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NAA POLITICAL STUDY

NEWSPAPERS' ROLE IN THE LOCAL POLITICAL LANDSCAPE

 **NEWSPAPER ASSOCIATION
OF AMERICA**

April 2016

STUDY OBJECTIVES

- 1 Demonstrate the importance of local newspapers and their associated websites in the political process. How do residents use their local community's media resources for political information and voting decisions?
- 2 Do local newspapers have a strong impact on Opinion Leaders? How much is newspaper communication magnified by this two-step flow of subsequent influence among family and friends?
- 3 How do the various media compare with respect to trust, depth of coverage, and media influence?

STUDY METHODOLOGY

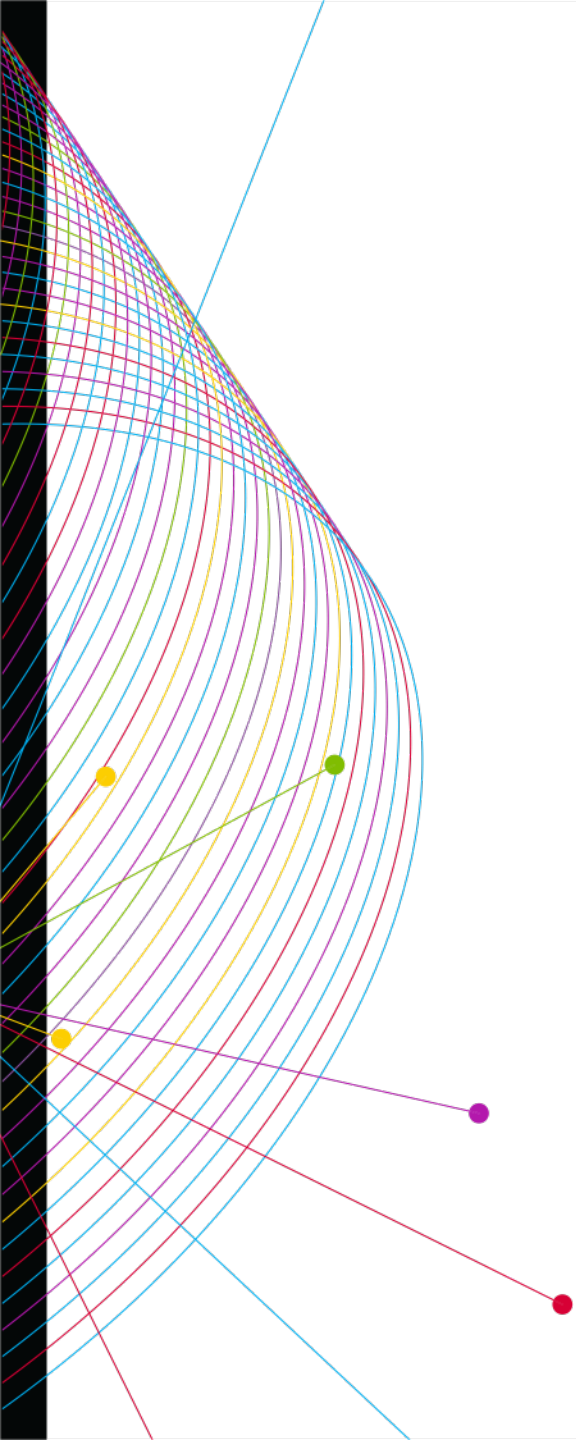
- A total of 1,015 interviews were conducted in the following strata:

Strata	Census region	Phone interviews	Online interviews	Total interviews
1	Midwest	42	176	218
2	Northeast	31	152	183
3	South	55	312	367
4	West	35	211	247

- Phone interviews were conducted to reach those without Internet access; online interviews were used to reach those who have Internet access.
- This survey represents English-speaking **registered voters** over the age of 18.
- Survey tolerance with 1,000 interviews is plus/minus 3%.

SUMMARY OF KEY FINDINGS

- Newspapers provide powerful **non-fragmented** reach of registered voters.
- Newspaper reach is augmented significantly by their websites and news apps.
- Newspaper political advertising is an efficient advertising buy with its strongest reach concentrated among those most likely to vote.
- Newspapers are particularly strong at reaching:
 - ▶ Opinion Leaders who voraciously consume newspaper content and transmit their influence by discussing politics with their less-knowledgeable friends. Opinion leaders are **twice as likely** as others to read political newspaper advertising.
 - ▶ Voters who are especially interested in news and events of their local community.
 - ▶ Liberal AND Conservative voters. Local newspapers are generally in-step with their local communities.
 - ▶ Those who make up their minds three or more weeks before the election.
- Newspapers exceed or meet the strength of other forms of advertising on nearly every measure.

