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Notes on the *New Readers Study*

Background

Since 1999, the newspaper industry has supported new research to help it grow readership. The work, which also includes teaching the research findings and their application throughout the industry, is done by the Readership Institute at Northwestern University in Evanston, Illinois and funded by the Newspaper Association of America (NAA), the American Society of Newspaper Editors (ASNE) and the McCormick Tribune Foundation.

The *Impact* study, conducted in 2000 with 100 local daily newspapers, identified four large drivers of general readership – content, service, brand and internal culture.

The *New Readers* study, conducted in 2003-04 in 52 markets, focuses on younger adults, who are the most diverse population segment. It is a widely held myth that young adults will naturally and inevitably pick up the newspaper habit as they age. On the contrary, research over several decades shows that people do not read more as they age; in fact they read less. In addition, aging cohorts of heavy readers are being replaced by people who read at a significantly lower level.

What can newspapers do to engage younger adults? How do we get inside their heads to understand their experiences – including their thoughts and feelings associated with the newspaper – so that we can figure out ways to engage them more? That is the purpose of *New Readers*.

It is important to note that newspapers still reach a significant proportion of younger adults. For instance, the Institute's 2003 national Reader Behavior Score (RBS) study found that while 18-24 year olds are less likely to read than their older counterparts, 61% read their local daily newspaper over the course of a typical week. Sunday is the day most likely to be read, and those who do read spend about 50 minutes with it. Their average weekday reading time is about 20 minutes. They tend to be selective in what they read, looking at less than half of the Sunday paper and less than one-third of the weekday paper.

Older readers – especially those over 65 – have more robust usage patterns. The concern is that given the trends referenced above, current older and heavier readers will be replaced by generations that lack a strong newspaper-reading habit.

Study Method

New Readers focuses on the readers of 52 local daily newspapers (see last page.) Most of the newspapers were chosen from markets in which the target demographics of race/ethnicity are abundantly present.

(Please note this should not be called a national study. Although it is a huge study, it is not a random sample of newspapers that, together, represent the industry as a whole. That was the *Impact* model, which looked at a representative cross-section of local daily newspapers and general readership; by contrast, *New Readers* looks at how specific groups of readers experience their local daily newspaper.)

We focused on readers (as opposed to a mix of readers and non-readers) for several reasons:

- They already have some connection with their local daily newspaper. If the level of engagement can be increased, light readership can be moved to moderate, and moderate to heavy.
- Current readers are a newspaper's best marketers in terms of bringing in others like them to the newspaper.
- Studying readers allows us to relate what they experience, think and feel about their local daily newspaper to a quantitative analysis of what is actually in the newspaper.

New Readers gathered data from the following areas:

1. The Consumer/Reader

We collected information on their newspaper usage; their thoughts and feelings associated with the newspaper (experience); preferences and satisfaction with content (editorial and advertising) and service; their use of the newspaper's website. Detailed questionnaires were completed by 10,800 respondents. This represents a 55 percent response rate to the surveys fielded.

2. The Content of the newspaper

We analyzed 33,000 stories and photos; 12,000 ads; 21,000 in-paper content promotions.

3. Workforce Demographics and Newspaper Culture

We conducted a census of employees in every newspaper department, by race, gender and level in the organization. On a sampled basis, we conducted organizational culture surveys in every department and at all levels. More than 6,600 employees responded to the surveys.

Recommendations to the industry

The study identifies many opportunities to engage under-served audiences – if newspapers are prepared to do three things:

- Get into the heads of younger and diverse readers; understand how they live and what hot-button “experiences” to push.
- Move from “tweaking around the edges” or incremental improvement, to real innovation.
- Build an organization that focuses on readership, rewards growth and practices continuous innovation.

Details behind the recommendations

What experiences are

Newspapers do more than just transmit news and information – they appeal to, trigger and create experiences, for better or for worse, in consumers. In today’s environment, with a multiplicity of media choices, readers are not passive recipients. Influenced by their backgrounds, personality, motivations, interests and so on, they respond, react to and interact with what the newspaper provides (editorial and ad content) and how it’s provided (service and marketing).

This, in turn affects how much they use the newspaper – readership, or as we measure it, Reader Behavior Scores. (RBS measures frequency of reading, time spent with the newspaper and completeness of reading, on weekdays and on Sundays.)

So it is imperative to understand how readers, and different groups of readers, **experience** the local daily newspaper – to get inside their heads and understand their hot (and cold) receptors. Newspapers can then work to enhance the experiences that are linked with stronger reading, and minimize the experiences that depress it.

The *New Readers* study identifies about 30 experiences that offer the most potential for readership growth. We’ve narrowed that list to the eight that could make the greatest difference with the target groups.

