

# GET THE BIGGER PICTURE

NRS PADD - MOBILE & TABLET



Stakeholder briefing  
17 September 2014





# AGENDA

INTRODUCTION

**SIMON MARQUIS**

CHAIR NRS



KEYNOTE: WHAT NEXT FOR  
TECH

**MATT WARMAN**

TECHNOLOGY EDITOR  
TELEGRAPH



A FIRST LOOK AT MOBILE

**KATHERINE PAGE**

TECHNICAL CONSULTANT NRS



SHAPING OUR VISION

**SIMON REDICAN**

CEO NRS







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An aerial, high-angle view of London, England, with a blue color overlay. The Tower Bridge is prominent in the lower-left quadrant, spanning the River Thames. The city's dense urban landscape, including numerous skyscrapers and residential buildings, is visible across the frame.

# WHAT NEXT FOR TECH MATT WARMAN

TECHNOLOGY EDITOR TELEGRAPH



A FIRST LOOK AT  
MOBILE  
**KATHERINE PAGE**  
TECHNICAL CONSULTANT NRS





# MEASURING MOBILE AUDIENCES

93 14  
149 113 126 57 39 60 218 147 207  
191 203 14 44 189 7 383103 216 60 129 236 14 55  
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# MEASURING PEOPLE NOT DEVICES



# MEASURING MOBILE AUDIENCES



- ▶ Plans to roll out tablet meters to panel
- ▶ Project Dovetail
- ▶ 2% of TV viewing time is on computer devices



- ▶ 6% of listening 'online/apps', but mobile not separate



- ▶ PC Website audiences included since 2012
- ▶ Now incorporating mobile audiences



# MEASURING MOBILE AUDIENCES

- ▶ Today you will have the first glimpse of the mobile data from comScore data incorporated into NRS PADD
- ▶ These are 'beta' data – there's lots more to do...

A photograph of two women in an office environment. In the foreground, a woman with short blonde hair and glasses is seated at a desk, typing on a laptop. She is wearing a dark blazer over a floral patterned top. In the background, another woman with dark hair tied back is standing and looking at a laptop. The entire image has a blue color overlay.

# NRS ASKS RESPONDENTS ABOUT PRINT AND DIGITAL READERSHIP



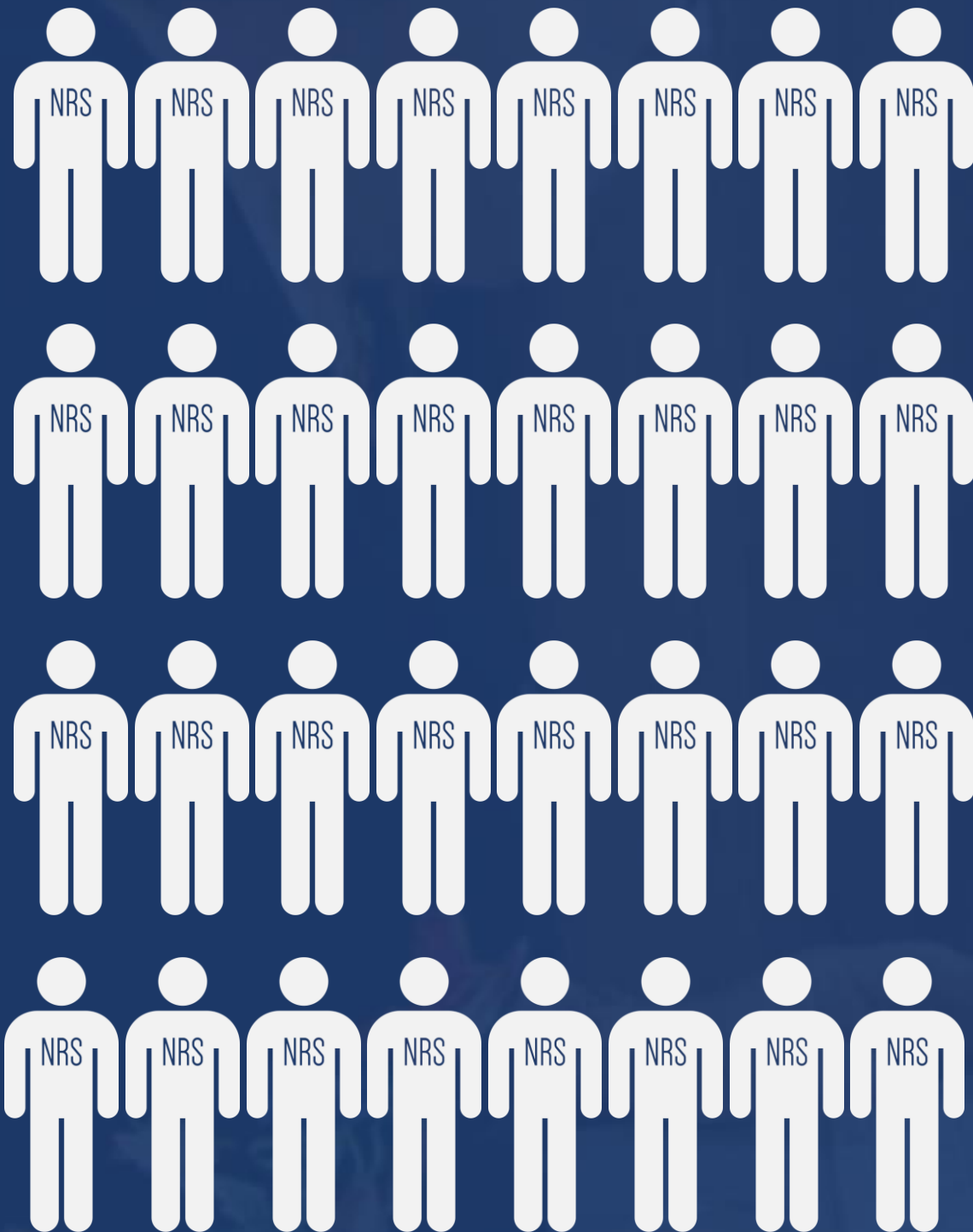
# WHY DOESN'T NRS JUST PUBLISH THOSE DIGITAL ESTIMATES?

