AUDIENCE MEASUREMENT WORLDWIDE: LATEST DEVELOPMENTS

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Abstract

The Print and Digital Research Forum 'Summary of Current Audience Research' records the methodologies used by over a hundred different readership surveys around the world – as well as many specialist readership surveys. This gives an overview of the different techniques and questions in use, and how different surveys are meeting the challenges of audience measurement, such as respondent cooperation, interview length, and, increasingly, providing estimates for reading on digital platforms and devices as well as in print.

Thanks to our correspondents, the Summary has tracked developments and changes in audience measurement every two years since it was first published in 1981. The latest edition includes some brand new surveys and innovations. A country-by-country list of developments and changes is included in this paper. More broadly, the main trends noted since 2011 are:

- More surveys have introduced at least an element of online interviewing, and there are now four which conduct at least 80% of interviews by CAWI.
- While the majority of surveys continue to be conducted by personal interview, over the last two years a number have replaced pen and paper interviews with electronically assisted interviews, including the first examples of interviewing by tablets and hand-held devices.
- One of the key drivers of development is the requirement in an increasing number of markets to provide audience estimates not just for print but the range of digital platforms and devices carrying publisher content.
- The use of fusion is increasingly widespread as a practical way of extending the range of data delivered to users, particularly to integrate measures of the consumption of other media and digital/online reading estimates.

Introduction and acknowledgments

The 2013 Summary of Audience Research covers:

- 107 general population readership surveys in 81 different countries
- 58 specialist audience surveys, e.g. businessmen, children, specific issue readership etc.

We are also adding details for multi-media surveys, such as the IPA TouchPoints in Great Britain.
It would not be possible to compile the Summary without the help of the many contributors from around the world who took the time to update their survey details in the online database available on the PDRF website. I would like to thank all the contributors on behalf of the PDRF. I would also like to thank Jennie Beck, Jenny Davis and Andrew Green for their advice regarding contacts and new surveys.

This paper is divided into three sections:

1. An overview of the main developments and trends since 2011, including:
   1.1. New surveys and re-launches
   1.2. Trends in data collection methodologies
   1.3. Approaches to multi-platform measurement
   1.4. The growing use of fusion and modelling
2. An overview of methods of readership measurement
3. Developments listed country-by-country

Overview of main developments and trends since 2011

1.1 New surveys and major re-launches

A number of surveys have been launched in the last two years or which are new to the Summary. These are:

- **Australia** – A new survey **emma (Enhanced Media Metrics Australia)** was launched in August 2013, in competition with the existing service supplied by Roy Morgan Research. emma is carried out by Ipsos MediaCT, under appointment to The Readership Works. The data collection methodology is predominantly online.
- **China** – The **Media Atlas China** is a new addition, also conducted by Ipsos. Although predominantly face-to-face, around 20% of interviews are taken via a mix of other methods including PCLT (Pre-Recruitment Central Location Test), CAWI and CATI.
- **Hong Kong** - The **Media Atlas** is another new addition from Ipsos. This survey uses CATI for the main interview.
- **Norway** – There is a new magazine **NRS**, conducted by TNS Gallup. The survey is conducted largely (80%) by CAWI with respondents randomly selected from an access panel. The readership estimates from the survey are calibrated onto **Consumer & Media: Target Group Index (TGI),** along with website estimates from the official Internet Survey NIP and Scores.
- **Palestine –** The **National Readership Survey (NRS)** joins the other Ipsos readership surveys in the Middle East.
- **Switzerland –** a new generation **MACH BASIC** Survey has been launched, with a completely new dual mode data collection methodology: 40% of interviews are conducted by CAWI and 60% by CATI, the latter supported by a brochure of visual prompts which is sent to the respondents in advance. The methodology also includes passive measurement of the digital activity of a portion of the sample.
- **Vietnam** – The **Media Habits Survey,** conducted by Kantar Media, is new to the Summary. It is a face-to-face survey in six major cities.
- **Zambia** – Also new to the Summary is the **KARF Quarterly Audience Measurement Survey** from Ipsos Synovate. The methodology is a seven day paper diary to capture newspaper readership.

More information on most of these surveys can be found in the country by country overview of developments in the second part of this paper. The new surveys in Australia, Norway and Switzerland are all the subject of detailed papers which will be given in Nice.

