

# Newspaper Sectional Reading

**Michele Levine, William Burlace, George Pesutto**

**Roy Morgan Research**

**Sydney: May 31 – Melbourne: June 1**

Roy Morgan Research  
401 Collins Street, Melbourne VIC 3000  
Telephone: (03) 9629 6888

## Agenda

- I. Opening remarks  
*Michele Levine, CEO*
- II. Sectional Reading measurement  
*William Burlace, Director Media Services*
- III. Sectional Reading applications in practice  
*George Pesutto, Industry Director ,Media & Publishers*
- IV. Questions

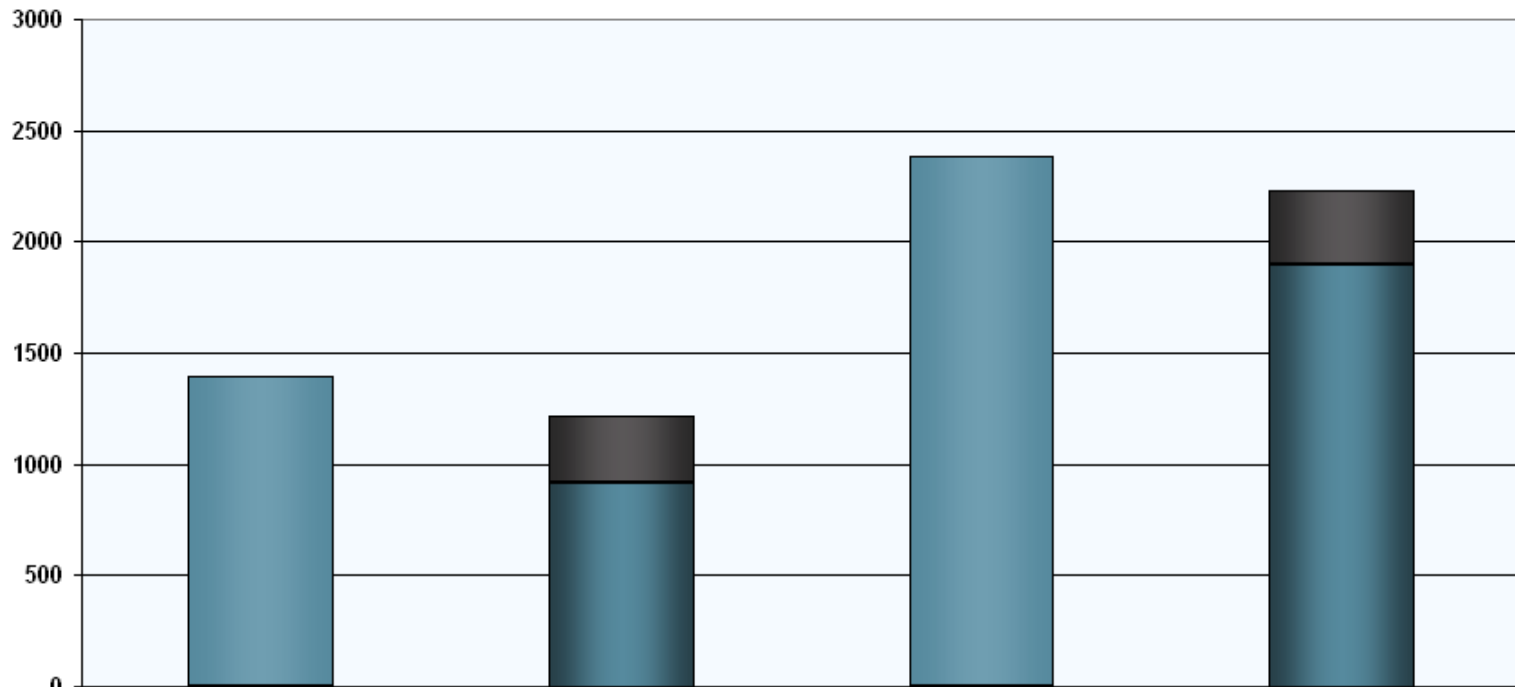
## Success breeds success

- Newspapers in Australia today are in a substantially better position than anywhere in the world
- Arguably this unique and excellent situation is assisted by the fact that newspapers have a survey that enables them to do things that newspapers cannot do in any other country

- 50,000 face-to-face interviews (largest sample in Western world)
- Questions to produce accurate, believable, independent readership figures (incorporating hard copy and online readership - plus mobile phone later this year)
- 360° media measurement with sensible relativities in the same survey (not fusion)
- Accurate multimedia reach and frequency via ASTEROID for advertising campaign scheduling
- World's deepest, broadest targeting and segmentation data
- Deep industry-standard product data
- Monthly results to publishers (quarterly 'currency' data releases to agencies)
- Specially developed world class software (ASTEROID) to manage simple analysis, segmentation, complex diagnostics and scheduling - from beginning to end

# Newspapers are transforming: 2001 - 2011 (print edition)

**Victorian Newspapers (net readership)**  
March 01 vs. Mar11



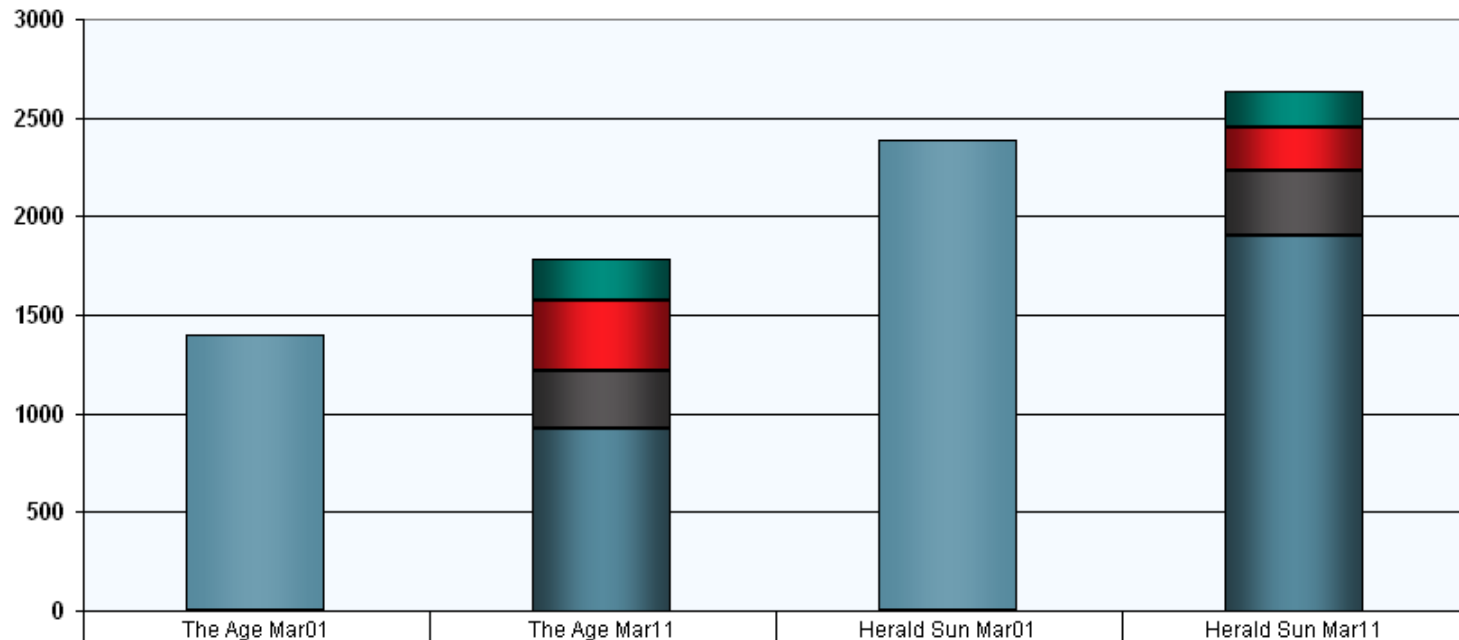
	The Age Mar01	The Age Mar11	Herald Sun Mar01	Herald Sun Mar11
■ Mar01 readership	1,397		2,385	
■ Total Mar11 readership		1,214		2,229
■ Both Print + Online		294		329
■ Print only		920		1,900

\*Source – Roy Morgan Single Source 12m to March 2001 + March 2010

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# Newspapers are transforming: 2001 - 2011 (print + online)

Victorian Newspapers (net readership)  
March 01 vs. Mar11



■ Mar01 readership	1,397		2,385	
Total Mar11 readership		1,779		2,630
■ Online only (non home state)		202		182
■ Online only (in home state)		363		219
■ Both Print + Online		294		329
■ Print only		920		1,900

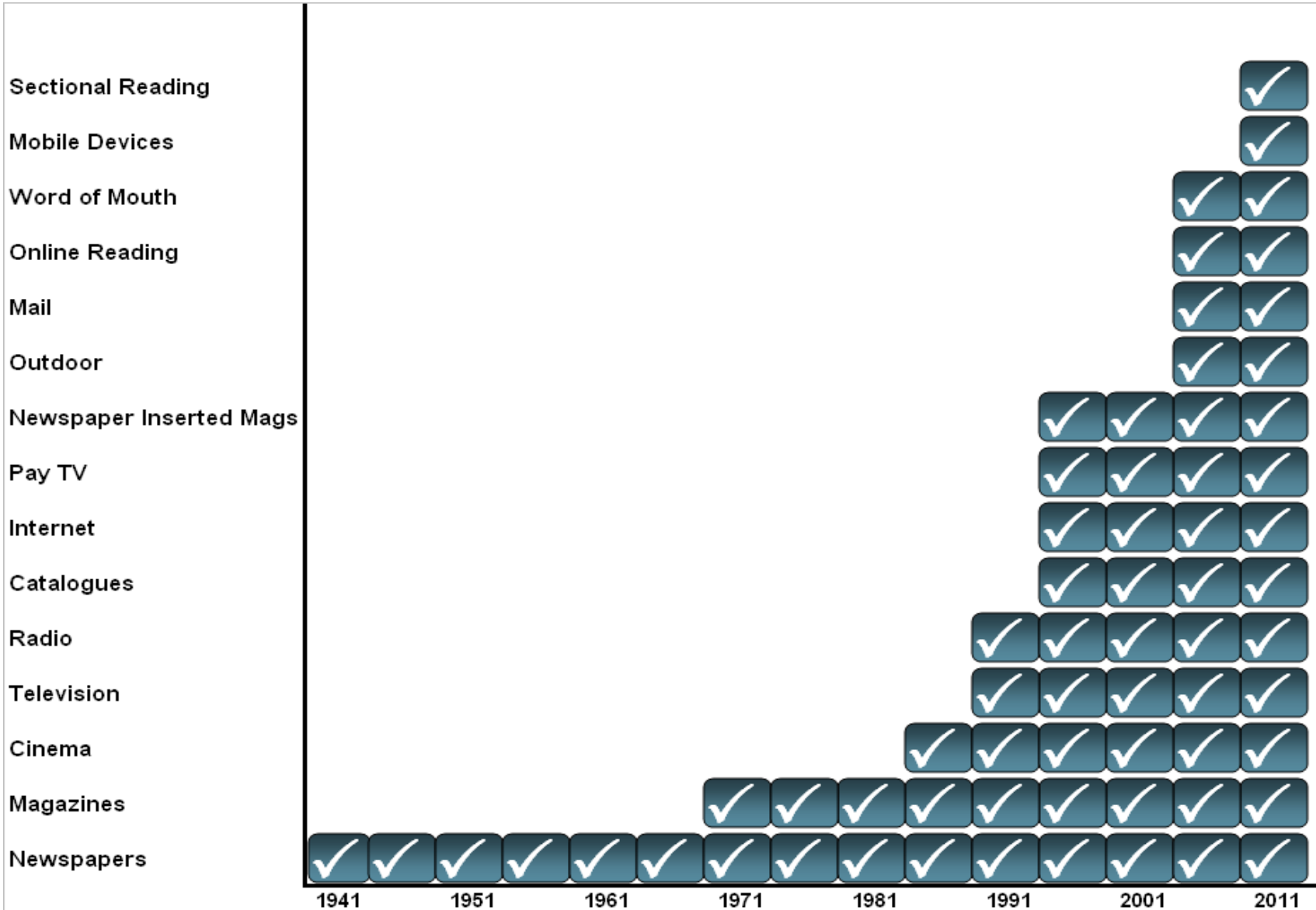
\*Source – Roy Morgan Single Source 12m to March 2001 + March 2010

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# Growth of media measurement in Australia

by Roy Morgan Research

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## ASTEROID software developments

- *Print Optimiser*
- *Cinema Scheduling*
- *WebScheduler*
- *Radio Scheduling*
- *ASTEROID 5*
- *Item Count Filter*
- *Media Reach Index*
- *Charting for Profiler*
- *Cluster Analysis*
- *Correspondence Analysis*
- *Nesting Tables*
- *New Formatting Capabilities*



## ‘Coming soon’

- WAM - Web Audience Measurement
- B2B survey
- Magazine ‘Quality of reading’ measures
- Digital TV measures
- Mobile advertising
- Downloading Apps

**It's time!**

# Sectional Reading measurement

**William Burlace**

Roy Morgan Research  
401 Collins Street, Melbourne VIC 3000  
Telephone: (03) 9629 6888

# Newspapers

When things go down and you want to know what's up

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6 THE AGE  
THURSDAY, MARCH 17, 2011

‘In the tsunami they could see people dying right in front of them.’

— Susumu Hirakawa, clinical psychologist, Tokyo

## JAPAN'S CRISIS



Earthquake survivors seek warmth, and the latest news, in Otsuchi, where some were forced to scavenge for food.

