



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 view of a city skyline, likely London, with a prominent bridge (Tower Bridge) visible. The image is overlaid with a semi-transparent blue filter. The text is centered on the left side of the image.

WHAT NEXT FOR TECH
MATT WARMAN

TECHNOLOGY EDITOR TELEGRAPH

A FIRST LOOK AT
MOBILE
KATHERINE PAGE
TECHNICAL CONSULTANT NRS



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. The woman on the left is seated at a desk, wearing glasses and a dark top with a floral pattern, and is looking at a laptop. The woman on the right is standing, wearing a blue and red striped top, and is also looking at a laptop. The entire image has a blue tint. Overlaid on the image is the text 'NRS ASKS RESPONDENTS ABOUT PRINT AND DIGITAL READERSHIP' in white, bold, uppercase letters.

NRS ASKS RESPONDENTS ABOUT PRINT AND DIGITAL READERSHIP

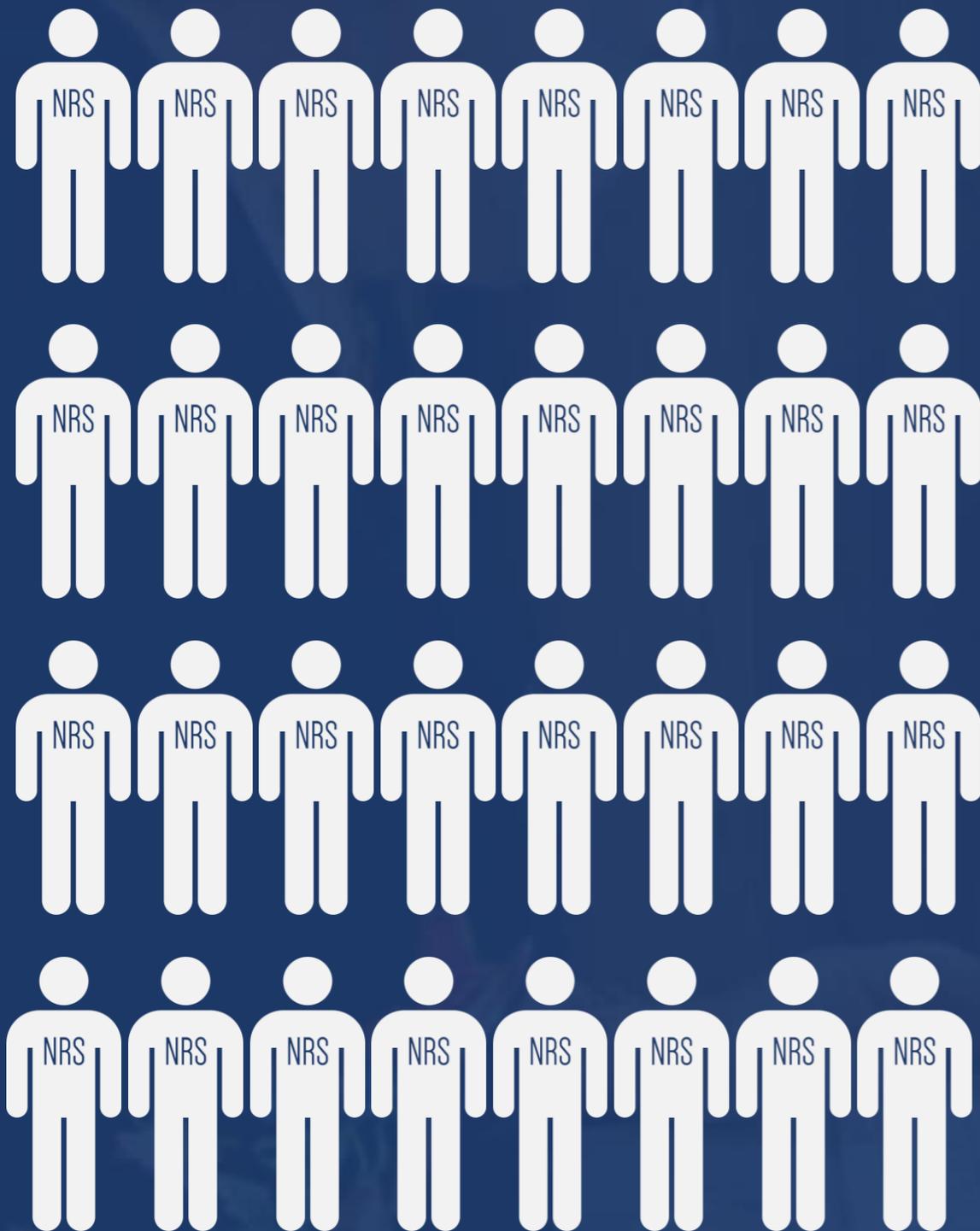
WHY DOESN'T NRS JUST PUBLISH THOSE DIGITAL ESTIMATES?

- ▶ 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.

