

SenseMakerReport

Across Platforms, 7 in 10 Adults Access Content From Newspaper Media Each Week

Audience includes majority of 18-24 year olds; mobile use up sharply

Prepared by the Newspaper Association of America

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EXECUTIVE SUMMARY

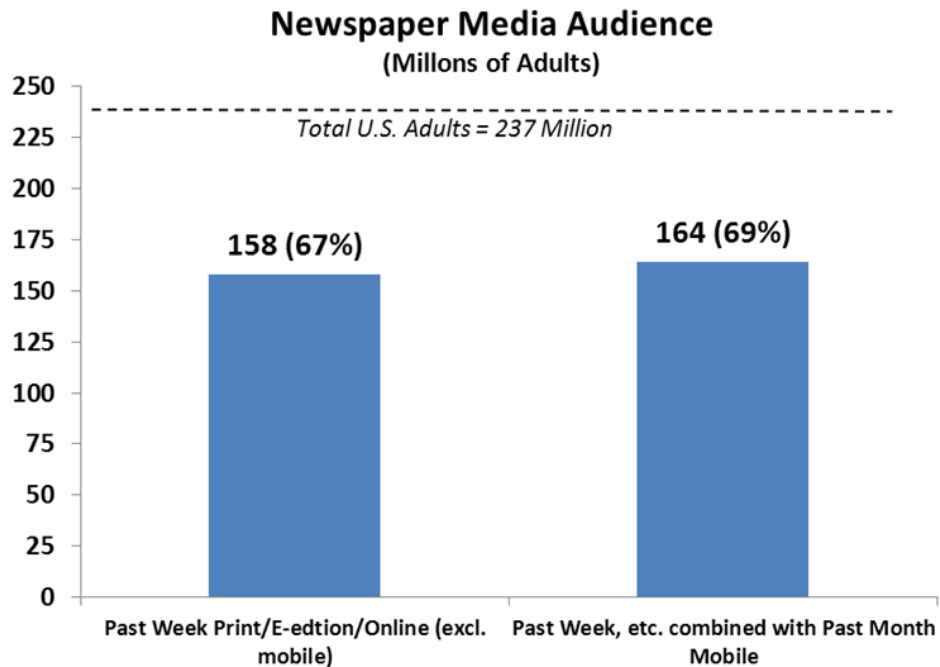
Media consumption trends continue to change rapidly, particularly by the increase today in mobile technology use. This SenseMaker Report by the Newspaper Association of America assesses the latest data on consumption from Scarborough Research, which surveys some 206,000 U.S. adults. Scarborough's extensive population allows researchers to look at the audience of different media sources across platforms.

- The vast majority of U.S. adults, 164 million (69%), read newspaper media content in print or online in a typical week, or access it on mobile devices in a typical month.
- The majority (59%) of young adults, ages 18-24, read newspaper media content in print or online in a typical week, or access it on mobile devices in a typical month.
- The mobile newspaper audience is growing fast; up 58% in an average month in 2012 compared with 2011. That totals 34 million adults.
- The mobile audience skews young; the median age of an adult newspaper mobile user is 17 years younger than the print reader.
- Those who are newspaper mobile-exclusive—that is, those who access newspaper content on mobile devices only—are younger by four more years (with a median adult age of 33). That audience grew 83% in 2012 compared with a year ago.
- Overall, the total newspaper media audience in a typical week (excluding mobile) dipped 2% in 2012 from 2011, a change in line with television media and less than radio. When the mobile audience is included, through data that are collected monthly, the decline in total newspaper audience is cut by more than half to less than 1%.

These data points do not reflect the spike in sales for mobile devices in the past six months. It is likely that when new Scarborough data become available later in the year, the mobile component of the newspaper media audience will show continued growth.

The vast majority of U.S. adults read newspaper media content across a range of technology platforms, according to an analysis of the newest data on media usage from Scarborough Research—including 59% of Americans ages 18-24, the youngest cohort of adults, a group that many are skeptical ever think about newspaper content.