PICTURE: AP



## Sectional Reading

### Roy Morgan data collection

- 1997 Newspaper named sections
- 1998 Newspaper inserted magazines (NIMs) (Good Weekend)
- 1999 - 2008 Usual sectional reading
- 2007 -- Newspaper topic involvement (released Sep09)
- 2010 -- Sectional reading (released Mar11)

## What do we mean by 'section' anyway?

- Part, physical component of paper
- Content, subject, topic of interest
- Publisher defined branded grouping
  
- Name, composition, presentation varies, changes
- Respondent knowledge varies with familiarity and interest

# Newspaper Topic Involvement and Enjoyment

- Newspapers in general – not specific to masthead
- *I especially choose to read this topic/section*
- *I'm interested and read when I have time*
- *I only read if something grabs my attention*
- *I never read this topic/section*
- *I really enjoy this topic/section*

## Input: 22 newspaper sections/topics

• News	• Health and Wellbeing
• Sport	• Fashion and Beauty
• Editorial and Opinion	• TV Listings and Reviews
• Letters to the Editor	• Movie Listings and Reviews
• Business	• Art, Music, Book reviews
• Personal Finance	• Cars and Motoring
• Celebrities and Social	• Computers and IT
• Holidays and Travel	• Home Entertainment & Electronics
• Eating, Drinking and Dining	• Real Estate and Property
• Home Interiors	• Careers and Employment
• Gardening	• Racing/Form Guide



# Sectional reading question - Vic

+

+

+

## Sectional Reading

1. Which sections or topics in the following newspapers do you usually read or look into?

	Australian (Monday to Friday)	Weekend Australian	Financial Review (Monday to Friday)	Financial Review (Weekend Edition)	Age (Monday to Friday)	Saturday Age	Sunday Age	Herald Sun (Monday to Friday)	Herald Sun (Saturday)	Sunday Herald Sun
I do not usually read this newspaper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
News	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editorial and Opinion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Letters to the Editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Celebrities and Social	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Sectional Reading output

## 1. Sectional Reading (topic by masthead)

- *audience measure (000's and %)*

## 2. Sectional Reading Engagement

– *involvement degree and engagement score*

## Sectional Reading (topic by masthead)

- *The level of usual readership of 22 different sections or topics in a newspaper, asked by section/topic, by masthead*
- This measures the audience in the major metro newspapers of each of the 22 sections/topics (both numbers of readers and proportion of the paper's total readership)
- Sectional reading audiences can be profiled by attitudes, activities, purchase behaviour, other media consumption, etc

## Sectional Reader Engagement

- *The degree of reader engagement with a section or topic in specific papers - measured by degree of involvement, by enjoyment, and by a scored combination of the two*
- *This enables comparisons of the overall engagement level of readers of a particular section with the engagement level of (a) readers of other sections in the same paper and (b) readers of the same section in other papers*

## Positive responses from Agency trials

- *“I love this data! It's great stuff as it finally enables us to understand more about how people read newspapers, which sections are actually read and how this differs by weekday/weekend and by publication.”*
- *“Newspaper Topic Involvement gave us an indication of likely sectional readership but didn't allow us to quantify it. Now we can, which is great from a planning & negotiation perspective.”*
- *“It will give newspapers more currency in the market as agencies and advertisers have been looking for a deeper understanding on how readers engage with their favourite section.”*

## Broad results

All sections are not the same

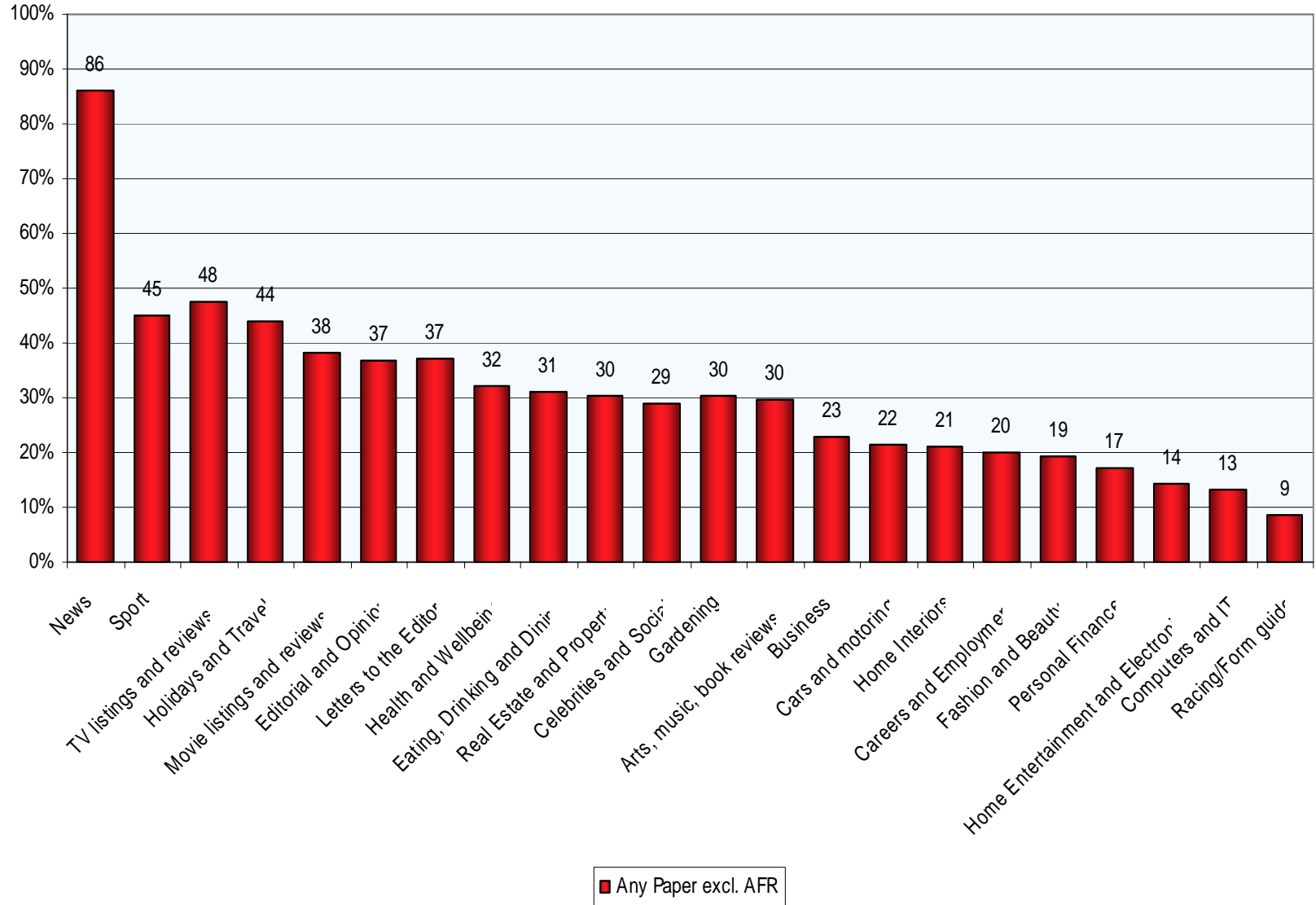
They differ by:

- *Masthead*
- *Mon-Fri, Sat, Sun*
- *Age of readers*
- *Gender of readers*
- *Target audience*

The same can be said for:

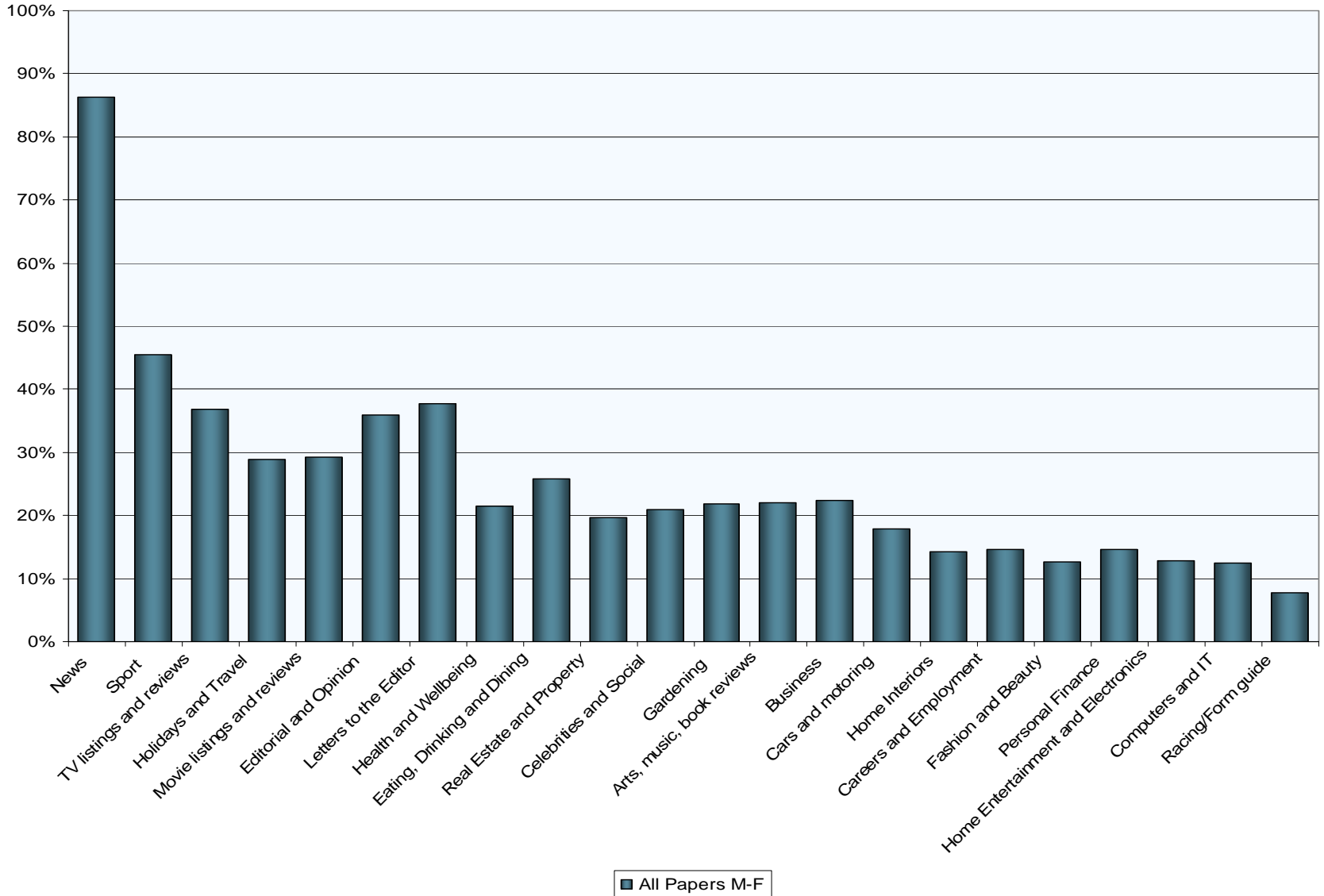
- *Sectional Reader Involvement, Enjoyment and Engagement*

# All Papers (excl. AFR)



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# Mon-Fri papers

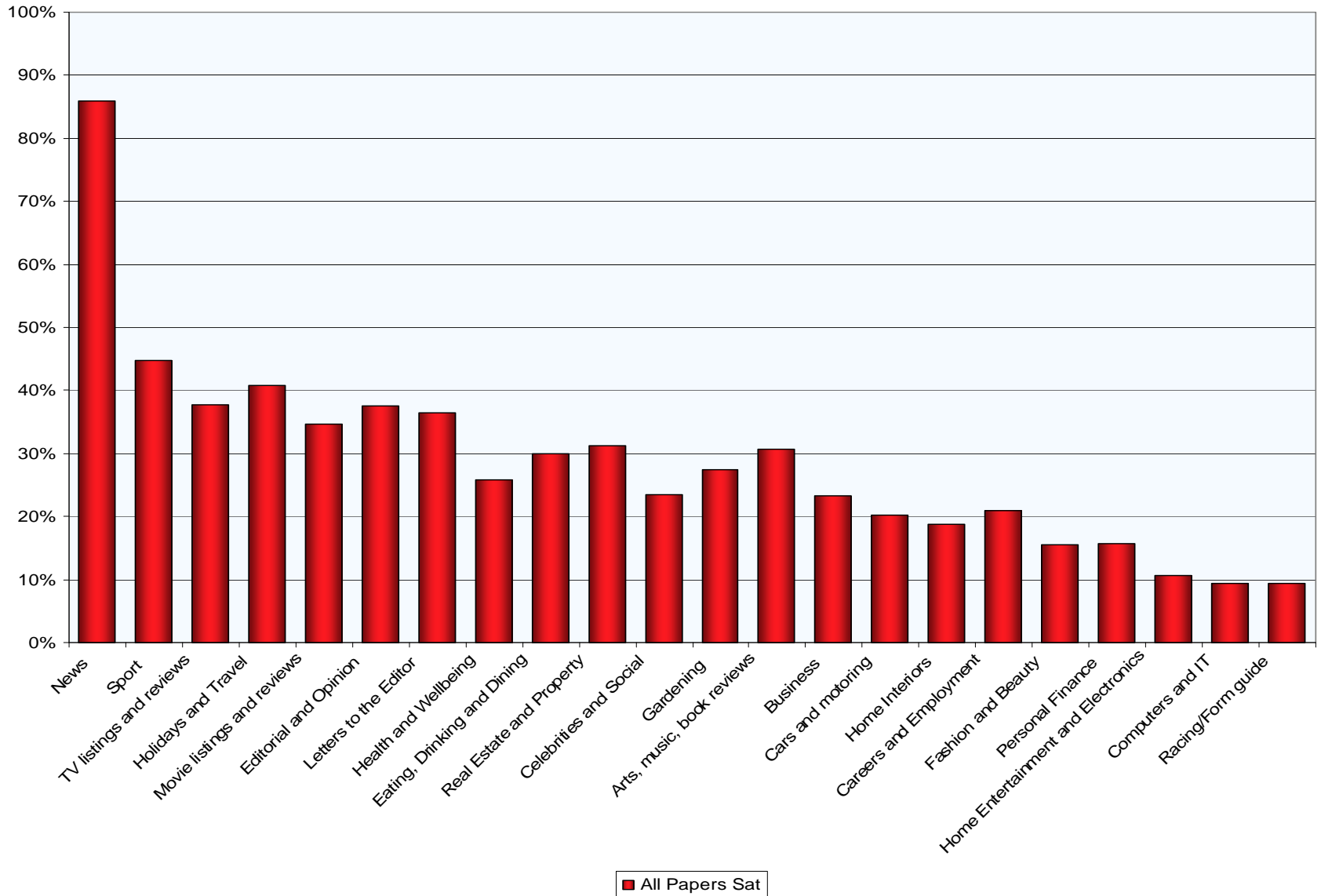


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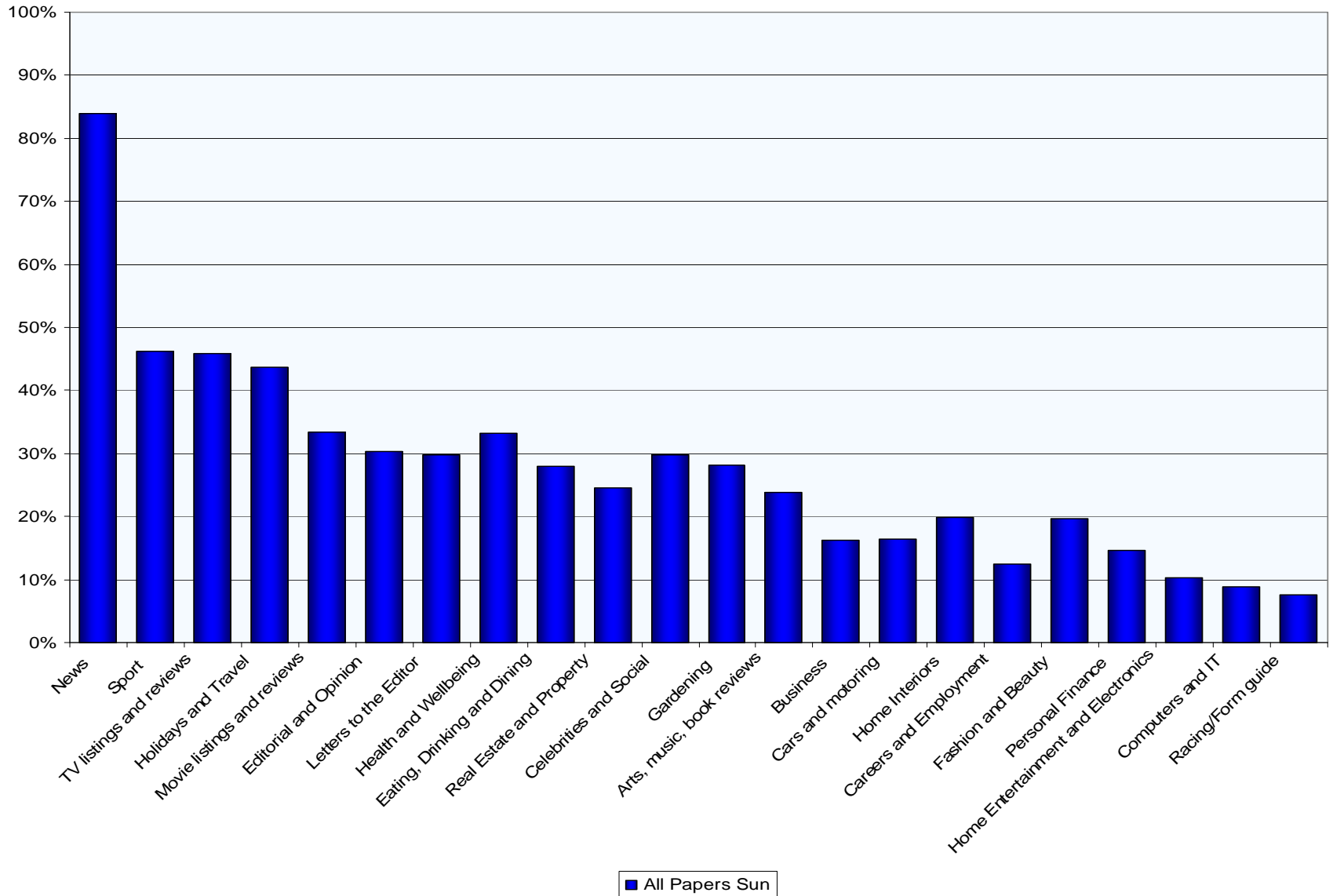
# Saturday papers