1.2 Trends in the data collection methodology

There are two main developments to note over the past two years. The use of online interviews has increased and there are now four surveys which are conducted largely by CAWI, including the new surveys in Australia and Norway. The majority of surveys are still conducted entirely offline, however. There has also been an increase in the number of surveys using electronically assisted interviewing modes.

The methodologies used for the 107 national readership surveys can be summarised as follows:

	Surveys
Personal - pen and paper	48
Personal - CASI, CAPI, DS-CAPI, HAPI, TAPI, mobile ‘phone	16
Self-completion – paper	10
Telephone	11
Mixed methodology involving CAWI:	
• Largely CAWI (80%+ interviews)	4
• Partial CAWI (40-79% of interviews)	3
• Some CAWI (less than 40% of interviews)	8
Mixed methodology without CAWI	7

As can be seen above, the most usual data collection methodology continues to be a personal face-to-face interview. Well over half the 107 surveys use this method.

The majority of surveys carrying out personal interviews are conducted using pen and paper, although over the last two years a number of have introduced different forms of electronically assisted interviewing, including for the first time the use of tablets and hand-held devices. The surveys that have made these introductions are as follows:

To CAPI	Canada – Print Measurement Bureau Indonesia – Consumer and Media View
To DS-CAPI (Double Screen)	India – Indian Readership Survey
To CASI	Germany - MEDIA-ANALYSE ma Pressmedien (previously partial CASI)
To HAPI (Hand-held devices)	Ireland -Joint National Readership Survey (JNRS)
To TAPI (Tablets)	Uruguay - Estudio General de Medios (EGM)

The VALIDA Survey in Chile also uses HAPI for some interviews. Also the small proportion of face-to-face interviews taken by the new emma survey in Australia are carried out on an i-pad.

In total, there are now 16 surveys used a single mode of electronically assisted personal interviewing (up from 10 in 2011), and a further eight which use electronically assisted interviewing in a mixed mode approach, e.g. CASI and CAPI, or CAPI and CAWI. Taking these mixes into account, in total five surveys use DS-CAPI, 14 CAPI, three CASI, two HAPI, one TAPI and one mobile 'phone.

One of the trends noted in 2011 was that there were an increasing number of surveys using a mixed methodology, most of which included an element of online (CAWI) interviewing.

The number of surveys using CAWI has increased from eight in 2011 to 15 in 2013. This covers quite a range of solutions – from surveys which are predominantly online (using other data collection modes to include the offline population or to balance the online sample) to surveys supplementing their main interview mode with a small proportion of online interviews. In order to better track these developments, we have categorised the 15 surveys using CAWI according to the proportion of interviews collected online. These surveys are:

	Survey	**Methodology**	**Developments**
Surveys 80%+ CAWI:			
Netherlands	NOM Print Monitor	100% CAWI – completed online or with an interviewer present	
Australia	emma	90% CAWI, 10% Personal (CAPI on i-pad)	New survey
France	One Survey	80% CAWI, 20% DS-CAPI	
Norway	Magazine NRS	80% CAWI, 20% paper self-completion	New survey
Surveys 40-79% CAWI:			
Norway	Consumer & Media: Target Group Index (TGI)	60% CAWI, 40% paper self-completion	Previously 100% paper
United Kingdom	Target Group Index (TGI)	57% paper self-completion, 43% CAWI	CAWI increasing, some access panel sample included
Switzerland	MACH Basic	60% Telephone, 40% CAWI	Major re-launch
Surveys < 40% CAWI:			
Taiwan	Nielsen Media Index	Personal (CAPI), c.25% CAWI	
China	China National Resident Survey (CNRS)	Personal, 20% CAWI	CAWI introduced
Czech Republic	Market & Media & Lifestyle (TGI)	Personal (CAPI), 17% CAWI	CAWI introduced
Slovak Republic	Market & Media & Lifestyle (TGI)	Personal, CAWI	CAWI introduced
Hong Kong	Nielsen Media Index	Personal, CAWI	
China	Media Atlas China	80% Personal, PCLT, CAWI, Telephone	New Survey
Canada	NADBank	Telephone, CAWI	CAWI introduced, access panel
Portugal	Bareme-Imprensa	94% Telephone, 6% CAWI	

There are now four surveys which are largely conducted online (i.e. 80%+) with some elements of mixed methodology to represent the proportion of the population who are 'offline'. These are NOM in the Netherlands, The One Survey in France, the new emma survey in Australia, and the new Norwegian NRS. Strictly speaking, the NOM survey in the Netherlands is conducted completely by CAWI, though it is included as a mixed methodology as in some cases an interviewer will be present while the interview is completed.

