THE NEW NRS IN NORWAY– FROM AIR TO EXTENDED CURRENCIES FOR NEWSPAPERS

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1 Introduction and Background

This paper will present the result of the Norwegian tender process for newspaper measurement which has taken place in the period from May 2008 to April 2009. To respond to the demands of the market we are developing extended currencies for newspapers and more frequent and detailed reporting of readership figures. The approach for extended currencies will be the main focus of this paper, even though the tender and our response are very extensive and touch on a number of complicated areas and issues. This paper will also describe how for many years we have reported Internet sites and mobile services together with the newspaper figures. The measurement of Internet sites is included in the new NRS agreement.

1.1 Newspaper Measurement in Norway

Readership measurement in Norway has a relatively short history (Futsæter & Østnes, 2001). In the late 1980s Gallup introduced telephone interviewing (CATI) in Norway and established a multimedia survey with marketing information. The Consumer & Media (C&M) concept was born. Since 1988 the Norwegian NRS has been an integrated part of this multimedia survey. C&M is the most important tool for media agencies, media and advertisers for describing markets and target groups, and for choosing media for advertising campaigns in Norway. [1]

At the Venice symposium in 2001, we described our refined RR method, Pure Recent Reading (PRR), for establishing AIR figures for Norwegian newspapers (Futsæter & Østnes, 2001). The demand for more frequent and detailed reporting resulted in a change from CATI FRY to CATI PRR in Norway (Futsæter & Holbæk-Hanssen 2000). PRR calculates the number of readers for the relevant issue periods, depending on the day of the interview and the day of publishing. We also believe that Pure Recent Reading better satisfies the strict theoretical assumptions for Recent Reading, which are acknowledged, but often ignored (Futsæter & Østnes, 2003).

1.2 New demands from the market

In recent years, the newspaper industry in Norway has been challenged by other media, advertising agencies and advertisers (Holbæk-Hanssen & Futsæter, 2009). In 2007 the advertisers and media agencies pointed out the need for:

- more precise measure of readership than AIR
- more frequent and detailed reporting of readership
- more qualitative readership data as an integrated part of the NRS
- documentation by the media of ad- and sales effects

The advisory board for the Norwegian NRS (SAL) in 2008 concluded:

- existing readership figures are credible as an OTS measurement for newspapers
- more frequent and detailed reporting of readership is necessary
- the market needs more than OTS figures for an average issue of a title
- media responsibility stops at the third stage of the Media Effect Pyramid (see chapter 2)

1.3 The NRS Tender

The most important aspect of the Tender Invitation for the main survey is to keep the core elements of the NRS and C&M as they are today:

- establishing official readership figures (AIR) for the measured titles
- Pure Recent Reading (PRR) by CATI is the preferred interview method
- link to target group information
- measuring of Internet sites, mobile services, local radio and local TV in the same survey
- possibilities for multimedia analyses

[1] http://www.tns-gallup.no/default.aspx?aid=9080712

Based on the Media Effect Pyramid the media agencies and advertisers have put pressure on the newspapers to develop a more precise measure of readership compared to AIR, and to deliver more frequent and detailed reporting. In view of this, in 2008 the Norwegian Media Businesses' Association (MBL) invited tenders for a new newspaper industry survey to start in 2010. Following requests from advertisers and advertising agencies, the newspapers (MBL) focused on three elements:

1. To report readership figures more often than twice a year
2. To give the market more accurate figures for smaller, local titles
3. To raise newspaper currency from level two to level three of the Media Effect Pyramid (MEP) to compete with TV (TV-meter), radio (PPM) and the Internet (NIP).

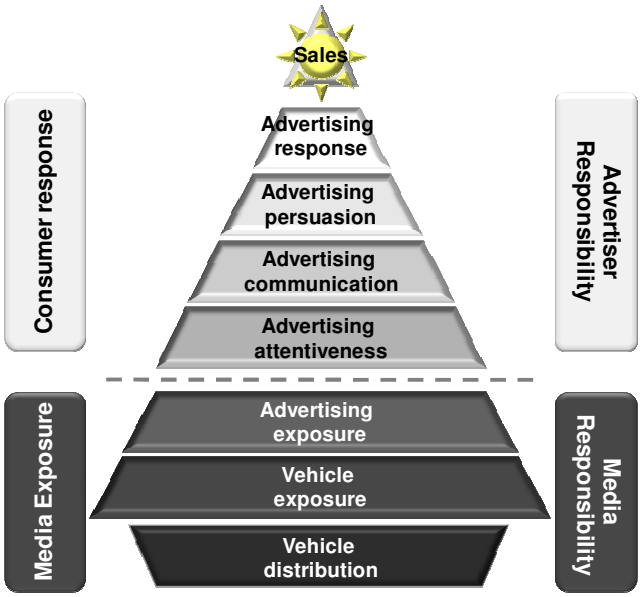
It was pointed out that providing readership figures beyond AIR for single titles or groups/syndicates would require additional research. The purpose for this research was to link Page Traffic findings to the official readership figures, and to report extended currencies for newspapers.

The tender invitation was issued in May 2008 to 11 research companies, and resulted in a contract with TNS Gallup in April 2009 for a period of 5+3 years.

2. The Media Effect Pyramid

The Media Effect Pyramid (MEP) (Sandvik, 2007), inspired by ARF's "New Media Model" (2002), has been used as a backdrop for our discussion on responsibility, requirements and expectations concerning the media data that exist as official currencies. We have transformed ARF's model into a pyramid for illustrative purposes, and added the term Effect in order to underscore the idea that each level of the Pyramid carries its own set of effects.

Figure 1. The Media Effect Pyramid



The model nicely illustrates the various effect levels that can be taken into account in planning and evaluating advertising campaigns. In addition to highlighting eight possible effect levels – where the importance of the relevance of the advertisement and product increase the higher up the pyramid one gets – it clearly distinguishes between two underlying dimensions in the pyramid. The first dimension consists of the three first levels of the pyramid and describes what the relevant and advertisement-dependent measurement levels of *media exposure* are. The levels in this dimension are both hierarchical and sequential. The other dimension consists of the five next levels (level 4-8) in the pyramid and deals with various degrees of *consumer response* as a consequence of exposure to an advertisement. These five levels are hierarchical, but not necessarily sequential.

This bifurcation neatly highlights the responsibility incumbent on the media with regard to documenting effects of the respective channels and individual media. The principle is that the media cannot/should not be credited or punished for the response to the advertising they carry, since the response is outside the media's control. Or as Erwin Ephron says in his newsletter (July 2006):

"*… The simple model is 'media deliver consumers, ads produce response…'*".

Though this is the commonly accepted point of view, there has been quite a debate in Norway about what advertisers and agencies wanted media to cover in their respective currency surveys. Some ultimately expressed a demand for research that could predict sales, for example through econometric modelling, on the basis of a currency study. Needless to say, the underlying assumption was that the media owners were to foot the bill. However, a fruitful dialogue between different players in the market led to a common understanding of the different levels in the MEP and what it consequently meant for media to cover in their currency surveys.

After some turmoil regarding newspaper currency in recent years (2006-2008) – which led to the establishment of the advisory board for the Norwegian NRS (SAL) – the newspapers could now fully focus on how to meet the demands of the market in an appropriate manner. This led up to the current tender, where the MEP was used to illustrate and discuss the ambitions for the new NRS. Figure 1 illustrates who carries the responsibility for creating effects on the different levels. The different levels can briefly be described as follows:

2.1 Three levels for media exposure

1. Circulation and distribution (Vehicle distribution). A *pure media effect*, which is defined differently for different media: newspapers/weeklies = circulation figures, TV = number of households receiving the channel; outdoor = number of boards/communication surfaces, Internet = number of persons with Internet access, etc. For newspapers, circulation is not connected directly to the number of readers, which is the commercial currency, except that it can be used to estimate readers per copy.

2. Media exposure (Vehicle exposure, OTS). Also a *pure media effect*, which tells us something about how many persons have been in a contact with a specific medium. As expected, the definition and calculation of the number of persons exposed is somewhat different for the various media channels: newspapers/weeklies = number of readers, TV = ratings for programmes or during a time period, outdoor = traffic flow, Internet = unique users, etc.

3. Advertising exposure. The last level remaining is a *virtually pure media effect*. This level can be defined as the number of persons exposed to the medium who have also been exposed to the advertisement in the same medium. For newspapers we can in practice define this as a measurement of how many persons on average will also be likely to see the advertisement in the newspaper in question. For TV this can be defined as ratings for a block of commercials, Internet = ad impressions (number of unique users on pages where a given advertisement appeared), etc. However, ad exposure must NOT be confused with ad attentiveness. The term that best describes a proper measure at this level is probably "likelihood of seeing an ad".

