SECTIONS ARE SEXIER

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Synopsis

This paper provides the follow-up to the paper on newspaper sections presented by Fred Bronner in Vancouver (Bronner, Van Niekerk, Brennecke, 1997). Commissioned by the Platform of Media Agencies, this 1999 study has investigated more and different newspapers, including regional titles.

Overall results regarding section readership are consistent over time, over titles and over issues of the same title. The results of several other studies concerning section readership, in the Netherlands as well as abroad, indicate that the findings are to a certain extent universally applicable to the behaviour of newspaper readers.

The implication of this is that it is unnecessary to measure section readership of all newspapers on a continuous basis. An adequate sample of readers and issues for each paper once or twice a year would be sufficient to obtain reliable figures on section readership.

An important consequence of this is that the use of face-to-face page-traffic interviews, using CAPI in combination with the actual paper, is no longer ruled out because of financial limitations. For reasons of sample control and validity, we believe this, our method, to be preferable to other possible methods.

This survey once again shows that in a multiple-section newspaper, there is a considerable loss of readership from the first (news)section onwards. This loss of readers is by no means compensated for by the existence of a target audience, interested in a specific subject. Therefore, if an advertiser is looking for people interested in, for example, cars, the first section is always a better choice than any later section devoted to motoring.

Background

All over the world there is growing interest newspaper section readership, as the Worldwide Readership Research Symposium in 1997 showed. Papers were presented giving results from the US, the UK, the Netherlands and Denmark. The backgrounds to these studies were very similar. Newspapers are growing in size, and divide their content over an increasing number of sections. Birt (1997) even speaks of 'the massive explosion of newspaper sections since the late 80's'. From time-budget surveys, we know that many people have less leisure time at their disposal, while at the same time the number of activities from which readers can choose is increasing rapidly (Faasse, Van Meerem, 1997). We want to know the effect on reading behaviour. Does the reader still manage to leaf through the whole paper?

All research results indicate that there are many ways of reading a newspaper: some people read their daily paper carefully, section by section, while others skip directly to those particular sections which most interest them (Higginbotham, Cognac, 1997).

Tools developed for the measurement of newspaper section reading must on the one hand clarify basic reading behaviour as regards newspapers, and, on the other hand, must help in providing insight into the medium's contribution to advertising effectiveness. The figures can also be a helpful tool in discussions about differential advertising rates, as related to the position in the newspaper. At the moment, newspaper advertising is being bought and sold largely on the basis of a newspaper's overall readership, based on traditional AIR figures. For two reasons, this may be misleading: a) the number of readers varies over the sections, and b) individual sections have their own separate audiences and profiles (see also Arnaa, Randrup, 1997).

In the Netherlands in 1995/1996, The Media Partnership, Veldkamp and NIPO jointly developed a model for measuring page traffic within print media, based on modern CAPI technology and new research insights. The first large-scale quantitative research was carried out in 1996. It was called The Newspaper Sections Survey (in Dutch: Het Katernenonderzoek). As previously mentioned, the methodology and results were presented in Vancouver (Bronner, Van Niekerk, Brennecke, 1997). This study generated discussion about the relevance of the traditional AIR figure as 'a coin' for advertising. The Dutch section research was an impetus to develop new views on newspaper readership and the value of newspaper advertising by media planners, publishers and advertisers.

Media-planning agencies applauded this initiative of The Media Partnership and decided to collectively support a broad follow-up study in 1999. This collective effort would broaden the base of knowledge by incorporating regional papers and evening papers in the survey (in the 1996 study, the results of two national morning papers were measured).

Through the National Advertisers Association (BVA), advertisers explicitly endorsed the research done by the Media Agencies. They also felt that if the 1996 results could be corroborated, then it was time for the newspapers to introduce a more differentiated pricing system for advertising, based on the section or place of the ad in the paper.

The newspapers themselves took a defensive stand, opting for delaying tactics by questioning the methodology of the PMA study and starting a discussion about the best way to measure reading behaviour: face-to-face or by postal questionnaires, measurement of the entire paper versus specific ads and pages.