- ▶ Respondents don't know/can't remember all their digital behaviour.
- ▶ Studies have shown respondents under-estimate the frequency of their digital behaviour – particularly for mobile.

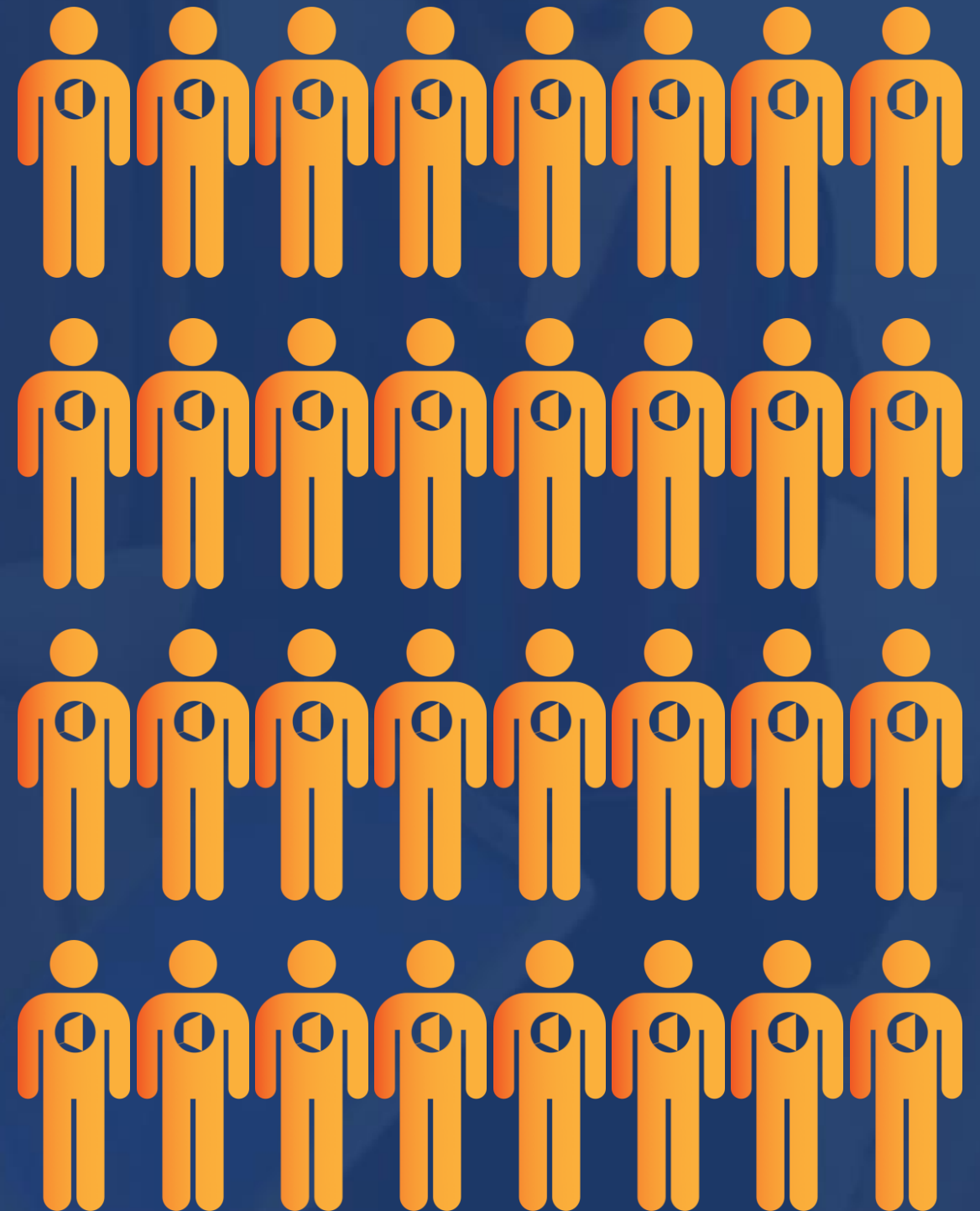


# STEP ONE: FUSION WITH THE comScore PANEL TO ADD AUDIENCE ESTIMATES FOR PC WEBSITES

NRS



comScore PANEL





# STEP TWO: ADJUST WHAT NRS RESPONDENTS CLAIM FOR MOBILE/TABLET TO MATCH comScore

## CONTROLS TO MATCH comScore BY:

- ▶ Age and gender
- ▶ Duplication of pc and mobile audiences

# NEWSBRANDS

IN THIS RELEASE

**Mail**Online

London  
**Evening  
Standard**Online

**METRO**

**The Telegraph**

  
**THE SCOTSMAN**  
SCOTLAND and SUNDAY

**THE**  **TIMES**

**theguardian**

The  **INDEPENDENT**

IN FUTURE RELEASES

**THE  
Sun**

**Mirror**

**Daily Record** AND SUNDAY MAIL 

 **EXPRESS**

**DAILY  
STAR**



# MAGAZINE BRANDS

## IN THIS RELEASE

 **GoodFood**

**TimeOut**

 **TopGear**

**WHATCAR?**

**COSMOPOLITAN**

**heat**  **world**

**EMPIRE**

**NME**

**GLAMOUR**

**RadioTimes**

## IN FUTURE RELEASES

**OK!**  
FIRST FOR CELEBRITY NEWS

 **NATIONAL  
GEOGRAPHIC**

**NewScientist**

**Men'sHealth**

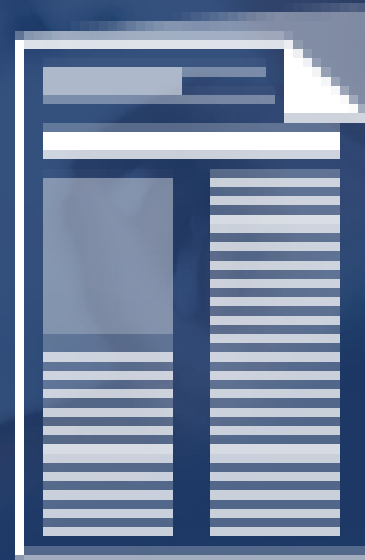
# COVERAGE OF DIGITAL READING

Checks within the questionnaire indicate NRS will cover the majority of digital reading (c.90%) as the brand estimates roll out.



# WHAT'S INCLUDED?

- ▶ Monthly audience estimates for mobile/tablet combined
- ▶ Each platform can be analysed separately or in combination:

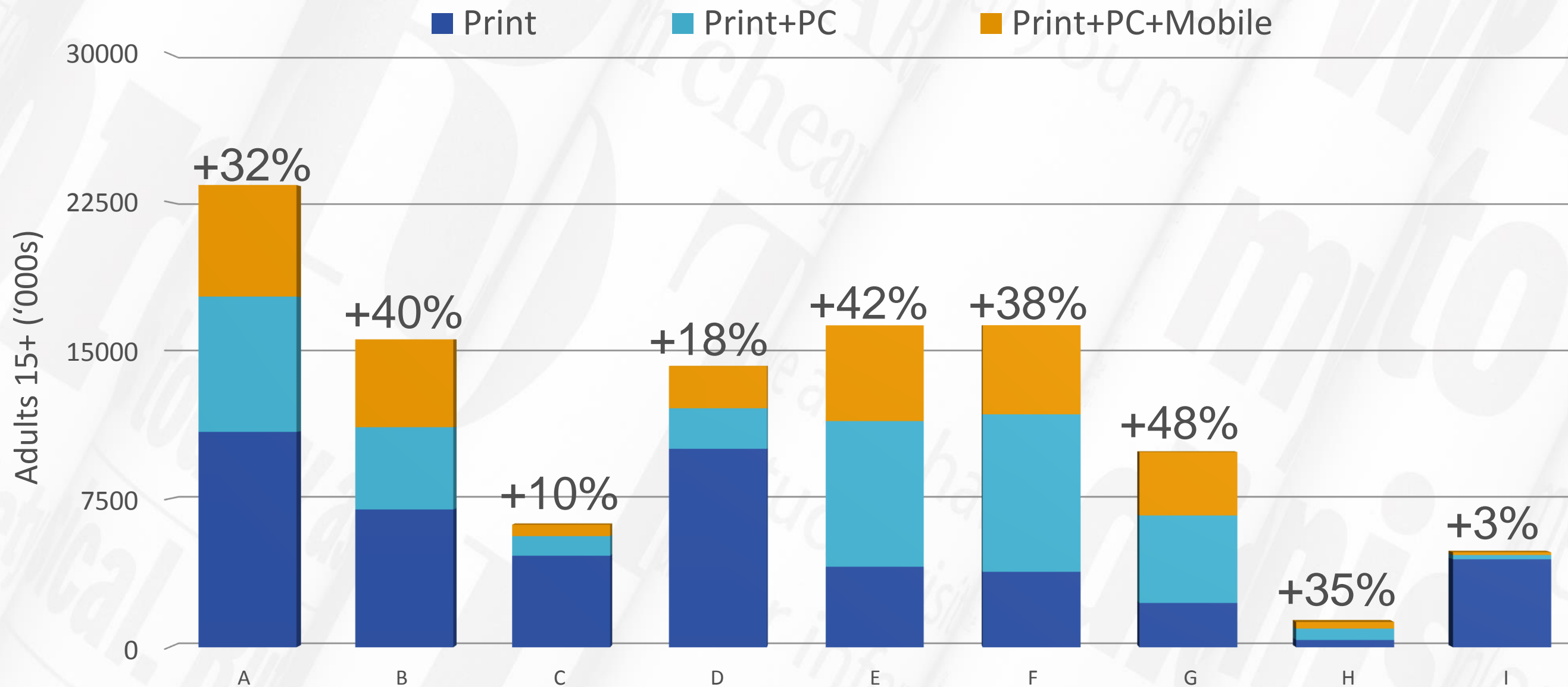


The background of the image is a collage of various newspaper clippings, including headlines like 'all reveal', 'to live', 'MAR', 'cheap', 'today as', 'dietical. Bu', 'he heck', 'and have', 'study visit', 'further inform', 'diagnosis', 'testosterone', and 'ch'. The text is in different fonts and sizes, creating a textured, layered effect. A solid blue overlay is applied to the entire background, making the white text stand out.

# THE BIGGER PICTURE FOR NEWSBRANDS



# MOBILE ADDS A FURTHER 31% TO AUDIENCE REACH FOR NEWSBRANDS



Source: NRS July 2013-June 2014 and comScore June 2014

FOR THESE BRANDS MOBILE AND PC  
INCREASES OVERALL AUDIENCE BY +36%



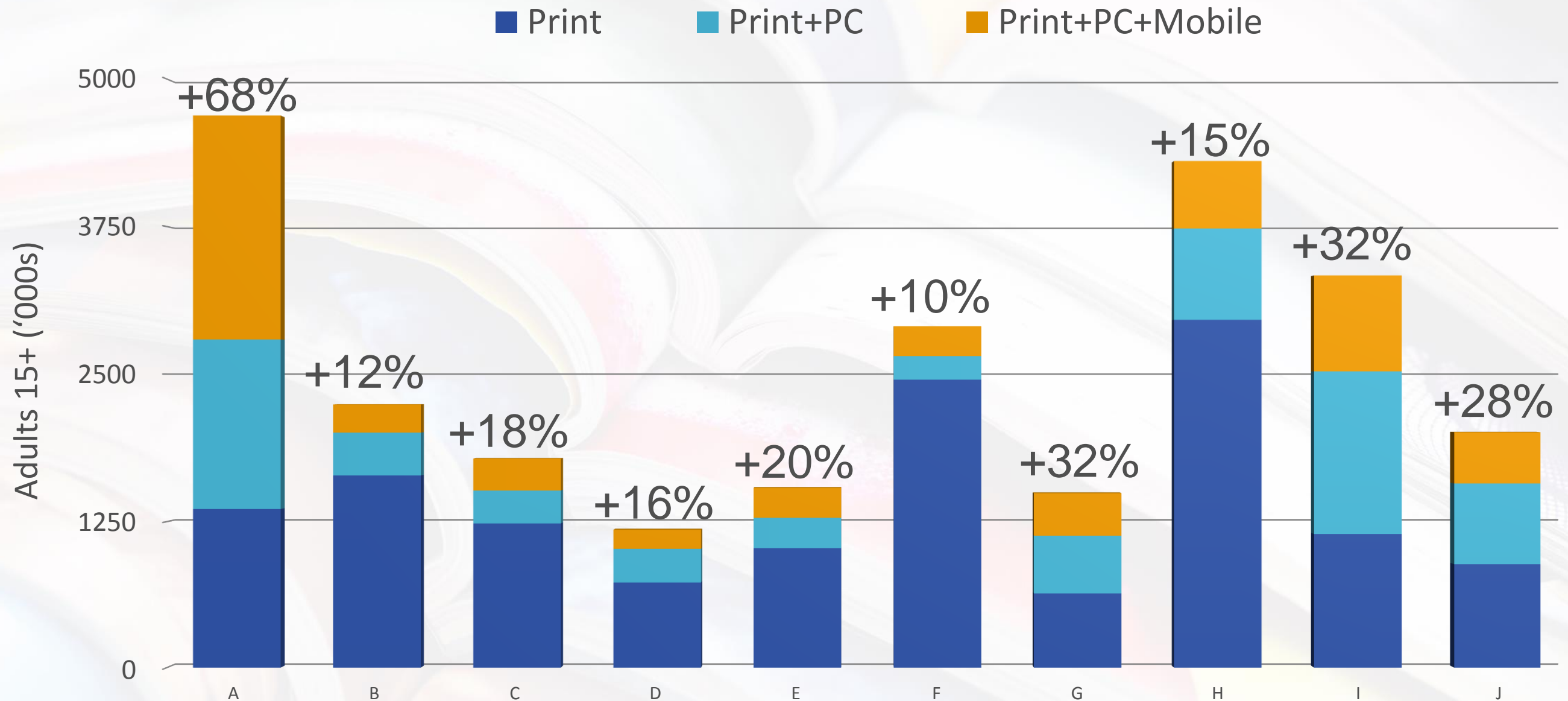
combined reach for these  
brands of 71% of the  
population



The background of the slide is a close-up, slightly blurred image of a stack of magazines. The spines of the magazines are visible, showing various colors and textures. A semi-transparent blue overlay covers the entire image, creating a uniform background for the text.