2.2 Objective for new documentation of the newspapers' readers

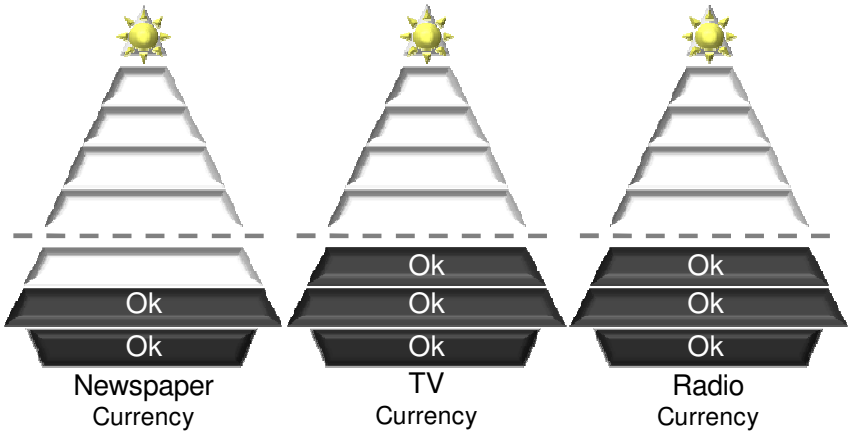
The NRS invitation to tender stated that the current survey programme satisfactorily addressed several overarching objectives of the newspapers' documentation and use needs. In addition, it was clearly specified that there was an objective to:

> *"Raise the newspaper data (print editions) to the third level in the Media Effect Pyramid… Today newspapers deliver reach figures on Step 2 of the effect pyramid (OTS: Opportunity to see) for an average edition. We would like to reach Level 2 (Advertisement exposure) to be more in line with print newspapers' most important competitors…"*

The reason for such an objective seemed to make sense if we compare the current newspaper currency with other media such as TV (ratings from a meter) and radio (ratings from PPM). In Norway, both these channels deliver ratings at the level of ad exposure. On the other hand we could also find support for such a change in Erwin Ephron's newsletters (2004):*"…we need to realize that OTS for any medium, as the word "opportunity" makes clear, must overstate what we are really trying to measure, which is "people seeing advertising"…".* Furthermore Ephron also states (2006) that *"…media are accountable for delivering targeted, attentive consumers. And that is where new media measurements should focus: the quality and attentiveness of consumers delivered."…"*

The figure below illustrates the current state of Newspaper, TV and radio currencies in Norway:

Figure 2. Different Currencies in The Media Effect Pyramid



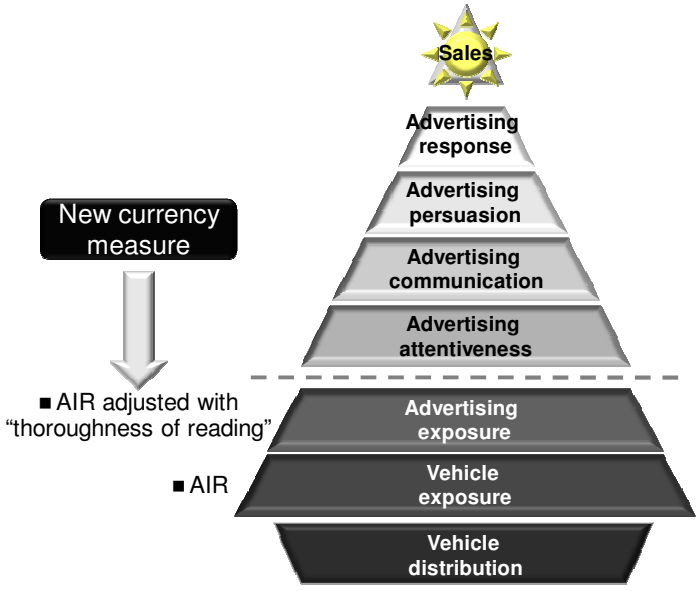
Thus, the aim was twofold; firstly, to meet the demand from the market for a more realistic measurement of what an advertiser is really buying, and secondly, to narrow the gap between the newspaper currency and the currencies of TV and radio, respectively.

In practice this objective means *devaluating* the currently established currency (i.e. AIR) in such a way that in the future we would provide a better estimate of how many – and who – will likely see the advertisement in the newspaper in question. The principle of devaluating the currency so that we end up with an estimate of "likely sees the ad" is in itself simple enough. How to solve this in a manner that was credible and easy to use by the market prompted several different approaches for calculation, measurement level and integration into planning tools. According to the invitation to tender, with the introduction of a new currency measurement, we would meet the ambition of:

> "Bringing the newspaper currency figures from Level 2 to Level 3 in the Media Effect Pyramid and hence being on par with TV's meter data and radio's PPM data."

Put simply, we needed to find an extended currency measurement that would take into account thoroughness of reading as illustrated in the figure below.

Figure 3. The Concept of a new currency measure



In this connection we deem it important and correct to point out that we are only moving one step up on *one* of the dimensions on which TV and radio deliver currency figures. In working with our solution for meeting the ambitions raised by the invitation to tender, we found several other dimensions of Level 3 of the Media Effect Pyramid that would be important to consider. These dimensions will be further outlined in chapter 3 of this paper.

2.3 Practical consequences of going one step up the pyramid

A key requirement for a successful launch of a new currency measurement is to have carefully thought through how the various numerical quantities need to fit together and how they are to be made available to meet requirements and expectations of primarily advertisers and media agencies. Likewise it has been – and still is - important for the newspapers themselves to evaluate the pros and cons of developing their currency versus staying with "the old school model". When we presented the intentions of the new Norwegian NRS abroad during the last year, we certainly received comments and questions from fellow media researchers. The most common questions were about the newspapers' readiness to take this step, and whether the new currency will change the underlying business model for selling and buying advertising. Needless to say, we raised some eyebrows and provoked gasps as well…

Despite the fact that the idea to develop the newspaper currency in the direction described in this paper is not new, no countries we know of have taken the full step yet. Although there may be several reasons for this, we think the main ones are political and a fear of the unknown. Surely the new extended currency for newspapers will not change the way newspaper ads are bought and sold overnight. The delivery of total audience will still be the same as always – but the measurement will be more accurate in terms of what the advertisers are buying. In any case, such a change sends a signal of a movement that the newspapers need to be conscious of, and still stay in control of. Otherwise they might see themselves slowly drifting towards a practice that was not intended in the first place.

Both during the tender process and in subsequent meetings we have had numerous discussions with newspaper representatives about how to deploy the new extended currency and practical consequences it may have regarding 1) campaign planning, 2) reporting and evaluation, and 3) settlement of accounts.

2.3.1 Campaign planning

The new currency measurement is intended to live alongside readership figures and will be relevant primarily for media planning. The idea was also for more frequent and more detailed reader data to be reported in a separate application (see chapter 5). This means in practice that seasonal data will not initially be integrated into media planning. Optimally – in order to more closely approach TV and radio, for instance – this should be integrated at some stage. Nor can it be ruled out that the market will demand this in the near future. One might consider initiating an effort to see how this problem can be solved during the coming contract period.

2.3.2 Campaign evaluation and reporting

Both TV and radio deliver after-the-fact reporting of campaigns run in the form of reach, frequency and GRP. The new NRS will in principle not offer possibilities of this type, though it would be naive to suppose that in the future the market will not demand them too. This may be particularly important for newspapers with considerable fluctuation in readership numbers to have a closer look at such "contact receipt" thinking. In Sweden (Callius 2005, Callius and Lithner 2007) a system has been put in place with a panel that is outside the actual readership survey. For the biggest newspapers, however, we might be able to deliver such data directly from the NRS – assuming that the newspapers extend the sample to 60,000 as proposed by TNS Gallup.

2.3.3 Settlement of accounts

Implications of the fundamental business model and settlement of accounts are probably the most controversial issue to solve. If the newspapers make data available that provide a new currency measurement one step higher in the pyramid and if more frequent and more detailed readership figures are published over time, we will move in a direction that *may have* consequences for the way advertising is bought and sold. If advertisers more clearly demand that prices should be settled according to the number of readers actually delivered (i.e. as in TV and radio), we are moving into territory that must be dealt with carefully, as this can have consequences for the newspapers' advertising and rate systems. However, this is outside TNS Gallup's mandate as a supplier of readership figures. Similar systems have been tried out before, e.g. the Danish Quality Rating Points (QRP) (Melby, Paul 2000) system without managing to gain a foothold at the time. The market was probably not ready for a system like that at the time, but this situation can change quickly, and we may perhaps be seeing the rough outline of such a settlement system also for newspapers in the future.

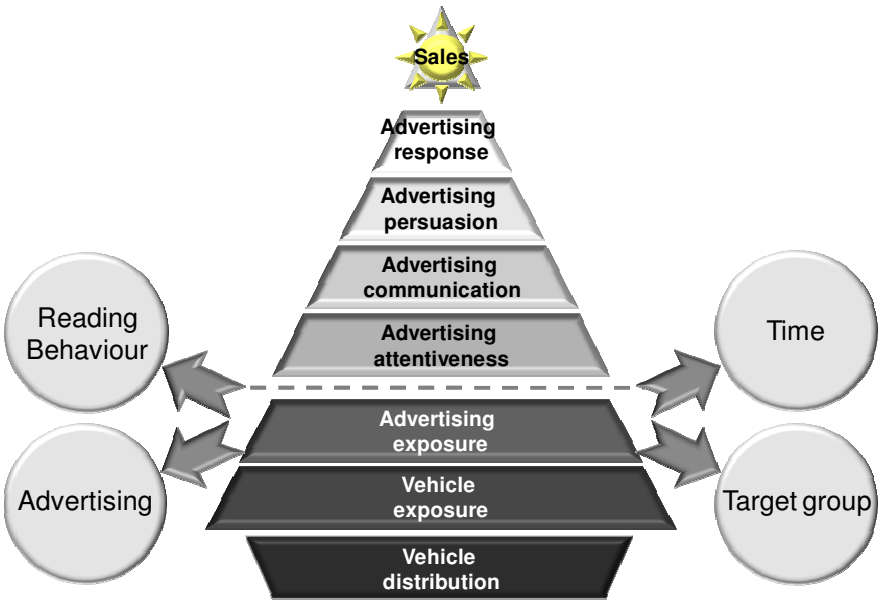
3. The Path to a New Extended Newspaper Currency

The idea of a devaluated or adjusted currency measurement has been discussed in a number of Norwegian and international venues. Likewise, some initiatives, such as outdoor, for example, have come up with solutions in which figures and register data from several different sources and surveys are integrated to establish a currency at the "likely sees the ad" level. The abandoned Danish QRP project for newspapers is another example of the same thing.

The invitation to tender did not state any absolute guidelines for *how* to put in place the new currency measurement other than that the most obvious approach would be to conduct Page Traffic studies and/or studies of qualitative relationships to the individual newspaper title (e.g. engagement). The invitation to tender stated in its outline that it was open to other solutions, as long as they satisfied the aim of getting one step higher in the pyramid. In addition to the primary CATI survey, the plan was for a secondary and separate survey to be conducted in order to fulfil the ambition of a new currency measurement. If Page Traffic were to be the natural approach, these data would have to be collected in a secondary survey.

