

Roy Morgan  
Research

# SECTIONAL READING AND ENGAGEMENT

New newspaper readership measures  
from Roy Morgan Research

MAY 2011

*Discover your edge*

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## **ROY MORGAN LAUNCHES SECTIONAL READERSHIP MEASURE**

**Michele Levine, CEO Roy Morgan Research, May 31 & June 1, 2011**

**On May 31 2011, Roy Morgan launched an exciting new readership measure for publishers, agencies and advertisers – the Roy Morgan Sectional Readership measure – which for the first time provides detailed and intimate knowledge of exactly what parts of the Newspaper are actually read – and by whom – and how engaged the readers are with each newspaper section.**

Newspapers in Australia are in a substantially better position than in the United States or any other country – and we believe the relative success of newspapers is at least in part due to the Roy Morgan measurement system that enables Australian newspapers to demonstrate their power as a channel to consumers.

With the new Roy Morgan 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.
- Newspapers can now be conceived of as a series of sections – so newspaper sections can now be used as a repertoire of opportunities to communicate rather than just one.

### **The 22 Sections covered by Sectional Readership**

The sectional reading measurement tracks 22 newspaper sections/topics including:

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

One way of understanding the different section audiences is to look at the relative proportions of men versus women for each section as the table on page 19 shows.

The top five sections by proportion of **Women** readers are:

1. *Fashion & Beauty*
2. *Health & Wellbeing*
3. *Home Interiors*
4. *Celebrities & Social*
5. *Eating, Drinking & Dining*

The top five sections by proportion of **Men** readers are:

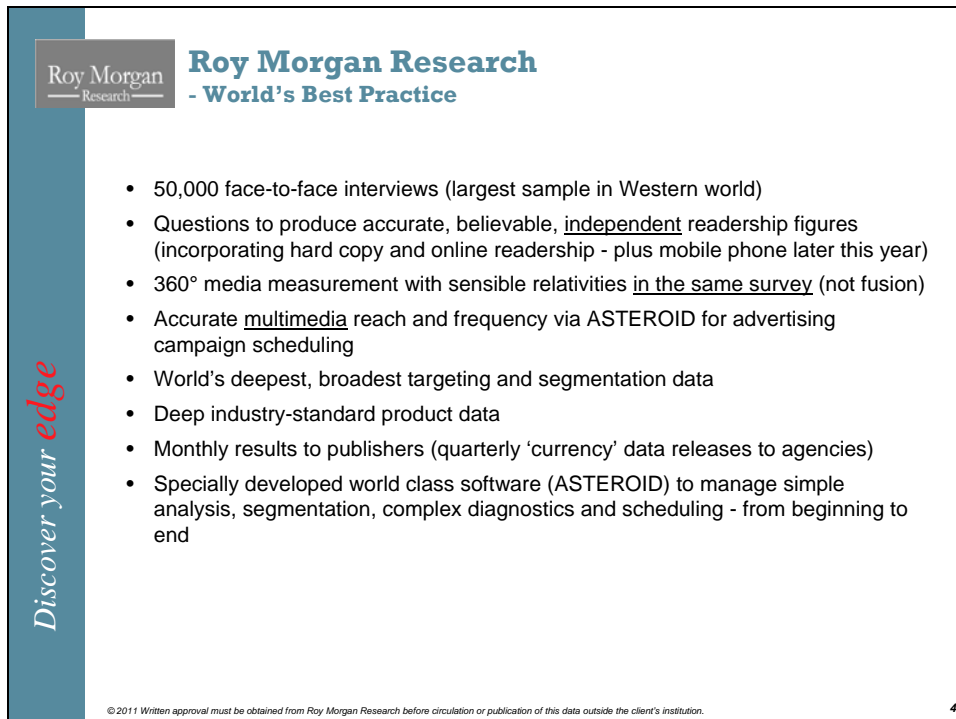
1. *Cars & Motoring*
2. *Computers & IT*
3. *Racing/ Form guide*
4. *Business*
5. *Home Entertainment & Electronics*

This report is the culmination of many years of work:

- Newspapers in Australia today are in a substantially better position than in the US or any other country;
- Our readership survey has stood the test of time;
- We have finally reached industry accord on sectional readership;

We are proud that Australian Print Readership measurement is world class, and believe the relative success of newspapers is at least in part due to measurement systems that enable them to demonstrate their power as a channel to consumers.

Nowhere else in the world has a readership survey achieved multiple industry (finance, tourism, automotive, etc) currency status.



The slide features a blue vertical bar on the left with the text "Discover your edge" written vertically. The main content area is white with a blue header containing the Roy Morgan Research logo and the text "Roy Morgan Research - World's Best Practice". A bulleted list of eight points is centered on the slide. At the bottom, there is a small copyright notice and a page number "4".

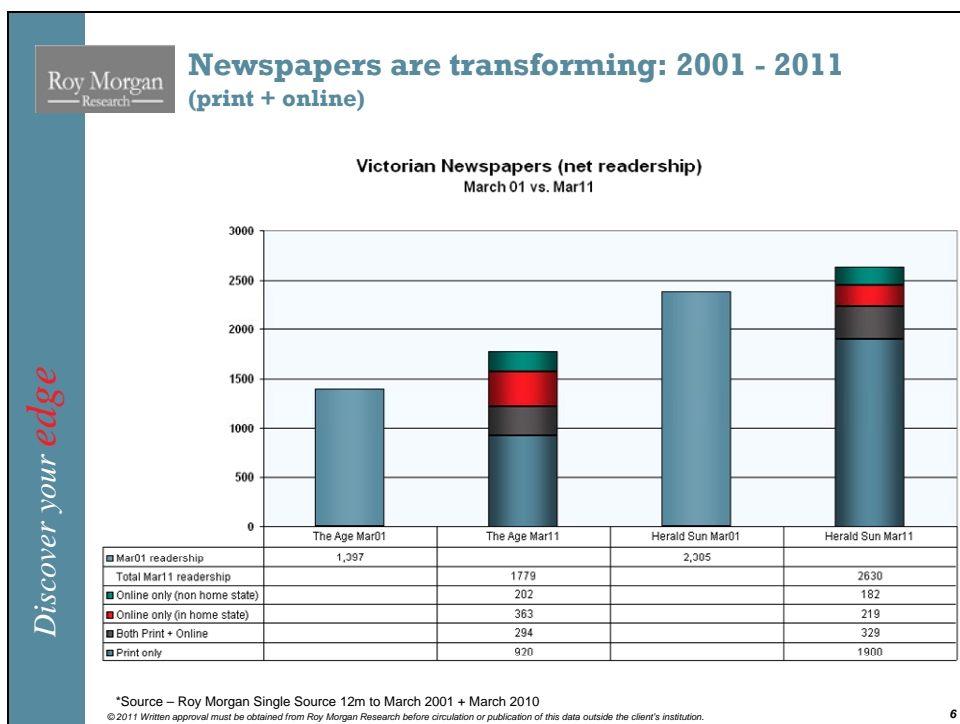
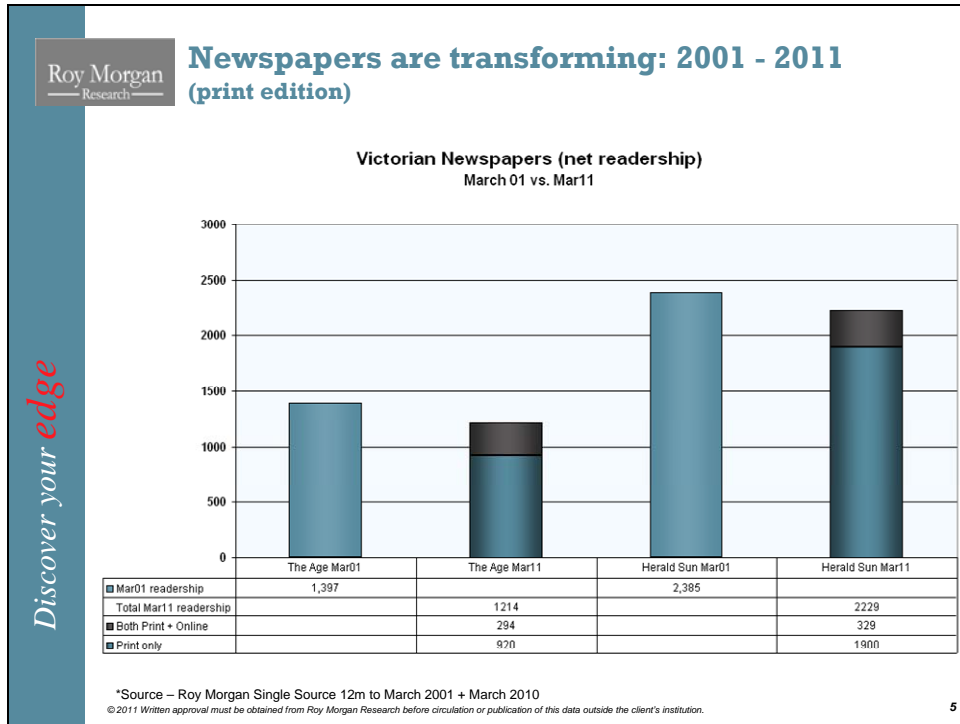
**Roy Morgan Research**  
- World's Best Practice

- 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

© 2011 Written approval must be obtained from Roy Morgan Research before circulation or publication of this data outside the client's institution.

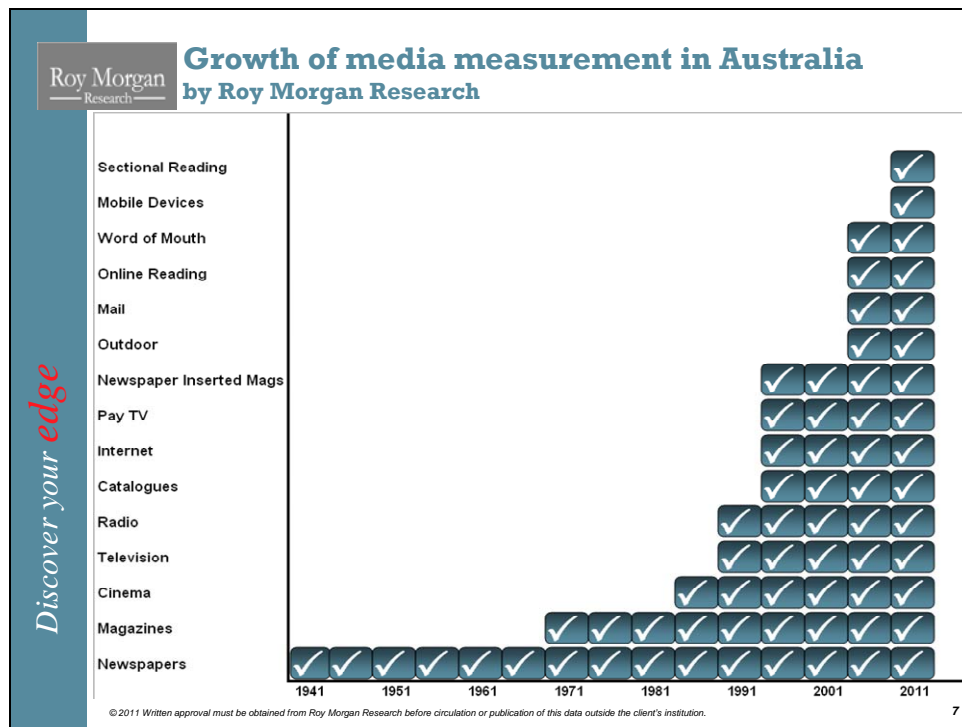
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Yet world class must continue to evolve. Newspapers are transforming. Comparing net readership of readership ten years ago with today shows fewer readers of hard copy, or printed edition of newspapers. However, if online reading and out of area reading is included, there are more readers today than ten years ago.

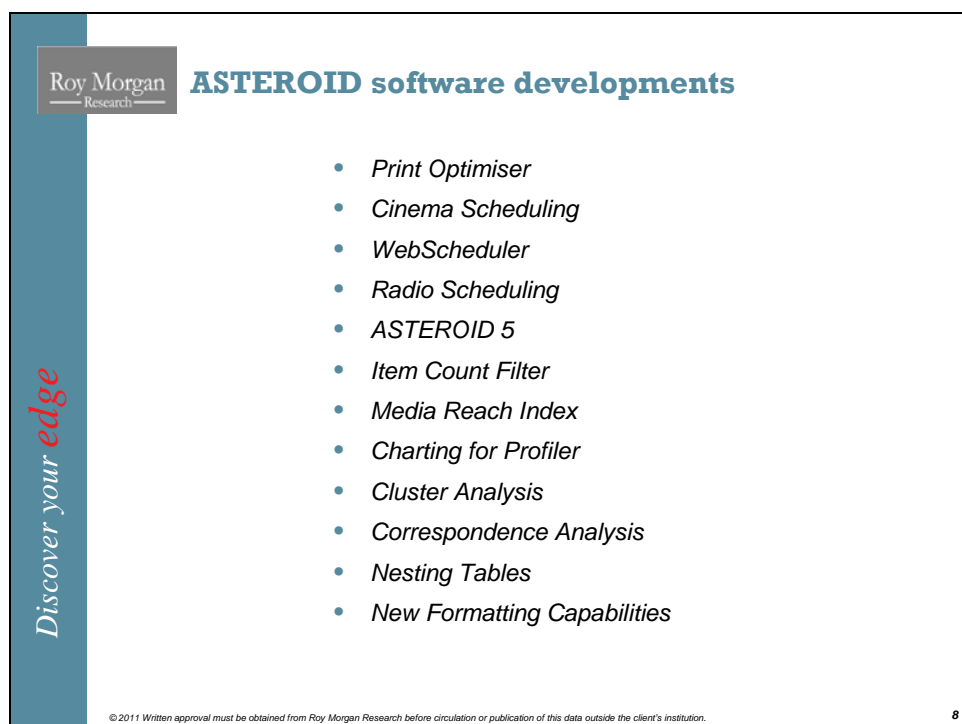


Newspapers truly are transforming – and so must our measurement currency. The Roy Morgan Readership Survey is a story of evolution.

The data collected continues to evolve.



The software continues to evolve.



And the methodology evolves, with the move to CAPI ( Computer Assisted Personal Interviewing) providing the quality and accuracy of face-to-face interviewing and speed.

The evolution continues. Coming soon – fully integrated with Roy Morgan Single Source – we have:

- WAM – truly hybrid website audience measure
- B2B – Business to Business survey
- Magazine ‘Quality of Reading’ engagement measures
- Digital TV measures
- Mobile advertising
- Downloading apps

Sectional readership has been the culmination of many years work. Without 'looking back' too much, let us just say that sectional readership has been more difficult and political than the GST or internet access in China. John Hewson lost an election over GST, but it had to be done. Maybe one day we will see an open China but today we have newspaper sectional readership.

In 2004 we published ‘It’s Time’. This paper co-authored by Greg Hywood (now CEO of Fairfax) and William Burlace ( Roy Morgan Director, Media Services) recommended publishers seize the opportunity to measure sections and be ahead of the game.

Greg Hywood saw early on the power that would be unleashed by sectional data; but for various reasons the time wasn’t right – it wasn’t time. We are now delighted that after some two years working with the industry the time finally is right.

Since 2009, following a meeting with the MFA which called for a tripartite approach to the evolution of media measurement we have had a series of meetings of the Readership Research Forum – agencies, publishers and researchers.

One of the key areas of consultation was the measurement of newspaper sections or topics – another was engagement. Senior agency people as well as publishers have put in substantial work to give suggestions and feedback on concepts and to trial beta versions of the databases and provide valuable feedback and practical suggestions.

We believe that a detailed understanding of sectional reading has created a raft of opportunities for publishers, and those who want to communicate with newspaper audiences. It is finally 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.

Thanks go especially to all who have worked with us to create and shape this important media initiative.

## **SECTIONAL READING AND ENGAGEMENT**

### **New readership measures from Roy Morgan Research**

#### **Calls for more data on newspaper reading**

There have been consistent calls over the years for the ability to look in more depth at the readership of individual components of newspapers – on the basis that greater engagement with a section or topic will produce a preferred environment for advertisements and thus a different quality of response from prospects.

The major call from media agencies has been for measures of the audiences of different sections or topics in specific newspapers – what is commonly known as ‘sectional reading’.

Sectional reading allows publishers, agencies and advertisers to understand the different audiences that read specific sections or topics of interest in the newspaper. It permits the profiling of those audiences and offers the ability to uncover areas of overlooked value.

Newspapers cover a wide range of matters of interest, so different parts of the paper appeal to different target audiences. Sectional reading can be looked at from the point of view of the audience for a given section or the sections read by a given target audience.

This kind of inside knowledge, previously unquantified, is now available in Australia using the well respected Roy Morgan Single Source database.

#### **New data from Roy Morgan**

In bringing new data to market, Roy Morgan is providing not just audience measures of newspaper sectional readers but also degrees of engagement which measures how much involvement there is in the section or topic read and whether it is really enjoyed.

This measure is for all the major metro dailies, by individual newspaper masthead, using a common framework of 22 different sections or topics.

Roy Morgan’s two new measures are:

- 1. Sectional Reading (topic by masthead)**
- 2. Sectional Reader Engagement**

These extend an existing measure (launched in 2009):

- 3. Newspaper Topic Involvement and Enjoyment**

## The 22 sections/topics

- News
- Sport
- Editorial and Opinion
- Letters to the Editor
- Business
- Personal Finance
- Celebrities and Social
- Holidays and Travel
- Eating, Drinking and Dining
- Home Interiors
- Gardening
- Health and Wellbeing
- Fashion and Beauty
- TV listings and reviews
- Movie listings and reviews
- Art, music, book reviews
- Cars and motoring
- Computers and IT
- Home Entertainment and Electronics
- Real Estate and Property
- Careers and Employment
- Racing/Form Guide

## Three ways of mining the depth of newspapers

### 1. Newspaper Topic Involvement and Enjoyment (EXISTING)

*A way of quantifying the degree to which readers are interested in and involved with different topics/sections found in newspapers, generally.*

First released in late 2009, this provides the following measure of degree of involvement with newspaper topics/sections *in general* (i.e. not to individual newspapers by masthead):

*Degree of involvement:*

- ‘Especially choose to read this topic/section’
- ‘Interested and read when have time’
- ‘Only read if something grabs attention’
- ‘Never read this topic/section’

And additionally

*Enjoyment measure:*

- ‘Really enjoy this topic/section’

Example: 4.37 million people, or 24% of Australians, especially choose to read Sport in newspapers; 2.529 million (14%) especially choose to read Editorial & Opinion with a further 2.326 million (13%) being interested and reading Editorial & Opinion when they have time.<sup>1</sup>

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<sup>1</sup> All examples are from Roy Morgan Sectional Reading July 2010-March 2011, n = 13,526 Australians 14+



## 2. Sectional Reading (topic by masthead) (NEW)

*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.