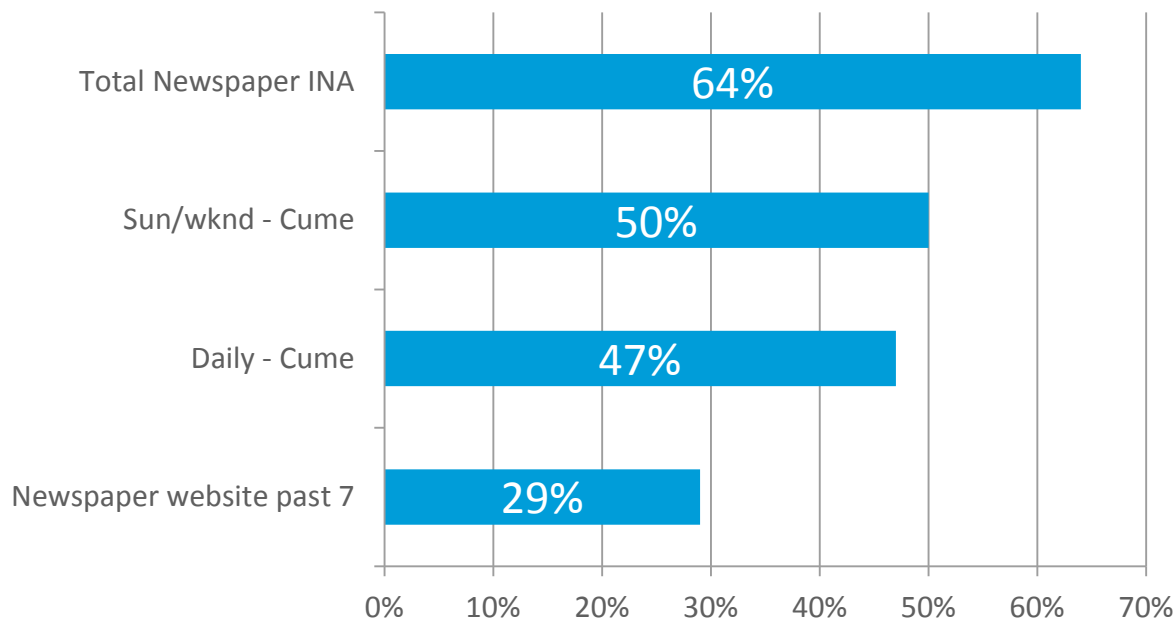


NEWSPAPER MEDIA REACH REGISTERED VOTERS

NEWSPAPERS' INTEGRATED AUDIENCE REACHES 64% OF REGISTERED VOTERS EVERY WEEK

Local newspapers show considerable reach among voters with the power to connect to an audience of **122 million voters**. The combination of daily, Sunday, and websites reach 64% of voters over a seven-day period.

Local newspaper reach



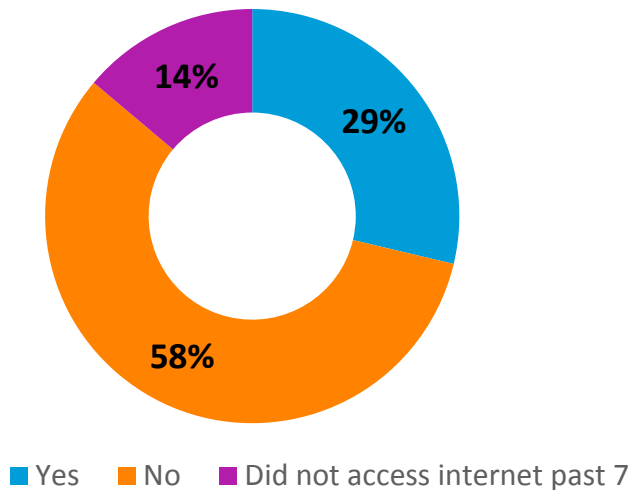
Source = NAA R1 2015

NAA INA = Any Daily print CUME; Any Sunday/weekend print AVERAGE ISSUE; Any newspaper website past 7 days

WEBSITE VISITS ARE AN IMPORTANT PART OF NEWSPAPER VOTER REACH

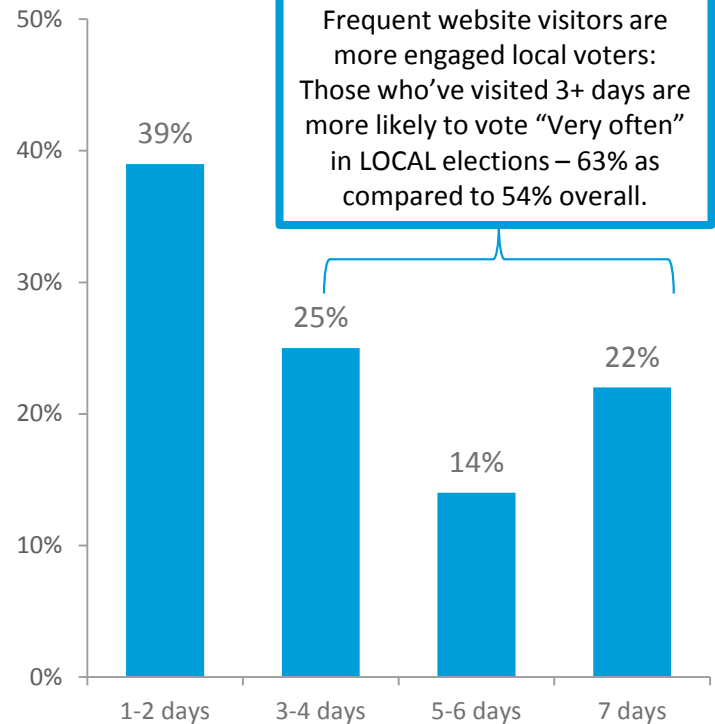
Fully 29% of voters report visiting their local newspaper’s website. Newspaper website visitors visit an average of 3.7 visits per week.

