AMP 21st century print and digital measurement for Great Britain

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Abstract

Audience Measurement for Publishers (AMP) is the new measurement service for published media in Great Britain and will be launched in February 2018, replacing NRS.

After an extensive testing period, Ipsos MORI began collecting enumeration and print readership data in January 2017 on behalf of the Publishers Audience Measurement Company (PAMCo). comScore are supplying a respondent-level file which allows the fusion of audience estimates for mobile and tablet platforms, as well as PC/laptop, which will enable full reach and frequency analysis to be carried by any combination of print and digital platforms. A digital all-device panel has been recruited from AMP participants to provide single source data on duplication of reading between print and digital platforms, which will be used to set duplication targets for the AMP/comScore fusion.

This paper outlines the main findings from the review of the first six month of AMP data, and progress towards the full data integration. It also summarises the challenge faced by PAMCo to get the market 'AMP ready', stimulating different ways of commercial thinking amongst publishers and agencies to exploit the full potential of the new service.

Introduction: Audience Measurement for Publishers (AMP)

Following the dramatic developments in the world of British audience measurement in July 2014[i], a new company called The Publishers Audience Measurement Company (PAMCo) was set up to replace NRS Ltd and oversee the measurement of published media audiences in Great Britain. After an intense pitch process, the research contract was awarded to Ipsos MORI, in partnership with comScore.

AMP has been introduced to allow publishers and agencies to plan and trade audiences across all platforms, recognising that publishers provide their content on whichever platform the audience chooses to consume. The main objective at the core of AMP is to provide reach and frequency planning across all type of platforms (i.e. print, PC, mobile and tablet), whereas NRS only allowed users to carry out reach and frequency planning across the print and PC platforms. Of the 49 million adults consuming published media in Great Britain over the course of a month, 76% will do so on their mobile devices, so this development is central to the requirements for AMP.

Overview of methodology and differences with NRS

The AMP service is based on a large survey conducted in-home, which has been in the field since January 2017. With 35,000 participants interviewed per year, the survey collects enumeration data (e.g. demographics, device usage, general consumption habits), as well as print readership and other required data (e.g. engagement with individual publisher brands).

The stakeholders have made a significant investment in AMP's high-quality random probability sample. Despite some interest in online interviewing, all but one of the companies pitching for the contract proposed face-to-face interviews in order to achieve the best possible response rates and quality of data. Another key consideration in choosing face-to-face was that it meant recruitment for the AMP digital panel could also be carried out face-to-face, which was the most likely route to securing cooperation.

More detail on the result of these changes can be found in the next section of this paper, and a full description of methodological differences relative to NRS is given in the Appendix.

In respect of the digital data, AMP will carry out a fusion with comScore digital audience estimates, which are recognised as the industry currency in Great Britain, as approved by UKOM. There have been two significant investments with respect to the fusion. The first is that comScore are creating a respondent-level data file which will allow fusion of audiences for mobile and, separately, tablet platforms, as well as pc/laptop audiences.

The second investment is the recruitment of a panel to passively measure digital reading. The AMP survey is used to recruit participants for the AMP digital panel, with a target of 5,000 participants per annum. AMP panellists install a Tracker App (specially designed by comScore) on all their devices i.e. pcs, laptops, mobile, tablet.

The AMP panel is not intended to provide estimates of digital reading. Its purpose is to provide single source data on duplication between reading in print and reading on digital platforms. These data will be used to generate print and digital duplication of reading targets, which will be used to calibrate the duplications achieved by the fusion. Duplication between reading on different digital platforms is calibrated to match comScore estimates in order match comScore's overall digital reach estimates.

Benefits of AMP

The key feature of AMP will be to provide the facility for de-duplicated reach and frequency analysis for mobile, tablet, pc/laptop and print platforms – either separately or in any combination. The new service will therefore allow users to plan and trade published media audiences across all platforms, whereas on NRS it was only possible to do this across print and PC/laptop.

Other benefits of the new measurement system are:

- AMP will deliver improved estimates of net brand reach and duplication

- AMP will be able to report considerably more brands across the platforms where they have a presence. Current estimates indicate that AMP will report digital audience estimates for around 105 brands: 17 newsbrands, 70 magazine brands and 18 digital only brands. NRS PADD currently reports 28 brands across all platforms on NRS, so this is a considerable increase.

- Daily and weekly digital reach will be reported, primarily for the newsbrands and for other brands where sample sizes allow.

- AMP will report newsbrand sections across print and digital. For example, this means that it will be possible to plan a campaign across all travel or all sport sections.

- The AMP dataset will include significantly more advertiser websites.

Timeline

- The development of the new methodology started in the last quarter of 2015 with a range of qualitative tests.
- Two large quantitative pilots were carried out, one in February 2016 and one in September 2016.
- A further qualitative test was carried out during the summer of 2016.
- In November 2016 the PAMCo Board approved the new enumeration/readership survey.
- Ipsos began collection of the enumeration/readership data in January 2017.
- NRS/AMP 'blended' print readership data are being published quarterly throughout 2017, with an incremental proportion of AMP data being released each quarter.
- The data integration methodology has been in development since January 2017 and will be refined during the rest of this year.
- The development of AMP has been overseen by the PAMCo Technical Group through a continuous process of assessment and review of the results.
- The new AMP currency will be officially launched in February 2018, based on a full 12 months of AMP print data and with the comScore fusion and new digital audience data and reach and frequency analysis facility in place.

Assessing the AMP Print data

The AMP print survey went into the field in time for January 2017. The first six months of print data have been released into the market as a blended 12 month dataset with the last six months of NRS print data. These blended data are still published under the name NRS.

As is usual in these transitional circumstances, an edict has gone out not to compare AMP print data with NRS print data, and certainly not for commercial and marketing purposes. So far this has been respected in the market. Of course the technical representatives have spent time looking at if and how the changes to the questionnaire and data collection have changed the shape of the print readership data.

There are a considerable number of differences between the AMP and NRS readership questions. The main differences are:

- A brand first approach designed to minimise confusion between readership claims for print and digital
- New colour visual prompts to enhance respondent recognition
- A new question structure for newsbrands, distinguishing between Saturday and weekday issues, and asking about the Sunday paper alongside
- An extended frequency scale to provide better discrimination

The details of the new features of the AMP questionnaire design are described in the Appendix.

It is always difficult to isolate the effect of any one particular change in methodology when there are numerous other changes. Furthermore, without the benefit of a controlled parallel run, we must compare AMP data with NRS data collected in earlier periods. The nature of current readership trends means that there is often be a downward trend in real reading behaviour to take into account, as well as the methodological changes we are scrutinising.

After six months of data collection, the differences relative to NRS July-December 2016 at a top line level are shown in Table 1.

