What's new? The PDRF worldwide review of audience measurement

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Abstract

This paper presents an overview of the PDRF's biennial review of audience measurement around world. The review covers a hundred different general population readership surveys around the world. Specialist readership surveys are also included. Details for each survey are published in the 'Summary of Audience Research' section of the PDRF website. The review reveals how audience measurement surveys in this field are developing and new techniques, particularly in respect of measuring digital platforms and the rise of online as an interview mode. It also provides an overview of the different techniques and questions in use, allowing different surveys to be compared.

Introduction and acknowledgments

The 2015 PDRF Summary of Audience Research covers:

- 103 general population readership surveys in 78 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 PDRF's online database. 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:

- An overview of the main developments and trends since 2013, including new surveys and re-launches
- An overview of the methods of readership measurement
- Developments listed country-by-country.

Overview of developments

The key themes noted this year are as follows:

- The main development challenge continues to be the desire to report digital audiences in combination with print audiences, and provide estimates of total brand reach for publishers. There are a number of different strands of development that were highlighted in contributors' reports this year:

    - A number of surveys reported that they have introduced a brand-first approach, or will do so in the near future.
    - The measurement and inclusion of digital editions was mentioned specifically by a number of contributors, with some surveys combining audiences for digital editions directly with the print measurement (i.e. without separating the two).
    - A number of surveys are evolving their techniques to measure and integrate audience estimates for digital platforms, particularly in respect of the more holistic solutions to integrate passively collected data. It is becomingly increasingly important to ensure audiences on mobile platforms, including apps, are included in estimates. In addition, some countries are developing ways to better reflect readership duplications between platforms in their published estimates.

- The number of surveys using online interviewing in part or total continues to rise.

- There is evidence of pressure on sample in some countries, with some surveys reducing sample size or opting for less expensive methods of obtaining sample, such as quota samples or access panel samples, though there are also exceptions where sample sizes has increased.

Surveys with major changes

A number of surveys have seen major changes, or will shortly re-launch. These are:

- In Austria the **MA Media Analyse** has introduced online interviewing in place of face-to-face. Participants are either recruited by telephone (RDD) to complete the questionnaire via a link or recruited at home (by quota sample) to complete the CAWI interview on the respondent's laptop, with support if necessary.

- In Canada there is a new single source **Canadian Print and Digital Audience Measurement** survey for all newsbrands and magazines, replacing the two previous separate surveys, NADbank for newsbrands and the Print Measurement Bureau (PMB) for magazines.   It will be an online survey with a sample of 36,000, adopting a brand- first approach.

- In Finland although newsbrands and magazines still have a single-source survey in the **Kansallinen Mediatutkimus (KMT)**, they now use different methodologies for their audience measurement. An online methodology is used for magazine measurement, while newsbrands have retained the CATI methodology previously used for both newsbrands and magazines.

- In Slovenia the **NRB** is a new CAWI/CAPI readership survey from Ipsos with a sample of 6,000.

- In New Zealand the **Roy Morgan Single Source** survey has changed from telephone/self-completion to an online methodology.

- In the United Kingdom the **Audience Measurement for Publishers (AMP)** survey will go into the field in 2017, run by a new joint industry measurement body PAMCo, which replaces NRS Ltd after over 60 years. This new survey will be carried out face-to-face, rather than online. Readership survey participants will be recruited to join a panel passively tracking their browsing on publishers' digital platforms across all devices. The survey will adopt a brand-first approach and is testing a specific issue readership measure for magazines.

Tenders are expected in the near future in Belgium and South Africa. In South Africa a new joint industry council, the Publisher Research Council (PRC) was set up in July 2015.

The evolution in publishing integrated digital and print audience estimates

The main development focus continues to be producing integrated digital and print audience estimates and keeping pace with the increasing number of platforms and devices used to access content, including mobile devices, apps, and access via social media and third-party platforms.

At a top-line level, providing publishers with a measure of total brand reach across all print and digital platforms is an important statement for marketing and strategic purposes. However, more is needed in order to have the potential to inform the planning process. The ability to carry out reach and frequency planning by individual platform is a potential asset, with the ability to analyse platforms in combination so that publishers can put together their packages and cross-platform sells.

The relevance of traditional reach and frequency metrics in the digital trading environment is often questioned, but without reach and frequency it is difficult for publishers to make the case for their multi-platform print and digital brands.