# THE BIGGER PICTURE FOR MAGAZINE BRANDS

# MOBILE ADDS A FURTHER 26% TO AUDIENCE REACH FOR MAGAZINE BRANDS



Source: NRS July 2013-June 2014 and comScore June 2014

FOR THESE MAGAZINE BRANDS MOBILE AND  
PC INCREASES OVERALL AUDIENCE BY +51%



combined reach for these  
brands of 31% of the  
population



# BETA DATA

- ▶ In 2015 comScore will use a new method to derive estimates for mobile and tablet.
- ▶ Different methods inevitably mean a change in the estimates.
- ▶ Estimates in NRS PADD will change to reflect this.

# BUILDING ON THE BETA DATA

NRS is scoping:

- Separate estimates for tablet
- Full reach and frequency planning for mobile
- More detail in NRS PADD

The digital industry data from comScore do not allow for weekly and daily estimates for mobile:

- A priority for publishers

# MEASURING DIGITAL READERSHIP

WHAT'S HAPPENING AROUND THE WORLD?

Everyone is looking for the complete solution across platforms





# MEASURING DIGITAL READERSHIP

## THE OPTIONS

### Ask respondents

- better than nothing but “not for media planning”

### Fusion with digital estimates from other suppliers



- how good are those estimates?
- lack of suitable audience data for mobile

### Set up passive measurement to deliver what's required

- whose responsibility?

# THE BIGGER PICTURE

- ▶ Mobile adds on average +27% to these individual brand footprints.
- ▶ There are 1.3 million mobile visitors not already accessing publisher content via print or PC.
- ▶ Across a month, 92% of adults are reached by news or magazine brand content.

SHAPING OUR VISION  
**SIMON REDICAN**  
CEO NRS







# SHAPING OUR VISION



## MediaWeek **Subscribe now for unrestricted access**



## NRS September 2009: Telegraph and Indy shed more readers

by John Reynolds, 27.11.2009

**LONDON** - The Daily Telegraph and The Independent were the only daily national newspapers to suffer double-digit year-on-year declines in readership, according to the latest National Readership Survey.

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ONLINE THE LATEST SCHOOL GCSE LEAGUE TABLES IN FULL [TELEGRAPH.CO.UK/EDUCATION](http://TELEGRAPH.CO.UK/EDUCATION)

## The Daily Telegraph



### IS THIS THE WORLD'S CLEVEREST CHILD?

FEATURES PAGE 22

Thursday, January 15, 2009

BRITAIN'S BEST-SELLING QUALITY DAILY

No 47,700 90p

### Dismay as minister 'sees the

Consider yourself a record-breaker, Oliver!



### 100,000 fail to get a good GCSE



**Free** strawberry collection Worth £9.99 PLUS DELIVERY SEE PAGE 25



Comment

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News UK City of London

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News UK City of London

#### Senior Sales Executive

GDS International Bristol, City of Bristol

#### Sales Executive (digital, B2B)

Spiceworks Central London

#### Business Development Manager:

Beauty4Media & Homes4Media

News4Media Limited London (Greater)

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Prisma

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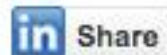
**MediaWeek** Subscribe now for unrestricted access



## NME's unduplicated print and online reach put at 1.4 million

by Daniel Farey-Jones, 12.09.2012

The first data for the unduplicated reach of magazine brands across print and websites reveal wide differences between titles, with NME's massive online audience giving it a reach comparable to bigger-selling print weeklies such as Grazia and Nuts.



### MediaWeekjobs.co.uk

#### Sales Executive, Recruitment

News UK City of London

#### Senior Sales Exec, Grad Recruitment

News UK City of London

#### Senior Sales Executive

GDS International Bristol, City of Bristol

#### Sales Executive (digital, B2B)

Spiceworks Central London

#### Business Development Manager:

Beauty4Media & Homes4Media

News4Media Limited London (Greater)

#### Search for more media jobs

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Prisma







News UK

The Telegraph



DMGT

Guardian Media Group  
gmg

Mirror Group  
Newspapers



CITY A.M.  
—BUSINESS WITH PERSONALITY—

HEARST  
magazines

Time Inc.