Example: 524,000 or 28% of readers of the Herald Sun (Mon-Fri) read the Holidays & Travel section/topic; 30% or 325,000 readers of the Sydney Morning Herald (Sat) read the Business section/topic.

## 3. Sectional Reader Engagement (NEW)

*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.*

Reader engagement builds on the two measures above, providing involvement and enjoyment measures for each section/topic by individual masthead.

Further, combining involvement and enjoyment produces an engagement score for the readers of any particular section/topic in a given newspaper.

Each respondent is allocated a score out of 100 based on their answers, i.e. lowest scores for 'Only read if something grabs my attention' and highest scores for 'Especially choose to read *and* really enjoy this topic/section'. Importantly, this is a score for readers of the section/topic - thus well-read sections may have low engagement and sections with low readership may have high engagement.

Example A: 223,000 or 61% of readers of the Letters to the Editor section/topic in the Weekend Australian especially choose to read that section/topic in the Weekend Australian – a further 27% or 100,000 are interested and read when they have time.

Example B: Readership of the Racing/Form Guide topic/section in the Saturday Daily Telegraph, is less than half that of Movie Listings and Reviews, yet it has a higher Engagement Score (62 versus 49) - meaning the level of interest and commitment of Racing/Form Guide readers to that section/topic is stronger<sup>2</sup>.

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<sup>2</sup> The assumption is that stronger commitment to a section/topic will reflect greater interest in advertising for products and services of the same nature placed within or adjacent to the specific topic/section.

## Positive responses from trials of Sectional Reading data by media agencies

*“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.”*

*“Thanks for the update on engagement - sounds really positive!”*

*“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.”*

*“It will provide more surety for dollars spent outside of early general news (EGN) and into sections, which is a good thing for publishers as sectional space, the historical poor cousin of EGN inventory, will now have data to increase its value.”*

*“The data in this guise, with cross title comparison, is very good, and [I] have learnt to date, this is the best way to look at it.”*

*“We have been wanting this for a long time, so it's good to be able to access this info now.”*

*“It all seems to make sense – no big surprises really.”*

*“OK, I have had a very good play around with this and it is very impressive ... this is terrific.”*

## Detail and Discussion

### SECTIONAL READING OF NEWSPAPERS

Roy Morgan Research has many years experience in the measurement of the reading of sections and topics in newspapers. This has ranged from gathering readership of specific named sections by title to that of collecting more generic topic involvement measures.

With the March 2011 release of Roy Morgan Single Source, subscribers to Roy Morgan Readership will be provided with a separate 9 months database of Sectional Reading, i.e. the usual reading of 22 named sections/topics in individual newspapers. With the following June 2011 data release (i.e. with 12 months of data), this will be fully integrated into the normal Single Source database.

This is the first public release in Australia of independent, comprehensive sectional reading data.

#### Roy Morgan Sectional Reading

Under the banner of *Sectional Reading*, we ask:

*Q: Which sections or topics in the following newspapers do you usually read or look into?*

22 sections/topics (plus 'Other') are then listed for the major metro daily newspapers in each state plus the two nationals (i.e. **Australian, Australian Financial Review, Daily Telegraph, Sydney Morning Herald, Herald Sun, Age, Courier Mail, Advertiser, West Australian and Sunday Times**) in their Monday-Friday, Saturday and/or Sunday editions:

The 22 topics/sections are:

- *News*
- *Sport*
- *Editorial and Opinion*
- *Letters to the Editor*
- *Business*
- *Personal Finance*
- *Celebrities and Social*
- *Holidays and Travel*
- *Eating, Drinking and Dining*
- *Home Interiors*
- *Gardening*
- *Health and Wellbeing*
- *Fashion and Beauty*
- *TV listings and reviews*
- *Movie listings and reviews*
- *Art, music, book reviews*
- *Cars and motoring*
- *Computers and IT*
- *Home Entertainment and Electronics*
- *Real Estate and Property*
- *Careers and Employment*
- *Racing/Form Guide*

These 22 sections/topics were arrived at in consultation with the major newspaper publishers.

Newspapers cover a wide range of matters of interest, so different parts of the paper appeal to different target audiences. Sectional reading enables publishers, agencies and advertisers to understand the different audiences that read specific sections or topics of interest in the newspaper. It permits the profiling of those audiences and offers the ability to uncover areas of overlooked value.

### **Considerations in measuring sectional reading of newspapers**

Newspaper inserted magazines – the most well defined and branded ‘sections’ of a newspaper – have long been measured by Roy Morgan Research as stand-alone magazines. Respondents are aided by the brand name (e.g. *Good Weekend*) for weeklies and the front cover image for monthlies. Separate measurement has been shown to be important because some inserted magazine readers do not read the rest of the newspaper. Also newspaper inserted magazines are clearly branded and generally fairly stable.

Using the same method for newspaper sections raises several practical problems. The ‘ideal’ measure of sectional reading could be seen as where the brand name of the actual section is used, asked in the context of the actual paper on the appropriate day of the week, for example, the *Green Guide* in the *Thursday Age*.

The main problem with this approach is that it relies on respondents’ familiarity with the brand name - which varies in several respects. Our experience is that newspaper section brand names are not necessarily well established in the minds of all readers and consequently survey respondents can find it difficult to correctly recall their readership of those sections.

We must remember that readers of newspapers vary in their levels of commitment, familiarity and regularity of reading. The content of sections changes, brand names change and respondent familiarity with either of these varies, depending on whether the respondent is a regular or irregular reader and the extent to which the section is personally relevant or important.

Furthermore, to measure each section of each newspaper by a different name necessitates a very lengthy and detailed question with a fairly exhaustive list of options. This is more expensive and much more complicated to administer, in particular ensuring that it is current.

Because these types of sectional reading measures are complex and expensive to conduct, relying on respondents’ familiarity with the specific identity of the section, they are often done as a snapshot at a point in time, rather than as a continuous measure.

## The Roy Morgan approach

Roy Morgan Research has developed a method which overcomes the above shortcomings.

This method:

- uses self-completion methodology (to facilitate deliberation and consideration)
- concentrates on topics or content areas of interest (which may or may not precisely coincide with sections but will be clear to all – even the casual reader)
- provides a consistent framework for evaluation across mastheads and states – a level playing field, in a language that respondents understand
- is continuous (so that trends can be established and reviewed)
- is integrated with the continuous Roy Morgan Single Source information, linked to detailed consumer data, e.g. buyers, switchers, intenders, etc

Results are provided separately for

- Monday-Friday,
- Saturday, and
- Sunday editions.

We don't ask about sectional reading for each individual weekday (Monday, Tuesday, etc) but rather 'Monday to Friday'. The former requires from survey respondents an unlikely level of familiarity with the newspapers they read (which can be multiple issues) in order to know on which particular days different sections appear. This variable familiarity among respondents is likely to compromise the resulting material with regard to accuracy.

## Sectional reading and average issue readership currency

It is important to note that sectional reading is different from the readership currency. The readership currency questions ask respondents about their actual reading of newspaper titles by specific day for the last 7 days.

The sectional reading question asks respondents about the topics that they *usually* read when they read a particular newspaper. This does not mean that the respondent is a usual reader of a particular newspaper but rather tells us what sections/topics they usually read *when* they read the particular newspaper. They may be an irregular reader, may not have 'read in the last 7 days', yet be clear as to their reading habits and relationship with the particular paper in question.

Last 7 days readership is, therefore, a tighter definition of readership than that of usual sectional/topic readership. The latter includes responses from a much larger pool of newspaper readers, a number of whom are more casual, i.e. less regular or consistent, newspaper readers.

In consideration of the differences between the two measures, we concluded that the best marketplace measure of sectional reading combines the two.

All Roy Morgan sectional reading data for specific mastheads is thus reported *only* among respondents who are readers in the last 7 days. We believe this provides the most consistent and accurate estimate of sectional/topic reading.

(Note: this does not apply to the more general Newspaper Topic Involvement data.)

For Monday to Friday newspapers the incidence of sectional/topic reading is reported as a percentage of the *net* Monday-Friday readership.<sup>3</sup>

## Sections and topics

For Monday-Friday newspapers the results of sections/topics read should not be interpreted as the exact incidence of readership of a particular named section. This is because we are asking about reading of sections/topics across the entire week. For instance, *Eating, Drinking and Dining* topics across the week for the **Sydney Morning Herald** is not the same as the *Good Living* section in Tuesday's edition since other days' editions may also include this topic.

In effect results for *Good Living* are incorporated into results that cover the week. Nevertheless a profile of the types of people reading about *Eating, Drinking and Dining* in the weekday **Sydney Morning Herald** will be a very good guide to understanding the types of people reading *Good Living*.

It should also be noted that a particular section of a newspaper may incorporate information across more than one of our particular topics. For instance, while *Body & Soul* as a newspaper section primarily includes information that could be categorised as *Health and Wellbeing* it is not necessarily limited to this subject matter only.

Sectional/topic reading data can also show readership for a particular section on Monday-Friday, Saturday or Sunday when there is no specific newspaper section that day. Again we need to be mindful that respondents are answering about whether they usually read the topic. Even when there is not a specific section that particular topic may be covered in the newspaper.

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<sup>3</sup> The *net* M-F readership is the sum of all readers of any edition from Monday to Friday. Each distinct reader counts as one. The M-F average issue readership counts a reader on three of the five days as 0.6 of a reader, a reader on four days as 0.8, etc. Net readership is generally around one third higher than average issue readership.

## WHAT THE DATA SHOWS

The following is a summary of some key findings about sectional/topic reading. It includes overall reading incidence for the various newspaper sections generally, incidence levels for the major metro dailies, individually, some sectional engagement examples, as well as some ways the data can be used to more efficiently reach various demographic categories using newspapers.

### Sectional Reading – all newspapers combined

*Note: The reading of the AFR is quite different from that of all other newspapers because of the nature of its content which has a specific business/finance emphasis. Therefore, when showing general results for ‘All Newspapers’ we have excluded the AFR so as to present a summary that is more reflective of newspapers generally. Results for the AFR are shown in the section covering results for individual titles.*

After the topic of *News, TV listings and reviews* is the next most read part of the newspaper across the whole week, with 48% of people saying they usually read this topic. The next most popular topics are *Sport* (45%) and *Holidays & Travel* (44%).<sup>4</sup>

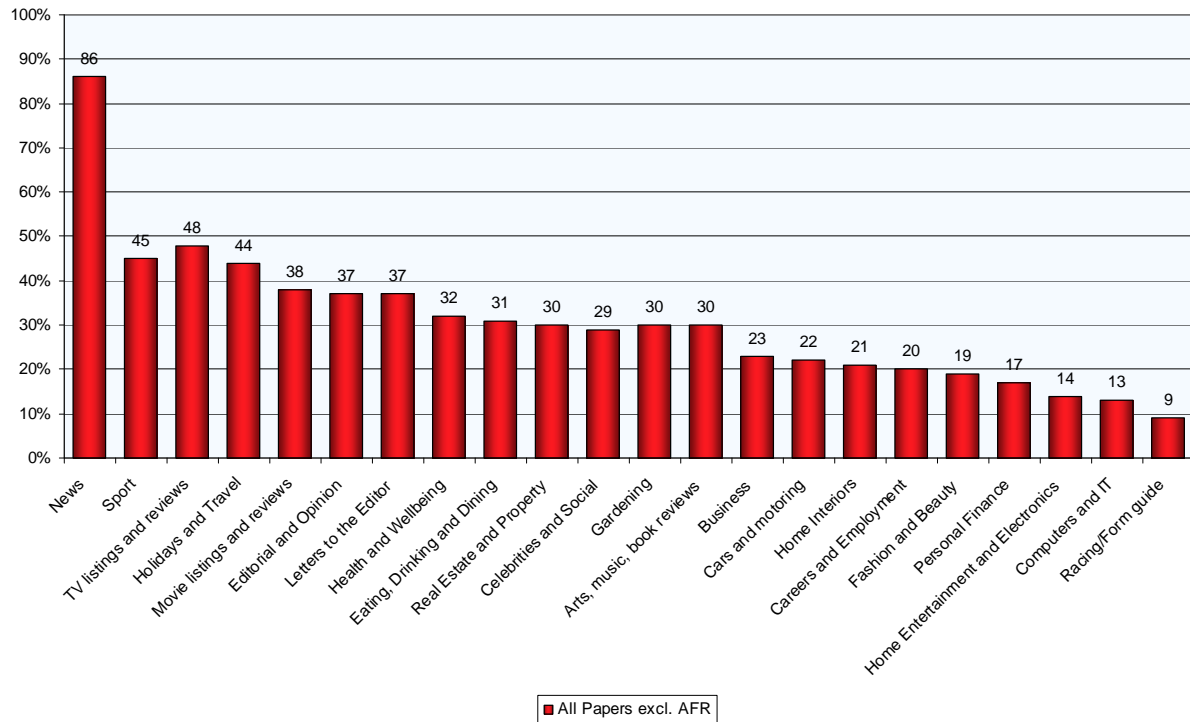
*Movie listings & reviews, Editorial & Opinion and Letters to the Editor* range from 37-38%. *Health & Wellbeing, Eating, Drinking & Dining, Real Estate & Property, Gardening* and *Arts, music, book reviews* are next highest in the range of 30-32%.

Clearly, these numbers vary when we look at individual papers, papers by day of week (M-F, Sat, Sun), by age, by sex, by target audience, etc.

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<sup>4</sup> In one of those interesting little ironies it will be seen in the following charts for all papers combined that Sport has a higher proportion of readers for both Mon-Fri and Sat than TV listings and reviews, while on Sunday they are approximately equal. How then can we say in the first chart (all papers Mon-Sun) that TV listings and reviews has a higher proportion of readers than Sport? The answer is that Sport reading has a more consistent audience reading across weekdays and weekend while readers of TV listings and reviews are more likely to be readers of that section either during the week or on the weekend, rather than both. Thus there is a larger number of different readers of TV listings and reviews than Sport when the whole week is considered.

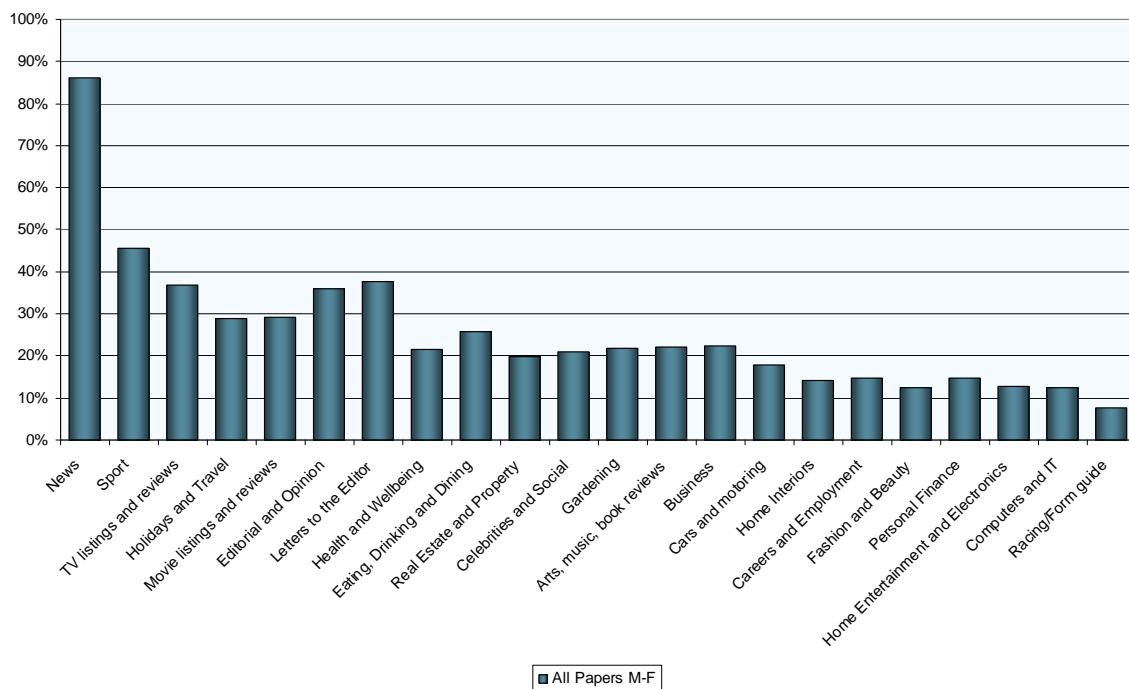
## Sectional Readers – all papers



## Differences in reading across the week

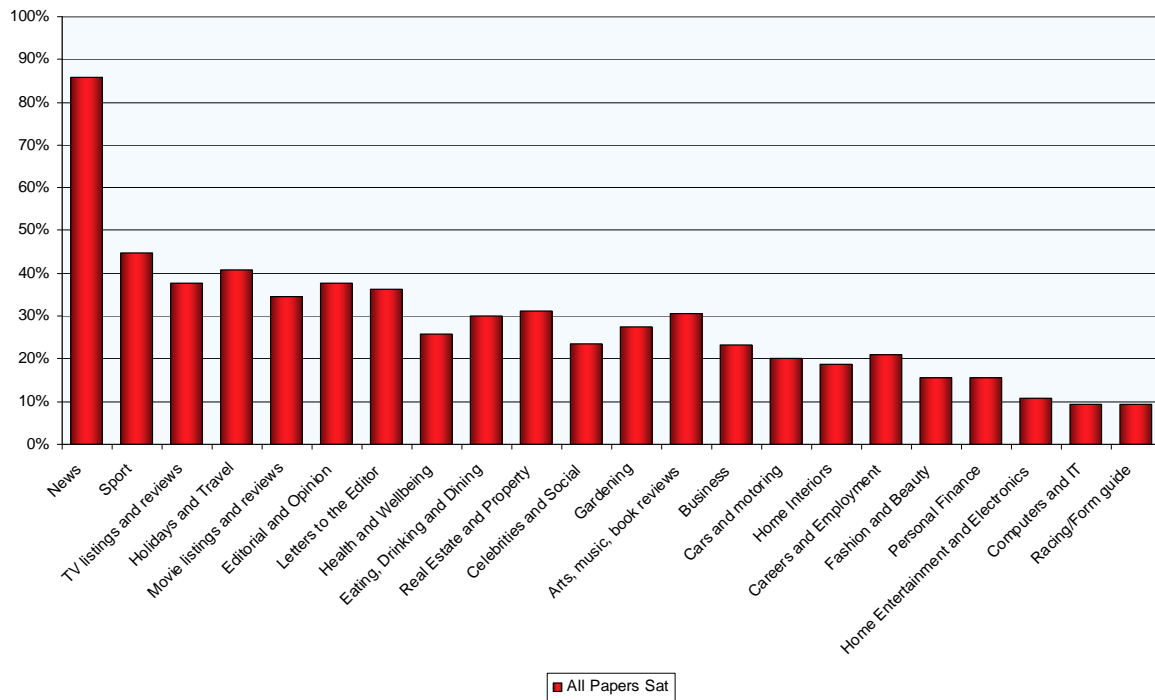
The readership incidence of *News* and *Sport* is fairly consistent for Monday-Friday, Saturday and Sunday newspaper editions. For a number of other sections/topics there are some noticeable differences.