For online interviews the distinction between method of interview and source of sample is a particularly important one, i.e. whether that sample comes from an online access panel or not. Some surveys use CAWI as their data collection mode, but recruit their sample 'offline', usually by telephone. This is the case for The One Survey in France, emma in Australia, and the new MACH Basic Survey in Switzerland. On the other hand, the new Norwegian NRS is sampled at random from an access panel. Other surveys may recruit some sample offline and some from access panels – the most striking example being NOM in the Netherlands, which uses a random probability method to select 42% of its sample, sending interviewers out to recruit these respondents, and sampling the remaining 58% from an access panel. There are also surveys which now take a proportion of interviews from an access panel sample, e.g. the TGI in the United Kingdom, and NADbank in Canada. In the case of NADbank, this is specifically to augment the existing telephone sample with online interviews conducted in cellphone-only households in Toronto, Montreal and Vancouver.

The six surveys using a mixed methodology not involving CAWI are as follows:

Austria	Media Analysis (MA)	Personal (CASI/CAPI)
Belgium	CIM Press Survey 2012-3	Personal (CASI 80%/CAPI 20%)
Bulgaria	Target Group Index	Personal (newspapers and weekly magazines) and Self-completion (monthly magazines)
Chile	VALIDA	Personal (some HAPI)
Spain	Estudio General de Medios (EGM)	Personal (CAPI) + Telephone
Ukraine	National Readership Survey	Telephone and Personal
United Kingdom	JICREG	Personal or Telephone

Some surveys formerly using a mixed methodology now use a single mode. The MEDIA-ANALYSE ma Pressmedien in Germany, for instance, is now fully conducted by CASI, and the National Readership Survey in the United Kingdom has ceased offering the option of a paper self-completion questionnaire to improve response rates, in favour of extending a scheme of respondent incentives from London to parts of South East England.

1.3 Measuring digital platforms

One of the main methodological issues facing many surveys is how to measure the digital platforms on which publisher content appears, in order to provide publishers with an estimate of the extended reach of their brand. The growth of access to content via mobile and tablets has only added to the complexity of the issue.

The Summary now collects information on how different surveys around the world are approaching this issue, though some care is needed in interpreting the findings, as we do not have a full set of data for all surveys.

Of the 107 surveys included in the Summary, 52 have responded that they do ask questions about reading on publishers' digital platforms, though this may be an under-estimate for the reason above. Some surveys don't ask questions directly but use fusion or passive measurement techniques as a way of providing data on digital reading, and some both ask questions and carry out fusions/calibrations, using the data collected within the questionnaire to inform the process.

	Surveys
Questions asked about digital platforms	52
No questions about digital platforms, but fusion/off-survey technique	4
No questions about digital platforms	19
Not stated/not available	28
Surveys using fusion/calibration/modelling to integrate digital estimates from other sources	17

Almost all the surveys that ask questions about digital reading, ask about websites. In addition, 27 ask about apps, and 19 about digital editions.

Some surveys ask about general readership on digital platforms (or devices). Of those asking about digital readership of specific publisher brands, only a limited number gave us information about the number of publisher brands they asked about. The range was from 6 to 231, but it was clear most are not attempting to measure digital reading for their full media list, but rather concentrating on the brands with the biggest digital presence.

The most usual technique is to add these questions after the questions on print readership are complete (thereby avoiding the risk of disruption to the print estimates). There are many examples of this. A paper describing a test of such an approach will be given by Irena Petric and Alke Bassler in Nice, entitled 'Print Plus: Measuring Digital Print Platforms'.