MEDIACOM

maxus



phd



Vizeum initiative

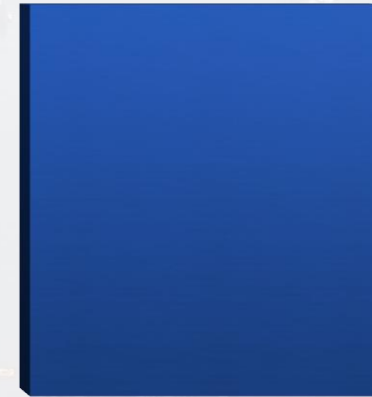
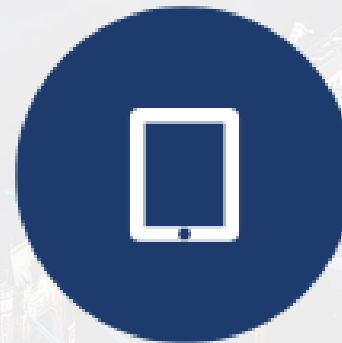
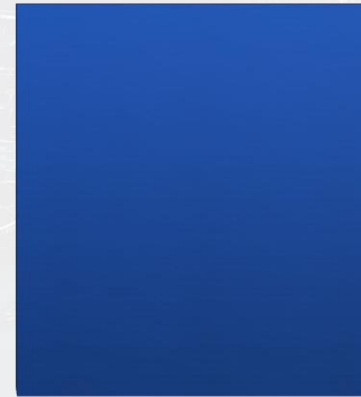
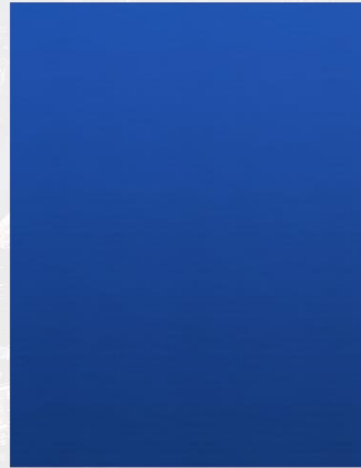
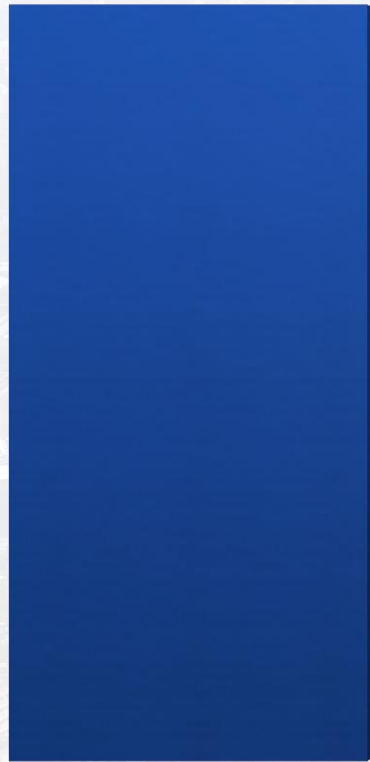


NPA



JICREG















The Voice  
of British  
Advertisers



NPA



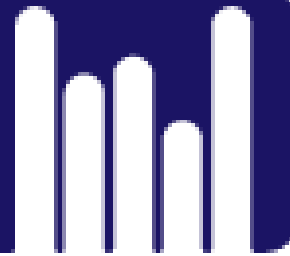
glanvill  
&Co





**JICREG**

National  
Readership  
Survey



**BARB**

BROADCASTERS' AUDIENCE RESEARCH BOARD



**JIC WEBS**

**rajar**  
Audio measurement



# THE NRS LTD TEAM



SIMON  
MARQUIS  
CHAIRMAN



SIMON  
REDICAN  
CHIEF EXECUTIVE



ALISON FINCH  
DIRECTOR OF INSIGHT  
AND CLIENTS



KATHERINE  
PAGE  
TECHNICAL  
CONSULTANT



SHARON  
FORDE  
OFFICE  
MANAGER



DAVID HART  
RESEARCH MANAGER



DAPHNA  
JOSEPH  
CLIENT SERVICE  
ACCOUNT MANAGER



MATT SALANDY  
CLIENT SERVICES  
ACCOUNT MANAGER



REGULAR BOARD  
MEETINGS



TECHNICAL  
COMMITTEE &  
USER ADVISORY PANEL



TRAINING











# VOGUE

OCT  
\$4.00

**CHERYL'S  
FRESH  
START**

*Exclusive  
update*

**Brush on**  
CAN YOU LIVE  
WITHOUT  
MASCARA?

**UNTAMED**  
*Fashion gets  
wild for winter*

*Pure  
Style*

**The  
return  
of 60s  
glamour**

**OFFICE  
CHIC**

*New weekday  
wardrobe*

**What it  
takes to get a  
supermodel's  
body**

Let  $S$  be the set of explored nodes with downlink route constructed  
Initially  $S = g \cup V_{AP}$   
Initially for each AP  $i$  in  $S$ , set  $G_i = (\{g \cup i\}, \{e_{g,i}\})$  and  $R_i = G_i$

**while**  $S \neq V$  **do**

Find  $S' \subseteq V-S$ :  $\forall v \in S'$ ,  $v$  has at least two edges from  $S$