In this paper, we elaborate on the results of the discussions between planners, advertisers and publishers which took place between 1996 and 1999. We focus on two points:

a. what is the optimal way of measuring section readership? Strong and weak points of the different methods will be sketched and a rationale for our choice will be presented;
b. we now have results drawn from a broader variety of papers than in 1996, and we currently feel more comfortable about drawing conclusions about newspapers in general. The 1996 study can be seen as generating several hypotheses which could be tested now.

First, we want to shed some light on the different methods.

Methods

In the Netherlands, between 1996 and 1999, four different methods were used for measuring reading behaviour as regards newspapers:

a. CAPI, face-to-face, entire newspaper (the model used in The Newspaper Sections Survey)
b. postal questionnaire (one of the models tested by Cebuco, the research and marketing organisation for the daily press)
c. telephone questionnaire (also tested by Cebuco)
d. face-to-face, focusing on specific ads and pages (the RRO model of the Perscombinatie, one of the three large newspaper publishers in the Netherlands).

In an article in Admap in April 1995, Guy Consterdine evaluated 7 possible solutions for measuring the readership of newspaper sections.

The variety of different appearences of newspaper sections is bound to confuse the reader. This leads him to conclude that "… the most acceptable way of measuring the readership of a section is to show informants the whole newspaper (including all its sections) and ask them to go through it page by page". But: "of course, a page by page study is fiendishly expensive". Nevertheless the Dutch Media Agencies preferred the face-to-face method. As Consterdine also notices, these costs have their influence on sample size. We had to restrict ourselves to samples of 125 per issue, which unfortunately leaves limited possibilities for analysing different target groups.

The methodology is extensively described in the 1997 Vancouver paper. To recapitulate: the questionnaire is completed by the research team early in the morning on the day the paper appears (for morning papers). On the same morning the interviewers receive the questionnaire via e-mail. They are instructed to buy the relevant newspapers themselves and they can start interviewing the same evening. The methodology combines the advantages of a face-to-face CAPI questionnaire and the use of the whole newspaper. The important aspect of the timing of the interview is also fully under control.

The research design meets the requirements formulated by Jenny Beck: "the key to the research design will be (a) flexibility and (b) the ability to make last-minute revisions to the questionnaire" (Beck, 1994)

Newspaper section readership is measured on four hierarchical levels:

- 'open eyes' before open pages
- read/noted something on a page
- specific advertisements/editorial articles are read/seen/looked at
- assimilation of the message (impact/effectiveness)

During the past two years Cebuco, has piloted alternative ways of measuring newspaper section readership, by means of a telephone questionnaire as well as by a postal method. We intended to incorporate their results into this paper so as to enable a full and comprehensive overview of the advanages and disadvantages of the different methods. Unfortunately, the newspaper industry has decided not to publish the results and to withdraw the proposed Cebuco paper. From the original proposal we learn that the telephone interview, albeit having advantages in terms of logistics, control and speed, did perform less well when it came to validity.

Interestingly enough, in Vancouver in 1997 both Higginbotham & Cognac and Arnaa & Randrup described surveys using a telephone method, without really questioning the respondents' ability to correctly recall section readership merely on a verbal stimulus.

However, Arnaa & Randrup do report on a test in which results for section readership for the first 3 sections, based on a telephone interview using page-traffic (newspaper fetched) and a telephone interview using claimed reading did not differ much, especially not for in-home reading.

Cebuco did prefer a mail questionnaire, which was put to a second test in March 1999. After a screening by means of a telephone interview, both questionnaire and newspaper were sent to the respondents. Though evidently being much cheaper than any face-to-face method, and having the same advantage of providing the ability to use the full paper, a mail questionnaire obviously has a number of important shortcomings.

One is a matter of timing. The questionnaire and the newspaper will arrive at least one, and in many cases two days after the date of issue, which means many respondents will have been reading another issue, which may be a source of confusion. An advantage is that respondents can fill out the questionnaire at a time of their own convenience, but this might also lead to another delay of one or more days, with additional problems of memory loss. The interviewer is not there for respondents who need clarification, nor to encourage them to really to leaf through the paper again page by page. Internal non-response was mentioned as one of the problems of the mail method.