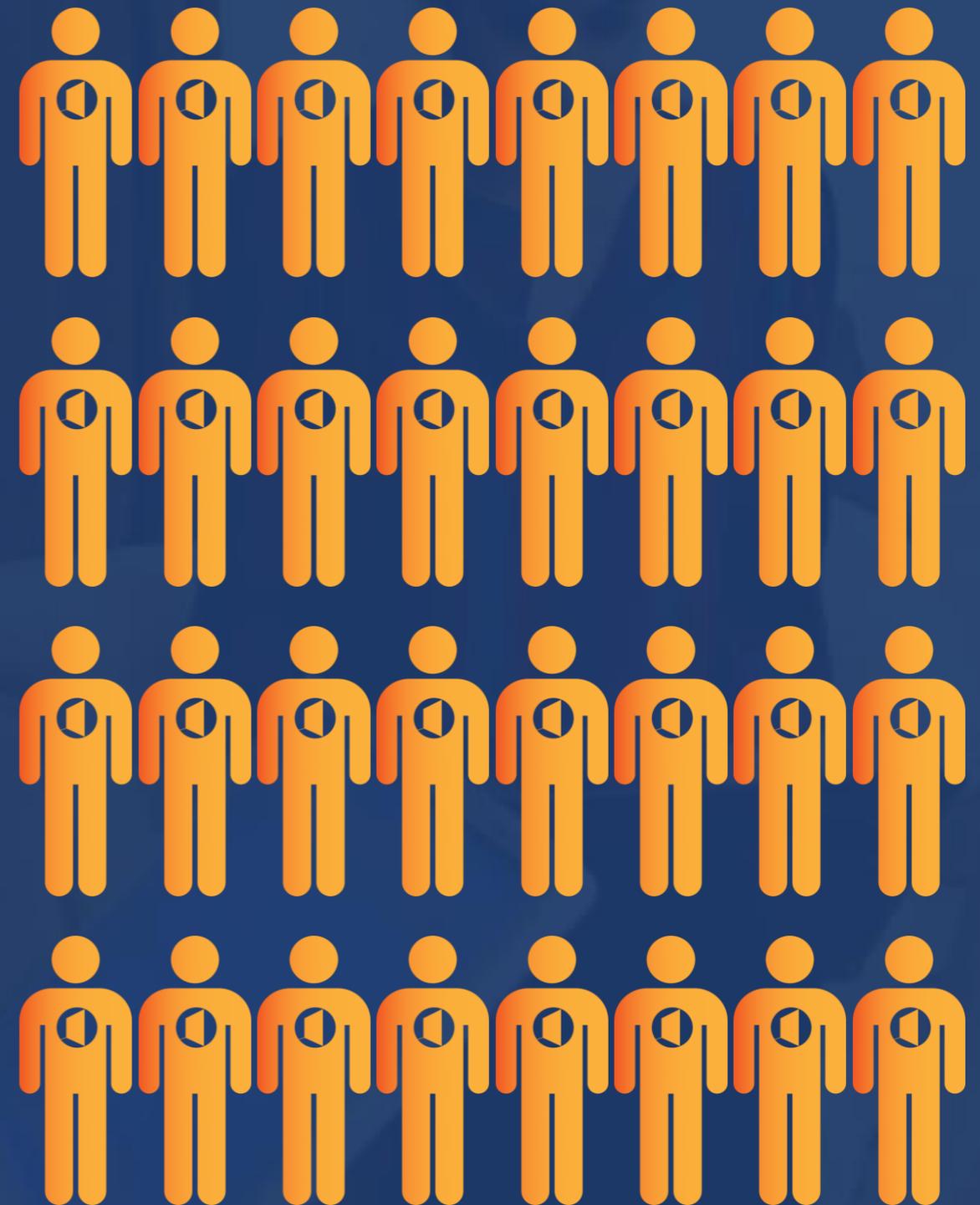


STEP ONE: FUSION WITH THE comScore PANEL TO ADD AUDIENCE ESTIMATES FOR PC WEBSITES

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

MailOnline

London
**Evening
Standard**Online

METRO

The Telegraph


THE SCOTSMAN
SCOTLAND  SUNDAY

THE  TIMES

theguardian

The  **INDEPENDENT**

IN FUTURE RELEASES

**THE
Sun**

Mirror

Daily Record  AND SUNDAY MAIL

 **EXPRESS**

**DAILY
STAR**

MAGAZINE BRANDS

