



Print audience measurement in The Netherlands: what the market wants

Bucharest, 26 March 2013



Today's topics

- The position of print in The Netherlands
- The role of NOM as print JIC
- Preserving the currency for print
- What the market wants
- Key words: innovation and collaboration!



Advertising Expenditures (gross) in The Netherlands

x 1.000 Euro	2010	2011	2012	Index 2012/2011
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l otal expenditures	6.255.414	6.315.565	6.120.029	
	3.337.940	3.415.317	3.178.556	93
Newspapers	931.103	878.242	913.807	104
Radio	570.323	588.661	597.654	102
Non Direct Mail	552.853	509.180	525.716	103
Magazines	355.802	365.206	331.225	91
Out Of Home	307.440	359.609	385.816	107
Trade Magazines	146.152	144.185	138.261	96
Sponsored Magazines	40.356	39.452	38.449	97
Cinema	13.445	15.713	10.545	67

Internet		450.946	



Source: Nielsen

The Netherlands: print is still important

 Groos advertising expenditures (share in %) in The Netherlands 2010-2012 (source: Nielsen)





National Readership Survey NOM

- NOM (Nationaal Onderzoek Multimedia): Joint Industry Committee (JIC)
- Long tradition from 1962 a kind of syndicated readership survey for newspapers and magazines
- JIC is the best organisational form for audience research





The role of NOM

- The role of NOM:
 - Deliver / preserve the *currency* for readership of newspapers and magazines - objective and transparant → trusted and respected by the market
 - Listen to the needs of the (changing) market and act upon them
 - Drive innovation in audience research
- Why / for whom?
 - Advertising industry: for mediaplanning, buying and selling
 - Media owners: for marketing and editorial / programming needs





Deliver / preserve the currency

for readership of newspapers and magazines







NOM basic surveys

- **NOM Print Monitor** Readership of 180 newspapers (national, regional, free) and magazines, other media on aggregated level n=22.000 per year Method: CAWI Mixed mode sample: random sample + access panel AIR based on Specific Issue Readersip (SIR) Research contractor: Intomart GfK
- NOM Target Monitor
 - Single source Consumer characteristics n=12.000 per year

NOM Print & **Target Monitor** n=22.000



Innovation in measurement

- In 2007 new method for measuring Average Issue Readership was introduced: Specific Issue Readership (SIR)
- Revival of the old Through The Book, but adapted to electronic / internet possibilities (visuals, up-to-date questionnaire)
- Possible because of high penetration of internet in The Netherlands (2012: 92% has internet at home)
- Lots of new types of data:
 - Readership of daily editions of newspapers
 - Accumulation of readership over time



How do we measure readership?



nationaal onderzoek multimedia

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Specific Issue Readership for magazines

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Specific Issue Readership for newspapers

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New types of data: readership of daily editions of newspapers



multimedia

New types of data: accumulation of readership

Recency method

The **model** uses two data points, AIR and readership after 1 publication interval. The model is the same for all publications.

SIR data

Readership is **measured** per publication interval. There are 6 data points per publication.



Accumulation of readership for magazines: examples







What the market wants







The needs of advertisers and media-owners

Cross media data / comparison







• Reading on different platforms



Advertising reach

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1.Cross media data / comparison



 From 2009 on: fusion of readership survey NOM and internet survey STIR





Cross media data / comparison (2)

- In 2013: time budget survey for media (Media Time)
- In 2014: fusion of 4 media currency surveys via the hub of Media Time into one multimedia database
- Collaboration: joint project of four JIC's (TV, radio, internet, print) and Government bureau for social studies
- Joint Technical Committee and financing





2. Reading on different platforms

- First step in 2011: follow the penetration of reading on digital platforms
- Questions at aggregated level in NOM Print Monitor and in the establishment survey (from January 2011)









Digital reading: reads a newspaper on....





Digital reading: reads a magazine on....



Reading on different platforms

- 2013: test with measuring reading on digital platforms at a title level
- At the same time we are studying possible passive measurement methods for reading on digital platforms (tablet, smartphone) – possible collaboration with STIR



3. Advertising reach in newspapers and magazines

- In 2010 advertisers and agencies stated that all the media should be measured at the same level: advertising reach
- Advertising reach = Opportunity To See Advertising
- NOM takes a challenge!





Opportunity To See Advertising (OTSA)

- 2011:
- Can we build a prediction model for advertising reach of newspapers and magazines which can then be implemented in the currency readership survey and thus used dor print media planning?
- Tender Opportunity To See Advertising in newspapers and magazines: appointed to Intomart GfK
- 2012:
- Separate study in which advertising reach is measured for a selection of newspapers and magazines, together with many background variables which can be used in the prediction model



OTSA study

- 18 titles X 3 issues X 5 advertisements x 150 respondents = 40.000 cells
- Background variables:
 - Respondent characteristics (socio demo's)
 - Title characteristics (nr. of pages, position in the title etc.)
 - Relation title : reader (reading frequency, nr. of pick-ups, reading time etc.)
 - Advertisment characteristics (product group, use of colour, type of adv.)







OTSA study

- 2013:
- ✓ Building a prediction model for newspapers and magazines
- Implementing a model in the currecy readership survey, suitable for media planning







Thank you!



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