

# Global trends in Print and Digital readership measurement

NICE, FRANCE: Ask Afrika shares insights from the recent International Print and Digital Research Forum Symposium in Nice, France.

Globally there is a technological disruption in print readership with an increase in digital readership. However, the total time spent consuming all media has remained static despite the significant increase in online consumption. This can to a large degree be attributed to multi-tasking. This gives a positive outlook as in fact more media overall is being consumed.



Nice, from the air. (Image: [Tab59](#), via Wikimedia Commons)

Out of the total global population - roughly 7 billion in 2012 - about 35-40% read daily newspapers in print, 7% were reading newspapers in print and online and 1% were reading newspapers online only. Global device penetration per capita is high, one in every five people in the world own a smartphone and one in every seventeen own a tablet.

In South Africa (SA) in May 2012 there were 532,000 tablets, this had increased to 1.5 million in July 2013 and is predicted to be up to 2 million by July 2014. The number of internet users in SA is increasing. The forecast for 2017 is 32 million mobile internet connections by 2017 and 2 million fixed broadband connections. This translates as 60% of the SA population being online which compares favourably to

the Scandinavian market.

Measurement of digital is not comprehensive and the long tail of online media consumption is fragmented, there is little or no measurement and no agreement on metrics. Media owners increasingly want the long tail measured in an effort to curb declining revenue. Online reading adds significant incremental reach and major news providers are experimenting with various pay strategies and paywall options.

Ask Afrika's Strategic Innovations Director, Grant Robertson shared these insights at a high profile, exclusive media breakfast in November from the International Print and Digital Research Forum Symposium, that he attended in Nice, France, in October. Here, audience measurement experts from around the world gathered to share their latest research on readership. There were over 55 papers and 1,000 pages of documentation on a range of eclectic topics presented at the symposium.

Robertson explored global findings regarding the shift in readership behaviour towards digital platforms and developments in research methodologies to measure these audiences. Global print and digital readership trends were discussed as well as the complex world of cross platform audience measurement. He looked at print magazine ROI and reading apps in a mobile environment. New sampling strategies and dual data collection were discussed as well as international media research case studies.

Ask Afrika has extensive experience in print media audience measurement. It has experience in revealing underlying motivational/ engagement trends as with Magazine Moments and social consciousness. They have done various readership studies where they have measured readership on titles, for example the recent Compass24 (commissioned by Ads24) which measures readership numbers, demographics and consumer behaviour for the country-wide footprint of Media24's 76 local titles. The company has also conducted product research, where their research has informed the product direction of titles. On a global level researchers have realised that audience response is more important than audience numbers and metrics are paramount.

At the symposium in Nice, Philip Napoli from Fordham University presented a paper entitled, 'Towards a model of audience evolution: new technologies and the transformation of media audiences', the gist of which is explained in the model shown

below.



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When asked about the current AMPS survey, local media professionals identified that the biggest area that needs attention is the digital space. This includes online, mobile, social media, twitter, and other related platforms. Users require more up in-depth, up-to-date and relevant data. Ask Afrika has been exploring ways to try and provide solutions to industry, they are launching their Digital Barometer survey to measure detailed digital trends, in early 2014, and in addition they have been investigating the best of what international models have to offer.

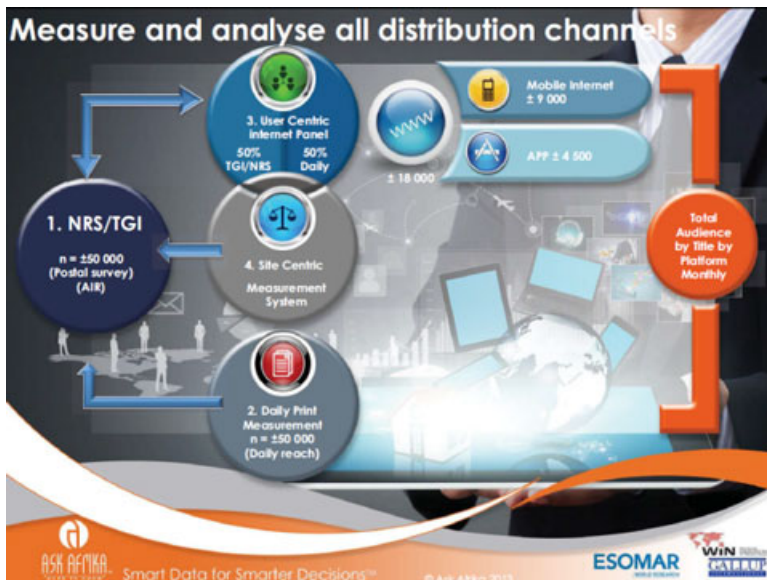
Robertson elaborated on three international case studies in readership measurement: Case study 1 - Swedish calibration method; Case study 2 - Belgium survey based approach and Case study 3 - UK time and fusion approach. He then elaborated on the tablet magazine in the USA.

