

CommPass

MATINEE


ciM

2019

READ

Bernard Cools

**President Technical
Committee Print**



CIM NCRS 2018-2019

« Thank God for the Internet »

Bernard Cools

21/11/2019



marillion.com



*"In our racing stripes
We rejoice at being "connected"
Without touching
Thank God for the internet
We stare at our screens
All our lives
What a waste of eyes"*

Interior Lulu, marillion.com (1999)

NCRS 2018-2019



Agenda

- Methods: all about change
- Did digital make it all ?
- Helicopter view on print results
- What we learn from other sources
- Next steps ?
- Conclusion: a new reality



Methods: all about **change**

Random face-to-face: past & present

Past



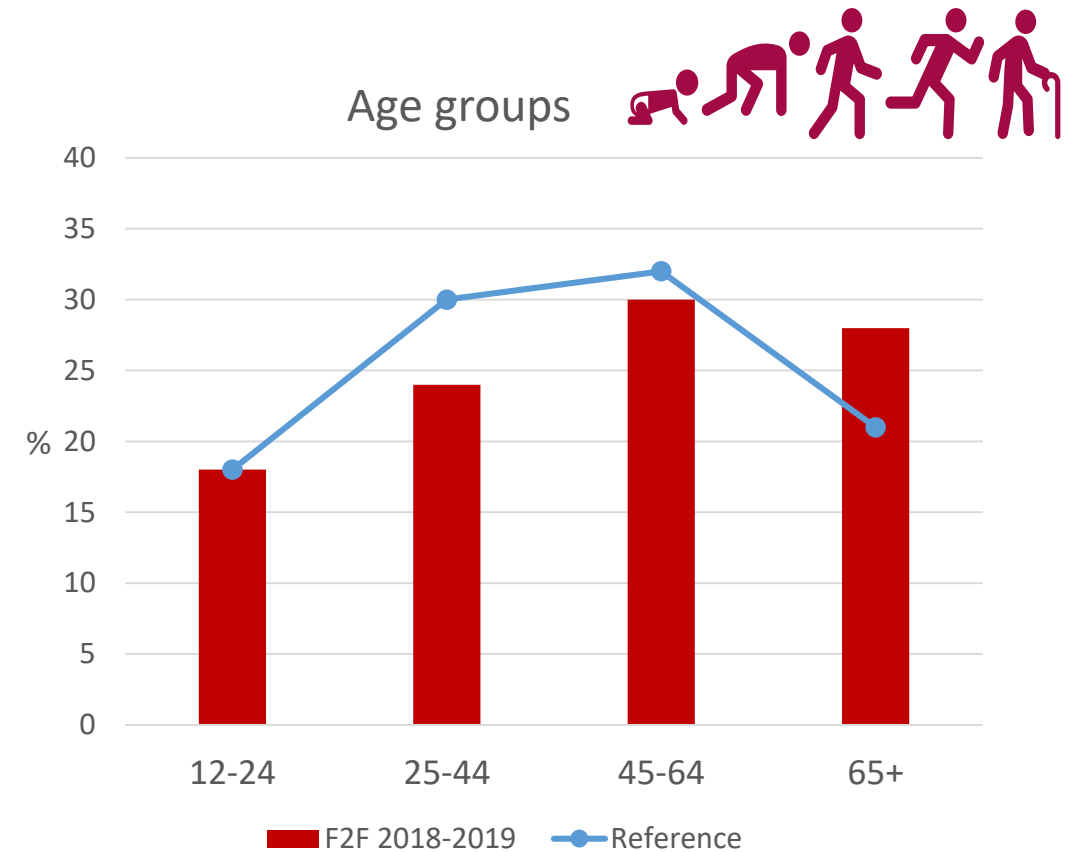
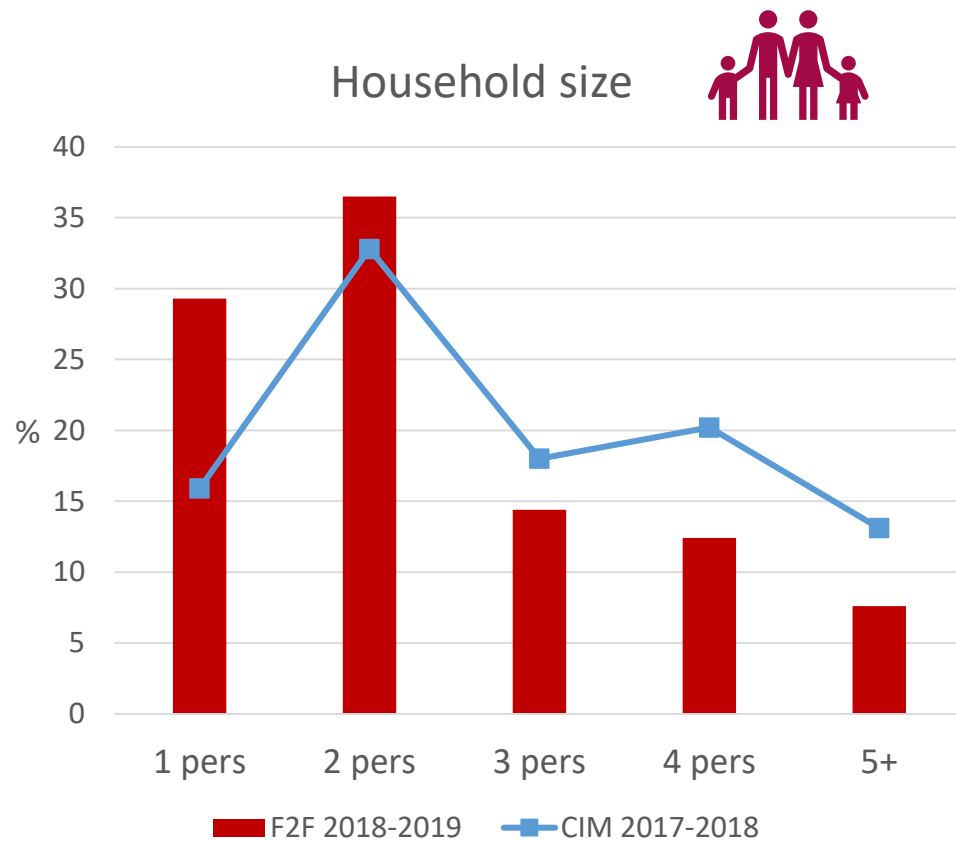
« Go there
find a man/woman
of that age »

Present

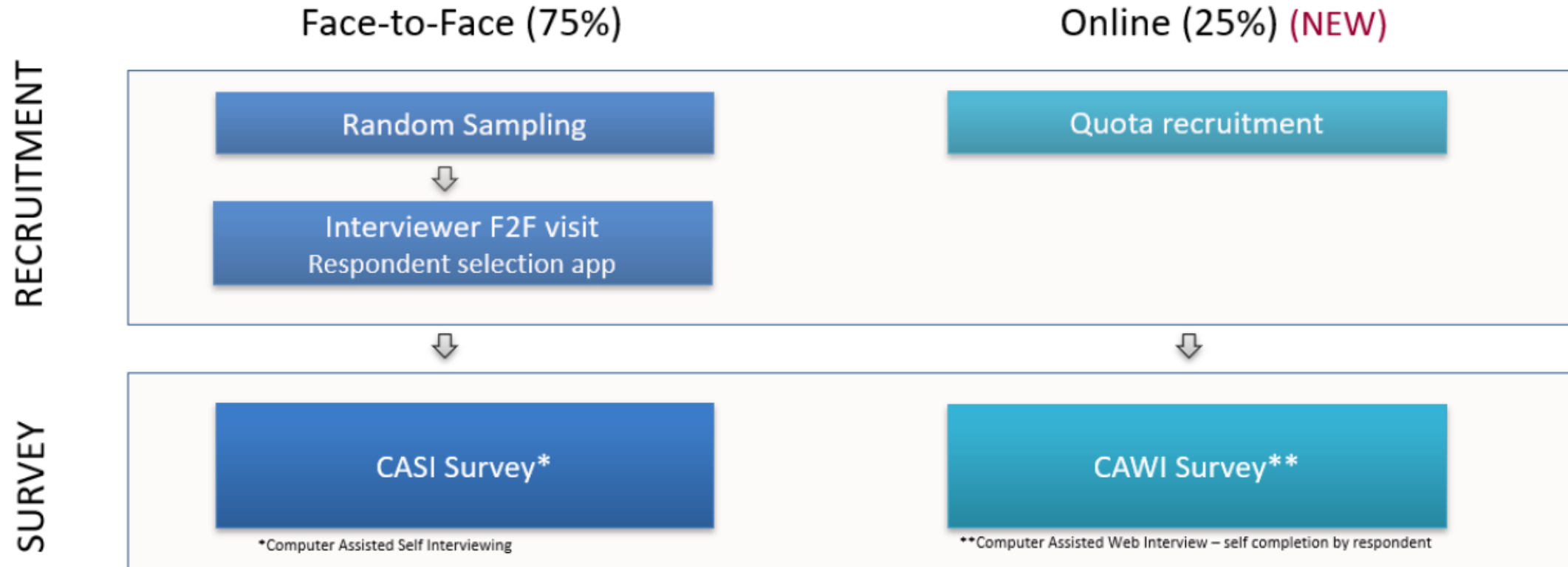


1. « Go there and talk to someone »
2. Ask « Who lives here ? Who is present ? » and code in the App
3. Wait for the App to point out who has to be interviewed
4. Go on with interview procedure