## Monday-Friday Sectional Reading





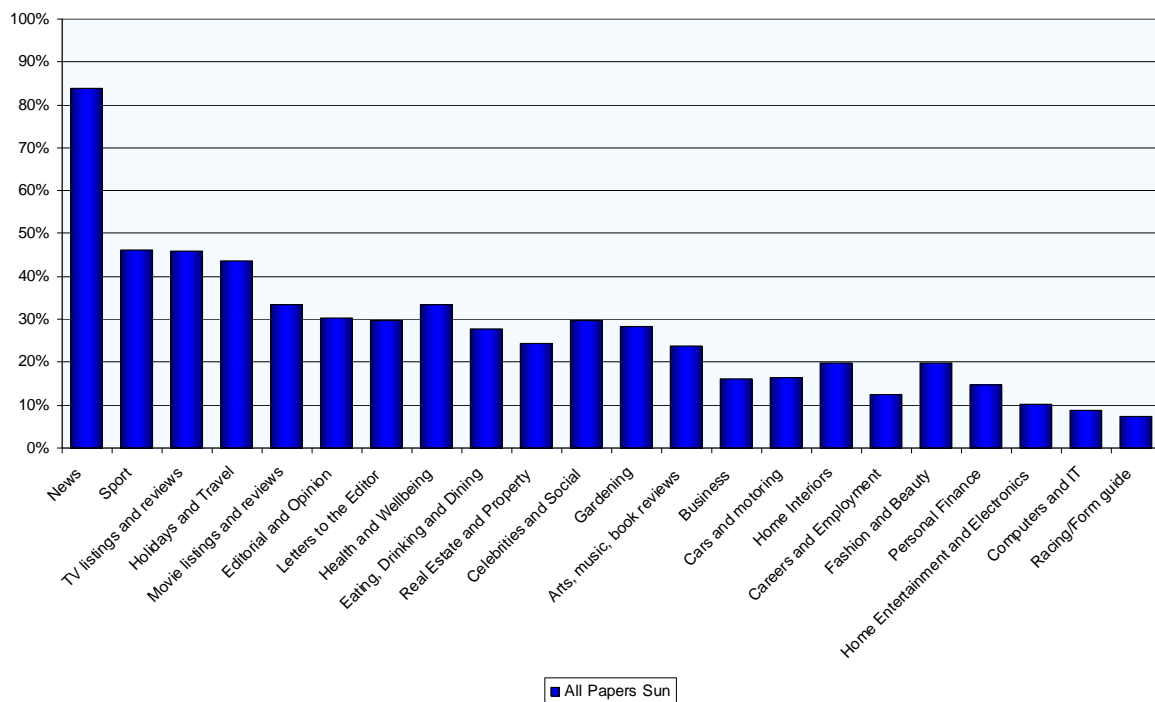
## Saturday Sectional Reading



On Saturday, Movie listings, *Eating, Drinking & Dining*, *Real Estate*, *Arts, music, book reviews*, *Cars & motoring* and *Careers & Employment* have a higher incidence of reading than on other days of the week.

On Sunday, TV listings and reviews, *Holidays & Travel*, *Health & Wellbeing* and *Fashion & Beauty* are more popular.

## Sunday Sectional Reading



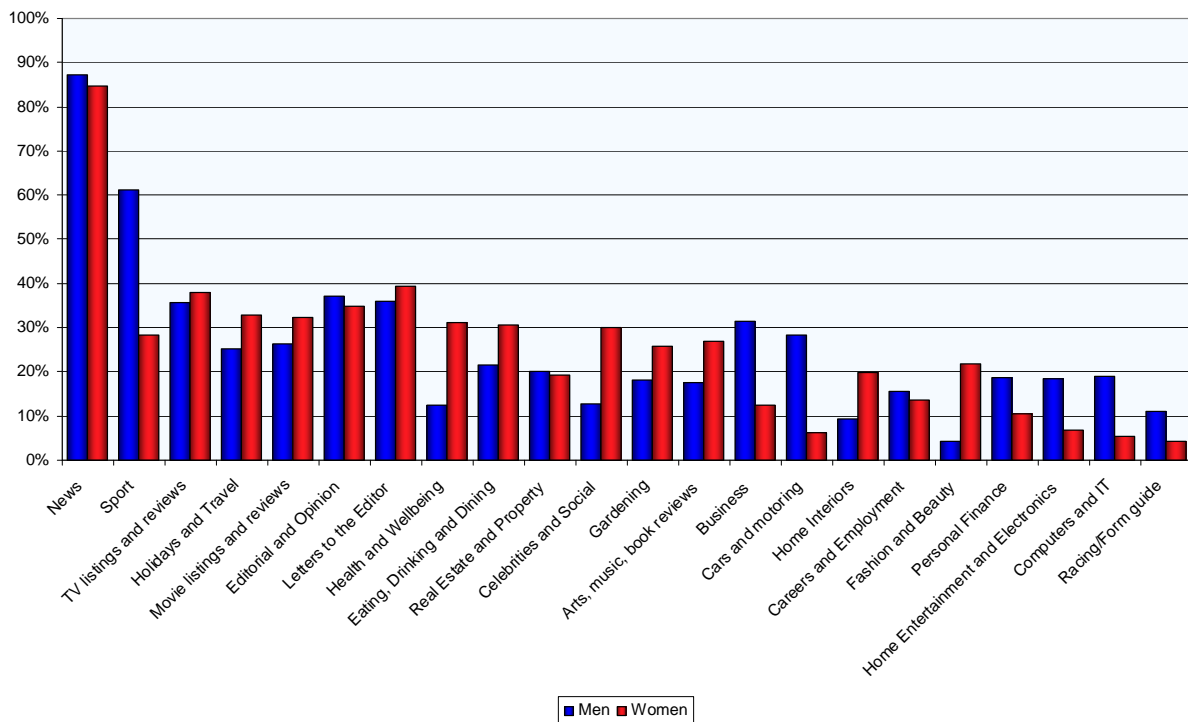
## Comparison between Men and Women

The charts below show the comparison between sections/topics which are most read by men and women. *News* is slightly higher for men than women. Others which are more popular among either men or women include:

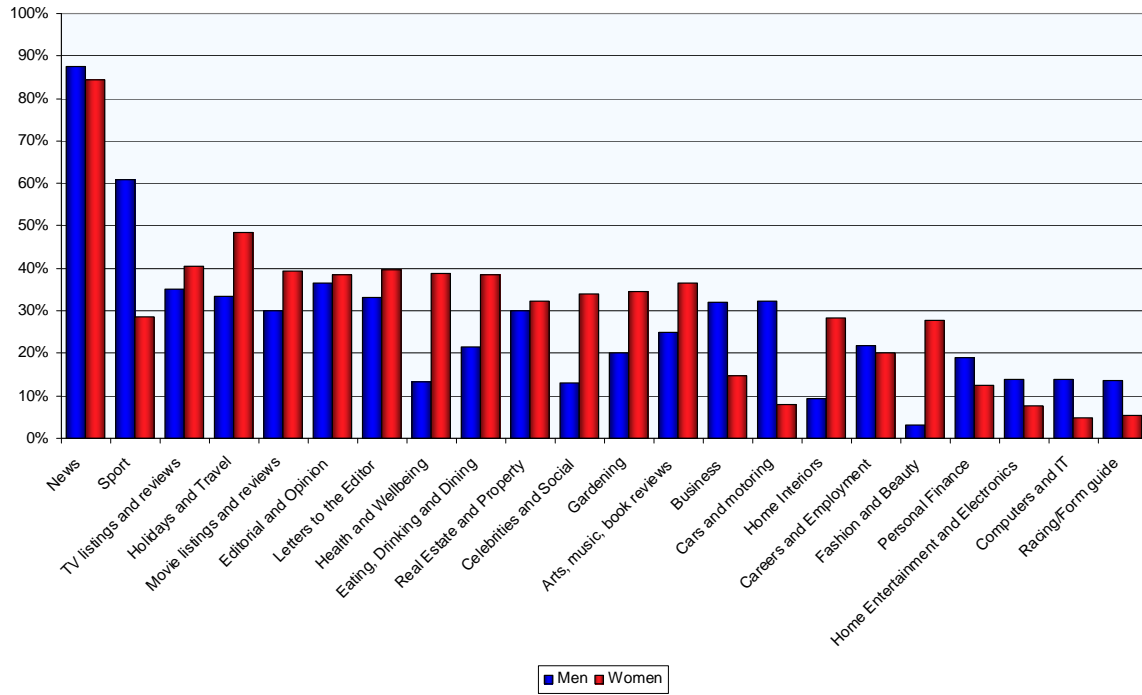
- MEN**
- *Sport*
  - *Business*
  - *Personal finance*
  - *Cars and motoring*
  - *Home entertainment*
  - *Computers/IT*
  - *Racing*

- WOMEN**
- *Holidays and travel*
  - *Health and wellbeing*
  - *Eating, drinking and dining*
  - *Celebrities and social*
  - *Gardening*
  - *Arts, music, book reviews*
  - *Home interiors*
  - *Fashion and beauty*

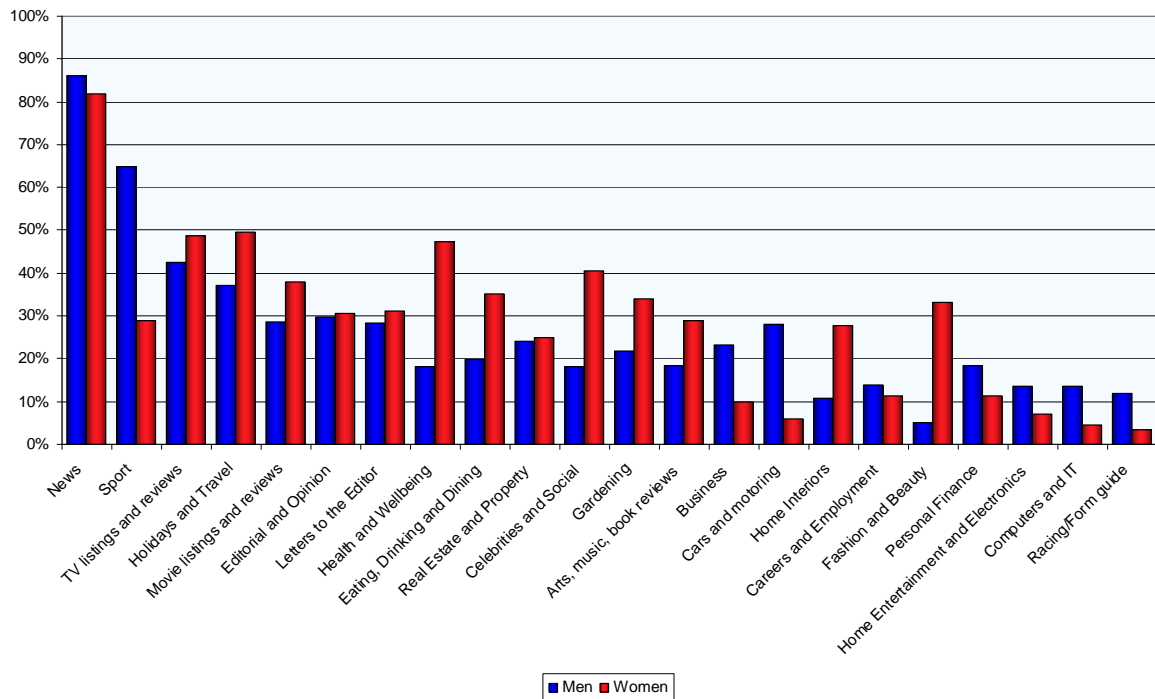
## Mon-Fri Sectional Reading - Men vs Women



## Saturday Sectional Reading - Men vs Women



## Sunday Sectional Reading - Men vs Women



**Sections by proportion of men and women**

Another way of understanding the gender differences of the different section audiences is to look at the relative proportions of men versus women for each section as the table below shows.

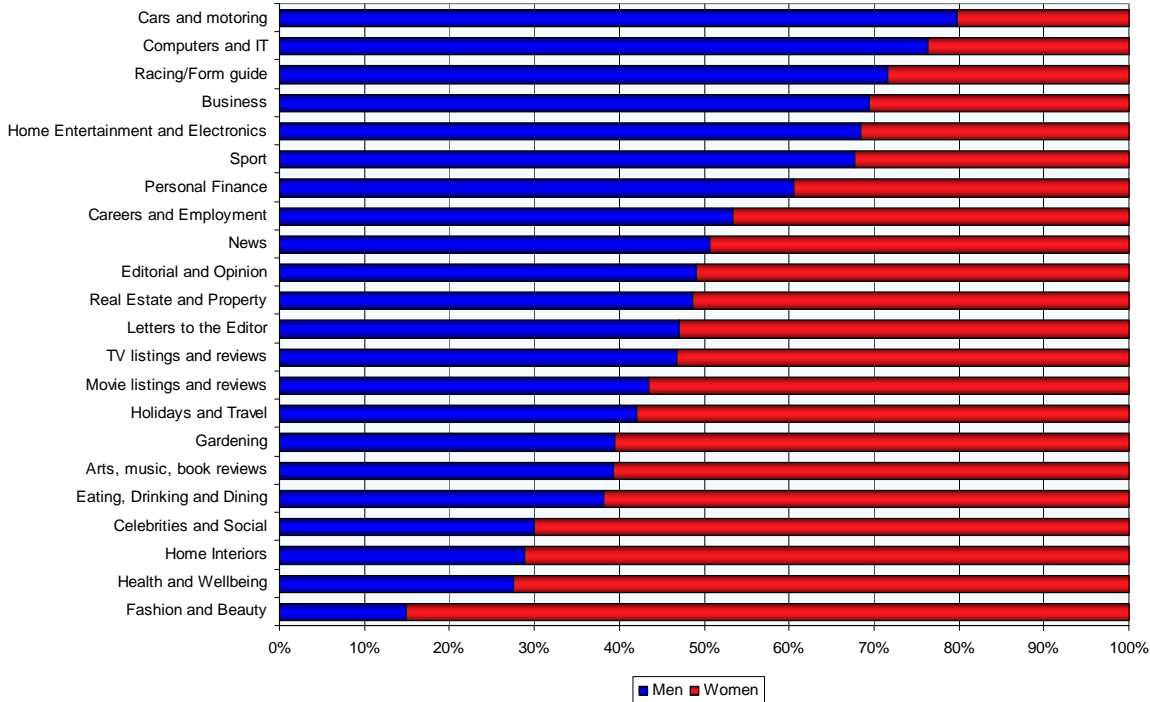
The top five sections by highest proportion of Women readers are:

- 1. *Fashion & Beauty*
- 2. *Health & Wellbeing*
- 3. *Home Interiors*
- 4. *Celebrities & Social*
- 5. *Eating, Drinking & Dining*

The top five sections by highest proportion of Men readers are:

- 1. *Cars & Motoring*
- 2. *Computers & IT*
- 3. *Racing/Form guide*
- 4. *Business*
- 5. *Home Entertainment & Electronics*

**Sections: Proportion of Men vs Women readers (all papers)**



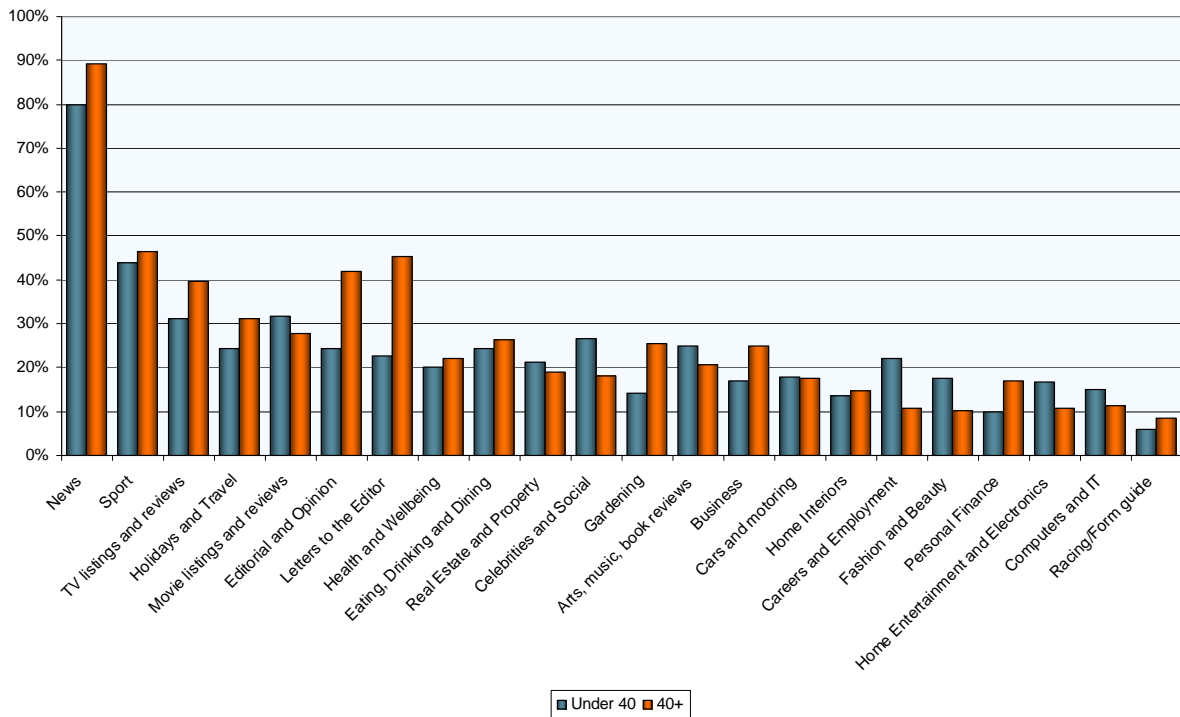
## Comparison between Younger and Older sectional readers

A comparison of readers aged under 40 and 40+ highlights some major differences in the focus of readers. Greater proportions of people 40+ read more traditional newspaper sections/topics such as *News*, *Editorial & Opinion*, *Letters to the Editor* and *Business*.