The majority of surveys in our review now include some measure of digital reading alongside and in combination with print readership estimates. The ways of doing this and the basis on which estimates are published are very various. By way of overview, there are three main approaches:

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

Below follows a review of each of these approaches, and recent developments in respect of the third approach.

Asking questions

Of the 103 general readership surveys included in the review, 62 ask questions about reading/browsing on digital platforms.

Where specific platforms are measured (rather than digital reading of the brand as a whole) pc websites are the most usual platform to be measured, but 21 surveys told us they specifically measure mobile platforms, and 28 measure digital editions.

The most likely scenario is for these estimates based on participant recall to be published direct at 'face-value', though sometimes they are used as an aid to data integration.

There are a number of issues with asking participants questions about their digital reading. It is difficult for participants to remember (or even know) the full scope of their digital activity, particularly occasional or one-off visits. Distinguishing between the different platforms a brand can be accessed on is particularly difficult, even when care is taken over wording and explanations. And if the questions are asked for many brands this risks overburdening the questionnaire.

However, an estimate based on recall may be seen as a starting point to have some information in the market on digital reading of publisher brands, alongside/in combination with the traditional print estimate.

Fusion, calibration etc with passive measures

In total, there are now 21 surveys using some form of data integration in order to report digital estimates collected separately by passive means in the same database as the print readership estimates. This may be a fusion/calibration with comScore, Nielsen or some other source of digital audience data. In some cases the passive measurement is carried out by the same organisation running the readership survey, e.g. the TGI Clicksteam data in the UK and China.

Table 1: Surveys integrating passively collected measures of digital reading/browsing

Australia	Roy Morgan Single Source	Calibrated to browser data from a panel of single-source participants
Australia	Emma	Fusion with Nielsen
China	China National Resident Survey (CNRS)	Clickstream data integrated
China	Media Atlas China	
China	China Marketing and Media Study (CMMS)	
Ecuador	Estudio Nacional de Lectoría	Calibrated
Finland	Kansallinen Mediatutkimus (KMT)	Calibrated to passive data
France	One Survey	Fusion
New Zealand	Nielsen Consumer & Media Insights (CMI)	Fusion
Norway	Magazine NRS	Passive measures integrated
Norway	Forbruker & Media (Consumer & Media)	Passive measures integrated
Norway	Consumer & Media: Target Group Index (TGI)	Passive measures integrated
Peru	Estudio Nacional de Lectoría	Calibrated to external data
Romania	SNA FOCUS (NRS)	Calibrated to passive external data
Sweden	ORVESTO Consumer	Passive measures integrated
Switzerland	MACH Basic	Calibrated to passive data/fusion
Thailand	Consumer Media View	
United Kingdom	Target Group Index (TGI)	TGI Clickstream data integrated
United Kingdom	JICREG (Joint Industry Committee for Regional Media Research)	Off survey technique
United Kingdom	National Readership Survey (NRS)	Fusion/calibration with comScore
USA	Survey of the American Consumer, GfK MRI	Fusion

If the source of the digital audience data is the official or quasi-official currency, this method avoids putting a competing set of digital audience estimates into the market. It also sidesteps the issues with recall data (though, of course, passive data are not without issues).

However, depending on the situation, this method can entail bolting very disparate datasets together, which have very different structures and linking information, as they were not designed with data integration in mind. A particular concern is the ability to reflect adequately the duplication of readership between print and digital platforms. In the case of fusion, even with good links, there will inevitably be some regression to the mean, and sample sizes may not be large. The difficulty of confidently representing duplication between platforms is compounded if there are different passive panels to measure different devices, e.g. separate pc, mobile and tablet panels, as then duplication between the devices will also not be directly observed. If duplication between platforms is not well represented, of course this will have implications for the veracity of the total brand reach estimate and reach and frequency planning outputs.

Passive measurement in more holistic solutions

We are now seeing more examples of measurement systems being developed in such a way as to facilitate data integration and improve the outputs, particularly with respect to understanding and reflecting duplication of readership between platforms.

