

MEASURING THE READERSHIP OF SUPPLEMENTS

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Synopsis

Over the last two or three years, newspaper publishers have increasingly been providing special supplements along with the main newspaper. These pertain to business and financial areas, sports and leisure, films and general interest. One newspaper, the Economic Times provides a special supplement called "Brand Equity" (on advertising, marketing and market research) once a week. Interestingly, on that day the price of the issue is only Rs.2/-, as compared to Rs.5.50 for every other day. Circulation of the Economic Times on that day is as much as 30% higher than on any other day.

Looking at the content of these supplements, it is conceivable that supplements have an existence separate from the main newspaper, have a longer life and could accumulate much higher pass along readership than the main newspaper.

The National Readership Surveys in India have so far not measured the readership of supplements. It is, therefore, necessary to devise appropriate measurement techniques to estimate separately the readership of the main newspaper and the supplement.

The study is limited to respondents in the upper and middle socio-economic groups in Bombay who read any English publication.

We have tried out two approaches of measurement. The first approach is a modification of the regular masthead method, where we have used black-and-white reproductions of the mastheads of the supplements as a prompt to elicit the frequency of reading and ascertain when was the last time that the respondent read or looked at a copy of the supplement.

The second method of measurement uses the Through-the-book approach by showing the actual supplement itself to ascertain whether the respondent has read or looked at the issue/specific articles before the interview. Since the publications being researched are newspapers, the aspect of ageing of the issue is one which does not pose any serious problems for this experimental study.

The system that we propose to use for validation is another database where we have incidence of FRY reading for two leading English dailies and their supplements. This will act as a good validity check for both the masthead as well as the TTB method of measurement.

One of the secondary benefits of such a study would be to obtain a qualitative understanding of the reader of the main newspaper as well as the supplement. It would help determine whether they should be aimed at completely different targets, whether supplements fulfill different reader needs, or whether different advertising rates are justified.

We believe that this study will provide researchers as well as editorial and space-marketing executives with an insight into the readership of newspaper supplements.

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MEASURING THE READERSHIP OF SUPPLEMENTS

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I. INTRODUCTION

Over the last few years, newspaper publications have increasingly been providing special supplements along with the main newspaper. The supplements may be for weekend reading, or specialist interest sections like business, finance, leisure or sports related. In some cases, the newspapers have a higher circulation level on the day the supplement is issued.

Looking at the content of these supplements, it is conceivable that supplements have an existence separate from the main newspaper, have a longer life, and could accumulate a higher pass along readership than the main newspaper.

The National Readership Surveys in India have so far not measured the readership of supplements. We wished to know whether a simple method could be devised to measure the readership of supplements, which could then be incorporated within the survey. The Indian NRS uses the recent reading model with black-and-white masthead reproductions as prompts. It was suggested that the 'mastheads' of supplements could be inserted along with those of regular publications, and readership of supplements then determined in much the same manner.

This paper reports on a special study carried out in Bombay to see whether such a solution is feasible.

In the main survey conducted, readership of supplements (along with the main paper and a few other publications) was determined using the masthead prompts. We then showed specific issues of supplements, which was used to generate a separate estimate of readership. Through a separate sample we have also derived an estimate of readership using the First Time Read Yesterday (FRY) approach for a shorter list of supplements.

II. STUDY DESIGN

1. The Sample :

The main survey was conducted in Bombay among 293 adults (aged 15+ years). We restricted our survey to the upper and middle social classes, i.e. ABC households. Interviews were conducted in areas that were predominantly upper and middle class. Households were contacted using a random route method, with a fixed number of interviews in each area. The sample composition is given below :

Base : All interviewed	293
Socio Economic Class	100%
A	45
B	28
C	27
Age (Years)	
15 - 24	40
25 - 44	40
45+	20
Sex	
Male	66
Female	34
Occupation	
Officer/Executive	25
Clerk/Sales	18
Student	22
Others Skilled/Unskilled Worker/Trader etc	17
Non-working/Retired	18

2. The Interview :

The interview was conducted in two parts. Readership of selected publications was established using the Recent Reading Method in the first part of the interview. Black-and-White reproductions of the mastheads of the supplements were used as prompts to elicit the frequency of reading.