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TimeOut

 **TopGear**

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COSMOPOLITAN

heat  **world**

EMPIRE

NME

GLAMOUR

RadioTimes

IN FUTURE RELEASES

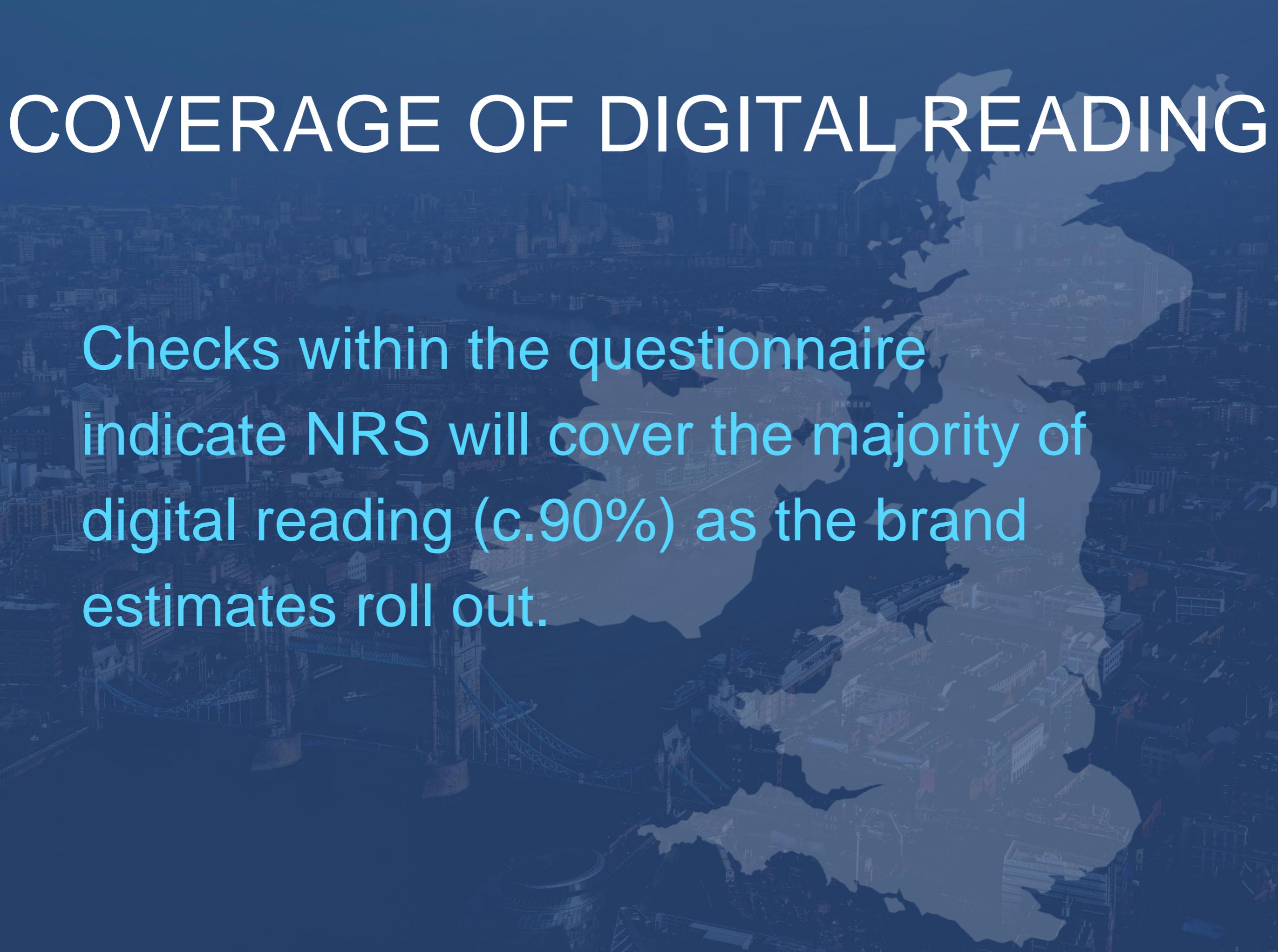
 **OK!**
FIRST FOR CELEBRITY NEWS

 **NATIONAL
GEOGRAPHIC**

NewScientist

Men'sHealth

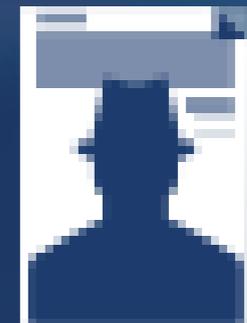
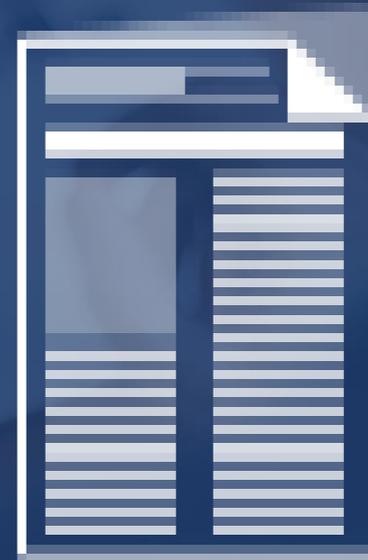
COVERAGE OF DIGITAL READING