Finally, PCM (formerly Perscombinatie) has adopted the methodology of the Advertising Response Tests (Reclame Reactie Onderzoek - RRO) to obtain their own results on section readerhip. The RRO is based on the recognition method of Daniel Starch. In a face-to-face interview, the respondent is asked to look at a number of specific pages of an issue of a newspaper. He or she has to indicate whether the page has been opened before ('open eyes') and whether one or more advertisements were noted.

The methodology was not originally intended for measuring section readership, but to help advertisers to develop advertisements with more impact. But once the database of advertisements is large enough, and the distribution of advertisements covers enough sections, implications for section readership could be inferred.

An important difference from the PMA study is that instead of going through the whole newspaper, the focus is immediately on the pages where the advertising is located. Whereas the PMA study is regarded by respondents as a study on reading behaviour, they tend to see the RRO as an advertising study. The focus on a relatively small number of advertising pages tends to increase the scores found.

The two Dutch section studies: 1996 and 1999

In the 1996 section research, the measurement concerned two national daily morning papers: De Volkskrant and De Telegraaf. For each of these titles, four issues were scrutinized. The selection of these issues was spread as much as possible: firstly, spread over days of the week, and secondly spread over several weeks. In total, data were collected concerning 8 issues. For each issue, n= 125 respondents were interviewed, giving a total of n= 1,000 respondents. The sample consisted of readers of the respective papers, with a proportional representation of subscribers and single-issue buyers, and a proportional representation of the Netherlands.

In the 1999 research the same procedure was followed, but this time regional papers and evening papers were also selected: NRC Handelsblad (national evening paper), Algemeen Dagblad (national morning paper), De Gelderlander (regional paper), Dagblad de Limburger (regional paper). Data were gathered concerning 8 issues (two issues of each title); 8 times 125 respondents were interviewed. In diagram 1 we present the main characteristics of both studies.

Diagram 1: The two Dutch newspaper sections surveys: main characteristics

	1996	1999
• period	April/May	January/February
• newspapers	two national morning papers	one national morning paper, one national evening paper, two regional papers
• issues	8 (2 x 4)	8 (4 x 2)
• data-collection	CAPI, entire paper	CAPI, entire paper
• method	4 hierarchical levels*	4 hierarchical levels*
• sample	subscribers/single-issue buyers	subscribers/single-issue buyers
• sample size	8 x 125 = 1,000	8 x 125 = 1,000
• commissioner	TMP	PMA
• agency	Veldkamp/NIPO	Veldkamp/NIPO

* level 1: open eyes before open pages, level 2: something read/noted at a page, level 3: ad/article seen/read, level 4: ad effectiveness

At page level in 1996, data were available concerning 446 pages, while the corresponding figure for 1999 was 418. The number of sections is also nearly equal: in 1996 the 8 issues that were the subject of research included 32 different sections, and in 1999 there were 34 sections.

Reading behaviour as regards newspaper sections

In 1999, results were measured for four papers not included in the previous study, but these results were very consistent with those from the 1996 study. Different definitions can be used for section reach (see Bronner *et al*, 1997), but the one most accepted by publishers and advertisers is 'average page open eyes', which means that the average open eyes score of all pages of the section is calculated. Table 1 shows the consistency.

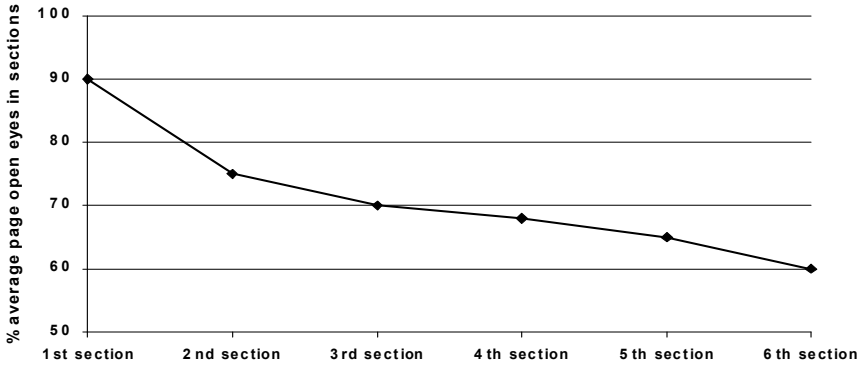
Table 1: Open eyes and sections, comparison 1996 and 1999

	average page open eyes* in sections	
	1996	**1999**
• in section 1	89%**	90%
• in section 2	74%	75%
• in section 3	65%	70%
• in section 4+	64-60%	69-64%

