Breaking and making: A new measurement service for the British published media

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Abstract

The British published media are currently finalising the details of a new audience measurement service, AMP (Audience Measurement for Publishers) which will replace the National Readership Survey in 2016. From the dramatic starting point of unilateral action by the newsbrand publishers who felt the NRS no longer fully served their needs in an multi-platform age, the industry as a whole has come together to review their requirements, and the principles of a 'joint industry committee' are re-affirmed.

The key objectives of the new service are to increase the number of digital platforms having estimates reported and offer reach and frequency planning across all those platforms. Particularly notable is the investment in single source data to inform the process of data integration with comScore. Data on duplication of reading between the various print and digital platforms will be delivered by a panel recruited from readership survey respondents who will have their digital behaviour monitored across all devices. At the same time, the quality of the readership survey sample is retained, and the questionnaire will be re-designed with a brand-first approach designed to capture reading in the digital age.

Background

In July 2014 there were some dramatic developments in the world of British audience measurement, as reported by the advertising industry magazine Campaign:

> "News brands are continuing their attempts to better-represent themselves in the digital age with the shock decision last week to call a review of their 58-year relationship with the National Readership Survey.
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> It appears that tensions around how the industry measures cross-platform readership in this new era of media consumption have reached breaking point.
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> The action by the Newspaper Publishers Association throws the future role of the NRS in doubt and will have implications for its other stakeholders…….
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> The NRS, which has a statutory 18-month contract with the NPA, has now been served notice. A consultant will be drafted in with a view to creating a brief and request for proposal for a new robust audience measurement solution this autumn."[i]

In common with the other media in Great Britain, audience measurement of readership is currently funded and governed by a 'Joint Industry Committee'. In the case of the NRS, governance is shared between the NMA (News Media Association – formerly the NPA), the PPA (Professional Publishers Association – representing magazines) and the IPA (Institute of Practitioners in Advertising).

The newspaper action was unilateral. As such, it threw into question not just the future of the NRS as a survey, its methodology and outputs, but the joint industry governance as a whole.

The NMA appointed an external consultant, Jed Glanvill, former CEO of Mindshare, to oversee the audience measurement review. Mediatique, a strategic advisory firm run by Mathew Horsman, was appointed to work with Glanvill. An Advisory Group made up of representatives from the IPA and PPA, as well as the then NPA, was set up by Glanvill. A consultation process then began, culminating in the release of a Request for Proposals in late 2014.

After the first round of proposals, a Final Round Questionnaire was submitted to finalists GfK, Kantar and Ipsos in March 2015. The outcome of the final phase of the pitch process was that Ipsos were appointed as the contractor for the new service, in a partnership solution with comScore.

Decisions on the funding and governance of the new service were made in parallel to the pitch process. There will continue to be a joint industry solution, as the NMA, PPA and IPA have joined to form a new company to fund and manage audience measurement for the published media in Great Britain. This company is called The Publishers Audience Measurement Company (PAMCo) and will replace NRS Ltd, which will wind-down by the end of 2015. The new service run by PAMCo will be called Audience Measurement for Publishers (AMP).

Context and key objectives for the new service

In the UK, as elsewhere, the published media are confronting shifting business models. Audiences are moving online, with new digital readers offsetting the loss in print audience for some brands. Monetising this shift remains a challenge, however, particularly as digital audiences tend to be sold at a much lower CPT than print audiences. The response of different publishing groups has been very various, both for the newsbrands and the magazines. These range from open access strategies designed to develop the greatest possible brand footprint, to subscriber based solutions focused on developing relationships with much smaller groups of committed readers.

As the Campaign article above notes, there was an underlying perception in the market that in order to better monetise digital audiences a more sophisticated measurement of those audiences was required.