Consequence: F2F disproportional on small households & older respondents

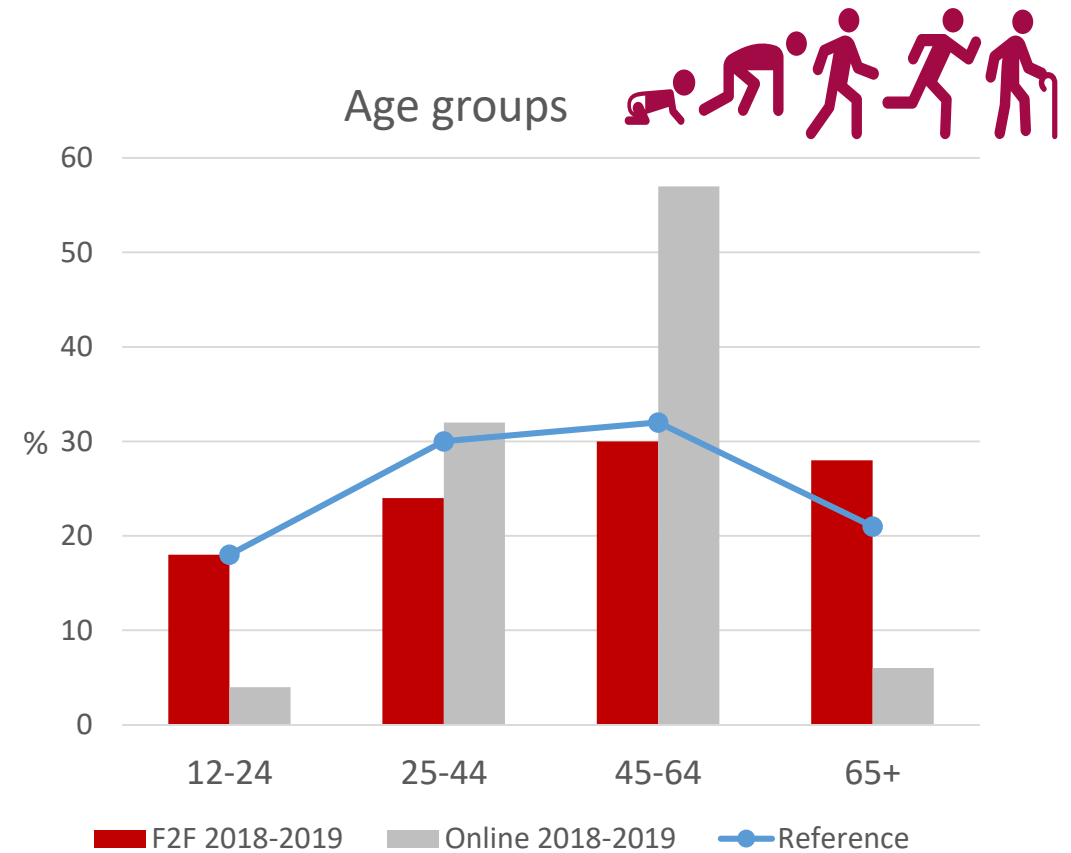
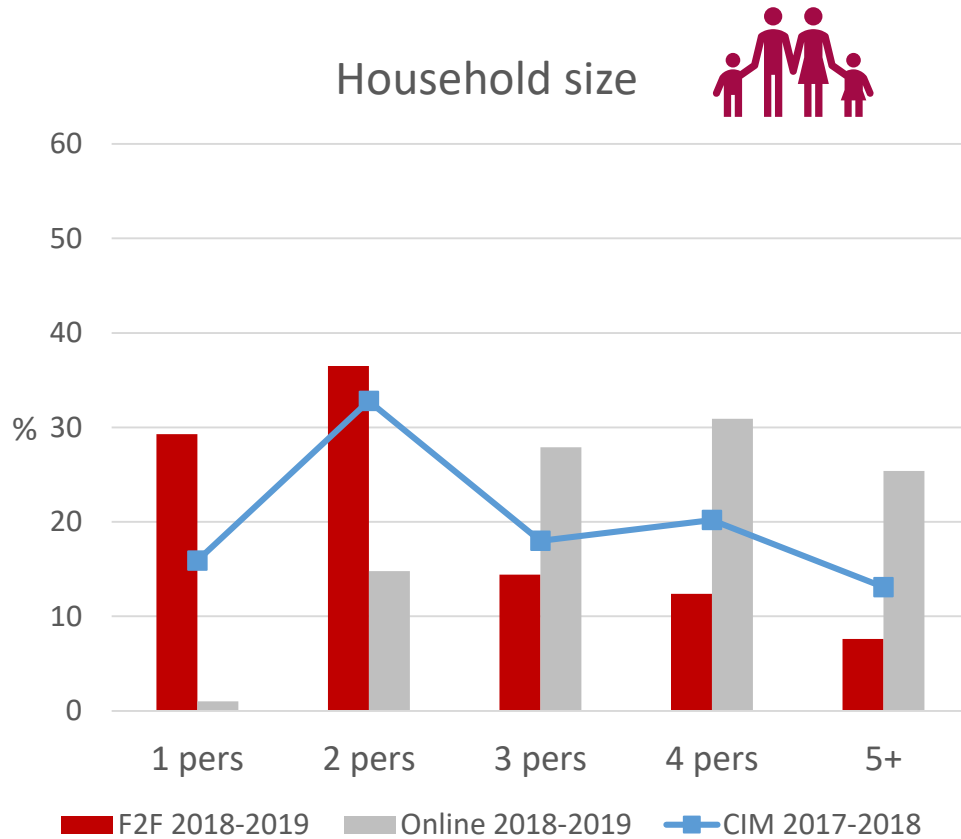


Introduction of online to rebalance profiles



Online disproportional...