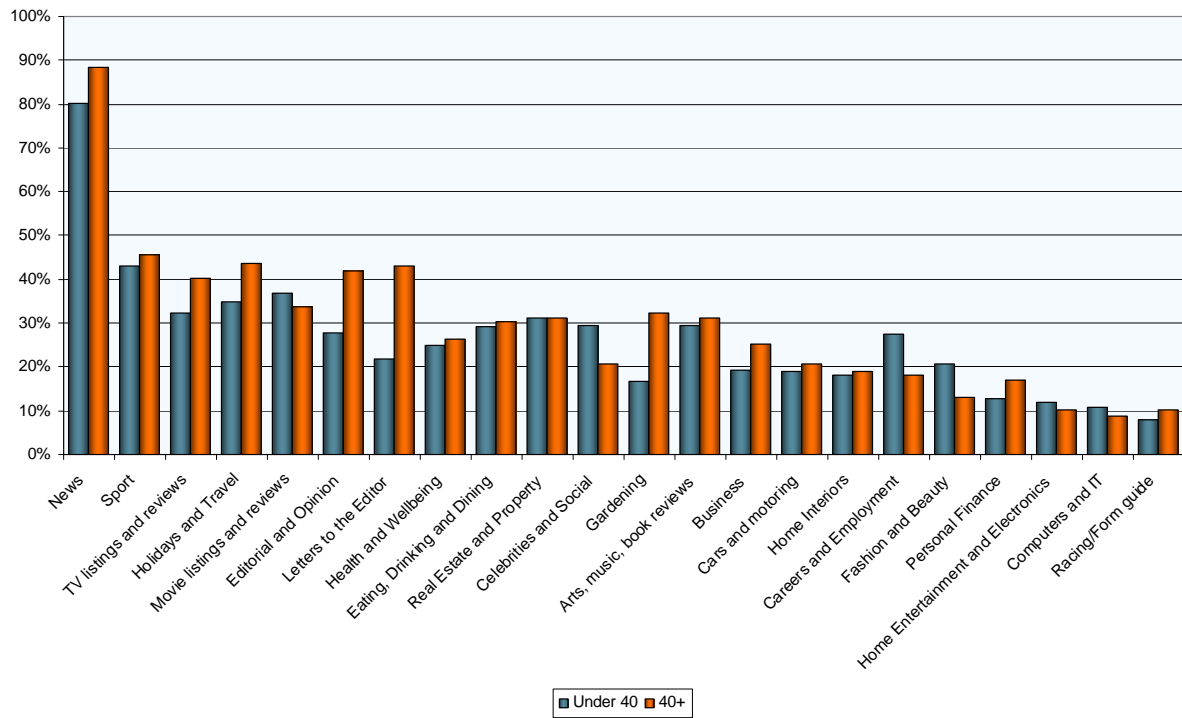
The sections/topics that are more populated by readers aged under 40 are *Movie listings and reviews*, *Celebrities and Social*, *Careers and Employment* and *Fashion and Beauty*.

The older group are greater consumers of newspapers.

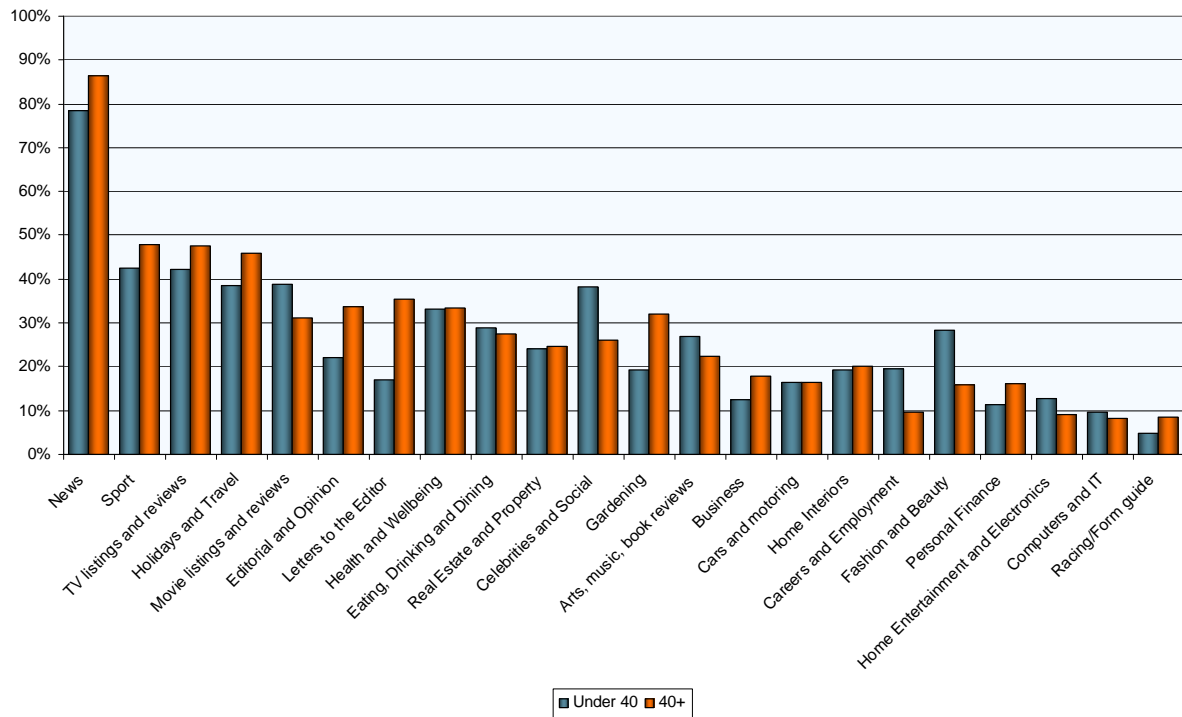
## Mon-Fri Sectional Reading - under 40 vs 40+



## Saturday Sectional Reading - under 40 vs 40+



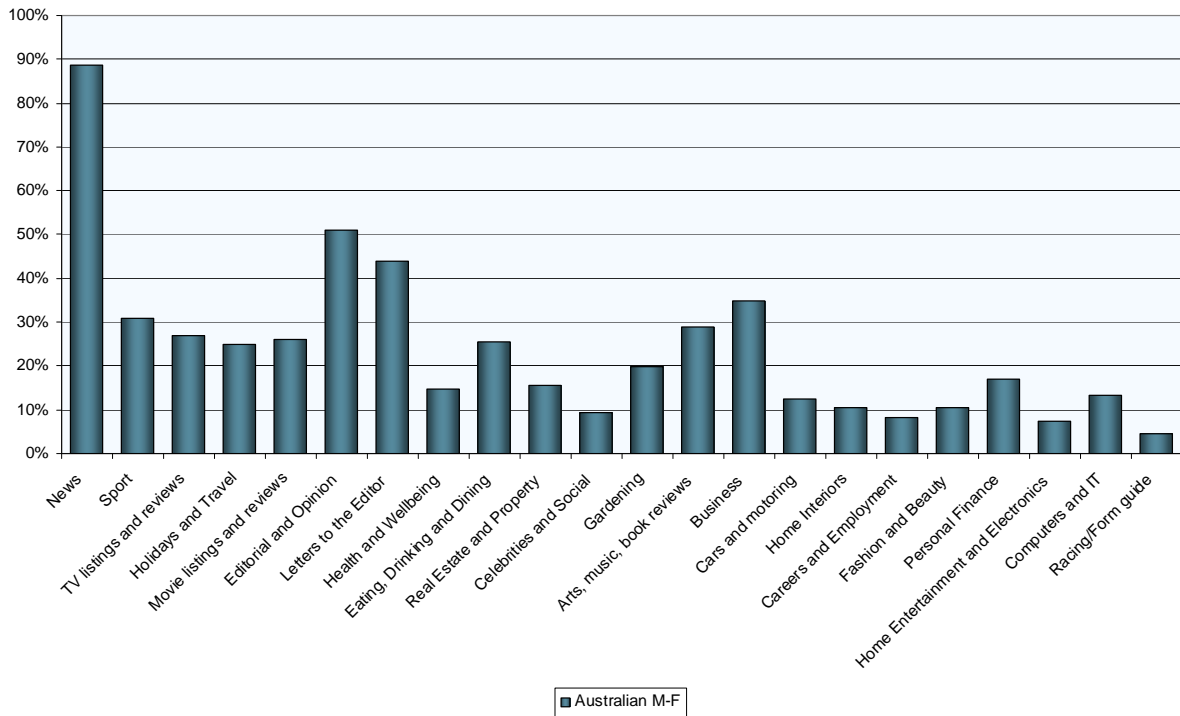
## Sunday Sectional Reading - under 40 vs 40+



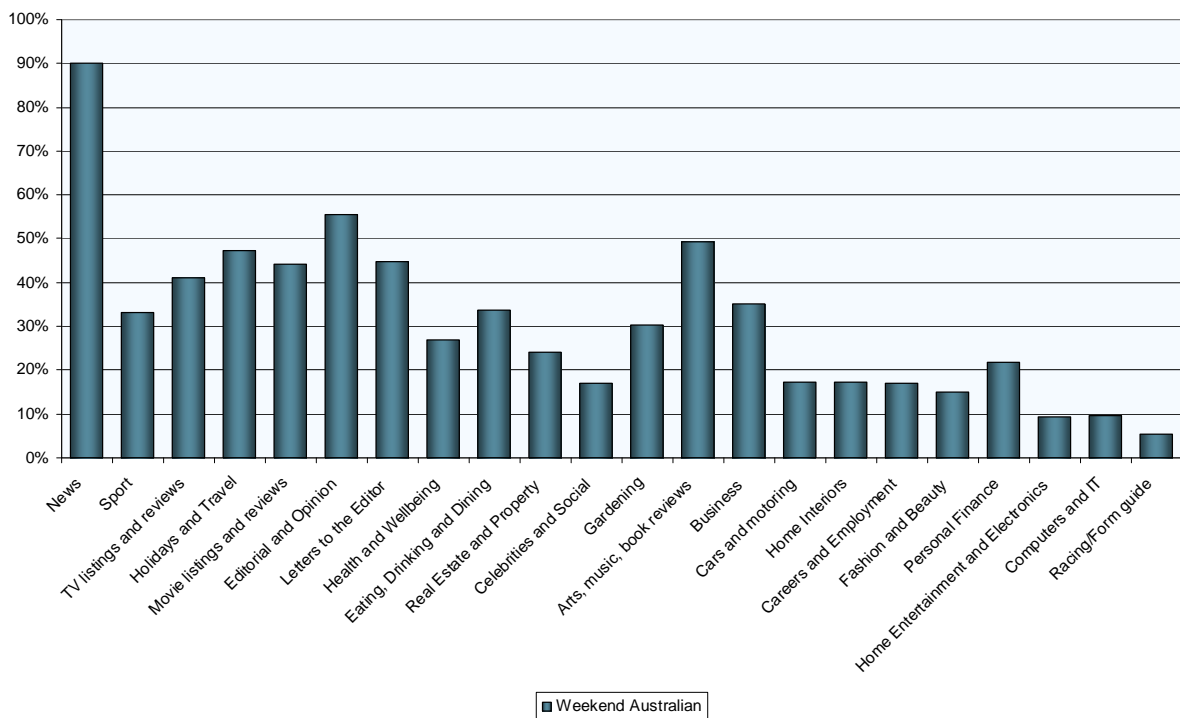
## Sectional reading incidence by individual masthead

The following charts show the varying incidence of sectional reading for each of the major metropolitan newspaper titles.

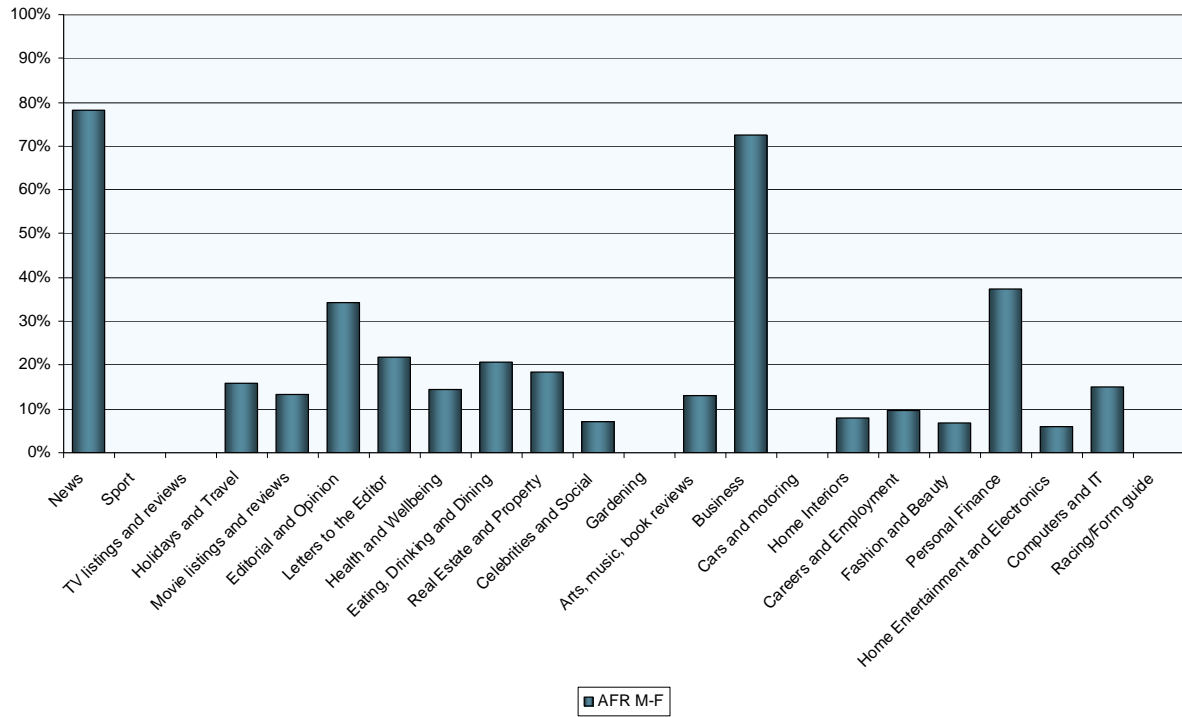
### Australian M-F sectional reading



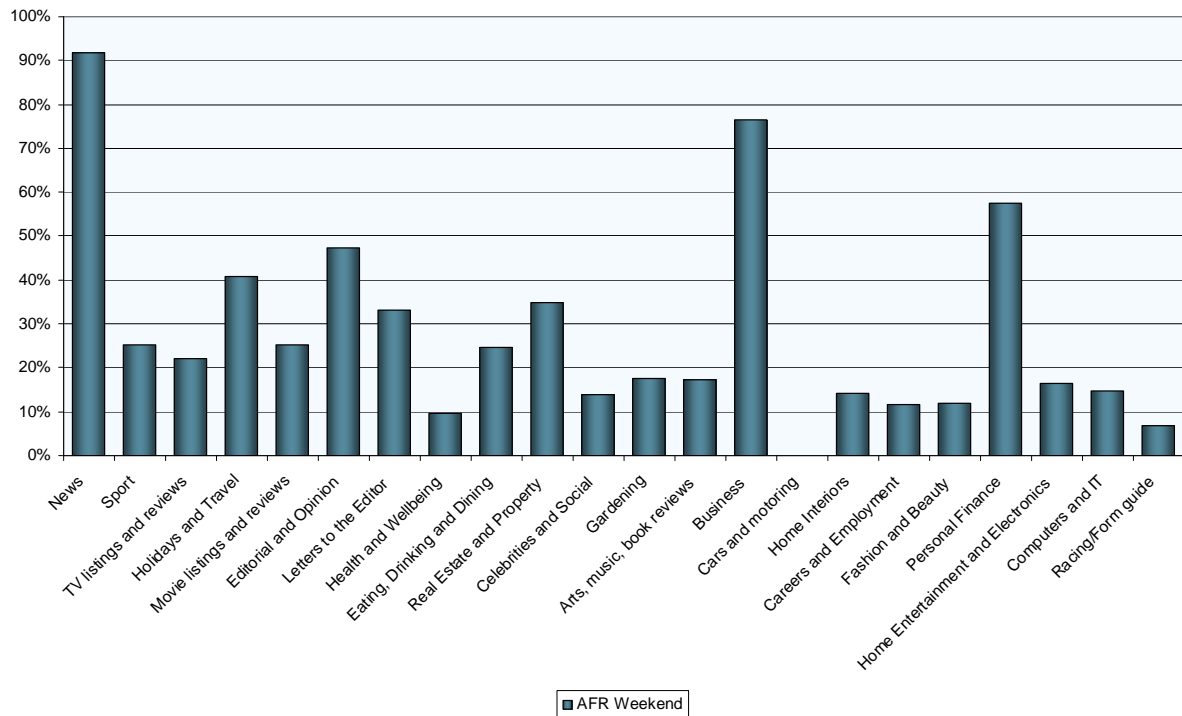
### Weekend Australian sectional reading



