

Measuring total readership in the Middle East

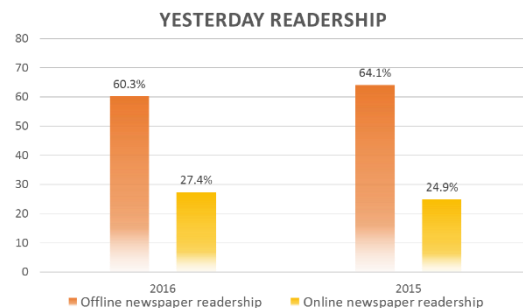
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Over the past decade, the digital revolution has impacted the media industries everywhere and resulted in substantial growth in digital audiences in all media. It has clearly affected people's every day media consumption habits. When media planners think about campaign reach, they no longer wish only to look at the reach of 'traditional' media; cross-platform insights are critical. For market researchers like Ipsos, this has given us a clear mandate to track readership online and via mobile devices, as well as in print.

According to data from the World Association of Newspapers published in 2016, the vast bulk of newspaper revenues continue to originate from the printed product – 92% for the year 2015. This has obviously fallen since then and will continue to do so, but it remains the case that print revenues are still very important to publishers.

The number of adults reading newspapers in print reached 2.7 billion globally in 2016. Around 40% of global internet users read newspapers online. In the USA, *Scarborough* data from two years ago, indicated that more than half of those reading newspapers in the USA only read printed copies. In Australia, more than 40% only read in print, while around a third do so in the Netherlands. Readership worldwide no longer depends only on print, but digital revenues have yet to replace those lost to the printed product.



In the Arab world, and particularly in the countries of the Gulf Cooperation Council or GCC (including Saudi Arabia, Bahrain, the UAE, Oman, Yemen, Qatar and Kuwait), the newspaper industry is facing this change, as it is elsewhere. Based on the 2016 National Readership Study (NRS) conducted by Ipsos, average daily readership of printed newspapers across the total population decreased from 64% in 2015 to 60% in 2016, while online newspaper readership increased from 25% to 27% during the same period. So traditional print readership remains in the ascendant.

When it comes to measuring print readership, Ipsos conducts a National Readership Survey (NRS), a syndicated study conducted amongst the whole population, to track consumption of print and other media in the region.

The study sample is set to meet the highest quality with the aim of ensuring accurate and reliable results. Strict control procedures are applied throughout the data collection phase. This involves ensuring that the sample and all related issues have been properly executed (sample selection, substitution, sample control...), data collection has been carried out in the most precise way and that controls and back-checks have been implemented as per Ipsos norms. Detailed briefing and extensive training sessions are undertaken to facilitate the complexity of the research and ensure the high value of the data collected.

Rigorous control procedures are applied through several means; control by the supervisors with the interviewers, back-checks and telephone call-backs, as well as on the IT level. The interviews are carried out face-to-face by trained interviewers, with people aged 15+ in several countries in the MENA region, including: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria and United Arab Emirates.

Market	Sample size
Bahrain	1,200
Egypt	3,500
Iraq	2,800
Jordan	3,000
KSA	5,000
Kuwait	3,000
Lebanon	2,800
Oman	1,500
Qatar	1,200
Syria	2,000
UAE	4,000

The sample differs from one country to another based on the size of the population, ranging from 1,200 respondents in Bahrain to 5,000 in Saudi Arabia.

Ipsos has also implemented an online methodology in the GCC countries where internet penetration is above 80%. 48% of the sample is recruited face-to-face and 52% online through the Ipsos Internet Survey panel, IIS, which currently boasts more than 300,000 panelists across the GCC region.

IIS invites people to join the panel either by “paid recruitment” through suppliers where Ipsos pays per recruited panelist, through a friend referral programme, or through “organic recruitment” via Rewarding Panel websites or the IIS Facebook page. To run recruitment campaigns, IIS provides and/or approves content for suppliers who place material on social media platforms (Facebook, Twitter, Instagram), or on banner ads of relevant websites. Suppliers’ performance and quality is monitored, and poor performers are excluded.