Fully 69% of Americans—or more than 164 million adults in the United States—access newspaper media content in print or online during a typical week or on mobile devices during a typical month, according to the survey of some 206,000 U.S. adults collected by Scarborough Research.¹

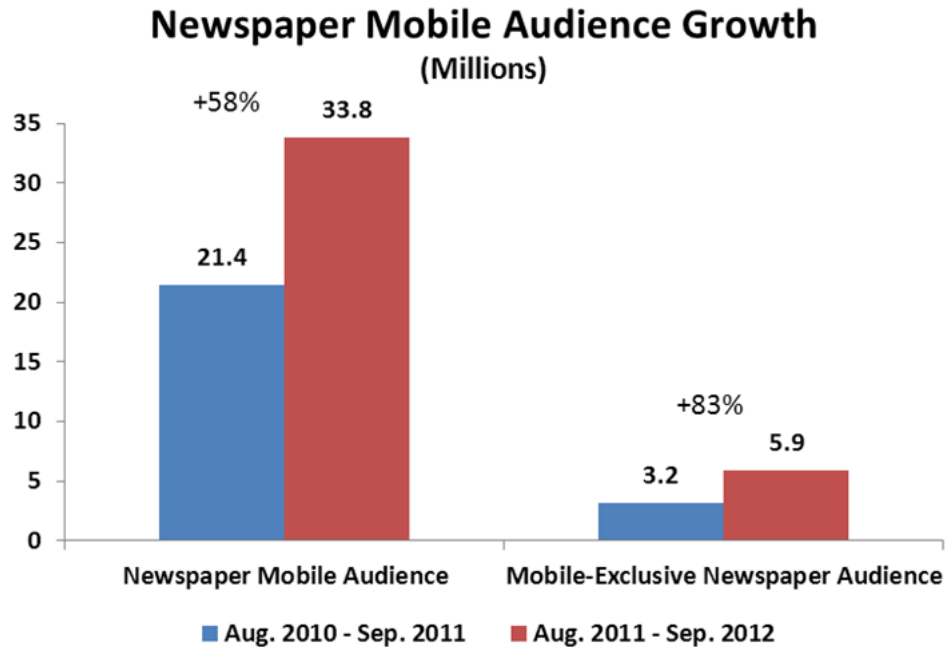


That number is being positively influenced by a rapid growth in people using mobile technology for news. According to the available monthly data, nearly 34 million adults accessed content from newspaper sources on tablets and smartphones in a typical month. That is an increase in mobile audience of 58% from the same period a year earlier.

A significant number of these mobile users, more than 17% of them, are “mobile only”—meaning they access newspaper content exclusively on mobile devices. That translates into nearly 6 million adult Americans who are mobile-only newspaper users and constitutes a significant new audience group.² Without mobile users included, 67% of U.S. adults, or 158 million, read content from newspaper media in a typical week.

¹ Currently, Scarborough collects mobile usage data on a 30-day basis while Web and print consumption are measured on a more frequent basis. Scarborough has plans to capture mobile on a more frequent basis in the future.

² Numbers are rounded.



To get a sense of the impact of mobile, consider the following. In print and on conventional computers, the audience for newspaper content during a typical week slipped 2% from a year earlier—a trend similar to other traditional media. Yet when the change in monthly mobile audiences is included, that decline is cut to less than 1%.

These are among the findings of an analysis of Scarborough data conducted by researchers at the Newspaper Association of America. The most recent Scarborough data are based on interviews conducted on a rolling basis from August 2011 through September 2012.³

One value of the Scarborough dataset is it allows a more contemporary assessment of media consumption than some traditional metrics, such as print circulation or television ratings. These traditional metrics tend to measure platforms or delivery systems in isolation, which makes it difficult to fully understand changing audience patterns. It is hard to know with any confidence, for instance, the audience for a media source or sector across different devices or technology platforms. To identify these more accurate shifts in media usage, it is necessary to get a sense of “total audience” across devices. The Scarborough data, which involve surveys of very large populations over time, provide a chance for this deeper analysis of audience and a way to assess the audience by sector as well as delivery platform.

For all the financial challenges facing newspaper and other incumbent media, the data reveal the extent to which more of this disruption reflects change in revenue rather than similar declines in the demand for the content.

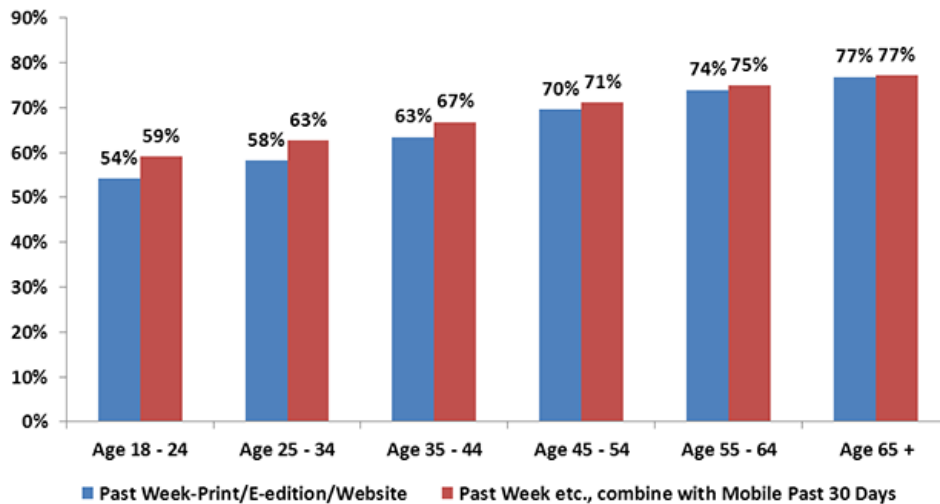
While some may imagine that young people never read the newspaper, the empirical data tell a different story. The print audience for newspaper content does skew older; the median age of the newspaper reader is 54, about the same as the audience for local television news.