## Australian Financial Review M-F sectional reading

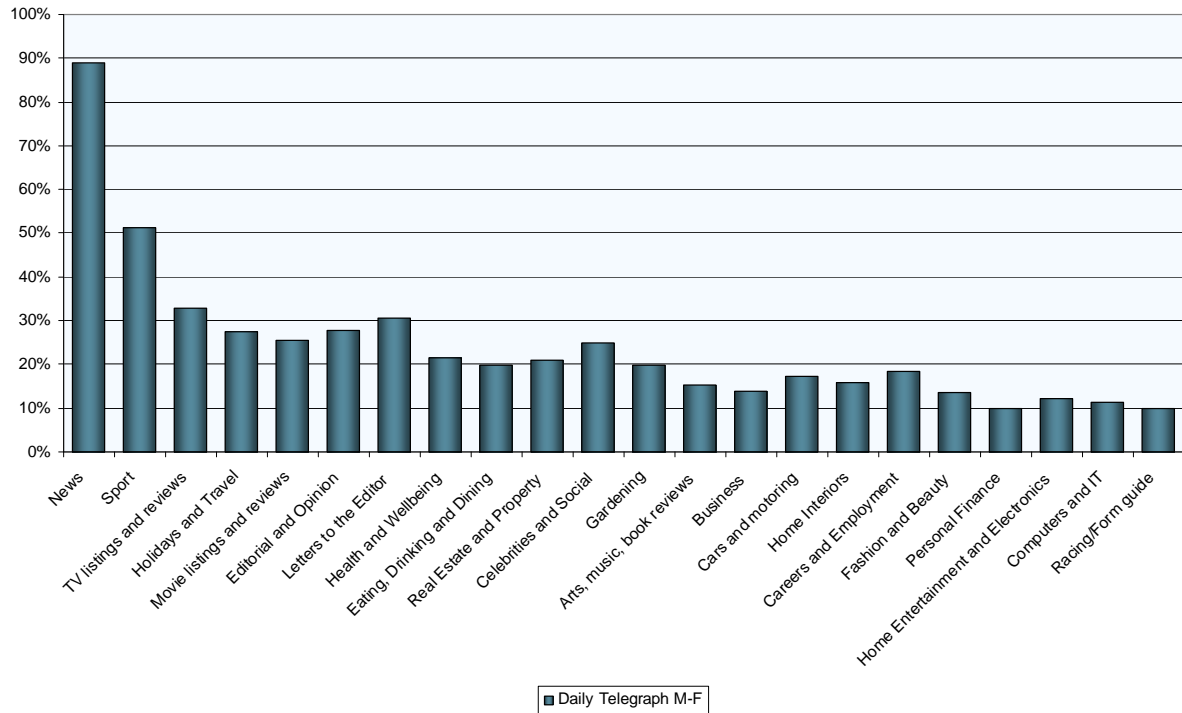


## Weekend Financial Review sectional reading

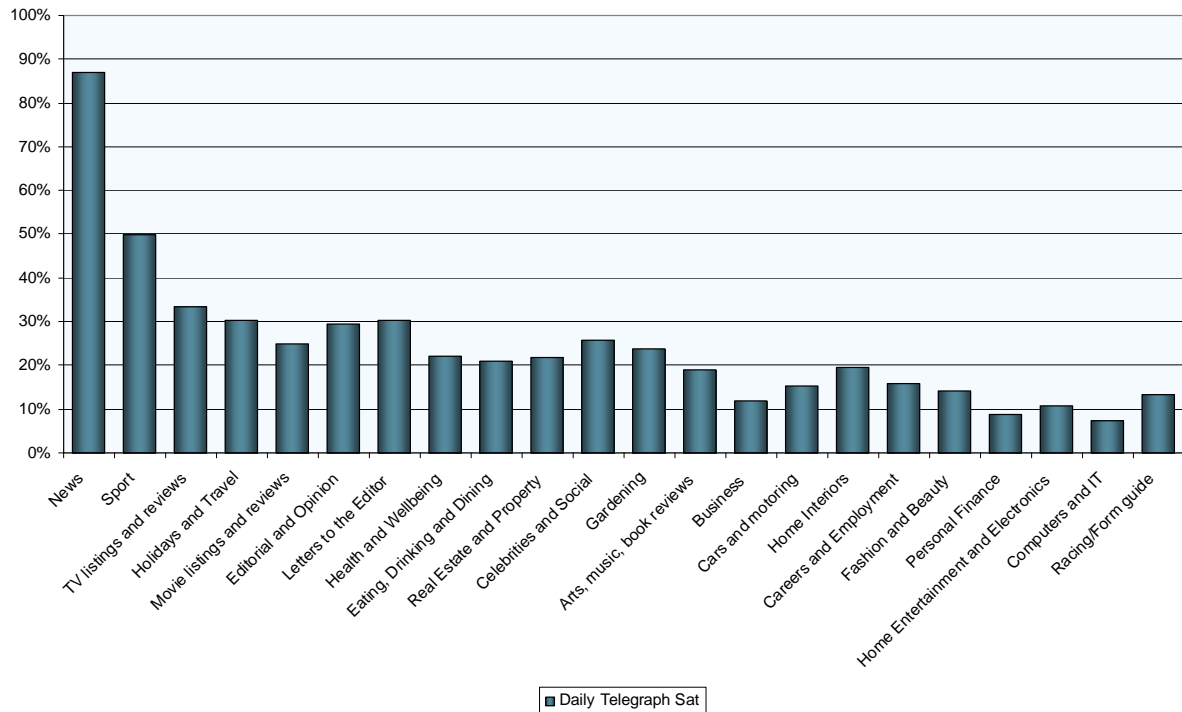




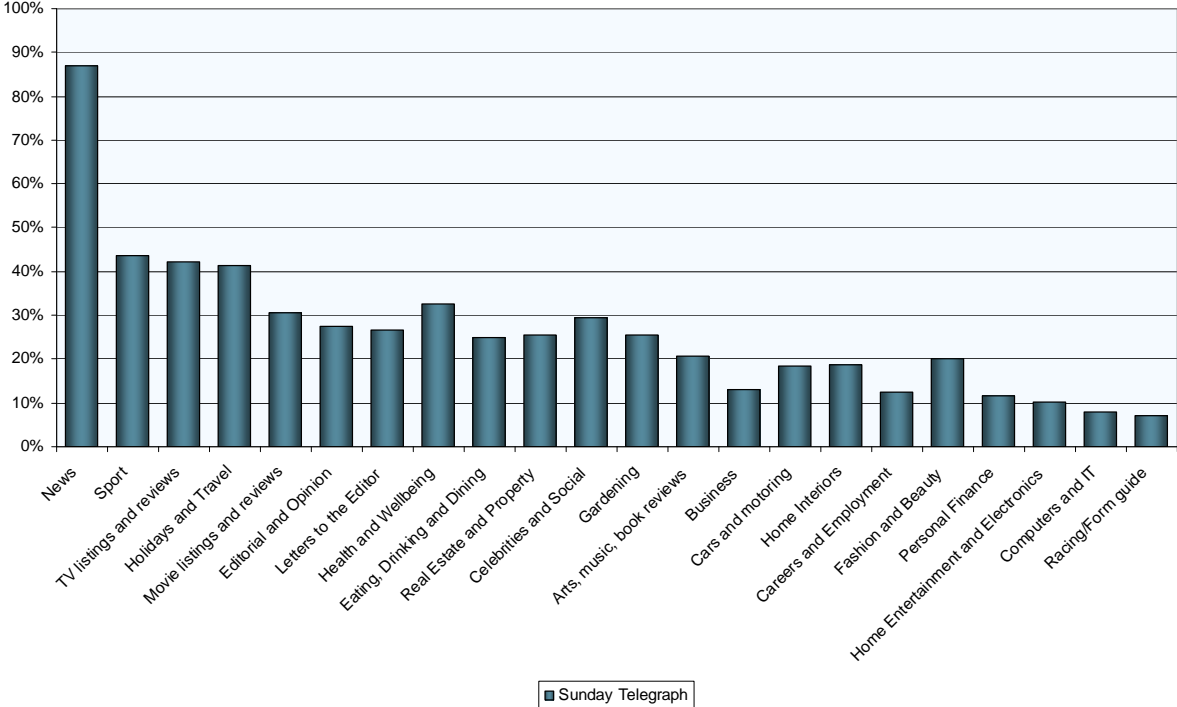
## Daily Telegraph M-F sectional reading



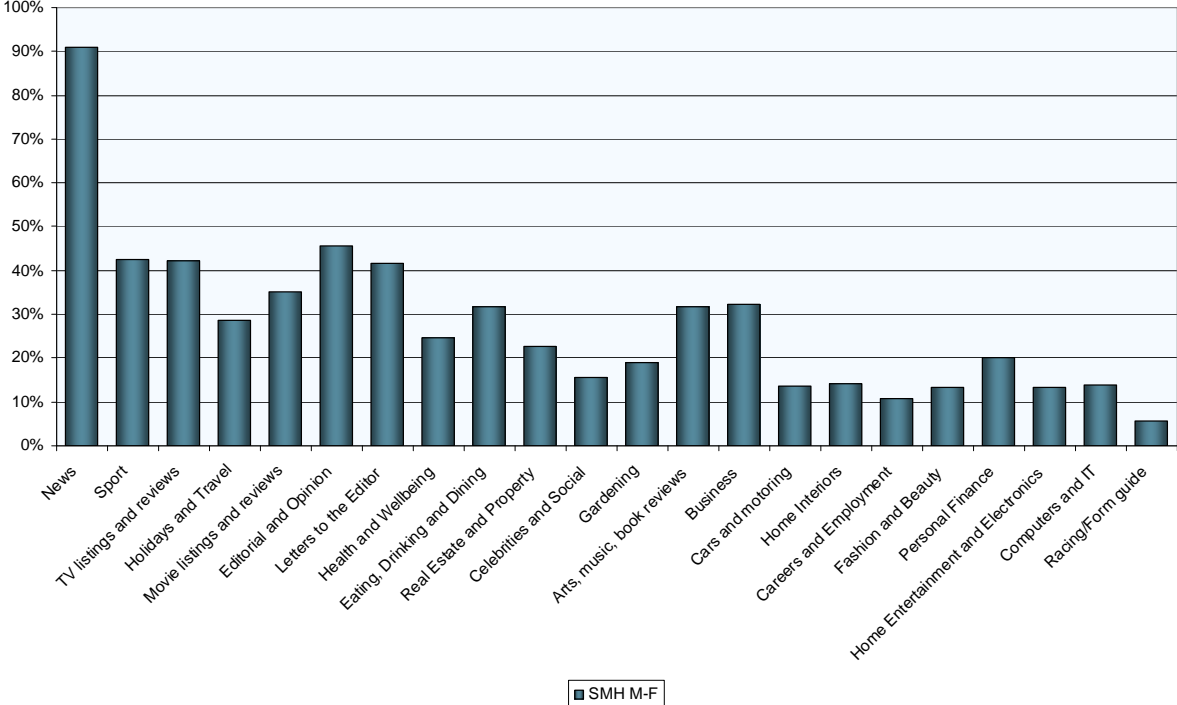
## Daily Telegraph Sat sectional reading