However, when working on our offer, we did make a great effort to find alternate ideas and methods to meet the main ambitions in the invitation to tender: 1) to provide a new measurement at Level 3 of the Media Effect Pyramid and 2) to narrow the gap between newspaper and TV/radio currencies, respectively. When working on this it became clear to us that Level 3 of the MEP isn't just a matter of finding one new metric to add on to the AIR figure. We also needed to look at how TV and radio present their currencies to the market and how these currencies are being used. We found four main dimensions of Level 3 that we needed to take into consideration when trying to pave the way to a new currency.

Figure 4. The four dimensions of Level 3 of the Media Effect Pyramid



The two dimensions on the left-hand side are specific metrics that would be used in a calculation for a currency at a higher level in the Media Effect Pyramid. The two dimensions on the right are surroundings which you would like the currency to be integrated with in terms of flexibility and reporting. The most important dimension would obviously be reading behaviour, but the three others (time, target group and advertising) are also of importance when looking at how the extended currency would be compared to those of TV and radio.

3.1 Time

Both TV and radio deliver overnight ratings from their meters and PPM data, respectively. One aim for the new NRS survey was to produce readership data more frequently and at a more detailed level such as weekdays, seasonality, etc. For that reason we considered it very important that the new currency figure should be reported at the same detailed level, and with the same level of frequency, as the AIR figure. This would argue for a solution that would fully integrate the new currency with the AIR at respondent and title level, even if it were to be derived from a separate study.

3.2 Target group

Flexibility in breaking down the new currency by different target groups is another important matter. Of course we could simply put an average figure on top of the total AIR figure and be happy with that. But this would eventually cause a problem when breaking down by different target groups since we know that reading differs between different groups of readers (Sandvik 2001). We could eventually select a number of predefined target groups and assign different values for each of these groups (e.g. gender, age, education, frequency of reading, etc.). However, in our opinion this would be an insufficient solution, as the problem would arise again when selecting target groups outside those that are predefined. For years the newspapers have had full flexibility in target group analysis, since the C&M study has a single source target group study linked to the CATI NRS study. To keep this linkage and flexibility would be very desirable for the newspapers. These points would also argue for a solution that would integrate the new currency with the AIR at respondent and title level.

3.3 Advertising

There is a fine line between Levels 3 and 4 in the MEP model, but without crossing the boundary to Level 4, the hard qualities like ad size or the use of colour will obviously have an impact on the likelihood of seeing an ad. Hence – the smaller the ad the smaller the real audience. In Norway both TV and radio are taking spot lengths into the equation when calculating the price of their GRPs. This is done by different indexes for different spot lengths. We developed the idea of Ad Attentiveness Score to use as a further adjustment on top of a new "thoroughness of reading" measurement (see Figure 3). The basic idea is the same as one finds for TV and radio. But since the newspapers already have a fixed price for different ad sizes – this is indirectly accounted for. Even though this does not adjust the "likelihood of seeing" figure, implementation of Ad Attentiveness Score was temporarily put on hold. We describe the concept a bit more in detail in section 7.4.

3.4 Reading Behaviour

The main denominator of the new extended currency is reading behaviour. As we stated earlier, conducting Page Traffic surveys was initially viewed as the most viable option for obtaining the new measurement. In the working process, however, we came up with a simpler and more pragmatic approach to obtaining what the newspapers wanted. We called this new approach the Readership Engagement Score – as it would give us a measurement of how engaged a reader is with a given newspaper through an "amount of newspaper read" question. Both Page Traffic and the Readership Engagement Score have their pros and cons, which we describe more in detail in the following sections.

3.4.1 Page Traffic

Page Traffic provides newspapers with ample opportunity to document and enhance their documentation of reach figures. If the new currency measurement is to be based on a solution where Page Traffic studies need to be conducted, we see no possibility other than having to conduct such surveys separately and outside the actual main survey. The reason is that we want the newspapers' readers exclusively as respondents and for the specific editions and pages of the particular newspaper to be surveyed. Including this in the main survey, where there is an ongoing representative geographic sample of an estimated 160 titles will be impossible for practical and financial reasons.

Using Page Traffic, the new currency measurement will be an average figure for the individual newspaper or group of newspapers. According to Samarbeidsutvalget for Avisenes Lesertallsmålinger (SAL, Joint Committee for Newspaper Readership Surveys), this is to be calculated at spread level, i.e. that pp. 2+3, 4+5, 6+7, etc., belong together as spreads. Page Traffic makes it possible to publish average figures for the entire newspaper as a whole, per content area, page or section. Thus, the new currency measurement would appear e.g. as: A newspaper with 100,000 readers and an average Page Traffic score of 81% would receive an adjusted currency measurement of 81,000 readers.

Figures 5 and 6 show average Page Traffic scores (Sandvik, 2009) from a test we carried out for *Fredriksstad Blad* in spring 2009. *Fredriksstad Blad* is a local newspaper in the south-eastern part of Norway. The test was performed on TNS Gallup's online access panel with a sample size of 526.

Figure 5. Average Page Traffic per page vs. per spread

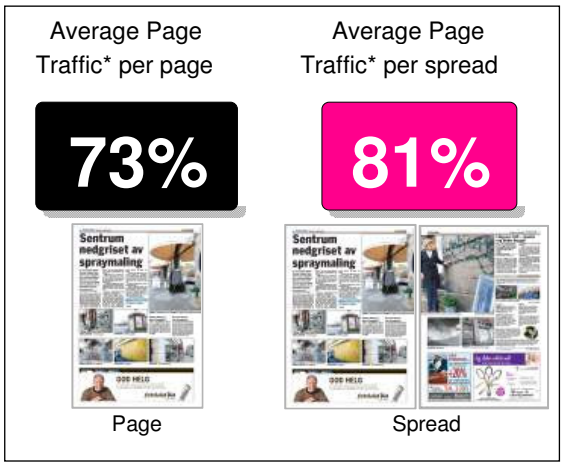


Figure 6. Average Page Traffic per day for editorial content pages only

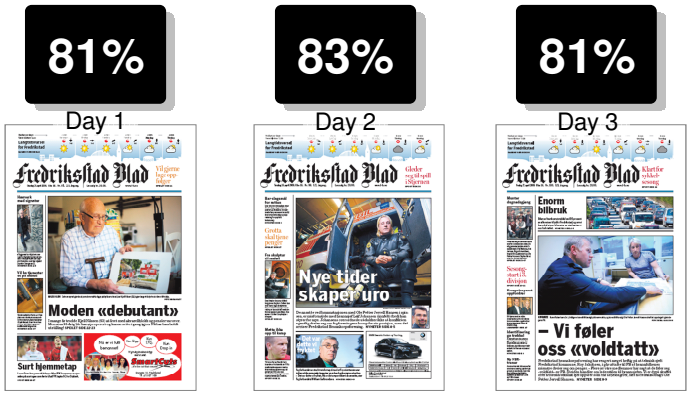
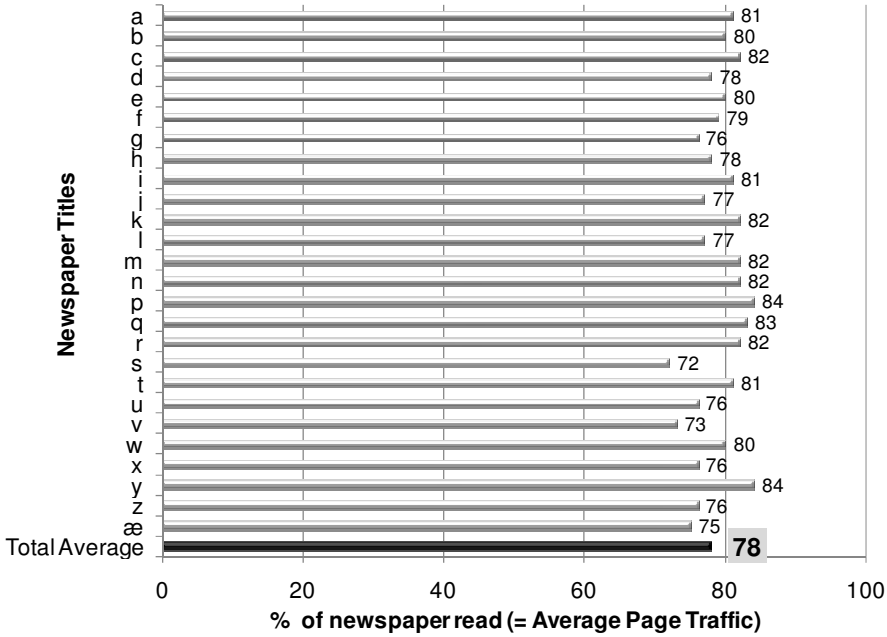


Figure 5 illustrates the difference between calculating the average Page Traffic score by individual page or by spread. The reasoning behind the spread calculation is that if a reader answers that he/she remembers having read page 2 but not 3, he/she must also have been in a exposure situation to page 3 even if he/she does not remember it. The average Page Traffic score for spreads will be higher than the "per page calculation" since the "per spread calculation" indicates "read page 2 *or* page 3". Figure 6 shows the per day score if we just calculate average Page Traffic based on pages where editorial content is dominant. The results indicate that the average Page Traffic scores are more or less equal if you calculate them on spread or editorial content pages only, and both would be adequate measurements of what the newspaper actually delivers to the advertisers. We would express this measurement as a probability of being exposed to advertising. The results of this test are also very similar to average figures from other studies we have done (see Figure 7).

The major challenge with such a solution is conducting the actual Page Traffic study and organising it. For example, it would be unrealistic to demand that a Page Traffic study be conducted for each of the 160 newspaper titles covered by the NRS, even they were to be conducted separately from the main survey. A more realistic implementation plan would be to conduct a number of Page Traffic studies of newspaper titles that may represent homogeneous groups of newspapers and that are representative. In addition, a Page Traffic study for an individual newspaper or group of newspapers should be conducted every day over a given time period to ensure that the results cover a certain range of the newspaper's editions. This is a very similar approach to what was used for a large Page Traffic study for the local newspapers in Norway in 2001 (Sandvik, 2001). In this study we conducted Page Traffic surveys for 26 local newspapers, where each newspaper where surveyed over a 2 week period, measuring 12 individual issues for each newspaper title. In total approx. 200 interviews were conducted for each newspaper title.