* we measure at four levels: the first of the hierarchical levels concerns the measurement of open eyes before open pages.
** reading example: the pages of section 1 have an average open eyes score of 89%.

In graphical form, a general extrapolation can be made of open eyes scores for pages in sections (see Figure 1). As it turned out, this graphical representation became the most referred-to result of the study.

Figure 1: Open eyes and sections, an extrapolation



If a stronger measurement definition is used (second of the hierarchical levels), the same consistency can be seen at a lower level. The results of average page reach (average reach (= something read/noted on a page) scores of all pages of the section) are presented in table 2.

Table 2: Reading of sections, comparison 1996 and 1999

	average page reach	
	1996	**1999**
• in section 1	71%	70%
• in section 2	47%	51%
• in section 3	38%	45%
• in section 4+	40-30%	42-40%

The average page open eyes scores decrease over the sections from 90 to 60, the average page reach scores decreasing from 70 to 35 to 40. The greatest decrease is between the first and second section, while after the third section the curve declines gradually and slowly. The main conclusion based on the sections surveys is that you lose one third of your readers between the first section and the last section.

Interestingly enough, the first results obtained from the PCM RRO studies, and published in Adformatie, resulted in nearly identical average page open eyes scores for the first three sections!

Of course, there are deviations from this general line. One regional paper (Dagblad de Limburger) has the policy of placing the regional news in the first section and the main national and international news in the second section. This newspaper keeps up the open eyes score in the second section to 84% (nearly 10% above the average in Figure 1). This local paper has apparently developed a good formula for limiting the decrease in reach.

But there is also an exception in the other direction: the second section of the Saturday edition of the Algemeen Dagblad deals with economics and scores only 53% average page open eyes, about 20% below the general line of Figure 1. As regards the other sections (1st, 3rd, 4th +), results from all newspapers are very similar and no significant deviations can be ascertained.

In the analysis of factors which influence reading behaviour, the thickness and size of a paper are very strong factors. In issues with 30 pages or less, the average page reach score is about 70% and the average open eyes score is between 80 and 85%. In issues with 70 pages or more, the average page reach score is between 40 and 50%, and the open eyes score is around 60%. Other stimulating factors which emerged:

- right-hand pages
- front pages
- use of full colour
- the combination of editorial content and ads (in Dutch: IM's)
- pages with births, marriages and deaths
- a mix of national and international news.

In the above section we presented the results of page open eyes and page reach scores: the first levels of our hierarchical measurement model. In the next section we proceed to the third level: advertising reach.

Advertisement reach and visibility

The use of CAPI allows the possibility of selecting advertisements on which impact measurement can be carried out. About 10 advertisements were chosen from each newspaper, spread over the various sections, and further spread as to product, size and position. To avoid bias, questions about these ads were mixed with questions about the reading intensity of some specific editorial articles. From the 1996 study, data on 82 ads are available, while in the 1999 study, data concerning 75 advertisements could be added.

Table 3: Advertising reach, comparison 1996 and 1999

	advertising reach	
• research 1985 (Cebuco)	33%	
• section research 1996	36%	
• section research 1999	30%	33%

Over all the available 157 ads, the average reach is 33%. In 1985, Cebuco (the collective newspaper organisation) also concluded that the advertising reach was 33% (study: Dagbladen Binnen Bereik). So we conclude a very high stability over time (1985, 1996, 1999). Sometimes one can hear the whisper in the newspaper world that general conclusions about reading behaviour with regard to newspapers are very difficult to draw because of the high variation. Our figures refute this hypothesis and demonstrate high consistency.

