

WHAT DAY IS IT TODAY?

Julie Ferguson - Consultant

Synopsis

British national newspapers are increasingly targeting different reader interest groups on different days of the week. What effect is this having in their average issue readership profile, and does this selective targeting make average issue readership across the week invalid?

This paper seeks to explore to what degree nationals vary their reader interest by day of week, and the effect this has on readership.

It also looks at the changes which have recently taken place in the editorial content of Saturday newspapers, and asks if it is reasonable to average the readership of an issue with a significantly higher circulation and probably readership with that of five other lower circulation issues.

What day is it today?

Some countries are more newspaper countries than others. At the very extreme of newsprint consumption lies the UK. More newspapers are bought by Brits than anywhere else in the world. Indeed very few countries have nationally distributed newspapers. It is perhaps because of the uniqueness of this huge and potentially vulnerable market for newspapers which drives publishers to continually modify, re-design and re-think the editorial policy and marketing strategy of these papers.

There are newspapers which publish seven days a week. Others publish on six days, and yet another who publishes only Monday to Friday. Some newspapers produce a 'Weekend' paper, like the Financial Times and the International Herald Tribune, and to a lesser extent The Daily Telegraph, The Times and The Guardian. The internationally distributed newspapers, often available on airlines, have cover dates of Saturday and Sunday and will be available on both days of the weekend.

Then there is the phenomenon of one day publishing - the Sunday newspaper. Publishing Sunday newspapers is what the British do best. And what they do second best, is read them. Or at least this is what has happened, but things are changing. Saturday newspapers are breaking away from the week-day image of a newspaper and becoming more like Sunday's.

As the British culture changes, leisure time increases, shopping hours extend into Sundays and family units get smaller, so the distinction between Saturday and Sunday blurs into 'the weekend'.

This makes the media researcher's job that much more difficult. How do we help the respondent differentiate between days of the weekend, or between parts of a multi-section newspaper which could be published almost on any day of the week (and in some cases are repeats of pages published earlier in the week)? For the researcher, the weekend has a negative confusion.

But for the consumer, the weekend is positively confusable. They can shop for groceries on either day, buy household equipment or a car. They can go to the cinema and often the theatre. They could see a concert or a major sporting event. Even test match cricket is now being played at Lords on a Sunday. So you see that Saturday is much like a Sunday, and vice versa. No real distinction needs to be drawn. Only to remember to set the alarm for the next day if you're lucky enough to have a job to get up for.

UK National newspapers, primarily the quality broadsheet newspapers, have for some time directed their editorial content to appeal to different groups of readers on different days of the week. Sometimes this direction has been advertising orientated, to even out advertisement revenue over the week, but sometimes it has been editorially led because of availability of news stories.

Increasingly, it has become led by marketing men and women who recognised that the soft underbelly of regular daily circulation and readership was being chipped away by the availability of alternative news

delivery. They needed a hook on which to hang a regular purchase, even if that regular purchase was simply once a week. If 16 million copies of Sunday newspapers can be sold once a week, then why not 16 million copies on a Monday or Wednesday or Saturday?

Last year the average daily circulation of national newspapers in Britain was 13.6 million. An additional 2.4 million copies sold a day adds up to a lot of circulation revenue (around £1 million a day incidentally), let alone any additional advertisement revenue that might be generated.

A Brief History of Circulation

You might wonder, those of you from countries with major regional or conurbation targeted newspapers why anyone should get steamed up over national newspapers. At the risk of telling you something you already know, now is as good a time as any to show you what has been happening to nationals' circulation figures over the past few years. I have chosen the 70's not because I remember them with any degree of fondness or clarity, but because the UK had just experienced a period of enormous social change. The 70's welcomed a new generation, with high expectations. A generation better educated than their parents, better travelled than their parents, and earning more money than their parents. The Clinton's of this world.

1972 saw circulations of daily and Sunday newspapers past their peak. But still 111,000,000 national newspapers were being sold every week - 2.5 newspapers a week for everyone aged 15 and over in the country. And Sundays were outselling the dailies by virtually 50%.

Circulation

	Daily National (000's)	Sunday Nationals (000's)
1972	14,871	22,090
1982	15,579	18,153
1992	13,566	15,933
% change '92 on '72	-9%	-28%
% change '92 on '82	-13%	-12%

Whilst Sunday newspapers have been declining for a generation or more; 22 million copies were sold on an average Sunday in 1972 down to just under 16 million in 1992, daily newspapers have only just, well in the last 10 years, begun to shed sales, and in the past have seen a 13% fall.