³ Scarborough Research, Release 2, 2012, USA+ database.

Yet a majority of the youngest group of adults, those ages 18-24, also read newspaper content at least weekly.

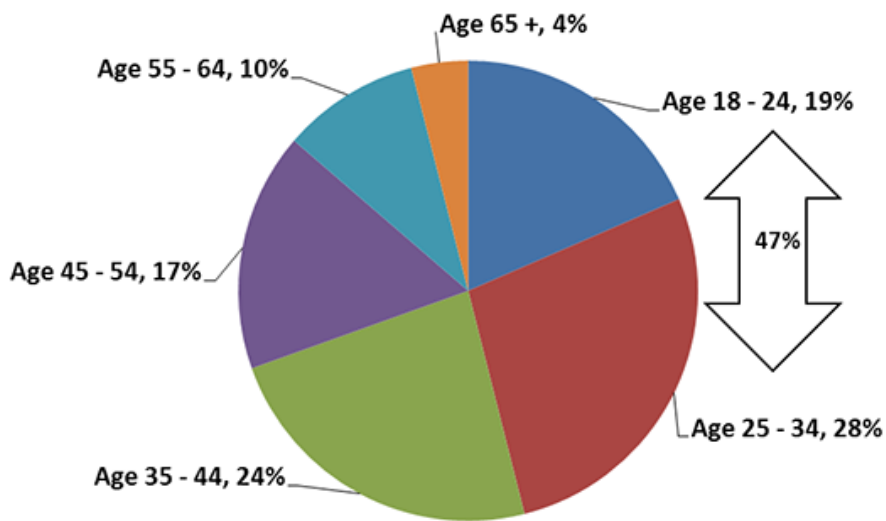
That younger audience, moreover, is being increased by the growth in mobile—that population connected to the Internet by either smartphones or tablets. For instance, 54% of adults 18-24 consume newspaper content in print or on conventional computers, according to the Scarborough data. When combined with the audience for that same group who uses smartphones or tablets exclusively to connect with newspaper content in an average month, the 18-to-24 audience rises to almost 6 in 10 (59%).

Newspaper Media Audience Readership by Age Group



To get a sense of just how much the rise in mobile may impact the age of media users, consider that almost half (47%) of the newspaper mobile-exclusive audience is age 18-34. Only 4% is 65 or older.

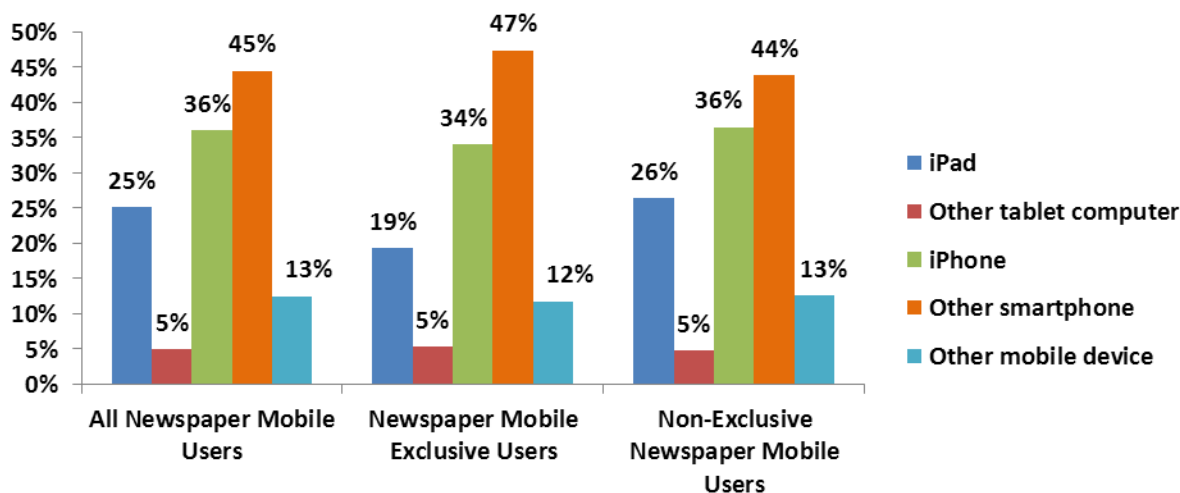
Age Composition of Mobile-Exclusive Newspaper Audience