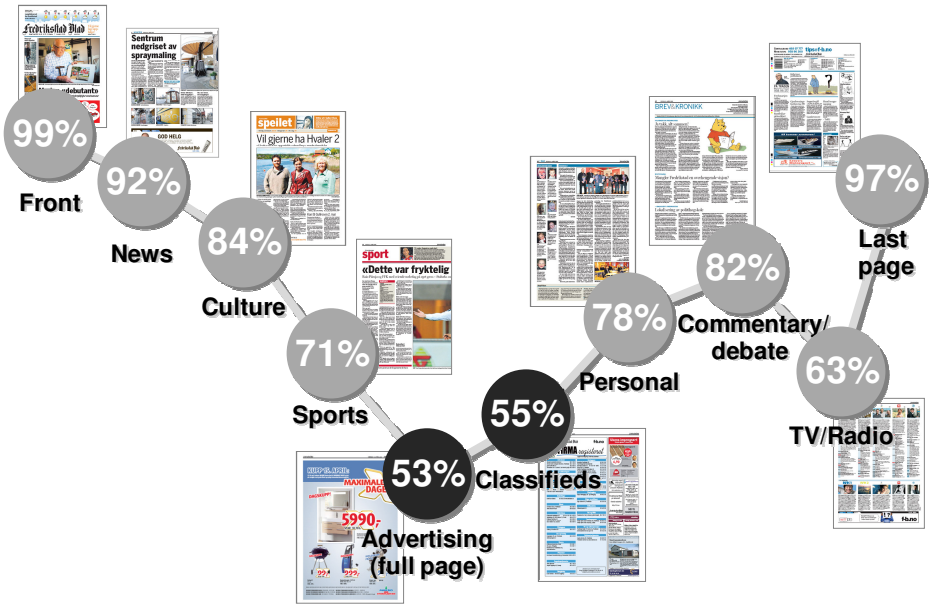
Figure 7. Average Page Traffic per newspaper title for editorial content pages only



As the graph shows, the results overall were remarkably stable, even though there were some outliers. On average the Page Traffic score for editorial pages was 78% across all titles. Other surveys done for other newspaper groups also showed the same stability among comparable titles.

Furthermore, one would have to decide how deep one wants to go in publishing Page Traffic for different pages, content categories and sections, and how this could be integrated into media planning software. Such a planning tool may quickly become very complicated if the intent is to plan all the way down to detailed content area levels in the newspapers. We know not least from previous experience that the vast majority of newspapers are not able to coordinate placements with content categories as of today. Indeed, they are not even able to have a common system of classifying content categories across newspaper types. We therefore encouraged the newspapers not to be too detailed in their wishes in the first place. An initial approach of content grouping could be as shown in Figure 8, where we have aggregated results from the Page Traffic study for *Fredriksstad Blad*. The figure also illustrates how this particular newspaper is edited by showing Page Traffic scores in a typical flow of different editorial content from front to back. We have included the average values for full page ads and classified pages in the figure for illustrating purposes. Following the definition of Level 3 in the Media Effect Pyramid, neither full page ad pages nor classified pages would be used in any calculation to obtain the new extended currency figure.

Figure 8. Page Traffic through Fredriksstad Blad per content category



A third challenge would be that we are basically adjusting readership figures only at an overarching level. We know that Page Traffic numbers will vary by segment, such as gender, age and education. For that reason questions will quickly be raised about what segments, e.g. gender and age – adjustment factors need to be entered for. This complicates the task considerably. A final factor, of course, is financial. We had good reason to believe that conducting an unspecified number of studies (a number that can quickly add up to 30 or 40 depending on how newspapers can be grouped) would be expensive. Organisation and implementation in the planning software would trigger additional costs.

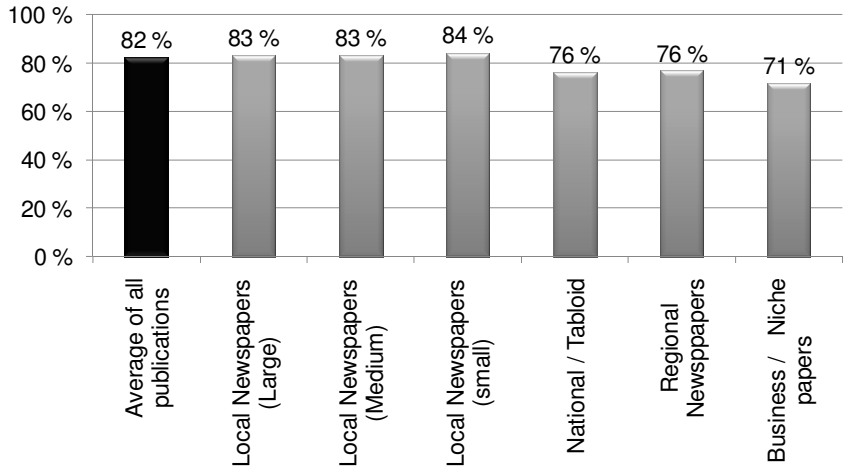
Even though the implementation of Page Traffic was in principle the most obvious measurement tool to use to meet the newspapers' aims, it was also a relatively complicated measurement tool to implement. That is why we also looked for other possibilities we might have for obtaining a new adjusted currency measurement without having to rely on the results from separate Page Traffic studies.

3.4.2 Readership Engagement Score (RES)

If we were not going to be relying on the Page Traffic approach, we needed to find a measurement that could simulate a hypothetical Page Traffic result. Several different studies that TNS Gallup has done for the newspapers, in particular a number of Readership Behaviour Score (RBS) studies, show that there is a very strong correlation between loyalty to a newspaper and the amount read. The RBS score is based on the three components loyalty, amount read and time spent. In our experience, it is the first two that are of decidedly greatest importance for the score that is calculated, and that time spent is a measurement that will vary for reasons other than how thoroughly one reads the newspaper. This is also supported by other international studies.

We already have information about loyalty from the main survey. If we could include a measurement of amount read in the main survey, we would in principle have the two components we need for creating a simulated Page Traffic figure. During work on the NRS tender we performed some simple tests of this idea to see if we were on the right track. The results we obtained (see figure 9) were very promising and convinced us that we could come up with a cost-effective alternative to Page Traffic, in any case to find a simple number that would bring the newspapers up to Level 3 in the MEP. We gave this method the working title Readership Engagement Score (RES).

Figure 9. Average amount of newspaper read across newspaper groups



The big advantage of this approach is that all newspapers and all of the newspaper's readers will receive a score. A parallel study need not be done, and the solution will be far more reasonable than carrying out a number of separate Page Traffic surveys. Since the data will be at respondent level in the main survey, it will be far simpler to implement this in the planning software. For example, we would avoid problems with having to choose which target groups and segments are to be adjusted, since scores can be calculated for each individual in the survey. Any implementation of RES for seasonal and weekday variations will also be substantially simpler and more correct for the same reason.

What this technique does not solve initially is how reading varies between different content categories or pages of the newspaper. However, the importance of this will depend on how and what the newspapers ultimately will end up implementing in planning software. One possible solution we envisaged was to include a selected set of questions concerning reading of various types of content categories in order afterward to construct various Readership Engagement Scores for different content categories according to the response they get. This was an idea we put aside at the outset, but as it turned out, one we needed to return to, We describe this in further detail in chapter 4 of this paper.

RES would be a simple, yet cost-effective solution for the goal of bringing the newspapers from Level 2 to Level 3 in our MEP model. A related idea was presented by Ted D'Amico at the Worldwide Readership Research Symposium in Vienna in 2007.

3.4.3 Page Traffic vs. Readership Engagement Score (RES)

Both Page Traffic and Readership Engagement Score represent possible paths to a new extended currency measurement. They both would produce a devaluation of the current AIR measurement, thereby raising the newspaper currency from Level 2 to Level 3 in the Media Effect Pyramid. They both differ in approach, and they both have pros and cons. We have summarised the main pros and cons in the table below:

Page Traffic	Readership Engagement Score
Pros: ■ Generally accepted in the market. ■ Based on a real review of the newspaper ■ Provides a score for response for pages, sections and content categories.	**Pros:** ■ Simple, and all newspapers receive a score. ■ Provides direct variation over time ■ Provides direct values for all possible target groups ■ Low costs.
Cons: ■ High costs. ■ Needs to be done outside the main survey. ■ Impossible to do for all 160 newspaper titles.	**Cons:** ■ Does not provide direct information about response to various portions of the newspaper. ■ Perceived *only* as being a devaluation of the current AIR measurement. ■ Acceptance in the market?
Main Challenge: ■ How to implement Page Traffic results for each newspaper so that there is full flexibility with regard to breakdowns by target group, day of the week, season, etc. ■ How to define the standard for implementation and reporting in the planning software.	**Main Challenge:** ■ How to obtain a more nuanced measurement that can indicate response to various parts of the newspaper.

Discussions of the topics listed above led us to a solution that was not present at the beginning of the tender process, but rather evolved through meetings with the executive committee for the new NRS study.

4. Extended Currency for Newspapers

Our initial proposal was to calculate and implement RES scores in the planning environment to extend the newspaper currency by giving a better estimate for how many (on average) will see an ad placed in a given newspaper. This solution would extend the currency by reporting OTS for a random page in a newspaper in addition to the OTS for the newspaper as a whole. Our principal argued that even if it had an economical and practical gain, a single RES score would only devaluate the readership figure with a given factor, and not reveal any details regarding the actual reading pattern within the newspaper. Hence what they really aimed at was having page traffic values for each measured newspaper in the full sample NRS, and these values should be available for planning an analysis purposes. In the following we will describe the challenges this raised, our final proposed solution as of the current stage of development.

4.1 Main Challenges

To satisfy MBL's requirements we faced a number of challenges. The four biggest of these were:

(i) Scope

The extended measurements for reading were to cover all newspapers measured. In the Norwegian NRS, a total of approximately 160 newspapers are currently measured and reported on. Among them are everything from major national seven-day newspapers to small local newspapers with few weekly editions. An absolute requirement from MBL was for the extended currencies to apply to all newspapers regardless of size and frequency of publication. On the other hand, they did not define any fixed framework with regard to how these currency figures should be obtained, appealing here to our creativity and innovative skills.