100% = segment total

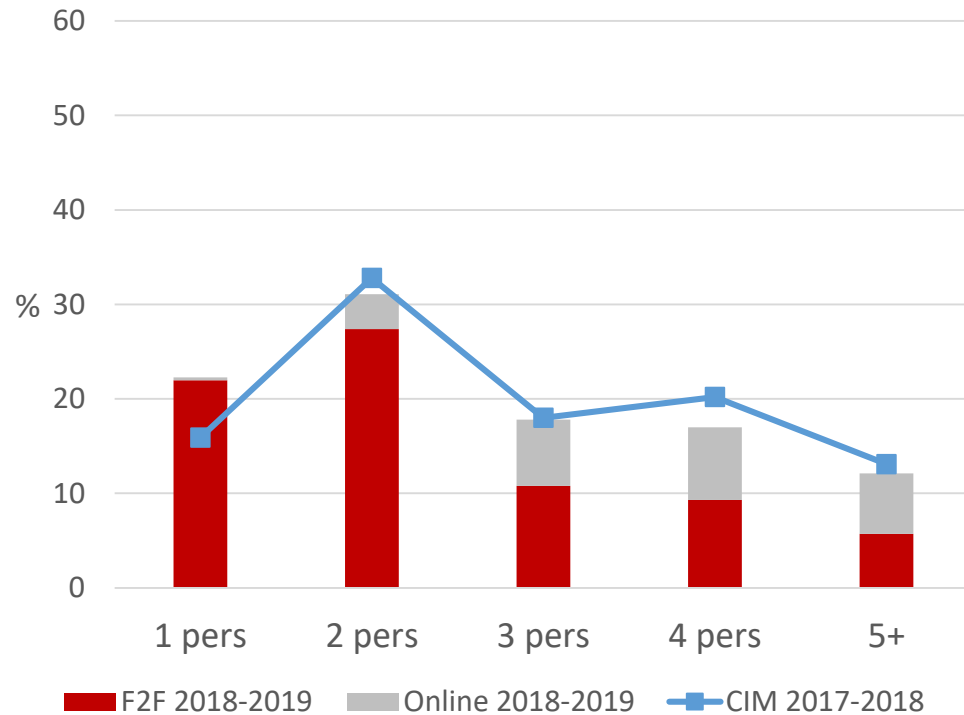


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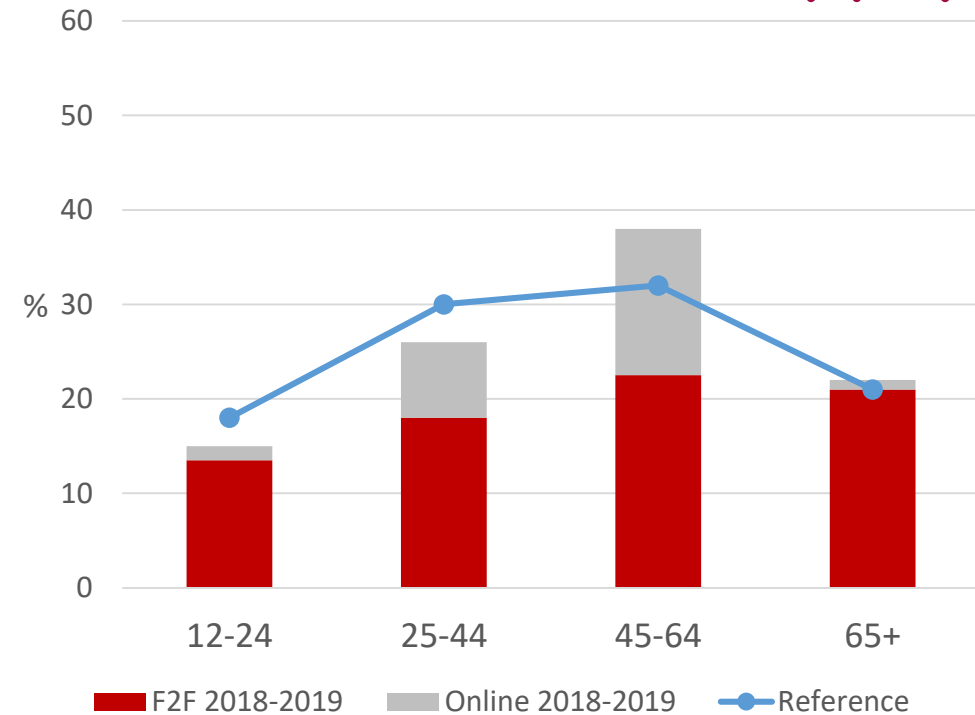
... in order to correct biases (as much as possible)

100% = sample total

Household size



Age groups



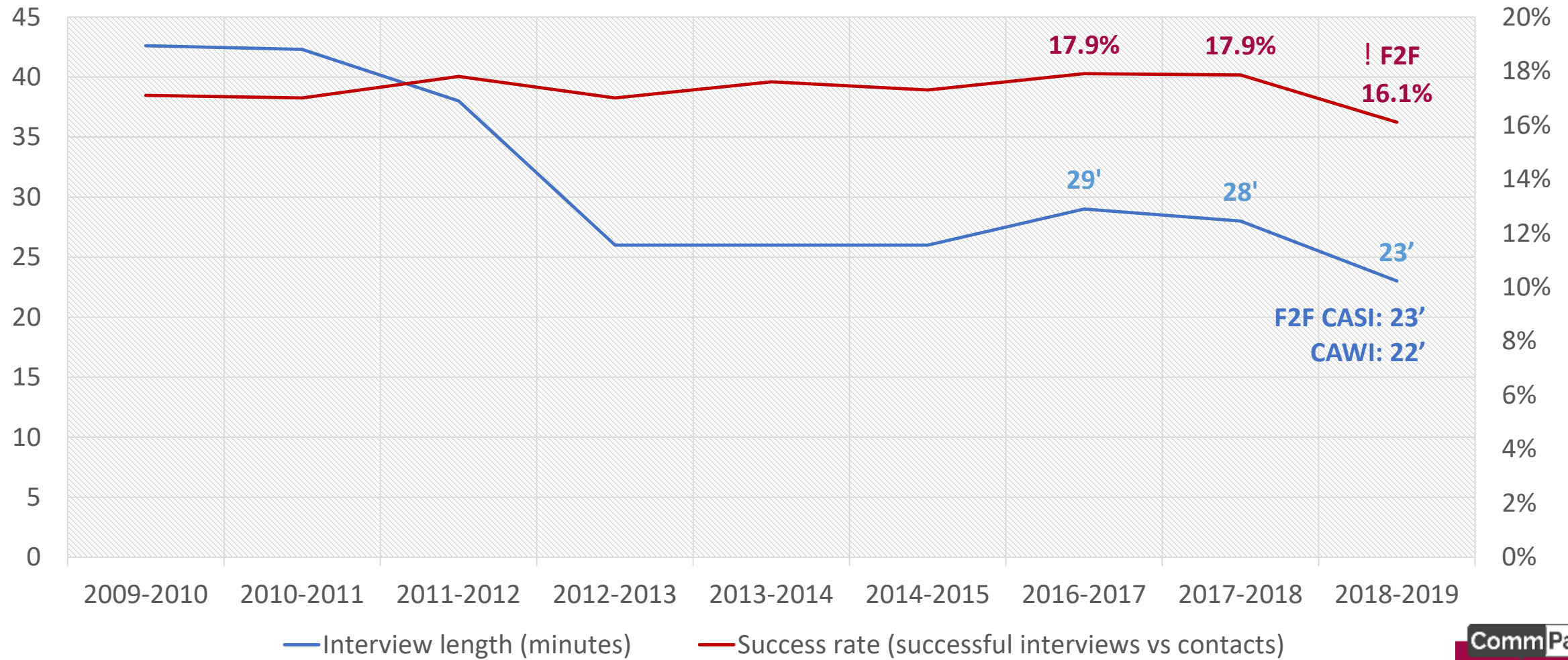
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So in a nutshell



Universe	Sample	Fieldwork	Recruitment	Interview
<ul style="list-style-type: none">• Adults12+ living in BE• 9.825.508 p.	<ul style="list-style-type: none">• 9 995 interviews• 1 respondent represents 983 individuals	<ul style="list-style-type: none">• 05/06/2018-31/05/2019	<ul style="list-style-type: none">• Face2face @ home (75%)• Access panel (25%)	<ul style="list-style-type: none">• F2F:<ul style="list-style-type: none">• CASI Computer Aided Self Interviewing (82% of F2F)• CAWI

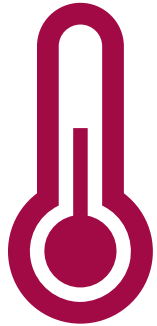
A long term comparison



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Available metrics today



Platforms

Paper

Digital

Versions

Paper

Digital
versions
(pdf+app)

Website

**Metrics
published**

Paper + digital versions

« Web »

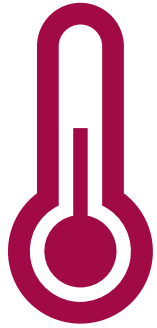
Total brand

Internal use

« Paper »

Intended

Available metrics today



Platforms

Paper

Digital

Versions

Paper

Digital versions
(pdf+app)

Website

Metrics published

Paper + digital versions

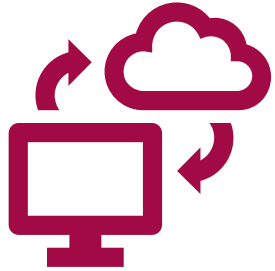
« Web »

Total brand

Internal use

« Paper »