Respondents were exposed to a number of English and Indian language publications and supplements. The mastheads were classified and arranged in the following order with rotations within each group of publications :

1. Monthlies
2. Fortnightlies
3. Weeklies
4. Sunday Newspapers
5. Weekly/Weekend Supplements/Magazine sections
6. Dailies (Everyday)
7. Dailies (Monday to Saturday)

To sum up, the Supplement/Magazine sections of dailies were grouped together as a separate section following the Sunday Newspapers.

The second module of the interview consisted of giving respondents supplements of eight selected newspapers and asking them to point out articles/features that they found interesting. Of the eight newspapers checked out by the TTB method, five were English papers and three were Hindi and Marathi. For each issue/supplement, they were asked whether this was the first time they had seen the particular issue or whether they had read or looked at it before.

Those respondents who claimed to have read an issue 'before', were further questioned on when they last read or looked at that particular issue - viz on the date of issue or later.

3. About the Supplements :

A brief description of the supplements covered in this study is given below. (All Circulation figures are for Bombay).

1. Saturday Times

This is issued along with the Times of India (Circulation : 327,000), the leading English newspaper in Bombay. It covers a miscellany of subjects of general interest.

2. Times of India - Sunday Review

Also issued with the Sunday Times, this is somewhat larger than the Saturday Times (Circulation : 354,000). It covers the arts, general interest subjects and has comic strips. Both the Saturday and the Sunday issues of Times of India are priced a little higher.

3. Indian Express Sunday Magazine

This is similar in content to the Sunday Review, though the range of topics is a little wider and generally includes some reading for women. The Indian Express (Circulation : 133,000) is the second largest English daily in the city.

4. Brand Equity

Issued along with The Economic Times (Circulation : 52,000) on Wednesday. The Economic Times is the leading financial newspaper. The supplement covers stories on marketing, advertising and market research. On Wednesday, the Economic Times is priced lower than on other days - an 'invitation price'.

5. ET Esquire

This comes with The Economic Times on Saturday, and purports to be a 'leisure time' read for businessmen, dealing with personalities and lifestyles.

6. Ravivari Jansatta

The Sunday supplement of Jansatta (Circulation : 43,000), a Hindi newspaper.

7. Jansatta Sabrang

Also issued on Sunday, along with Jansatta, this section is formatted as a magazine.

8. Maharashtra Times Mehfil (M T Mehfil)

The Sunday supplement of the Maharashtra Times (Circulation : 190,000), Marathi newspaper.

9. Loksatta Lokrang

Issued on Sunday along with Loksatta (Circulation : 231,000), a Marathi language daily.

III. FINDINGS

1. Readership estimates from the Recent Reading Method

In the absence of any other information, the buyer of advertising space has to make the assumption that audience for the supplements is much the same as for the main paper. However, it can be argued that the supplement, which can be 'handled' separately and is generally more colourful and attractive, might have a slightly larger life and a somewhat larger audience. A contrary point of view could be that the less involved reader may skip the supplement altogether.

We have obtained estimates of Average Issue Readership (AIR) from the Recent Reading model, using 'Mastheads' of the supplements as prompts. We also have these estimates for the main paper. These results are summarised below :

Table 1
AIR estimates - Recent Reading Method
(with 'Mastheads' as prompts)

Name of supplement	Average issue readership(%)		Index
	Supplement	Main paper	Supplement/ Main paper
Jansatta Sabrang	7.5	6.5	115
TOI-Sunday Review	41.6	39.2	106
IE-Sunday Magazine	14.3	14.0	102
Ravivari Jansatta	6.5	6.5	100
Loksatta Lokrang	29.7	31.7	94
Saturday Times	38.2	41.6	92
M T Mehfil	13.0	17.7	73
Brand Equity	5.5	9.2	60
ET Esquire	3.8	9.2	41

We see that in many instances the readership of supplements seem to be on par with the main papers'. This despite the fact that the qualifying interval is generally different between the two. However, for other publications the readership seems to be lower for the supplement. This is especially marked for Brand Equity, ET Esquire (both supplements of The Economic Times), and Maharashtra Times' Mehfil.

Were we to go by these findings, the conclusion would be that in general the audiences are about the same or slightly lower for the supplement as compared with the main paper. The 'gross' readership of supplements in our sample is, in fact, about 10 percent lower than for the main publications.

2. What happens when we show the issues ?

Later in the interview, people were actually shown a suitably aged issue - of a supplement (No reference was made to the answers given earlier; the only criterion used to decide which supplements should be shown was the ability to read the language). We have followed the practice adopted by SMRB; with a first question on features or sections that interest the respondent, after which we determined whether the issue was being seen for the first time or had been seen before.