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# Sunday papers

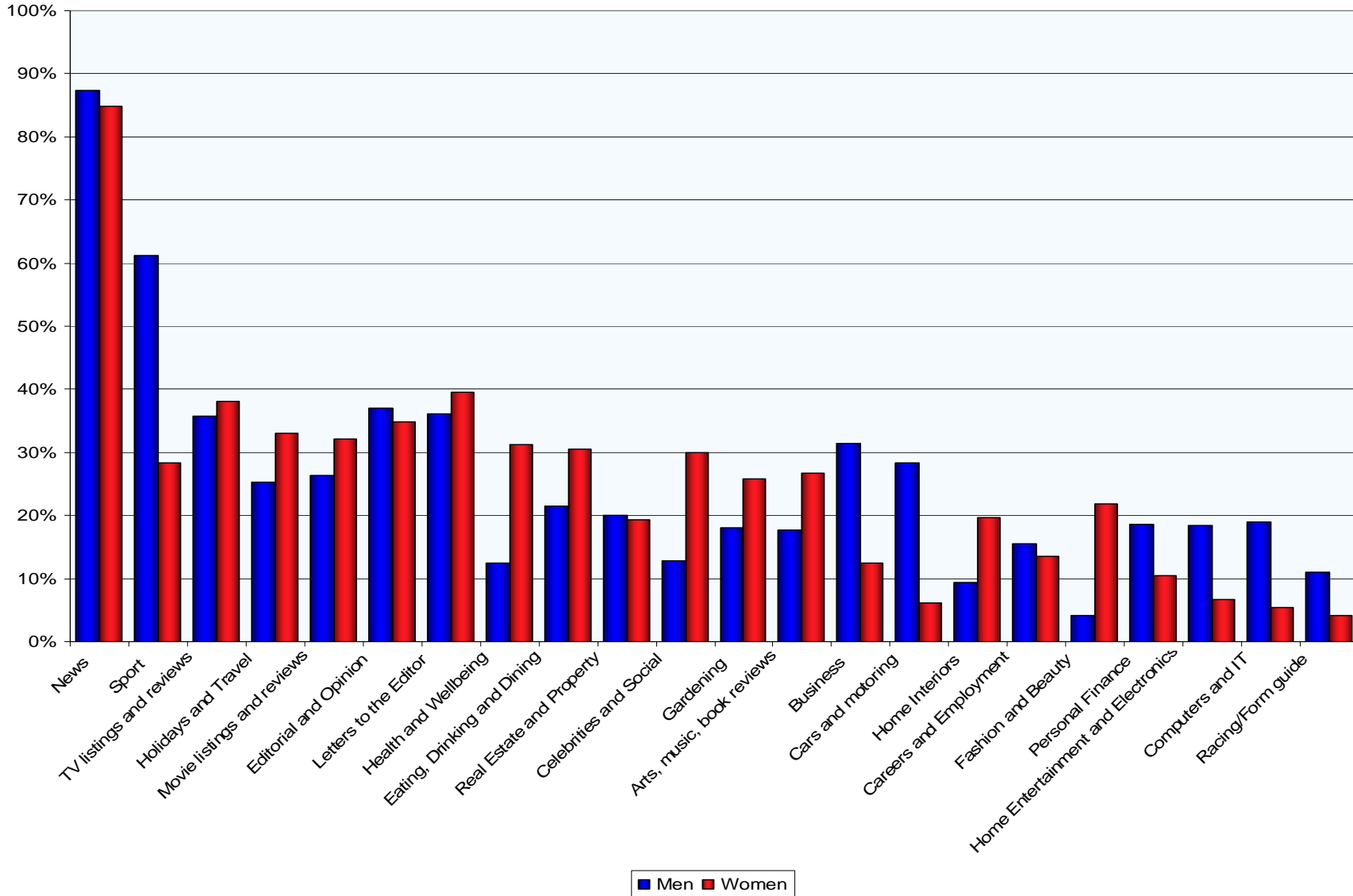
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# Men vs Women

## Mon – Fri papers

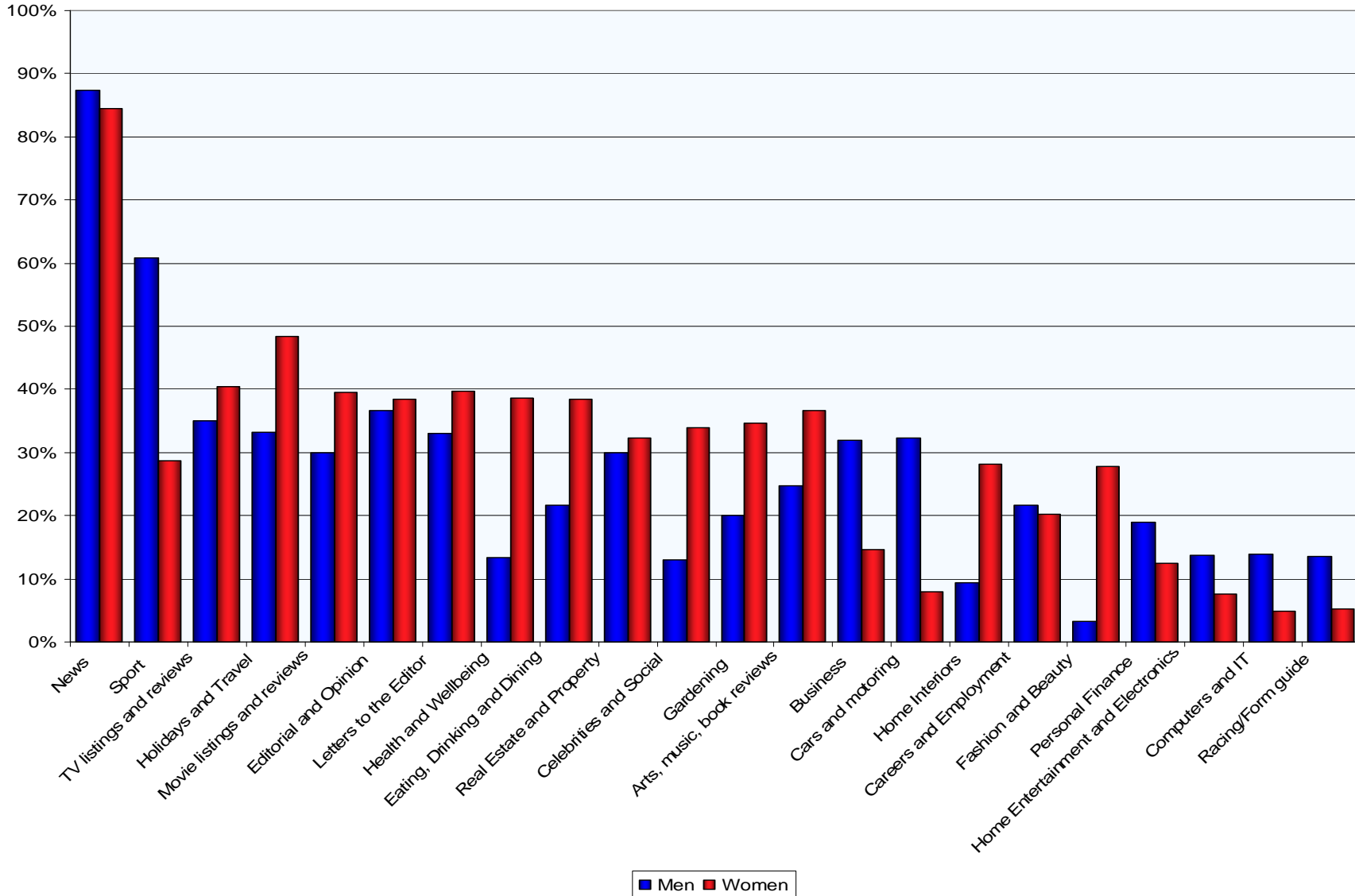
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# Men vs Women

## Saturday papers

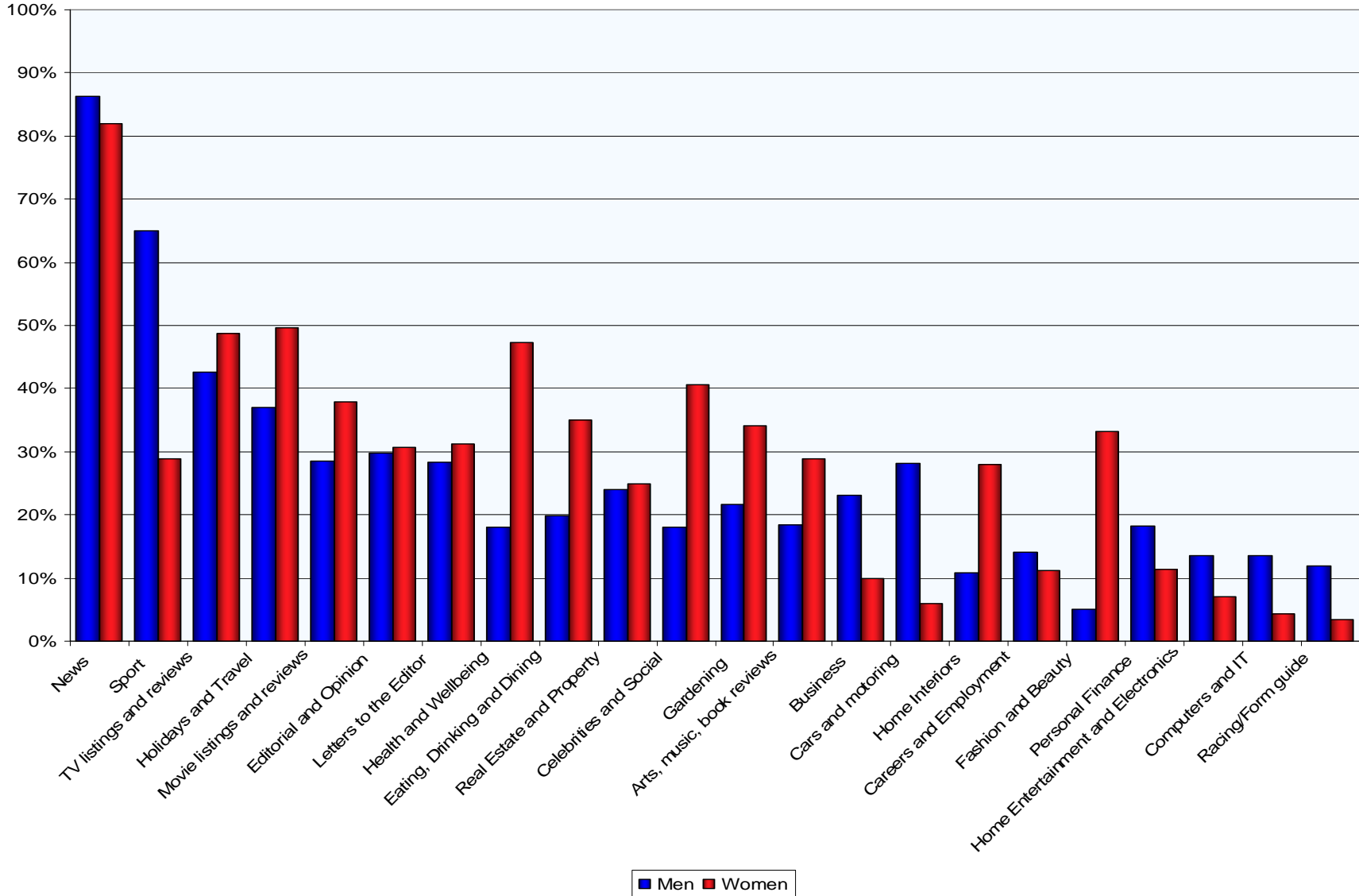
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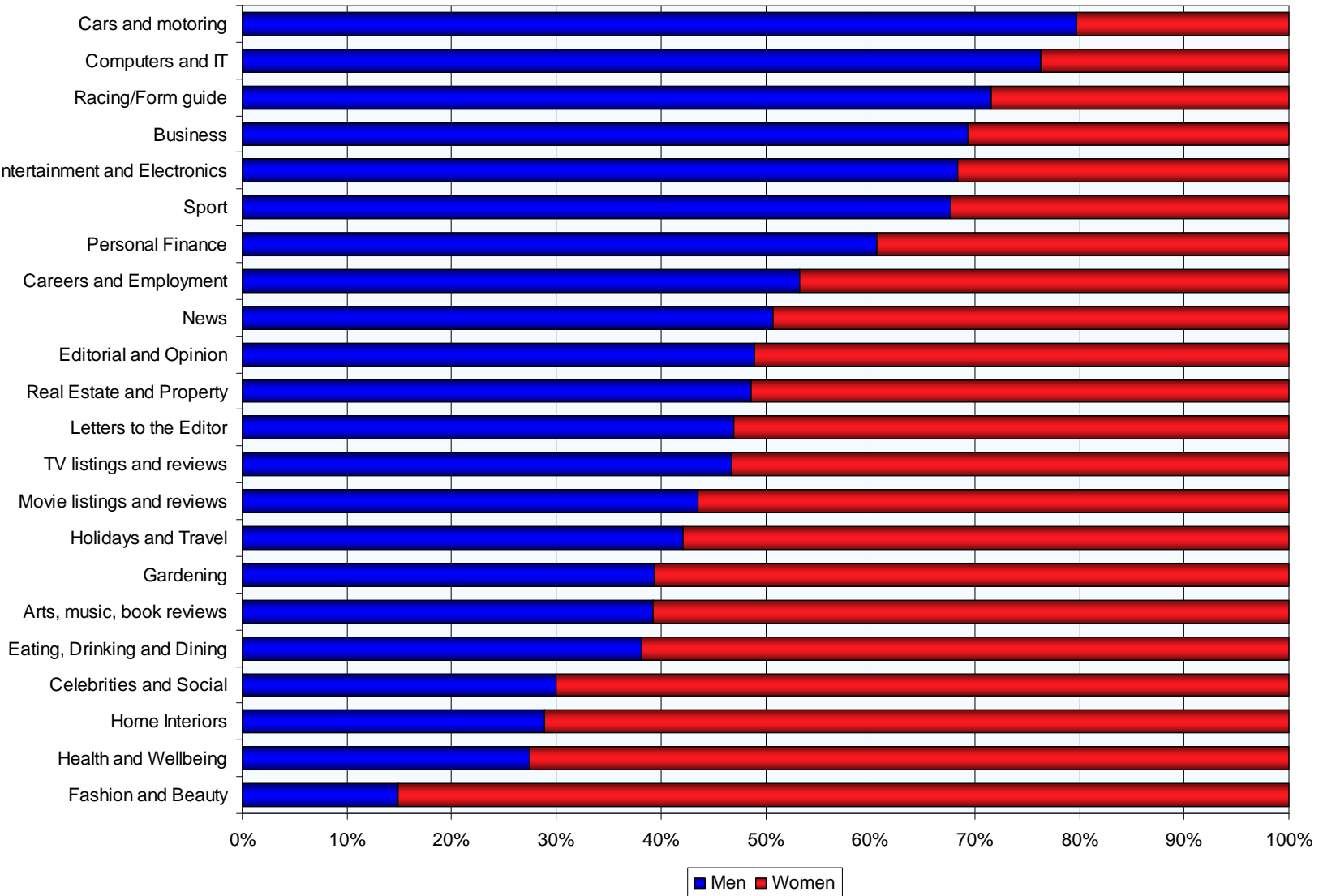
# Men vs Women