### Case Study 1 - Sweden

Sweden has had a fall in print and rise in digital and uses a hybrid measurement methodology. TGi and NRS conduct various surveys. A day survey, with questions from TGi, measures average issue readership (AIR), reader accumulation and daily reach - these are retained across data sets. A TGi panel survey measures daily reach, in which results for each site by hour, broad day part and week and as reported by the internet panel, with control data being retained. The validation of the research is the end result of calibration with figures that match currency and figures that maintain profiles and duplications.

In Sweden the notion of a total reach figure or a brand footprint has been deemed to be of such strategic importance that dailies have started to deliver a Total figure every month to show advertisers their total footprint.

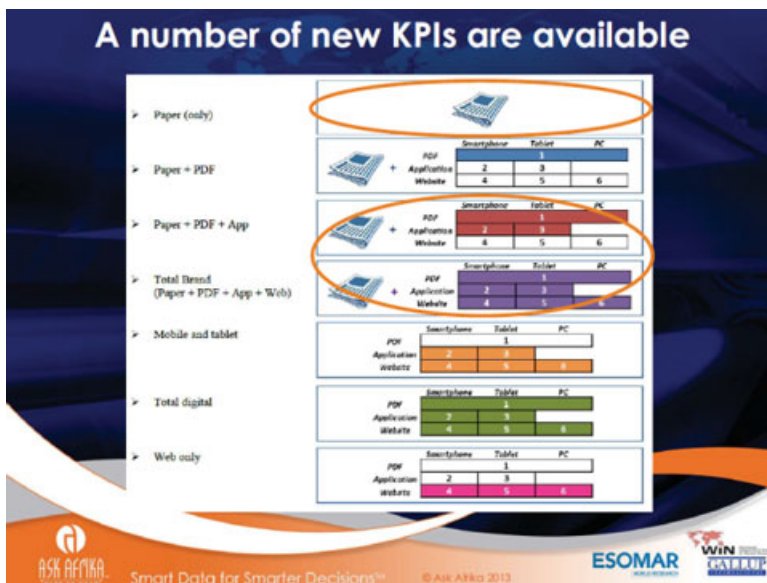
"New times call for both new business models and the transformation of existing models such as the advertising model. If print is to have a successful future the competence and research for selling cross media packages will have to be part of the armoury," said Robertson.



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## Case Study 2 - Belgium

In Belgium there is an e-evolutioning Press Audience Measurement and research questions are hybrid, brand first, or print first. In this pen and paper survey with no fusion, respondents are asked whether they read print, digital and both and after that all print questions are asked and then all digital questions for each category and incremental reach is reported on. There has been a decline in traditional print figures.