These mobile newspaper users look like the mobile population generally when it comes to device ownership. Roughly half own smartphones that employ technology other than Apple iOS. Android phone technology by Google is the most popular of the non-Apple platforms. More than a third of smartphone newspaper users own iPhones. And among those who access newspaper content on tablets, the Apple iPad is about four to five times more popular than alternative brands.

This snapshot of mobile technology device ownership is from the period ending in September 2012. It does not reflect the additional mobile device sales that occurred over the holiday period. Data by Pew Research, for instance, suggest that tablet ownership rose by almost a quarter, from 25% of Americans owning a tablet to 31% by January 2013. So there may be every reason to suspect that mobile audiences are only continuing to rise—even if the next cohort of buyers are not as avid news consumers as the current group.

Composon of Newspaper Mobile Users by Device Type



The Scarborough data also suggest that so far owners of Apple devices are particularly likely to be news consumers. From 2011 to 2012, among those who access newspaper content on mobile devices, the use of iPads has more than doubled (+151%), and iPhones grew at the second-fastest rate (+85%).

| | Millions of Adults | | |
|---|--------------------|-------------|-------------|
| | 8/10–9/11 | 8/11–9/12 | % Change |
| Used Mobile Device for Newspaper Content, Past Month | 21.4 | 33.8 | +58% |
| DEVICE TYPE | | | |
| Other Smartphone | 10.3 | 15.0 | +46% |
| iPhone | 6.6 | 12.2 | +85% |
| iPad | 3.4 | 8.5 | +151% |
| Other Mobile Device | 4.1 | 4.2 | +4% |
| Other Tablet Computer | NA | 1.7 | NA |

Note: Numbers do not add as some own more than one mobile device

While the Internet has posed a challenge to newspaper economics, the Scarborough data reveal that even before the advent of mobile, the Internet had likely significantly extended the reach of newspaper media and other legacy media sources to younger age groups.⁴

The median⁵ age of print newspaper readers, for instance, is 54. That is almost identical to the median age of those who watch local TV evening news (53) or watch national/network news (53).

The median age of the online newspaper media audience, by contrast, is 43 years old. That is also the median age of adults using the Internet for any purpose during the past month.

Mobile device ownership is even younger. The median age of those who own a smartphone or tablet computer is 38. And the median age of those who have used a mobile device to access newspaper content in a typical month is 37; those who are “newspaper mobile exclusive,” meaning they have accessed newspapers only on mobile devices, are even younger with a median age of 33. The median age of those who used Twitter in the past month is similar, 32.

| Median Adult Age of Consumers by Media Consumption | Median Adult Age |
|--|-------------------------|
| Pure Newspaper Print Past Week (No Newspaper Online Past Week or Newspaper Mobile Past Month) | 54 |
| Typically Watch Local Evening TV News | 53 |
| Typically Watch National/Network TV News | 53 |
| Past Week – Newspaper Print/E-Edition/Website | 50 |
| Typically Watch Late Local TV News | 49 |
| Past Week Newspaper Print/Online or Newspaper Mobile Past Month | 49 |
| Scarborough Survey Respondent (Age 18+) | 47 |
| Any Internet Access – Past Month | 43 |
| Any Newspaper Website – Past Month | 43 |
| Any Broadcast TV Website – Past Month | 41 |
| Any Radio Station Website – Past Month | 39 |
| Facebook – Past Month | 39 |
| Currently Own Mobile Device | 38 |
| Newspaper Mobile – Past Month | 37 |
| Newspaper Mobile Exclusive – Past Month | 33 |
| Twitter – Past Month | 32 |