Visited newspaper website past 7 days



Base: Total respondents
Q11: In the past 7 days, have you accessed a website sponsored by a local newspaper?

Days visited in past week

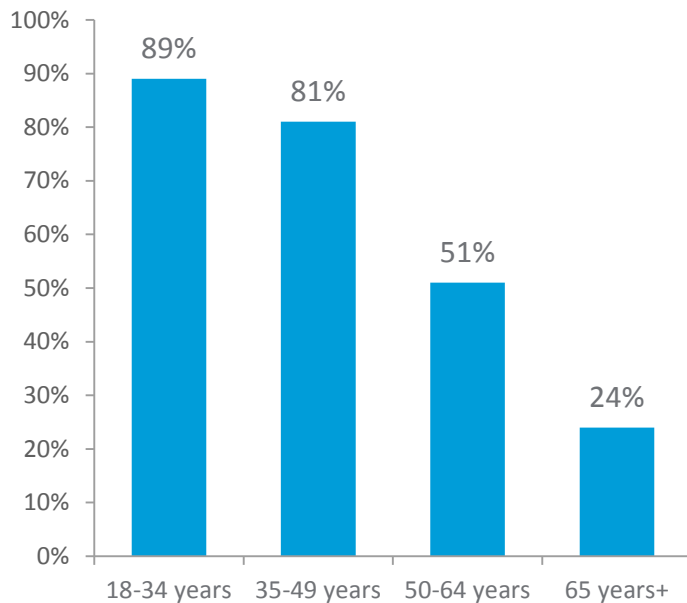


Base: Visited newspaper website past 7 days
Q12: How many days out of the past 7 days have you accessed a newspaper website?

OVER 20 MILLION VOTERS HAVE A LOCAL NEWSPAPER APP ON THEIR SMARTPHONE

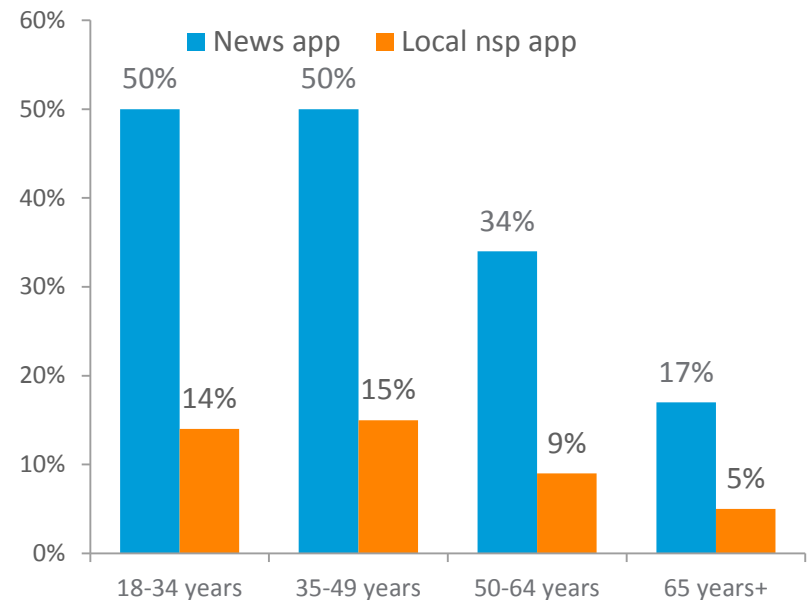
Smartphone app usage is particularly important component of reaching younger voters. Newspaper news apps are stronger among younger voters as well.

Smartphone ownership by age



Base: Total respondents
 Q13: Which of the following do you personally use to access the internet?

Smartphone apps for news, by age

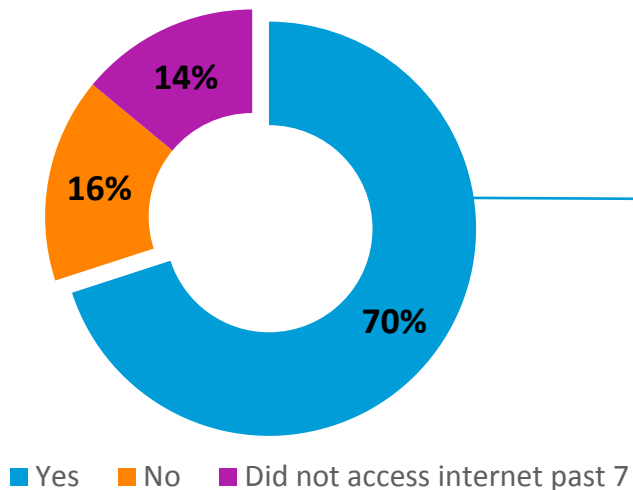


Base: Total respondents
 Q14: Do you have an "app" on your smartphone that allows you to access NEWS information?
 Q15: Do you have an "app" from, or sponsored by, a LOCAL newspaper in your area on your smartphone?

