

UNDERSTANDING AFRICAN- AMERICAN AND HISPANIC CONSUMERS

RESULTS FROM THE IMPACT STUDY

READERSHIP INSTITUTE
Media Management Center at Northwestern University

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INTRODUCTION

African-American and Hispanic growth has far outpaced that of the White population. According to the 2000 U.S. Census, the Hispanic population grew 57.9 percent nationally between 1990 and 2000, the African-American population grew 15.6 percent. Not only does this growth represent a large number of potential newspaper readers, many are young readers who represent much of newspaper's future readership.

Newspapers have a strong and enduring connection with readers across the country, including African Americans and Hispanics. The Readership Institute found that local daily newspapers reach 80 percent of African Americans and 66 percent of Hispanics in any seven-day week. As Hispanic and African-American readership will become increasingly important for the future of newspapers, it's encouraging to see there is a strong foundation on which newspapers can build.

When the Readership Institute explored ways to increase readership in these key markets, it found many opportunities. Advertising content has great potential to increase readership among Hispanics and African Americans. Not only do Hispanics and African Americans already spend significantly more time reading advertising than Whites, improving advertising content has the potential to bring even more people to the newspaper.

Improving service also has power to increase newspaper readership among African Americans and Hispanics. Both groups tend to be single copy buyers at a rate double that of Whites, so the areas for improvement differ from the overall market. For Hispanics, improving the cost of home delivery has higher-than-average potential. For African Americans, improving the completeness and condition of the newspaper as well as the quality of paper, ink and type size has above-average potential.

As we studied the opportunities offered by an overall brand perception, we saw both common ground and differences. Newspapers that are "intelligent, successful and experienced" appeal to readers from all groups. Creating a newspaper brand perception that "makes me think" also has great potential for African Americans and Hispanics. Hispanics also respond to newspapers that convey a sense of "belonging/fulfillment" and "cares about me."

This report offers additional detail on the Impact study's findings about how to serve African Americans, Hispanics and Asians. For more information about the strategic implications of these findings, read "How Newspapers Can Better Serve African Americans and Hispanics" available at www.readership.org.

PART I: OPPORTUNITIES

The Impact study's main purpose was to understand readership and what drives it. The Impact study explored ways to increase readership through service, editorial content, advertising content and brand perception. In this report we will discuss what areas have the greatest potential to increase readership among African Americans and Hispanics along with overall media consumption patterns.

The Readership Institute recognizes that the challenge in increasing readership is not in finding ways to improve it, but to prioritize improvement areas and use resources effectively. To address this problem, the Readership Institute developed "opportunity scores." Opportunity scores tell us how likely it is that an improvement will lead to increased readership in the paper. Because opportunity scores reflect changes in actual reading behavior, they give us the most accurate picture of how newspapers can improve readership.

Not surprisingly, some opportunities have more potential than others. Low opportunity scores may result if the improvement isn't important to readers or if it's important only for a narrow group of readers.

The opportunity scores themselves have no inherent meaning -- they are relative scores used to rank areas. Differences of three to four points in an opportunity score also aren't meaningful. To compare racial and ethnic groups, the important thing to focus on is order of rankings.

We were unable to complete all parts of this analysis for Asian respondents due to a small sample size. When we focus on Black and Hispanic respondents we see several important points.

OPPORTUNITIES IN EDITORIAL CONTENT

Many characteristics influence the readership-building potential of editorial content areas. In general, men are more interested than women in police, sports, business and politics coverage. Women are more interested than men in community announcements/obituaries/ordinary people coverage, movies/tv/weather and science coverage. Younger people respond more strongly to sports than older readers, less to politics.

Focusing on the differences among racial or ethnic groups, we see that among the top three areas, all groups are very consistent: Easy to read content, community announcements and stories about ordinary people and health, home, food, fashion and travel lead all other content areas in terms of the potential to grow readership

For Blacks, science and business have higher than average potential. Government/war/politics and disasters/accidents have significantly lower potential to increase readership.

Police/crime has higher potential for Hispanics, science has less compared to other groups.