Further, we link the experiences with the current characteristics of advertising and editorial content. In other words, we can tell you what it is that newspapers do now that tends to create more motivating experiences in their readers. At the same time we caution that it’s not enough just to do more of the same. That approach alone will not realize the full potential of what understanding and acting on the consumer’s “experience” could bring. Innovation is critical.

Experience isn't a concept we invented. It is a powerful, consumer-based reality that matters to newspapers in some very important, practical ways:

- It is strongly correlated with readership.
- It is a better predictor of readership than content satisfaction.
- Strong motivating experiences in newspapers increase the effectiveness of advertising content; inhibiting experiences decrease its effectiveness.
- It requires newspapers to really get inside consumers' heads before using the levers of content, service and marketing. It should inform how those levers are used.

We identified about 30 reader experiences that cut across all readers. In other words, everyone has them to a greater or lesser degree. Since that is a daunting number to tackle, we have winnowed them down to eight initial possibilities.

The criteria used to make the cut:

- Does the experience offer an opportunity for general readership and for the target groups?
- Does it offer practical, concrete opportunities to make incremental and stretch (innovative) improvements?
- Could innovations around the experience have a positive effect on other experiences?
- Does it have application to service and advertising, as well as news content?

Each experience below has a shorthand label, followed by the actual consumer feelings/reactions that factored together to make up each experience.

Something to talk about (motivator)

I like to talk about the national news and current events I read about in it.

I bring up things I've read in this newspaper in conversations with many other people.

I like to give advice and tips to people I know based on things I've read in this newspaper.

I show things in the newspaper to people in my family.

Part of my role among friends or family is to keep them informed because I read the newspaper.

Makes me smarter (motivator)

Even if I disagree with things in this newspaper, I feel like I have learned something valuable.

It shows me how other people live their lives.

I look at the newspaper as educational. I gain something.

This newspaper is good at telling stories about things that happen and how they turn out.

This newspaper has columns that give good advice.

It is a way to learn about new products.

I learn about things to do or places to go.

Value for my money (motivator)

Even if this newspaper cost twice as much as it does now, I would still read it.
The newsstand price could probably be higher and sales would be the same.
Overall, this newspaper provides pretty good value for the money.
I save more money from its ads and coupons than I spend on the paper.

Looks out for my personal and civic interests (motivator)

Reading this newspaper adds to my enjoyment of other things I do.
People would be better parents if they read this newspaper.
I think people who do not read this newspaper or one like it are really at a disadvantage in life.
Reading the newspaper makes me feel like a better citizen.
I feel like the money I spend on this newspaper is a good thing for my community.
I feel like the day is incomplete if I miss reading this newspaper.
I count on this newspaper to investigate wrongdoing.
It gives me ideas about how to help in the community.
Our society would be much weaker without newspapers.

Ad usefulness (motivator)

I use the ads to know what is on sale.
I look at most of the ads.
It makes me want to go shopping.
I like the ads just as much or more than the stories.
I like the ads for unusual things.
I value the coupons in this newspaper.

Good service (motivator)

This newspaper offers good service.
I don't have problems getting the paper delivered to my home because of where I live.
I do not have to deal with my paper being missing or stolen.
I always get the newspaper in good condition.
I would probably not read the paper more even if it were easier for me to get it.
I always get it when I want it.

Too much (inhibitor)

- It tries to cover too much.
- It has too many special sections.
- Too many of the articles are too long.
- I wish this newspaper had fewer pages.

Discriminates and stereotypes (inhibitor)

- They only target minorities for their money. They don't care about them.
- This paper is sometimes unfair in its stories about minorities.
- This newspaper perpetuates racial or ethnic stereotypes.
- This paper has a history of discrimination against minorities.
- I worry that other people reading this paper will get the wrong impression of minority groups.
- This newspaper is basically about white America.

Let's consider "Something to talk about," an experience that newspapers, of all media, are uniquely positioned to dominate. It has strong potential to grow readership across all groups, but younger adults are currently experiencing it less in their local daily newspaper than other groups. That represents opportunity.

Looking at the content of the *New Readers* newspapers gives us some clues about what currently creates this experience for 18-to-24-year-olds. Two kinds of content are most strongly associated with this experience for them:

- **Lifestyle & features:** includes home, health, food, fashion, recreation, science
- **Advertising:** food, clothing & basics; home improvements and furnishings; places to go & things to do; services

By contrast, for readers 35-plus, the experience is linked to hard news; editorials; "my community" stories; lifestyle & features; and service.