## Sunday papers

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# Sections: proportion of Men vs Women – all papers

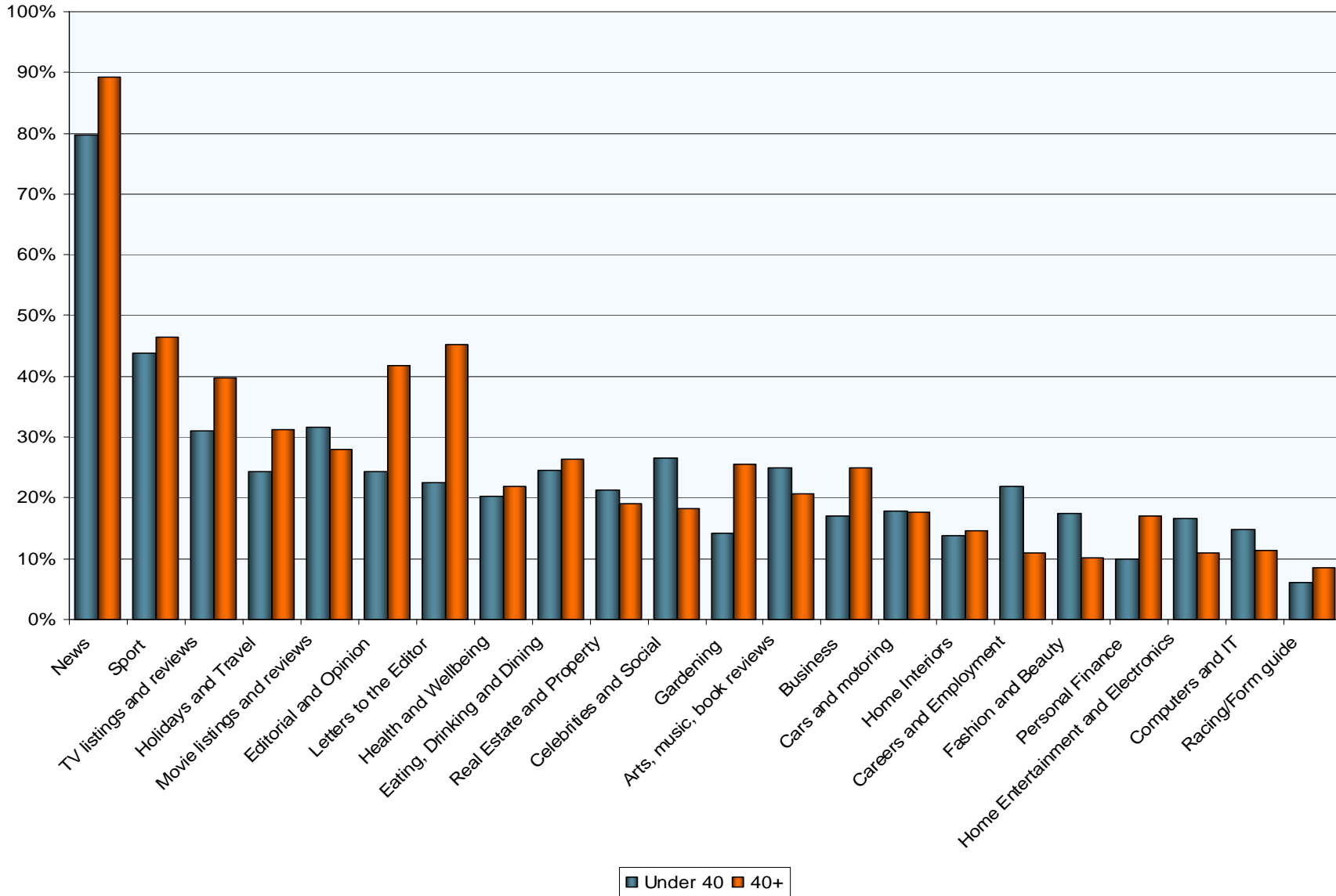


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# Under 40 vs Over 40

## Mon-Fri papers

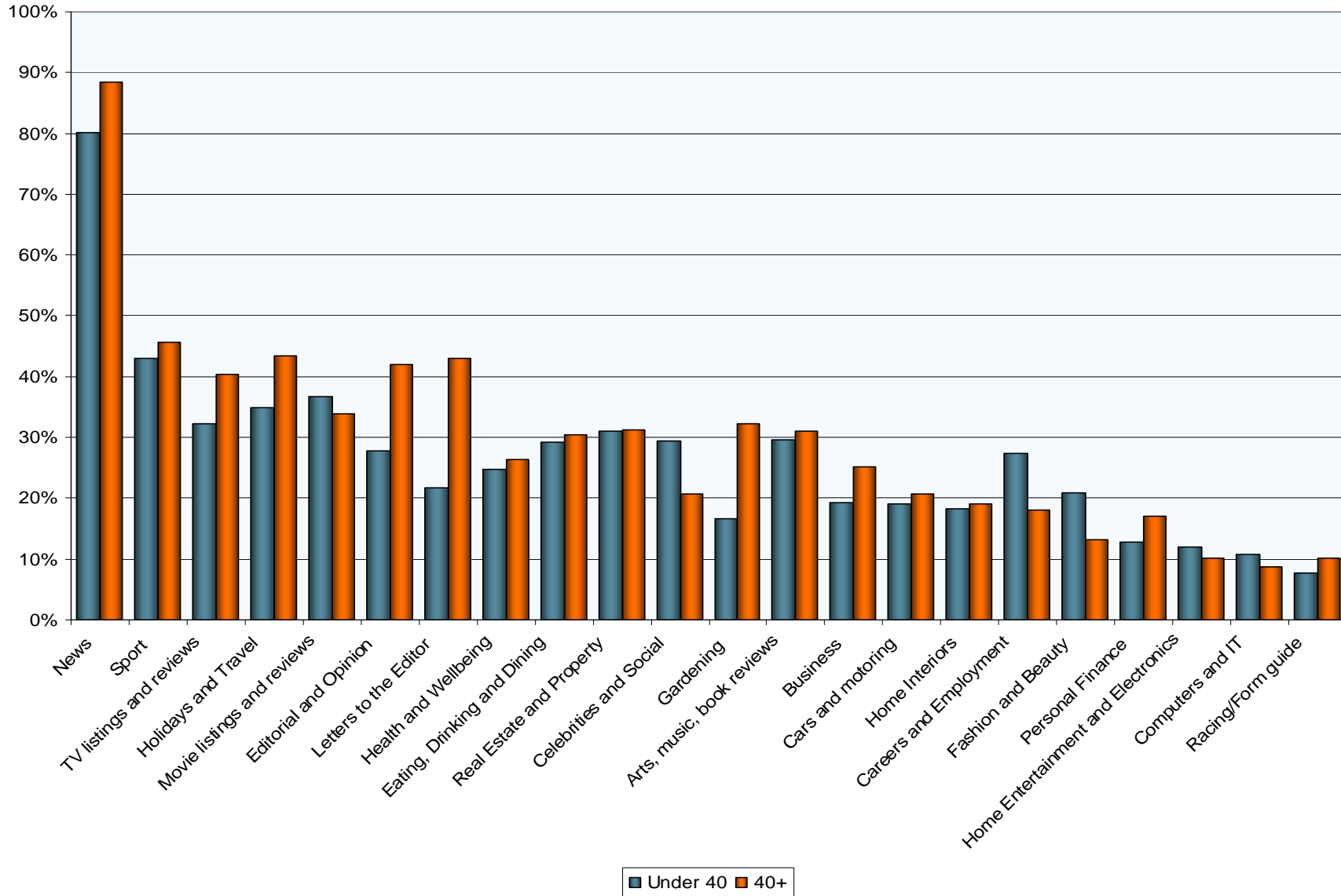
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# Under 40 vs Over 40

## Saturday papers

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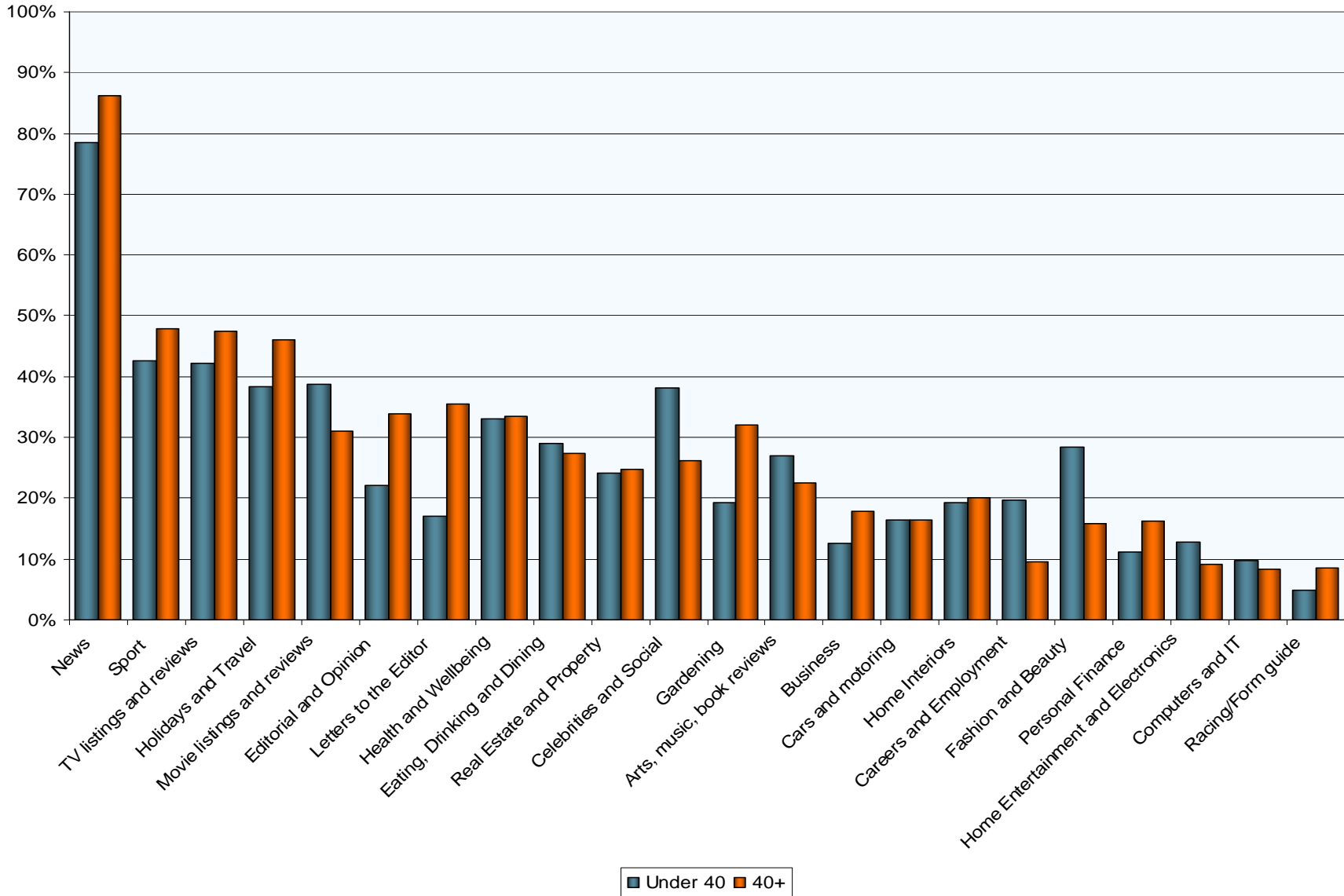