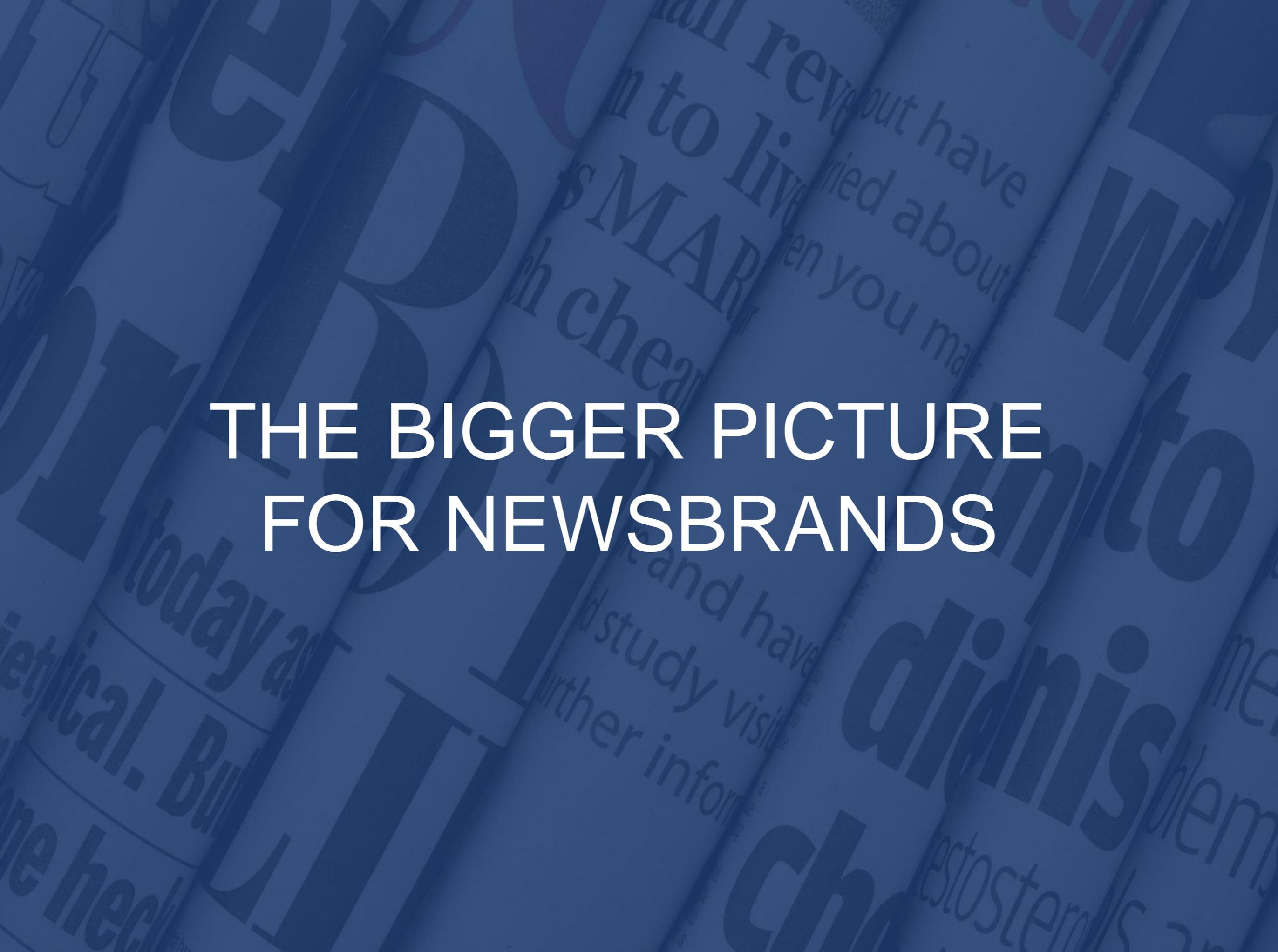


Checks within the questionnaire indicate NRS will cover the majority of digital reading (c.90%) as the brand estimates roll out.

WHAT'S INCLUDED?

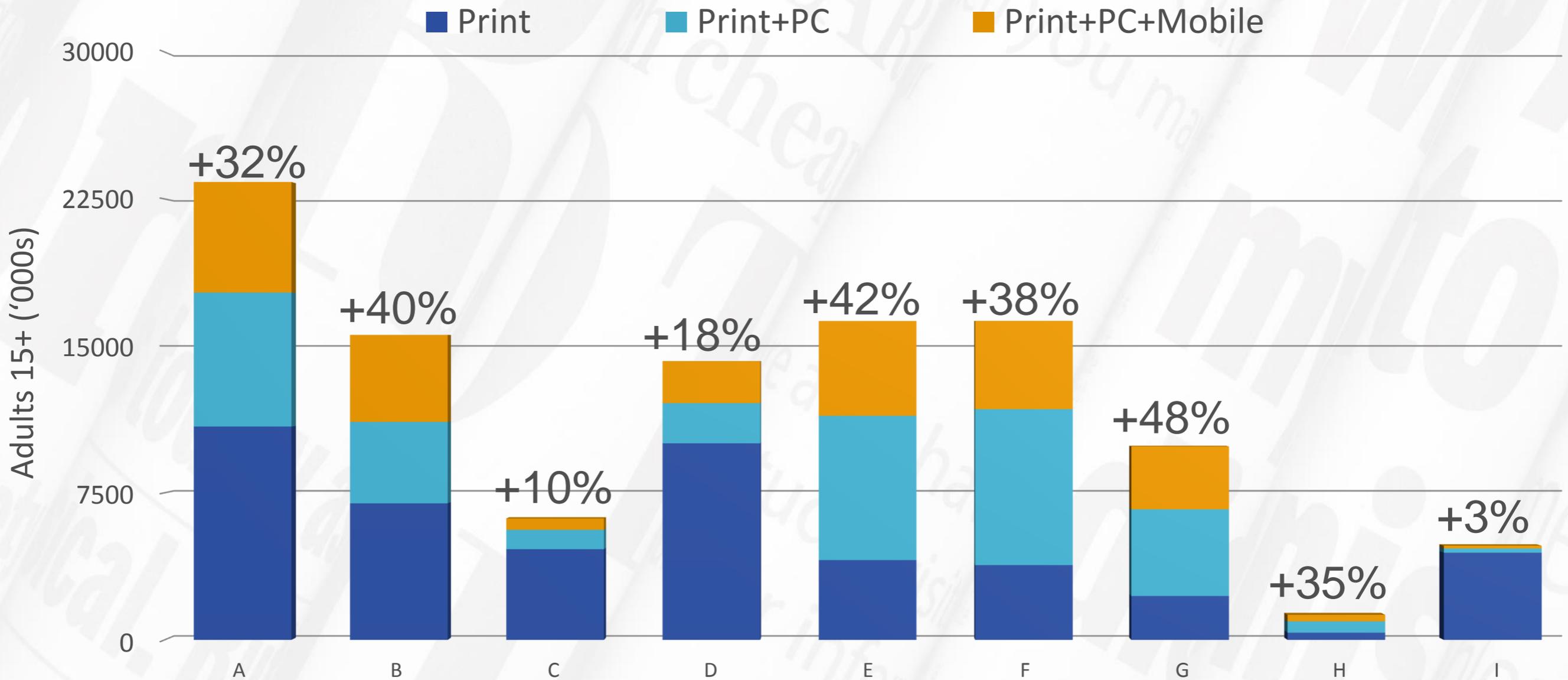
- ▶ Monthly audience estimates for mobile/tablet combined
- ▶ Each platform can be analysed separately or in combination:



The background of the image consists of a dark blue gradient overlaid with a pattern of faint, semi-transparent newspaper text. The text is oriented diagonally and includes various words and phrases such as 'all revealed', 'to live', 'MARRIAGE', 'cheat', 'today as', 'diagnosis', 'study visit', 'further information', 'testosterone', 'ch', 'the heck', 'today as', 'diagnosis', 'study visit', 'further information', 'testosterone', 'ch', 'the heck', 'today as', 'diagnosis', 'study visit', 'further information', 'testosterone', 'ch', 'the heck'.

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%

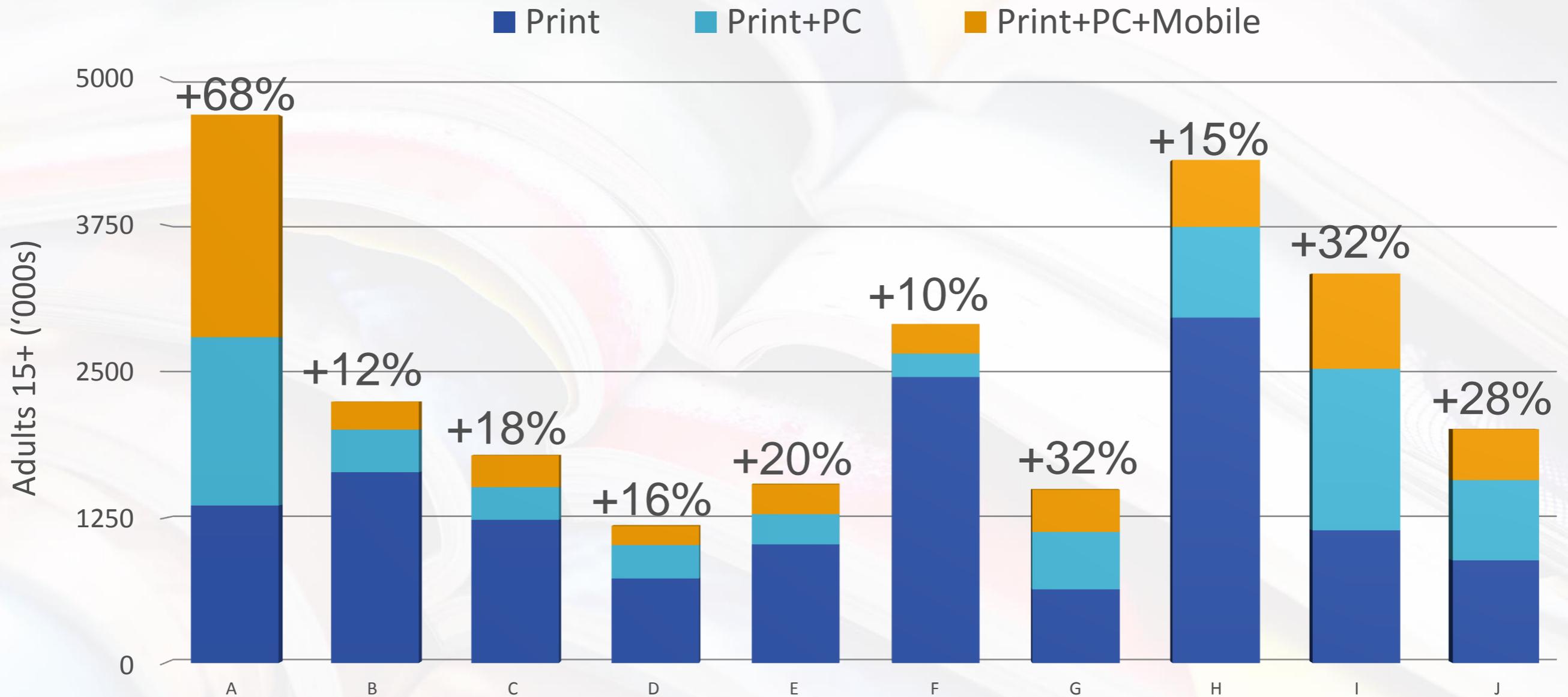


combined reach for these
brands of 71% of the
population

A stack of magazines is shown from a top-down perspective, slightly angled. The pages are white and the covers are various colors, including shades of blue, red, and yellow. A semi-transparent blue overlay covers the entire image, creating a monochromatic effect. The text is centered in white, bold, sans-serif font.

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.

93 14
149 113 126 57 39 60
218 147 207 191 203 14 44
189 7 38 102 216 60 129 236 14 55
229 182 183 109 71 163 204 20 115 59
250 15 250 144 240 97 187 118 175 5 24
100 4 148 197 11 11 5 26 7 156 153 158
160 9 188 139 106 15 201 35 85 19 4 174 5
62 170 70 177 148 45 46 28 226 204 172 2 170
187 62 105 76 178 24 170 41 170 203 230 153
245 41 90 239 98 111 150 18 295 255 173