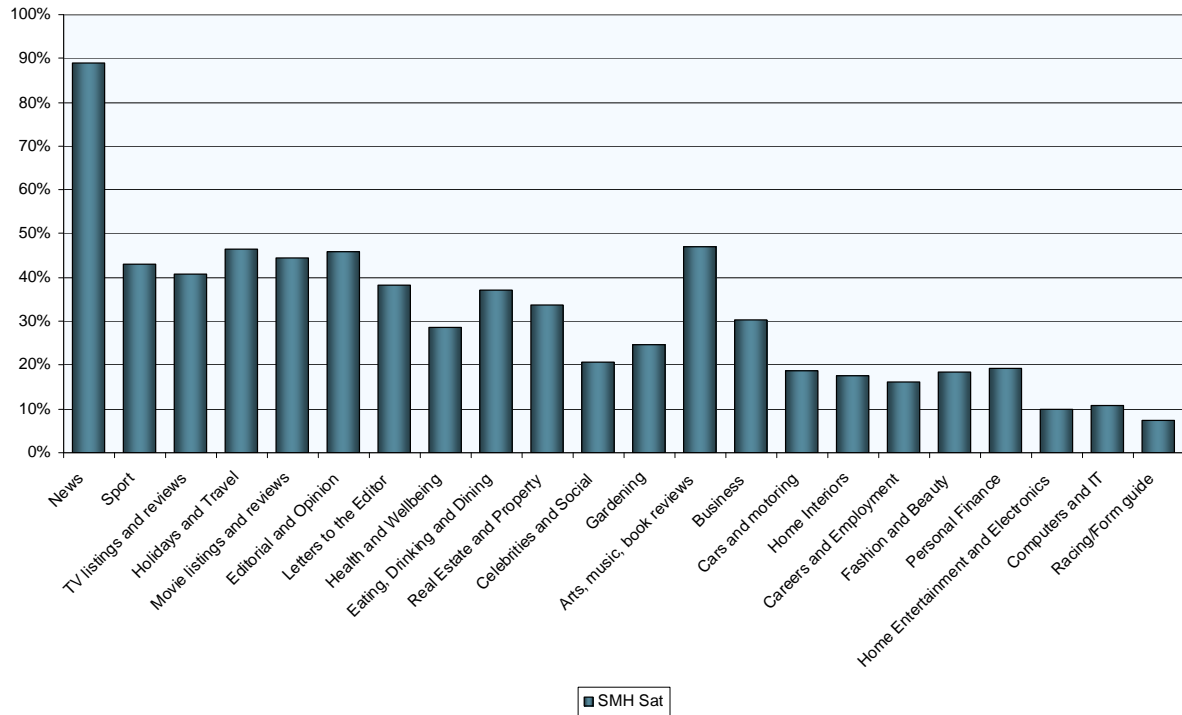
### Sunday Telegraph sectional reading



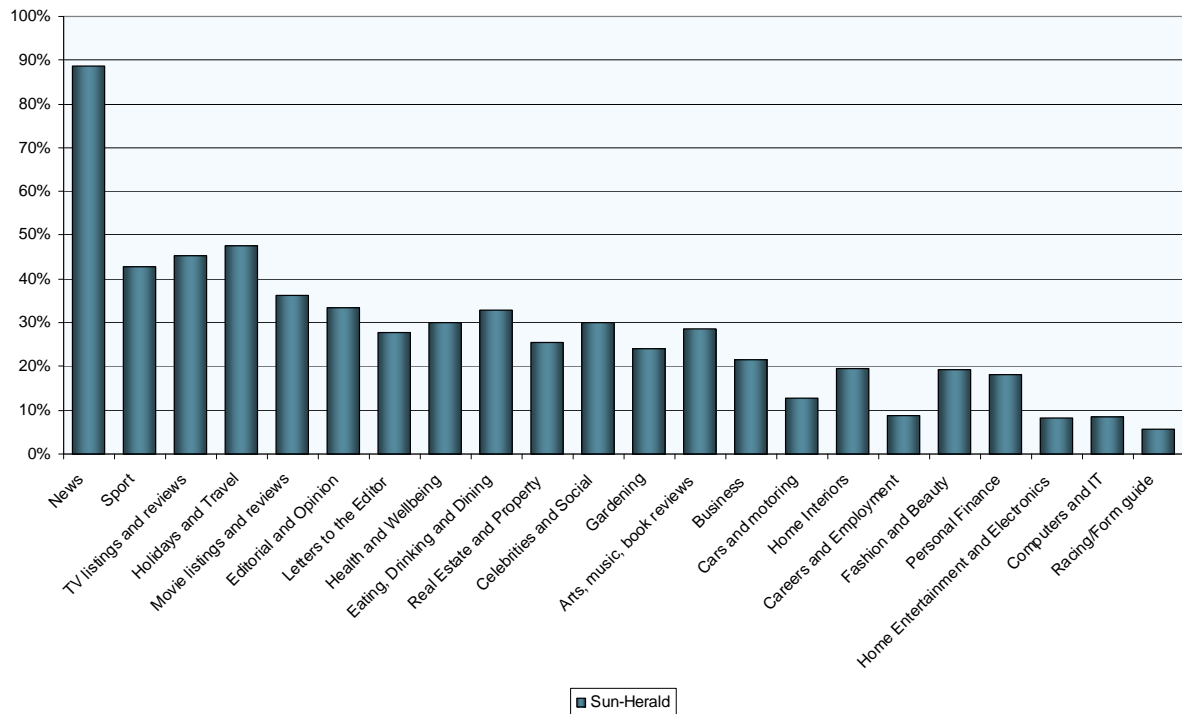
### SMH M-F sectional reading



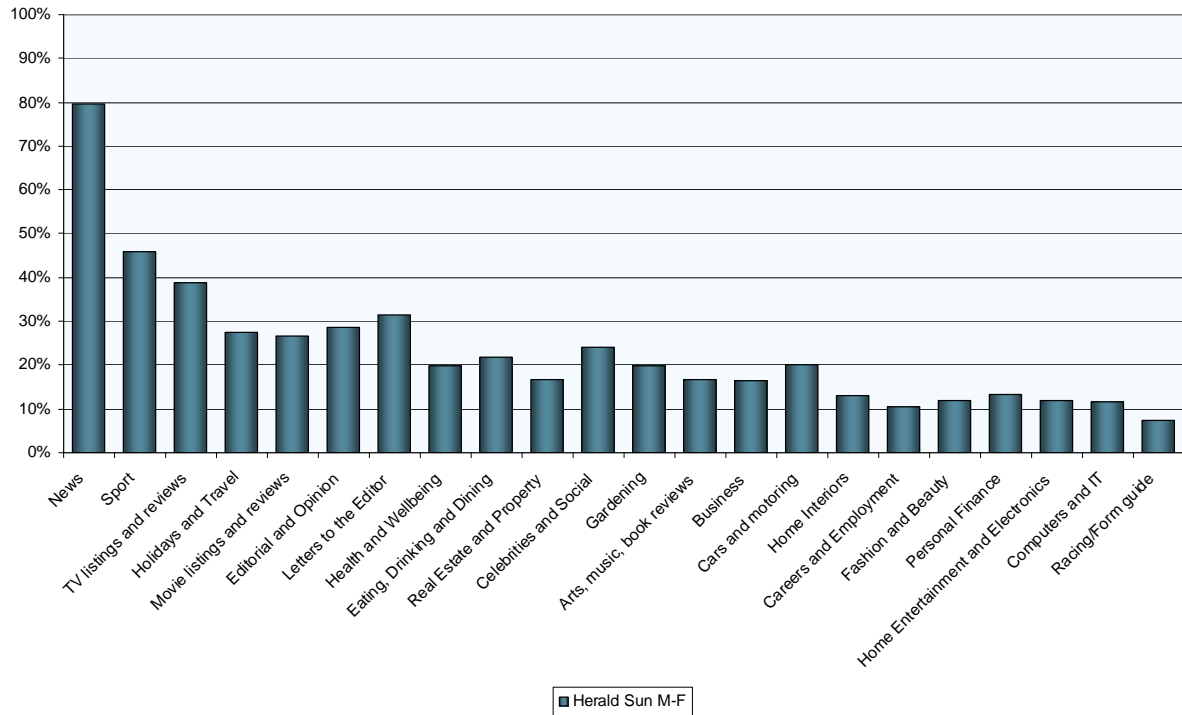
## SMH Sat sectional reading



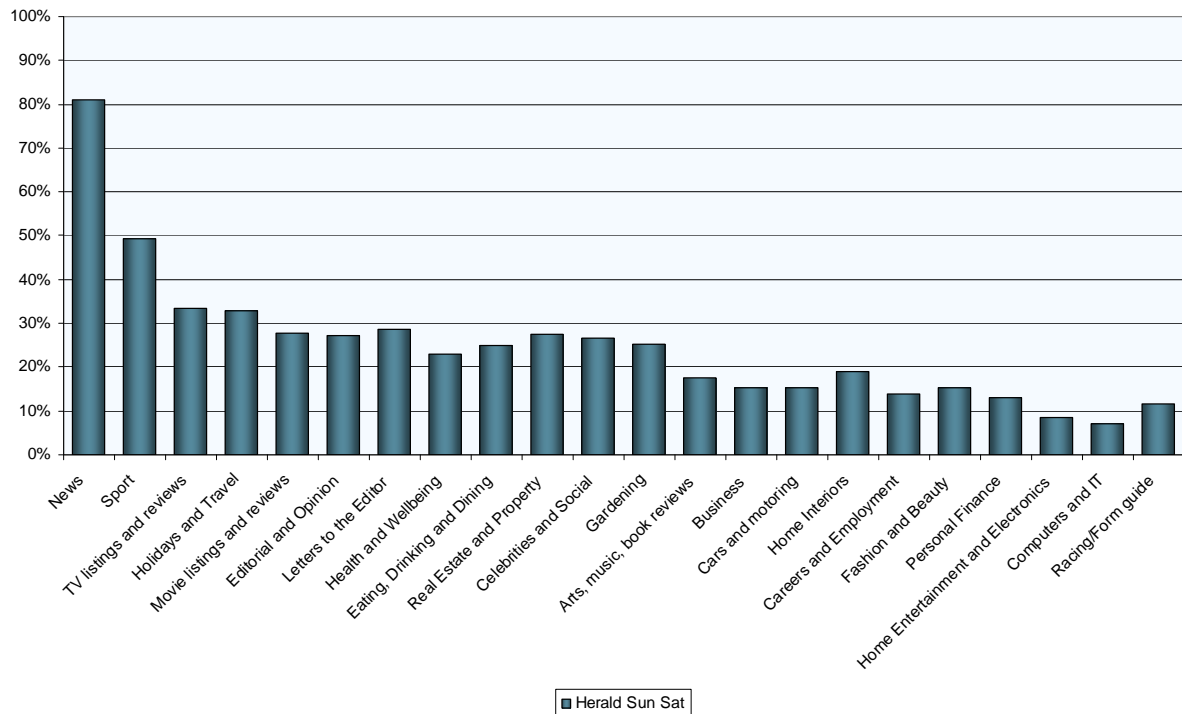
## Sun-Herald sectional reading



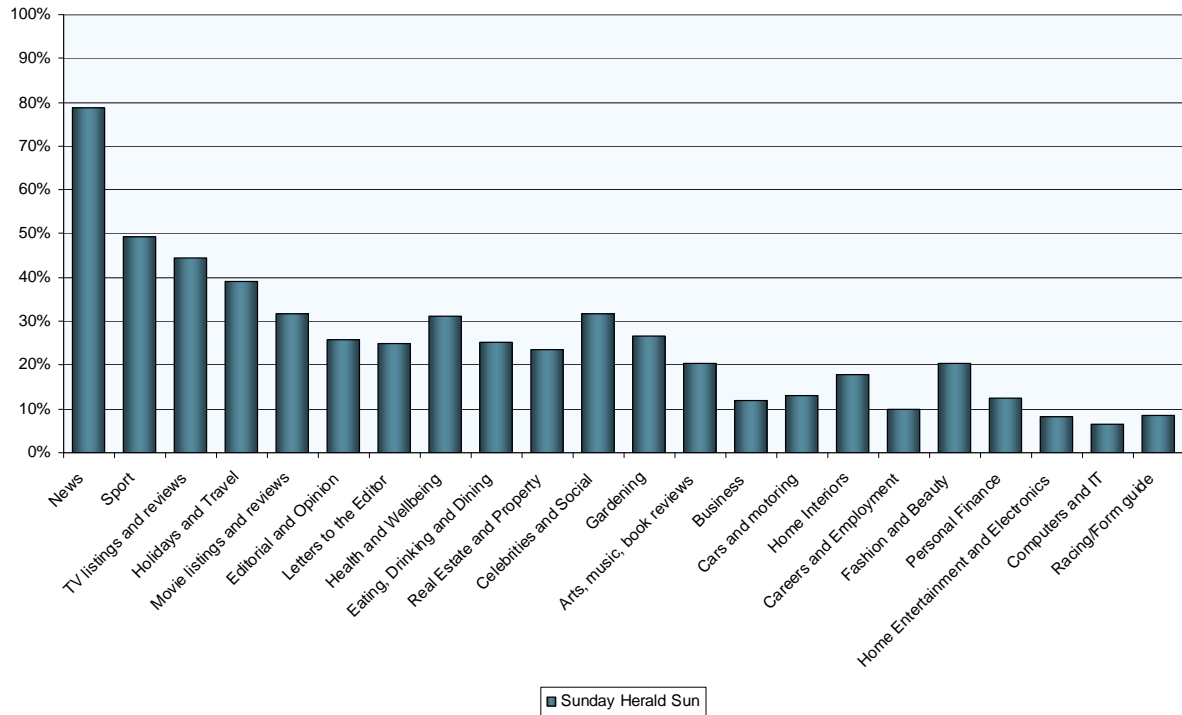
## Herald Sun M-F sectional reading



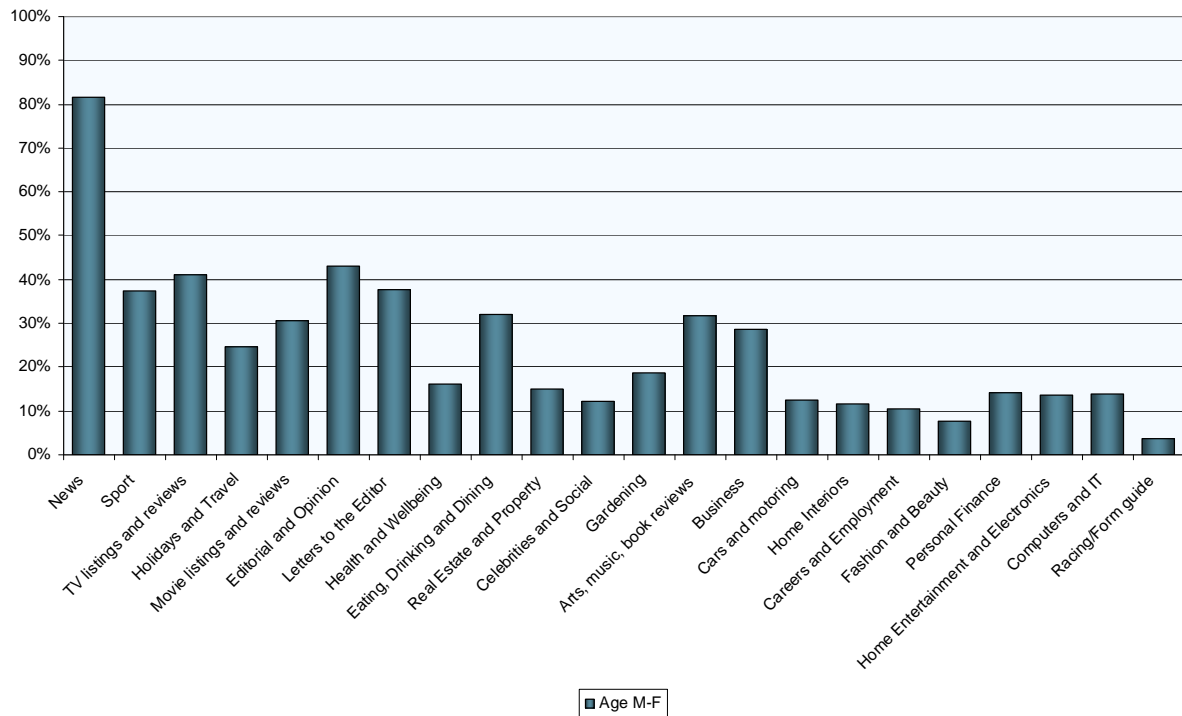
## Herald Sun Sat sectional reading



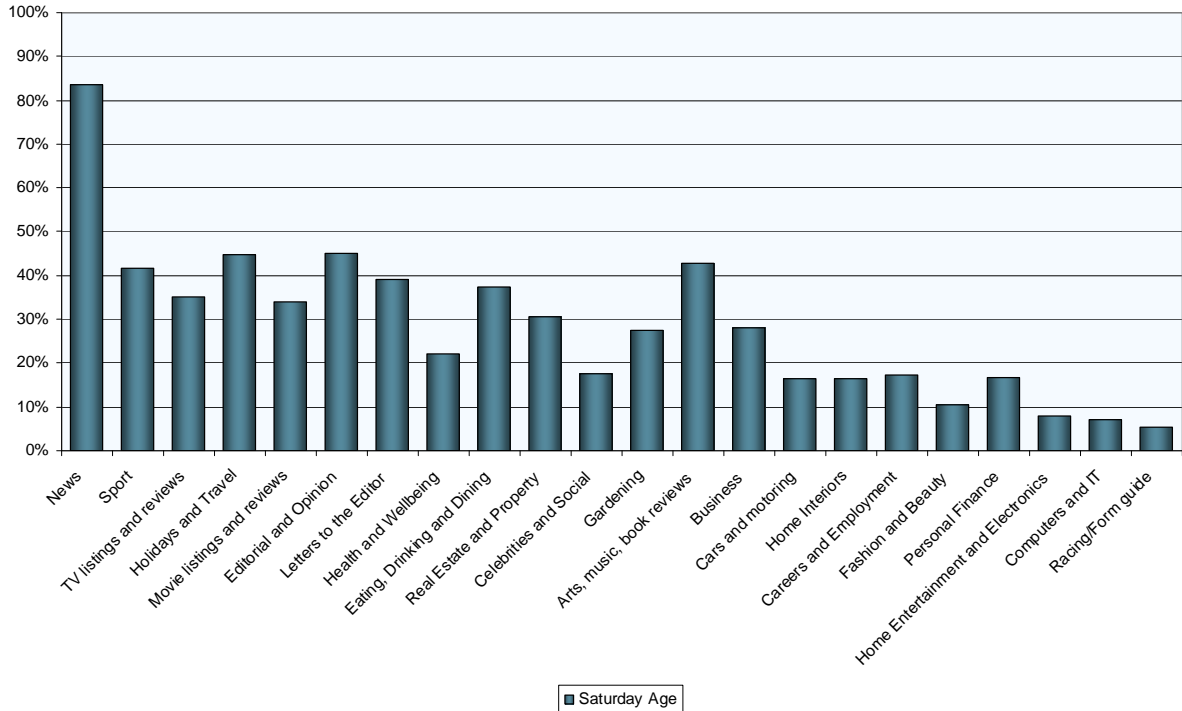
## Sunday Herald Sun sectional reading



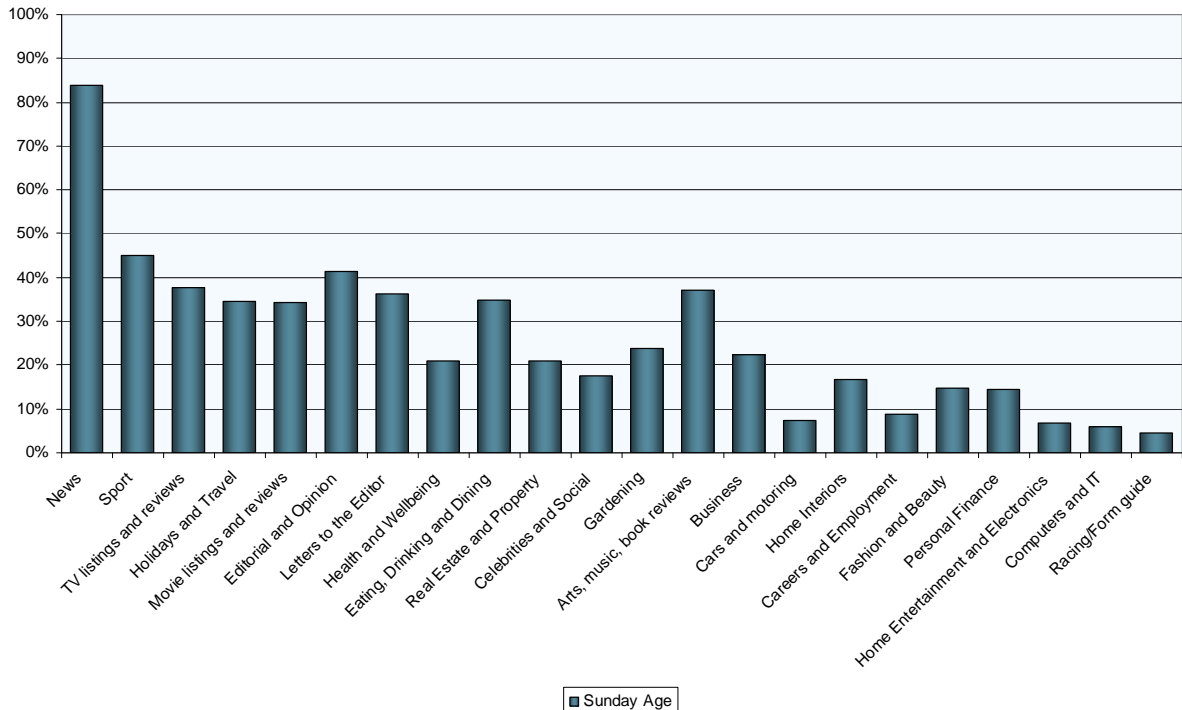
## Age M-F sectional reading



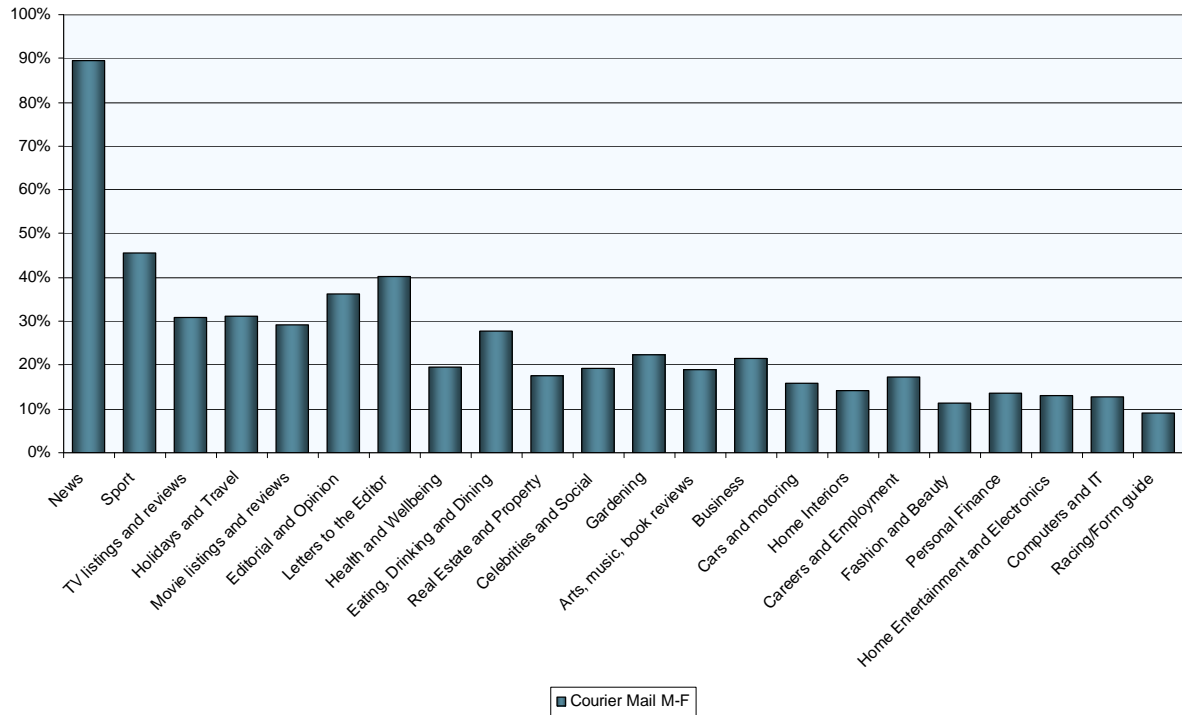
### Saturday Age sectional reading



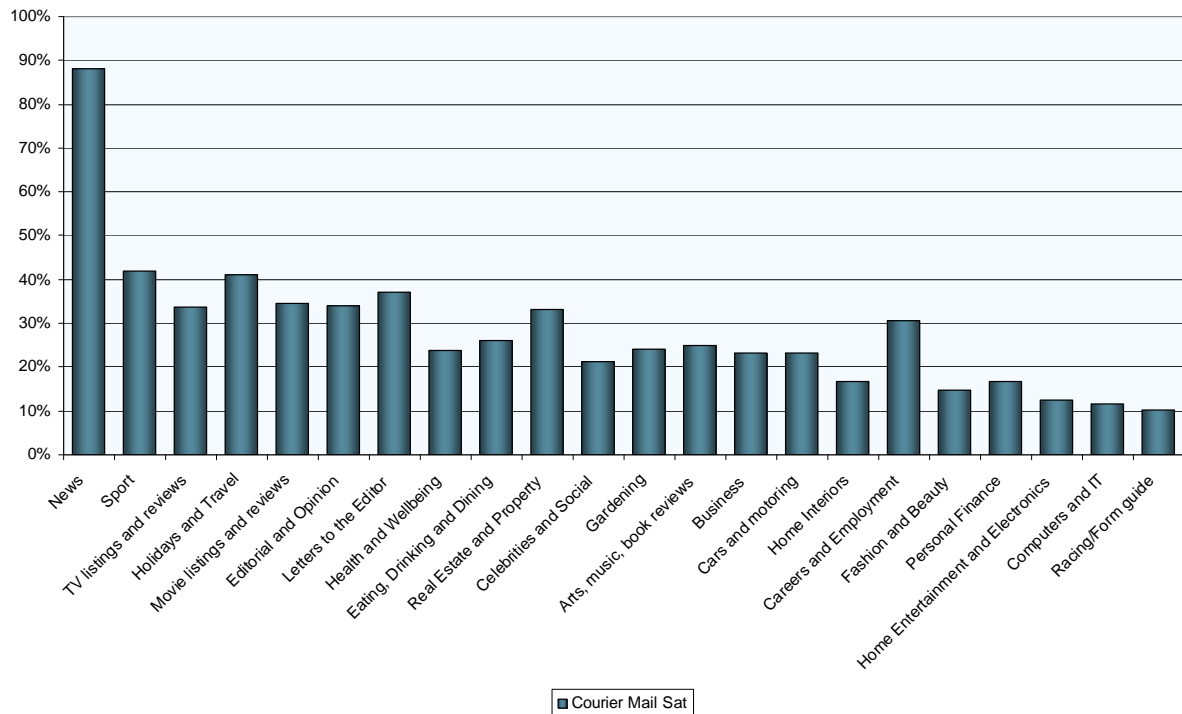
### Sunday Age sectional reading



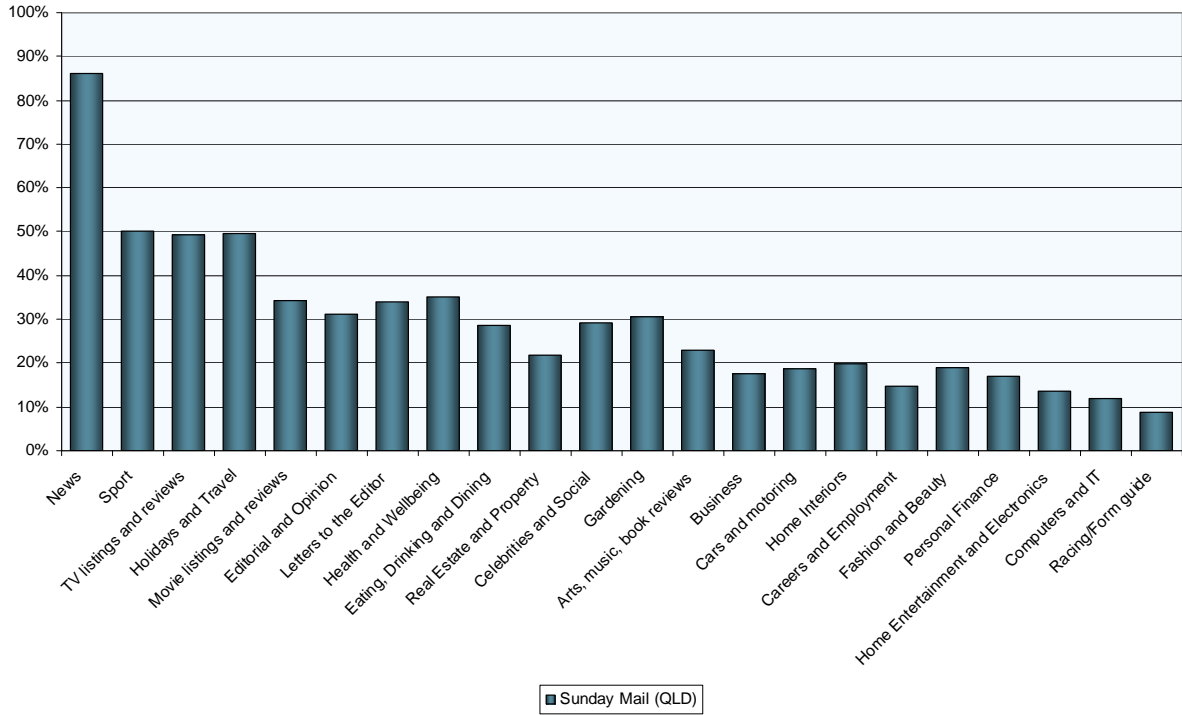
## Courier Mail M-F sectional reading



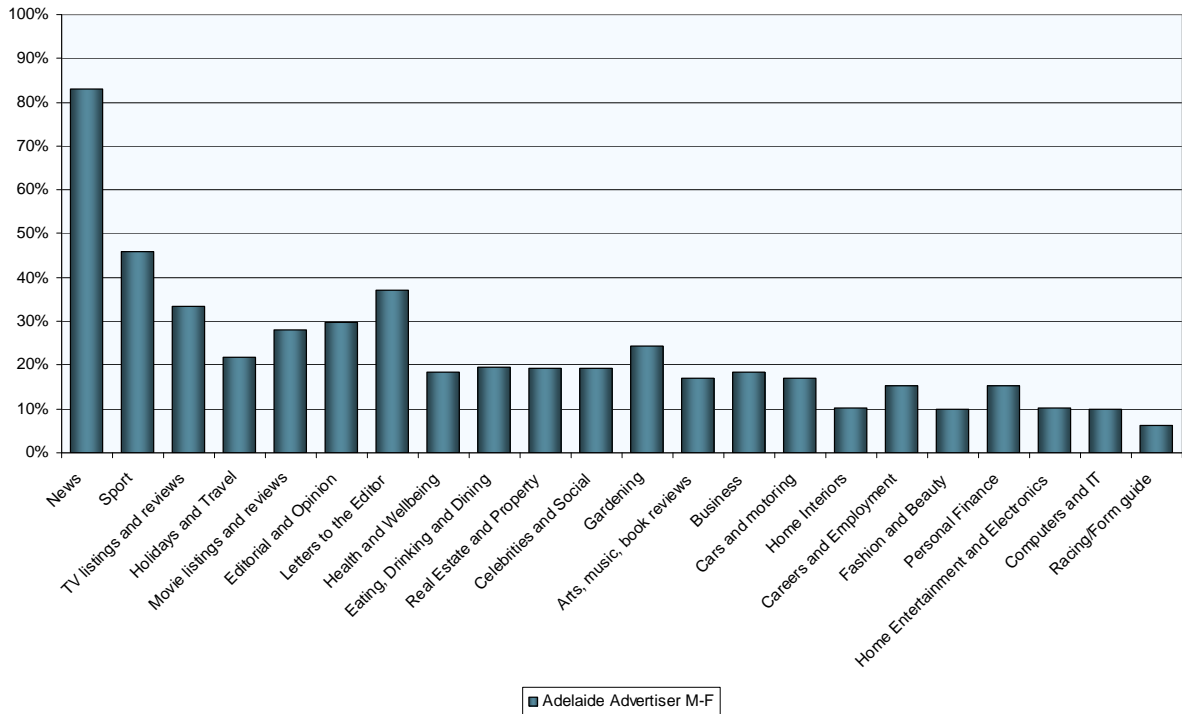