# Under 40 vs Over 40

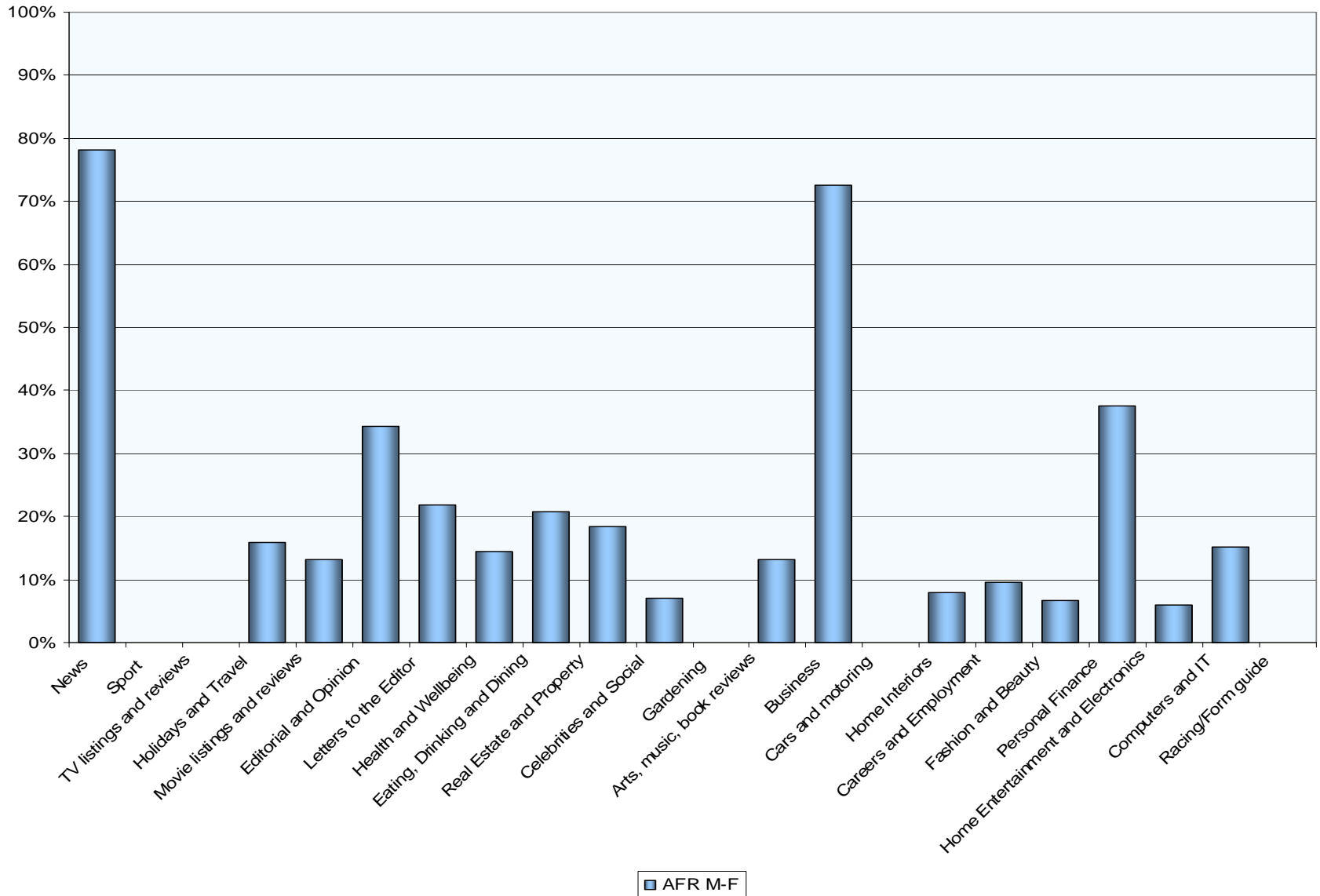
## Sunday papers

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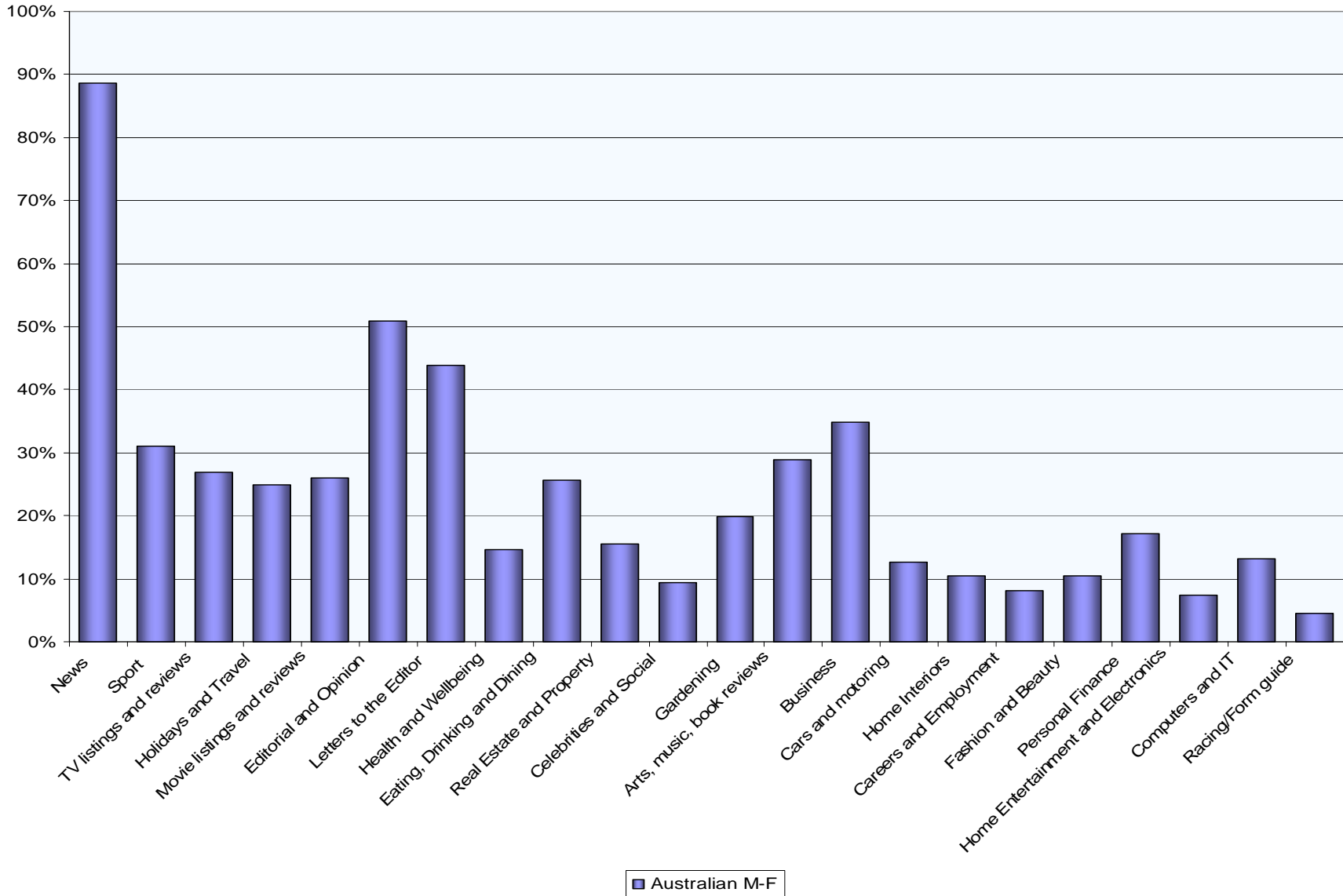
# Australian Financial Review M-F

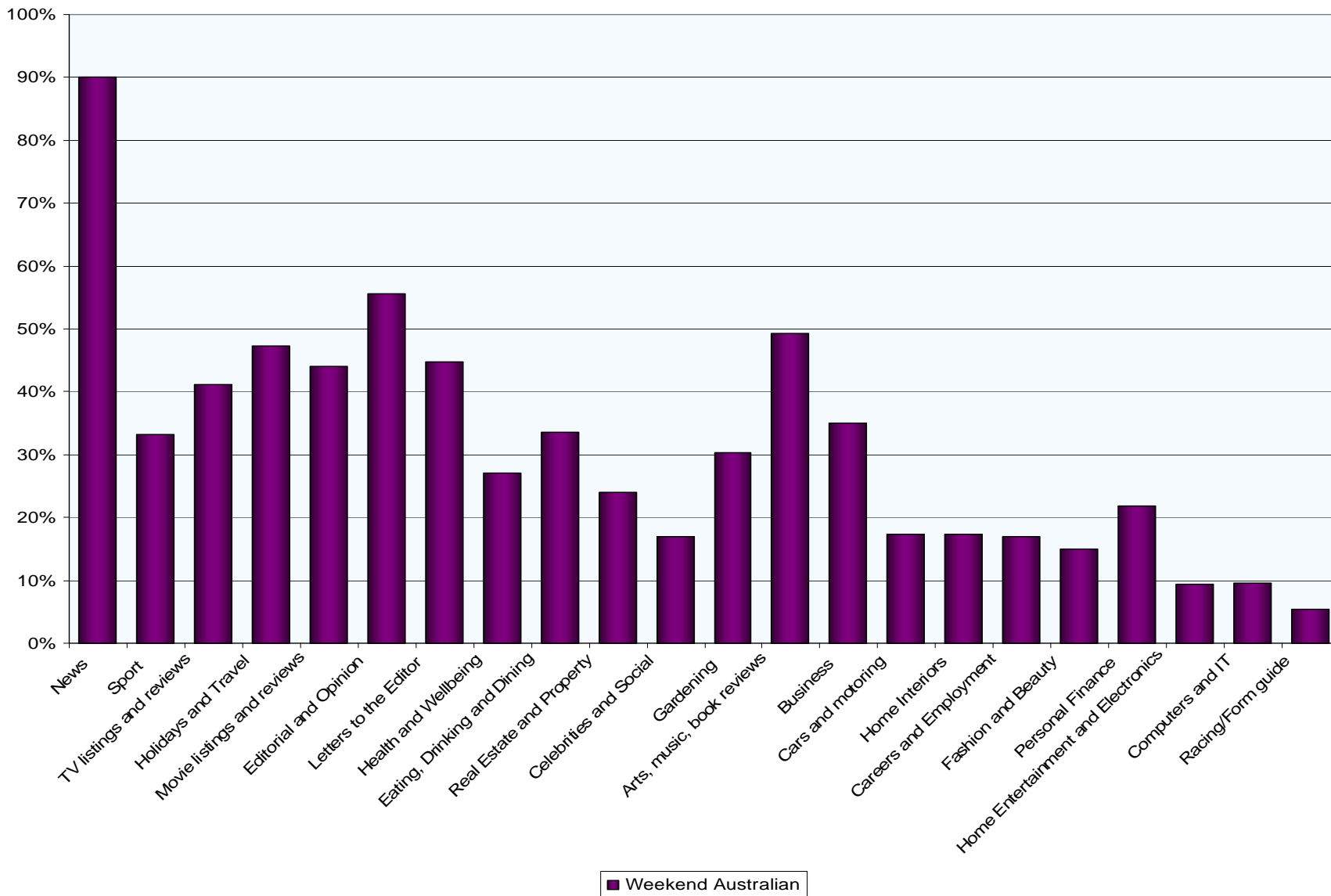
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# Australian M-F

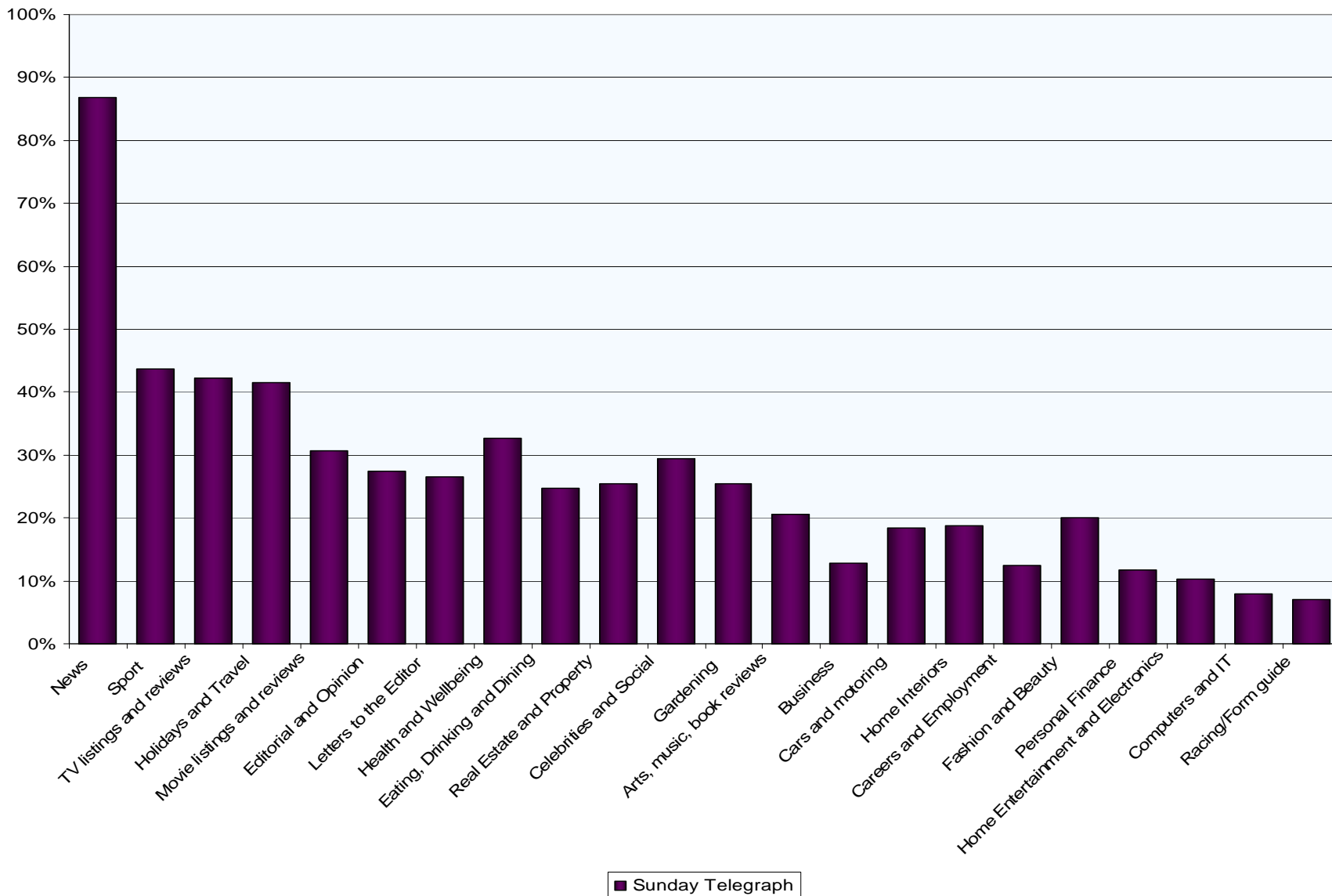
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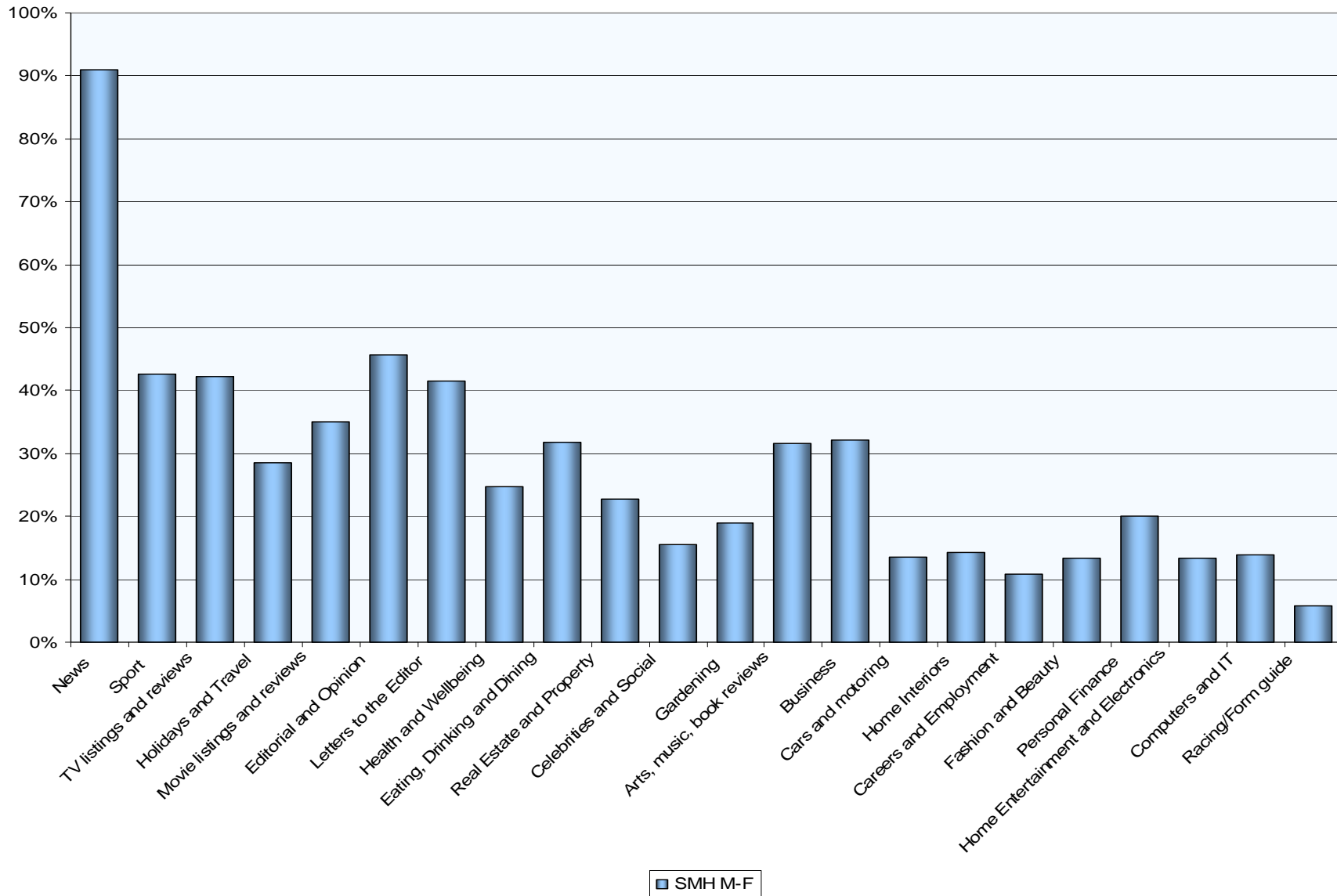




