HOW ONE RESEARCH COMPANY APPROACHES NEWSPAPER SECTION READERSHIP: AN OVERVIEW OF METHODOLOGY AND READING TRENDS

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Synopsis

There are many ways to read a newspaper. Some people read their daily paper carefully, section-by-section. Others skip directly to those particular sections which most interest them. Some will read the rest of the newspaper once they have perused their preferred sections; others won't bother.

In the United States newspaper advertising has been bought and sold largely on the basis of a newspaper's overall readership. Yet research exists which can furnish greater detail on consumers' reading habits and thus provide the advertising community with the a more accurate measure of the GRPs delivered by a newspaper ad campaign. This data is section readership information. Both major U.S. local market research companies provide such information. The value of such data have long been recognized by the editorial side of the U.S. newspaper business. However, knowledge obtained from analyzing section readership information can also be used to impact the planning and placement of newspaper advertising schedules. Newspaper section reading data offers advertisers the ability to increase both the reach and frequency to their campaigns by placing ads strategically in those sections which deliver the highest concentration of their target consumer.

This paper will overview how one of the local market researchers, The Media Audit, collects newspaper section readership information. It will also present top-line trends in section readership, specifically:

- From a national standpoint, are there significant differences in Adults 18+ audience levels for different sections of the newspaper? This national analysis will be based on a 74-market aggregate representing the markets surveyed by The Media Audit in 1996.

- Is there significant variance in newspaper reading habits between different age/gender groups? Do such differences become more pronounced when other factors are added to the equation?

- How do individual markets compare to the 74-market aggregate? How are they similar/different from each other?

The statistics this paper will employ in its discussion of newspaper reading come from The Media Audit, a syndicated product of International Demographics, Inc. In 1996 The Media Audit measured 74 U.S. metro areas. The markets measured range from small ones, such as Asheville, NC--the 176th-ranked metro, to New York, the largest U.S. market. In these markets demographic information, product and retail consumption data and measurements on local and regional media are obtained in a single phase telephone interview. Naturally, one of the key media measures obtained is newspaper readership.

Overview of Measurement Methodology for Newspaper Section Readership

Newspaper Questioning Sequence

Qx. 1:   7-day cume question regarding daily papers:

> My next question is about daily newspapers, local and national, that are published every day Monday through Friday. Did you read or look into a daily newspaper, either at home or away from home during the past 7 days?

Qx. 2: Weekly cumes (dailies):

> Please name the weekday daily newspapers, local and national, you read or looked into during the past seven days? What other daily newspapers did you read or look into during the past 7 days? Any others?

Qx. 3:   Yesterday reading question for specific papers

Qx. 4:   Time spent reading yesterday's paper.

Qx. 5: Sunday cume measurement:

> Now I would like to ask you about Sunday newspapers, both local and national. During the past 4 weeks, did you read or look into a Sunday newspaper?

Qx. 6: Readership of specific papers over the past four weeks

Qx. 7: Papers read last weekend.

> Note: The entire question sequence described above for the daily and
> Sunday papers is unaided.

Only after all newspaper audience measures are obtained does the interviewer begin asking the section reading sequence. It is asked If the respondent answered affirmatively to either question #1 or #5, above. Using these particular cume measures insures a sufficient number of newspaper reader respondents for use as a base for the section questions.

Qx. 8: Sections of the paper does respondent read.

> Now I want to find out how often you read or look into the different sections of the daily newspapers. Do you read the front page section regularly, occasionally, or never? How about the _____ section?

The section reading is an *aided* questioning sequence. Fourteen sections, including editorial, business, sports, classified, food, real estate, neighborhood/local news, weekend travel section, as well as Sunday advertising inserts and the TV book in the weekend paper are asked.

Section Classification

Given that The Media Audit interview instrument is the telephone, our goal is to classify section readership in a manner that was easy for the respondent to recognize. To do this, we employ a classification pattern that is standard in brand or product research; namely to group consumer usage patterns according to heavy, moderate, light, and non-use. Using a similar criteria allows us to determine "consumption" of a section in a manner that equates to readership and yet: a.) can be easily understood and communicated back by the respondent; and b.) allows us to distinguish levels of section readership.

We condense the four-point product use gradation (heavy, moderate, light, non-use) to a three point scale. Until a few years ago we employed a four point scale: regularly, occasionally, seldom, never. However, we simplified to the current three point question since statistically it is beyond the scope of our telephone interview to define the difference between seldom and occasionally to the respondent without stringent definition. Classifying by regular, occasionally or never yields three clearly distinguishable section readership groups: a.) loyal readers; b.) those who read a section sporadically; and finally, c.) those who never read. Moreover, it has a distinct advantage over asking "yesterday sections" readership, which risks de-classifying the occasional reader as a non-reader.