## Courier Mail Sat sectional reading



### Sunday Mail (Qld) sectional reading

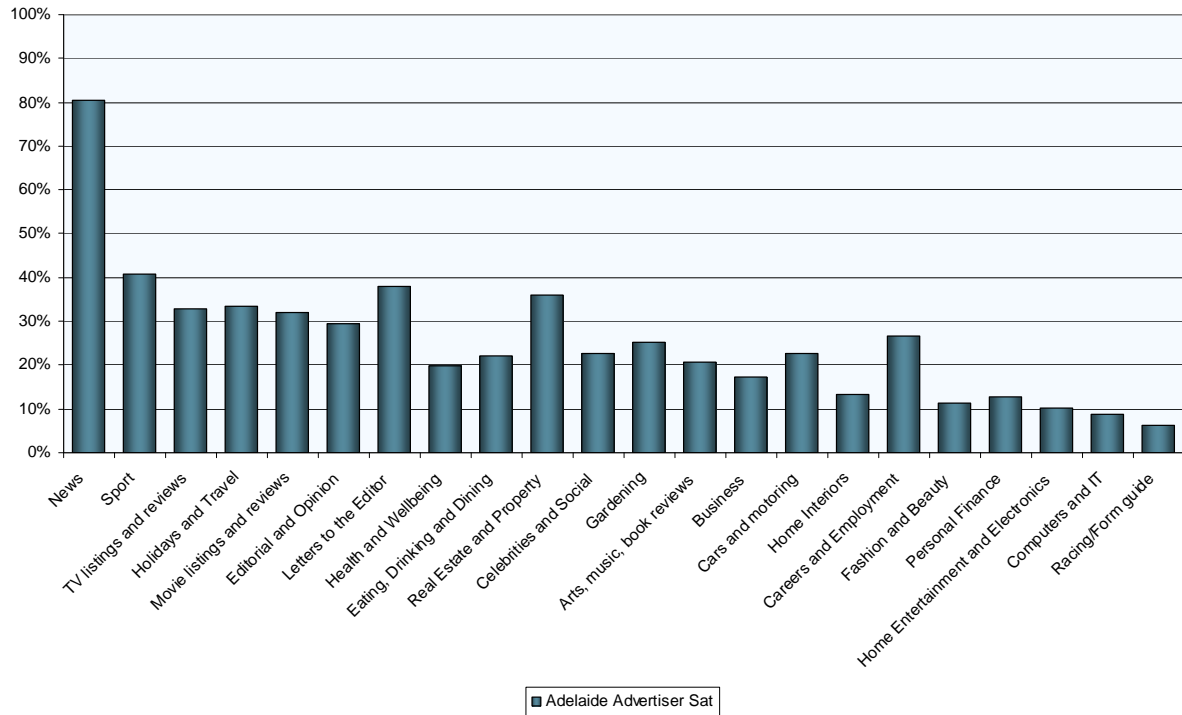


### Adelaide Advertiser M-F sectional reading

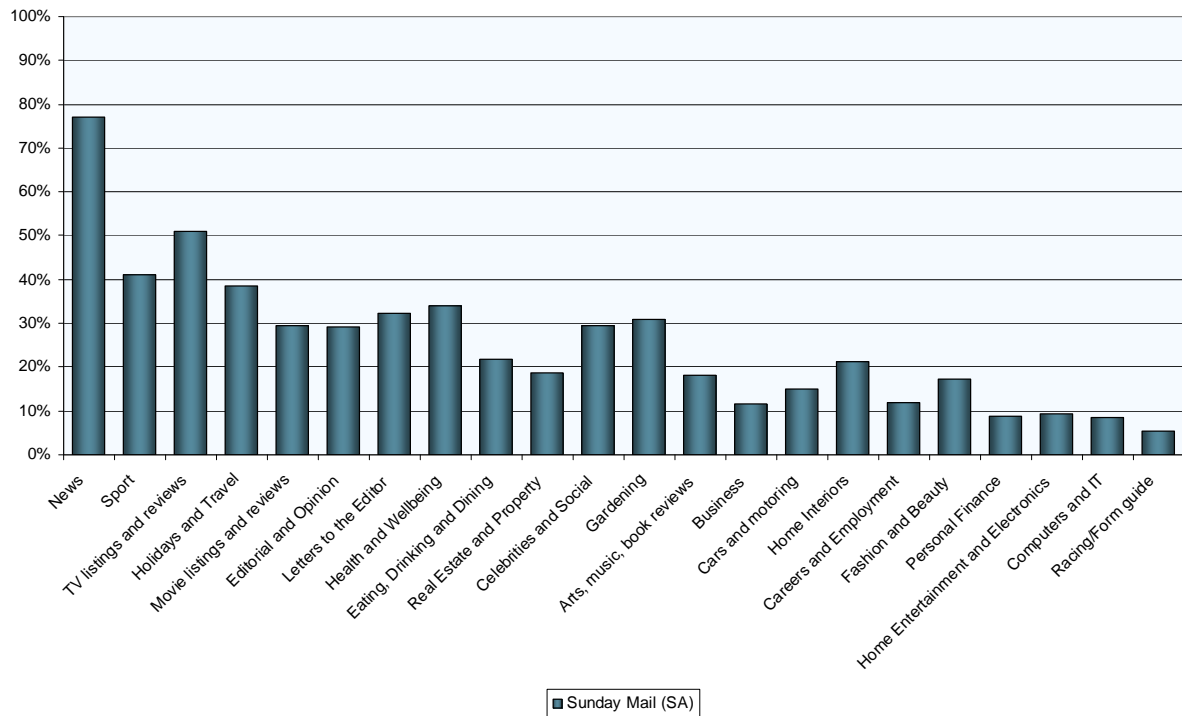




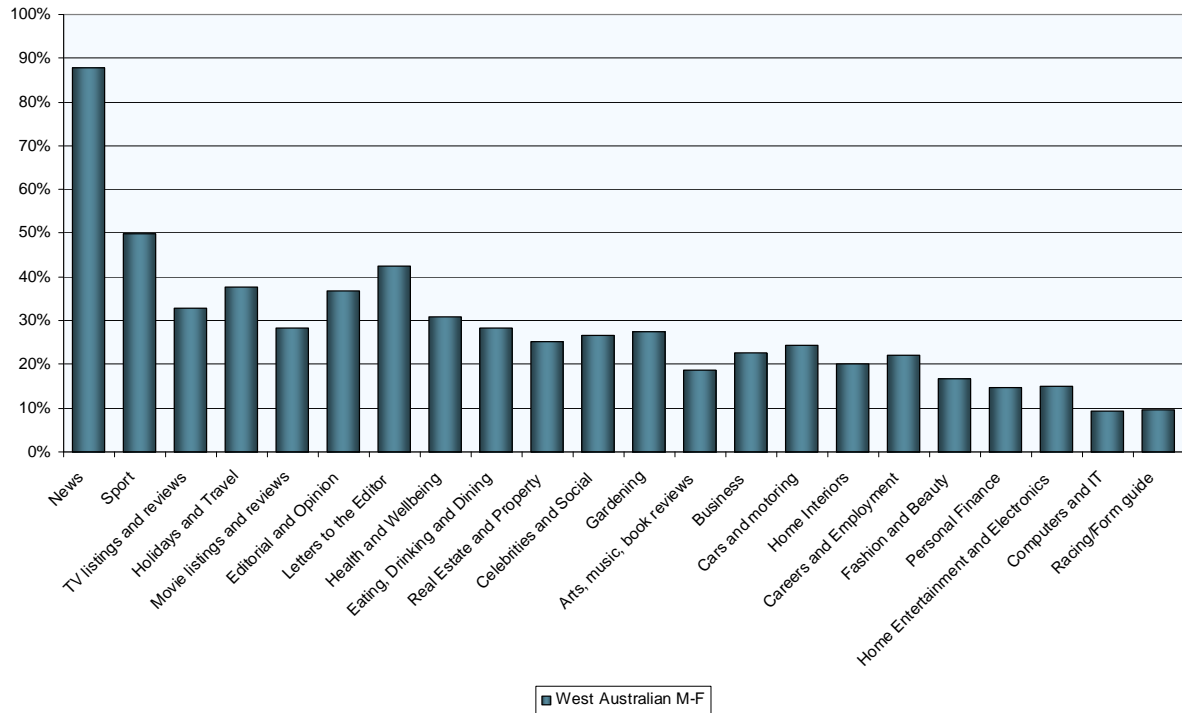
## Adelaide Advertiser Sat sectional reading



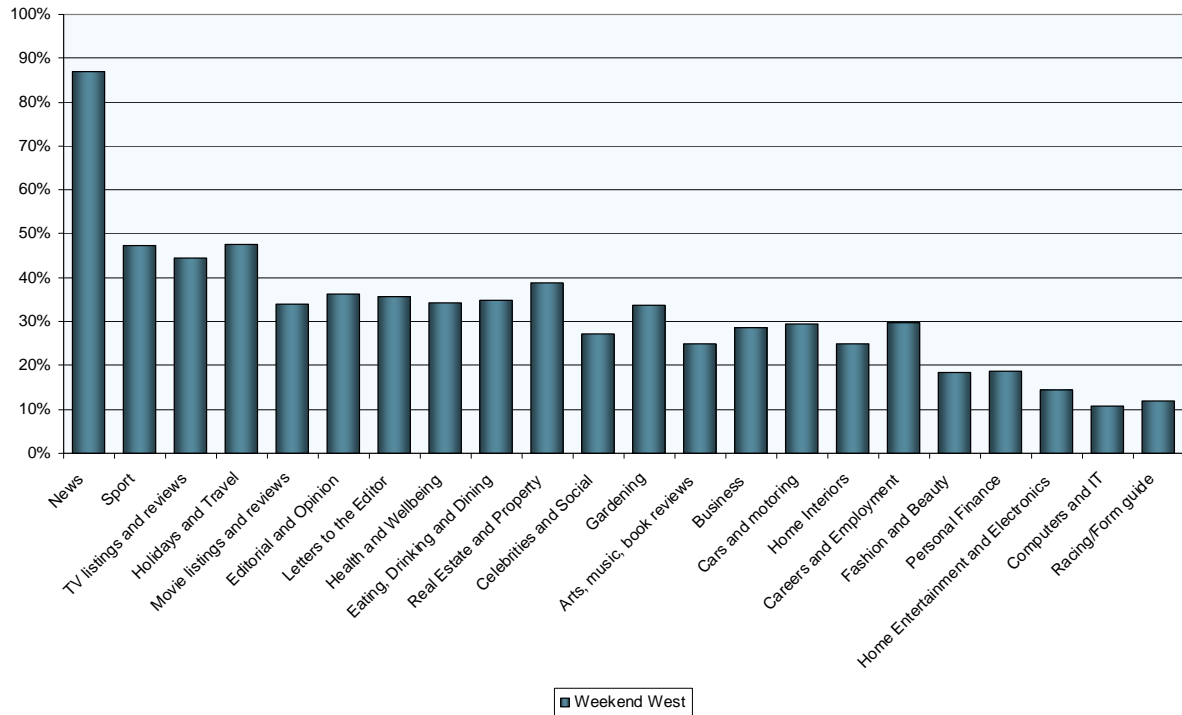
## Sunday Mail (SA) sectional reading



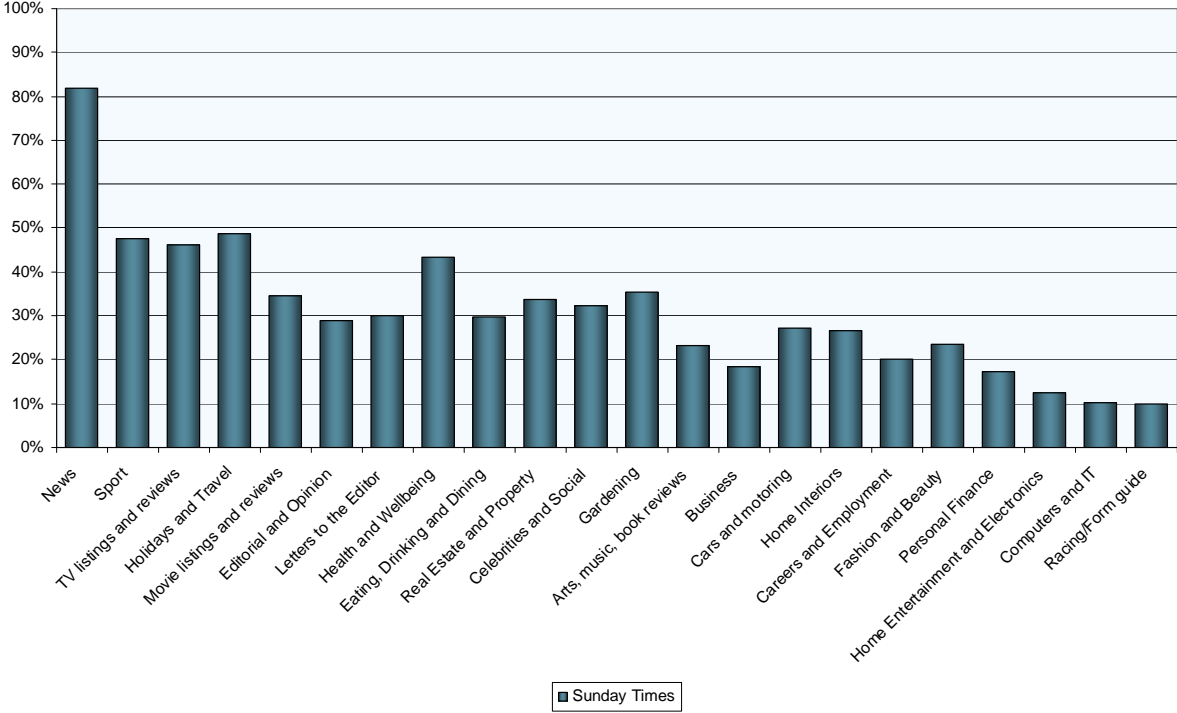
## West Australian M-F sectional reading



## Weekend West sectional reading



# Sunday Times sectional reading



## DATA APPLICATION EXAMPLES

### Profiles by sections, e.g. *Weekend Australian* - Arts, music, book reviews

If we wish to understand more about the readers of a specific newspaper section, this can be shown quite easily by a simple cross-tabulation analysis or through profiler in ASTEROID.