# Sunday Telegraph

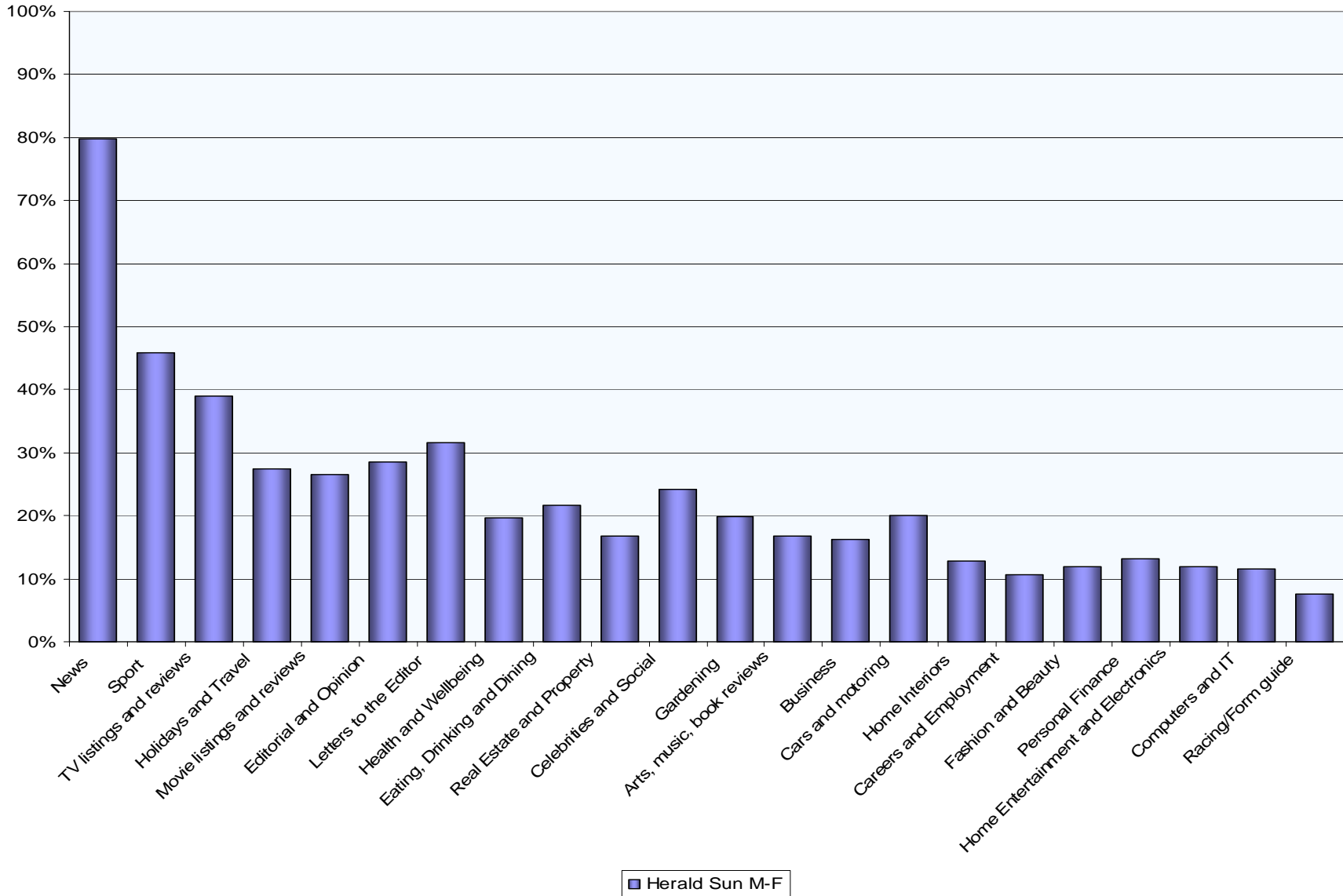
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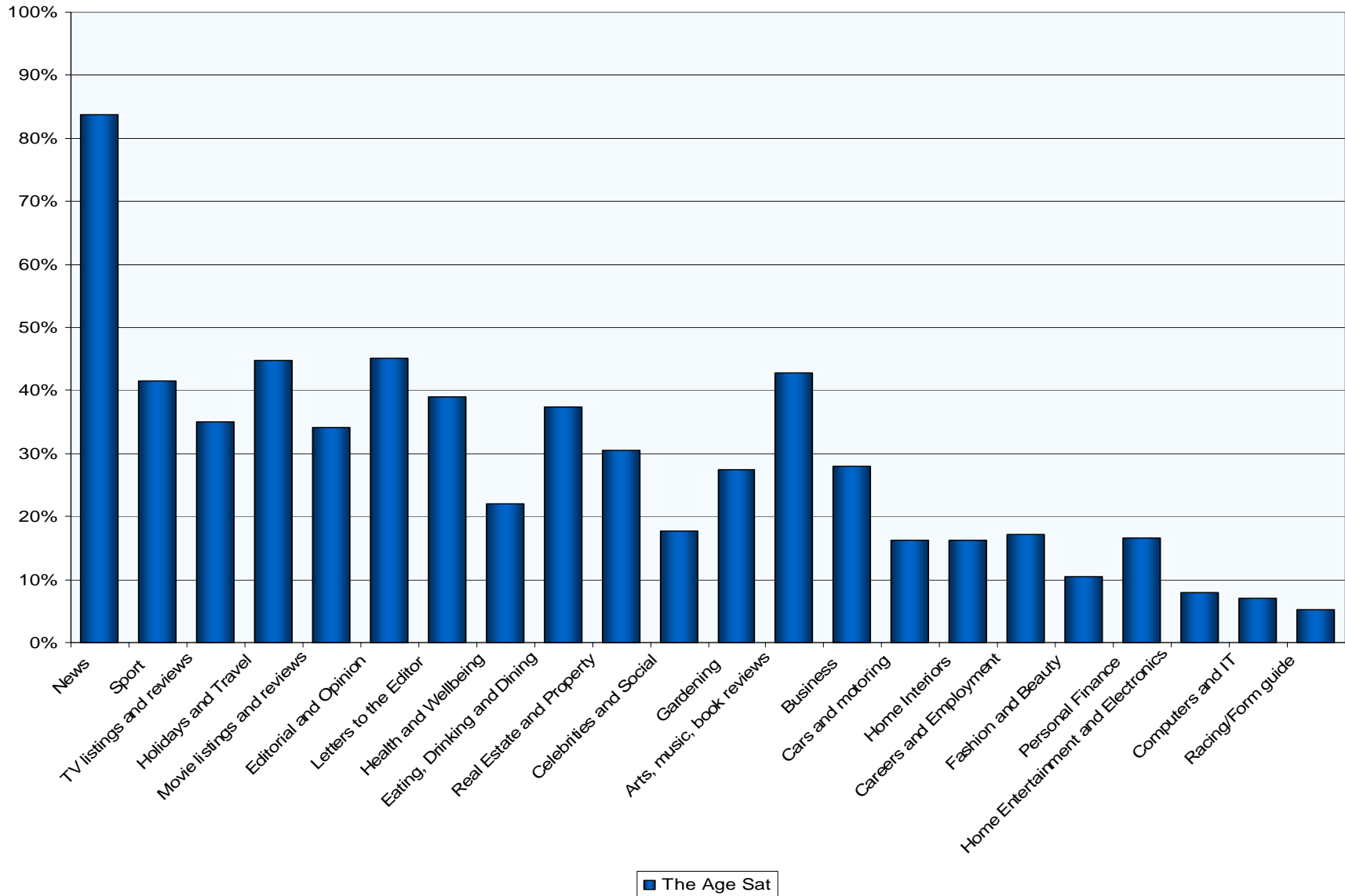




# Herald Sun M-F

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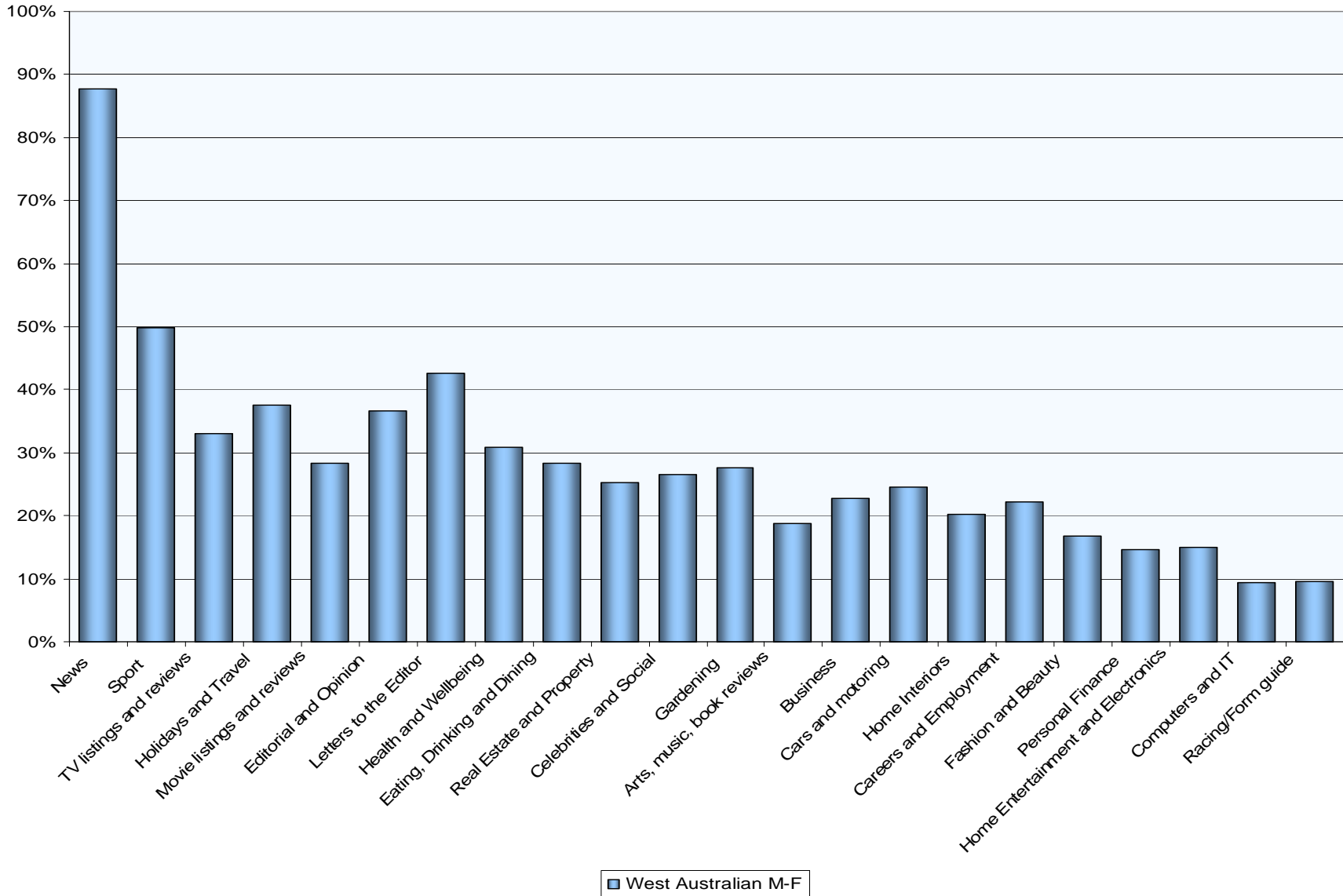