Positioning Section Readership in the Questionnaire

In an ideal interviewing scenario it would seem desirable to ask the respondent section reading immediately after they've indicated readership of a particular paper. However, this is impractical for two reasons.

* To do so would significantly increase the length of the interview, which would cause respondent fatigue and in turn would adversely affect response rates.

* To keep the interview length the same (25-27 minutes) and fit in these questions would mean sacrificing important product category questions.

The way The Media Audit currently positions the section reading sequence--immediately after obtaining the newspaper readership data--has the advantage of obtaining the respondents' habits in this area while newspapers are still top-of-mind.

Section Labels

Assigning section labels poses yet another challenge for the newspaper ratings services. Newspapers differentiate themselves by branding their sections. For example, local news is the "Neighborhood News" in the Houston Chronicle, and the "Metro" in the New York Times. The Media Audit addresses this possible title confusion by assigning generic section titles, e.g., TV Book, Food, Sports, Business. This enables us to maintain questionnaire standardization across all markets.

Section Reading Trends

The Media Audit 1996 Report shows that across the 74 markets measured that year (124,606 interviews with A18+), 81% of the Adult population read either a daily newspaper over the past week or a Sunday paper over the past four weeks.

Table 1: Overall Reading (Weekday or Sunday Cume)

Age Cell	% Reading Paper	% Total Readers
A18+	81	100
Men	81	48
Women	80	52
18-34	74	32
35-64	83	52
65+	83	16

• A35+ are newspaper's strength; but 74% of younger adults read a paper and account for a third of all newspaper readers.

• Above statistics point up limits of looking at total readership; it fails to illustrate the diversity of reading patterns that exist. Two options for getting a picture of that diversity. First, look at more specifically defined targets. This is already being done. Secondly, analyze section reading patterns, ideally in light of specific targets.

National Section Reading Trends

Table 2: Percent Reading: Adults, Men, Women

Section Read	A18+	M18+	W18+
Main News	68	69	67
Weekend TV Book	50	45	54
Weekend Ad Inserts	48	37	59
Sports	39	58	21
Business Section	37	44	30
Movies/Entertainment	37	30	44
Neighborh./Local	34	27	41
Weekday Food	33	21	46
Editorial	33	33	33
Life/Style/Fashion	31	17	44
Weekend Travel	26	22	29
Real Estate	22	17	27
Classified	21	21	21

• Table 2 indicates how reading of various sections varies widely from cume audience (81%) even among total Adults 18+. Range is from a high of 68% (Main News) to the low of 21% (Classified).

• Further differences are apparent when sections are analyzed by gender. Top five sections for men and women are:

Men 18+		Women 18+	
Main News	69%	Main News	67%
Sports	58%	Wknd. Ads Ins.	59%
Wknd. TV Book	45%	Wknd. TV Book	54%
Business	44%	Wkday. Food	46%
Wknd. Ad Ins.	37%	Tie:	44%
		Life/Style	
		Movies/Ent.	

• While three of the top five sections are common for both men and women (Main News, TV Book, Ad Inserts), notice how *degree* of readership varies for these sections (e.g., Ad Inserts: 59% Women; 37% Men).

• This difference in degree of reading becomes even more apparent when looking at the other sections--Movies/Entertainment: 44% W18+ readership vs. 30% M18+; Real Estate 27% W18+ and 17% M18+.

- Greater percentage of women appear to read more sections than men: seven sections have W18+ readership of 40%+ versus four for M18+.

- Note also high degree of variance from A18+ statistics (+/-10%) occurs for 10 sections.

- The importance of section reading is apparent from looking just at Adults, Men, and Women. Table A in the Appendix shows that segmenting by age groups also yields insights into section reading habits. Some of the more dramatic differences are

    1. A18-34:   Classified: 43% over norm; Neighborhood/Local: 26% below norm.

    2. A65+:   Classified dramatically underdelivers (10% read vs.21%)
                      Food (51% vs. 33%).

    3. A35-64:   Only four sections vary by +10% from the A18+.

Very rarely is media bought against such simple targets as M18+ or A18-34 target. The following chart looks at section reading by a more segmented target: age plus educational level and job occupation ("Yuppies" being defined as A18-34, college educated and working in a professional/managerial job).