//  $S_r$  is the reliable node set in  $S'$ , initially  $S_r = \emptyset$

**if**  $S' \neq \emptyset$  **then**

for all nodes  $v \in S'$  **do**

for all edge pairs  $(e_{u1,v}, e_{u2,v})$  from  $S$  **do**

$\underline{h}_{u1,u2} = (\underline{h}_{u1} + \underline{h}_{u2})/2$

**end for**

Find  $P_v$ , set of edge pairs of  $v$  satisfying  $C1 \wedge (C2 \cup$

**if**  $P_v \neq \emptyset$  **then**

$S_r = S_r \cup \{v\}$

Choose  $(e_{u1,v}, e_{u2,v})$  from  $P_v$  with min  $\underline{h}_{u1,u2}$

**else**

Choose  $(e_{u1,v}, e_{u2,v})$  from  $S'$  with min  $\underline{h}_{u1,u2}$

**end if**

$\underline{h}_v = \underline{h}_{u1,u2} + 1$

**end for**

**if**  $S_r \neq \emptyset$  **then**

Add  $v$  in  $S_r$  with min  $\underline{h}_v$  to  $S$

**else**

Add  $v$  in  $S$  with min  $\underline{h}_v$  to  $S$

**end if**

ConstructDG( $G, u_1, u_2, v$ );

**else**

Find  $S'' \subseteq V-S$  and  $\forall v \in S''$ ,  $v$  has one edge  $e_{u,v}$  from  $S$

**if**  $S'' \neq \emptyset$  **then**

for all node  $v \in S''$  **do**

$\underline{h}_v = \underline{h}_u + 1$

**end for**

Add  $v$  to  $S$  with min  $\underline{h}_v$

$G_v = (\{u \cup v\}, \{e_{u,v}\})$

$R_v = R_u \rightarrow G_v$

**else**

return FAIL;