(ii) Operationalisation

The extended measurements should be made accessible in the planning software. A requirement from the market and MBL was for the newspapers' new currency measurements to be readily accessible in the existing planning and analysis software. This requirement means that we not only had to develop a model fit for purpose, but also to develop and adapt our planning software to be able to handle the new measurements.

(iii) Dynamic aspect and continuity

The set-up was to be dynamic, and the extended currencies were to be reported in connection with each main reporting by the NRS. Over several years Norwegian newspapers have, of course, conducted surveys outside of the NRS in order to document page traffic and probability for ad exposure in their own newspaper, for example. In many instances this was a successful endeavour, often with a focus on the date of publication, but where the interest and use of the results quickly diminished. With its approach, MBL's wish was to provide the market with continuous information regarding the newspapers' suitability as an advertising medium through ongoing reporting of the extended currencies linked to the NRS.

(iv) Money

Development, implementation and reporting were all to be placed within a relatively limited financial framework. As can be seen in section 1.2, there are several cost-driving elements in MBL's tender document. Frequent reporting of the extended currencies is only one of many factors that will lead to that the implementation of coming NRS waves will have a higher cost than has been the case until now. Not least the planned doubling of the sample will lead to a giant leap in costs. Despite the financial crisis and limited budgets for the Extended Currency part of the project, MBL was set on carrying out measurements that raised the newspapers' documentation a step in the MEP by introducing extended currencies. To satisfy this requirement we had to come up with a methodologically tenable solution within quite tight budgetary constraints.

4.2 The Solution

The final objective of this project is to report readership by content area/page type for all newspapers measured in the NRS. With the challenges described in 4.1, we had numerous discussions, internally, with MBL and with media buyers with regard to what would be a minimum of gathered information for reaching this objective. We (along with our principal) eventually settled on a solution consisting of two elements.

1. A Page Traffic Establishment (PTE) survey – to collect necessary information about reading of different content areas in a sample of representative newspapers.
2. A somewhat extended NRS (xNRS) – to be able to model the information from PTE to the NRS respondents.

These two survey elements will henceforth constitute the basis for reporting the extended currencies for all newspapers measured in the NRS. The first results on the basis of the synthesis of the two surveys will not be reported until autumn 2010, so that all the details are not completely in place. However, since the field work for the xNRS has already begun, there will be no changes with regard to what is presented here. With regard to PTE, we are still putting the finishing touches on the concept in order to present an optimal solution to all newspapers included in the NRS.

4.2.1 Page Traffic Establishment (PTE) survey

The "simple" solution for obtaining the extended currencies would no doubt be to carry out Page Traffic measurements for all newspapers measured in the NRS. As we stated above, this would be a financial impossibility. The desire to be able to present extended currencies for all newspapers is nevertheless present, and following a thorough review of the subject material and characteristics of the newspapers measured in the NRS, we designed a setup in which each NRS newspaper is placed in a defined newspaper group, which in a PTE survey is represented by 1-4 newspapers. The nine defined newspaper groups to be measured in a PTE survey are:

1. *Dagbladet* (one newspaper)
2. *VG* (one newspaper)
3. *Aftenposten* (one newspaper)
4. Regional newspapers (four newspapers)
5. Financial newspapers (two newspapers)
6. Niche newspapers (two newspapers)
7. Local newspapers type 1 (Local – District) (four newspapers)
8. Local newspapers type 2 (Local – Local) (four newspapers)
9. Local newspapers type 3 (Local – few issues per week) (two newspapers)

Thus, a total of 21 newspapers will be measured in a PTE survey and represent the 160 newspapers in all that are measured in the NRS. A newspaper or group of newspapers is to be represented by measurements of a relevant number of publication days, and we have defined the number of interviews at a maximum of 700 per group. This means that a maximum of (9*700)=6,300 interviews are to be conducted in a PTE survey. We have also defined a number of other criteria for the implementation that are to ensure equal treatment of the newspapers. One of these, for example, is that directly competing newspapers/newspaper groups are to be measured in the same period.

In addition to the content-related standard set-up for Page Traffic surveys that we reported on in section 3.4.1., the respondents will respond to questions corresponding to the NRS about the amount read per subject category (print edition reading in general) as well as total amount read for the PT-measured newspaper.

- *"When you read print editions of newspapers, approximately how much of what appears in the following content areas do you usually read or look at?*
- *"When you read the print edition of <measured newspaper>, approximately how much of the newspaper do you usually read or look at?"*

It is important to point out that these questions are asked at the end of the interview, after the respondent has completed the actual Page Traffic portion of the interview, so that they do not confuse the respondent while the Page Traffic measurement is being carried out.

Furthermore, in the PTE survey we ask/have the questions used in the NRS to establish an AIR figure.

- *("Have you read or looked at <newspaper> during the past 12 months?") – given, not asked*
- *("When was the last time you read <newspaper>?) – given, not asked*
- *"How many of the last six editions of <newspaper> have you read or looked at?*

The plan is to conduct a PTE survey every other year, with first survey in spring 2010. The interviews are to be conducted as CAWI interviews on TNS Gallup's Internet Panel.

4.2.2 The extended NRS - xNRS

The basic elements of the readership survey will remain unchanged; CATI will continue to be used as a method for collecting data, and Pure Recent Reading (PRR) will be used to determine the AIR levels for the individual newspapers. In order to subsequently model readership of various content areas in the newspaper, from summer 2009 we have included a set of new questions. All respondents are asked to respond to eight general questions regarding reading various content areas in the newspaper. *"When you read print editions of newspapers, approximately how much of what appears in the following content areas do you usually read or look at?* The response alternatives for this question are:

- Everything/nearly everything
- About 3/4
- About half
- About 1/4
- Almost nothing
- Nothing
- Don't know

The content areas measured are:

1. News (local, national, global)
2. Sports
3. Business and finance
4. Culture and entertainment
5. Debate and comment
6. Consumer and lifestyle
7. Birthdays, weddings, funerals, etc.
8. Radio and TV

In addition to these general questions concerning reading various content areas in the newspaper, we included a question that uncovers the amount of reading for each title the respondent has been in contact with within the last six published editions respectively – *"When you read the print edition of …, approximately how much of the newspaper do you usually read or look at?"* The response alternatives here are:

- Everything/nearly everything
- About 3/4
- About half
- About 1/4
- Almost nothing
- Nothing

In other words, each respondent is to state in general how much they read of the various content areas in print editions of newspapers. In addition, they are to state how much they read in total, newspaper by newspaper, of the print editions of newspapers they have had contact with within those newspapers' six most recent publication dates.

4.3 Modelling

Through this setup, both the extended NRS and PTE, in addition to original content, will have corresponding information on reading content areas in newspapers at a general level, as well as total amount read for each newspaper. Moreover, the PTE survey will contain questions on reading frequency for the newspaper measured – parallel with the NRS.

In view of this, the ambition is to model reading of content areas/page types for all newspapers in the NRS and include these modelled values in the ordinary NRS reporting.

Development of the final model or models for this operation is not yet completed, since a full-scale PTE as mentioned is not planned for implementation until spring 2010. However, a small-scale Page Traffic test was conducted in May 2009, in parallel with our running an extended NRS (section 4.2.2) one week. The ideas and figures that we are presenting here are primarily based on the results of these tests.

The content of the two surveys will be:

EXTENDED NRS SURVEY (xNRS)	***PAGE TRAFFIC ESTABLISHMENT SURVEY (PTE)***
A1. Read last 12 months	(Given)
A2. When last read (recent reading)	(Given)
A3. Frequency of reading (measured)	B3. Frequency of reading (measured)
A4. Amount read (measured)	B4. Amount read (measured)
A5. Calculated RES	B5. Calculated RES
A6. General interest in reading (measured): - News - Sports - Etc	B6. General interest in reading (measured): - News - Sports - Etc
A7. Demographics	B7. Demographics
A8. "Page Traffic" for each title (MODELLED) ***- News*** ***- Sports*** ***- Etc***	B8. "Page Traffic" for title/group (measured) - News - Sports - Etc

The main point when the battery of questions was defined was to put in place as many points of contact between the two surveys as possible as a basis for use in modelling work. The table above provides an outline of the content of the two survey concepts and that our objective is to model **A8 – Page Traffic on content areas for each newspaper** based on the observed values in **B8 – Page Traffic for each title/newspaper group.**

The result of this modelling will yield values for relevant content areas at respondent level for all newspapers measured in the NRS. We have chosen to name these quantities ***Content Exposure Probabilities (CEP)***, since in practical use in the NRS they are intended to function as weightings/probabilities on the established AIR figures.

Put simply, the modelling will take place in two steps. Step 1 will be to construct a robust general model that establishes correlations between B3-B7 and B8 per title/newspaper group. Step 2 will then transfer the established model to xNRS and calculate CEP for the relevant subject matter categories for each newspaper (A8).

Our statisticians are currently working on evaluating the available test data, and we are still a way from a final model. We have uncovered a good relationship between B4, B6 and B8, which gives a promising base for modelling CEP in NRS. In the figure below (Figure 9) the correlations between the general amount read of different Content Areas (B6) in the newspaper Fredriksstad Blad and what the respondents state that they have actually read in the newspaper (B8) for the copies issued in the test period. In general a correlation(r) above 0,5 is strong, above 0,6 is very strong, and above 0,8 is extremely strong, so these figures shows that the correlations found in the test material are strong, significant and meaningful. When using information about Amount Read (B4) as a second input the explanatory model is even more robust.

What we are currently working on is primarily how to calibrate the answer distribution between A6 and B6, Here the data collection method is of relevance, as xNRS is carried out as CATI-interviews, while PTE is CAWI based. Our primary goal is as good as possible to recreate in xNRS the results from PTE both for each content area and total amount read. There are several ways of achieving this goal, and we will choose the method which is both robust, is possible to generalize to all measured newspapers, and that also allows for the modelled results to change over time. To finalize this part of the model we will conduct further pilots to investigate how different methods of calibration will work.