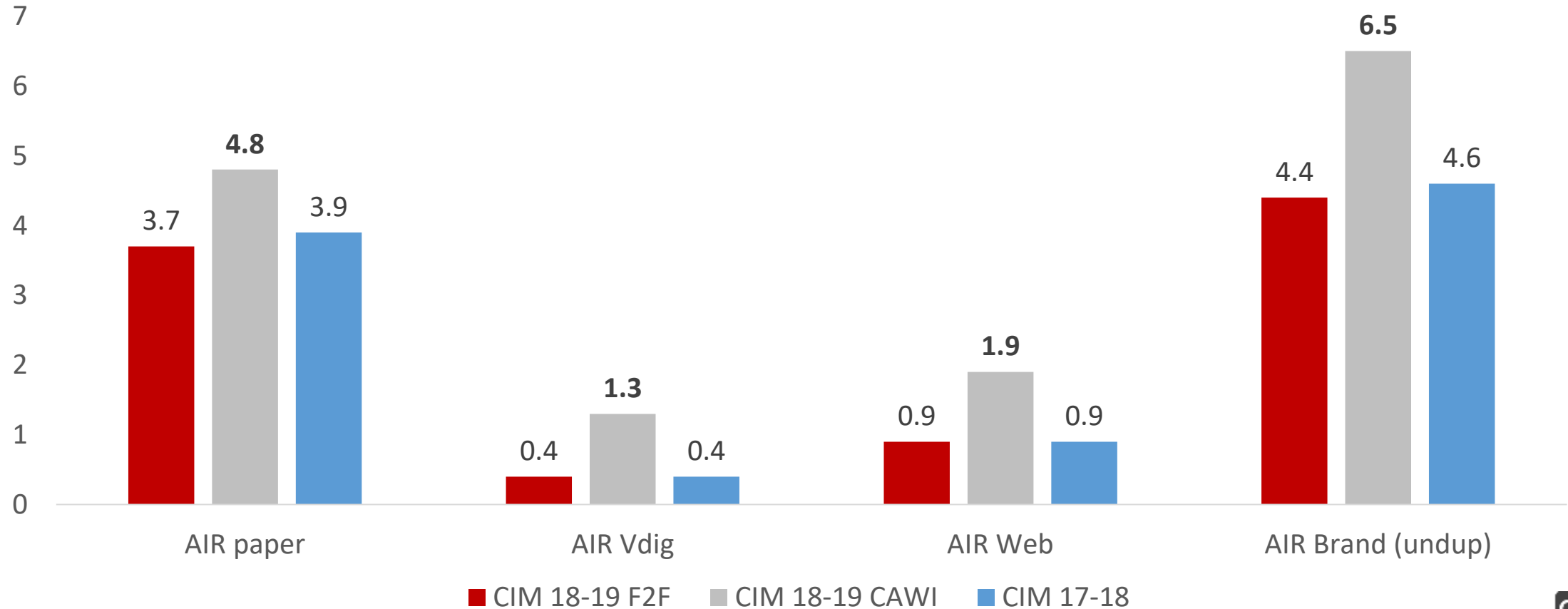
Most likely



Did **digital** make it all ?