The section in which the ad is placed has a strong influence on the reach score. Eighteen ads of the seventy-five in the 1999 study score above 35% reach (the winners); fourteen of these eighteen (nearly 80%!) were placed in the first section. Eleven ads have a reach score below 20% (the losers). Only two of these eleven (18%) were in the first section, and more than half of them were in the 3rd+ sections.

Ads in the first section have an average reach score of 35%, and ads in the second section have an average reach score of 25%. The difference in ad reach between the first and second sections is about 10% (35% versus 25%). In the Danish Gallup study (Arnaa, Randrup, 1997), presented in Vancouver, the difference in advertisement reach between the first and second sections was 12%. So our findings are in line with international findings in this field.

As we saw in the preceding part of this section, advertisement reach takes place in the 'slipstream' of section and page traffic. To separate advertisement effect and page effect, we developed a kind of 'visibility measure' (in Dutch: zichtbaarheidsindex). In this measure we divide the advertisement reach score by the page reach score. If an ad is unfortunately on a page with a low reach score but is seen by a relatively large number of the readers who arrive at this page, the visibility measure will be much higher than the advertising reach score.

Let us illustrate this with two imaginary examples:

- ad A is on a page with a page open eyes score of 90% and itself has an advertising reach score of 33% → the visibility index is 33/90 = 37
- ad B is on a page with a page open eyes score of 58% and itself has an advertising reach score of 33% → the visibility index is 33/58 = 57

As regards ad A the difference between reach score and visibility score is marginal (33 versus 37), so we can conclude that this ad had no clear disadvantage derived from the page placing. As regards ad B we can ascertain a large difference between reach score and visibility score (33 versus 57). So ad B had a clear disadvantage derived from the page on which the ad was placed and apparently realises this reach on its own strength. On a better page, this ad would surely have realised a higher reach score.

In some issues, we were lucky to have a cluster of ads within the same domain but differing according to section. This opened up possibilities for secondary analysis, to trace in greater detail the role of the *position* of the ad in the newspaper.
As an example, we present the telecom case and have made the providers anonymous. In table 4, details about the position and figures are presented.

Table 4: Illustration of page effect on ad reach

	location of ad	% open eyes page	ad reach
• provider A	p.16, back page 1st section	75%	54%
• provider B	p.30, back page 2nd section	46%	31%

The two ads of both telecom providers are comparable: same topic (mobile phones), same size (full page), same execution (full colour), both well-known providers (the prompted awareness score for both providers is above 90%), same position (on the back page of a section), but with one difference: provider A was at the back of the first section and provider B at the back of the second section. The ad reach score of provider B was 23 percentage points lower than the ad reach score of provider A (54 versus 31).

How is this difference to be explained? The page open eyes scores demonstrate that provider B can never have the same ad reach score as provider A, because the page on which provider B's ad is placed comes under the eyes of only 46% of the readers. If we calculate the visibility index, the difference between the two ads falls away, as is shown by the figures below.

visibility score
provider A: 54/75 = 72
provider B: 31/46 = 67

Conclusion: provider B was subject to a very strong disadvantage because of it's page placing. After correction, both ads seem to perform at a similar level of impact.

Comparable analyses were carried out in the cars domain and in the supermarkets domain, leading to the same conclusions: some ads are subject to a very strong disadvantage because of the page on which they are placed. In the main, ads placed after page 32 have a strong uplift, based on the visibility correction procedure. Many ads should have deserved a better fate.