Table 1: AMP versus NRS Print Data

	Read Past Year (indexed on NRS Jul-Dec 2016)	**Average Issue Readership (indexed on NRS Jul-Dec 2016)**
Weekday newspapers		
All	86	99
Qualities	88	112
Mid-market	78	96
Popular	89	91
Saturday newspapers		
All	114	103
Qualities	127	113
Mid-market	104	98
Popular	111	103
Magazines		
All	94	90
Men's & General	92	92
Women's	98	97
Customer & membership	83	79

Base: Jan-Jun 2017 AMP Sample size 17,191

One striking aspect of the data is the increase in Read Past Year (RPY) for the Saturday newspaper editions. This is a direct result of a change in question.

NRS newspaper readership questions were focused on the six-day Monday-Saturday paper. When questions specifically about Saturday readership were added to the NRS, these followed on from the existing six-day paper questions.

AMP has been designed with the seven-day newsbrand in mind, breaking out questions for each of the weekday, Saturday and Sunday editions. This more direct approach has boosted Saturday RPY measurements relative to AMP, particularly for the quality newspapers. Most of the additional RPY Saturday readers identified are occasional readers and hence the impact on AIR is less pronounced, though still apparent for some titles.

For magazines and weekday newsbrands the RPY reading measured is rather less than the NRS equivalent. The most obvious line of enquiry here is whether this is a result of the introduction of a brand-first readership interview.

AMP begins by establishing whether brands have been read in the past year 'in print' or 'on-screen' and then goes on to determine whether RPY is 'in print' or 'on-screen' or both. If 'on-screen' RPY **and** 'in print' RPY is claimed for a brand, then frequency of reading on-screen will always be asked before any questions about the recency and frequency of reading in print. A more detailed explanation of the questions and prompts used can be found in the Appendix to this paper.

The reasons for introducing a brand-first approach were:

- To reflect the way that many participants now read across platforms (though it is important to remember that not everyone does read in this way).
- To reduce the possibility of confusion, particularly for participants who have read the brand on a digital platform and therefore want to make a positive reading claim, but are not presented with the appropriate options to do so. Although tests on the NRS had been largely reassuring that participants were excluding digital reading from their print claims, some stakeholders were concerned that particular titles might be receiving over-claims for their print readership as a result of ‘confusion’ with digital reading. Furthermore, as readership continued to evolve, the scope for such confusion was likely to grow.
- To provide the structure to collect digital reading claims for all brands, in order to have the opportunity to use these data as ‘links’ for the data integration process. NRS had been limited as to how many digital brands could be included in the questionnaire.

While AMP collects a general (i.e. not platform specific) estimate of ‘on-screen’ reading for all brands there is no intention of publishing these data. The dissonance between recall estimates of digital reading and actual behaviour is very well understood. Indeed, data from the AMP panel which passively measures participants’ digital reading across devices underlines just how big the gap between claimed and actual behaviour is[ii]. For the top 15 publisher websites claimed reach is less than half passively observed reach, based on the same participants.

Nevertheless, it is interesting to see the shape of the recall data for on-screen reading in relation to in print reading, in order to understand how the brand-first questions are working. The top line data are shown below in Table 2.

Table 2: Print and On-Screen RPY Comparisons (Unpublished Recall Data)

	Print RPY	On-Screen RPY (indexed on Print RPY)	Net Print & On-Screen (indexed on Print RPY)
Daily newsbrands:			
All	100	50	131
Qualities	100	85	154
Mid-market	100	64	145
Popular	100	44	127
Magazines:			
All	100	31	119
Food & Health	100	83	154
Cars & Bikes	100	67	146
Men’s Sport & Leisure	100	46	129

Base: Jan-Mar 2017 AMP Sample size 8,535

While we know the absolute levels of reach are unreliable, the general shape of the data in terms of the sorts of publication (and indeed individual brands) most likely to have the most pronounced on-screen reading RPY claims and net print/on-screen RPY reach relative to print alone make sense. So, for instance, it is the quality newspapers that achieve the highest claims relative to print RPY, with a net print/on screen footprint 54% greater than print RPY alone. Overall, the on-screen claims for magazines are at a lower level, and for some categories of magazine bring relative little additional reach, e.g. women’s weeklies. On the other hand, the magazine groups where claimed on screen reading is much more prevalent, shown in Table 2 above, exactly reflect the brands that have the strongest digital presences, e.g. in the food and motoring sectors.

There are two main methodological reasons why a brand-first approach might change the shape of the print readership data:

- Extra ‘layers’ of questions have been added. In this case, we have added questions to establish whether RPY reading is in print or on screen (or both), and also an on-screen frequency question if appropriate. Layers of questioning can risk depressing estimates.
- Over-claiming in error for print is reduced.

When piloting the brand first approach we did see some small overall reduction in RPY readership levels relative to previous waves on NRS. For instance, in the second AMP pilot conducted in September and October 2016, when comparing against NRS January-June 2016 overall newspapers observed 6% less RPY, and magazines 7% less RPY. These comparisons are in line with those observed by NOM in The Netherlands when a similar style of brand-first approach was introduced[iii].

As Table 1 shows, the first six months of AMP survey data also indicate that print RPY is generally down relative to the last six months of pure NRS data (other than for the Saturday newspapers as previously discussed). However, it seems likely that this is in part to do with falling circulations and underlying readership trends, which have been particularly pronounced since mid-2016 in Great Britain. One piece of evidence for this is the difference observed between the Quarter 1 and Quarter 2 2017 AMP data, shown in Table 3 below.

Table 3: AMP Jan-Mar 2017 and AMP Jan-Jun 2017 comparisons with NRS

	AMP **Jan-Mar 17** RPY index (relative to NRS Jul-Dec 16)	AMP **Jan-Jun 17** RPY index (relative to NRS Jul-Dec 16)		AMP **Jan-Mar 17** AIR index (relative to NRS Jul-Dec 16)	AMP **Jan-Jun 17** AIR index (relative to NRS Jul-Dec 16)
All weekday newspapers	94	86		100	99
All Saturday newspapers	121	114		108	103
All magazines	97	94		90	90

Table 3 shows a further drop in the comparisons with NRS in Quarter 2 2017, particularly at the RPY level, despite a consistent methodology and questionnaire, highlighting the nature of the underlying readership trends.

In some cases there are methodological factors other than the introduction of brand-first which are likely to be affecting RPY levels, in particular the prompting used for customer magazines with relatively weak branding in their logos, which will be discussed in more detail below.