For example, a simple comparison of readers of the **Weekend Australian** compared to the population 14+ by various consumer profiles is shown below. When you include the comparative incidence of the different audiences among Arts, music, book reviews in the **Weekend Australian** you see that they deliver even higher proportions of these desirable groups.

Consumer Profile	Percentage of population 14+	Percentage of <u>all Weekend Australian</u> readers	Percentage of all Weekend Australian readers who read <i>Arts, music, book reviews</i>
Socially Aware	16%	38%	51%
AB Quintile	21%	43%	50%
Diploma/Degree	37%	62%	69%
Main Income Earner \$70K+	29%	46%	52%
Big Spenders	33%	50%	54%
Women	51%	50%	60%

Categories such as women, that might otherwise appear as under-represented, in fact **Weekend Australian** are over-represented for the *Arts, music book review* section.

While readers of the **Weekend Australian** are more likely to be Socially Aware or AB Quintile – readers of the *Arts, music, book reviews* have an even higher propensity to be so.

### Profile by target audience

Alternatively, once the user has identified the target audience to whom they wish to advertise, the next step can be to identify which newspaper sections are most relevant to that audience.

For example, *Male Big Spenders* in NSW might be our target audience.

Having first selected the particular newspaper that is believed to be most appropriate to your target audience you could then analyse which topics within that title they read most. So for instance, if we look at the **SMH Saturday**, the highest ranking sections by audience reach are as follows:

	Reach ('000's)	Index
<i>News</i>	247	104
<i>Sport</i>	179	156
<i>Editorial and Opinion</i>	115	93
<i>Business</i>	114	142
<i>Holidays and Travel</i>	106	85
<i>Movie Listings and Reviews</i>	98	83
<i>Real Estate and Property</i>	97	109
<i>Arts, Music, Book Reviews</i>	95	76
<i>TV Listings and Reviews</i>	90	83
<i>Letters to the Editor</i>	87	85

Naturally, the larger audience sections predominate. However, if you were looking for hidden opportunities, you might look for undervalued parts of the paper which have a higher propensity for our target audience. Ranking the sections by index delivers a different list. The ideal may involve a combination of the two methods.

If these decisions are made 'upstream' of the buying process new kinds of leverage can be achieved.

The highest indexing topics among *Men Big Spenders* are:

	Reach ('000's)	Index
<i>Cars and Motoring</i>	86	173
<i>Racing/Form Guide</i>	31	160
<i>Sport</i>	179	156
<i>Business</i>	114	142
<i>Computers and IT</i>	39	136
<i>Personal Finance</i>	67	129
<i>Home Entertainment and Electronics</i>	32	123
<i>Real Estate and Property</i>	97	109
<i>Careers and Employment</i>	45	105
<i>News</i>	247	104

## SECTIONAL READER ENGAGEMENT

The main purpose of measuring sectional reading is to establish the size and nature of the audience of different parts of the newspaper.

However, taking this further, we have added extra measures which demonstrate the level of involvement, enjoyment and (combining these two) engagement of readers of each section.

### **Involvement:**

- Especially choose to read this topic/section
- Interested and read when I have time
- Only read if something grabs my attention

### **Enjoyment:**

- Really enjoy this topic/section

Tables can be produced from ASTEROID that allow you to see these components of engagement, i.e. *to what degree* the sections of a newspaper are involving and enjoyed by the readers of those sections.

### **Engagement:**

By combining involvement and engagement and scoring them for all readers of each section you arrive at an Engagement Score for each section

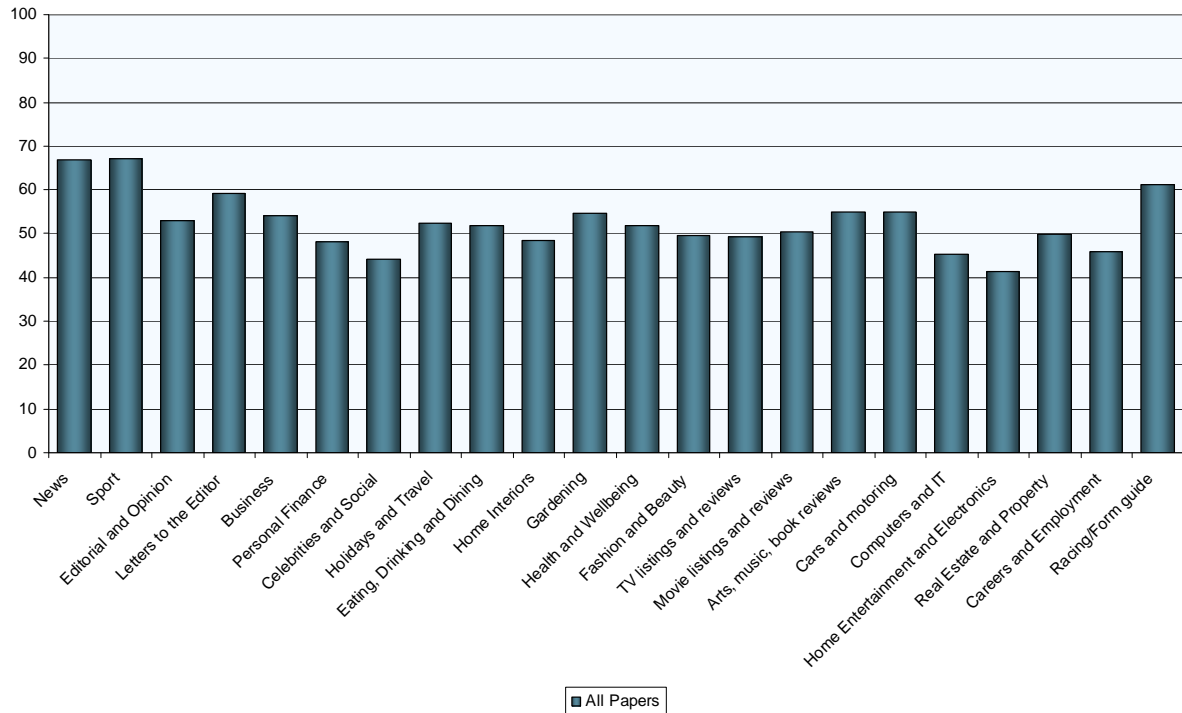
It is important to note that the engagement score is independent of the size of the section audience. A small section may have a higher engagement score and a large section a lower score - or the other way round. The maximum engagement score is 100.

Looking at the engagement score by different target audiences produces a greater range of scores (from high to low).

Looking at individual mastheads reveals different relativities in section reader audience involvement, enjoyment and engagement - as you would expect.

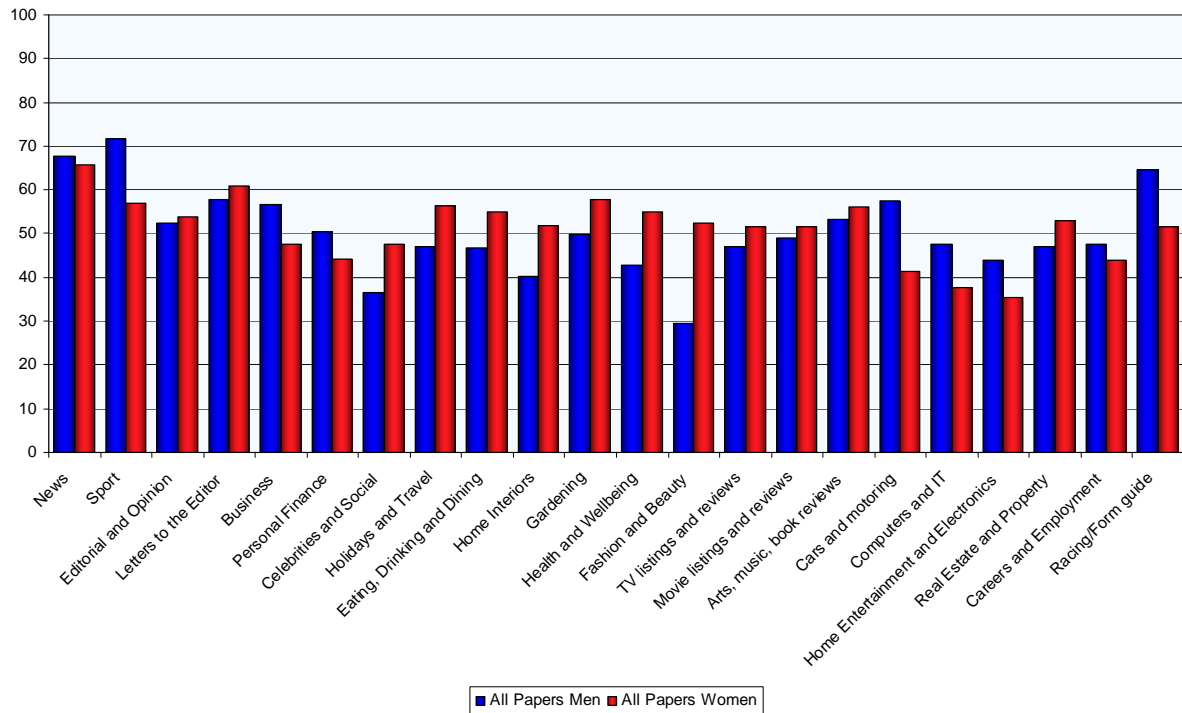
Involvement degree, enjoyment level or engagement scores can all be used to complement sectional reading for individual mastheads, to find additional angles or other hidden opportunities to support target audience choice or for editorial purposes.

## Sectional Reader Engagement Scores - all papers



The chart above shows that there is a much smaller variation in engagement scores overall than in sectional reading audience numbers. However, once this is broken out by target audience, the range of scores increases - as seen in the simple split of men and women in the following chart.

## Sectional Reader Engagement Scores - Men vs Women



Using the full range of sectional reading and engagement measures allows a depth of understanding of the different subjects of interest that newspapers provide and the manner in which their audiences engage with them.

## Engagement Score components Courier Mail Saturday

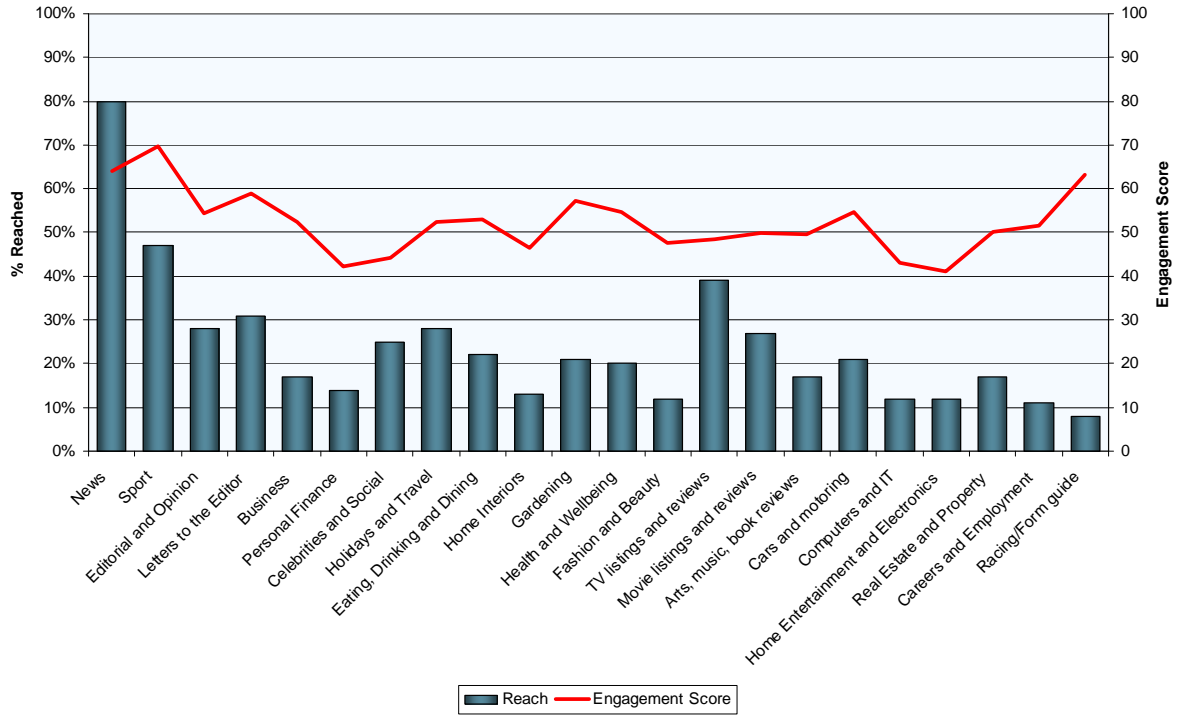
COURIER MAIL (SAT)							
	Sectional Reading	Especially choose to read	Interested and read when I have time	Only read if something grabs my attention	Really enjoy reading	Engagement Score	
(unweighted)	13526	13526	13526	13526	13526	13526	
(POPN '000)	18460	18460	18460	18460	18460	18460	
	100%	100%	100%	100%	100%	100%	
<b>SUMMARY GRID - SECTIONAL READER ENGAGEMENT - COURIER-MAIL (SAT)</b>	wc	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 reviews	269	34%	51%	27%	21%	27%	49
Movie listings and reviews	278	35%	43%	33%	23%	30%	50
Arts, music, book reviews	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

Roy Morgan Research Ltd., Melbourne, Australia

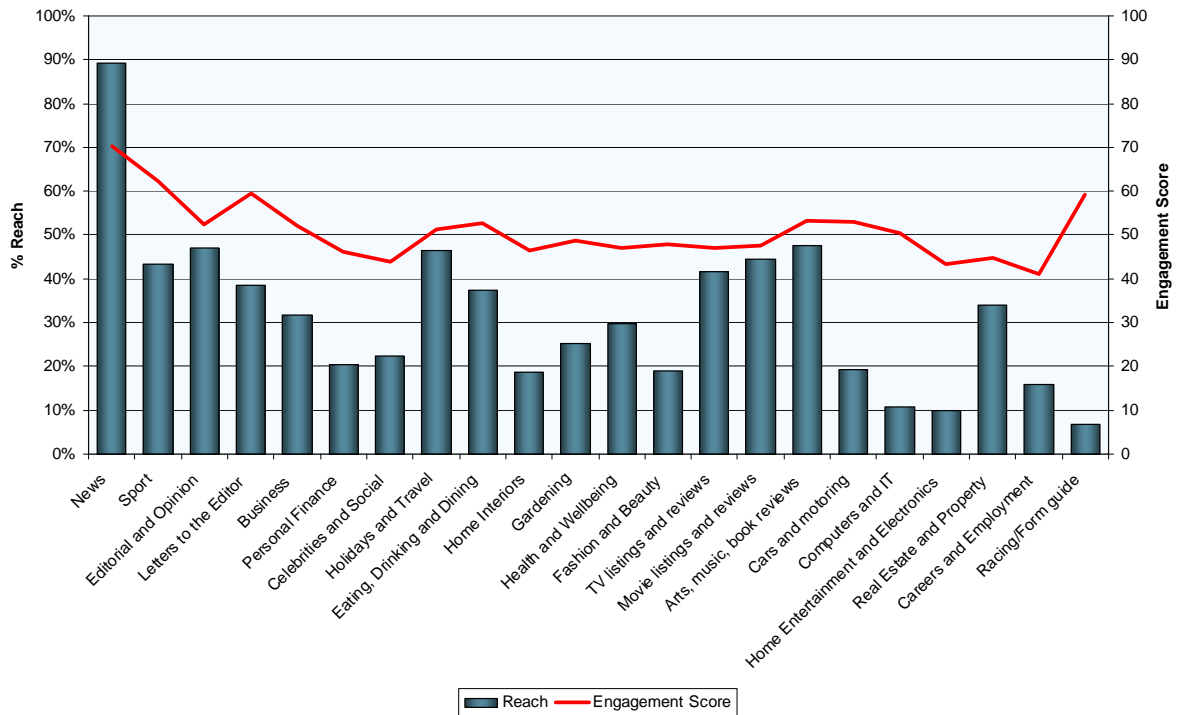


Again, as with the two examples below, we can present a comparison of sectional reading with engagement scores to see - with new eyes - where opportunities, previously unforeseen, exist.

### Herald Sun M-F - Sectional Reading vs Engagement Scores



### SMH Sat - Sectional Reading vs Engagement Scores



We have only scratched the surface in what has been shown in this report.

With the flexibility of ASTEROID software and the extensive integrated data of Roy Morgan Single Source, many new and valuable aspects of newspapers are there for the discovery.

Our only caution is to take care with the interpretation of results from smaller samples. Above 100 is comfortable; below 50, data should be seen as indicative rather than prescriptive.

We look forward to working with our clients – advertisers, media and agencies on this exciting project.

A handwritten signature in blue ink that reads "Michele Levine". The signature is written in a cursive, flowing style.

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