This does not necessarily mean that the British population have stopped reading, they have simply stopped reading as many newspapers. They may well be reading more newsprint now than they read 10 or 20 years ago, as the volume of pages produced by the nationals grows ever higher. It's a blessing, in a way, that subscription sales of U.K. national newspapers are low. The postage would cost more than the cover price.

Firstly, Sunday papers

There is considerable speculation as to why the massive decline in Sunday newspaper circulation since the sixties and seventies. The majority of the fall in sales is undoubtedly due to alternative sources of news and current affairs - both radio and television. Multi purchase of Sunday newspapers was commonplace during the period, and now (from the mid eighties) the need to buy more than one paper has diminished.

Sunday Nationals

	<u>Circulation</u>	<u>Readership</u>
	(000's)	% (000's) reach
1972	22,090	35,497 (87%)
1982	18,153	32,507 (75%)
1992	15,933	31,758 (70%)
% change '92 on '72	-28%	-11% -20%
% change '92 on '82	-12%	- 2% - 7%

Whilst circulation fell by 28% over 20 years, readership - cumulative net readership that is - did not fall as much, down 20% over the same period. Whether we look at pure numbers, ignoring the population growth, where the decline is only 11% over 20 years, or whether we look at penetration, net readership fares better than circulation for Sunday newspapers.

Next, Daily papers

Both daily and Sunday papers net readership penetration and total audience fell by the same amount over 20 years, but the circulation and readership loss of daily newspapers has accelerated in the past 10 years compared with Sundays.

Whilst circulation of daily newspapers fell by 13% in the past 10 years, readership penetration fell by 22%.

Daily Nationals

	<u>Circulation</u>	<u>Readership</u>
	(000's)	% (000's) reach
1972	14,871	30,830 (75%)
1982	15,579	31,623 (73%)
1992	13,566	27,328 (60%)
% change '92 on '72	- 9%	11% -20%
% change '92 on '82	-13%	-14% -22%

Against this background, newspaper publishers emerged from their union enforced cocoons to fight for their share of circulation, readers and advertising revenue.

If the British population could not be relied upon to buy and/or read at least one newspaper every day of the week, then publishers would entice the reader with tailored issues. Thus a core of readership developed around which a floating group of readers dipped in and out.

see appendix A

An example - The Guardian

Perhaps the best example to illustrate my point is The Guardian. The Guardian, more than any other publisher, produces a product which has a sound interest for its core readership and a powerfully presented section designed to reach out to the regular reader. This policy of selective targeting has paid off for The Guardian, as its circulation and readership pattern since 1972 is considerably more healthy than the figures shown earlier for all dailies.

The Guardian

	<u>Circulation</u>	<u>Readership</u>
	(000's)	% (000's) reach
1972	339	1,186 (2.9%)
1982	408	1,385 (3.2%)
1992	415	1,285 (2.8%)
% change '92 on '72	+22%	+8% -3%
% change '92 on '82	+ 2%	-7% -12%

Whilst circulation of the national daily newspaper market declined over by 9% in the last 20 years, The Guardian has seen a circulation growth of 22%. Penetration of The Guardian has fallen by 3% in 20 years, compared with a net penetration loss for the national daily market of 20%.

The Guardian targets clearly defined professional groups on different days of the week. They did this initially with recruitment advertising until they had developed a market sufficiently strong enough to attract consumer and business-to-business advertising. They supported their target groups with top quality editorial, not superficially written articles to pander to the target group in the style of an advertorial, but written by top journalists in their field.

We should be able to see from examination of occupation codes of respondents on the National Readership Survey, by day of week interviewed if the proposition I have put forward is true. Does readership vary by day of week? The National Readership Survey sample is not stratified by day of week, but for my purposes here, despite its shortcomings, it is interesting enough to explore.

I have looked at interviews by day of week; the data was not re-weighted, and found that apart from Sundays, interviews are fairly evenly spread across the rest of the week. In order to get a sufficient number of respondents by day of week I used two years data, January 1991 to December 1992. The unweighted count was 62,000. Now of course the availability of different people for interview will vary by day of week, but I was hoping that we might get some small indication that there would emerge a reading pattern by groups of different people by day of week. So I crossed my fingers, and asked for the analyses. I decided not to hold back if it doesn't exactly support my theory.