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240 250 195 2 69 196 212 144 118 140 7 249 15
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46 28 127 2 79 156 154 54 254 15 1 34 165
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32 138 152 118 208 247 255 254 207
141 206 147 64 250 14 53 40 227
78 160 25 48 201 158 38 121 110 208
231 54 167 11 34 11 239 27 119
103 150 116 24 96 31 61 250 22 109
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4 24 228 227 2 164 10 63 53 173 210
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166 75 80 166 80 33 154 4 68 164 188 135 158 144 138 127 76 15 248 98 130 20 91 46 65 49 168 52 107 177 164 37 215 93

SHAPING OUR VISION

SIMON REDICAN

CEO NRS



SHAPING OUR VISION



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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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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 £999 P&P REQUIRED SEE PAGE 25



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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.

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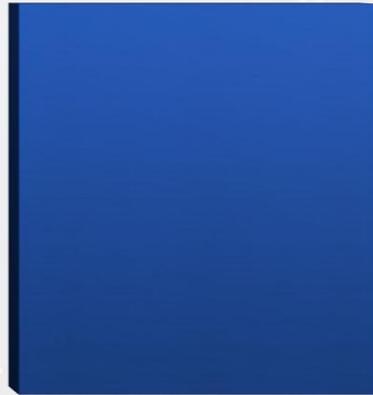
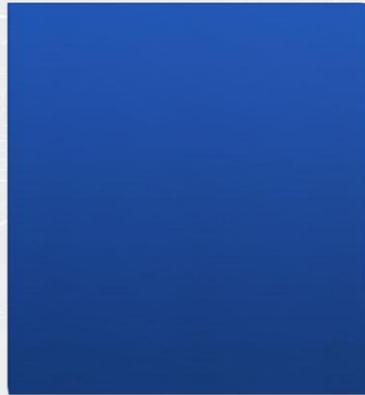
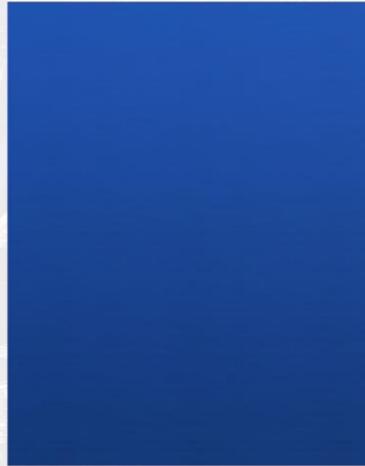
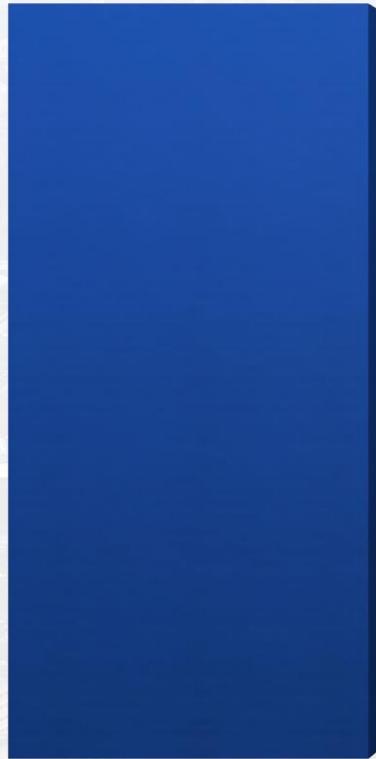
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aop | Association of Online Publishers