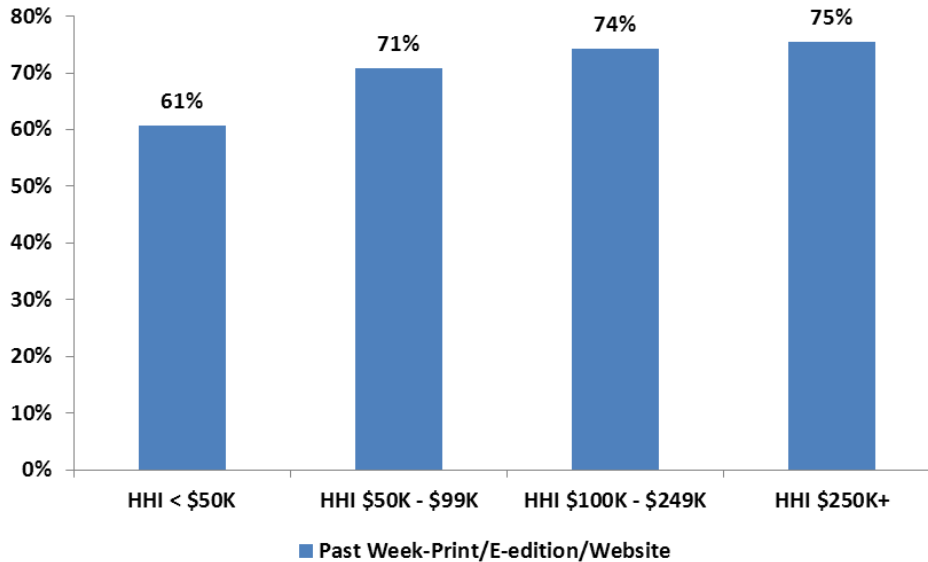
The new data confirm that some long-term trends about newspaper media audiences remain true. For instance, adults in high-income households continue to be more likely to engage with newspaper media. Three quarters of U.S. adults with incomes above \$100,000 consume newspaper

⁴ This is the median age for all adults, age 18 and over. The Census Bureau calculated the median age for the entire U.S. resident population, including those below age 18, at 37 in 2011.

⁵ A median is the midpoint in the data, where half the values are above the median point and the other half below that point.

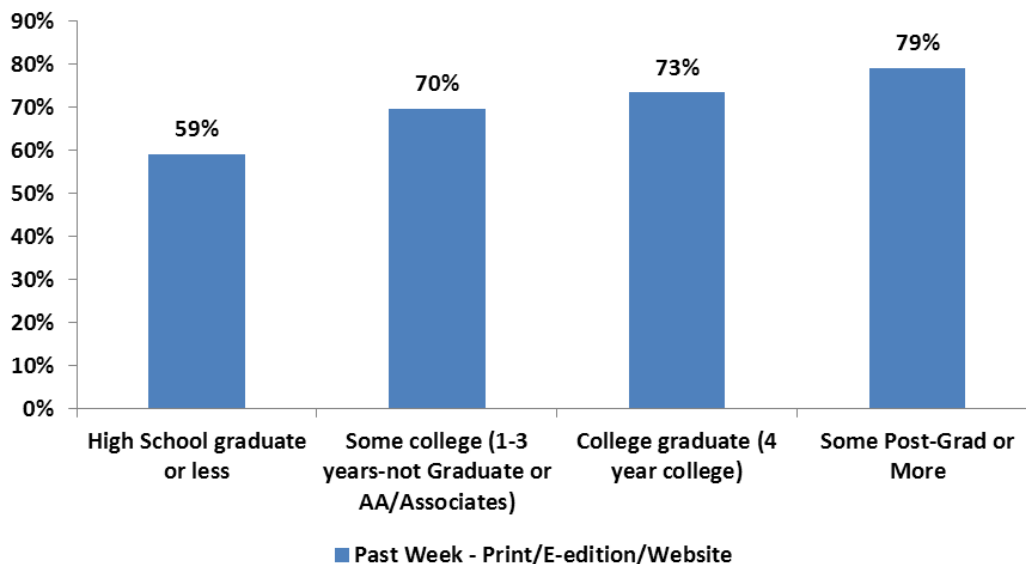
content, compared with 71% of those earning \$51,000 to \$100,000 and 67% of U.S. adults generally. (The median U.S. annual household income is \$51,000.)