The Guardian is writing to the media and marketing community - they do this every Monday and have been doing so for over ten years, so it must be Monday. Does The Guardian attract this audience? Given that only 1.7% of the population fall into the media, creative, broadcast, advertising, marketing, sales community and 6.8% of The Guardian's readers are in this group, I'd say they have a pretty high probability. But do they read the editorial and advertising provided in Monday's Guardian?

see appendix B

Yes, and no. This group is pretty hard to find during the week which is shown by the minus probability score, and we can see that they are more likely to read on Monday and Tuesday than the average Guardian reader. Perhaps they are getting pass-on copies a day late. Or perhaps they don't know what day it is.

see appendix C

Teaching professionals seem to know what day it is all right. The Guardian addresses them fairly powerfully on Tuesday each week. So we should expect them to crop up with a high index on Wednesday; and they do. They are also fairly heavy readers on a weekend. Would this have anything to do with the Weekend Guardian?

Media, sales and marketing people haunted me just a little, so I took a look at another publication. Not for the creative end of the business but for the sharp end sales and marketing. The same occupation groups were used for this as for the Guardian example shown before, but with the Daily Telegraph, a different pattern emerges.

see appendix D

Firstly, our media group are more likely to be found on Monday having read on Saturday. This more than supports the Telegraph's claim that circulation rises considerably on a Saturday, and over the period in question was probably in the region of 15% higher than their Monday - Friday sale.

The group of people we identified earlier as media and marketing are also identified reading on a Thursday. This is when the Telegraph publishes its pages of job ads - mainly in the sales and marketing area. The Telegraph also claim that their sales increase on a Thursday because of the high number of vacancies they carry.

There is no doubt that newspaper publishers set out to attract different groups of people on different days of the week. It is not just common to the quality broadsheet newspapers either, as all the popular tabloid newspapers attempt, to a greater or lesser degree, to provide something for everyone during the week. If you are the target, you'll generally know which day it is.

Weekend Newspaper Readers

But what of weekend newspapers? We have seen that media/marketing/sales people read the Telegraph at the weekend. We have seen that teaching professionals read at the weekend. Who else? How can we measure the readership of a Saturday issue of a newspaper which most people consider to be their daily paper? Or are readers choosing different newspapers to read on a Saturday in much the same way as they choose a Sunday paper?

Since the relaunch of the Telegraph Weekend Magazine in September 1988 and the launch of the Independent Magazine the following month, Saturday newspapers in the UK began to change significantly. The change in Saturday papers has been recognised and embraced by the consumer and the advertiser, but not yet, in a cohesive way, by those who guide readership surveys in the UK.

We have four and a half years of emerging market. The time is now right to measure it.

About the only thing which is the same about the Telegraph on a Saturday and on Monday to Friday is the title. The rest is a very different newspaper. They charge more for it, it contains a colour magazine, it carries a very different style of editorial and it has more sections. It competes with Sunday newspapers not other Saturday newspapers. It sells more copies on a Saturday than it sells Monday to Friday.

The latest circulation figures which have been given to me by the Daily Telegraph are:

Daily Telegraph

	September 1992- February 1993
Monday-Friday daily average	1,003,000
Saturday	1,215,000
Difference:	+21.1%

Source: Telegraph Circulation Dept/KPMG Peat Marwick

Not only is its circulation higher on Saturday, we have evidence that supports a higher readership theory. The Telegraph Weekend Supplement reaches 3.2 million adults, whilst the Monday to Saturday newspaper has an average issue readership of 2.5 million. It is just possible that the magazine is being read by more people than the parent paper, but history tells us quality newspaper magazine supplements achieve about the same level of readership - with two recent Saturday exceptions.

The following chart shows that quality newspaper supplements readership varies only marginally from the parent paper. If the Daily Telegraph is being read by around three million on a Saturday, about the level of readers which the supplement achieves, then the Daily Telegraph's salesforce is selling the Saturday issues of the newspaper without the extra half a million readers it could rightfully claim. Every up has a down however, and it would be fair to say that the Daily Telegraph would deliver a slightly lower a.i.r. with their Monday to Friday newspapers. This would require a downward adjustment of about 144,000 a day on their current estimate (except perhaps on Thursdays)!