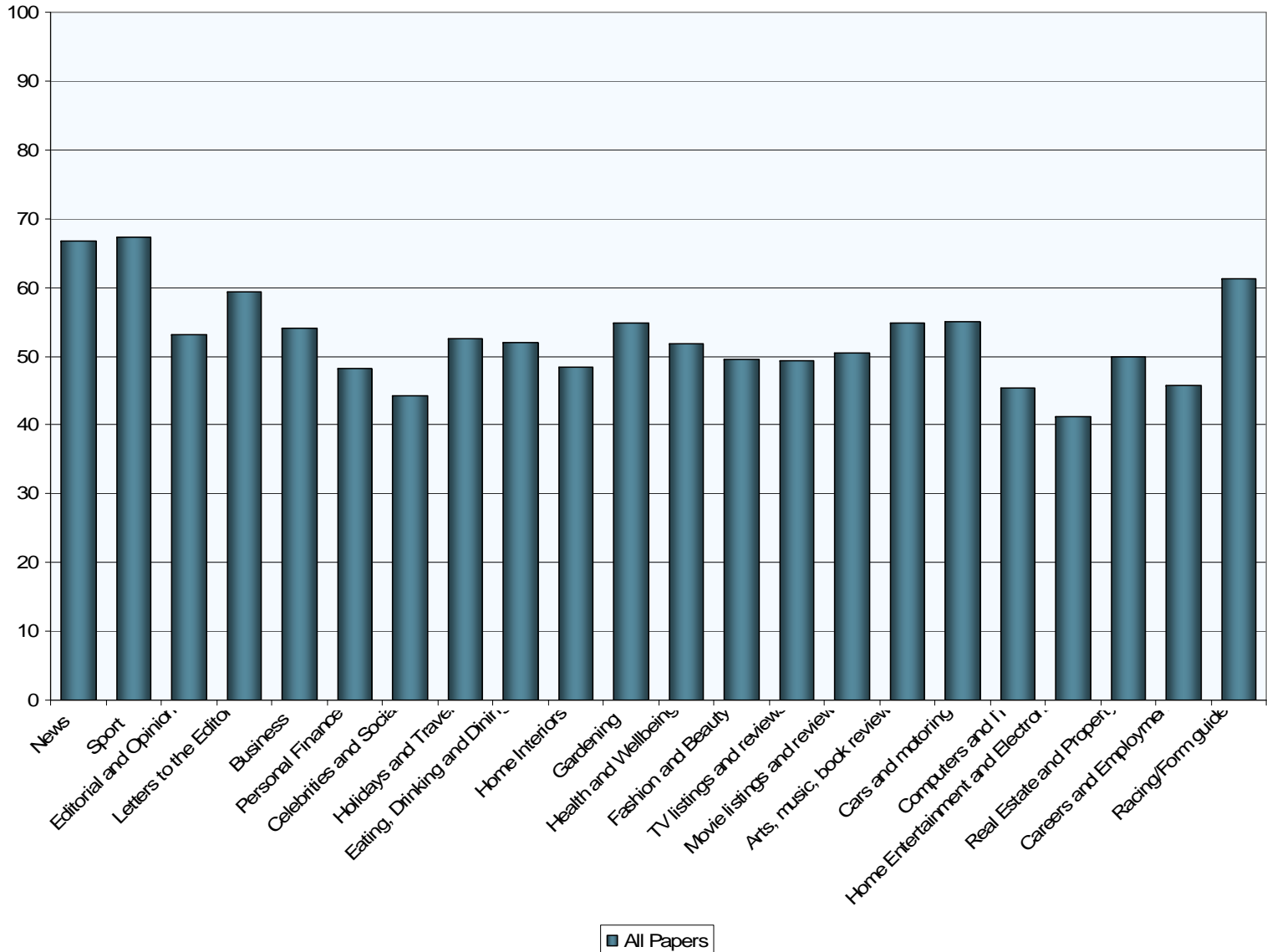


# West Australian M-F

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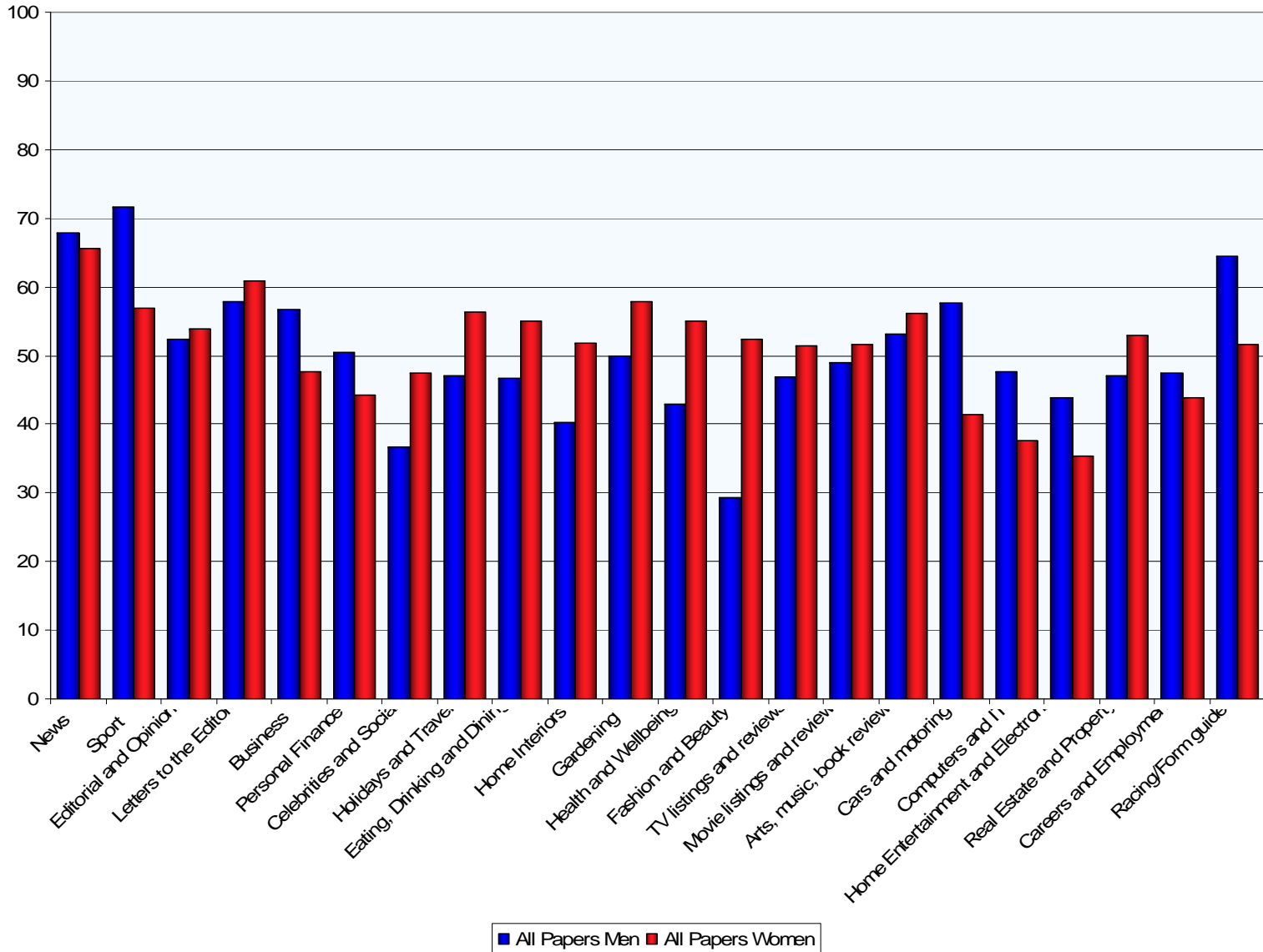


# Engagement Scores - all papers



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# Engagement Scores - Men vs Women



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# Courier Mail (Sat)

COURIER MAIL (SAT)							
		Sectional Reading	Especially choose to read	Interested and read when I have time	Only read if something grabs my attention	Really enjoy reading	Engagement Score
(unweighted)		13526	13526	13526	13526	13526	13526
(POPN '000)		18460	18460	18460	18460	18460	18460
		100%	100%	100%	100%	100%	100%
SUMMARY GRID - SECTIONAL READER ENGAGEMENT - COURIER-MAIL (SAT)							
	w c	v%	h%	h%	h%	h%	m
Total	800	100%					
News	704	88%	67%	23%	11%	49%	66
Sport	335	42%	65%	18%	16%	53%	67
Editorial and Opinion	271	34%	47%	32%	21%	30%	51
Letters to the Editor	297	37%	56%	29%	14%	39%	58
Business	187	23%	48%	31%	20%	26%	50
Personal Finance	133	17%	46%	33%	21%	27%	49
Celebrities and Social	169	21%	31%	47%	21%	21%	44
Holidays and Travel	330	41%	43%	36%	20%	38%	54
Eating, Drinking and Dining	208	26%	49%	33%	16%	35%	54
Home Interiors	133	17%	34%	37%	29%	26%	46
Gardening	192	24%	51%	27%	22%	35%	54
Health and Wellbeing	191	24%	40%	41%	19%	31%	51
Fashion and Beauty	117	15%	30%	48%	20%	23%	45
TV listings and review s	269	34%	51%	27%	21%	27%	49
Movie listings and review s	278	35%	43%	33%	23%	30%	50
Arts, music, book review s	200	25%	40%	43%	16%	31%	52
Cars and motoring	186	23%	50%	32%	16%	28%	52
Computers and IT	92	12%	38%	42%	19%	19%	45
Home Entertainment and Electronics	100	12%	28%	44%	24%	16%	39
Real Estate and Property	266	33%	41%	39%	15%	34%	52
Careers and Employment	245	31%	45%	33%	22%	18%	45
Racing/Form guide	81	10%	61%	19%	17%	45%	62
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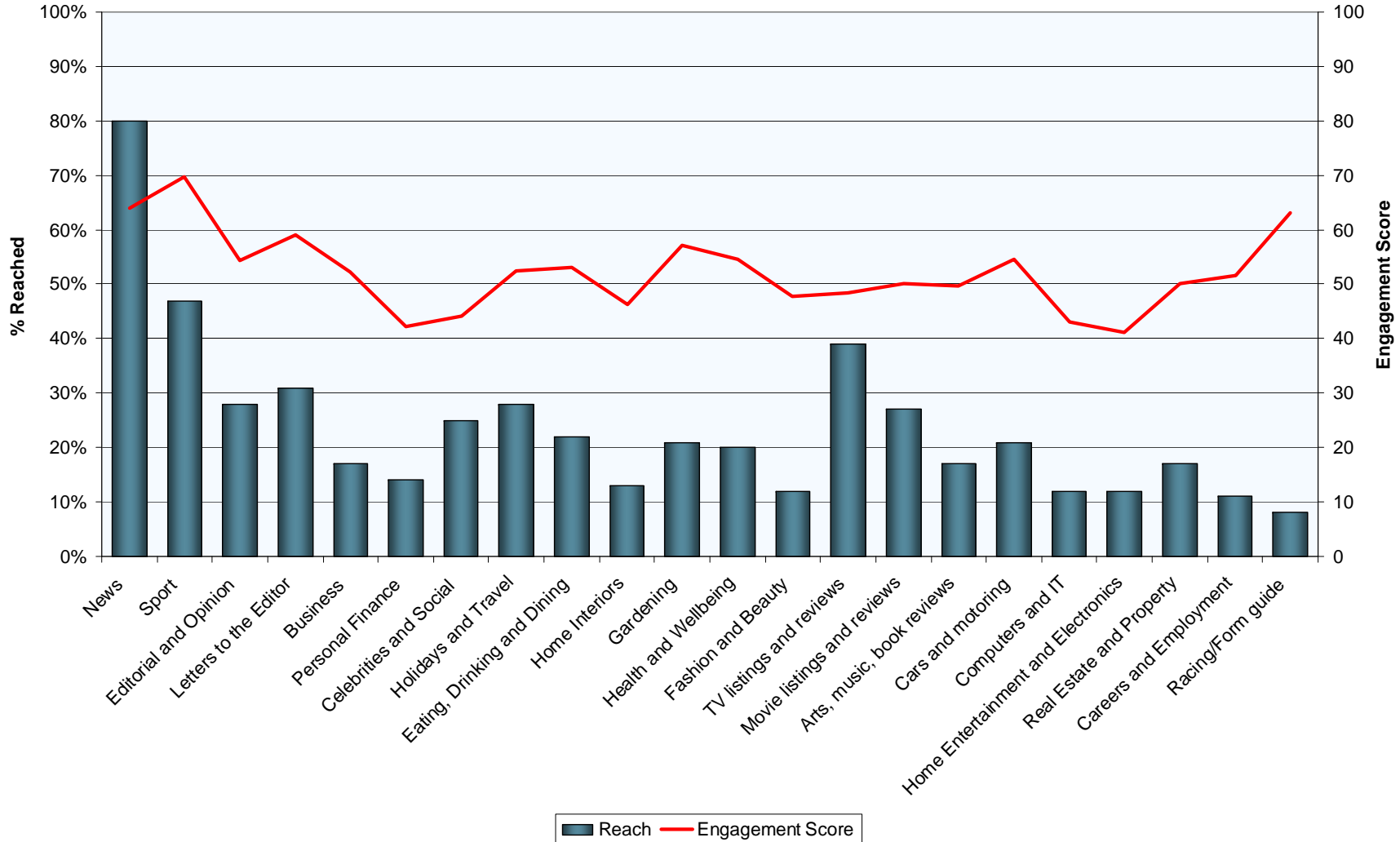
# Courier Mail (Sat)

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		COURIER MAIL (SAT)						
		Sectional Reading	Especially choose to read	Interested and read when I have time	Only read if something grabs my attention	Really enjoy reading	Engagement Score	
SUMMARY GRID - SECTIONAL READER ENGAGEMENT - COURIER-MAIL (SAT)		wc	v%	h%	h%	h%	h%	m
Total	800	100%						
<b>News</b>	<b>704</b>	<b>88%</b>	<b>67%</b>	<b>23%</b>	<b>11%</b>	<b>49%</b>	<b>66</b>	
<b>Sport</b>	<b>335</b>	<b>42%</b>	<b>65%</b>	<b>18%</b>	<b>16%</b>	<b>53%</b>	<b>67</b>	
<b>Editorial and Opinion</b>	<b>271</b>	<b>34%</b>	<b>47%</b>	<b>32%</b>	<b>21%</b>	<b>30%</b>	<b>51</b>	
<b>Letters to the Editor</b>	<b>297</b>	<b>37%</b>	<b>56%</b>	<b>29%</b>	<b>14%</b>	<b>39%</b>	<b>58</b>	
<b>Business</b>	<b>187</b>	<b>23%</b>	<b>48%</b>	<b>31%</b>	<b>20%</b>	<b>26%</b>	<b>50</b>	
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# Sectional Reading with Engagement Score – Herald Sun M-F