Newspaper Audience by Household Income



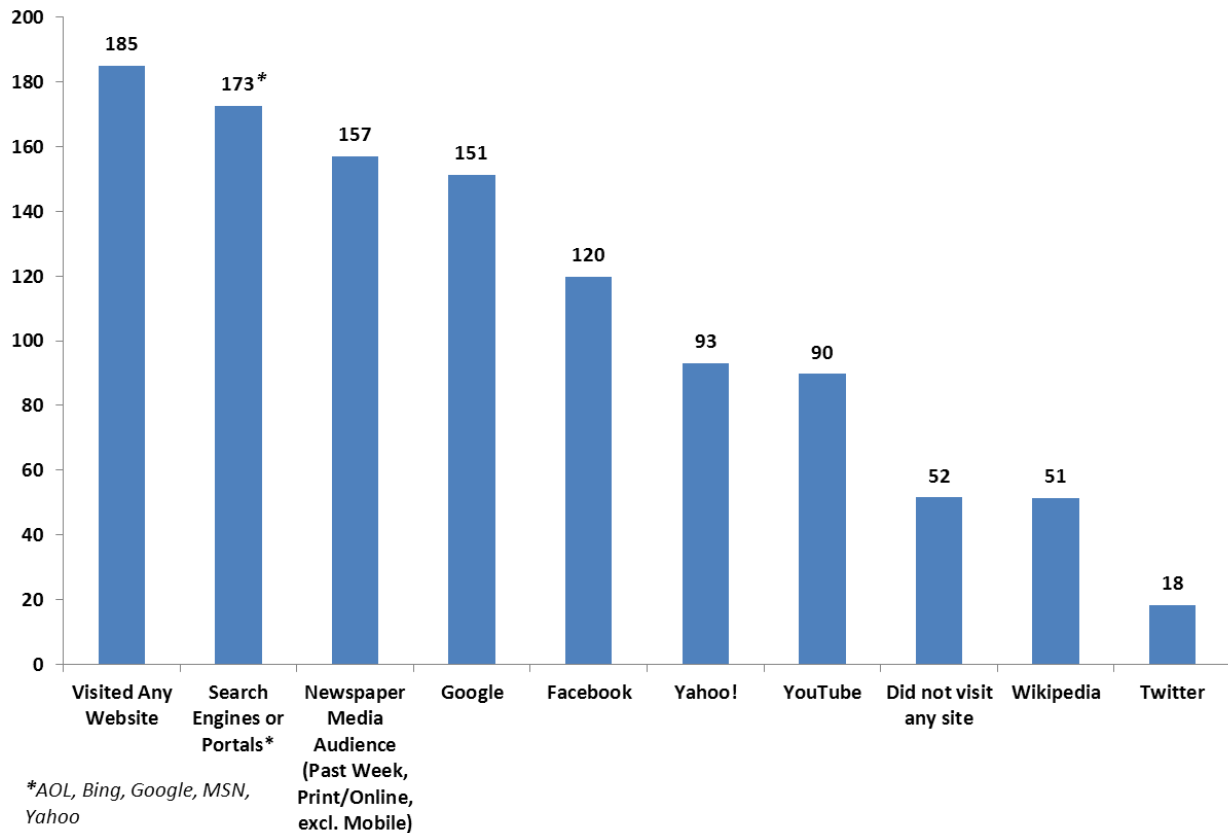
The new data also continue to show that the newspaper audience across platforms tends to be more highly educated than the population overall. While 67% of all adults consume newspaper content in a typical week, the number is 79% among those who have some level of graduate education, and 73% who have a four-year college degree.

Newspaper Audience by Education Level



To put these numbers in perspective, on a weekly basis the combined audience for newspaper content, according to the data, compares favorably to the monthly audience for some of the country’s most popular digital destinations. For instance, the audience for newspaper content in print and online each week is larger than the audience over the course of a month for Google, Facebook, Yahoo, YouTube, and others, according to the data.

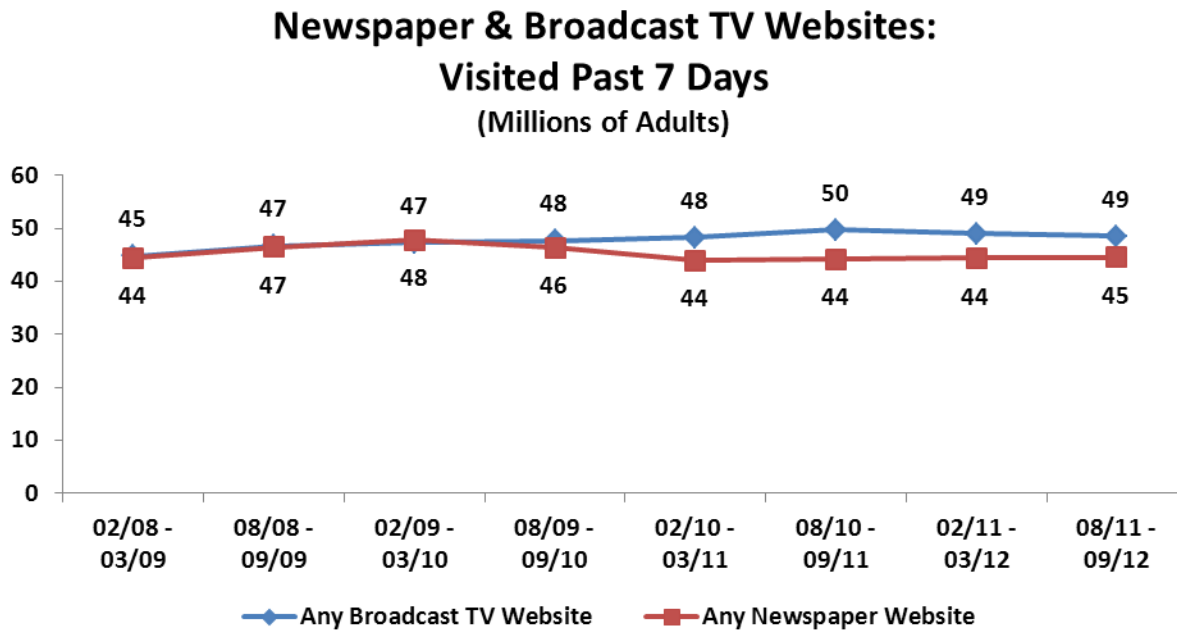
**Newspaper Media Audience (Past Week)
vs. Selected Internet Sites (Past Month)**
Millions of Adults