CAWI (= digital interviews) weighted much in print

Average number titles read



Source: status 07/06/2019

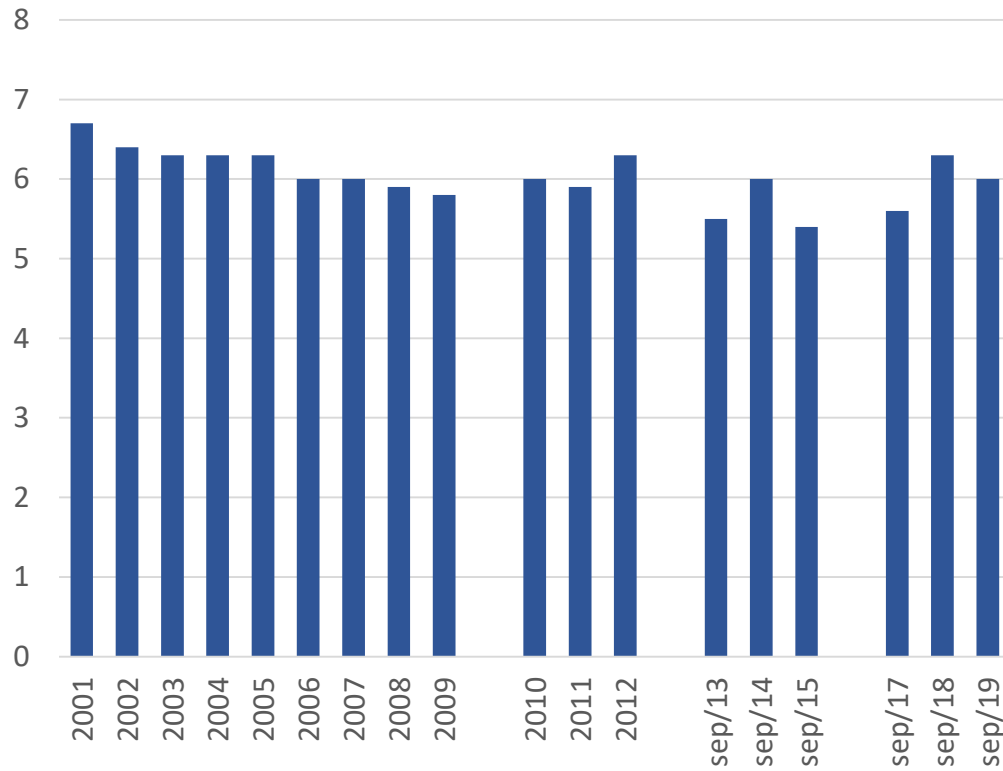
NCRS 2018-2019



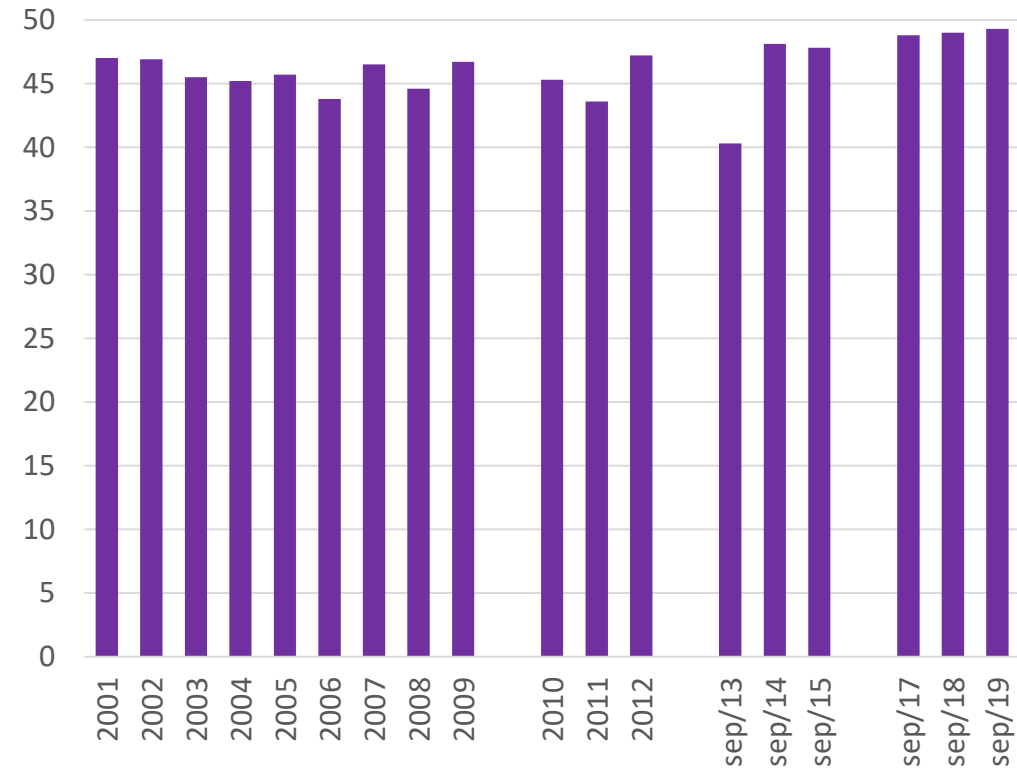


As usual 😊, cinema audiences proved resistant to methodology changes

Weekly reach %

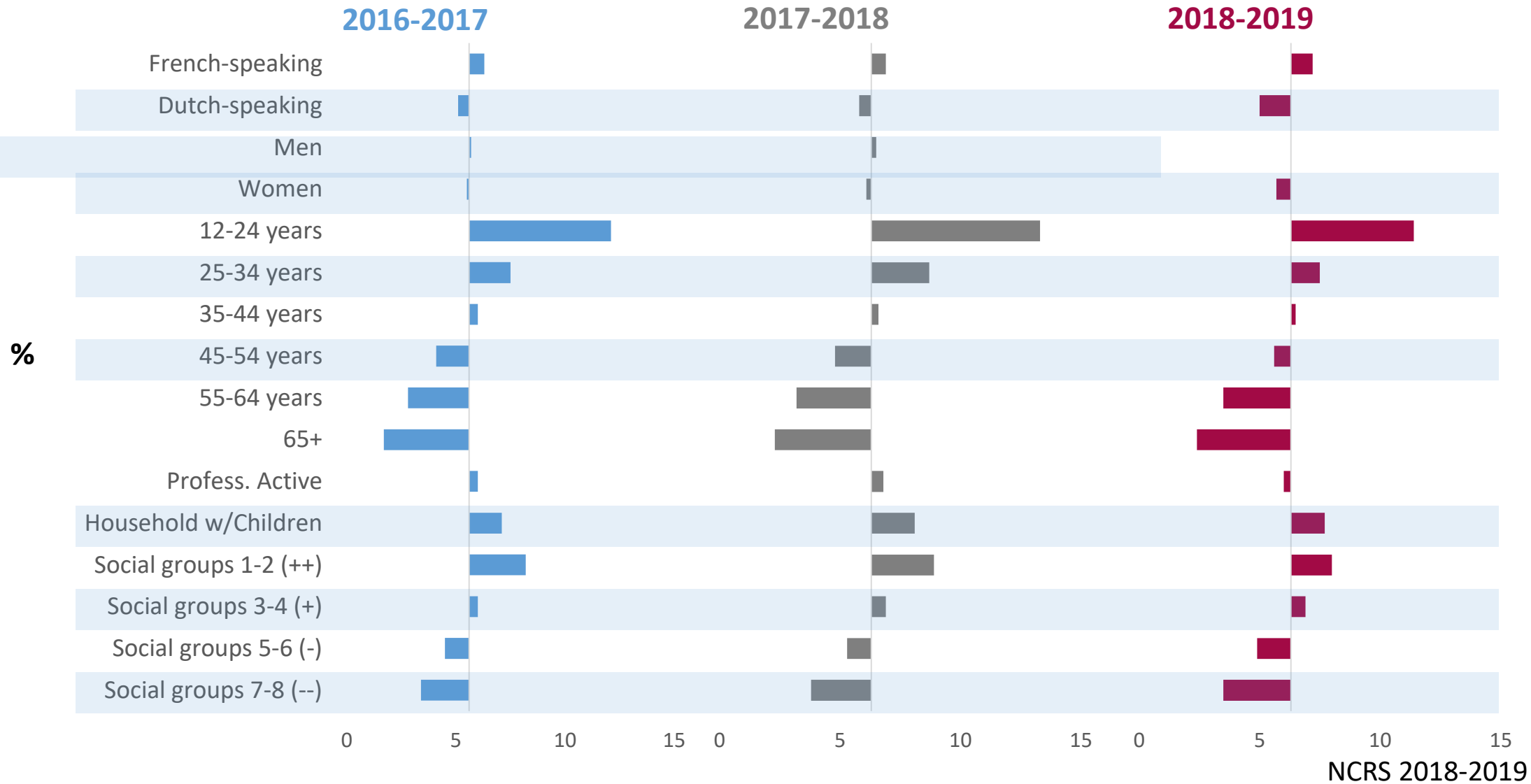


Total reach %





Cinema weekly reach per segment: search what makes a difference vs the past 😊

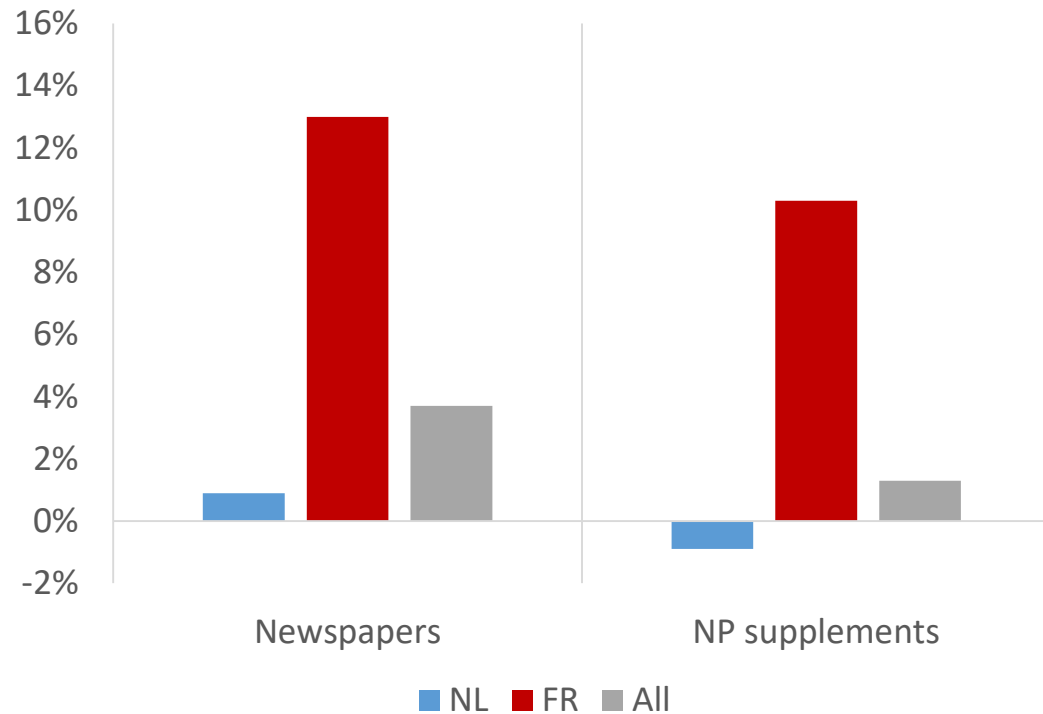




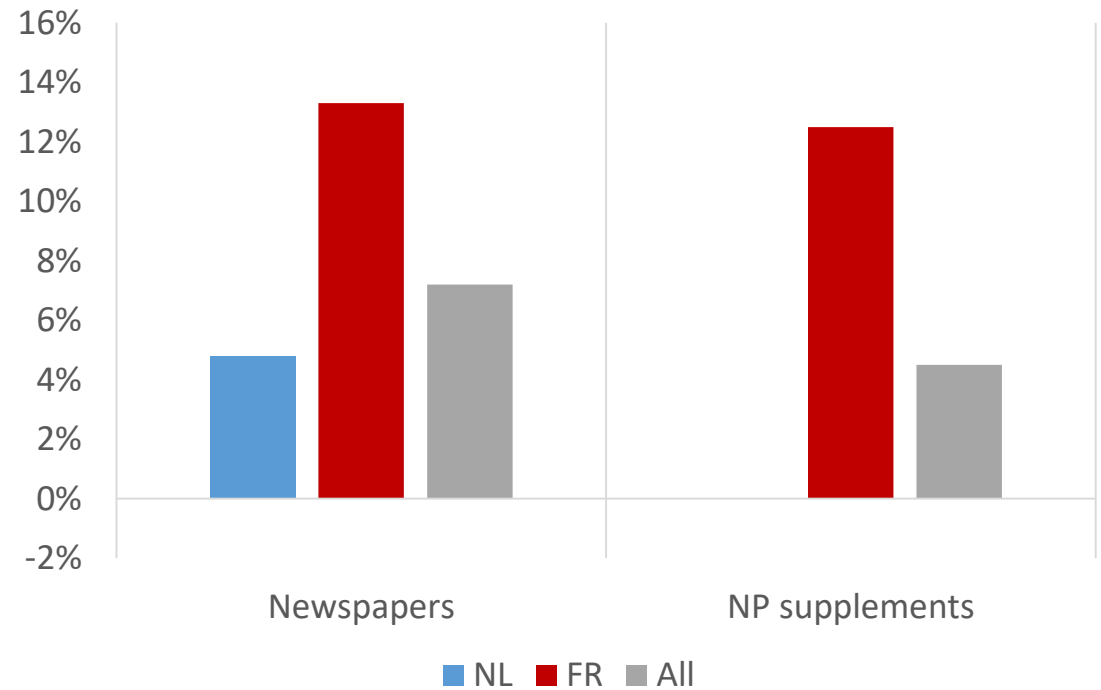
Helicopter view on **print** results