We found that the estimates of AIR emerging from this method were higher in every instance. In some cases, the increase is quite dramatic.

Table 2
AIR estimates for supplements -
Through-the-Book (TTB) Method





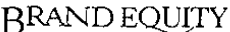

Name of supplement	Average issue readership(%)		Index
	Through-the-Book	Recent Reading (Mastheads)	TTB/Recent Reading
M T Mehfil	28.7	13.0	221
Brand Equity	10.2	5.5	185
IE-Sunday Magazine	25.3	14.3	177
Ravivari Jansatta	11.1	6.5	171
Loksatta Lokrang	47.2	29.7	159
Jansatta Sabrang	10.8	7.5	144
Saturday Times	45.2	38.2	118
ET Esquire	4.5	3.8	118
TOI-Sunday Review	46.5	41.6	112

If we assume that a specific issue is a superior prompt as compared to its 'masthead', then it would appear that the recent reading model with masthead prompts will underestimate audiences for supplements.

We could think of two possible reasons as to why this is happening :

1. The 'branding' and identity of supplements is not as well established as the main paper. Most supplements have been introduced only recently. The names given to the supplements, and the logos are disregarded by some readers - who are never, after all, required to identify and select supplements at a news-stand.
2. Casual reading events are easily forgotten; and are less likely to be captured by a masthead prompt alone. This effect is stronger than any tendency to overclaim, or to underestimate the time interval between the reading event and the interview.

It is possible for us to partially verify the first hypothesis. We have classified publications according to these categories :

Group	Examples... Supplement	Main paper
1. Supplements where the masthead contains a strong reminder of the main papers' identity (through the name, device, etc.)		
2. Supplements where a reminder exists but is weaker or confusable with entirely different publications.		
3. Supplements with little or no reminder of the main papers' identity.		

The value of the index is now examined for these three groups of publications.

Table 3
Index of TTB-Recent Reading -
according to similarity between 'supplement' and 'main paper' masthead.

Group 1 (Strong reminder)		Group 2 (Less strong reminder)		Group 3 (Little or no reminder)	
Saturday Times	118	IE-Sunday Magazine	177	M T Mehfil	221
TOI-Sunday Review	112	Loksatta Lokrang	159	Brand Equity	185
				Ravivari Jansatta	171
				Jansatta Sabrang	144
				ET Esquire	118
Average	115	Average	168	Average	168

There is clearly a relationship between weak branding and the possibility of 'losing' readers with a masthead prompt.

Adopting masthead prompts in the Indian NRS could then be a dangerous move, since the results could be misleading. Moreover, the results would be particularly unfair to some supplements, whose logos differ markedly from the mother publication.

Ironically, 'Brand Equity', a popular supplement on marketing and advertising issued along with 'The Economic Times' is one of the worst sufferers. And this is precisely because the publisher would like the supplement to have an identity of its own !

We thought that it would be interesting to examine the ratio of the AIR of a supplement generated using the TTB method with the estimated readership of the main paper. This is compared with the ratio calculated by us earlier (supplement v/s main paper using the Recent Reading Model), in the table below :

<u>Name of supplements</u>	<u>AIR of supplements compared with main paper (Index) :</u>	
	<u>Recent Reading (Masthead)</u>	<u>Through-the-Book</u>
Jansatta Sabrang	115	166
TOI - Sunday Review	106	119
IE - Sunday Magazine	102	181
Ravivari Jansatta	100	170
Loksatta Lokrang	94	149
Saturday Times	92	109
M T Mehfil	73	145
Brand Equity	60	110
ET Esquire	41	49

Note : The Index is calculated taking AIR of the main paper as 100 (using the Recent Reading-Masthead Method).

We see that the differences are small for The Times of India's Sunday Review and Saturday Times. Here the main paper is very widely read and familiar, and (as pointed out earlier), the mastheads of the supplements incorporate elements from the main paper. In the case of ET Esquire, the fact that the audience seems to be somewhat lower is confirmed by the TTB Method.

We were a little surprised to see these large increments in the audience for the supplement as compared with the main paper. Investigating this a little further, we have looked at the results from a question on the way in which the supplement is actually handled.

Table 5
How are supplements read ?