Note: Scarborough releases twice yearly on a rolling 12-month basis. The above covers Aug. 2011 – Sept. 2012.

Some comparisons of online media consumption are complicated to make directly. For instance, the Scarborough interview questionnaire asks the respondent about visiting broadcast television websites without distinguishing whether the respondent is viewing news or other content. This means that the Web audience for broadcast television channels online includes people watching entertainment programming, as well as those who might be accessing news.

Even with those problems, the trend lines of newspaper audiences online and television audiences look relatively similar.



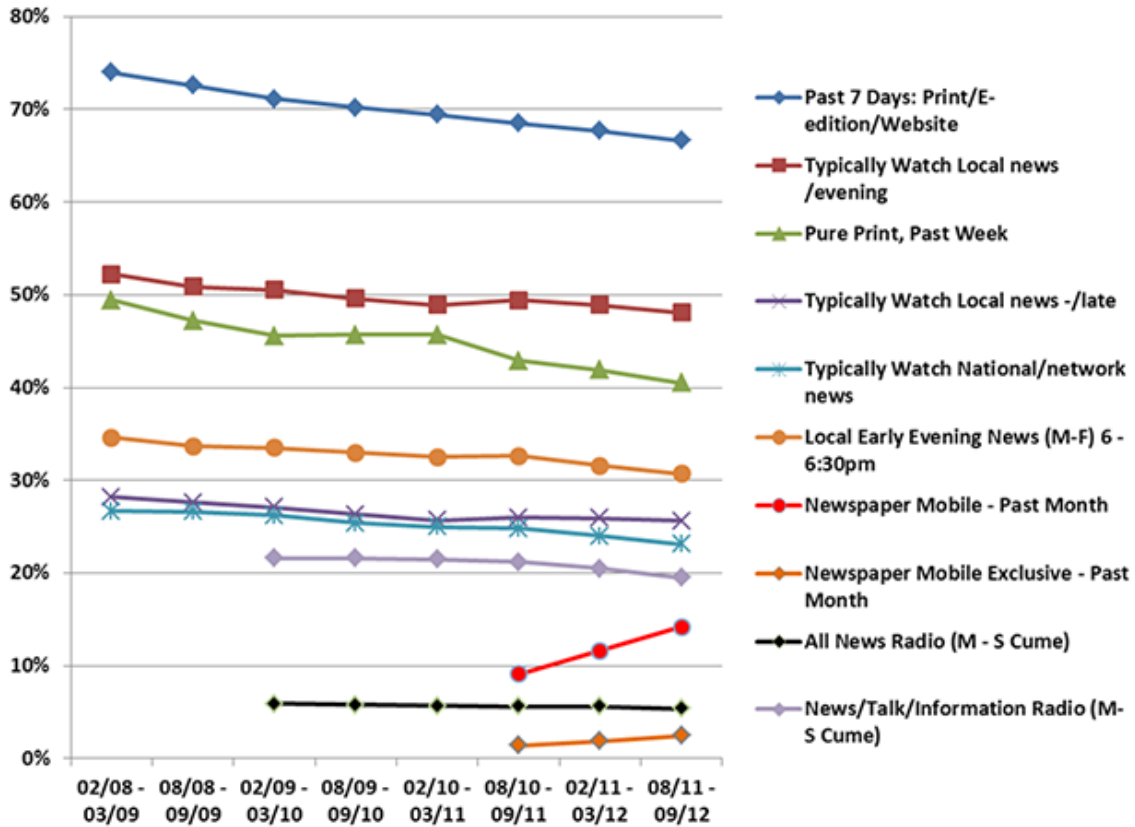
Note: Scarborough releases twice yearly on a rolling 12-month basis.