While it is not possible to isolate an overall brand-first effect, and certainly not to measure it, there is some indication of an effect for a few titles. Interestingly, these are not newsbrands but magazines. Prior to introducing a brand-first methodology there was speculation that a number of the particularly strong digital newsbrands might be benefiting from over-claims for print. However there is no clear indication in the shape of the data by brand to substantiate this. On the other hand, several of magazine brands with particularly large digital footprints have seen a consistently large drop in RPY through the two quantitative pilots and first six months of data collection, which follows through to a similarly reduced AIR estimate. It seems a credible hypothesis that the introduction of brand-first has played a role in these changes, though it may not be the only factor.

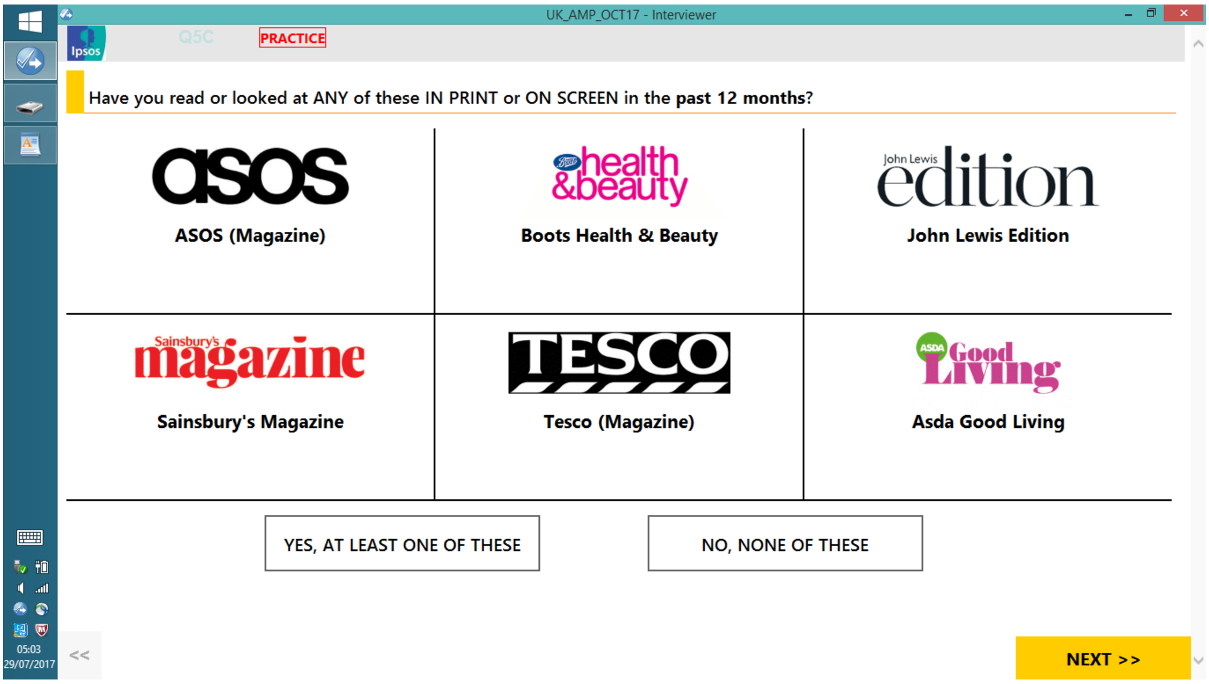
Returning to the magazine data in Table 1, it can be seen that while the comparisons for the women's titles are very close at a top line level to NRS July-December 2016, and around 8% down for both RPY and AIR for men's and general magazines, the sector which shows the most marked changes is the customer and membership magazine sector. This sector includes the supermarket magazines and magazines for a number of major retailers such as Boots and John Lewis, which are usually distributed in large numbers free of charge to customers. As these magazines have large distributions and readerships, their performance has a disproportionate effect on the top line readership data comparisons for magazines.

Closer scrutiny of the data revealed that the depression in readership in this sector was not universal. Some titles had very similar estimates to NRS, but others were showing significant differences. The differences were present at the RPY level, and followed through to AIR.

The hypothesis was that this was to do with a difference in prompting, particularly at the initial stages of the interview:

- For NRS the very first visual prompts showed titles in groups of six using black and white typescript. (This is the Extended Media List (EML) stage, when the participant identifies which groups of six contain at least one title that has been read before proceeding to more detailed questions about specific titles.) The visual prompts then used for the RPY question (and readership questions beyond) were black and white mastheads.
- AMP used full colour mastheads throughout to prompt the readership questions, with the name of the title in typescript beneath, plus stylised, non-specific front covers to prompt for the individual title recency and frequency questions.

Reviewing the AMP prompts, it was clear that the branding which might enable participants to associate a particular title with a particular store or organisation was much stronger for some titles than others, as the examples below illustrate. Even though the full name was also shown in typescript below, this was not the dominant prompt, and the hypothesis was that some titles might be in danger of being missed.



Qualitative work, including probing responses to alternative prompt designs, has confirmed this is very likely scenario. Consequently a refinement of the prompts, shown below, is being tested, in which the typescript prompt is shown in a more prominent position above the masthead and in a larger font. A quantitative split sample test is now underway on the survey, with half the sample shown the original design above and half the proposed design below. Similar changes are also being tested for the subsequent screens used to establish RPY reading.

Another aspect of change has been extending and redefining the frequency scale used, with the objective of achieving better discrimination. AMP uses a verbal scale with numerical explanations, as did NRS, but there have been a number of changes.

Table 4: Differences in the frequency question between NRS and AMP

<table>
<tr><th>National Readership Survey</th><th>amp</th><th></th></tr>
<tr><td rowspan="12">Almost Always (at least 3 issues out of 4)
Quite Often (at least 1 issue out of 4)
Only Occasionally (less than 1 issue out of 4)</td><td>Almost Always (3 or 4 copies out of 4)</td><td rowspan="4">Magazines</td></tr>
<tr><td>Quite Often (2 copies out of 4)</td></tr>
<tr><td>Occasionally (1 copy out of 4)</td></tr>
<tr><td>Less often</td></tr>
<tr><td>Almost Always (4 or 5 copies a week)</td><td rowspan="4">Weekday newspapers</td></tr>
<tr><td>Quite Often (2 or 3 copies a week)</td></tr>
<tr><td>Occasionally (1 copy a week)</td></tr>
<tr><td>Less often</td></tr>
<tr><td>Almost Always (3 or 4 copies a month)</td><td rowspan="4">Saturday and Sunday newspapers</td></tr>
<tr><td>Quite Often (2 copies a month)</td></tr>
<tr><td>Occasionally (1 copy a month)</td></tr>
<tr><td>Less often</td></tr>
</table>

The main differences are:

- The addition of a code for reading 'Less Often' to provide a more appropriate option for one-off and very infrequent readers, and break up what had become an increasingly large category of 'Only Occasionally' readers (usually well over 50% of RPY readers).