**end if**

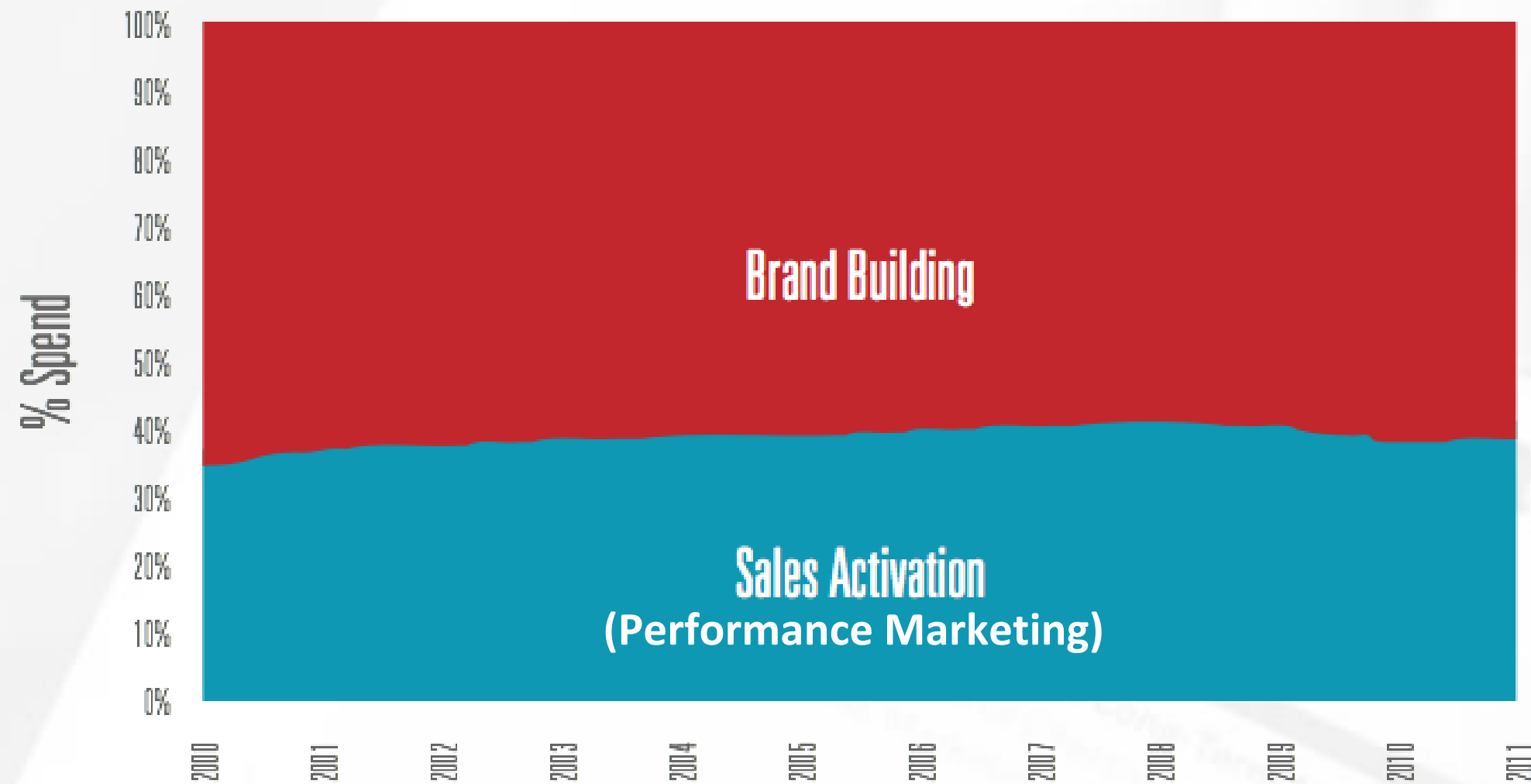
**end if**

**end while**

return SUCCESS



# BRAND BUILDING REMAINS CRUCIAL FOR ADVERTISERS



Source: 'The Long and the Short of It' – IPA Databank