Ipsos endeavours to ensure that the quality of these samples are as high as possible, stipulating that participants should be:

- Real, that is, they are who they say they are. This is established by applying a double opt-in approach, country validation via Geo-IP, check for device settings and geo location, anonymous proxy detection, detection of robots via captcha code, detection of the so-called “5mn” emails, and detecting data anomalies and patterns.
- Fresh, meaning they should not have participated recently in similar surveys. To ensure this is achieved, strict panel usage rules are used to avoid interviewing the same people too often especially for similar types of survey or product category.
- Engaged, that is they complete surveys seriously. Speeding, straight lining, open-ends quality evaluation, panelists’ history is monitored across surveys and used for panel purge removing repeatedly fraudulent respondents.
- Unique, since they can only take the survey once. Duplicate emails identification, duplicate devices through digital fingerprinting (RelevantID®) and web/flash cookie are detected.

Respondents who pass the recruitment quality checks and double opt-in become panelists. Panelists participate in studies by answering the surveys which they receive by email. All panelists are subject to ongoing quality checks and those who fail are removed permanently from the panel.

Given the imperative to start collecting data on readership online, Ipsos implemented a pilot study to measure cross-platform behavior in the United Arab Emirates this year, as a prelude to extending coverage to all the markets where readership is measured.

Internet penetration in the United Arab Emirates is near universal at 99%. The objective of the study was to test a measurement approach which combined both recall and passive tracking of behavior. Respondents who answered the NRS survey were prompted by another email to download an application whether on their mobile (smartphone/tablet) or desktop. 2,000 respondents were interviewed, 20% of respondents (400 respondents) downloaded Gemius software onto both their mobile devices and desktop computer.

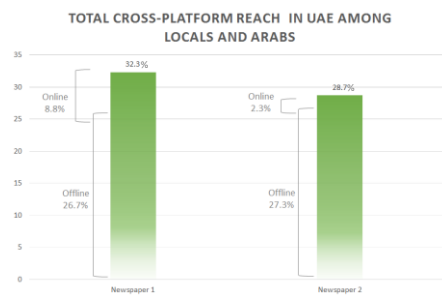
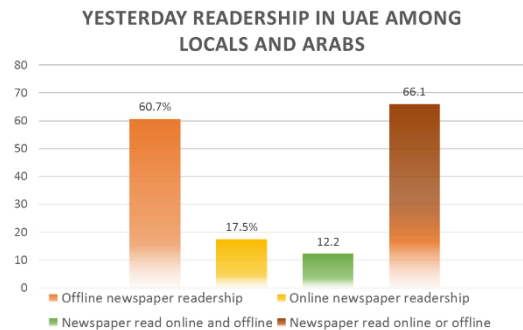
Ipsos has partnered with Gemius in the MENA region to measure website audiences for the past 7 years. Ipsos / Gemius is a study amongst the internet users’ population to track consumption of the internet across individuals in the region. The methodology combines site centric measurement where data is collected from websites who have added a code on their site. This code will allow collection of online traffic data in terms of unique

/cookies, page views, time spent...etc. Pop up surveys are displayed to a random sample of Internet users visiting participating web sites. This allows us to collect the socio-demographic profile of the Internet audience and other product/lifestyle data. Software, which is downloaded by a representative sample of the Internet population, allows us to collect data for both participating and non-participating websites (who are unwilling to tag their websites).

The objective is to determine the reach of sites, internet usage habits, number of visitors (Real Users), number of page views, average time spent per visit / surf / page view, Audience Composition, Audience Share, audience duplication, web sites surfed and demographic details (e.g. gender, age, marital status, education, occupation, household income etc.). Our approach introduced mobile tagging and the analyses shows readership of websites through browsing and apps. The sample is 20,000 cookie and software panelists in the region.

As the trend shifts online, newspapers are transforming their offerings to fit into the digital era. This trend is evolving and will continue to affect print readership in the years to come. While most still depend on traditional newspapers others depend on digital ones.

Findings from the study confirm that online newspapers readership is becoming more popular in the UAE amongst both locals and Arabs, although it is still small in relation to other countries. 61% of respondents claim to have read a printed newspaper yesterday, while just 18% read one online or via their mobile device. Two-thirds of digital reading took place on a mobile device. There is limited duplication on an average day, with just 12% of adults reading both in print and online yesterday. The overall reach of the medium has, however, increased by 5% compared with print only readership.



28.7%, split 27.3% offline and 2.3% online.

Some results from the experiment done among locals and Arabs in the UAE show that Newspaper 1 generated 26.7% offline readership and 8.8% online readership, while the combined readership of both online and offline resulted in a reach of 32.3%. As for newspaper 2, it generated a combined reach of

In 2018, we are planning to implement a single source panel approach in both the United Arab Emirates and Saudi Arabia and to release real data to the industry. Advertisers, agencies, broadcasters and content owners need a total view of the consumer that matches the readership rates of people online and offline.