55 MILLION VOTERS SEE NEWSPAPER CONTENT ON SOCIAL MEDIA

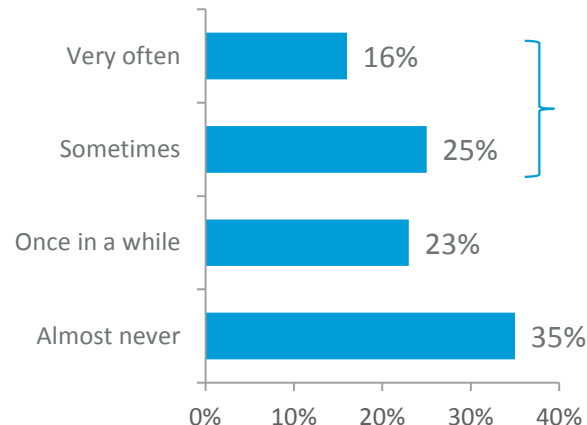
Seventy percent of voters have visited social media sites in the past 7 days and over 40% of them report seeing local newspaper articles on social media “very often or sometimes.”

Visited social media site past 7 Days



Base: Total respondents
 Q8: In the past 7 days have you accessed a social media site such as Facebook or Twitter?

Frequency of seeing newspaper articles on social media



Audience = 55 million

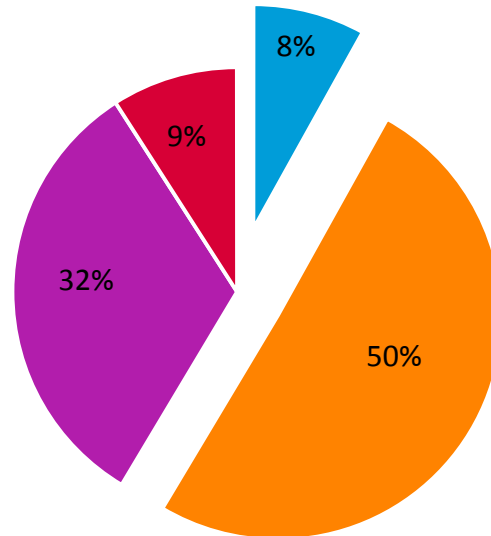
Base: Visited social media site past 7 days = Yes
 Q9: When you access various social media sites such as Twitter or Facebook, how often do you see articles that come from a LOCAL NEWSPAPER STATION?

An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of curved, overlapping lines in various colors (blue, green, yellow, orange, red, purple) fan out to the right, forming a funnel shape. Several colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them towards the right. The overall effect is one of a complex network or funnel of information.

NEWSPAPERS REACH OPINION LEADERS
WHO TRANSMIT INFLUENCE TO LESS
KNOWLEDGEABLE VOTERS

DISTRIBUTION OF POLITICAL SAVVY

Opinion Leaders and Early Followers make up over half of the electorate. Opinion Leaders are dramatically more important than their size because each Opinion Leader influences many of their less knowledgeable friends.



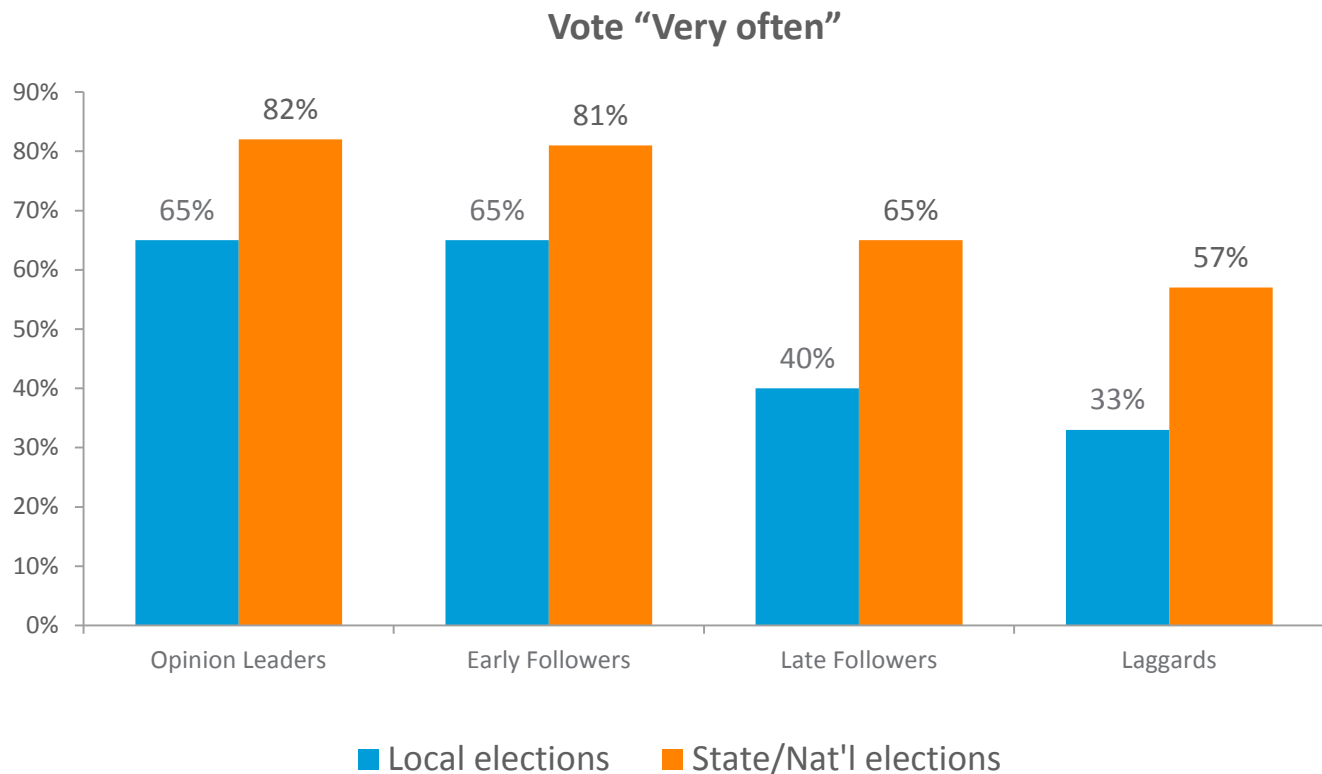
■ Opinion Leaders ■ Early Followers ■ Late Followers ■ Laggards