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## Case Study 3 - UK

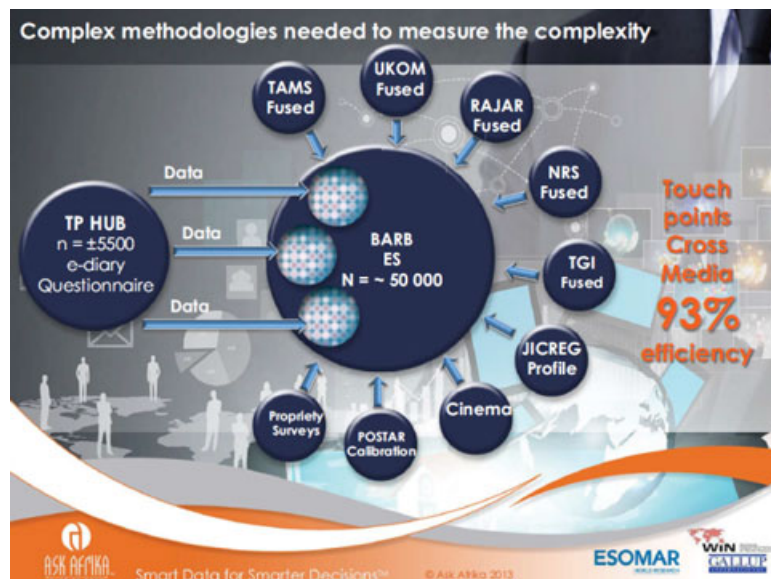
The UK case study showed that more media channels are being used in winning campaigns. Touchpoints is the central research methodology and allows for an analysis of multi-tasking and accurately measures the way people consume in a multi-platform environment. The efficiency rate is 93% and this methodology uses TGI better than any data set. The TouchPoints e.diary allows for the analysis of when newspapers are read throughout the day and what life activities readers are also doing in the same half hour. For example, they can compare the general life activities of Guardian readers (quality sector) to readers of the Sun (tabloid sector). It allows for customisation of content and platform throughout the day.

In the UK the time people spent consuming all media continues to grow. Traditional media are more or less maintaining their average daily hours of use. Internet use is surging ahead showing a 241% growth between 2006 and 2012 and people are absorbing this overall increase in use by media multi-tasking. In 2012, of all the half hours spent consuming media, 87%

involved consuming two or more media. There is a decline in print, radio, TV, and stable growth in digital across all media.

Whilst the audiences to publications' print platforms continue to dominate, they are in a steady decline. In the four years between 2008 and 2012, the daily reach of printed newspapers fell from 77% to 58% of all adults. In 2008, the online/ web versions of the papers added an extra 3% in reach, taking the total to 80% reach. By 2012 online and app versions were adding back another 6% of reach, restoring overall reach of newspapers to 64%, this is still down overall but much healthier than the print only figure.

For newspapers, the digital gains are greatest for the quality sector where an extra 4.4 percentage points (i.e. +20%) is added to the print platform reach. Qualities also gain more from web versions compared to app versions. There is a willingness to consume newspapers on more than one platform. As would be expected the websites and apps deliver to much younger audiences for all the newspaper sectors. For the tabloids and qualities these digital platforms are far more male biased whilst the mid-markets, are far more female biased.



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The company is able to add a Touchpoints diary to TGI for more accurate time of day audience measurement as well as design the Establishment Survey (ES) which acts as a chassis for the media audience research. It provides the commonality in measurement metrics for inter-media comparison as a single robust survey into which all the others link. It seems that the way forwards is through currency expansion rather than currency extension. Complex cross-platform metrics need to be available to all media. The quality of big data must not be ignored and this is something for which the company says it has the capacity.

## The Tablet Magazine in the USA

The USA tablet magazine advertising industry shows the opportunity of what is possible. There is significant growth in the readership of digital editions, however print still dominates magazine reading. The digital reader is more engaged and read more when out of home and it is more sociable. Certain key questions resound throughout the industry - should advertisers be investing dollars to place ads in digital editions of print brands? Are digital print ads effective? Is there a difference between the effectiveness of content in print versus digital representations of print brands? Are there best practices for advertising in digital editions of print brands? What are the opportunities for advertisers in digital editions?

Very little is known about App reading behaviour worldwide and this is an area that needs attention. Simmons TGI National Consumer Survey used to recruit panellists to install passive tracking software on their PCs, smartphones, and tablets and the results of the Amazon Kindle app are reported on.

## About Ask Afrika:

Over a period of almost two decades, [Ask Afrika](#) has grown to be what is reputed to be the largest independent South African market research company. The company focuses on local relevance, benchmarked against the global context. Ask Afrika is a member of WIN/Gallup International and ESOMAR. Apart from their large South African footprint, the company also operates in a dozen African continental territories.

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