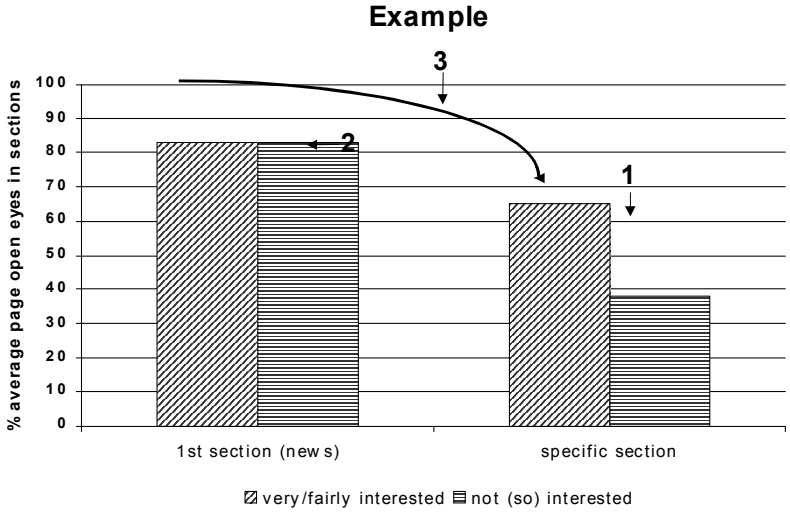
The influence of domain-specific interests

The 1996 section research generated the 'non-compensation hypothesis'. We can explain this phenomenon in stages:

- there is a strong relationship between domain-specific interests and the reading of related sections (financially-interested individuals read the financial section significantly more often)
- there is a decline in reach because of the normal reading pattern in newspapers (see preceding sections in this article)
- the decline in reach is not compensated for by the power of attraction exerted on interested readers of specific sections.

In everyday language: people who are interested in cars do read the car section more thoroughly than do the non-interested segment, but reading scores for car-interested individuals in the car section are still lower than in the first section.
In Figure 2 we present a graphical illustration of this hypothesis with imaginary data.

Figure 2: Visualisation of the 'non-compensation hypothesis'



In the visualisation in Figure 2, three types of comparisons can be made (we refer to the numbers in the graphic):

1. domain-specifically interested readers are more inclined to read a specific section in that domain (interested bar is higher than non-interested bar)
2. there is no reason to suppose that domain-specifically interested readers have different reading behaviour as regards the general news section in comparison to non-interested readers (why should 'car-freaks' read more about Kosovo?), so both bars are more or less equal.
3. among the domain-specifically interested readers, the bar representing the reach of the specific section will still be lower than the bar representing the reach of the news section.

Put in general terms: the loss in reach will not be compensated for by the specific-interest effect. Therefore we strongly disagree with Alison Drummond who claimed in an article in Admap of January 1998, notably based on our 1996 research, that for certain groups of consumers, motoring sections provide 'dozens of opportunities'. They may indeed do so, but not at the same advertising rate that one pays for the news section.

Support for this non-compensation effect was found for different domains in all four newspapers involved in this study. The effect was strongest in national papers. We present two examples in Figures 3 and 4 (national newspapers).
Figure 3 relates to the car section and Figure 4 to the tourism and travel section. As regards the car section, the average page open eyes score for car-interested readers was 62%, much higher than the score for the non-interested (34%), but far less than the score in the first news section (89% versus 62%). The same profile is found concerning the travel section. Readers interested in travel and holidays do read the tourism section much more, but the page opening figures are still far below those for the news section.