The Guardian's 'Audiences not Platforms' project had provided particular inspiration. Now in its second iteration as a shared project with The Telegraph, 'Audiences not Platforms 2.0' is a cross-platform reach and frequency planning tool featuring 200 different Guardian and Telegraph channels, including different print products, apps, digital sections, and ad networks.[ii]

The current NRS has included digital audience estimates in its NRS PADD report since 2012, first incorporating estimates for pc website audiences and later adding mobile audiences for a selection of brands:

- PC Website audiences were first incorporated when NRS PADD was launched in 2012. NRS PADD is a fused database, fusing the comScore panel which measures visits to pc websites with the NRS database. NRS PADD currently reports data for over 80 pc websites connected to publisher brands. It is possible to carry out reach and frequency planning using these data, in combination with print audience data or stand-alone. A paper describing the fusion methodology was given at the San Francisco PDRF.[iii]

- NRS PADD was extended in September 2014 (just after the NMA's announcement of a review) to include audience estimates for 26 of the largest mobile brand audiences, 13 newsbrands and 13 magazine brands. A fusion with comScore was not possible, as at the time there were no appropriate respondent level data from comScore to fuse to as comScore based their estimates on the GSMA mobile 'phone operator data. (Subsequently comScore have launched a panel-based mobile measurement metric in Great Britain.) In the absence of respondent level data, the NRS solution was to ask about readership via mobile platforms within the NRS questionnaire and calibrate responses to match comScore's published estimates.

The inclusion of the pc website and mobile audience data by NRS PADD created impressive headlines as to the overall reach of publisher brands. In three years the rather depressing headlines about the ongoing decline of print audiences that tended to accompany the release of each new set of NRS data have been transformed to a positive story of growing mobile audiences and extensive brand reach.

However there were a number of limitations in respect of the NRS PADD outputs, which it is fair to say, had been bolted onto the existing NRS survey:

- Magazine publishers felt that the duplication of print and pc readership was understated in NRS PADD, as the fusion did not reproduce such duplications well for the smaller brands, largely due to sample size constraints. On the other hand, estimates of print and pc duplication gleaned from participant recall data are likely to over-state such duplication, and not be a realistic guide to what the fusion ought to deliver.

- In respect of the mobile platforms, there were limitations due to the calibration approach selected in the then absence of respondent level data. Only a limited number of brands could be included within the existing NRS questionnaire, due to concerns over participant load. Reporting for the mobile platforms was limited to reach (albeit by a small selection of demographics) and it was not possible to carry out full reach and frequency planning for these platforms.

Therefore key objectives for the new service were:

- To facilitate reach and frequency planning across all types of digital platforms, and for as many of those platforms as possible.

- To allow more granular analysis of specific platforms, including different types of digital content – inspired by the Guardian's 'Audiences not Platforms' project, but extending comparisons to all brands on a like-for-like basis.

- To better understand and reflect duplication of readership between platforms, and in particular between print and digital platforms, in order to more closely reflect true overall brand reach and the opportunities for advertising effectively across combinations of platforms.

- To be designed in such a way as to facilitate the addition of measurements for any emerging digital platforms once critical mass was reached.

Another aspect of the pressing requirement to monetise published media audiences better, particularly in the digital space, was the desire for engagement data which would demonstrate the value of the published media and the quality of the content/environment they provide to advertisers.

The importance of providing the best possible measurement of print audiences was not overlooked. Key considerations were:

- To minimise the possibility of participant confusion between digital and print platforms (and any potential over-claim of the latter) by adopting a 'brand-first' approach.

- To obtain the best possible sample, and maximise effective sample size and the statistical stability of the reported estimates.

Overview of AMP methodology

Ipsos have been appointed as the contractor for the new service following an intensive pitch process. In order to meet the requirements for the new service there are many developments relative to the current NRS, in particular the recruitment of a single-source panel to measure digital behaviour and a range of modelling and data integration techniques. At the heart of the survey is a high-quality random probability sample of in-home interviews.

Many details of the proposed methodology for the new AMP service are still being decided and others will be refined as the testing programme proceeds. A range of qualitative tests are planned for the last quarter of 2015, with a large-scale quantitative pilot running in Quarter 1 2016. Below is overview of what is planned.