While adding questions on digital reading once the print readership questions are complete is a very pragmatic approach, particularly if the list of brands for which digital reading will be asked is relatively small, there are exceptions of surveys which have introduced a 'brand first' approach i.e. seeking to establish whether there has been any contact with the brand in print **or** digital before establishing the specific platforms, and readership questions as appropriate. Arguably this approach will be a more natural one for those respondents who read across a variety of platforms, and reduces the risk of digital estimates being erroneously inflated by the desire to make a positive claim for contact with a brand which was actually in print (and vice versa). Two examples of brand-first surveys in the market are the Gfk MRI Mediamark survey in the USA and the CIM survey in Belgium.

Not all the surveys that include questions on the reading of specific publisher brands on digital platforms publish the estimates – some are for internal use only, or to assist with fusion etc. However most that do publish estimates, do so directly from the survey data, notwithstanding the fact that it is increasingly acknowledged that digital estimates based on a recall methodology are problematic and difficult to take at face-value. Respondents are unlikely to remember, or even be aware of, the full range and frequency of their digital behaviour, particularly when it comes to infrequent and fleeting visits. Respondents may be unclear which specific digital platforms they have used, and also make erroneous claims as to whether the contact was in print or digital, particularly if there is a desire to make a positive claim for contact with the brand. Despite these limitations, a recall methodology may be seen as "the best we can do in the circumstances".

The alterative course of action is to find a way of incorporating passive measurement – either within the survey itself or by fusing/calibrating to passive data collected an external source, and an increasing number of surveys are doing this by a variety of means. The surveys which told us they were making use of passive data collection either directly or indirectly are:

Australia	emma	Fusion with Nielsen
Canada	Print Measurement Bureau (PMB)	Fusion with comScore
China	Media Atlas China	
France	One Survey	Fusion with mediametrie
Germany	Media-Analyse ma 2013 Pressemedien	Fusion
Netherlands	NOM Print Monitor	Fusion of NOM data and STIR Internet data within NPDM database.
New Zealand	Nielsen Media Research National Readership Survey	Fusion
Norway	Magazine NRS	Via TGI which integrates passive measures of digital/online reading.
Norway	Forbruker & Media (Consumer & Media)	Passive measures integrated
Norway	Consumer & Media: Target Group Index (TGI)	Passive measures integrated
Romania	SNA FOCUS (NRS)	Fusion
Sweden	ORVESTO Consumer	Passive measurement and monthly integration of Internet audience data.
Switzerland	MACH Basic	Passive measurement via tag on CAWI interviews
Thailand	Consumer Media View	
United Kingdom	Target Group Index (TGI)	Respondents recruited to take a meter, and TGI Clickstream data fused.
United Kingdom	JICREG (Joint Industry Committee for Regional Media Research)	Off survey technique - JICREG Portfolio Project provides integrated readership and website data.
United Kingdom	National Readership Survey (NRS)	Fusion to comScore to create NRS PADD
USA	Survey of the American Consumer, GfK Mediamark Research & Intelligence	Fusion

1.4 Fusion, calibration and integration with other currencies

As seen above, fusion and modelling and calibration techniques are used by a significant minority of surveys in order to integrate passively collected measures of digital reading with print readership data. We also asked about other uses of these techniques.

In total out of 107 surveys, 34 told of us of fusion, modelling and calibration work they do to integrate other data with the print readership currency, or, in some cases, feed the print data into other databases. Most of these surveys integrate more than one additional dataset as follows.

	Surveys carrying out fusion, modelling or calibration
With marketing data collected in a separate questionnaire	14
With digital/online reading estimates	17
With measures of other media consumption, e.g. TV, radio etc.	19
With additional information about readership collected in a separate questionnaire e.g. audience accumulation, quality of reading	11

2. 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 use Specific Issue Reading (Netherlands and Japan). In the USA the Issue Specific Study is carried out separately from the main currency by GfK MRI.
No surveys use Through the Book (TTB), other than the Australian Ray Morgan survey which employs TTB for business titles, while other publications are measured by the Recent Reading model.

Title prompts

Publications are prompted as follows:

	Surveys
Grouped title mastheads	9
Single title mastheads	66
Recent covers of magazines (for Specific Issue)	2
No mastheads (typescript or telephone)	26
Spontaneous day after recall	2
Not stated	2

Two of the new surveys are using front covers as part of their visual prompts for magazines (although not collecting specific issue readership). The new Norwegian magazine NRS shows a masthead for each magazine, but also two front covers. emma in Australia prompts newspapers with coloured masthead, and does the same for magazines at the 12-month screening question. However, for the AIR question the visual prompt shows the three most recent covers of the magazine in question asking readership for each. AIR is derived from answers with regard to just one of the three covers shown (the oldest cover for paid magazines and the youngest cover for newspaper inserted magazines).