Figure 10. Correlations (r) for a sample of content areas from a PT test for Fredriksstad Blad

Claimed Reading amount	Observed reading (Page Traffic)					
	News	Sports	Culture	Debate, comments	TV & radio	Personal etc
News	0,66					
Sports		0,86				
Culture			0,46			
Debate, comments				0,67		
TV & radio					0,65	
Personal etc						0,69

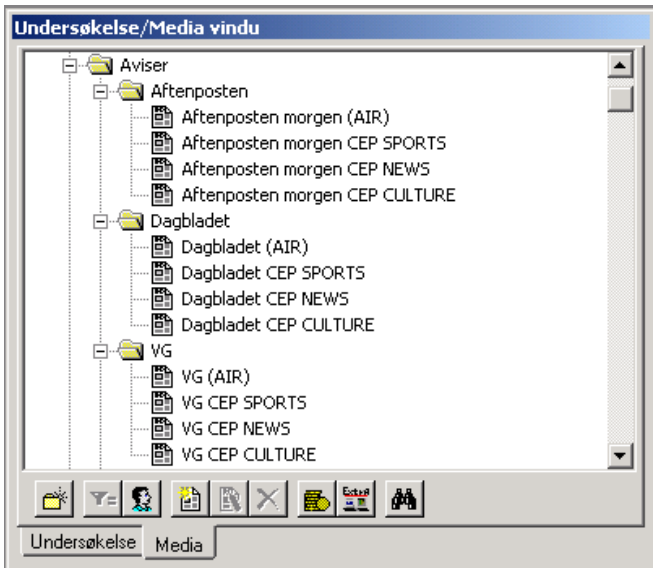
CEP will not be reported in the NRS until autumn 2010.

4.4 Implementation

The Norwegian NRS is reported in the planning and analysis tool Galileo from Confirmit[2]. As in most other planning software, the individual newspapers readership figures are reported as Average-Issue Readership (AIR). In addition to this level, by entering the extended currencies/reach measurements we will also have an opportunity to evaluate and analyse newspapers based on CEP for the individual newspapers' relevant content areas. In practice this means that users can use not only the individual newspapers' AIR figures in planning/analysis, but also figures from the particular newspaper's relevant content areas – so that placing an ad in a different place in the newspaper will yield different reach figures.

All users who subscribe to the newspaper index will have access to all reported currencies, both the original AIR currency and relevant CEP values for each newspaper. As illustrated in the figure below, the user can then choose which currency he wishes to use in planning or analysis work.

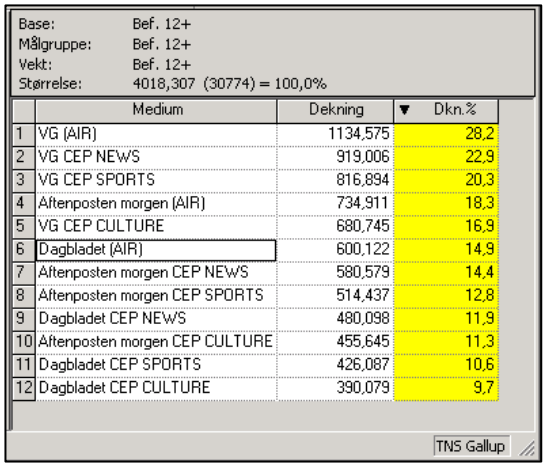
Figure 11. Choosing different newspaper sections for media planning and analysis



[2] http://www.confirmit.com/

In practice this will mean operating with different reach figures for the different editorial content in each newspaper (see illustration in Fig. 12)

Figure 12. Different reach figures for different editorial sections (dummy)



Base: Bef. 12+
Målgruppe: Bef. 12+
Vekt: Bef. 12+
Størrelse: 4018,307 (30774) = 100,0%

	Medium	Dekning	▼ Dkn.%
1	VG (AIR)	1134,575	28,2
2	VG CEP NEWS	919,006	22,9
3	VG CEP SPORTS	816,894	20,3
4	Aftenposten morgen (AIR)	734,911	18,3
5	VG CEP CULTURE	680,745	16,9
6	Dagbladet (AIR)	600,122	14,9
7	Aftenposten morgen CEP NEWS	580,579	14,4
8	Aftenposten morgen CEP SPORTS	514,437	12,8
9	Dagbladet CEP NEWS	480,098	11,9
10	Aftenposten morgen CEP CULTURE	455,645	11,3
11	Dagbladet CEP SPORTS	426,087	10,6
12	Dagbladet CEP CULTURE	390,079	9,7

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The effect of the newspaper's CEP will be different on different target groups, since the individual CEP value (maximum of nine per newspaper) is modelled at respondent level in the NRS database. The modelling of CEP will be performed at each publication of the official AIR figures, based on the most recently available data from the PTE survey. This will lend a dynamic aspect to the results presented to end users, and the levels will vary from reporting to reporting. An implementation of the extended currency concept in Galileo requires development of both the interface and calculation models in the software, and we are currently working on specifying the details for how this is to be done. The plan is to have a version of Galileo that can handle the new measurements by the end of 2009, for distribution to our users in summer 2010.

5. More Frequent and Detailed Reporting

New market demands such as competition from TV Meter data, with its detailed overnight reporting, and the Internet, with even faster and more sophisticated data, have put print research under pressure from electronic media and advertising agencies. Moreover, the newspapers have a growing desire to analyze seasonal and day-to-day changes themselves, so that they can make strategic editorial assessments in an ever-changing media landscape.

Even though readership figures are relatively stable compared to, e.g. TV figures for overnight ratings, they tend to fluctuate (Futsæter & Østnes, 2001; Futsæter, 2004).

5.1 From 30,000 to 60,000 interviews

From 2010 the NRS sample will increase from 30.000 to 45,000 interviews yearly, with an option to extend to 60,000 beginning in 2013. This will yield more valid readership figures especially for local newspapers and enable us to report figures each quarter and for weekdays for national newspapers.

Over the course of twelve months, the number of interviews varies greatly, from the national papers (currently 30,000 interviews) to the smallest locals with 400 interviews; Hence, the possibilities for reporting the different papers on a daily and seasonal basis will vary. Policy decisions must be made as to the margins of error that are acceptable for the various newspaper groups.

5.2 More frequent reporting of readership figures

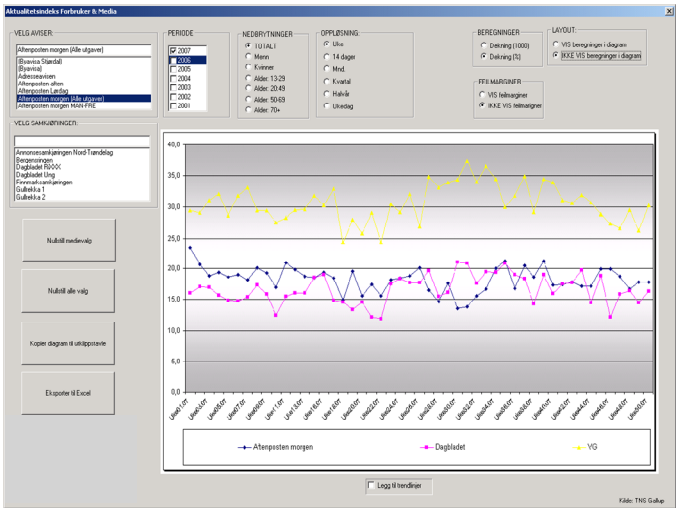
The daily and monthly fluctuations can be explained by the readers' needs, interests and available time to read different papers from day to day and during the course of the season. The media agencies and advertisers would like to know more about these readership fluctuations in order to improve media planning. Furthermore, more frequent reporting could provide useful information to the newspaper publishers for editorial product development and strategic decision-making (Futsæter, 2004).
We have developed a web application for frequent updating of readership figures:

- Quarterly reporting of readership figures from 2010
- Monthly reporting of readership figures from 2013
- Reporting by weekday, month and quarter

The web application will have a graphic interface with export facilities. The users will be able to pick newspapers and newspaper groups, year of interviewing, period (quarter, month, weekdays), standard demographics (age, gender, income, education) and geographic area. The figures will be presented with margins of error, and the minimum of interviews will be 200.

The figures in the web application will be flagged as unofficial, and the official readership figures will still be reported to the market by Galileo every six months on the basis of twelve months' interviewing.

Figure 13. New web application with frequent updating of readership figures

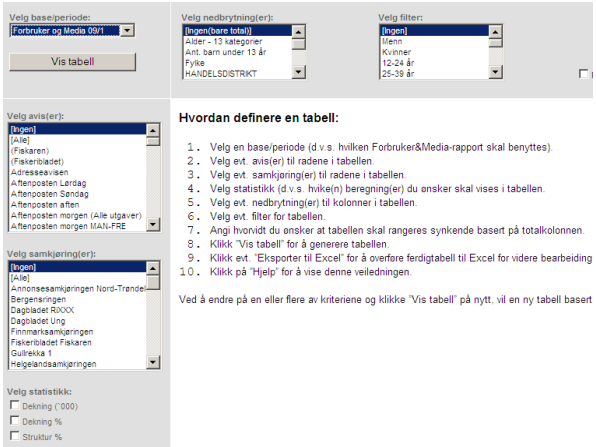


5.3 New multimedia report

Since the new NRS is still integrated into the multimedia survey C&M, it would be possible to report simple multimedia combinations frequently. The new multimedia report will include daily reach for all measured media and total reach for media houses:

- All 160 newspapers and newspaper syndicates
- All electronic newspapers
- Local radio
- Local TV
- Mobile content
- Total reach for media houses
- Demographic breakdowns
- Updated twice a year

Figure 14. Extended web application with all media



This report will replace the simple e-mail reporting of the national media houses that has been the standard until now.