Newspapers & supplements 2019-2018 vs previous year: overview

YoY evolution AIR paper+digital

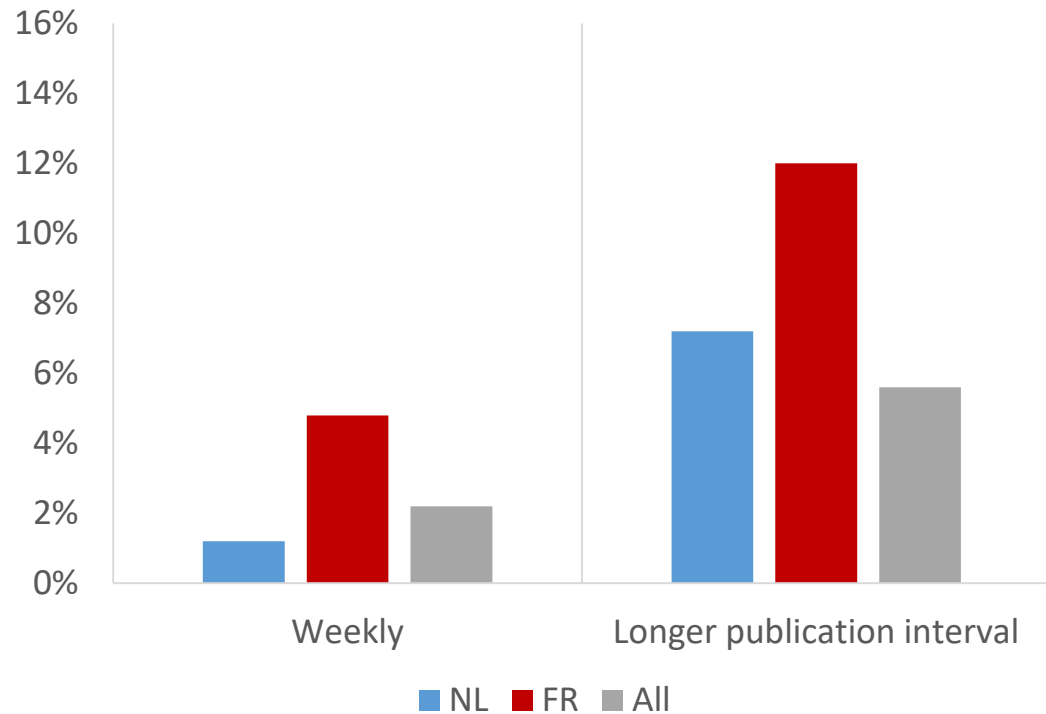


YoY evolution AIR total brand

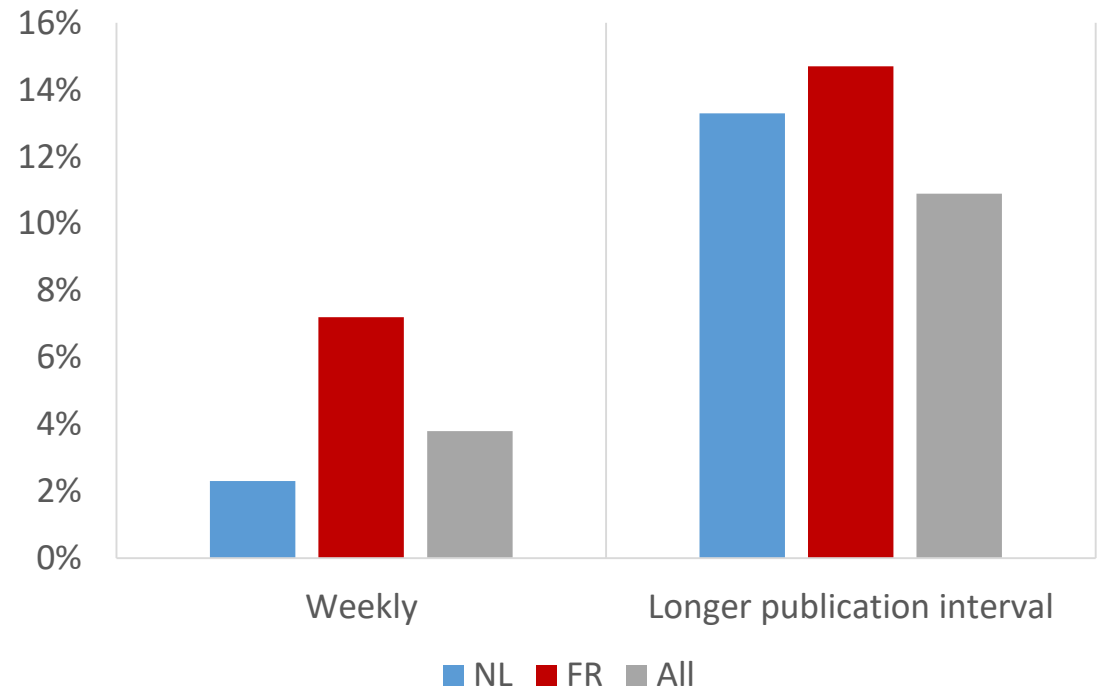


Magazines 2019-2018 vs previous year: overview

YoY evolution AIR paper+digital



YoY evolution AIR total brand



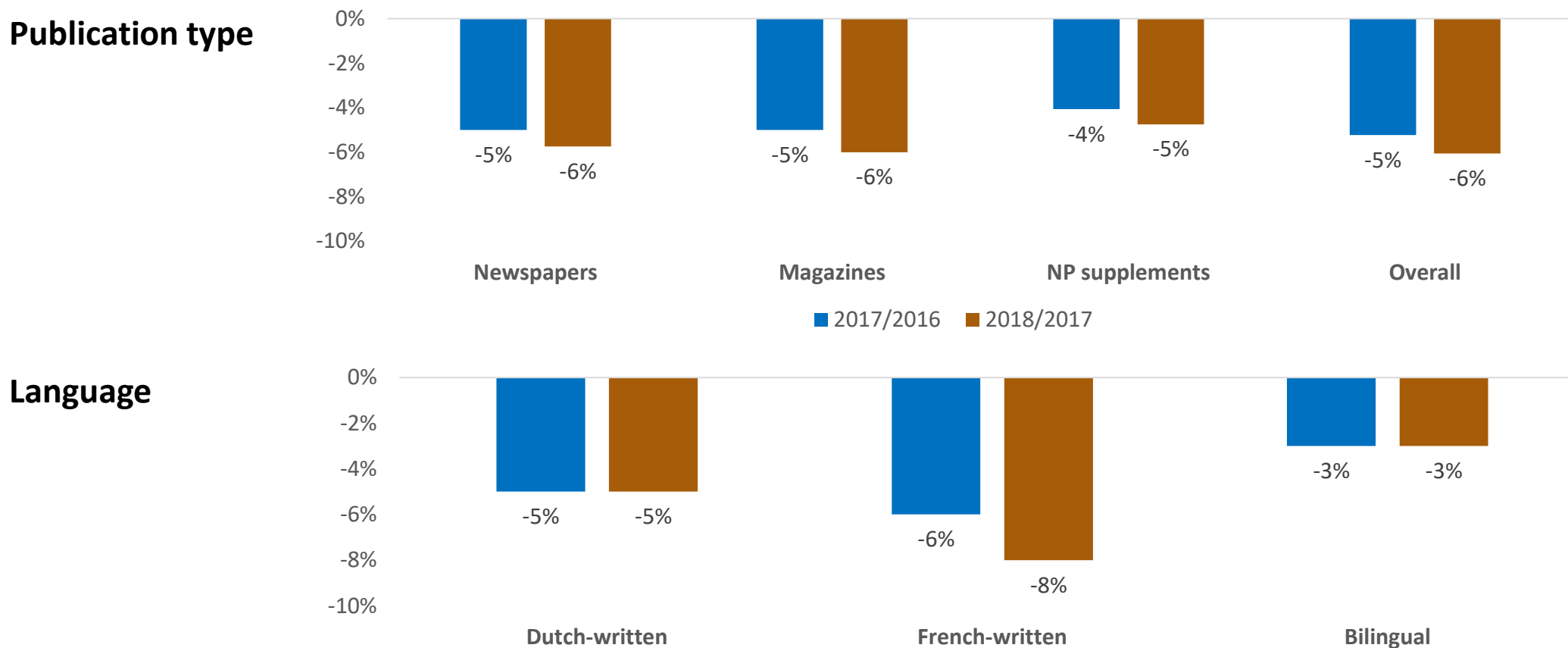


What we learn from **other** sources



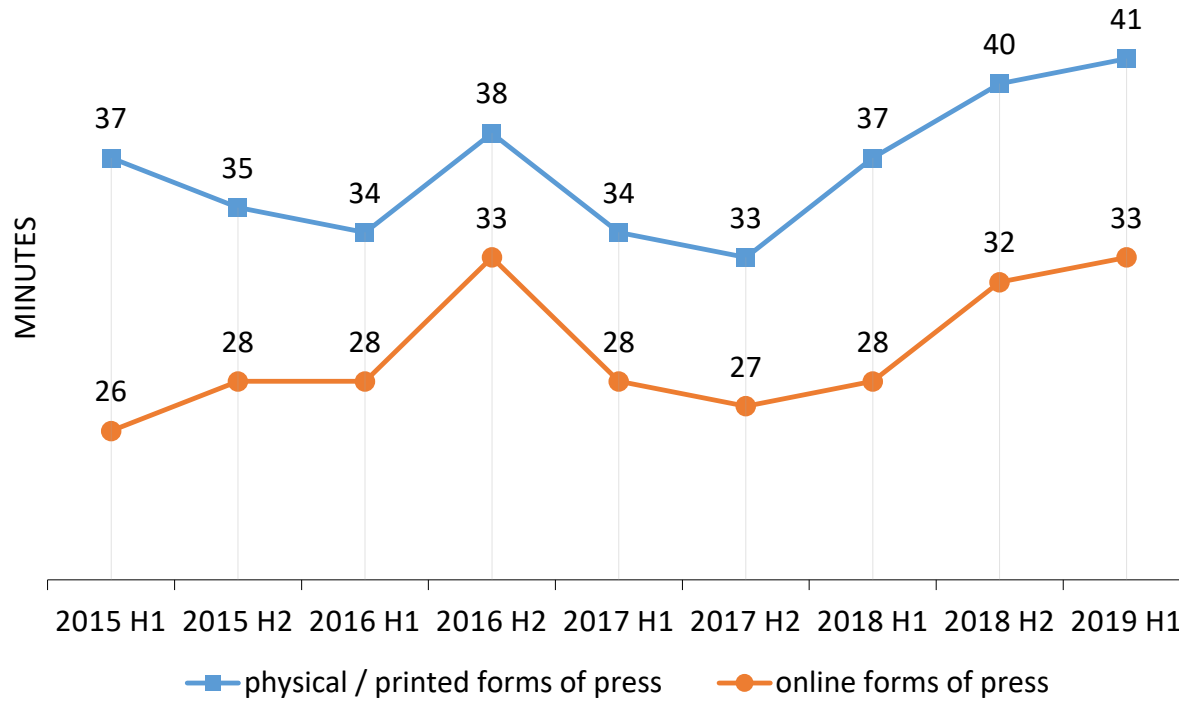
Yearly paper circulation eroding

Measurable print circulation, authenticated



Time spent reading press reported to be increasing in Belgium