Some examples from the PDRF 2015 review are:

- The **MACH Basic** 'Total Audience' report for a selection of Swiss publisher brands. When the new **MACH Basic** survey was launched three years ago, the methodology included downloading a cookie onto the pc used by those participants completing the survey by CAWI. The cookie data make it possible to calibrate NRS data to match external estimates of reading via browsers. The print and browser duplications are derived by observing the single-source behaviour of these readership survey participants. As the cookie data are only relevant to pcs, reading via mobile platforms is added in separately by means of a fusion with the external mobile measurement panel. In this case duplications between mobile platforms these must still be estimated from recall questions on the readership survey.

- The **One Survey** in France is carrying out a test placing cookies on the devices of participants from their Premium Survey who also complete a readership survey online. With agreement, cookies are placed on all the participant's devices in order to track reading passively. The objective is to measure print and digital duplications and provide a single source panel of reading across devices.

- The recruitment of a single-source panel to track visits to publishers' digital platforms is a key feature of the new **AMP** service planned in the United Kingdom, due to launch in 2017. Participants will be recruited at the time of the readership interview to have a light tracker app installed on all of their devices i.e. pcs, laptops, tablet and smart 'phones. It is not the intention to report digital platform estimates directly from this 5,000 strong panel and the AMP database will match ComScore's published estimates for publisher platforms. Instead, 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 likely we will see more examples of surveys setting up their own passive measurement tools, even if these are to strengthen and improve data integration, rather than directly report audience estimates.

Brand-first questionnaire designs

Another development noted by the PDRF 2015 review is the introduction of a brand-first approach for a number of surveys. This involves the initial 'screen-in' question being for all types of reading, i.e. in print or digital or both. Once reading of the brand as a whole has been established, different strategies are adopted to arrive at measures for print and digital specifically. Two examples of brand-first surveys already in the market are the GfK MRI Mediamark survey is the USA and the CIM survey in Belgium. These are now joined by the following:

- The new **Canadian Print and Digital Audience Measurement** has adopted a brand-first approach. Reading of a brand is determined by the following question: "Have you read or looked into this publication in the past year (in the case of magazines). That is…any printed issue or digital content accessed through the website or other content posted through apps, on other websites, social media or e-newsletters?

- In the Netherlands in January 2015 the **NOM** questionnaire was redesigned to introduce a "brand first" approach. The questionnaire starts with a platform screen question (i.e. reading the brand on paper / computer / smartphone / tablet / e-reader in the past 12 months). This screen-in question determines whether a respondent gets asked the 12 month filter questions for brands in print only or for a combination of print and digital.

- In New Zealand, **Nielsen Consumer & Media Insights (CMI)** is testing a brand first approach, including alternate question formats for non-print platforms. Results are pending.

- In the United Kingdom, the new **AMP** service will adopt a brand-first approach.

Reporting digital editions

The measurement and inclusion of digital editions (i.e. e-papers and PDF formats) was mentioned very specifically by a number of contributors. Some surveys are now publishing audience estimates for digital editions in combination with the print measurement (i.e. not as separate platforms). Individual survey news is as follows:

- Ecuador **- Estudio Nacional De Lectoria.** This survey now is reporting on newspaper digital editions.
- Finland **–** The **Kansallinen Mediatutkimus (KMT)** is giving consideration to adding the audiences for digital editions directly to the print audiences, at least for newsbrands.
- France **–** In 2014, the **One Survey** launched global print indicator combining paper and PDF format.
- Italy **–** Since 2014, the **Audipress** survey has included digital editions.
- Norway **-** In July 2015 **Forbruker & Media (Consumer & Media)** started to measure all e-papers for newsbrands.
- Spain **–** The **Estudio General de Medios (EGM)** is now measuring digital editions for all print brands.
- Switzerland **– MACH BASIC.** Reading of digital editions is now added directly to the print estimates, without separation.

Interview mode and the rise of online interviewing

A common theme to most of the surveys that are relaunching or undergoing major change is the adoption of CAWI (Computer Assisted Web Interviewing).

The number of surveys using CAWI has increased from 15 in 2013 to 23 in 2015. There are now nine surveys conducted entirely or almost entirely by CAWI – including five which are new additions to this interview mode in the last two years namely the Austrian **MA Media Analyse**, the **Canadian Print and Digital Audience Measurement**, the Slovenian **NRB**, the Slovenian **Target Group Index (TGI)** and, in New Zealand, **Roy Morgan Single Source**.

As usual, it is worth noting that although there has been a shift towards CAWI, the majority of surveys continue to use a personal interview mode, either pen and paper or electronically assisted. Some of the surveys which use CAWI still use other interview modes for the majority of their sample.