- While keeping a common verbal scale for all publications, the numeric explanations have been adapted for weekday newspapers to refer to copies out of five per week, and for Saturday and Sunday newspapers to refer to copies out of four per month. Magazines share a common explanation of copies out of four.

- Redefining the numerical explanations. In particular, the stated numeric threshold for 'Quite Often' is now higher, i.e. '2 or 3 copies a week', or '2 copies a month', rather than the NRS definition 'at least 1 issue out of 4'. Now there is the option of 'Less Often', the threshold for 'Occasionally' is also rather higher, '1 copy a week' or '1 copy a month', rather than the NRS definition of 'less than 1 issue of 4'.

More detail on these changes and the reasons for them can be found in the Appendix.

The key question when assessing the new AMP frequency scale is how well it serves to discriminate between readers with regard to its primary role of feeding into reach and frequency modelling. In other words, how well does the scale segment readers according to their probability of contact with an average issue?

Our data indicate the redesign has worked well, as illustrated by Table 5 below.

Table 5: Comparison of AMP and NRS Frequency Data

	% of RPY readers claiming frequency NRS Jul-Dec 2016	% of RPY readers claiming frequency AMP Jan-Jun 2017	AIR Probability by frequency cell NRS Jul-Dec 2016	AIR Probability by frequency cell AMP Jan-Jun 2017
Weekday newspapers:				
Almost Always	19%	18%	0.80	0.85
Quite Often	19%	17%	0.21	0.29
Only Occasionally(NRS) Occasionally(AMP)	62%	23%	0.04	0.08
Less Often (AMP)		42%		0.02
Sunday newspapers:				
Almost Always	28%	28%	0.96	0.97
Quite Often	19%	13%	0.41	0.58
Only Occasionally(NRS) Occasionally(AMP)	54%	22%	0.08	0.15
Less Often (AMP)		37%		0.03
Weekly/ftnt. magazines:				
Almost Always	18%	18%	0.94	0.91
Quite Often	19%	12%	0.33	0.46
Only Occasionally(NRS) Occasionally(AMP)	63%	26%	0.07	0.13
Less Often (AMP)		44%		0.03
Monthly magazines:				
Almost Always	17%	14%	0.98	0.97
Quite Often	18%	13%	0.78	0.85
Only Occasionally(NRS) Occasionally(AMP)	66%	32%	0.24	0.44
Less Often (AMP)		41%		0.12

The main points to note in respect of the frequency of reading data are:

- The proportion of 'Almost Always' claims amongst RPY readers are generally similar, but the proportion identifying as Quite Often has fallen, as might be expected from the higher threshold definition of '2 or 3 copies a week' or '2 copies a month', versus the NRS definition 'at least 1 issue out of 4'.

- The probability data in the final column show that there has been a corresponding increase in the probability that 'Quite Often' readers are Average Issue Readers, particularly for weekly publications.

- The large NRS 'Only Occasionally' frequency group has been broken up into 'Occasionally' and 'Less Often'. The 'Less Often' group is substantial and comprises roughly 40% of RPY readers.

- The corresponding probabilities of the AMP 'Occasionally' and 'Less Often' frequency groups make sense and show the discrimination between the two groups. As would be expected there is a very low probability of AIR readership for the 'Less Often' group.

AMP Digital Audience Data

The AMP print data is just one piece of the jigsaw. It is the integration of digital data which will complete the picture for the launch AMP in early 2018.

The NRS PADD fusion was a high-quality fusion developed by RSMB[iv] . However, there were a number of restrictions to its scope, in respect of the data available to fuse:

- The chief frustration was the lack of respondent-level data for mobile audiences which meant that while there was a fusion of the comScore PC audience data with NRS print readership estimates, the only way to represent mobile audiences was to calibrate recall data as to how often participants read the brand on a mobile device to match comScore's mobile estimate. While this gave the big 'reach' figure, there was no possibility of using page views (or similar) to enable reach and frequency planning.

- NRS did ask about digital reading for 37 of the larger digital brands, both to provide hooks for the fusion process and a basis for calibrating the mobile platform reading claims to match comScore, but there was a limit as to how many brands could be included. Questions on digital reading came after print, and it was not possible to ask the participant to work through another long media list.

- Finally, although the diagnostics indicated the fusion was working well largely reflecting print/digital duplications of reading for the larger brands, not surprisingly representing duplications for brands with small sample sizes was much more challenging for the fusion. For the very smallest, duplication might be no better than random. The smaller brands tended to be magazine brands, and seeing little or no duplication in the dataset undermined the confidence of some publishers in the data, particularly for those interested in promoting a complementary print and digital advertising sell. Furthermore, alternative sources of duplication estimates were usually recall surveys, with a tendency to overstate duplication and perhaps create unrealistic expectations as to the degree of overlap that might be expected between print and digital readers.

AMP was set up from the outset for data integration with comScore:

- The most critical element is the provision of a respondent level data file from comScore, including a combined multiplatform dataset of estimates for each of the mobile, tablet, and pc/laptop platforms, including data for apps visited on the mobile platforms. In a further development, estimates of daily and weekly reach (as well as the standard monthly reach) are supplied, a particular requirement of the newsbrands.

- When designing the AMP survey the intention was to ensure good data were available for data integration purposes, a key role of the brand-first on-screen reading claims.

- In order to collect single source data on the duplication of reading by platform, the AMP panel was recruited from a sub-set of AMP participants. The ambitious requirement was for this to be an "all-device" panel with participants installing a light Tracker App on all of their devices which would track their digital reading behaviour (for publisher sites only) for 28 days, as soon as possible after their AMP interview.

Although there is much work still to do before the launch in February 2018, we are some way along the development process and can give the following update.

The most challenging aspect is the provision of the comScore respondent level file, which is still being refined. The realities of working with hybrid data drawn together from a variety of sources and overlaid on respondent level data should not be under-estimated. comScore has four separate metered panels of respondents in the UK respectively measuring

- PC audiences aged 6+: sample of around 75,000 in production
- iPhone audiences aged 18+: sample of around 3,000 in production
- Android phone audiences aged 18+: sample of around 3,000 in production
- iPad audiences: sample of around 1,000 in production.

There is currently no metered panel for Android tablets.

The objective is that the respondent level dataset comScore puts together for fusion purposes contains audience estimates which match comScore's published MMX Multi-platform data in the UK. Achieving this is complex and challenging. comScore's audience data are hybrid data modelled from a combination of panel (people) measurement data and site-centric (device) census data. In preparing a respondent level file, data from four separate panels must be brought together, and the hybrid audience targets must be calibrated website by website to match the published estimates as closely as possible.

The other area of particular interest in the development process is the data generated by the AMP Panel, and although samples are still building, there is enough sample to get a feel for the shape of the data and how they will be used. Ipsos have written a paper describing how the panel has been built and the various challenges along the way, which will also be given in Madrid[v].