Table 3: Yuppie Section Reading

Section Read	A18+	A18-34	Yuppies
Read any weekday/Sunday	81%	74%	80%
Main News	68	**50**	**60**
Weekend TV Book	50	**40**	**39**
Weekend Ad Inserts	48	**46**	**44**
Sports	39	**41**	**42**
Business Section	37	25	**38**
Movies/Entertainment	37	**38**	**38**
Neighborh./Local	34	25	25
Weekday Food	33	18	18
Editorial	33	17	19
Life/Style/Fashion	31	26	28
Weekend Travel	26	16	23
Real Estate	22	14	18
Classified	21	30	19

Note: Boldface indicates top 5 sections.

- Top five sections among this educated, white collar, younger adult segment parallel the leading sections for both Adults 18+ and A18-34. Moreover, while three of these sections show lower reading levels than among A18+, this is offset by the readership of the others (Sports, Business and Movies/Entertainment) all of which score slightly higher among Yuppies.

- While this particular segment of younger adults still underperforms relative to A18+, the number of sections where this underdelivery is 10%+ is six versus nine for A18-34. The sections most affected are Food (-45% vs. A18+) and Editorial (-42%).

Local Reading Trends

How does reading in specific local markets compare to the national statistics? There is variance from the 81% norm; it ranges from a high of 90% in Buffalo to a low of 72% in Los Angeles.

Table 4: Readership by Market (9 of 74 measured)

Market	Wkd/Sun Cume
74-Market Avg.	81%
Buffalo	90
Madison	88
Boston	86
Chicago	83
St. Louis	81
Seattle/Tacoma	79
Atlanta	77
Houston	74
Los Angeles	72

For time purposes, this paper shares local statistics from just two markets: Atlanta and Boston. Both are large markets, ranking numbers 12 and 10, respectively in terms of metro size. Atlanta's newspaper reading is lower than the national average and Boston's is higher.

Table 5: A18+ Local Section Reading

Section (A18+)	National	Atlanta	Boston
Read any wkd/Sun	81%	77%	86%
Main News	**68**	**59**	**75**
Weekend TV Book	**50**	**48**	**41**
Weekend Ad Inserts	**48**	**47**	**44**
Sports	**39**	**38**	**37**
Business Section	**37**	**38**	**38**
Movies/Entertainment	**37**	**31**	35
Neighborh/Local	34	23	34
Wkday Food	33	15	30
Editorial	33	26	**37**
Life/Style/Fashion	31	30	32
Weekend Travel	26	27	23
Real Estate	22	21	23
Classified Ads	21	17	17

NOTE: Boldface indicates top sections.

The simple A18+ comparison shows:

- Commonality in terms of top five sections read.

- Despite Boston's higher overall readership (86% vs. 77% for Atlanta), reading of several sections is quite similar across markets: e.g., Classified (both at 17%) Ad Inserts (47% Atl. and 44% Bos).

- There is a *somewhat* higher degree of underperformance versus the national in Atlanta where 10 sections perform below the national average. Seven sections underperform in Boston

- Dramatic differences between the markets do exist: e.g., Main News, Food, Neighborhood/Local

Table 6: Gender Analysis: Atlanta

Section	A18+	M18+	W18+
Main News	59	62	57
Weekend TV Book	48	42	53
Weekend Ad Inserts	47	35	59
Sports	38	59	18
Business Section	38	48	28
Movies/Entertainment	31	24	38
Neighborh/Local	23	23	38
Wkday Food	15	15	41
Editorial	26	28	25
Life/Style/Fashion	30	18	42
Weekend Travel	27	21	32
Real Estate	21	15	26
Classified Ads	17	16	19

- Section reading by gender varies significantly from total Adult reading in Atlanta for 10 out of 13 sections measured.

- Comparing M18+ habits in Atlanta to national: appreciable variance (+20%) in five sections. Percents range from -15% (Neighborhood/Local) to -29% (Food).

- Atlanta women also vary from their national counterparts in five sections but the variances are much smaller, ranging from -11% to -24%. Only one section was higher than 20% (Editorial: 21%)

The same analysis, done for Boston is on Table B in the Appendix. It shows several differences from either the national gender breakouts or those from Atlanta; e.g., gender variance of +20%occurs in eight of the 13 sections measured.