6. Multimedia

Audience research in a digital world is facing new methodological challenges as the borders between different media are blurring. Understanding cross-media consumption and measuring multimedia campaigns are important topics for the media industry, which raises the question of whether conventional media research is providing the sort of information advertisers need. Norway is a highly developed media and telecoms market and is often used as a test bed for new technology. This is of particular interest since at the same time Norwegians still have the world's highest consumption of printed newspapers. Furthermore, Norwegian media owners have come far in the development of delivering content on multiple technological platforms. Most of the newspapers in Norway have been delivering content on different platforms since the middle of the 1990s. The demand for multimedia documentation and cross-media analyses has existed for over fifteen years.

Multimedia analyses can be divided into purposes:

1. The media house's need for multimedia analyses, mostly for local media.
2. Developing a new multimedia concept for real multimedia planning, mostly for the national market.

6.1 The media houses' need for multimedia analyses

Both national and local media houses need to do cross-media analyses for strategic purposes and for multimedia analyses.

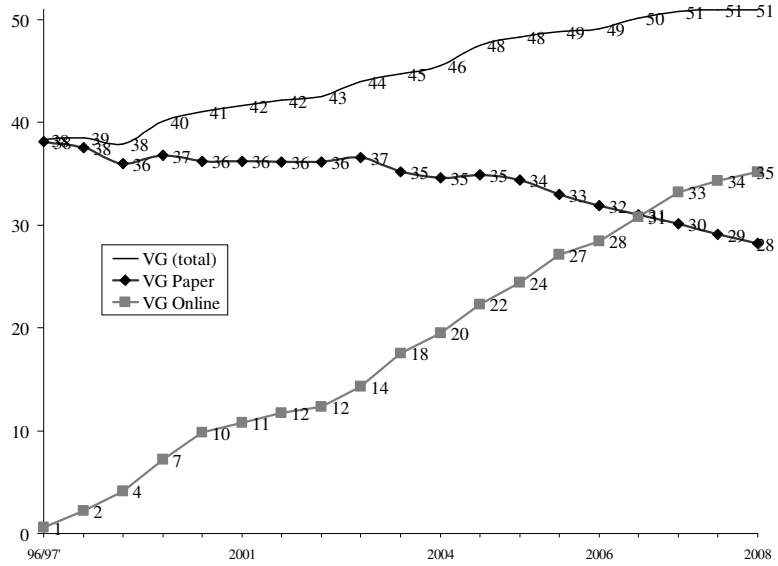
All national media and the largest local media in Norway are covered by the multimedia survey Consumer & Media (C&M). The largest and most of the media titles are measured by CATI. The multimedia index enables us to compare different media and media channels, and users can find data that enable them to carry out market descriptions and define target groups.

Access to and use of the Internet and use of major websites have been measured since 1996, and from 2010 the new NRS will be extended to cover all electronic newspapers. In recent years, there has been particular interest in analysing how the Internet competes with more traditional media. In 2009 we are measuring eighty Internet sites in C&M and are reporting daily and weekly reach every quarter to the market (Futsæter, 2009). The figures are also reported via the software Galileo twice a year. Using this software, media planners can design cross-media campaigns at a weekly and daily reach level. This is an important tool for traditional newspapers, whose paper editions are losing readership.

Since we started measuring online newspapers in 1996, we have found that these surveys have provided crucial strategic information that helps heads of Norwegian newspapers to tailor product development to different target groups.
Like most of the paper editions of newspapers in the EU and US, the largest national newspapers in Norway have seen a decline in readership figures in recent years (Meier, 2007). The reach of the paper edition of *VG*, which is the largest newspaper in Norway, has plummeted in the last four years and is now 26.7% compared to 37.4% in 1996 (C&M 97/1).

All online newspapers in Norway have grown rapidly. Figure 14 illustrates the growth for *VG* (total) as a percentage of the whole population. VG Online has increased from 1% in 1996/1997 to 37% in 2008/2009. Several Norwegian newspapers have seen their online editions show overall growth, but not as much as *VG*.

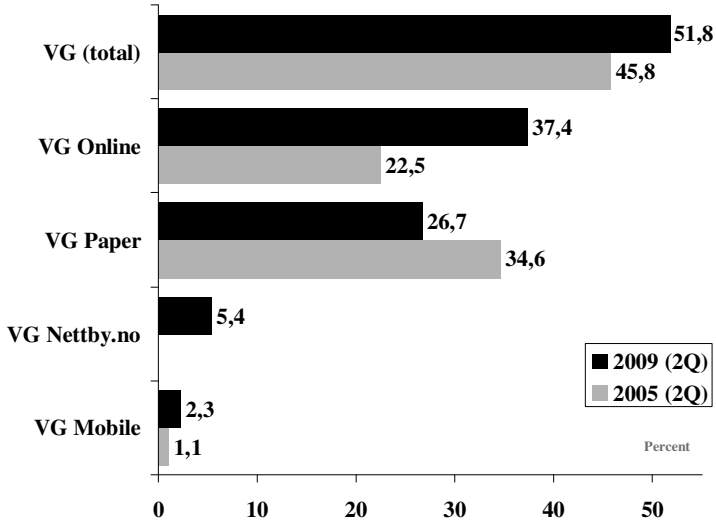
Figure 15. Changes in VG reach: Print vs. online



In 2005 we developed a syndicated way of measuring the use of mobile telephones for the largest content providers in the multimedia survey C&M, for which reason we were able to compare and combine figures for newspapers, radio, TV, Internet and mobile telephone content at a daily and weekly reach level. The figures for the media houses, at national as well as local levels, are reported quarterly by e-mail. We have also developed simple multimedia planning systems, including newspaper, magazine, TV, radio, Internet sites and mobile content, based on probabilities of contact with the media on an average issue/day.

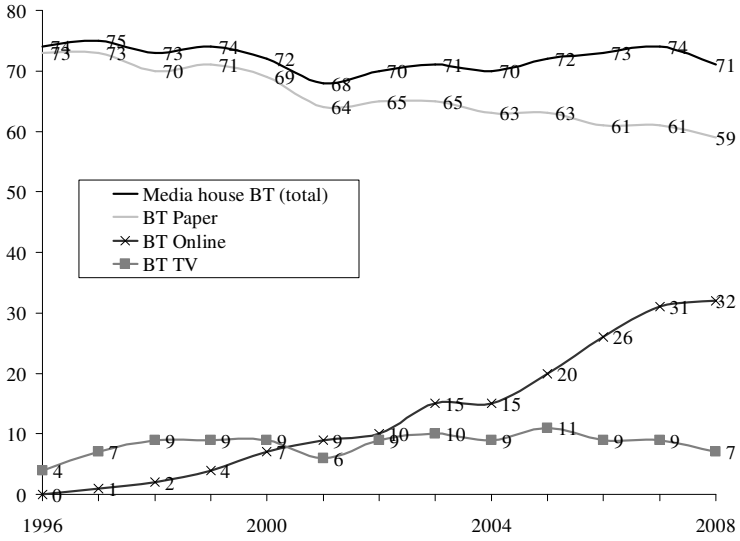
The media house VG is evidence that the same content can be distributed on several new platforms. Figure 15 shows that despite the printed editions' decline in readership, *VG* as a whole has a larger audience in 2009 than in 2005. Altogether, *VG* reaches 51.8% of the population every day. The online edition is by far the most popular medium, with a daily reach of 34.6%. This is followed by the printed paper with 26.7%. The Norwegian social networking sites *VG Nettby.no* has a reach of 5.4% and is very popular among teenagers. *VG Mobile* has a daily reach of 2.3% of the entire population and has doubled its audience since we started to measure mobile content in 2005. The mobile services encourage interactivity and even beat the Internet in bringing news to audiences first wherever they are, which is especially used by people on the move and whose mobile bills are paid by their employers.

Figure 16. Daily reach of the media house VG



Since we have been measuring daily reach for the newspaper, website and local TV station for *Bergens Tidende* from 1996, we have interesting historical figures for media performance separately and total reach for that media house. Like most newspapers in Norway, *Bergens Tidende* is also seeing declining readership figures for its paper edition, while the number of users for its online edition is increasing. However, print edition readership of local and regional papers is not declining as much as that of the national tabloids *VG* and *Dagbladet*. On the other hand, the online editions of local and regional papers are not growing as rapidly as those of the national tabloids.

Figure 17. Daily reach of the media house Bergens Tidende (BT)



6.2 A new multimedia concept for real multimedia planning

The need to plan campaigns across various media channels has gradually become stronger among advertisers, media agencies and media, particularly for national media and syndicates. One of the primary challenges is that the media operate with currency surveys that exist side by side – independently of one another. For determining the official currency, the individual media need to be measured differently in order to take into account each medium's uniqueness. Without a doubt, TV Meter and PPM will be the standard for measuring TV and radio for the foreseeable future. In the same way, data on weeklies/magazines, the Internet, mobile, outdoor, etc., need to be gathered and reported on their own terms. For that reason, a new multimedia concept needs to be constructed in a way that makes use of the various currency measurements. TNS Gallup proposes putting in place an open and flexible system where all the established media measurements can be linked together. In addition, we think that such a system needs to be based on a least common multiple of single source data, where all media are measured in the same way and where we are able to ascertain the relative strength between media in a uniform manner. One such system, for example, is the British TouchPoints initiative[i].

In spring 2009 the entire Norwegian media business, media agencies and advertisers agreed to start a joint project to arrive at a solution to this major challenge. TNS Gallup has submitted a proposed solution for doing this, where NRS and C&M are core elements. In 2011 we hope to be able to describe it and tell you how it went.