By way of an overview, the methodologies used for the 103 national readership surveys are summarised in Table 2.

Table 2: Overview of mode of interview

	Surveys
Personal - pen and paper	42
Personal - CASI, CAPI, DS-CAPI, HAPI, TAPI, mobile 'phone	18
Self-completion – paper	7
Telephone	9
Mixed methodology involving CAWI:	
• Largely CAWI (80%+ interviews)	9
• Partial CAWI (40-79% of interviews)	4
• Some CAWI (less than 40% of interviews)	10
Mixed methodology without CAWI	4

There is a considerable variety to the ways in which sample is taken for CAWI interviewing. In some cases the sample is recruited by telephone or in-home, often by random methods, and online is simply the interview mode. In other cases the sample is recruited directly from an online panel.

There is also considerable variation in the proportion of interviews taken online relative to other interview modes. Surveys which are in part conducted by CAWI tend to be increasing the proportion of interviews taken online. The British **TGI**, for instance, has increased its proportion of online interviews from 43% to 70% since the PDRF review in 2013.

Particularly notable is the Finnish survey **KMT** which now uses two different interview modes for the newspaper and magazine readership questions: CATI for the newspaper questions and CAWI for the magazine questions. After testing, the magazine publishers decided to use CAWI because it enabled logos and front covers to be shown.

An overview of the surveys using CAWI is shown in Table 3 below.

Table 3: Use of CAWI

	Survey	Methodology	Developments
80%+ CAWI:			
Austria	MA Media Analyse	CAWI – Recruited by RDD or at home by quota	CAWI introduced in 2014
Canada	Canadian Print and Digital Measurement	CAWI – Recruited by RDD	New survey
Netherlands	NOM Print Monitor	100% CAWI – 40% random probability completed online or with an interviewer present and 60% access panel	
New Zealand	Roy Morgan Single Source	CAWI	New to CAWI
Slovenia	Target Group Index (TGI)		New to CAWI
Slovenia	NRB	CAWI/CAPI (proportion unknown)	New to CAWI
Australia	Emma	90% CAWI, 10% Personal (CAPI on i-pad)	
France	One Survey	87% CAWI, 13% DS-CAPI	
Norway	Magazine NRS	80% CAWI (online access panel), 20% paper self-completion	
40-79% CAWI:			
United Kingdom	Target Group Index (TGI)	70% CAWI (some from online access panel), 30% paper self-completion	CAWI has increased from 43% to 70%
Norway	Consumer & Media: Target Group Index (TGI)	60% CAWI, 40% paper self-completion	
Switzerland	MACH Basic	45% CAWI, 55% telephone	
China	China National Resident Survey (CNRS)	40% CAWI, 60% personal	CAWI has increased from 20% to 40%
< 40% CAWI:			
China	Media Atlas China	Personal, PCLT, CAWI, Telephone	
Czech Republic	Market & Media & Lifestyle (TGI)	Personal (CAPI), 25% CAWI	
Finland	Kansallinen Mediatutkimus (KMT)	Magazine readership interviews by CAWI (newspaper readership by CATI)	Different approach introduced for magazines
Hong Kong	Nielsen Media Index	Personal, CAWI	
Latvia	NRS	CAPI/CASI, 20% CAWI	New to summary
Luxembourg	Etude Plurimedia	CATI, 25% CAWI (online access panel)	New to CAWI
Mexico	Estudio General de Medios (EGM)	Personal, CAWI	
Portugal	Bareme-Imprensa	Telephone, CAWI	
Russia	National Readership Survey	Telephone, 10-20% CAWI	
Taiwan	Nielsen Media Index	Personal, CAWI	

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. Three surveys currently use Specific Issue Reading as the basis of an AIR measure for magazines (**NOM** in the Netherlands, **Magascene** in Japan, and **emma** in Australia), and the new **AMP** survey in the UK is testing the introduction of a similar approach in 2016. No surveys use Through the Book.

Title prompts

Publications are prompted as follows:

	Surveys
Grouped title mastheads	10
Single title mastheads	61
Magazine covers	7
No mastheads (typescript or telephone)	23
Spontaneous day after recall	2
Not stated	2

Of the surveys using mastheads and covers as prompts, 38 explicitly state that they use colour.