Of the 75 surveys using mastheads, 33 explicitly state that they use coloured mastheads rather than black and white.

The screen-in question

Most (88) of the surveys have a separate screen-in filter question, with specified screen-in periods as follows:

	Surveys
Past/last 12 months	30
Past year	6
Past 6 months	6
Past 3 months	2
‘In the last months’/ ‘few months’	2
Past 7 days	1
Different periods used by publication frequency, ranging from past 7 days to past 12 months	42

Of the 18 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 19 surveys the options are hidden.
The order of presenting publications is fixed (by publication frequency) for 49 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	78
Verbal	5
Verbal with some numeric explanation	14
Mixed numeric/verbal	3
Frequency not used/ or specific issue	7

Source of copy and readership engagement questions

Of the 107 surveys, the majority (83) include quality of reading/engagement questions. Source of copy is the most popular choice of question, followed by time spent reading.

3. Overview of developments by country

Many of these developments have already been referred to in the paper, but for ease of reference here is a complete list by country of what our correspondents told us.

Australia – **emma (Enhanced Media Metrics Australia)** was launched in August 2013 as a new readership survey in competition with the existing service supplied by Roy Morgan Research. emma is carried out by Ipsos MediaCT, who were appointed by The Readership Works in September 2010 to develop and implement a new readership measurement metric for newspapers and magazines in the Australian market.

The methodology used is a primarily online collection mode (90%), following recruitment largely carried out by CATI (91%). Recruitment includes mobile-only households, as well as households with landlines. A small proportion of respondents are recruited door-to-door, and a small proportion of respondents are interviewed using CAPI on an i-pad. The total annual sample for the readership survey is 54,000. Respondents will also be recruited to take part in a second survey covering newspaper sections, attitudes and activities, product usage and so forth, which around half of the annual sample complete.

Numerous tests were carried out into different aspects of the methdology, each of which would make an interesting Symposium paper in its own right. The tests are listed in a paper which will be given by Andrew Green and Heather White in Nice, entitled ‘Australia: Building a 21st Century Readership Survey’. The paper also gives a broad overview of the methodology. Average issue readership estimates for newspapers and magazines tend to be substantially higher than the market has been accustomed to see, and some explanations for this are also outlined in the paper.

Belgium – The **CIM Survey Press and Plurimedia** has introduced questions on the use of pdf versions, apps and websites. It screens out respondents who have not read in digital, then has a double screen-in to establish reading in print and reading in digital. This is followed by questions on readership in print, then questions on readership in digital.

In addition, CIM has dropped the leave-behind self-completion questionnaire previously used to collect data on purchasing habits etc. CIM now reports twice yearly.

Brazil – The **Estudos Marplan EGM** has expanded to cover 13 metropolitan markets (previously nine), with an increase in sample from around 53,000 to over 60,000.

Canada – The **NADbank** newspaper survey has continued with its programme of development tests looking at sampling issues and newspaper readership across platforms.

One outcome is that NADbank now augments the existing telephone sample with a cellphone-only household sample in Toronto, Montreal and Vancouver, sourced from an online panel. The use of online panel sample in this way is seen as the first step towards a hybrid sampling methodology.

NADbank has also assessed the full brand footprint for newspapers, including PDF editions and mobile apps as well as printed editions and newspaper websites. The test was intended to determine the right questions to ask and how to provide metrics for all forms of content/distribution channels. The results of this test have been implemented in the 2012 data release, which now incorporates PDF and mobile app newspaper readership.

Finally, website readership curves have been released so as to inform the release of a cross platform reach planning tool.

Canada – The **Print Measurement Bureau (PMB)** introduced computer assisted personal interviewing (CAPI) in January 2013.

Chile – **VALIDA** is now reporting monthly. It has included digital papers in the questionnaire, and also now uses some HAPI (hand-held personal interviewing) when collecting the interviews.

China – The **China National Resident Survey (CNRS)** now offers respondents both online and offline questionnaires once recruitment is complete. It is now taking 20% of interviews online and expects this to grow.

