

### 3.3

## HOW QUALITY SUNDAY NEWSPAPERS ARE READ

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The changing face of the quality Sunday newspaper market in Britain has been creating new problems for media researchers and media planners.

Traditionally, a significant proportion of press media planning is based on the National Readership Survey, and the measure of average issue readership is the one commonly used for comparing the quality Sunday papers, but how useful is average issue readership in the light of the significant increase in the pagination levels and number of sections of the three 'quality' Sunday newspapers: *The Sunday Telegraph*, *The Sunday Times* and *The Observer*?

For example, from the first quarter of 1986, to April/May 1988, the issue size of *The Sunday Telegraph* increased from an average of 40 pages per issue, to 48; *The Observer* grew from 56 to 68 pages, and *The Sunday Times*, growing dramatically by 43%, from an average issue size of 81 pages to 116.

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#### Average issue sizes

|                      | Jan-Mar<br>1986 | April-May<br>1988 | Change<br>% |
|----------------------|-----------------|-------------------|-------------|
| The Sunday Telegraph | 40              | 48                | + 20        |
| The Observer         | 56              | 68                | + 21        |
| The Sunday Times     | 81              | 116               | + 43        |

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The other main change has been the extent to which *The Sunday Times* has become a multi-section newspaper.

In April 1988 *The Sunday Telegraph* and *The Observer* were in roughly the same format as

two years previously, whereas *The Sunday Times* was publishing three sections plus magazine in 1986, and by April 1988, it was publishing seven sections plus the magazine.

(Note: At the time of this book going to press, *The Sunday Times* has eight national sections, one regional section for Scotland, plus a magazine).

The difficulty in attempting to assess the readership of quality Sunday newspapers in Britain, has been the fact that the National Readership Survey (NRS) uses a definition of a reader that provides no information on the reading of a particular section. How does an advertiser know if the reader even opens the section containing his advertisement? It is perhaps a reasonable assumption that some sections of the bulkier papers are not read at all by some people. By contrast, it is likely that *The Sunday Telegraph* is read or paged through by most of its readers, with the consequence that the potential advertisement exposure for *The Sunday Telegraph* will be closer to its average issue readership, than will be the case for Sunday newspapers with a considerable number of sections.

In the Spring of 1988, there was no sign that JIC-NARS (The Joint Industry Committee for National Readership Surveys) was going to address the weakness of average issue readership as a reasonable measure of readership of the multi-section newspapers with anything like the speed required by media planners and buyers. As publisher of what was then a one section newspaper, *The Sunday Telegraph* was therefore ideally placed to investigate our hypotheses, and we commissioned Research Services Ltd to carry out the research.

## THE RESEARCH OBJECTIVES AND METHODS

The survey was based on a quota sample of ABC1 adults (the managerial, professional, administrative, supervisory and clerical groups) aged 20 plus, with assignments controlled regionally to yield equal numbers of men and women.

Informants were eligible if they had read or looked at *The Sunday Telegraph*, *The Observer* or *The Sunday Times*, on the Sunday immediately before the interview. Fieldwork was conducted in-home, Monday to Wednesday April 11th – 13th, and on Monday to Wednesday on the following week.

The formats of the issues covered by our research were as follows:

|                      | Date 1988 | Pages | National sections (Excluding colour magazines) |
|----------------------|-----------|-------|------------------------------------------------|
| The Sunday Telegraph | April 10  | 48    | 1                                              |
|                      | April 17  | 48    | 1                                              |
| The Observer         | April 10  | 88    | 6                                              |
|                      | April 17  | 76    | 5                                              |
| The Sunday Times     | April 10  | 136   | 7                                              |
|                      | April 17  | 136   | 7                                              |

(The research did not measure colour sections of Sunday newspapers).

The questionnaire asked the standard National Readership Survey reading and frequency questions for daily and Sunday newspapers, and in addition included questions on:

– how the Sunday newspapers that they read were obtained (home delivery/bought personally at newsagent/bought by another household member at the newsagent/bought by somebody else).

– where did respondents read their Sunday newspapers (at home/at friends or relations/while travelling/at work/elsewhere).

– on what days are each of the three quality Sunday newspapers read (Sunday/Monday/Tuesday/Wednesday).