At the heart of the AMP service will be a large enumeration/readership survey conducted in-home, with a similar size and quality of sample to the current NRS, i.e. random probability sampling. This survey will:

- Collect enumeration data (e.g., demographics, device usage, general media consumption habits). These data will be used for reporting, data integration and modelling.

- Recruit participants to participate in the digital panel described below.

- Collect print readership audience estimates and other relevant data e.g. engagement with individual publisher brands.

More detail on the readership and engagement questions can be found in the next section of this paper.

Alongside the enumeration/readership survey will be a digital panel, expected to have an in-tab reporting sample of 5,000 participants:

- Panellists will be recruited from the survey participants. As participants have already provided information on which print titles they have read the panel will provide a single-source overview of duplication between print and digital platforms.

- A specially designed Tracker App (designed by comScore) will be installed on all the panellists' devices i.e. pcs, laptops, mobile, tablet. The objective is to get a complete view of behaviour across devices.

- Alternative arrangements will be made for registering workplace devices, though workplace usage is inevitably more difficult to represent.

A key feature of the new service, and Ipsos's proposal, was that panellists should be recruited in-home at the time of the face-to-face interview. The expectation is that this will maximise take-up both to join the panel and then to ensure that as complete a set of devices as possible are registered for each panellist.

The Tracker App will measure contacts with published media sites and apps tagged by comScore. Only specified published media sites/apps will be tracked (i.e. those requested by publishers). The Tracker App does not measure all digital behaviour, in order to make it a relatively 'light' device to install.

The digital panel will provide inputs for the data integration and modelling procedures used to bring together print readership estimates (from the AMP survey) and digital platform estimates (from comScore), particularly in respect of reflecting appropriate levels of print and digital duplication.

It is not the intention to report digital platform estimates directly from the panel. Instead, estimates in a fused AMP/comScore database will be calibrated to match comScore at a top line level, and to match comScore's estimate of duplication between pc and mobile platforms. comScore have however expressed a willingness to look at using AMP data on the duplications between digital platforms as a feed for their own calculations.

Estimates will be reported for each of the following platforms, both individually by platform and de-duplicated in any combination of platforms

- Print
- PC website
- Mobile phone
- Tablet

Digital-only publisher brands will be reported in addition to those with both print and digital platforms. It will be possible to break out estimates for Apps.

It is expected considerably more digital platforms will be reported than was possible for NRS PADD, with no limitation on the number of platforms that can be reported providing they reach the agreed sample thresholds.

In addition, AMP will report on specific sections/content visited, subject to publishers agreeing an appropriate dictionary and putting the necessary tagging in place. This will include specific sections of newsbrand sites (e.g. sport, travel). It can also include specific parts of sites relevant to magazine brands (e.g. customer magazines may wish to break-out the content section of their brand's commerce site).

One key decision for stakeholders which was debated at length was whether or not estimates for the digital platforms should be calibrated to comScore. Of course, there was an attraction in publishers taking control of measuring their own digital platforms, and this was considered. However, the reasons why AMP will match comScore's estimates, rather than issue its own digital estimates for the published media, are as follows:

- Published media wish to have a level playing with all other digital brands in the universe. Buyers have told PAMCo this is critical to enable like for like comparisons and it would be unhelpful for PAMCo to release a different and conflicting set of numbers to comScore/UKOM which is the de facto currency in Great Britain.

- With a sample of 5,000, the panel is too small to provide direct measures for more than a small number of brands. Its purpose is instead to strengthen the inputs for the data integration and modelling and in particular provide a high-quality source of data on print and digital duplication to enable net reach to be calculated more effectively than has been possible in the past. The panel will also yield many valuable insights on how readers move between platforms and their level of behavioural engagement.

The readership and engagement questions

The questionnaire used to collect readership data is being designed to:

- Reflect the reality that many readers now read across both print and digital platforms and so a questionnaire which focuses on print reading and asks about digital reading separately is no longer appropriate.