CNRS has also made improvements to boost representation of high-status communities. More high-end communities have been added to the CNRS sampling frame to reflect the fast economic growth of China. On average, the proportion of high-end communities increased from 8% to 15%.

China – **Media Atlas China**. The Media Atlas in China is a new addition to the Summary of Surveys. MAC aims to provide a comprehensive picture of Chinese consumers and their relationship with products/brands and media.

In methodological terms MAC is a truly mixed mode survey. The annual sample of 60,000 is achieved by a mix of face to face interviews taken door-to door (c.80% of interviews) but also interviews taken by PCLT (Pre-Recruitment Central Location Test), online and by CATI.

Czech Republic – The **Market and Media Lifestyle Survey (TGI)** now collects 17% of interviews using CAWI.

Czech Republic – The **Media Projekt** has included a boost sample of respondents who are hard to contact, such as managers, directors, leaders etc. All interviews are now recorded and partially verified. The interview time has been cut from 100 to 25 minutes.

Finland – The **Kansallinen Mediatutkimus (KMT)** has added questions about readership on tablet, mobile, computer for the biggest platforms.

France – **The One Survey** is now well-established. A paper taking stock of the survey and changes introduced will be presented in Nice, including future plans for digital measurement. Since the last Symposium, The One Survey has carried out a rotation test between dailies and magazines to evaluate order effects. It has also commenced publication of readership data for regional dailies based on a 24 month sample (70,000 interviews).

Germany – The **MEDIA-ANALYSE ma Pressmedien** has completed the transition from a mix of pen and paper and CASI to 100% CASI. After much testing, from August 2013 respondents from the main print survey will be recruited to take part in an additional two-week measurement of their readership of newspapers and magazines, which will be captured via bar-code scanning.

Hong Kong – The **Nielsen Media Index** has enhanced questionnaire coverage of Internet activities (e.g. online shopping) and mobile devices (e.g. mobile apps, mobile activities etc.)

Hong Kong – The **Media Atlas** is a new addition to the Summary, using a telephone methodology for the main interview.

Hungary – The **NRS** now reports CPI - Contact per Issue.

India – The **Indian Readership Survey (IRS)** has a number of developments to report. Double screen CAPI is being used for the entire sample size of 235,006. All mastheads have been digitised to be shown in colour on-screen. Data fusion technology is being used for the first time.

Online reading is measured by asking respondents which dailies and magazines they read online most often, up to a maximum of five each, and regardless of platform.

In August 2012 The Media Research User's Council (MRUC) awarded Nielsen the contract to carry out the new Indian Readership Survey (IRS), and we await news on the further development of this survey.

Indonesia – **Nielsen Consumer and Media View has** introduced CAPI interviewing. Fusion is now used to add product consumption information. An additional city has been included in the survey.

Iraq – The **National Readership Survey (NRS)** has an increased sample, and is now reporting twice yearly.

Ireland – In June 2012 the **Joint National Readership Survey (JNRS)** introduced electronic data collection using handheld devices (HAPI). JNRS has also introduced questions about the frequency and recency of reading the subscribers' titles online. On the other hand, the question on the frequency of reading newspaper magazines was removed in February 2013.

Italy – **Audipress** are planning a test of online/digital readership.

Netherlands – The **NOM Print Monitor** has two major projects to report. The first is 'Project Opportunity To See Advertising'. Using a separate study NOM has created two prediction models for advertising exposure (separately for newspapers and magazines). The intention is to implement these models into media planning systems for newspapers and magazines.

The second project is a test within the readership survey measuring readership of individual titles on digital/mobile platforms, which has been running since January 2013. Irena Petric and Alke Bassler will present a paper on this test at Nice, entitled 'Print Plus: Measuring Digital Print Platforms' which gives numerous insights into the practical issues involved in asking respondents about their digital reading.

Norway – there is a new **NRS** for magazines, conducted by TNS Gallup. The survey is conducted largely (80%) by CAWI with the intention to move to 100% CAWI, with an emphasis on designing the survey specifically for online completion. Respondents are randomly selected from an access panel. The readership estimates from the survey are calibrated onto **Consumer & Media: Target Group Index (TGI),** along with website estimates from the official Internet survey NIP and Scores.