– approximately how long in total do readers of each of the three newspapers spend reading them (5 minutes or less/15 minutes/0.5 hour/0.75 hours/1 hour/1.5 hours/2 hours/2.5 hours or more).

Having collected this information the interviewer then took the respondent through the issue seen, or the first one read or looked at if more than one Sunday had been read. The respondent was shown the paper in section and page order treating the front and back pages of each section as separate spreads. The respondent was asked if he or she had read something on the spread, glanced through the spread, or not read or looked at the spread before.

If, at the start of a new section, the respondent volunteered the information that he or she had not seen anything in the particular section, the interviewer then asked about the front and back pages only. In other words, respondents could not dismiss any section without the further prompt of the front and back pages.

The interviewer then went on to ask about readership of specific editorial subject matter, and showed this list of editorial subjects that appear in Sunday newspapers:

|                            |                  |
|----------------------------|------------------|
| UK news                    | Foreign news     |
| Sport                      | Gardening        |
| Motoring                   | Fashion          |
| Food & drink               | Books            |
| Arts                       | Personal finance |
| Business and the city      | Travel           |
| TV & radio programmes      | Property         |
| Appointments/job vacancies |                  |

Each reader of *The Sunday Telegraph*, *The Sunday Times* and *The Observer*, was taken through this list, and asked how thoroughly they had read each subject in the previous Sunday's issue of the newspaper that they had read; had they:

- read thoroughly
- read some items
- glanced through it
- did not look at it.

Additionally for each subject readers were asked if they were:

- very interested
- quite interested
- not interested.

In an attempt to gauge readers' attitudes to single section and multi-section Sunday newspapers, they were asked if they agreed/disagreed with a range of attitudinal statements.

'I found that a single section Sunday newspaper makes my reading very convenient'.

'I find a single section Sunday newspaper inconvenient because I want to share my reading with another person'.

'I find that a multi-section newspaper is a very good way of organising one's reading'.

'I find that a multi-section Sunday newspaper can be too cumbersome for my liking'.

'It doesn't make any difference to me whether it is a single or multi-section Sunday newspaper.'

The research also includes a range of demographic questions on age, sex, occupation, car ownership, holidays, investments, household composition, and income.

## THE RESEARCH RESULTS

Research Services Ltd achieved interviews with 787 people, and the research generated 217 *Sunday Telegraph* readers, 211 *Observer* readers and 439 for *The Sunday Times*, with 80 people questioned about two papers.

The research provided us with some useful information about source of copy, reading days and time spent reading.

For example, as the table below shows only a small percentage spend 15 minutes or less reading their Sunday paper, with most spending between 30 minutes and 1 1/2 hours.

|                    | The<br>Sunday<br>Telegraph | The<br>Observer | The<br>Sunday<br>Times |
|--------------------|----------------------------|-----------------|------------------------|
| Time spent reading | %                          | %               | %                      |
| 5 mins or less     | 2                          | 5               | 4                      |
| 15 mins            | 7                          | 7               | 7                      |
| 30 mins            | 22                         | 18              | 15                     |
| 45 mins            | 16                         | 10              | 10                     |
| 1 hour             | 18                         | 18              | 21                     |
| 1.5 hours          | 14                         | 16              | 15                     |
| 2 hours            | 11                         | 9               | 11                     |
| 2.5 hours          | 7                          | 13              | 12                     |

On average, readers do spend slightly longer reading their three section *Observer* and their seven section *Sunday Times*, than the one section *Sunday Telegraph*, but, relative to the total issue size, the page exposure for *The Sunday*

*Telegraph* is likely to be higher than for *The Sunday Times* or *The Observer*.

|                     | The Sunday Telegraph | The Observer | The Sunday Times |
|---------------------|----------------------|--------------|------------------|
|                     | minutes              | minutes      | minutes          |
| Mean reading time   | 64                   | 70           | 71               |
| Pagination April 10 | 48                   | 88           | 136              |
| Pagination April 17 | 48                   | 76           | 136              |

Obviously, readers are selective in their reading, and in any paper will skip topics, or pages, which means that the calculation of average reading time per page could be a misleading one.

In terms of what is read in the quality Sunday papers, and looking first of all at *The Sunday Telegraph*, the table below demonstrates the extent to which readership holds up throughout the single section 48 page book. From a News 'high' of 94-98%, interest is maintained at a high level through Features, City, Travel, Property and so on.

