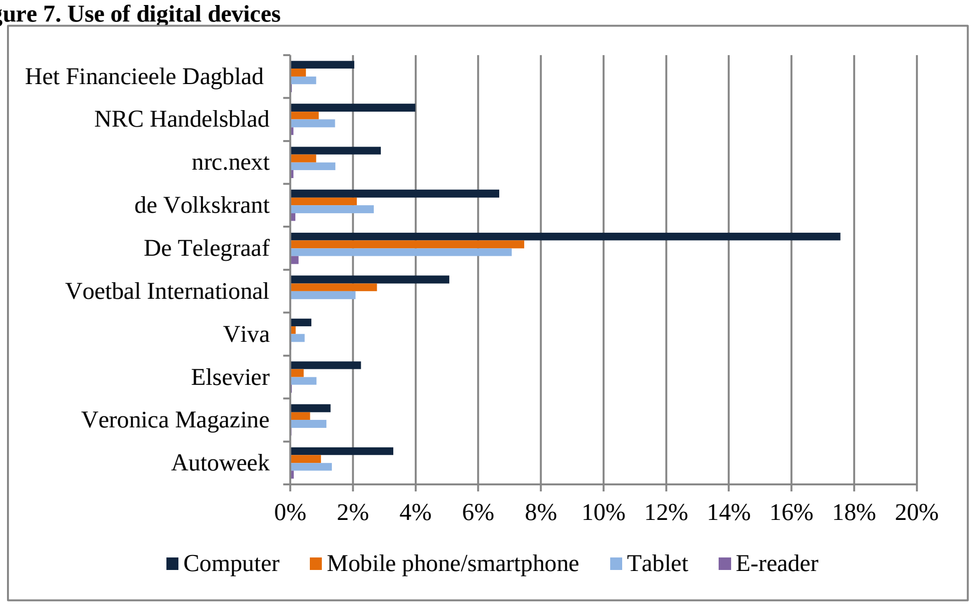
Figure 6. Total audience (read in past 12 months) of paper vs. digital version



For most publications, the net digital audience is slightly lower than the sum of all different sorts of digital platforms. This means that once people start using the digital platforms of a brand, they do not only use one, but several. This might be an opportunity for publishers: ‘if you build it, they will come’.

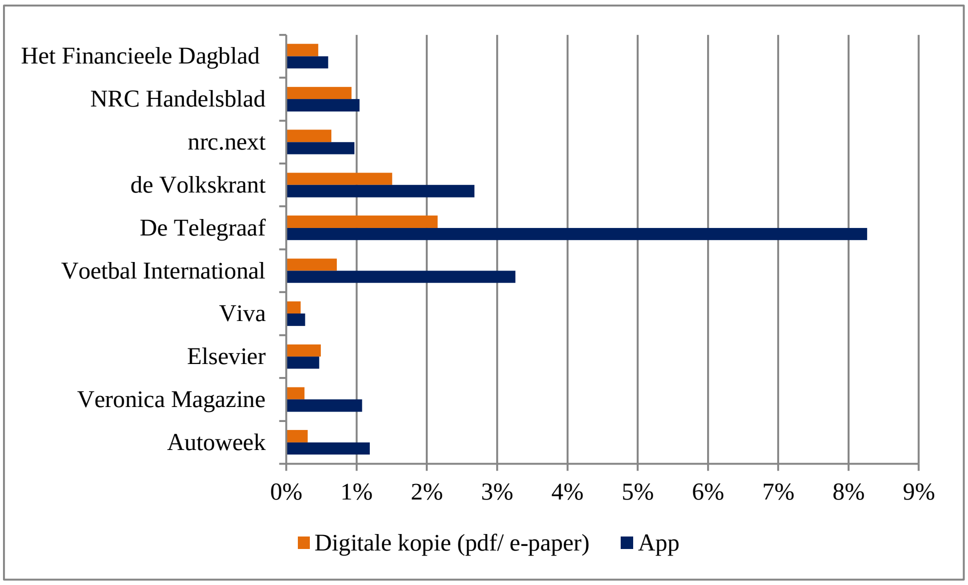
The device most used to access the brands is the computer (desktop or laptop), which makes sense because a computer is by now a common household appliance (73% of the population 13+ owns a desktop, 71% owns a laptop), while smartphones, tablets and e-readers, though increasingly common, are still relatively new. Figure 7 shows the device by which each brand is accessed. While on the medium type level are used by a larger group of readers than tablets, on the brand level the results are different: the tablet is larger than the smartphone for most brands. Exceptions are the two largest brands.

Figure 7. Use of digital devices



The websites of the brands are by far the largest formats that respondents read. The measurement of websites is not the aim of NOM, but is only included in the questionnaire to avoid confusion with and overclaim of digital copy and app. Looking at the results for digital copies and apps, it is apparent that those formats have not yet gained a large readership (see). Apps have a greater audience than digital copies.

Figure 8. Total audience (read in the past 12 months) of digital copy and app



Because the total audience is still rather small, the results of the frequency questions are too small to be used in a meaningful way.

Based on the results of the half year measurement, the Technical Committee concluded that the results looked plausible and promising. The e-reader was found to be too small for continuation in the brand questions. The frequency questions for format per device was to be replaced by a frequency question about the use of the different formats, regardless of the device used to access the format.

5. Next steps

The best way of measuring readership on digital platforms would of course be by tracking people's behaviour: do they open an app, do they download the digital copy, how many and which pages do they read, how long etc. As this is still not possible, the Technical Committee of NOM chose the next best thing: to ask about reading behaviour on digital platforms in the National Readership Survey questionnaire. The proposal to keep this block of questions in the survey and expand the number of brands to 20 was not supported by the NOM board. Although the board has defined NOM's domain as "to measure total reading in all its formats, i.e. irrespective of a platform" they thought that measuring digital reading in a questionnaire (claimed reading) is not the right thing to do. The Technical Committee was therefore asked to formulate the criteria and requirements for measuring digital reading behaviour. Possibly NOM can then join other audience measurement organisations which also pursue measuring digital behaviour (e.g. viewing and listening behaviour). Collaboration between different JIC organisation in order to get the best possible measurement of behaviour on digital platforms would be the best way to proceed.

References

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Saint-Joanis, G. & N. Cour, Print readership in a digital world, PDRF 2011, San Francisco.