Base: Total respondents

Q25: Which of the following best describes you? Opinion Leaders = I am always the first to find out about the top LOCAL news stories, Early Followers = I am usually ahead of the curve when it comes to the top local stories of the day, Late Followers = I find out about the top local stories of the day after others talk about it, Laggards = I generally don't find out about the top news in my community

FREQUENCY OF VOTING IN ELECTIONS

As expected, both Opinion leaders and Early followers are much more likely to vote--
—exactly the groups with strongest newspaper reach.



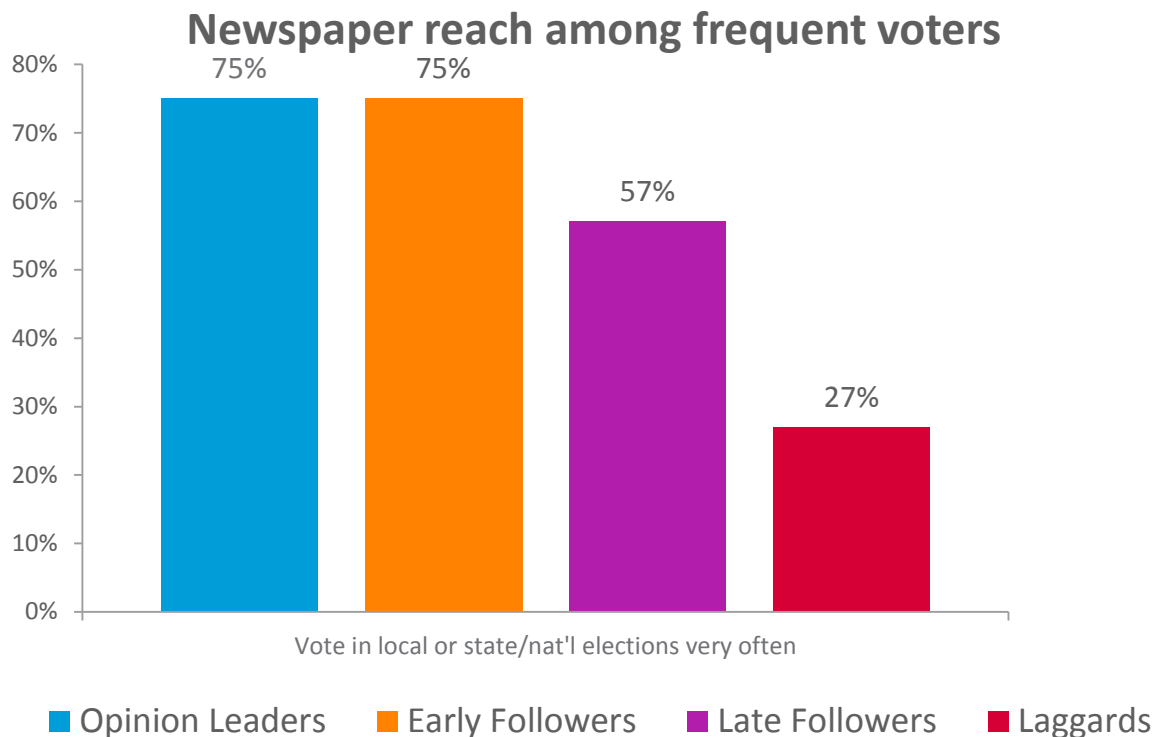
Base: Total respondents

Q32: How often do you usually vote in your local town, city, or county elections including school board elections?

Q33: Switching to non-local elections, how often do you vote in state or national elections?

NEWSPAPERS REACH 75% OF OPINION LEADERS AND EARLY FOLLOWERS

Newspapers reach the vast majority of Opinion Leaders and Early Followers.