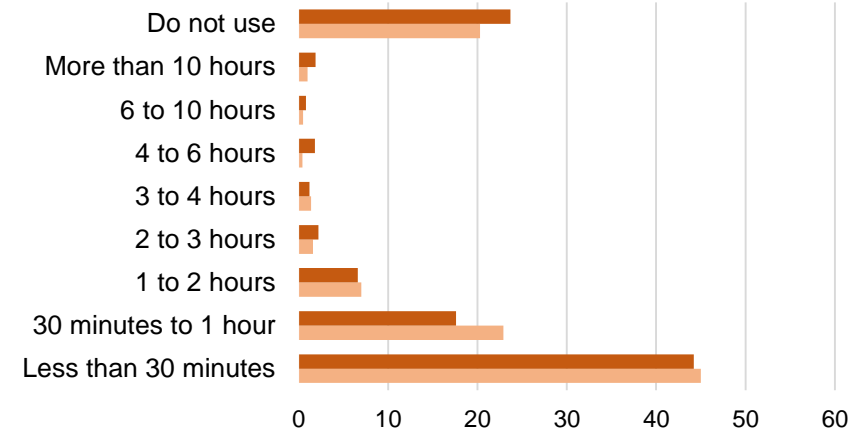
Estimated daily reading duration - Belgium



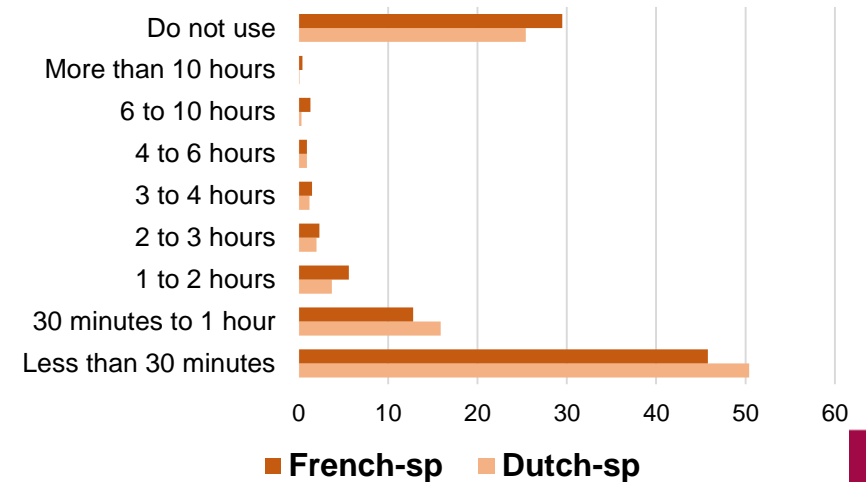
« On an average day, how long do you spend on online press? »
 « On an average day, how long do you spend on print press? »

Source : Global Web Index. Population 16-64 years

Detail online press 2019 H1



Detail printed press 2019 H1



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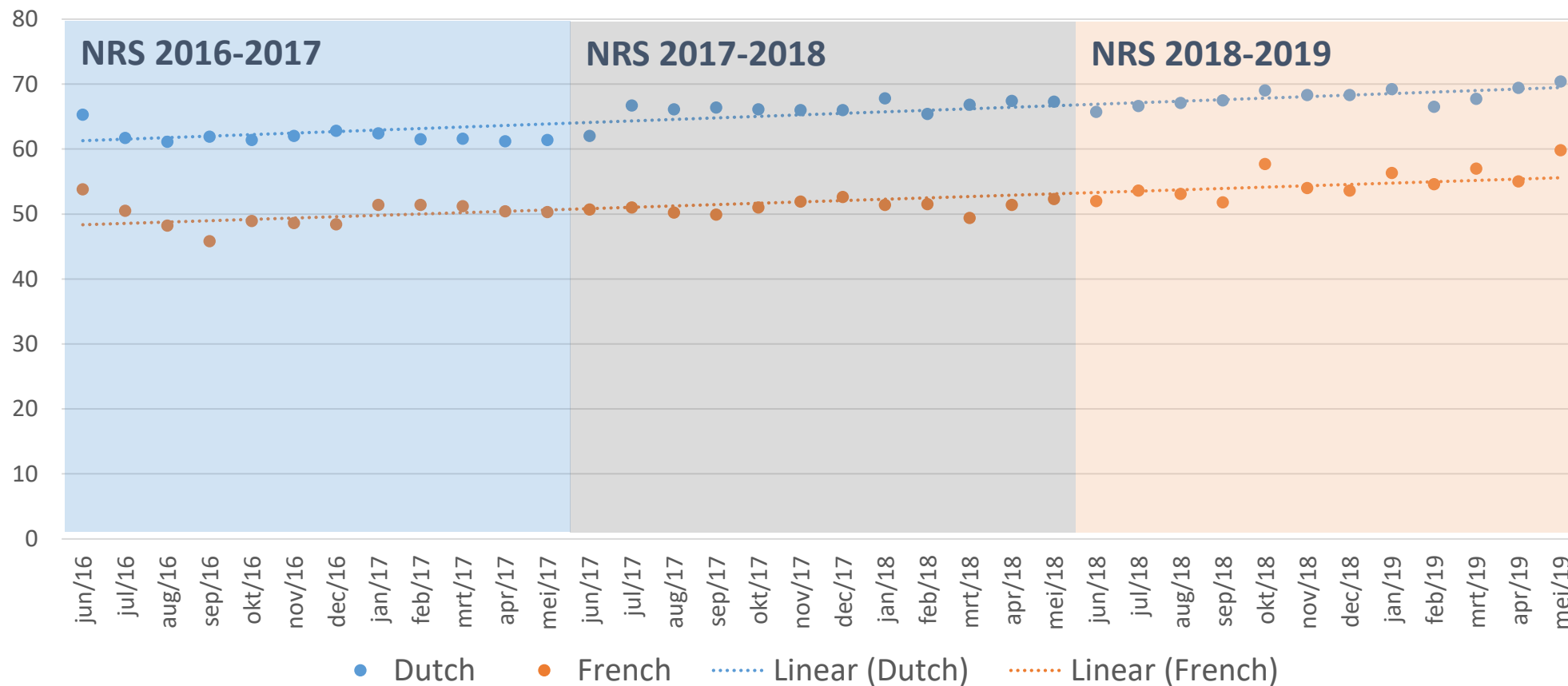
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Web reach of media brands (generally) on the rise