- Reduce the potential for confusion between print and digital reading (and possible over-claims for print). This was a key requirement of the newsbrand publishers.

- Provide an enhanced way of prompting magazines.

- Collect audience accumulation data for magazines.

In summary, the changes proposed at the time of writing are:

- The RPY 'screen-in' question for AMP will adopt a 'brand-first approach', i.e. RPY reading on any platform. (NRS has a print RPY screen-in specifically instructing participants to exclude digital).

- The qualification that reading must be for two minutes or more will be removed. In the context of asking about both print and digital reading this makes sense, and is not expected to make a difference to the estimates obtained.

- For magazines both recency and frequency data will be derived from a 'Specific Issue Readership' (SIR) technique based on showing six (or four) recent covers and asking the respondent to identify which specific issues they have read. There are no plans to publish readership estimates for specific issues, only AIR. However, SIR will yield data on how magazine audiences accumulate over time, which will be an integrated part of the PAMCo outputs. This should be a valuable resource for the magazine publishers to feed into market mix models. The PPA's 2012 study 'Magonomics'[iv] demonstrated that correctly distributing magazine audiences over time led to an uplift of 19% in magazine ROI, and there has been similar work conducted elsewhere, much of it presented at the PDRF.

- The newsbrand print AIR measure will continue to be collected via the recency model; however the newsbrands are testing a new frequency of reading question. This is likely to extend slightly the current verbal scale but phrase the numerical calculation in respect of issues out of five for weekday editions (rather than out of four as the current NRS does) and out of four for weekend editions.

- Questions on the frequency of reading publisher brands on-screen will be asked for all brands. Data from these questions will not be published. Instead they have a twofold purpose. The first is to minimise the risk of confusion between print and digital claims, by giving the participant the opportunity to make a positive claim for digital. The second is to provide data for the purposes of adding the various data integration and modelling processes the new service will employ.

- In addition to source of copy, there will be new questions on engagement, i.e. actions taken and attitude statements on trust and influence. The questions are to be asked of frequent digital visitors to the brand, and average issue readers of the printed title.

The possibility of a separate engagement study is also under consideration. The objective would be to provide evidence of the value of the published media environment to advertisers relative to other media, and in particular demonstrate the value of quality content in the digital space. Newsworks and Magnetic, the marketing bodies representing the newsbrands and magazines, are considering the potential specification for a joint project of this nature, alongside the main AMP service.

Key features and benefits of AMP

The key features and benefits of the new AMP service will be:

- Full reach and frequency planning across all platforms.
- The inclusion of audience estimates for many more individual brand digital platforms than it was possible for NRS PADD to include.
- More granular analysis, including specific channels of digital content e.g. sport, business sections etc
- Single-source data to ensure print and digital duplications (and therefore overall brand reach) are better represented and inform understanding of reading behaviour in the digital space.
- Data on the accumulation of audience over time for the magazine brands, which will be integrated into the AMP database.
- The firm foundation of a high quality random probability sample and in-home interview. It is believed that the latter will deliver the best possible measure of print readership, and optimise recruitment to the digital panel.

Conclusion

The development of the new AMP service is at an early stage. Some of the information outlined in this paper will no doubt change as the new service is tested and takes shape. There will be many technical issues to resolve along the way.

It will be apparent that quality has taken precedence over cost-cutting. Indeed, the new service is expected to cost significantly more than the current NRS, largely as a result of the decision to invest in the digital panel. Particularly notable is the investment in single source data to inform the process of data integration with comScore. At the same time, the quality of the readership survey sample is retained, and there is a commitment to an interviewer-administered interview.

As such, AMP represents an impressive commitment and investment in the future on the part of stakeholders.

Once the market has the new AMP dataset and the ability to carry out reach and frequency planning across many more platforms than the current NRS, it is vital stakeholders reap the reward of their investment. This will require consideration of the trading models and a parallel process of workshops is planned to inform this development. This process will also stimulate thought as to what further metrics are required to compete effectively in the digital space, over and above the traditional reach and frequency model.

References

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