These trend lines overlapped in 2008 and 2009; a slight gap favoring broadcast TV websites developed during 2010; the gap shrank in the most recent measurement periods, which captured the fall period between 2011 and 2012.

Even with new platforms extending their reach, most media sources are seeing long-term declines in total audience, though the full impact of the rise in mobile is yet to be comprehensively measured across platforms over time. The trend line for newspaper media audience each week is moving in a direction similar to that for the television and radio audiences.

In other words, this broader dataset about audience suggests that most media sectors are being disrupted in similar ways. And, while new devices are likely diversifying and making the audience younger than it would have been in older delivery systems, the fact that consumers have more choices for how to spend time is impacting all media producers. Simply put, there is more competition for the one thing that is inelastic—audience time.

Recent Audience Trends
(% of Total Adults)



Note: Scarborough releases twice yearly on a rolling 12-month basis.

These trend lines also reveal just how striking the relatively sudden emergence of mobile could be moving forward. The smartphone is less than 6 years old and the tablet 3. In the chart above, one can see a variety of news audiences across various platforms—including on computers. All of them tend to be trending downward with the exception of mobile, which in some cases is increasing sharply. For instance, the monthly newspaper mobile audience in total could, if it continues at a similar growth rate, surpass the audience for radio news/talk/information and all-news radio.

The numbers also reveal the degree to which the nature of media consumption has shifted from something that varies little from day to day to something more varied as consumers have more choices. Traditional media measurements often tracked consumption “yesterday” on the assumption that people did the same thing most days. There is some evidence that these long-held daily numbers are less meaningful than they once were. Digital technology gives users the power to adapt their media consumption to fit their behavior rather than the other way around.

For instance, the next chart reveals how newspaper audiences are shifting behavior not only across platforms but to some degree in frequency as well. The audience for the print newspaper on the average weekday, for instance, fell 5% year to year. The average audience for the Sunday print newspaper fell less, by 2%. Newspaper websites (not including the mobile audience) rose 5% on a yesterday basis and 1% on a past-week basis.

The numbers for television and radio are somewhat less positive because the Internet is not compensating for losses in legacy platforms as much. The numbers for “typically watch” national/network news TV fell 6%, weekly news/talk/information radio was down 8% and radio websites on a monthly basis fell 9%.

The biggest growth was occurring online in social media. Certainly people appeared to be online more often. Those who did not access the Internet in the past month dropped by 14%, while those who reported any access increased 5%. Search or portals noted a modest 4% gain.

The biggest growth was occurring in social media. The percentage of people who said they accessed Facebook in the last month grew 13%. The number who visited Twitter grew 43%.

Change in Media Audiences, 08/11-09/12 vs. 08/10-09/11

| | % Change |
|---|----------|
| NEWSPAPERS | |
| Average Issue – Daily Print | -5% |
| Newspaper Print or Web – Yesterday | -4% |
| Newspaper Website – Yesterday | +5% |
| Average Issue – Sunday Print | -2% |
| Newspaper Print – Past Week | -3% |
| Newspaper Website – Past Week | +1% |
| Past Week: Print/E-Edition/Website | -2% |
| Past Week: Print/E-Edition/Website or Mobile Past Month | -1% |
| TELEVISION | |
| Any Broadcast TV Viewing – Past Week | -1% |
| Any Broadcast TV Website – Past Week | -2% |
| Typically Watch National/Network News | -6% |
| Typically Watch Local Evening News | -2% |
| Typically Watch Late Evening News | -1% |
| RADIO | |
| All News (M-S 6 a.m.-Mid cume) | -3% |
| News/Talk/Info (M-S 6 a.m.-Mid cume) | -8% |
| Any Radio Website – Past Month | -9% |

Chart continues on following page

Change in Media Audiences, 08/11-09/12 vs. 08/10-09/11

Continued from previous page

| | % Change |
|------------------------------|----------|
| INTERNET (Past Month) | |
| Any Internet Access | +5% |
| Did Not Visit Any Site | -14% |
| Search or Portals | +4% |
| Google | +5% |
| Yahoo! | > +1% |
| Facebook | +13% |
| Twitter | +43% |
| Wikipedia | +7% |

The rise in social media, however, renews the challenge for researchers in trying to understand where people are getting their news and information from—as opposed to where they are going to find it. Twitter and Facebook are delivery platforms. They are not sources.

Getting a consumer to recall which links on these platforms they are accessing—how often they are news and from what news sector they originated, becomes increasingly difficult.

See more detailed data on the [newspaper media audience](#) from NAA.

A note on methodology: [Scarborough Research data collection methods](#)