<u>% who said ..</u>	<u>Sunday Review</u>	<u>Saturday Times</u>	<u>IE-Sunday Magazine</u>	<u>Loksatta Lokrang</u>
Normally along with main paper	44	39	26	34
Normally separately	41	46	55	48

Base : Readers of supplement

This does imply that the supplement may be 'passed along' on its own. The tendency seems to be just a little more marked for Indian Express Sunday Magazine, for which we saw a very large difference between the supplement and the main paper.

We have some further corroboration from a question on the normal date of reading.

Table 6
When are supplements read ?

<u>% who said normally read ...</u>	<u>Sunday Review</u>	<u>Saturday Times</u>	<u>IE-Sunday Magazine</u>	<u>Loksatta Lokrang</u>
On date of issue	84	84	76	85
About 1 or 2 days later	37	36	44	45
Even later	11	14	10	14

Base : Readers of supplement

Nevertheless, the high increments seen in readership of supplements is an area that requires further investigation. It is just possible that a tendency to claim reading is heightened when an issue is shown (instead of masthead) - perhaps some respondents take this as evidence of our involvement, and feel obliged to say 'yes'.

3. Comparison with FRY estimates

We had added on questions on two publications to an omnibus tracking survey conducted at roughly the same time, among A, B and C households. The survey had a sample of 2286 adults spread over a four week period. The FRY measures of readership were obtained for Sunday Review and Indian Express Sunday Magazine. The three measures of AIR that we now have for the supplements are summarised below :

AIR (Indexed : Recent Reading = 100)	Sunday Review	IE-Sunday Magazine
Recent Reading (Masthead)	100	100
Through-the-Book	112	177
First time Read Yesterday	99	86

We do not have these results for a larger number of publications. However, FRY estimates do seem to converge with those generated by the Recent Reading Model. This reinforces the suspicion that prompting with issues could lead to some degree of overclaim.

IV. CONCLUSIONS

We are of the view that when the supplement carries a logo that contains a strong reminder of the main newspaper, the masthead method can be used to measure the readership of supplements. However, in such cases, the supplement is more likely to be seen and treated as part of the main newspaper, and is likely to have a similar level of readership.

The need for measurement of readership **separately** is greater when the supplement is attempting to evolve an identity of its own - such as 'Brand Equity' from The Economic Times. Such a supplement could conceivably evolve into a priced publication in its own right. However, the chance of confusion and possible underestimation of readers will also be greater, since the logo, in keeping with the overall strategy, is likely to be distinctive.

To sum up : At this stage, we would not recommend an across-the-board inclusion of masthead prompts of supplements in the Indian NRS. We would, however, recommend that a few different kinds of supplements should be incorporated in the set of prompts in the next NRS, purely on an experimental basis, so as to extend this investigation to a larger scale.

APPENDIX

LIST OF PUBLICATIONS USED FOR THE MASTHEAD METHOD

	Language
MONTHLIES	
Cine Blitz	English
Filmfare	English
FORTNIGHTLIES	
Femina	English
India Today	English
India Today	Hindi
WEEKLIES	
The Illustrated Weekly of India	English
Sunday	English
SUNDAY NEWSPAPERS	
The Economic Times on Sunday	English
Sunday Times	English
Sunday Mid-Day	English
Nav Bharat Times Ravivarya	Hindi
Ravivar Maharashtra Times	Marathi
Ravivar Mumbai Sakal	Marathi
Mumbai Samachar Weekly	Gujarati
WEEKLY/WEEKEND SUPPLEMENTS/MAGAZINE SECTIONS	
ET Brand Equity	English
ET Esquire	English
Indian Express Sunday Magazine	English
Saturday Times	English
The Sunday Times of India Review	English
Sunday Mid-Day Part 2	English
Ravivar Jansatta	Hindi
Jansatta Sabrang	Hindi
Ravivarta	Hindi
Loksatta Lokrang	Marathi
Maharashtra Times Mehfil	Marathi
Ravivar Purvani	Marathi
Gyanranjan	Marathi
DAILIES	
Indian Express	English
Jansatta	Hindi
Loksatta	Marathi
Navakal	Marathi
Samna	Marathi
DAILIES (MONDAY TO SATURDAY)	
The Economic Times	English
Mid-Day	English
The Times of India	English
Navbharat Times	Hindi
Maharashtra Times	Marathi
Sakal	Marathi
Mumbai Samachar	Gujarati