The screen-in question

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

	Surveys
Past/last 12 months	30
Past year	5
Past 6 months	6
'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	41

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 15 surveys the options are hidden.

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

The frequency question

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

	Surveys
Numeric	74
Verbal	5
Verbal with some numeric explanation	13
Mixed numeric/verbal	4
Frequency not used/ or specific issue	7

Source of copy and readership engagement questions

Of the 103 surveys, the majority (78) include quality of reading/engagement questions. Source of copy is the most popular choice of question, followed by time spent reading.

Country by country developments

Afghanistan - Ipsos

Ipsos plan to launch a readership study including questions on products and services in Afghanistan in the autumn of 2015. The previous study was last conducted in 2012. For the new study there will be a sample of 2,000 recruited face-to-face.

The questionnaire includes filter questions (past three months for dailies, past six months for weeklies and past 12 months for monthlies), recency and frequency questions. There are also source of copy questions, but no other engagement questions.

Australia – emma

A number of tests have been carried out to test the impact of various innovations:
- 2 minute reading filter
- 12 month group filter for magazines by genre
- Last time read previous to last 7 days (to calculate frequency for newspaper reading)
- Optimum number of covers to be used to measure magazines
- The impact of adding a "recency" question as well as covers
- Testing of fusion with online measurement
- Testing of passive, on-device measurement of mobile and app usage with a separate panel.

Austria – MA 2014 Media Analyse

The methodology of the MA changed in 2014. Face to face interviewing was replaced with CAWI. Respondents are recruited by telephone (RDD) to complete the questionnaire via a link or recruited at home (by quota sample) to complete the CAWI interview on the respondent's laptop, with support if necessary.

Belgium - CIM

In Belgium it is a time of consideration and change, as the Belgian stakeholders work through their requirements for the next tender.

Canada – Canadian Print and Digital Audience Measurement

In Canada there will a new single source measurement survey for all newsbrands and magazines, replacing the two previous separate surveys, NADbank for newsbrands and the Print Measurement Bureau (PMB) for magazines. At the time of the report the new survey was at the stage of a pilot test of new methodology before national expansion.

The survey will comprise 36,000 interviews per annum with adults aged 12+. The sample is recruited by telephone (modified random digit dialling). All interviews are completed online.

The questionnaire uses a brand-first approach (i.e. all reading in the last three/12 months is screened-in, be it in digital or print). The readership questions are as follows:

- Magazines: Past 12 months filter by brand, last read by platform, issues read or days accessed content (dependent on platform)
- Newsbrands: Past three months filter by brand, last read weekday by platform, number of weekday issues read or days accessed content dependent on platform, last read Saturday/Sunday by platform, number of Saturday/Sunday issues read or days accessed content dependent on platform. (Questions are asked separately for each of Saturday and/or Sunday, depending on the publishing schedule.)

For magazines recent reading model estimates average issue readership by accepting all readers fall into the first time scale point and then a proportion of those fall into the second scale point. The proportion applied to the second scale point is an approximation that, when applied to the qualifying period, will closely estimate the publication interval. This model was tested but not adopted for the newsbrands.

Please see the paper given at PDRF London 2015 outlining this new survey.

China - China National Resident Survey (CNRS)

CTR and Kantar Media have launched CNRS-Clickstream. This is a major new study enabling brands and complex consumer targets to be analysed for the first time against actual online consumer behaviour. Using CNRS-Clickstream, engagement of target consumer groups with individual websites can be evaluated by looking at a variety of metrics, including average number of visits, average time spent on site and average page views over a specific time period.

The proportion of interviews conducted by CAWI has risen from 20% to 40% over the last two years.

China – China Marketing and Media Study (CMMS)

CMMS has extended the number of cities covered from 46 to 62 and is the only syndicated study to cover rural cities.

From 2014, CMMS data are fused with TV ratings data. The plan is to fuse with Internet data in the future.

Columbia - TGI

The questionnaire has some new questions about habits and the newspaper screen-in hurdle is now 30 days rather than 3 months. Reporting is now twice a year rather than once a year.

Costa Rica – Estudio Multimedios

The sample methodology is now by controlled quotas and there has been a questionnaire homogenization with the Multimedios survey in Panama.

Czech Republic – Media Projekt

The Media Projekt has introduced a quota sample and increased the sample from 2,800 to 3,500.