7 Summary

Based on the Norwegian *Media Effect Pyramid (MEP),* media agencies and advertisers have put pressure on newspapers to develop a more precise measurement *of readership than AIR* and to deliver more frequent and detailed reporting. To meet the demands TNS Gallup has developed extended currencies for newspapers and more frequent and detailed reporting of AIR figures and moved the newspaper currency to Level 3 of the *MEP.*

7.1 Retaining the main elements of the old NRS

The new NRS will retain all the core elements of the old NRS and C&M as they are today:

- official readership figures (AIR) for all 160 titles
- Pure Recent Reading (PRR) by CATI
- the readership figures will be linked to target group information
- measuring of Internet sites for newspapers, mobile services, local radio and local TV in the same survey
- multimedia analyses

7.2 More frequent and detailed reporting

The readership figures will be reported more often and in detail:

- quarterly reporting of readership figures from 2010 with 45,000 interviews
- monthly reporting of readership figures from 2013 with 60,000 interviews
- reporting by weekday, month and quarter

7.3 New content exposure probabilities

We are developing a system that in addition to the AIR figures for each measured newspaper will result in a set of respondent-level Content Exposure Probabilities (CEP). Implemented in the planning and analysis software, these CEPs will extend the newspaper currency from a strictly AIR-based currency, to a currency that yields a better estimate for how many and who will see an ad placed in a given newspaper. We are moving from an OTS for a newspaper to an OTS for an ad in a newspaper, thereby narrowing the gap between newspaper currency and TV, Radio and Internet currency – hence moving to Level 3 of the MEP.

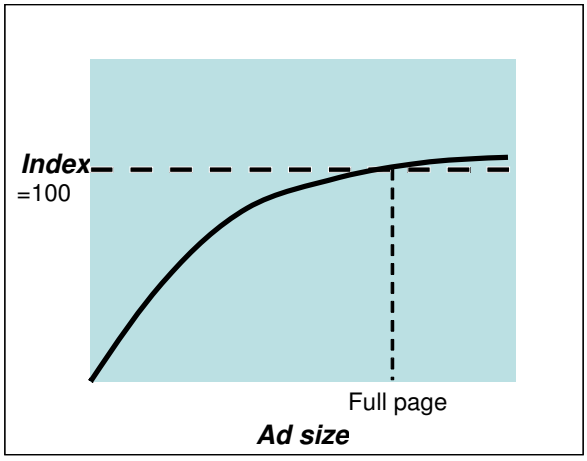
8 Future Perspectives

8.1 Ad Attentiveness Score

Even if the CEP methodology devaluates the readership figure as a measurement that indicates the "likelihood of seeing the spread", none of these methods will distinguish between various ad formats. Even though the new currency measurement will be far closer to actual reality, it will thus lack a component that adjusts for ad format and/or ad receptivity. If we are to get even closer to a "likely sees and ad" measurement, we can imagine two alternative possibilities for accomplishing this. Accordingly, this is to be regarded as an adjustment factor in addition to – and not instead of – the adjustment that has been made as described in this paper. We would call this measurement the "Ad Attentiveness Score" as it would provide a value for the extent to which the format of an ad or ad receptivity of a reader would have influence on the attentiveness for a given ad.

The first possibility we envisage is gathering results from all ad test databases that exist among Norwegian newspapers. This has gradually become a considerable number (several thousand) and may provide adequate robustness in average values for attentiveness for various format and, if applicable, colour combinations. However, the point is that it is not the actual attentiveness value we are looking for – which would bring the newspapers up to Level 4 of the pyramid – but rather the variation in response to various ad formats. For example, if we set a full-page ad at index 100, which would then be equal to the extended currency (cf. CEP), we then calculate the difference between a full-page ad and all smaller formats. We thereby obtain a response curve as illustrated in figure 18, which will also form the basis for calculations in planning software.

Figure 18. Example: Illustrated response curve for various ad formats



The other possibility is simpler and is based on adding 1-3 questions concerning receptivity to advertising in newspapers to the main survey. The questions will be asked of all respondents at a general level – i.e. not per newspaper title. This approach was also touched on by Ted D'Amico in his paper from WRRS in Vienna 2007.

Our recommendations to the newspapers were to initially implement the new extended currency based on Readership Engagement Score/Page Traffic and the CEP methodology, without any further adjustment for ad formats or ad receptivity. In the coming contract period we should also explore the possibility and consequences of also including an "Ad Attentiveness Score".

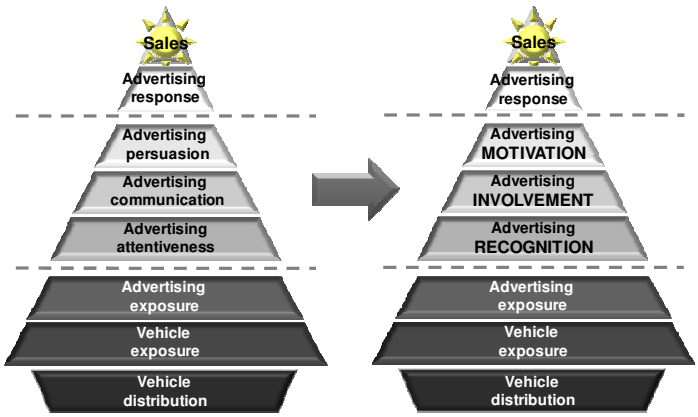
8.2 Further up the Media Effect Pyramid – completing the picture

Even though the responsibility of documenting effects further up the Media Effect Pyramid is not a media responsibility, we see that they eventually will engage themselves through various types of ad-effect studies. Therefore we have worked out a way to integrate media currency figures with TNS Gallup's approach to advertising testing. This approach is called AdEval^{TM} and is widely used with our clients. There are two major points we would like to explain about the advantage of this approach:

1. It goes beyond advertising recall or *recognition* (attentiveness) by identifying the advertisings ability to *involve* (communication) and *Motivate* (persuasion) the audience. Since the involvement dimension builds on top of recognition, and motivation builds on top of both recognition and involvement, we can easily take the results directly into the MEP.
2. When implementing results from an AdEval^{TM} ad-test into the MEP, it reveals the impact of the creative and the brand on the effects on each level in the MEP. This really helps to keep any confusion between media and communication effects separate, thus helping the newspapers to keep a more constructive dialogue with their clients.

Figure 19 shows how we can "translate" the results from an AdEval™ test into the MEP.

Figure 19. Completing the MEP with results from ad-testing

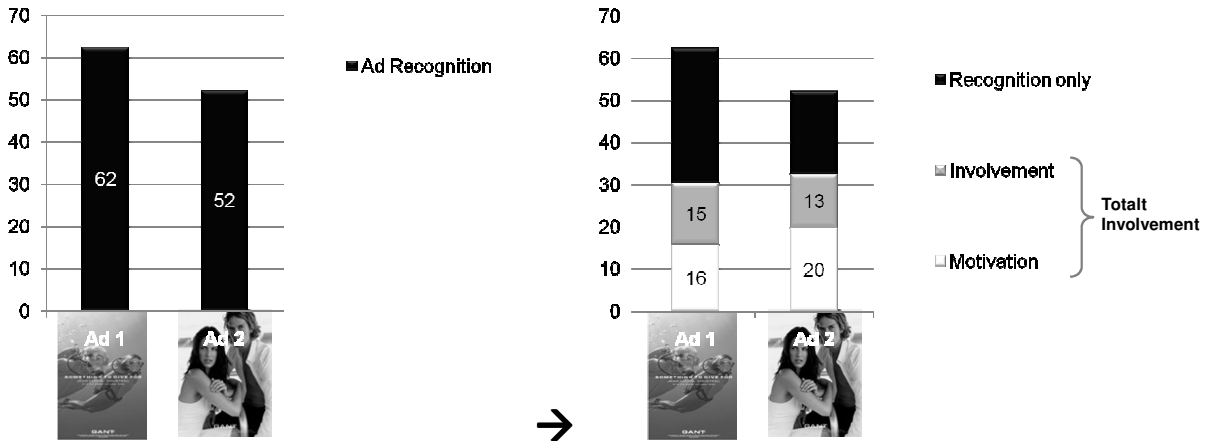


Our future perspective on this is to see how we can implement the vast amount of information that could be found in the newspapers ad-testing databases with the newspaper currency data. To illustrate this initiative and approach we have made an example with a case found in our ad-testing database. The ad in this example is for the same advertiser, and was tested in the same newspaper. The creative solution and the results it gained were however very different.

Figure 20. One brand – to different creative solutions

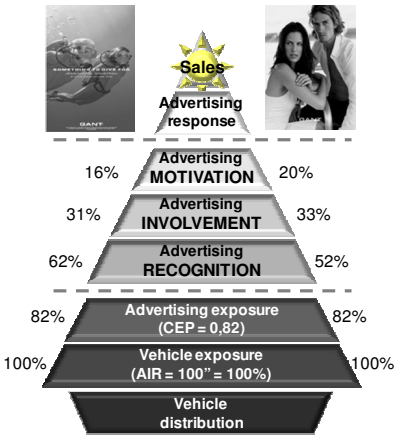
As you can see in figure 20 – the creative solutions for these ads where very different, hence we would not be surprised if the results would differ. The first level we can look at is to what degree the ads were recognized. Many advertisers and agencies look at recognition as the most important measure even though this is a very narrow view on advertising effectiveness. Ad recognition for the two ads is shown in the left hand side of figure 21. Also shown (on the right hand side) are the levels of involvement and motivation.

Figure 21. Ad Recognition and degree of involvement and motivation for the two ads



Ad1 outperforms Ad2 when looking at recognition. But advertising effects goes beyond recognition, and when looking at the more important measures like *involvement* and *motivation*, Ad2 outperforms Ad1. We would argue that Ad2 then is doing a better job for the brand than Ad1, and this can of course not be blamed on the newspaper. This becomes evident when implementing the figures in the Media Effect Pyramid like shown in figure 22.

Figure 22. Results from a case study implemented with MEP



When having the percentages you can easily calculate the effects in terms of actual number of peoples reached on each level of the MEP – from a current media plan to the level of advertising persuasion (motivation). In the illustrated case we could imagine a media plan that reaches 1 million people. This would give a difference on advertising persuasion of 40.000 peoples. For a clothing company this could represent significant lost potential in terms of t-shirts, jeans, jackets etc....

8.3 The NRS and the new multimedia concept

The new multimedia report will include daily reach for all measured media and total reach for media houses. All the data will also be available in the software Galileo where it would be possible to create simple multimedia plans based on probabilities of contact with the media on an average issue/day.

TNS Gallup will also construct a new multimedia planning system that addresses the respective currency measurements. In 2011 we hope to be able to describe it and tell you how it went.

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