Figure 3: An illustration of the non-compensation hypothetis in the cars domain

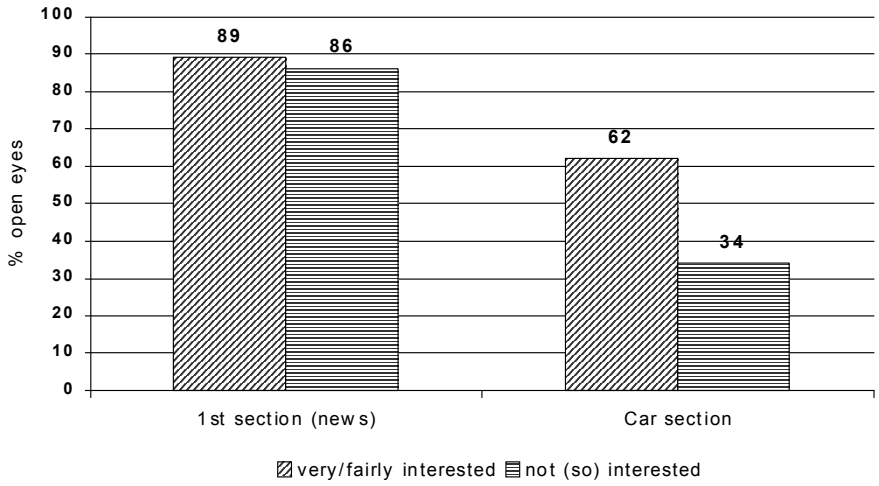
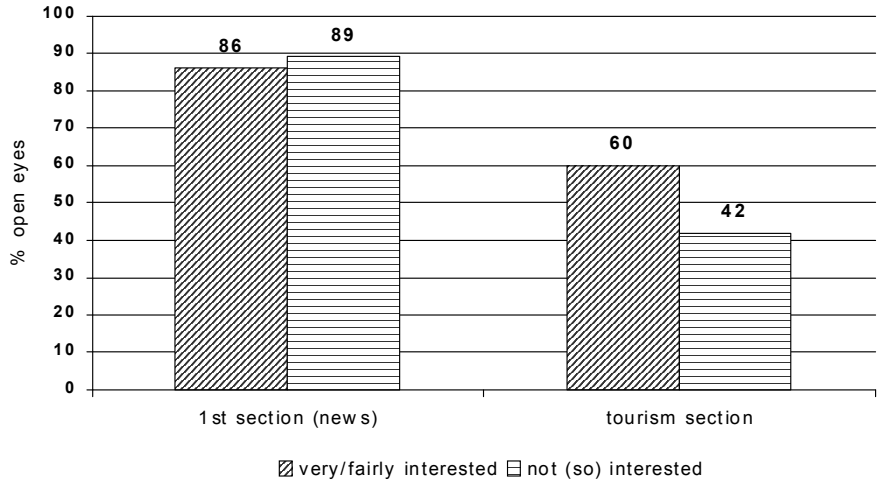


Figure 4: An illustration of the non-compensation hypothesis: tourism and travel



Conclusions

In the newspaper world., one sometimes hears noises to the effect that it is very difficult to draw general conclusions about reading behaviour in respect of newspapers because of the high variation. Unrealizable designs were suggested from the publishers' side. Contrary to this opinion, we find consistency and stability: over time, over type of newspaper, over countries. Therefore we deem it unneccessary either to follow up our research design on a continous basis, which would make it unaffordable, or to resort to other, cheaper research methods, lacking in validity.

We think it is possible to draw general conclusions and to clarify the role of the position within a newspaper.

Reading behaviour declines as we go through a newspaper:

- the average page open eyes scores decline over the sections: from 90% via 75% to 60%
- the average page reach scores decline over the sections: from 70% via 50% to 30/40%.

The size and the number of sections of a paper are factors of great influence on page reach scores.
Publishers now agree that in general there might be a decline, but they put forward the argument that domain-specific interests change the pattern. However, our secondary analysis confirms the non-compensation hypothesis generated on the basis of the 1996 data. This means, for example, that car-interested individuals read the car section more thoroughly than non-interested individuals, but reach figures are still far below the reach levels for the first section.

Several case-analyses show that advertisements can suffer a serious drawback from their position in the paper. Another, more fortunate place would have generated higher reach figures. Of the 18 winning ads, about 80% were placed in the first section. Among 'the losers' only 18% were placed in the first section.

The 1996 study started the discussion about the relevance of the traditional AIR figures for planning purposes. Overall readership is one side of the coin, but readership within the newspapers is the other side. In the professional media and advertising journals, section research was 'hot news' for three months, with many articles and front-page quotes.

The survey meant the start of new negotiations between advertisers, media agencies and newspaper publishers, to work out a rating system which does justice both to the value of the newspaper and its sections as an advertising medium and to the differences in reading behaviour from one section to the next.

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Note

The steering committee of the Dutch Newspaper Sections Survey 1999 consisted of the following persons:

- representing PMA: Swantje Brennecke (TMP)
  John Faasse (Initiative Media)
  Astrid Kuyer (Media Exposure)
  Dorien Sterrenburg (Carat)
  John van Zaanen (Running Mate)
- representing the research agencies: Fred Bronner (Veldkamp)
  Gerrit Jansen van Doorn (Nipo)
  Dieter Verhue (Veldkamp)