#### The Sunday Telegraph

|                         | Read at least something % |
|-------------------------|---------------------------|
| Front page              | 98                        |
| News                    | 94                        |
| General features        | 93                        |
| Arts/books              | 82                        |
| 'Women'                 | 74                        |
| Editorial/leaders       | 82                        |
| City                    | 74                        |
| Travel                  | 71                        |
| Property                | 72                        |
| Motoring                | 62                        |
| Sport                   | 69                        |
| Back page (sport/radio) | 82                        |

Now going through each section of *The Observer* in section order:

In the first section, readership starts at 91% on the front page, falling to 51% for sport on the back page; while the readership of the World News section falls from 78% on the front page, to 56% on the back page. The front page of the Review section attracts 76% of *The Observer's* readers, and while some of the middle pages have lower scores, the back page with its TV and Radio programme listings is a popular one. The Business section is read by less than half the readers; but those that do read it tend to read something on most pages. *The Observer's* three special sections that appeared during our fieldwork period were of less general appeal, with the one on Investment in New Technology, for example attracting only 16% of those who read the April 10th issue.

#### The Observer

|                         | Read at least something % |
|-------------------------|---------------------------|
| News & sport section    |                           |
| Front page              | 91                        |
| News                    | 84                        |
| Features/editorial      | 81                        |
| Sport                   | 58                        |
| Back page/sport         | 51                        |
| Front/back page only    | 6                         |
| Anything in section     | 92                        |
| World news section      |                           |
| Front page              | 78                        |
| World news              | 69                        |
| Special report/feature  | 57                        |
| Back page (information) | 56                        |
| Front/back page only    | 12                        |
| Anything in section     | 82                        |
| Review section          |                           |
| Front page              | 76                        |
| Letters/weekend         | 73                        |
| Arts/books              | 69                        |
| Travel                  | 51                        |

**The Observer (Cont.)**

|                                    | Read at least something<br>% |
|------------------------------------|------------------------------|
| Review section (Cont.)             |                              |
| Homes & gardens/property/sec. file | 53                           |
| Back page (tv and radio)           | 77                           |
| Front/back page only               | 7                            |
| Anything in section                | 83                           |
| Business section                   |                              |
| Front page                         | 44                           |
| Business                           | 42                           |
| Personal finance                   | 42                           |
| Motoring                           | 36                           |
| Back page (business)               | 39                           |
| Front/back page only               | 3                            |
| Anything in section                | 49                           |

**Special sections:**

|                                         | Read at least something<br>% |
|-----------------------------------------|------------------------------|
| Business of sport (April 10)            |                              |
| Front page                              | 35                           |
| Back page                               | 19                           |
| Front/back page only                    | 10                           |
| Anything in section                     | 36                           |
| Investment in new technology (April 10) |                              |
| Front page                              | 15                           |
| Back page                               | 10                           |
| Front/back page only                    | 1                            |
| Anything in section                     | 16                           |
| Financial Services Act (April 17)       |                              |
| Front page                              | 21                           |
| Back page                               | 14                           |
| Front/back page only                    | 3                            |
| Anything in section                     | 22                           |

As far as *The Sunday Times* was concerned readership scores for news in the News and Sport section was high, ranging from 92% to 71%, with some drop-off for sport. Readership of the second section, Week in Review, falls from 69% on the front page to 47% on the back.

The Arts and Leisure section maintains a relatively high level of readership throughout – the back page no doubt being helped by the fact that it includes the TV and Radio programme listings; just under half of the readers of *The Sunday Times* looked at the front page of the Business section. 29% of readers read at least something in the Appointments Section of *The Sunday Times*, with interest rising again for the Travel section. The tabloid Books section of *The Sunday Times* performs well, with at least something in the section being read by just under half of the readers with practically no fall in readership from the front page to the inside editorial pages. (The back page, incidentally, was an advertisement in both weeks).