One major development is the introduction of Gross Exposure Points (GEP) for magazines as a new currency. This is an estimate of page exposures for each reader of a magazine based on average issue readership, number of reading occasions and a readership engagement score (amount of magazine read on an average reading occasion). More details of GEP, and the new survey as a whole, can be found in the paper '3XNew – A New Era for Magazine Research in Norway' which will be given in Nice.

Also in Norway, the **Consumer & Media: Target Group Index (TGI)** has itself made the transition from 100% paper to c40% paper and 60% web in 2011.

Palestine – The **National Readership Survey (NRS)** is a new survey included in the Summary**.**

Russia – The **National Readership Survey** has increased the share of mobile phone numbers used in NRS Moscow to 20% of sample, and in St Petersburg to 15%.

Saudi Arabia – There is now a **National Readership Survey (NRS)** for locals and another for expatriates.

Slovak Republic – The **Market & Media & Lifestyle – TGI** has introduced some CAWI interviews.

Switzerland – In April 2012 fieldwork commenced on the new generation **MACH Basic** Survey, with some very major changes.

Respondents are recruited by telephone, with a new sampling strategy to ensure the inclusion of unlisted landlines and mobile-only households. Incentives of 8 Euros have been introduced to encourage response.

For the main interview there is dual mode data collection: in 2012/13 40% of interviews were conducted by CAWI and 60% by CATI, the latter supported by a brochure of visual prompts which is sent to the respondents in advance. (The survey was previously CATI only, without visual prompts). Respondents with access to the Internet are randomly selected to take either an online or CATI interview. This enables a direct comparison of the estimates achieved by an online interviewing mode versus CATI: readership estimates tend to be lower in the CAWI portion of the sample.

The questionnaire has been extended in order to cover usage of the digital channels of each brand. In addition, a portion of the CAWI sample receives cookies to passively track behaviour on the browser used to complete the questionnaire. This gives a fascinating insight into the difference between claimed and actual behaviour for digital platforms. In general the survey data based on recall results in higher reach figures than the tracking data.

For more detail please refer to the paper by Harold Amschler and Jella Hoffmann of WEMF, which will be given in Nice: 'The New Swiss National Readership Survey: Fit for the Future'

Thailand – The Nielsen Media Index has renamed as **Consumer Media View** and no longer includes a portion of online interviews.

United Kingdom – The **National Readership Survey** launched NRS PADD in 2012. This is a fusion of NRS data with passively collected websites estimates from comScore, who were appointed as the supplier of digital audience data to UKOM in 2013 (the previous supplier was Nielsen). NRS PADD data are released quarterly.

In October 2013, experimental questions have been added to the questionnaire covering all digital platforms for 36 publisher brands (previously only websites were measured for a selection of brands). Consideration is also being given to a more radical development of the questionnaire, and the possibility of a 'brand-first' approach.

United Kingdom – **JICREG** (Joint Industry Committee for Regional Media Research) is a database of readership surveys and modelled data for regional newspapers. At the beginning of 2013 JICREG reached an agreement with the National Readership Survey to include local daily and weekly newspapers on the NRS. Although the NRS has always included a number of local daily titles, as of 2013 approximately 700 titles included, using customised prompting by post code sector for the many weekly titles, and regional prompts for the regional daily newspapers. The data will be provided to JICREG to model readership for local newspapers (NRS will not publish estimates directly from the new data. The aim is that JICREG will introduce the modelled data to the market in the final part of 2015. Until then the current system of publisher funded research and modelled readership/website usage remains in place.

United Kingdom – A proportion of **Target Group Index (TGI)** is now placed via an online panel. The proportion of interviews completed online has increased from 25% to 43% of the sample.

Uruguay – The **Estudio General de Medios (EGM)** has introduced TAPI (Tablet Assisted Personal Interviewing).

Vietnam – The **Media Habits Survey** is new to the Summary. It is a face-to-face survey in six major cities, four of which have doubled their sample sizes in 2013, enabling reporting on three month rather than six-month periods. A product consumption survey will soon be added.

Zambia – The **KARF Quarterly Audience Measurement Survey** is also new to the Summary. The methodology is a seven day paper diary to capture newspaper readership. The Media Cell is currently being piloted as a passive audience measurement tool for electronic broadcast media.