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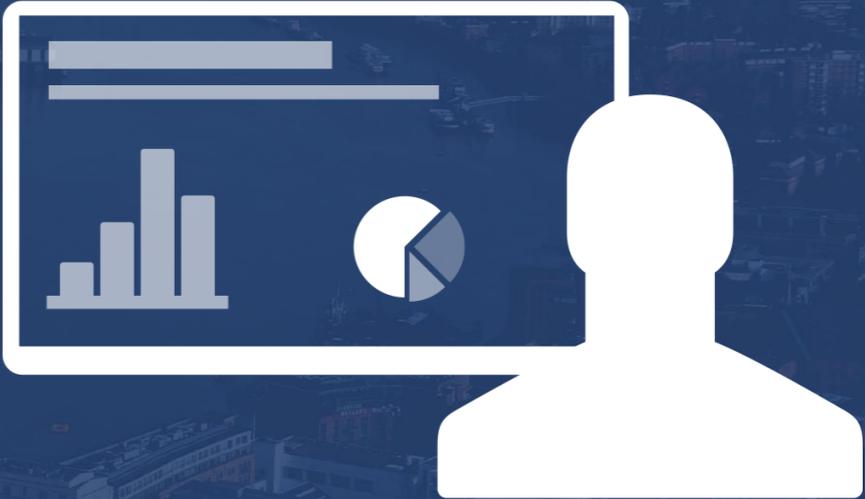
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MEETINGS



TECHNICAL
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USER ADVISORY PANEL



TRAINING







VOGUE

oct
14, 2010

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

UNTAMED
*Fashion gets
wild for winter*

**Pure
Style**

**The
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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 $(e_{u_1,v}, e_{u_2,v})$ from S **do**

$\underline{h}_{u_1,u_2} = (\underline{h}_{u_1} + \underline{h}_{u_2})/2$

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 $(e_{u_1,v}, e_{u_2,v})$ from P_v with $\min \underline{h}_{u_1,u_2}$

else

 Choose $(e_{u_1,v}, e_{u_2,v})$ from S' with $\min \underline{h}_{u_1,u_2}$

end if

$\underline{h}_v = \underline{h}_{u_1,u_2} + 1$

end for

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

 Add v in S_r with $\min h_v$ to S

else

 Add v in S with $\min h_v$ 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

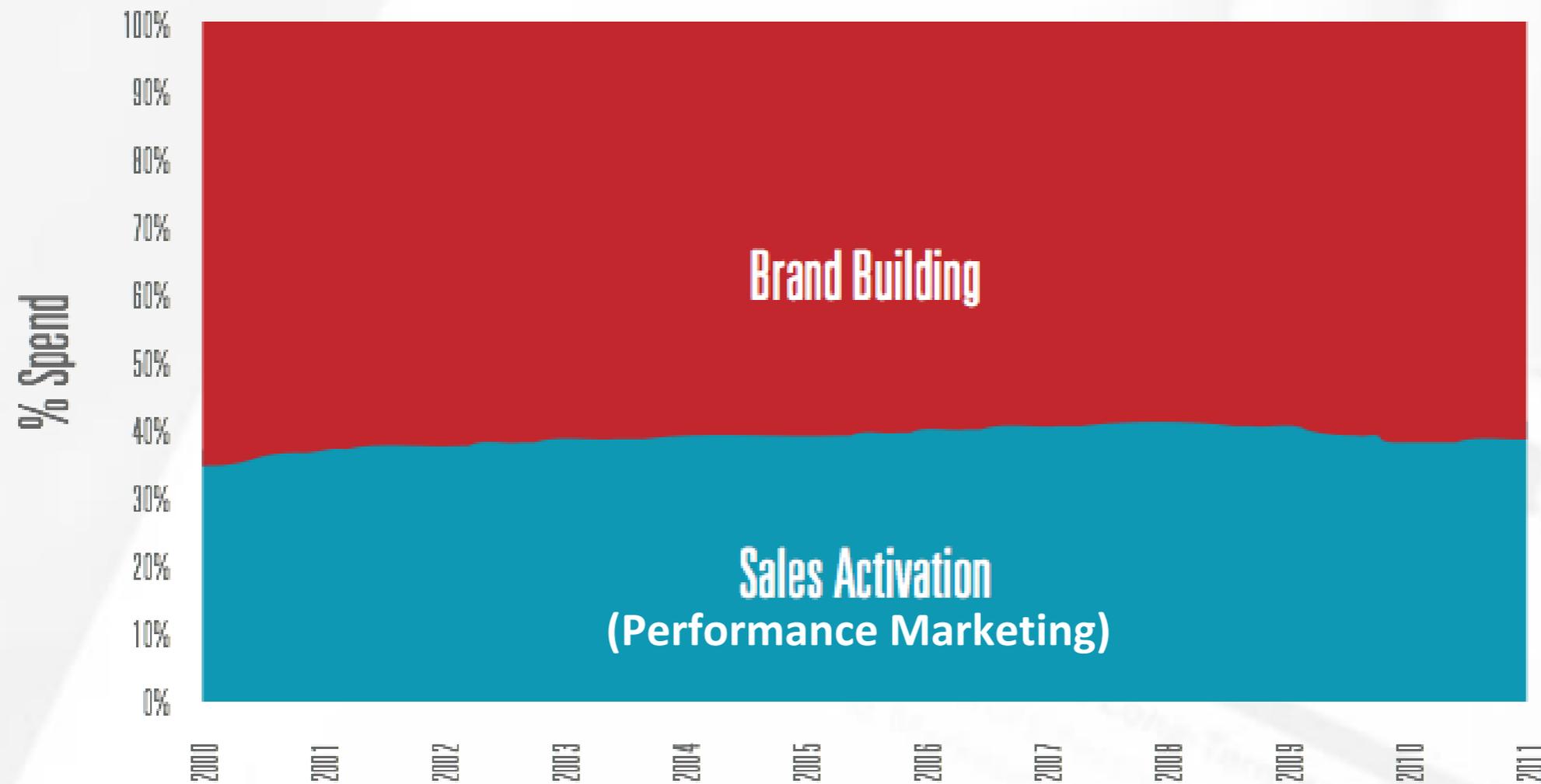
 return FAIL;

