Press Release

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An international perspective on shifting research methodologies in readership measurement

Ask Afrika's shares insights from the recent International Print and Digital Research Forum Symposium in Nice, France

International high level trends for print and digital media showed that print remains a challenging business. The time spent consuming media online is high and digital readership is increasingly being measured in the major audience surveys. More media owners are now reporting on total audiences regularly. Exposure is still important, but from a cross platform perspective. As time goes on, more print audience measurement will move over to the hybrid survey design with fusion - the currency expansion mode which integrates survey and behavioural data. The search for 'engagement' metrics is on, especially for those media far down the long tail. 70% of the 107 major global audience surveys measure digital reading in some form. However when it comes to survey design more questions than answers are raised.

The forecast on media revenue growth rates for 2013-2015 revealed that globally newspapers and magazines were under pressure, but South Africa (SA) by comparison shows favourable rates. The total global magazine and newspaper revenue growth rate is flat, the only growth is in digital circulation and digital advertising. Total SA magazine revenue is growing, but circulation revenue is growing faster than ad revenue. Total SA newspaper revenue is growing, here too ad revenue remains crucial and digital revenue will contribute.

The global magazine growth rate is 0.3% and for SA magazines it is 6.6%; while for global newspapers it is 0% and for SA newspapers it is 5.2%. Other South African media growth rates in comparison to print are: television 5.5%, radio 8.8%, Out-of-Home (OOH) 7.2% and cinema 7.7%.

Ask Afrika's Strategic Innovations Director, Grant Robertson shared these insights at a high profile, exclusive media breakfast this morning from the *International Print and Digital Research Forum Symposium*, that he attended in Nice, France, in October, where audience measurement experts from around the world gathered to share their latest research on readership. There were over 55 papers and 1000 pages of documentation on a range of eclectic topics presented at the symposium.

Robertson explained that we live in a complex cross platform world and investigated currency extension and currency expansion. He looked at what this means for the way we think about, plan and produce readership data.

Roberson reported that, "There will be a greater role for data integration and modelling. So we need to get over our aversion to fusion in all its forms. We'll also need to invest in the skills to do it well. We will need faster and more frequent data publication as digital access grows. That means automating systems and investing in databases, interfaces and analytic tools that are able to deal with large volumes of data and dynamic data integration.'

"We need an industry debate on common metrics across platforms and devices. That may mean losing some of our current (sacred?) metrics like average issue readership (AIR) - in favour of reach, time, GRPs. We also need agreed standards on the quality of the "big data" we use.'

"Finally, but this may be more challenging than any other requirement - we need increased collaboration between industry currencies. We will still need some form of robust single-source, single medium currencies, if only to act as hubs for the integration with behavioural data. But as media boundaries dissolve even further, it will be important for all currencies to work together to avoid duplication and gaps."

The landscape that was explored included: Reading on Tablets; Reading on Apps; Data fusion; Advertising effectiveness; Alternative measures to GRP; Cross media consumption; Methodology; Viewability; Niche markets (Affluent); Web measurement standards; Trends in audience measurements; Reach And frequency models for digital; Social networks and Print wear out.

Robertson said, "*The 2013 Latest Development in Worldwide Audience Research* report covers 107 general population readership surveys in 81 different countries, 58 specialist audience surveys, e.g. businessmen, children, specific issue readership etc. 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.'

"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. This however requires statistical sophistication."

Andrea Rademeyer CEO of *Ask Afrika* and Africa Chair of *WIN/Gallup International* commented, "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. 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 ask both questions and carry out fusions/calibrations, using the data collected within the questionnaire to inform the process.'

"In 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. *Ask Afrika* owns the local *TGi* license and is perfectly positioned to establish new integrated, collaborative audience measurement research methodologies in SA."

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About Ask Afrika:

Over a period of almost two decades, Ask Afrika has grown 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, Ask Afrika also operates in a dozen African continental territories.

Ask Afrika is well known for delivering strategic and large scale field projects and for creating benchmarks for industry. With regards to service excellence Ask Afrika is the preferred research partner across industries to co-craft customer service strategies through meaningful research methodologies across the value chain and customer service touch points.

Their exclusive product suite includes the Ask Afrika Orange Index®, Trust Barometer™, Radio Moods™, TGI Icon Brands and TGI (the Target Group Index). Ask Afrika pride themselves on their exceptional service delivery and they have offices based in Pretoria, Stellenbosch and Austria. For more information please visit the website: www.askafrika.co.za .

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