The purpose of the AMP panel is to generate print and digital platform duplication of reading targets, which will be used to calibrate the duplications achieved by the fusion. Duplication between reading on different digital platforms is calibrated to match comScore estimates in order match overall comScore digital reach estimates.

The AMP panel is not intended, either by design or sample size, to provide estimates of digital reading. It is not possible to include reading on work devices for instance, nor, at the moment at least, to pick up reading via distributed content platforms such as Apple News and Facebook Instant Articles.

The key measure is to understand how much more (or less) likely is a print reader to read a brand in digital than a non-print reader. Early data from the AMP panel (based on a maximum sample by brand of 2,573) indicate that across a month:

- Newsbrand print readers are 2.2 times as likely as non-print readers to read the same brand in digital
- Magazine print readers are 5.6 times as likely as non-print readers to read the same brand in digital.

The data by individual brand, where sample sizes are large enough for analysis, very much make sense as to the types of brand where print readers are particularly likely to also read in digital.

The data show (not surprisingly) how much duplication is driven by the penetration of the brand. If a brand is a relatively low penetration one, with a digital readership for instance of 0.5% of the general population, then even if print readers are 5.6 times more likely than non-print readers to read the same brand in digital this will equate to just two or three percent of print readers also reading in digital.

The panel duplication data cannot be used at face-value, as the duplication targets for the fused database must take into account different levels of digital reach in the fused comScore data (relative to those observed in the panel). As part of creating these targets, the Data Science team at Ipsos have also devised an ingenious method smoothing the data which takes into account sample size, as it is imperative to have duplication targets for the smaller brands as well as the larger ones due to the smaller brands' concerns about NRS PADD duplications. This methodology is still in appraisal, but will no doubt be the subject of a future PDRF paper.

We will also be assessing just how much calibration of the duplications achieved by the AMP fusion is required in order to match the duplication targets derived from the panel. Initial tests of the data integration suggest that the fused duplications for larger digital brands tend to be already close to the target required. More work is needed to assess the performance of the fusion for the smaller brands, and the degree of adjustment required to match the target duplications.

Getting AMP ready

While work on the technical development of AMP continues in parallel there has been an education process to encourage use and different ways of thinking about the commercial use of the data.

A key part of this has been working alongside the computer bureaux (Telmar, IMS, Kantar) that are currently licensed to provide a data analysis service for NRS. PAMCo have facilitated conversations between its stakeholders (media agencies and publishers) and the computer bureaux, in order to enable the AMP dataset to be accommodated in their systems ready for use when AMP launches in February 2018.

Another area that has been addressed by PAMCo in the year leading to the launch is helping stakeholders to get their commercial teams 'AMP ready'. All agencies and publishers have been asked to appoint an AMP champion i.e. someone in a commercial role who can understand how AMP can help them plan and buy published media in a new and more effective way. AMP champions are responsible for ensuring that their company is fully updated on AMP news and promote AMP and the utility of the dataset within their company.

Arguably a more sophisticated measurement system like AMP will enable the industry to better monetise digital audiences and the shift from print to online reading, however to get maximum value from it and to ‘transform industry fortunes’, it appears evident that the industry needs to use AMP much more than it uses NRS and also in new and innovative ways.

The key messages for the industry are:

- Since AMP is a multi-platform currency, audience packages should be multi-platform too, as well as easily articulated, easily understood, and easy to plan and buy.
- Sales teams should be structured in a way that allows them to focus on brand building and have a deep enough understanding of AMP, whilst separate performance teams specialise in proprietary data and analytics to deliver linked, but different outcomes for customers.
- Planning and trading teams at media agencies should use AMP differently to unlock the untapped audience value which AMP will bring.

Conclusions

The new AMP print data have rolled out smoothly into the market, albeit still blended with NRS readership data until February 2018. Users were prepared as much as possible for the likelihood of change to their estimates, given the methodology differences with NRS. In the event, most titles are recording estimates which are not discernibly different from NRS, despite the over haul of the methodology and introduction of a brand-first questionnaire.

Despite early challenges, particularly with respect to participants installing the Tracker App on their pcs, recruitment levels to the AMP all-device Panel continue to improve. The Panel is already delivering credible duplication data which are being used to create duplication targets for the test fusions with comScore. Given the investment involved in recruiting and running the AMP Panel, PAMCo will be assessing how much calibration of the fusion duplications is required to meet these targets. In other words, to what extent is or isn’t the fusion (pre-calibration) representing the duplication levels the Panel indicates we should expect? The AMP Panel gives us the appropriate data to make this assessment for the first time and provide the necessary validation.

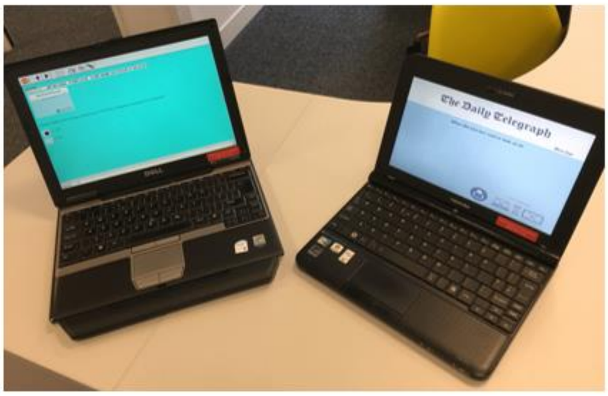
The real test of AMP will be the launch of the full reach and frequency planning facility by platform in February 2018. The intention is that this enables publishers to unlock the value of their mobile platforms for brand advertising. However, AMP is not a magic wand, and much will depend on how publishers and agencies choose to use the data.

APPENDIX

Description of differences between the AMP Print Readership Survey and NRS

Mode of interview

Whereas NRS used DS-CAPI (double-screen CAPI, with a laptop for the interviewer and a separate small display screen for the participant), the AMP interview is carried out on a tablet computer with a single screen to accommodate both the questions and instructions for the interviewers to read and the visual prompts for the participant.