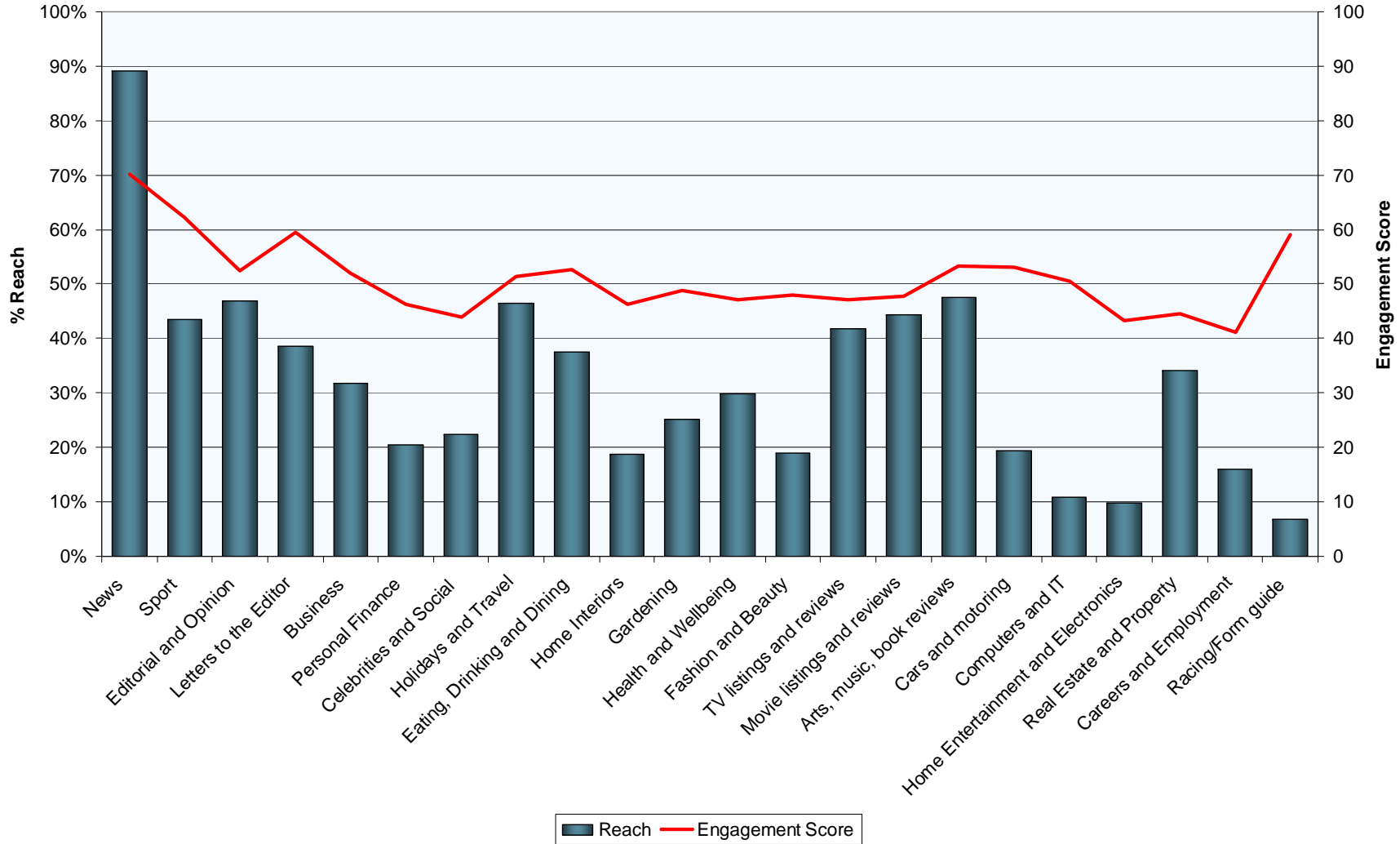
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# Sectional Reading with Engagement Score

## – SMH Sat

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## In summary

- We have only scratched the surface in what has been shown
- There are many, many facts, comparisons, insights and learnings to be had from exploring this new data
- Sectional Reading brings the opportunity to rejuvenate the understanding of newspapers' important role in the media marketplace
- We are proud to be releasing it to the market



# Sectional Reading applications in practice

George Pesutto

Roy Morgan Research  
401 Collins Street, Melbourne VIC 3000  
Telephone: (03) 9629 6888

## Australian newspapers show resilience

- Australian newspapers have performed better than their counterparts
- Newspaper have strength in segments and major demographic profiles

## 50+ affluent women increasing readers

**936,000 (94%) read  
newspapers  
+12% since 2006**

**829,000 (83%) did  
some activity online  
(ix 114)**

**Food Magazine  
readers increased by  
6% over 5 years.**



**891,000 magazine  
readers (+6%)**

**77% watch ABC  
(ix 147)**

**More likely to have  
watched pay TV**

## Why have newspapers maintained their importance and resilience?

- Newspapers continue to provide increasing value to consumers:
  - *Topical editorial environments*
  - *Dedicated journalism*
  - *Striking colour*
  - *Often stitched and trimmed*
  - *Improved stock*
  - *Ad hoc publications*
- All at negligible additional cost to consumers.

## The logic of advertising in sections

- Appropriate editorial environment
- Less clutter
- Reader mindset
- Environment relevance in integrated campaign

BUT

- *Readership?*
- *Accountability?*
- *Campaign performance expectations?*

## Today, the game changes

- With the addition of newspaper sectional reading,  
***newspaper readers are the most deeply understood audience of any main media***
- Assist clients to have the ***courage and confidence*** to build more of their campaigns around newspaper sections

## Finding your niche within newspapers

- Greater understanding of how papers are read
- Profiles of different parts of the paper/s
- How target markets act in newspapers
- Pitching the benefits of section audience

# Profiling Sectional Readers

Filter: N.S.W.

		TOTAL	AB Quintile	Big spenders	Gen X	Dog	TOTAL Fishing purposes	TOTAL business Platinum	Several times a week	House Cleaning	
(unweighted) uc		4515	939	1291	993	1607	517	336	127	432	
(POPN '000) wc		6299	1465	1972	1614	2400	818	549	147	494	
h%		100%	23%	31%	26%	38%	13%	9%	2%	8%	
SYDNEY MORNING HERALD (SAT) SECTIONAL READING (NSW)											
(Sat) wc		1072	465	492	274	379	126	149	45	339	184
h%		100%	43%	46%	26%	35%	12%	14%	4%	32%	17%
ib		=100%	=100%	=100%	=100%	=100%	=100%	=100%	=100%		
News - SMH Sat wc		954	422	446	245	336	103	137	40		
h%		100%	44%	47%	26%	35%	11%	14%	4%		
Sport - SMH Sat wc		463	195	228	123	165	62	81	18		
h%		100%	42%	49%	27%	36%	13%	17%	4%		
Editorial and Opinion - SMH Sat wc		493	228	223	112	159	53	79	18		
h%		100%	46%	45%	23%	32%	11%	16%	4%		
Letters to the Editor - SMH Sat wc		411	176	168	75	123	47	16	17	70	
h%		100%	43%	41%	18%	30%	11%	4%	17%	17%	
Business - SMH Sat wc		325	156	157	84	102	2	86	60		
h%		100%	48%	48%	26%	31%		26%	19%		
Personal Finance - SMH Sat wc		208	94	97	60	71	2	7	55	39	
h%		100%	45%	47%	29%	34%	13%	3%	26%	19%	

Business section readers are **42% more likely** to be **business air travellers** than the paper as a whole.

**66,000**  
**20%**

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Source: Roy Morgan Single Source Jul10 – Mar11



# Reinforcing and challenging intuition

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		TOTAL	Older Married Children HHI \$70k+	Visited friends/ relatives	Took a day trip in a car	Had a weekend away	Went to a historical house or building which is open to the public	I enjoy food from all over the world	If I see a new type of food I will try it	I like to go away on weekends
Eating, Drinking and Dining - CM M-F	wc	243	41	215	134	99	26	195	171	136
	h%	100%	16.8%	88.5%	55.0%	40.8%	10.8%	80.4%	70.2%	56.0%
	ix	100	145	102	123	134	130	115	130	126
Holidays and Travel - Sun Mail (Qld)	wc	<b>654</b>	<b>67</b>	<b>568</b>	<b>338</b>	<b>252</b>	<b>63</b>	<b>472</b>	<b>384</b>	<b>349</b>
	h%	100%	10.3%	86.8%	51.7%	38.5%	9.7%	72.2%	58.8%	53.4%
	ix	<b>100</b>	<b>103</b>	<b>102</b>	<b>122</b>	<b>123</b>	<b>141</b>	<b>111</b>	<b>110</b>	<b>121</b>
Health and Wellbeing - Sun Mail (Qld)	wc	463	42	408	240	171	50	333	272	245
	h%	100%	9.0%	88.0%	51.7%	37.0%	10.8%	71.9%	58.7%	52.9%
	ix	100	90	104	122	118	157	111	110	120
Arts, music, book reviews - Sun Mail (Qld)	wc	302	34	263	153	103	26	227	186	142
	h%	100%	11.1%	87.0%	50.6%	34.0%	8.4%	75.1%	61.5%	46.9%
	ix	100	111	102	119	109	122	116	115	106

## Engagement Scores – Another consideration

Target: Main Grocery Buyer	Eating Drinking and Dining Herald Sun - Sat	Eating Drinking and Dining The Age - Sat
Reach	233,000	218,000
Index	<b>114</b>	<b>110</b>
Engagement Score	<b>58</b>	<b>53</b>

## Engagement Scores – Another consideration

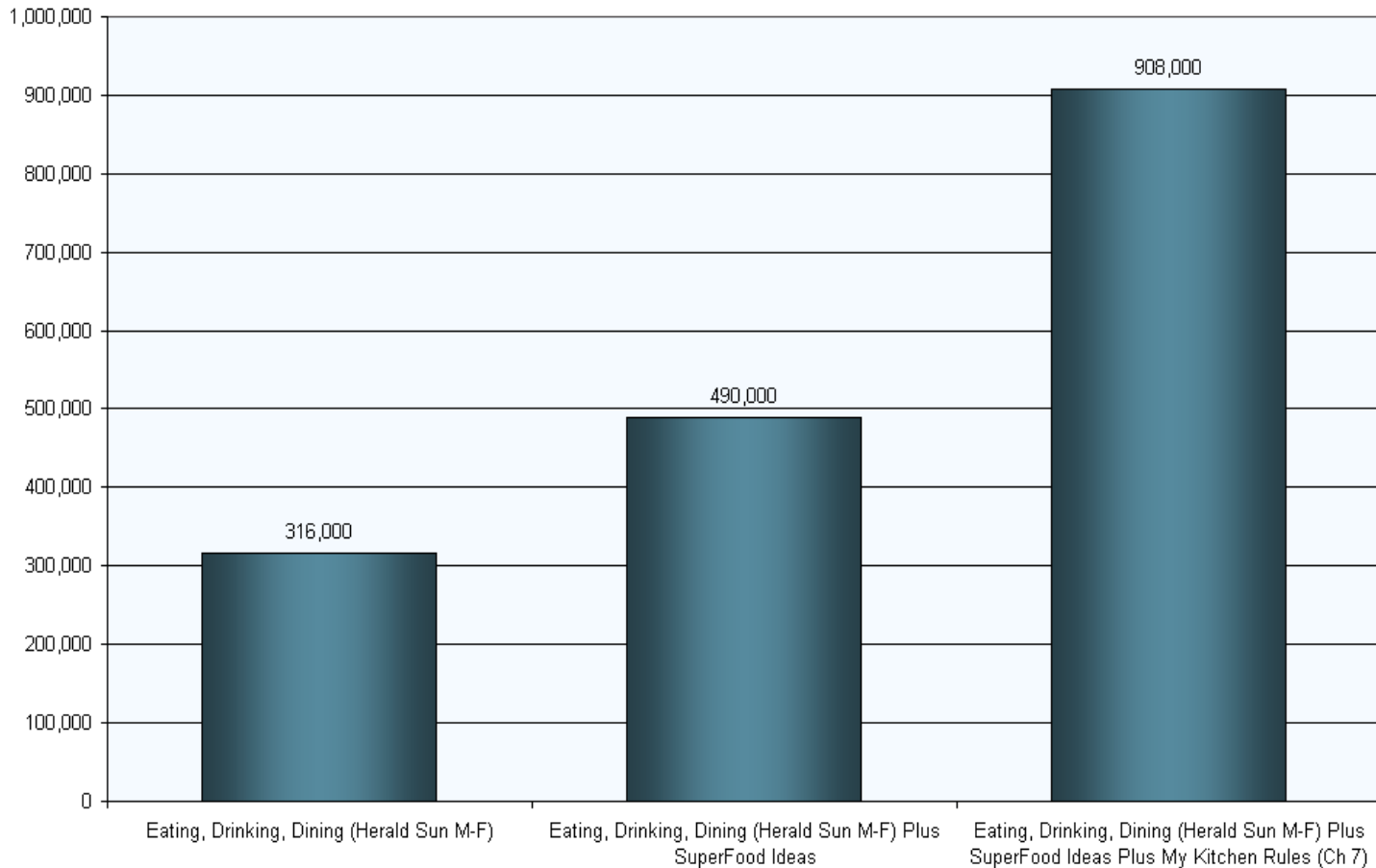
Target: Women 35-49	Health & Wellbeing Sunday Telegraph	Health & Wellbeing Sun Herald
Reach	113,000 (14%)	74,000 (9.2%)
Index	168	168
Engagement Score	48	58

# Profile newspaper sections, magazines & television

		Eating, Drinking and Dining - Hld		
		Sun M-F	Super Food Ideas	7: My Kitchen Rules
<b>Women</b>	wc	190	169	317
	ix	118	158	124
<b>25-34 years</b>	wc	58	29	154
	ix	94	71	157
<b>Degree</b>	wc	93	36	178
	ix	93	53	111
<b>AB Quintile</b>	wc	85	34	118
	ix	114	69	100
<b>Big spenders</b>	wc	145	78	176
	ix	127	103	96
<b>Entertainer (food segments)</b>	wc	51	24	64
	ix	124	88	98
<b>If I see a new type of food I will try it</b>	wc	181	128	272
	ix	107	113	101
<b>People often compliment me on my cooking</b>	wc	193	127	275
	ix	128	126	114
<b>Entertained friends/relatives</b>	wc	226	147	351
	ix	108	106	105
<b>Held a dinner party</b>	wc	96	63	220
	ix	113	111	162
<b>Main Grocery Buyer</b>	wc	228	153	431
	ix	118	118	139
<b>\$200+ pw supermarket spend</b>	wc	89	51	182
	ix	146	125	186
<b>Conventional Family Life</b>	wc	55	27	101
	ix	160	120	184
<b>Something Better</b>	wc	19	9	50
	ix	98	71	163

# Multi-media reach across newspaper sections, magazines and television

	Reach
Eating, Drinking, Dining (Herald Sun M-F)	316,000
SuperFood Ideas	211,000
My Kitchen Rules (Ch 7)	506,000



**Filter: Melbourne**

## A more critical role for newspapers

- Newspaper audiences are much more deeply understood than ever before
- Sophisticated marketing campaigns can quantify the role sections
- Sections can play a more critical role in integrated campaigns
- Sophisticated marketers can more tactically involve newspapers
- Publishers can demonstrate the true value topical environments play
- Publishers can build client confidence in performance expectations

## It's time!

- With the new sectional reading and engagement data newspaper readers are now the most deeply understood audience of any main media
- Newspaper sections can now take their rightful place in integrated marketing campaigns
- Once a newspaper is conceived of as a series of sections it becomes a repertoire of opportunities to communicate rather than just one

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