Table 7: National versus Local for Yuppies

Section Read	Nat'l. Yuppies	Atlanta Yuppies	Boston Yuppies
Main News	**60**	**50**	**66**
Weekend TV Book	**39**	**47**	27
Weekend Ad Inserts	**44**	**42**	**39**
Sports	**42**	**44**	**42**
Business Section	**38**	**41**	**39**
Movies/Entertainment	**38**	34	**30**
Neighborh./Local	25	26	25
Weekday Food	18	12	14
Editorial	19	19	22
Life/Style/Fashion	28	28	**29**
Weekend Travel	23	19	19
Real Estate	18	22	19
Classified	19	16	18

NOTE: Boldface indicates top sections.

Variances: Four sections in Atlanta with differences greater than 20%; three in Boston. Overall this reinforces the similarity with the national average for Yuppies in these two markets.

Differences between markets:

- Top five sections read in Atlanta mirror the sections most preferred by Yuppies on a national basis, but in Boston, the TV Book does not make the most preferred list.

- Only one section--the TV Book--has a 20% variance (47% of Atlantans read vs. 27% of Bostonians). Differences in reading for other sections are 15% or less.

Conclusions

While this paper has extensively outlined the methodology one research company uses to collect section reading information, it has only scratched the surface in terms of the trends it presents regarding section readership patterns. There are many other important issues relating to section reading, e.g., year-to-year trends; section duplication or exclusive reading of particular sections. All of this type analysis should be done against product-specific as well as age, gender and lifestyle target audiences. Finally, there is the issue of section reading versus viewing/listening to a particular daypart. This too is worth exploring.

However, our brief overview of section readership has brought out several points that are of real importance to the buying and selling of newspaper ad space--

- People read the newspaper in many different ways; what's important to one person is of no significance to another. Even looking at the broadest category--A18+--challenges the practice of evaluating newspapers on the basis of total audience. While 81% of U.S. A18+ read the paper, Main News, the most read section, delivers only 68% of these people.

- Differences in reading between markets are vitally important, especially when planning and executing a multi-market schedule. An ad running in the Main News section of an Atlanta paper may deliver 59% of the A18+; that same ad, placed in the Business section reaches 38% of A18+.

- Existing databases such as The Media Audit have the information agencies need to fine-tune targets. Find out who the best prospects are and incorporate those people into the definition. Precise targeting will lead to accurate assessment of a vehicle's efficiency in reaching the best prospects for a client's product.

- Certain sections (e.g., Main News, TV Book, Sports, Business) seem to be perennial top performers, but it's important to look beyond these rankings to the *degree* of reading across different targets and markets.

    1. Main News: #1 in every analysis. But whereas 68% A18+ read nationally, 75% read in Boston and 57% in Atlanta.

    2. Business: Even looking only at national numbers, wide variance is apparent. Overall 37% A18+ read; this drops to 25% among A18-34 and bounces back to 38% for Yuppies.

- Section reading information is good news for the newspapers. Rather than trying to sell against such perceptions such as "newspapers can't reach younger readers," the papers have the tools to show how placement in specific sections that will deliver a high concentration of such a target audiences.

- For everyone involved in newspaper negotiation--agencies, advertisers, newspapers--section reading information is a powerful negotiating tool.

Appendix

Table A: % Reading by Age Groups

Section Read	A18+	A18-34	A35-64	A65+
Read any weekday/Sunday	81%	74%	83%	84%
Main News	68	**50**	**74**	**87**
Weekend TV Book	50	**40**	**51**	**68**
Weekend Ad Inserts	48	**46**	**50**	46
Sports	39	**41**	38	37
Business Section	37	25	**41**	**48**
Movies/Entertainment	37	**38**	**38**	33
Neighborh./Local	34	25	**38**	40
Weekday Food	33	18	36	**51**
Editorial	33	17	36	**59**
Life/Style/Fashion	31	26	33	35
Weekend Travel	26	16	29	35
Real Estate	22	14	25	30
Classified	21	30	20	10

Note: Boldface type denotes top 5 sections.

Table B: Gender Analysis: Boston

Section (A18+)	A18+	M18+	W18+
Main News	75	75	75
Weekend TV Book	41	36	45
Weekend Ad Inserts	44	34	54
Sports	37	58	18
Business Section	38	46	31
Movies/Entertainment	35	28	42
Neighborh/Local	34	28	40
Wkday Food	30	16	43
Editorial	37	33	40
Life/Style/Fashion	32	18	45
Weekend Travel	23	19	27
Real Estate	23	17	28
Classified Ads	17	16	17

Anyone wishing more information on section readership methodology or trends please feel free to contact International Demographics.