Czech Republic – Market & Media & Lifestyle - TGI

The proportion of interviews taken by CAWI has increased from 17% to 25% since the last report.

Ecuador - Estudio Nacional De Lectoria

The survey is now conducted on a tablet computer and colour mastheads have replaced black and white.

The survey is reporting on newsbrands digital editions. Reporting is now monthly, rather than quarterly as previously.

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

It has been a time of change for Finland. While newsbrands and magazines are still in a single-source solution, there have been changes to the methodology used to measure magazines. A CAWI methodology is now used for magazine measurement, while newsbrands have retained the CATI methodology previously used for both newsbrands and magazines. After testing CAWI, the newsbrands decided they wanted to stay with a CATI methodology, as it gave them a bigger sample which enabled monthly reporting and for more of the local newsbrands to be included. The magazines, on the other hand, preferred CAWI, as they judged the method of prompting with a logo and front cover gave them a more correct estimate of readership.

The new methodology went live in January 2015 with 26,000 CATI interviews for newsbrands and 10,000 CAWI interviews for magazines (recruited by CATI). Newsbrands have estimates reported monthly, and magazines report twice a year.

The difference in methodology has also led to very different sequence of readership question magazines and newsbrands:

- Newsbrands: 12-month general filter question; time-related filter question; frequency; recency; whether subscribe
- Magazines (CAWI): open recency (when was the last time you read...); frequency; whether subscribe.

Consideration is being given to adding the audiences for digital editions directly to the print audiences, at least for newsbrands.

France – One Survey

In 2014, the One Survey launched global print indicator combining paper and PDF format.

The proportion of interviews taken by CAWI has risen from 80% to 87%.

Germany - Media-Analyse ma 2013 Pressemedien

The Mediascan data have been launched alongside the main currency after seven years of testing. The objective of the Mediascan data is to provide:

- A measure of ad page exposures (previously this had been derived from copy tests for selected magazines, and was sometimes criticised as being biased towards regular readers)
- Time-based performance metrics.

The data are based on a separate panel of 2,000 respondents recruited by quota who are given an electronic device to scan their publications every time they read. This collects passively observed data on time spent reading, number of pick-ups, accumulation of readership over time etc. The task is not altogether passive as panellists have to scan, press a button at the end of the session, and register what proportion of pages have been read.

These data have yielded new indices of ad page exposure for magazines and newsbrands. Please see the paper given at PDRF London 2015 on this topic.

Greece BARI - National Readership Survey

The universe has been extended from adults aged 13-70 to adults aged 13-74.

India – Target Group Index

The sample size is now 40,000 and reporting is biannual.

Italy – Audipress

Since 2014 the Audipress survey has included digital editions.

Latvia – NRS

The Latvian NRS is new to the Summary of Surveys. It has a 12,000 sample and is conducted largely by CAPI/CASI (80%) with the remaining 20% of interviews taken by CAWI. More details can be found in the online summary.

Luxembourg - Etude Plurimedia

The Etude Plurimedia has introduced a mixed methodology by adding 1,000 online access panel interviews to the existing 3,000 CATI interviews per annum.

Mexico - Estudio General de Medios (EGM)

The EGM has introduced a 24-hour past day eDiary. Some interviews are now conducted online.

Netherlands - NOM

In January 2015 the questionnaire was redesigned to introduce a "brand first" approach. The questionnaire starts with a platform screen question (reading a newsbrands and / or magazine on paper / computer / smartphone / tablet / e-reader in the past 12 months). This platform screen-in question determines whether a respondent gets asked the brand screen-in questions for print only or for a combination of print / digital. The Specific Issue Readership question, which is the basis for AIR, has not been changed. Please see the paper given at PDRF London 2015 on this topic.

New Zealand – Roy Morgan

The survey has changed to an online methodology. Previously interviews were conducted by telephone/self-completion, with the readership questions in the self-completion section. The sample comprises 8,000 interviews.

New Zealand - Nielsen Consumer & Media Insights (CMI)

Major changes are in progress for the CMI, with tests into online completion of the survey. An online pilot was conducted parallel to Q1 2015 fieldwork to test the effect of 25% of sample completing via an online survey. Of this online sample 25% were recruited via CATI, and 75% recruited were recruited from an online panel. The results are pending.