NP aggregate monthly reach %



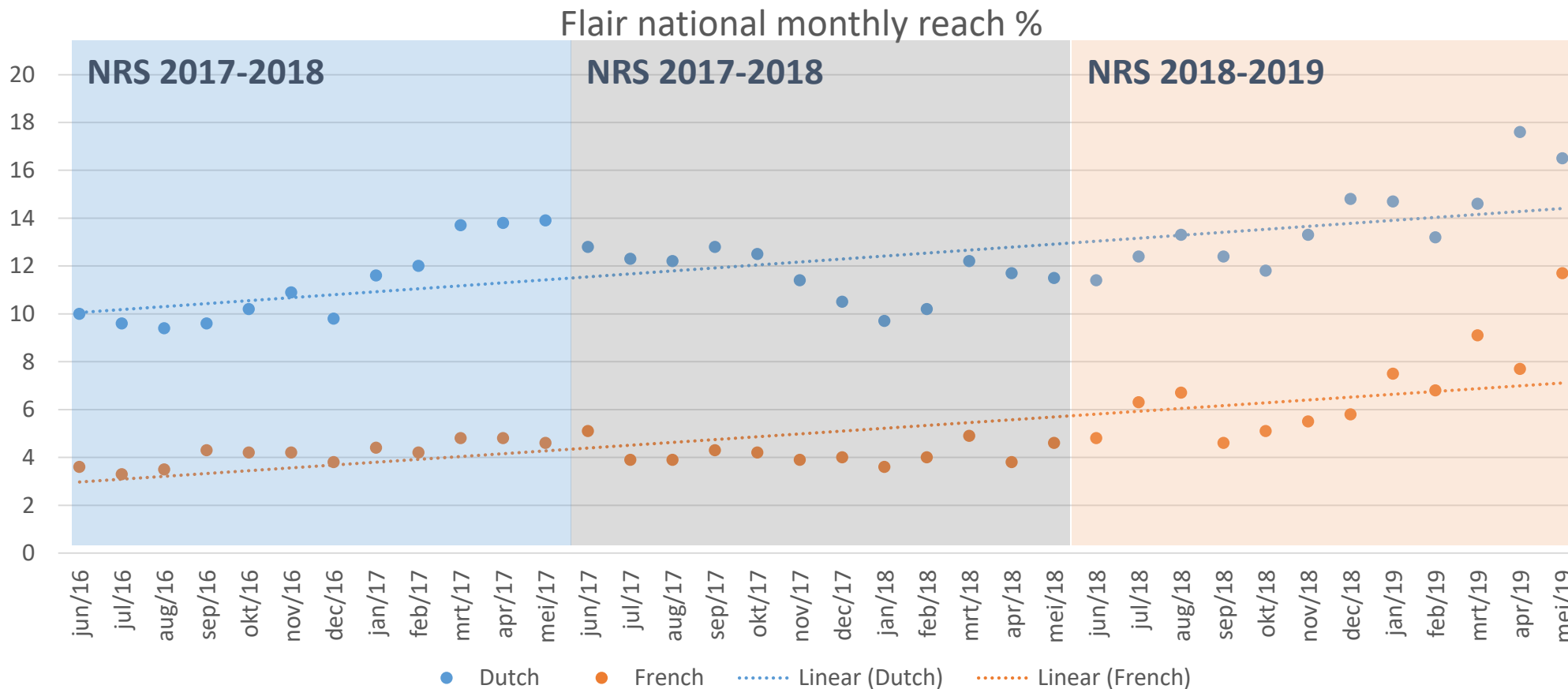
Source: CIM Internet

NCRS 2018-2019





Web reach of media brands (generally) on the rise



Source: CIM Internet

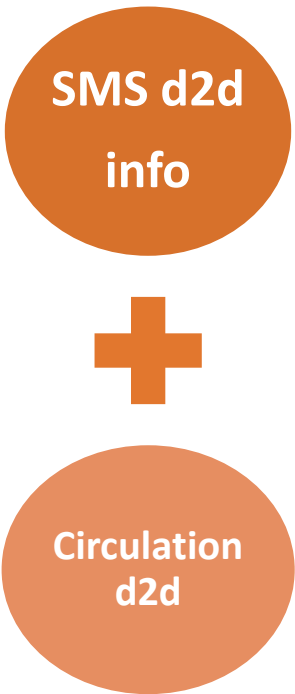
NCRS 2018-2019



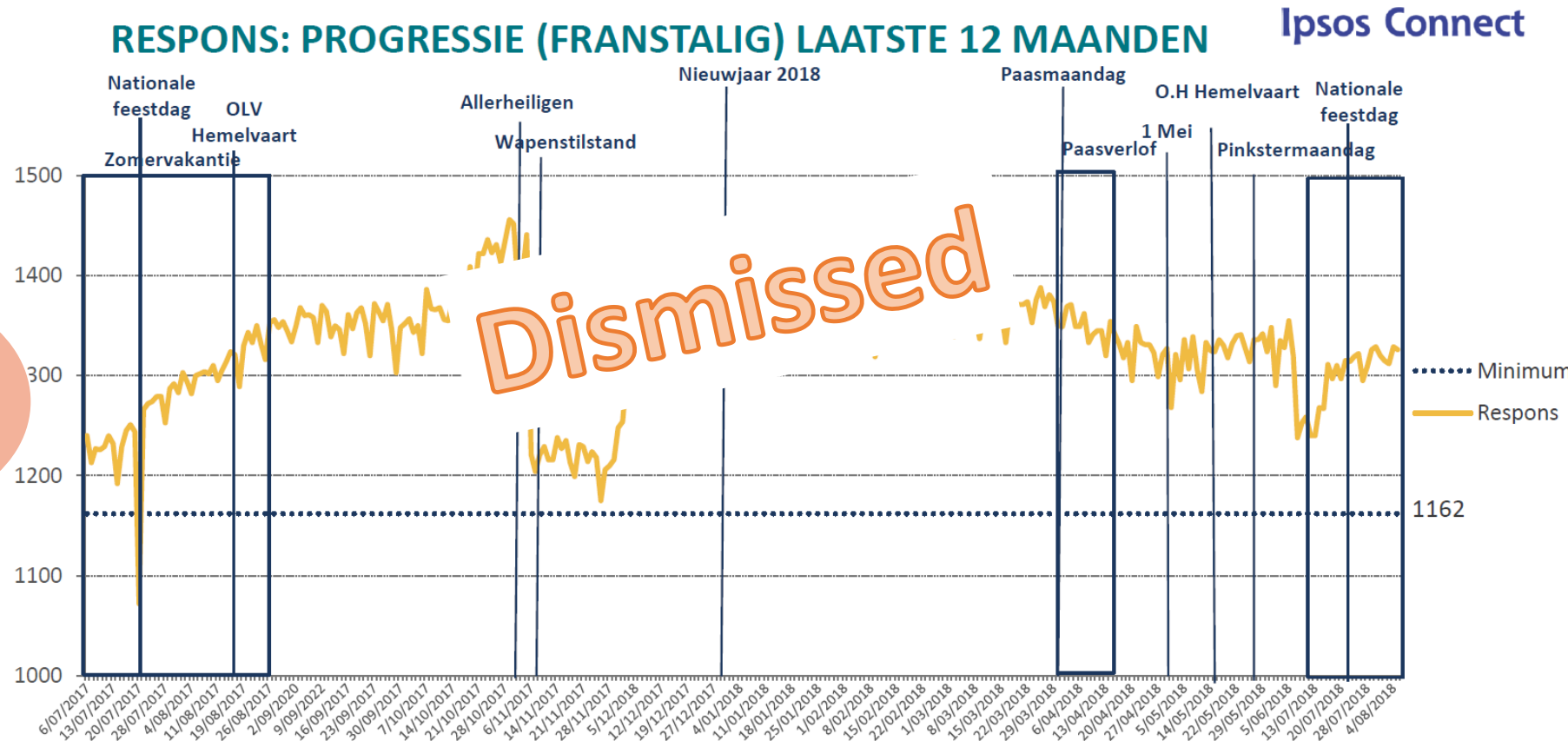


Next steps ?

Variable audiences for newspapers



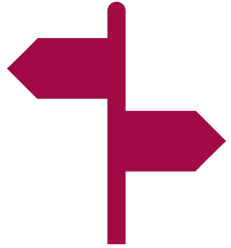
Variability model on NRS data



Fusion NRS & measured digital data



Expected
~~2019~~
2020



Conclusion: a new **reality**

« A new reality »

... eternal (CIM) story of **methods** impacting **results**

... importance of **digital** fairly documented: it is a major **reason** for change

... next publication should **confirm** this new reality

... high time for **digital content** being **more accurately measured**
than via declarations

... declining ambitions show the terrible **pressure** on publishers

As a final wink



“We're starting up a brand new day.”

Sting *Brand New Day* (1999)