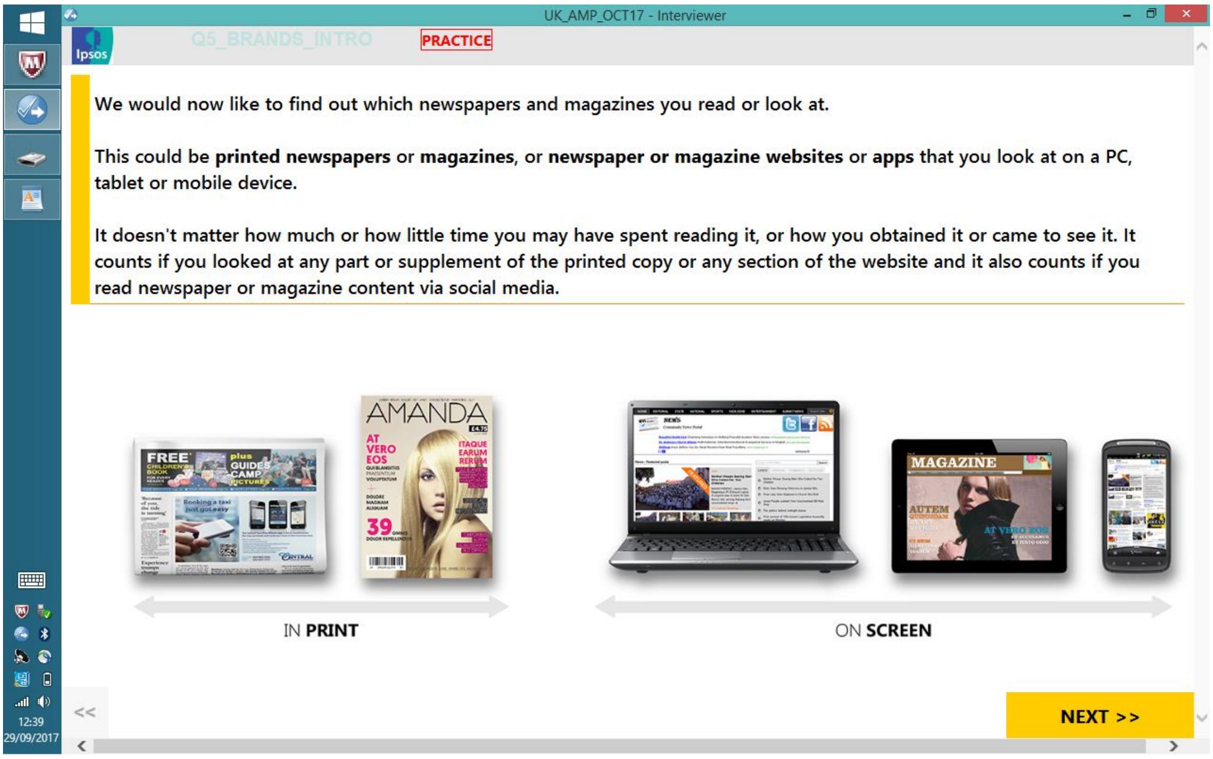
Naturally this means differently designed prompts and disclosing response options that in some cases were hidden for NRS.

Brand-first

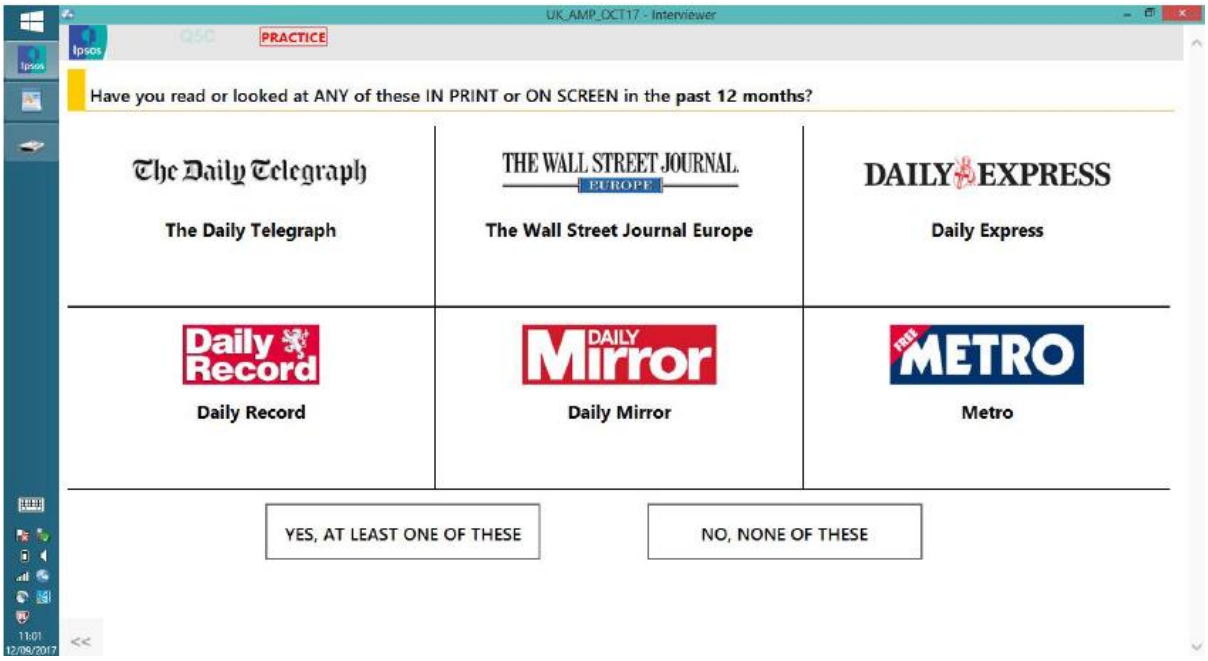
The biggest single change to the question structure is the introduction of a brand-first approach. The NRS interview began with the detailed questions about print, stressing repeatedly that the questions were only about print, and then asked questions about a selection of digital brands later in the interview.

AMP's brand-first approach for participants who have accessed the Internet in the past 12 months is as follows:

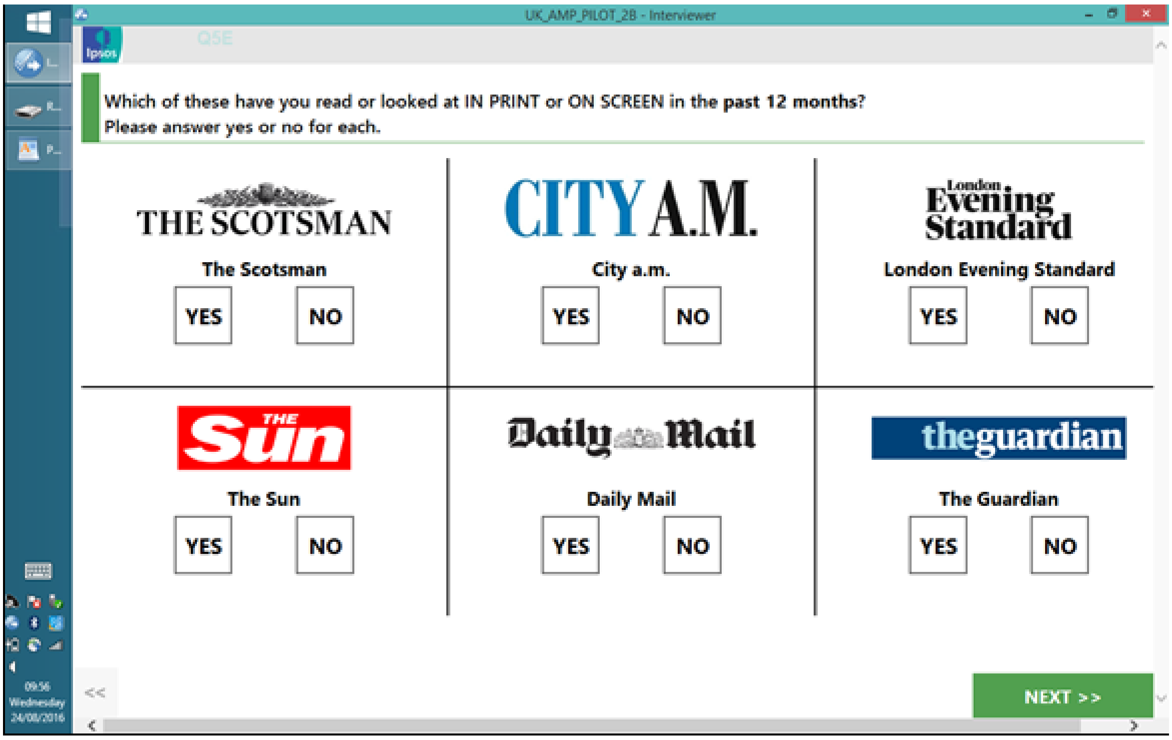
1. Introduction to the concept of reading on any platform: "We would now like to find out which newspapers and magazines you read or look at. This could be printed newspapers or magazines, or newspaper or magazine websites or Apps that you look at on a PC, tablet or mobile device".



2. The ‘Extended Media List’ (EML) approach has been retained, so as to work through a long media list relatively quickly. EML presents brands in groups of six with the participant indicating first of all simply whether any of the six have been read in the ‘screen-in’ period of past 12 months. EML has been adapted to a brand-first approach, and the question now reads: “Have you read or looked at ANY of these IN PRINT or ON SCREEN in the past 12 months?”



3. On average, participants select between five or six EML screens. The interviewer then takes the participant through each of the six brands on the screens selected, establishing whether each brand has been read in the past year (RPY): “Now for those that you have selected, please tell me for each one whether you have read or looked at it in the past 12 months. Remember that this could be IN PRINT or ON SCREEN”



4. Next for brands with a positive RPY claim, it is established whether that reading was ‘In Print’ or ‘On Screen’ or both. This is known as ‘Platform RPY’. AMP does not attempt to identify digital reading by device or platform more specifically, e.g. whether it was on a ‘mobile or pc, or on an app, due to the difficulties of participants recalling digital behaviour in detail by specific platform.

It was decided that the most straightforward prompt to aide participant recognition, was a single brand prompt (rather than showing variations of the print and digital mastheads alongside one another). If the partner digital platform has a different name altogether this is accommodated with a dual logo prompt.

5. If the participant has made a RPY claim for both print and on-screen reading, they will be asked a frequency question for on-screen reading BEFORE any questions about print. This order was chosen with the intention of minimising any tendency for print average issue (AIR) over-claims.

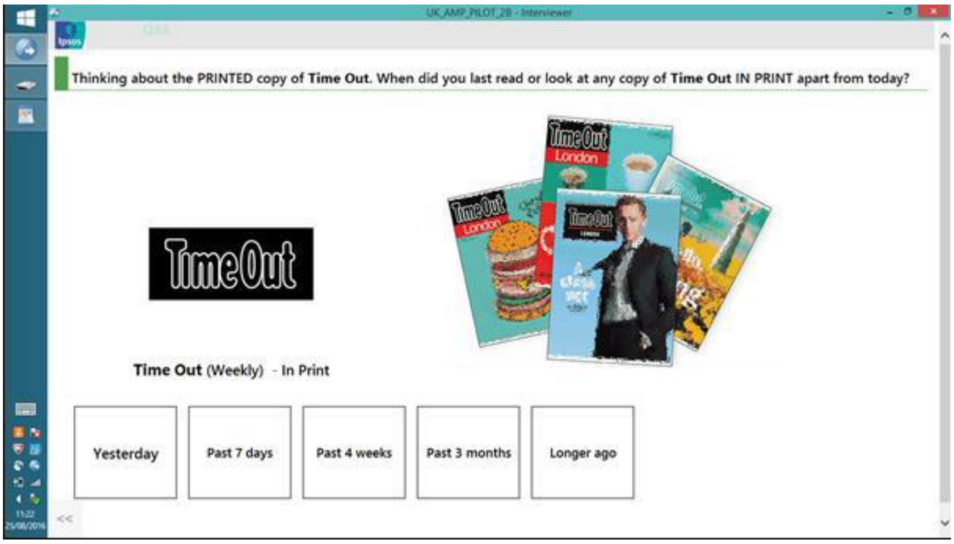
6. Print recency and frequency questions then begin, brand by brand, always starting with any magazines with a RPY claim in print, in digital or both.

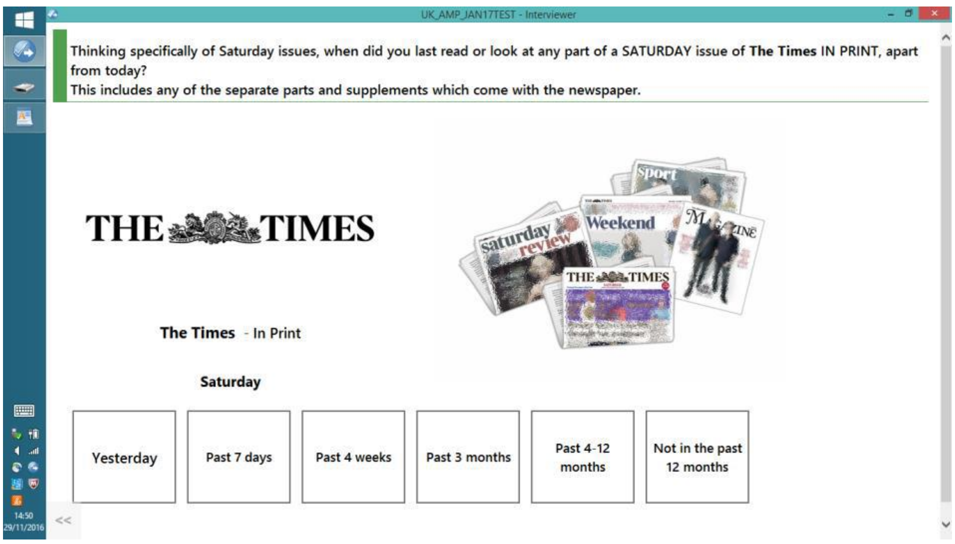
Participants who have not accessed the Internet in the past 12 months (currently 14.9% of population, and 18.6% of the sample) are only asked print questions.