Comparison of Parent and Supplement

	Readership		
	Newspaper 000's	Supplement 000's	% dif.
The Sunday Times	3,516	3,483	-0.9
The Observer	1,665	1,579	-5.2
Mail on Sunday	5,828	5,767	-1.0
Daily Telegraph	2,534	3,113*	+22.8
The Independent	1,064	1,505*	+41.4

* published on Saturday

The other newspaper which produces a Saturday colour supplement is The Independent. The magazine's readership currently stands at 1.5 million, whilst its parent has an a.i.r. of just over 1 million. If The Independent's colour supplement delivers a similar pattern of readership to that delivered by other colour supplements, then the average issue readership of the Monday to Friday Independent newspaper should be 9% lower than the 1,064,000 currently estimated, and the Saturday paper should be showing one third more readers.

More and more Saturday newspapers are changing into news summary and leisure based publications. All Saturday national newspapers in the U.K. now provide a Television Guide of some sort for the week ahead. Many newspapers now have a higher cover price on Saturday than Monday to Friday. They carry different advertising on a Saturday. All the quality Saturday papers are multi-sectioned, and the popular papers are 10% to 20% bigger in volume than their weekday counterparts.

In short, there is no comparison between a Monday to Friday newspaper and a Saturday issue.

Measuring Readership

A few years ago, the Daily Telegraph organised a group of quality daily newspapers to sponsor a study of Saturday newspaper readership. The survey was conducted by RSL amongst ABC1's only, mainly because the quality papers were then the only Saturday newspapers to produce a product different from their Monday to Friday product.

The problem with independent surveys is that they cannot be easily incorporated into the common currency of media planning and buying, and need to be promoted heavily to keep them in front of users.

The experience gained with that survey was invaluable. We learned that even the brightest people don't listen to the question. Perhaps the question in that survey could have been better phrased. The problem occurred with those who read the Saturday issue for the first time on Monday.

Respondents were given two opportunities to claim readership. Firstly, they were asked if they had read the Saturday issue, and later they were shown a stripped copy of all Saturday issues. The claims at the prompted stage were higher for all newspapers. However, the claims for the Financial Times and the Daily Telegraph were much higher. This led us to believe that respondents simply didn't listen to the question. People often think about what they did on Saturday rather than consider if they read Saturday's issue of a newspaper. The study showed that 25% of the Financial Times readers read their copy at work. They would not be likely to be at work on Saturday, hence the lower claim for Saturday reading. This pattern of high 'at work' readership was not found for the Daily Telegraph, where 5% claimed to have read at work. With this sample a high proportion claimed reading for the first time on Sunday.

2,251 interviews were achieved amongst ABC1's.

Prompted and Unprompted Readership of Saturday Issues

	<u>Unprompted AIR</u> 000's	<u>Prompted AIR</u> 000's	<u>Dif.</u> %
The Guardian	1,293	1,440	+11.4
Daily Telegraph	2,139	2,465	+15.2
The Independent	1,232	1,320	+ 7.1
The Times	1,055	1,127	+ 6.8
Financial Times	498	574	+15.3

Source: Quality Daily Newspaper Group 1989/90

Since that survey, interest in Saturday newspaper reading has increased from all sides of the industry, with the quality national daily newspapers most active.

In 1990, the UK Businessman Survey conducted also by RSL on behalf of the Business Media Research Committee, included a question on readership of Saturday newspapers for the first time. The question was asked of all who had read in the past year, and it was asked after recency and frequency, and after source of copy (for newspapers) had been obtained for all titles. The question asked was "How often do you read or look at Saturday issues of ...?". "And when did you last read or look at a Saturday issue of ...?"

Any readership claim of any Saturday issue of a title within the last seven days qualified as average issue readership of the Saturday paper.

The survey had previously calculated Monday to Friday readership estimates based on the day of week on which the respondent was interviewed. Now the survey could provide a comparable Saturday readership estimate.

The results of the Saturday readership question from the 1993 BMRC survey are not available as yet, but because the 1993 survey used the CAPI method of data collection, the positioning of the question was changed from the 1990 survey position. The positioning was the same as the National Readership Survey split sample conducted between October and December last year. The Managing Director of NRS Limited has kindly given me permission to use this extract from the results.

The question was asked immediately after the standard frequency question, and on the NRS test, the exact wording was "Thinking now of Saturday issues of ..., that is the one published on a Saturday, when did you last read or look at any Saturday issue of ...(apart from today?)"

Yesterday
Past 7 days
Past 4 weeks
Past 3 months
Longer ago

"And which best describes how often you read or look at Saturday issues of ...?"