# WE RECOGNISE THAT THE INDUSTRY WANTS

- ▶ REACH & FREQUENCY BY PLATFORM
- ▶ WITHIN A WIDER PLANNING INTERFACE
- ▶ ENGAGEMENT/INFLUENCE



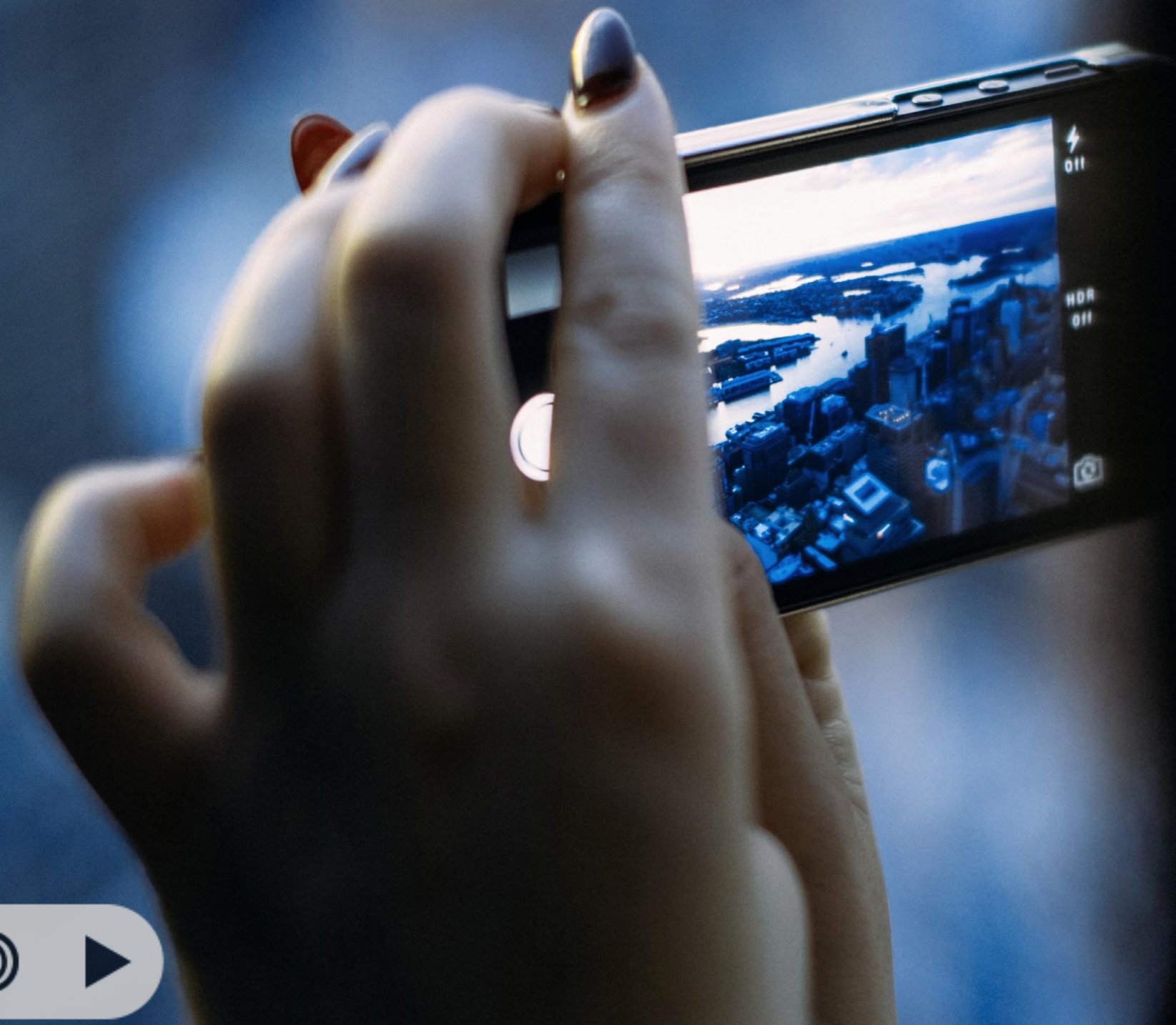








# GET THE BIGGER PICTURE



THANK YOU