The self-completion booklet of product/marketing questions which is currently picked up one week after the interview is also moving to online in module format, with the modules fused into the core CMI database.

In addition the CMI is testing a brand first approach, including alternate question formats for non-print platforms. Again results are pending.

Finally, the two minute filter of any reading has been changed to a one minute filter.

Norway - Forbruker & Media (Consumer & Media)

In July 2015 this survey started to measure all e-papers (PDF) for newsbrands. There will be a paper on this issue at PDRF in London 2015.

Panama - Estudio Multimedios

This survey has moved to a quota sample.

Peru - Estudio Nacional de Lectoria

This questionnaire is now administered by tablet using MarkTab software. Previously a mobile 'phone was used.

Poland - PBC

The PBC sample size has reduced from 42,000 to 20,000. There is no longer a separate self-completion questionnaire for marketing data.

Romania – SNA Focus

The SNA Focus has begun publishing "total brand" audience estimates. To do this the printed title, the website with the same brand and, if applicable, the Facebook page of the brand, are included, along with any other "brand extension".

In 2015, for the first time, SNA FOCUS will measure audiences for the entire population aged 14 - 74, not just for the urban areas. This will be accompanied with large increase in sample from 10,000 to 16,000.

Russia – National Readership Survey

The share of interviews conducted online in Moscow and St. Petersburg has increased to 20% of the total sample. In other cities the proportion of interviews conducted online is 10%.

Slovenia – NRB

There is a new CAWI/CAPI readership survey from Ipsos with a sample of 6,000.

Slovenia – Target Group Index

The data collection methodology is now CAWI.

South Africa - All Media and Product Study (AMPS)

Print and digital measurement in South Africa will see significant change in the near future.

South Africa's four largest publishers (Caxton, Independent Media, Media24 and Times Media Group) formed a new joint industry council, the Publisher Research Council (PRC), in July 2015. Other print and digital publishers will be welcome to join.

The role of the PRC will be to commission and coordinate industry research. There is expected to be a tender in 2016. The PRC's launch statement expressed the intent to: "Produce more relevant measures than just the traditional readership metrics of AMPS", including multi-platform engagement.

Spain – Estudio General de Medios (EGM)

The EGM is now measuring digital editions for all print brands.

Switzerland – MACH BASIC

The MACH BASIC survey has launched reporting of digital audiences for a selection of brands, via the 'Total Audience' report. The readership survey participants completing the interview via CAWI have a cookie downloaded onto the pc they complete the readership survey on. This makes it possible to calibrate NRS data to match external estimates of reading via browsers. The print and browser duplications are derived by observing the single-source behaviour of these readership survey participants. Reading via mobile platforms is added in separately by means of a fusion with the external mobile

measurement panel. In this case duplications between mobile platforms are estimated from recall questions on the readership survey.

The proportion of interviews conducted by CAWI has increased slightly to 45% of the sample.

Reading of digital editions is now added directly to the print estimates, without separation.

Turkey – National Readership Survey (BIAK)

The interview mode is now CAPI and the sample has dropped from 48,000 to 36,000.

United Kingdom - JICREG

JICREG is moving towards releasing new readership models based on NRS data, and there will be a paper on this at the PDRF London 2015.

United Kingdom – NRS

NRS PADD (Print and Digital Data) has included mobile audience estimates for a selection of brands since the release of Quarter 2 2014 data. These estimates are calibrated to match comScore mobile (i.e.'phone and tablet) audience estimates for the brands in question. Estimates for pc website audiences have been reported in the NRS PADD database since 2012, and are included by means of a fusion of NRS with the comScore pc panel.

The Publishers Audience Measurement Company (PAMCo) will replace National Readership Surveys Ltd in 2016. A new measurement system for publisher audiences will be launched in 2017, with the name Audience Measurement for Publishers (AMP). Please see the paper given at PDRF London 2015 on the outline methodology and outputs of AMP.

United Kingdom – TGI

The proportion of interviews completed online has risen from 43% to 70% in the last two years.

Vietnam - Media Habits Survey (MHS)

From 2013 monthly sample size in each of the four major cities has been doubled, and reporting is now on samples accumulated over three consecutive months (previously it was six).

In 2014 MHS participants in four major cities were re-contacted for an interview about their product consumption. These consumption data are then fused with full year of MHS data to produce a single-source TGI.