Almost always
Quite often
Only occasionally
Not in the past year

The addition of the Saturday issue readership questions seemed not to have had an adverse effect on standard a.i.r. levels of dailies. Overall standard air levels of the two samples were virtually the same. Any differences were not significant.

Within the test sample, the Saturday issues a.i.r. levels were found to be 7% **higher** than the standard a.i.r. levels for quality dailies, 7% **lower** for mid-market dailies, and 3% **higher** for popular dailies.

NRS October-December 1992

	<u>Total</u>	<u>Sat. Ques.</u>		<u>No Sat Ques.</u>
	<u>Any</u> <u>AIR</u>	<u>Any</u> <u>AIR</u>	<u>Sat Issue</u> <u>AIR</u>	<u>Any</u> <u>AIR</u>
	%	%	%	%
Qual. Dailies	15.8	15.5	16.6	15.2
Mid-Market Dailies	22.7	21.4	20.0	23.0
Popular Dailies	49.9	48.7	50.2	50.8
All Dailies	88.4	85.6	88.4	89.0
(Unweighted base)	(7,945)	(3,780)		(3,999)

It is hoped that a further test for the effectiveness of Saturday issue reading will be undertaken before too long, as the need for the measure increases with almost every week which passes.

Further editorial developments have recently taken place with the Daily Telegraph and The Times, and if I was an advertiser, I would want to know what type of people have the opportunity of seeing my advertisement on Saturday. I would also want to know how many of these people are not reading a Sunday newspaper, but reading their Saturday paper through le weekend, European style.

Conclusion

I believe we can see from this paper that evidence exists to indicate different people read different newspapers on different days of the week.

The question now becomes how important is it to publishers of national newspapers and buyers of space and their clients to measure this difference.

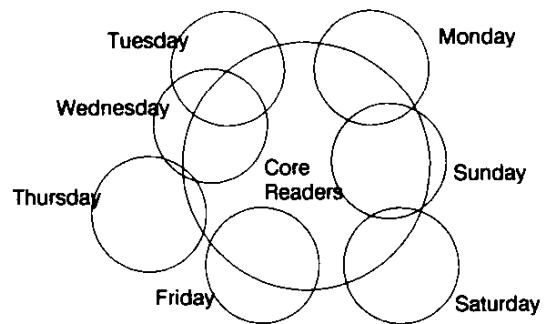
What is certain however, is that whilst it may not as yet be practical to measure readership on different days of the Monday to Friday week, it must be possible to effectively measure Saturday issue reading and this I believe should be a priority in British readership research.

As for the lessons which we have learned in the UK which delegates from other countries might be able to apply to their own research priorities, the primary one must be to establish that differences exist in sufficient number between a publication's issues on different days of the week.

This is to ensure that the respondent can recognise that he actually read or looked at the issues in question. Perhaps most important of all is that a growing market demand exists for such a measurement.

Appendix A

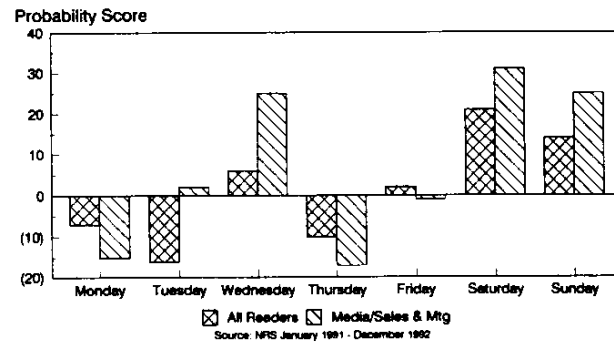
The Pattern of Reading



Appendix B

The Guardian

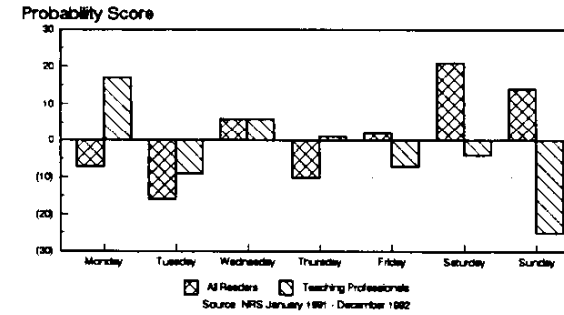
When Media, Sales & Marketing People are Interviewed



Appendix C

The Guardian

When Teaching Professionals are Interviewed



Appendix D

The Daily Telegraph

When Media, Sales & Marketing People are Interviewed