So, if a newspaper wanted to build more of a "talk about it" experience for younger adults, one place to start is to focus its initial brainstorming around those kinds of content. Please note this is not a recommendation to focus exclusively on so-called "soft" topics for this group. The research identifies only those things that newspapers are doing now that have some effect in creating positive experiences for different groups. The implication is that intensifying and expanding these efforts should bring better results.

But the research does not (and cannot) measure new approaches and innovations that are not in the current repertoire, and which could be even more effective. That is why we stress the notion of not just incremental improvement, but innovation.

In the last year, newspaper companies have launched a few innovative daily or weekly newspapers, such as Quick in Dallas, RedEye in Chicago and weekly lifestyle and entertainment tabloids in several Gannett markets. These publications clearly have

specific audiences, interests and experiences in mind, and the news and advertising content, service and marketing reflect that focus.

We applaud these moves and hope they multiply – they are signs of an industry responding more quickly to the marketplace. But we strongly urge newspapers to also innovate within the mainsheet.

Building an organization that encourages innovation

As well as looking at what's in newspapers and how readers experience it, we examined what's going on inside the newspapers – the workforce, internal culture and readership focus.

This is not culture in terms of “the culture of journalists” or the culture of sales reps, or marketers, or circulators. What we mean by culture is how people are expected to behave as members of a newspaper organization. Executives and managers set most of the expectations or are in a position to influence them, so their role is key.

If the newspaper is defensive, slow to change and not responsive to customers, innovation is unlikely. If the newspaper is constructive, if employees are expected to be reader/customer-focused, and if risk-taking is rewarded, innovation is more likely to happen.

From the *New Readers'* organizational data, we developed an index that measures readiness to innovate. Each newspaper was ranked on the scale.

The highest-scoring papers have these things in common:

- They are more constructive and less defensive than the rest.
- They are more attuned to the marketplace.
- They are quicker to react to changes in the market and in customers.
- Their employees are much more “engaged” with the newspaper – that is, they are not only present for work and performing to standard, but often perform above standard and are deeply involved in helping the newspaper succeed in its goals.
- They are better at articulating the mission and involving employees in decisions that affect them and the business.
- They provide more training and development.
- They have a higher proportion of female and non-white employees.
- They have a higher proportion of female and non-white employees in positions of influence.

Here's the most important thing: They get better readership results, both in general readership and among under-served groups. They are also better at providing some of the experiences important to those groups.

More detail on these findings is in two slide decks from the readership presentations at the NAA/ASNE 2004 conventions. You can access them from the home page of www.readership.org

New Readers Newspapers

The Daily Advertiser	Lafayette, LA	Montgomery Advertiser	Montgomery, AL
Amarillo Globe-News	Amarillo, TX	New Haven Register	New Haven, CT
Arizona Daily Star	Tucson, AZ	News & Record	Greensboro, NC
The Augusta Chronicle	Augusta, GA	Newsday	Melville, NY
Austin American-Statesman	Austin, TX	The Oregonian	Portland, OR
The Bakersfield Californian	Bakersfield, CA	Orlando Sentinel	Orlando, FL
Billings Gazette	Billings, MT	The Philadelphia Inquirer	Philadelphia, PA
The Boston Globe	Boston, MA	The Plain Dealer	Cleveland, OH
The Californian	Salinas, CA	The Press-Enterprise	Riverside, CA
Chicago Tribune	Chicago, IL	Quad-City Times	Davenport, IA
The Commercial Appeal	Memphis, TN	The San Diego Union-Tribune	San Diego, CA
Corpus Christi Caller-Times	Corpus Christi, TX	San Francisco Chronicle	San Francisco, CA
Cumberland Times-News	Cumberland, MD	San Jose Mercury News	San Jose, CA
The Daily Reflector	Greenville, NC	Seattle Post-Intelligencer	Seattle, WA
The Dallas Morning News	Dallas, TX	South Bend Tribune	South Bend, IN
Danville Register & Bee	Danville, VA	Standard-Examiner	Ogden, UT
The Denver Post	Denver, CO	The Star-Ledger	Newark, NJ
El Paso Times	El Paso, TX	The Tampa Tribune	Tampa, FL
The Fresno Bee	Fresno, CA	The Times Herald-Record	Middletown, NY
Greeley Tribune	Greeley, CO	The Times	Shreveport, LA
Hickory Daily Record	Hickory, NC	Times-Herald	Vallejo, CA
Houston Chronicle	Houston, TX	Tri-City Herald	Kennewick, WA
The Joplin Globe	Joplin, MO	Valley Morning Star	Harlingen, TX
The Kansas City Star	Kansas City, MO	The Washington Post	Washington, DC
Las Vegas Review-Journal	Las Vegas, NV		
Los Angeles Times	Los Angeles, CA		
The Miami Herald	Miami, FL		
The Monitor	McAllen, TX		