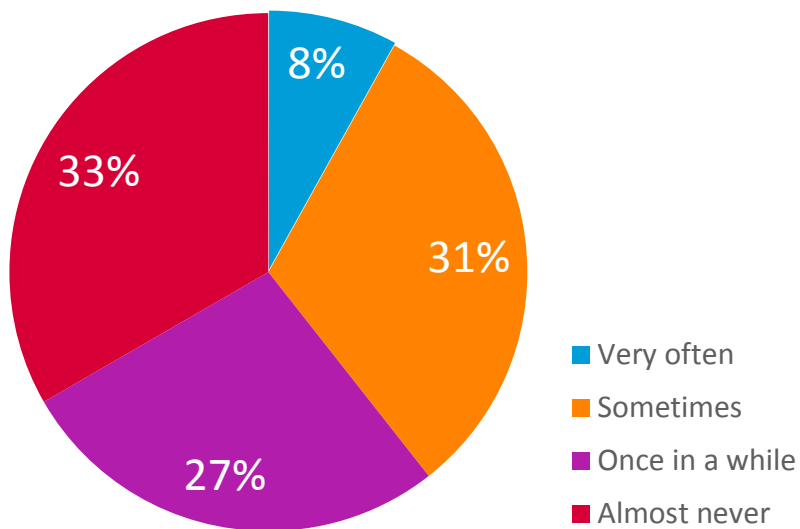
Base: Vote in local (Q32) or state/national elections (Q33) = Very often

NAA INA = Any Daily print CUME; Any Sunday/weekend print AVERAGE ISSUE; Any newspaper website past 7 days

POLITICAL ADVERTISING IMPACTS 39% OF VOTERS

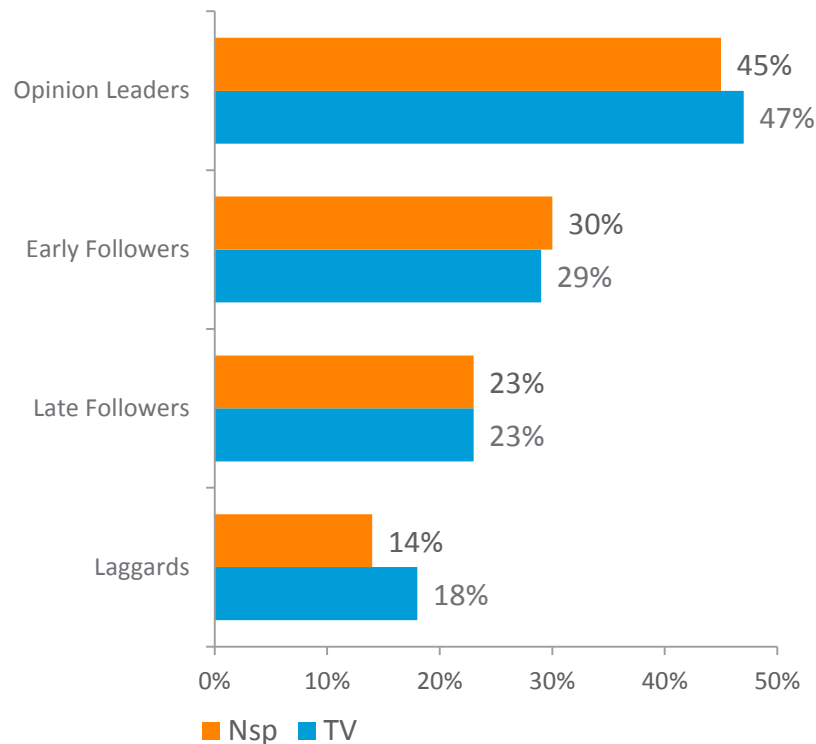
Newspaper and television are equally likely to influence voters across the spectrum.

Impact of political advertising on voting decisions



Base: Total respondents
 Q37: How often does political advertising on behalf of local candidates or community issues impact your vote decision?

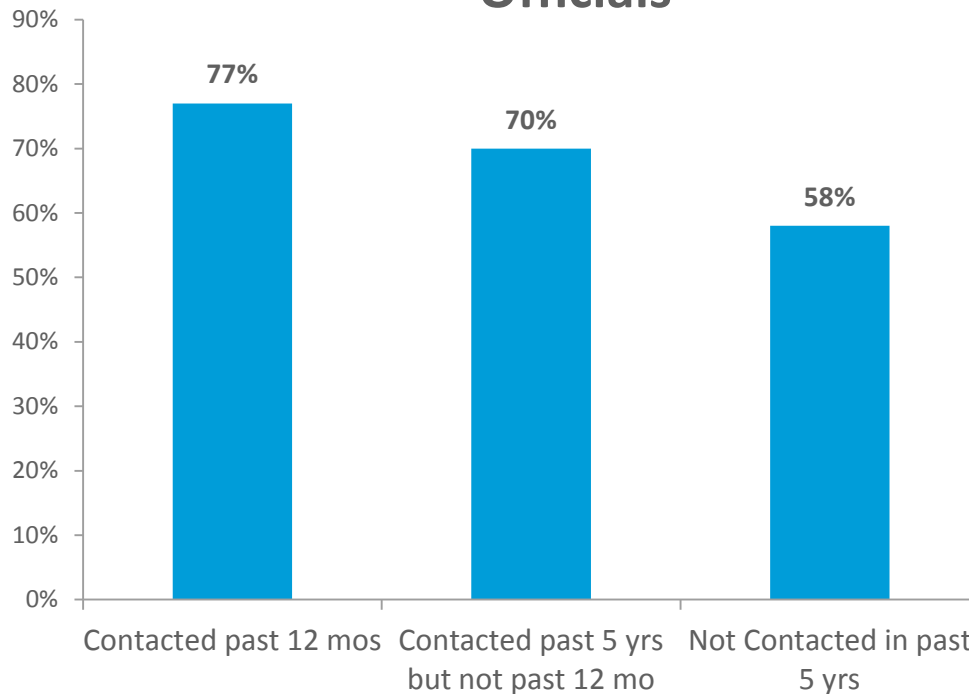
Political ads “very or somewhat likely” to impact voting decision



Base: Total respondents
 Q38, Q39: How likely is political advertising you see in LOCAL NEWSPAPERS/TELEVISION able to impact your vote decision?