end if

end 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

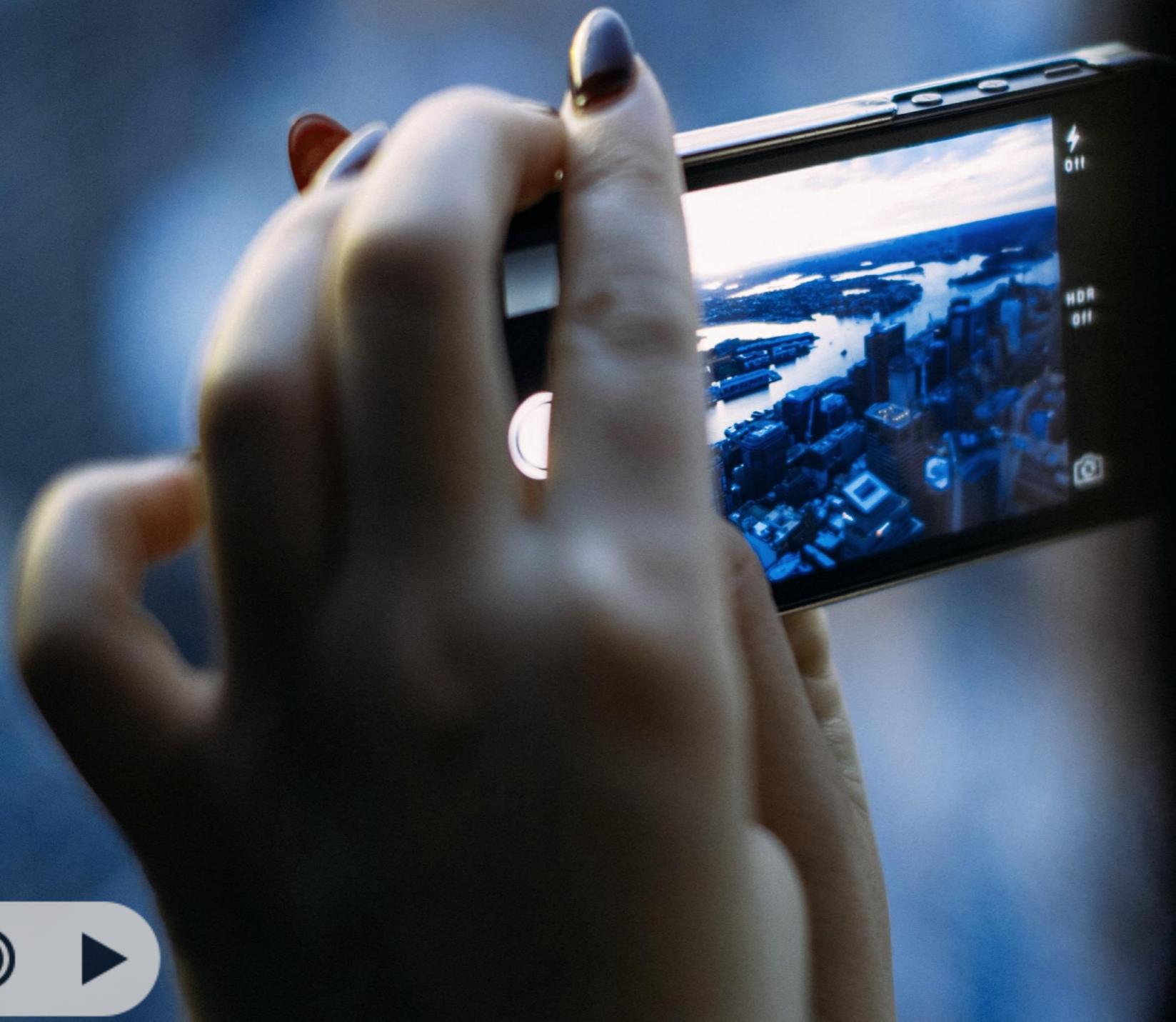
- ▶ REACH & FREQUENCY BY PLATFORM
- ▶ WITHIN A WIDER PLANNING INTERFACE
- ▶ ENGAGEMENT/INFLUENCE







GET THE BIGGER PICTURE



THANK YOU