**The Sunday Times**

|                                 | Read at least something<br>% |
|---------------------------------|------------------------------|
| Section A: News and Sport       |                              |
| Front page                      | 92                           |
| News                            | 86                           |
| Spotlight/profile/news in focus | 78                           |
| World news                      | 71                           |
| Sport                           | 61                           |
| Back page (sport)               | 58                           |
| Front/back page only            | 6                            |
| Any section 'A'                 | 93                           |
| Section B: Week in Review       |                              |
| Front page                      | 69                           |
| Opinion, the world              | 66                           |
| Letters/education forum         | 56                           |
| Motoring/property               | 42                           |
| Back page                       | 47                           |
| Front/back page only            | 7                            |
| Any section 'B'                 | 74                           |
| Section C: Arts & Leisure       |                              |
| Front page                      | 71                           |
| 'Look'                          | 67                           |
| Screen & print                  | 55                           |
| Arts                            | 57                           |
| Property/motoring               | 55                           |
| Back page                       | 64                           |
| Front/back page only            | 10                           |
| Any Section 'C'                 | 80                           |

**The Sunday Times (Cont.)**

|                                    | Read at least something<br>% |
|------------------------------------|------------------------------|
| Section D: Business                |                              |
| Front page                         | 48                           |
| Business/city                      | 44                           |
| Personal finance                   | 37                           |
| Back page (innovation)             | 37                           |
| Front/back page only               | 8                            |
| Any section 'D'                    | 52                           |
| Section E: Appointments            |                              |
| Front page                         | 28                           |
| Inside pages                       | 18                           |
| Back page                          | 18                           |
| Front/back page only               | 11                           |
| Any section 'E'                    | 29                           |
| Section F: Travel                  |                              |
| Front page                         | 59                           |
| Inside pages                       | 56                           |
| Back page                          | 47                           |
| Front/back page only               | 8                            |
| Any section 'F'                    | 64                           |
| Section G: Books (Tabloid Section) |                              |
| Front page                         | 43                           |
| Inside pages                       | 41                           |
| Back page                          | 29                           |
| Front/back page only               | 5                            |
| Any section 'G'                    | 46                           |

So, how should these results be used?

Well, one use is in more selective media planning. If an advertiser is considering placing an advertisement on one of the Travel pages in the quality Sunday newspaper market, should he weight the National Readership Survey average issue readership figure to reflect fall-off by section and/or subject? Our research showed, for example that only 56% of *Sunday Times* readers read the inside pages of the Travel section: you can see the extent to which these weights would alter the relative positions of the three quality Sundays.

|                         | NRS<br>Average<br>Issue<br>Readership<br>% | Average<br>Readership of<br>Travel Pages<br>% | Adjusted/<br>Weighted<br>NRS<br>% |
|-------------------------|--------------------------------------------|-----------------------------------------------|-----------------------------------|
| The Sunday<br>Telegraph | 5.0                                        | 71                                            | 3.6                               |
| The Observer            | 5.0                                        | 51                                            | 2.6                               |
| The Sunday<br>Times     | 8.4                                        | 56                                            | 4.7                               |

## SUMMARY AND CONCLUSIONS

These research findings do support our initial hypothesis that the higher the number of separate sections that a newspaper has, together with the pagination levels, the greater is the extent to which average issue readership is an over-estimate of potential spread traffic or advertisement exposure. But, obviously, at the same time, what we should not ignore is the fact that media planning will take into account the fact that editorial features are targeted at specific sub-groups, as is advertising.

One of the most interesting questions that this research throws up is the role of the National Readership Survey in responding to, and measuring, significant product changes, and more specifically, the value of average issue readership as the basis for making comparative assessments of the three quality Sunday newspapers. JICNARS has set up a committee to discuss the issue of multi-section newspapers and continues to debate the research problems, but as at February 1989, no decision had been reached. By contrast, *The Sunday Telegraph* identified the need for information, was well aware of agency pressure for such information; briefed Research Services Ltd at the end of February 1988, fieldwork was in April, and the

results were presented in June. As a media owner, perhaps we are better placed to respond quickly to market changes; by their very nature committees cannot react as fast.

*The Sunday Telegraph's* research was a first look at the rapidly changing quality Sunday-market. Is it the task of media owners, or

industry bodies such as JICNARS to develop our understanding of the quality Sunday newspaper market, or of other areas of change, such as the Saturday newspaper market? I suggest that media owners, and advertising agencies, could quicken the industry pace by independent, non-industry ventures such as ours.