NEWSPAPER READERSHIP IS MUCH HIGHER AMONG THOSE WHO ACTIVELY CONTACT ELECTED OFFICIALS

Newspaper Reach by Contact with Local Officials



Base: Total respondents

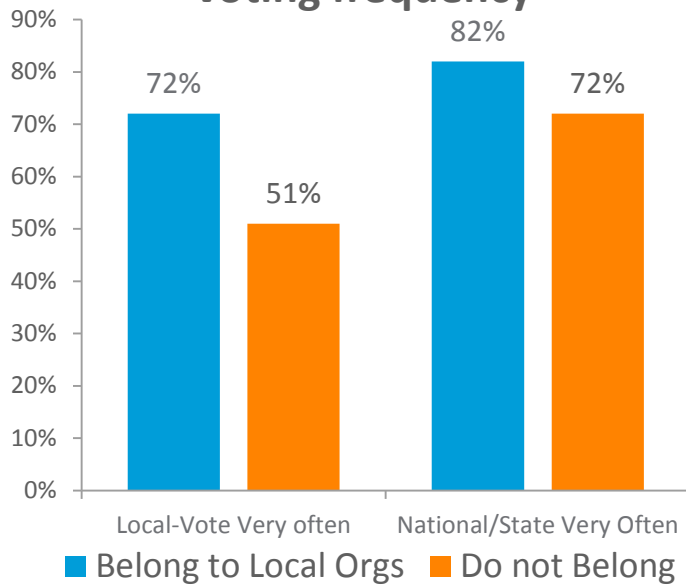
Q29: In the past five years, have you contacted an elected local official or community leader in any way to let them know how you felt about an issue that is important to you?

Q30: Have you contacted a local elected official in the past 12 months?

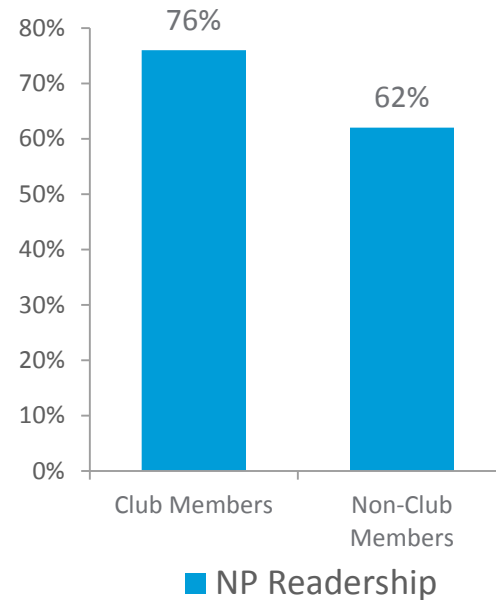
MEMBERS OF LOCAL ORGANIZATIONS ARE FAR MORE LIKELY TO VOTE AND TO READ NEWSPAPERS.

Community improvement club members are much more likely to vote—especially at the local level. While over three-fourths of club members read newspapers, only 62% of non-club members read newspapers.

Local club membership by voting frequency



Newspaper readership of club members and non-members



Base: Total respondents

Q31: Are you a member of a local club or organization that works on issues that are important to you?