Full colour prompts

As can be seen from the examples above, AMP has moved to full colour prompting. Even at EML stage, rather than black and white typescript, full colour mastheads are used, albeit with the addition of the title in typescript. As discussed earlier in the paper, we are currently testing a refinement of this design which gives more weight to the typescript prompt.

When it comes to the brand specific recency and frequency questions stylised non-specific front covers are shown in addition to the colour mastheads. It is hoped that this further emphasise that these questions are about print publications.





Asking about the weekday, Saturday and Sunday editions of newsbrands on a like-for-like basis

NRS newspaper readership questions were focused on the six-day paper. When Saturday recency and frequency questions were added, they were asked following on from the six-day paper questions.

AMP has been designed with seven-day newsbrand in mind, and breaks out the weekday, Saturday and Sunday editions.

The newsbrand question sequence runs:

- Frequency of reading on-screen (if RPY claim for on-screen)
- Recency of reading Monday-Friday copy (if RPY claim for in print)
- Frequency of reading Monday-Friday copy
- Recency of reading Saturday copy
- Frequency of reading Saturday copy
- Recency of reading Sunday copy (if RPY claim for in print)
- Frequency of reading Sunday copy
- Recency of reading Saturday supplements (if Saturday copy read in last 3 months)
- Recency of reading Saturday in-paper sections
- Recency of reading Sunday supplements (if Sunday copy read in last 3 months)
- Recency of reading Sunday in-paper sections

An amended and extended frequency scale

NRS used a standard frequency question and scale for all publications regardless of publishing interval. The scale was a three point verbal scale with numeric explanations: There are a number of changes for AMP, shown in Table 6 below:

Table 6: NRS and AMP Frequency questions

NRS	**AMP**
Standard frequency question for all publications: Which of these best describes how often you read or look at _____? 1. ALMOST ALWAYS (at least 3 issues out of 4) 2. QUITE OFTEN (at least 1 issue out of 4) 3. ONLY OCCASIONALLY (less than 1 issue out of 4) 4. NOT IN PAST 12 MONTHS	For Monday-Friday newspaper editions: Which of these best describes how often you normally read or look at any WEEKDAY edition of _____in print? • Almost always (4 or 5 copies a week) • Quite often (2 or 3 copies a week) • Only occasionally (1 copy a week) • Less often For Saturday newspapers: Which of these best describes how often you normally read or look at SATURDAY editions of _____in print, including any parts and supplements? • Almost always (3 or 4 copies a month) • Quite often (2 copies a month) • Only occasionally (1 copy a month) • Less often For Sunday newspapers: Which of these best describes how often you normally read or look at _____in print, including any parts and supplements? (Scale as for Saturdays) For magazines: Which best describes how often you normally read or look at ______in print? • Almost always (3 or 4 copies out of 4) • Quite often (2 copies out of 4) • Only occasionally (1 copy out of 4) • Less often

The changes are:

- The introduction of an additional option ‘Less Often’, in addition to ‘Occasionally’. The intention was to provide a more appropriate option for one-off and very infrequent readers. The proportion of NRS readers classifying themselves as ‘Only Occasionally’ had become larger over time as reading habits changed, and an additional option was intended to provide better discrimination.

- For newsbrands there is also a different numerical qualification, which is phrased in terms of number of copies read and varies according to whether the publication is a daily (copies out of five per week) or Saturday or Sunday paper (copies out of four per month). This was a particular concern for the newsbrands who felt for weekday papers asking about ‘issues out of 4’ when there are five issues a week seemed counter-intuitive. There was also a concern, supported by qualitative work, that the NRS common scale might lead to confusion for someone who reads a brand’s Saturday paper regularly every week, but doesn’t read the weekday paper. For magazines, the common numerical scale remains out of four, though the reference is now to copies rather than issues as qualitative testing indicated ‘copies’ was a more natural word for participants to use.

- Finally there has been some redefining of the numeric explanations. Most markedly, the stated numeric threshold for ‘Quite Often’ is now higher, i.e. ‘2 or 3 copies a week’, or ‘2 copies a month’, rather than ‘at least 1 issue out of 4’. Now there is the option of ‘Less Often’, the threshold for ‘Only Occasionally’ is also rather higher: ‘1 copy a week’ or ‘1 copy a month’ rather than ‘less than 1 issue of 4’. While participants will not always interpret these scales literally, some redistribution of claims was expected. It was hoped this would bring greater discrimination in terms of probability of reading by frequency cell.

To illustrate the change, Table 7 shows the literal interpretation of the NRS and AMP scales in terms of percentage of issues/copies read.

Table 7: NRS and AMP - Theoretical proportion of copies read

	NRS	**AMP Monday – Friday scale**	**AMP Saturday/Sunday scale**
Frequency of reading:			
Almost Always	At least 75%	80%+	75%+
Quite often	At least 25%	40%+	50%
Only Occasionally (NRS) /Occasionally (AMP)	Less than 25%	20%	25%
Not in the past 12 months (NRS)	0%		
Less often (AMP)		Less than 20%	Less than 25%

As discussed in the main paper, it appears these changes to the frequency scale have worked well and brought greater and appropriate discrimination.

Other changes

The NRS stipulation that “Reading must be for two minutes or more” is no longer used, as it does not fit well with digital reading definitions in comScore.

There is no ‘second screen sort’, as there was with NRS, to check the participant hasn’t missed any screen with titles on that they have read in the last 12 months.

The media list includes a selection of publisher brands which are either digital-only or have a print counterpart which is too small to be measured on the survey. The Independent newspaper for instance is no longer published in print, but is published as a digital-only brand. Other brands have been launched as digital only.

Questions have been added about newspaper in-paper sections and there are recency of reading questions for a considerably extended list of newspaper supplements. This was a particular requirement in order to create the ability to analyse audiences for types of content across print and digital e.g. reading finance and business, or travel etc..

Changes to the newsbrand sequence of questions to accommodate the weekday/Saturday distinction and additional newspaper supplements and sections.

Magazine recency and frequency questions always asked before newsbrand questions, as there are now more newsbrand questions than before.

There are new engagement questions. In addition to source of copy and time spent reading, a question on attitudes to newsbrands and magazines has been added. Participants are asked to say whether they agree strongly, agree a little, disagree a little or disagree strongly with four statements:

- Reading it is time well spent
- I feel a close connection with it
- It gives me something I can't get elsewhere
- I trust what I read in it

Questions on device ownership and use have been extended, in part to provide enumeration data for comScore and in part to assist the data integration process. To create the room to do this some of the NRS 'marketing and lifestyle' questions have been removed.

Last, but definitely not least, the AMP interview includes attempted recruitment to the digital panel.

References

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