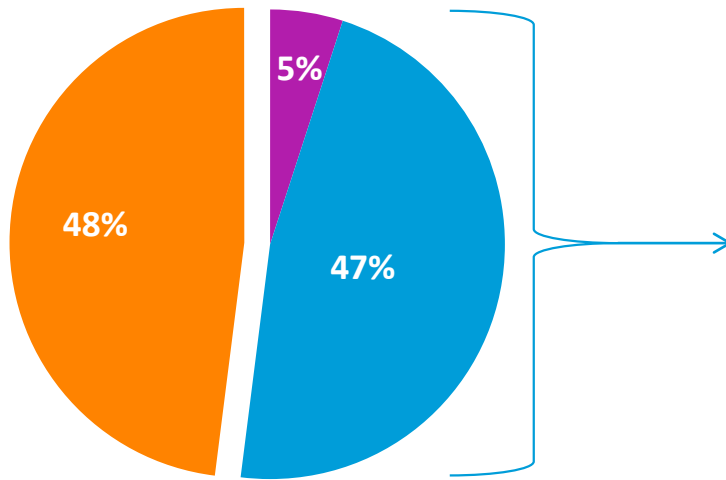


NEWSPAPERS REACH CRITICAL VOTER SEGMENTS

OVER HALF OF VOTERS “OFTEN” OR “SOMETIMES” CHANGE MINDS IN LOCAL ELECTIONS

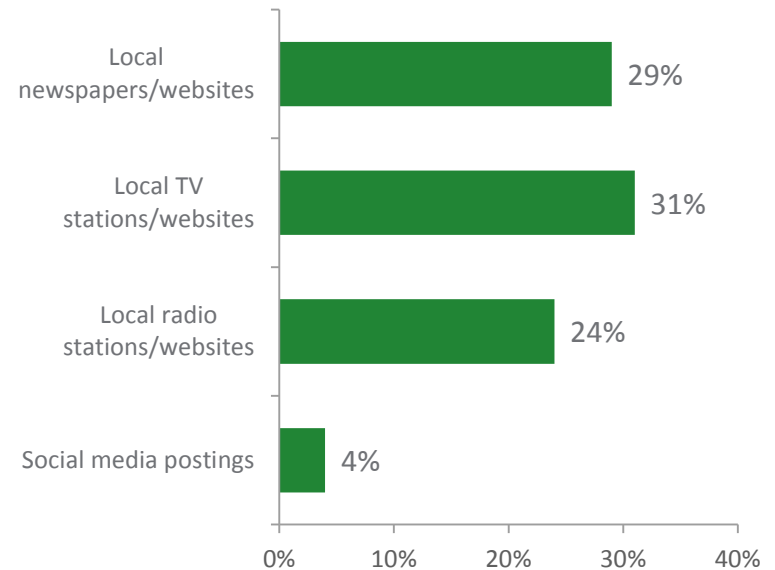
Over half of voters change their minds during local elections. Television and newspapers are equally trustworthy for news and info among those changing their minds.

Changing mind during local elections



- Often change mind
- Sometimes change mind
- Rarely change mind

Extremely trustworthy local media among changers



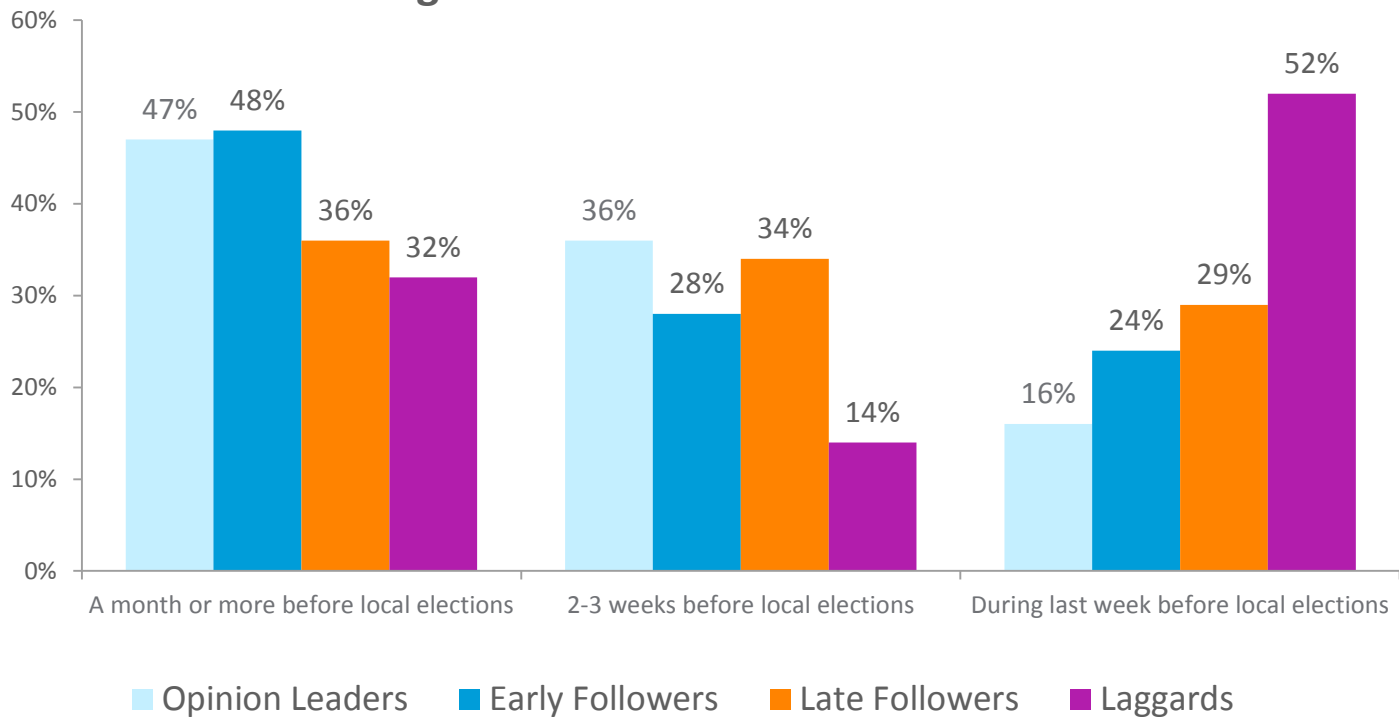
Base: Total respondents
 Q27: While this may vary from candidate to candidate, generally speaking, which of the following best fits how often you find yourself changing your mind about local candidates you will vote for during the month or two before local elections?

Base: Q27 = Often or sometimes change mind
 Q19: Thinking about the trustworthiness of the NEWS AND INFORMATION you see on your local media, how trustworthy would you say the NEWS AND INFORMATION is for each of the following?

TIMING OF DECISIONS FOR LOCAL ELECTIONS

Over 40% of voters make their decisions for local political elections a month before elections. Unsurprisingly, voters who are least aware of the news are much more likely to wait until the last week before elections.

Timing of decisions for local elections



Base: Total respondents

Q26: Generally speaking, which time period best fits when you've made your decision on most of the important local political elections?

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