Content Area	Overall	African American	Hispanic	White
Easy to Read Content*	67	74	53	75
Community announcements, obituaries, ordinary people	64	69	52	71
Health, home, food, fashion & travel	57	70	52	64
Government, war, politics, international	53	38	40	60
Natural disasters/ accidents	51	54	34	56
Movies, TV, weather	50	58	37	56
Business, economics, personal finance	46	61	39	51
Science, technology, environment	46	62	22	52
Police, crime, courts, legal	44	45	40	49
Sports	44	44	34	49
Education	43	49	23	48
Parenting, relationships, religion	39	40	23	43
Arts	30	27	33	33
Automotive	27	32	22	31
Popular music	20	20	14	23
Jobs & career	18	36	0	21

*“Easy to Read” is both a brand perception and an editorial content quality.

OPPORTUNITIES IN ADVERTISING CONTENT

Generally advertising has higher potential to build readership among young people and women. Beyond overall trends, advertising is of greater potential to increase readership among Hispanic, African-American and Asian respondents than to Whites. African Americans and Hispanics express greater interest in all categories of advertising. Asians are more interested than the overall population in classified advertising.

Time spent reading advertisements reflects overall interest levels. Hispanics spend more time reading than other groups, Whites less.

Opportunity Scores

Advertising Area	Overall	African-American	Hispanic	White
Ad and inserts for food and groceries	42	51	46	47
Ads for clothing, health and non-food stores	42	66	47	47
Ads for entertainment and sporting events	41	46	35	47
Classified Ads	20	40	14	23

	Total	White	African-American	Asian	Other	Hispanic
Weekend time spent reading ads¹						
% none	20.9	37.2	32.8	47.5	45.7	44.7
% less than 30 min	52.2	42.6	37.1	32.1	37.1	29.5
% 30-60 min	20.4	15.8	18.5	14.3	9.1	17.0
% 1 hr to 2 hours	5.1	3.4	8.7	4.3	6.9	7.4
% 2 hours to 2 1/2 hours	.7	0.5	0.7	1.1	0.0	1.3
% 2 1/2 hours to 3 hours	.4	0.3	1.6		0.4	0.2
% 3 hours or more	.3	0.2	0.6	0.7	0.8	0.0

¹ Results reflect only people who say that they typically read newspapers

OPPORTUNITIES IN NEWSPAPER SERVICE

Generally service has greater potential to increase readership for whites than other racial or ethnic groups

Ease of single-copy purchase has higher potential for African American and Hispanic respondents.

Service Area	Overall	African American	Hispanic	White
Condition & completeness of paper	65	75	51	88
Quality of paper, ink & type size	59	70	66	79
When & how the paper is delivered	58	37	66	79
Accuracy of the bill	56	30	53	77
Cost of home delivery	55	32	62	75
Customer service	55	35	43	76
Easy to buy at a store/vending machine	*	37	25	11

Some differences in service expectations may be explained by differences in how groups receive their newspaper. African Americans and Hispanic respondents are much more likely to be single-copy buyers than the overall population. This may explain why delivery service has less potential to increase readership.

	Total	White	African-American	Asian	Other	Hispanic
Weekday Acquisition method						
% Do not get paper	12.1	12.5	7.2	10.2	17.9	14.2
% Home delivery	62.4	65.0	37.0	54.1	45.7	44.0
% Work delivery	4.5	4.2	8.0	11.4	5.6	4.9
% Single-copy	12.8	10.7	34.6	16.7	16.7	28.6
% pass-along	8.2	7.6	13.3	7.5	14.2	8.4
Sunday Acquisition Method						
% Home delivery	70.1	69.6	39.2	58.8	52.6	49.9
% Work delivery	1.4	1.4	2.9	4.1	1.1	1.7
% Single-copy	21.4	19.7	42.1	26.1	30.7	35.7
% pass-along	4.7	5.0	8.1	4.9	7.3	5.4

OPPORTUNITIES IN NEWSPAPER BRAND PERCEPTION

The Readership Institute also explored how readers’ brand perception impacts readership of the newspaper. Overall, brand is a powerful way to bring people into the newspaper. The challenge is creating a strong, positive brand that is *relevant* to readers.

When we focus on differences between the groups, the most striking difference is that for Hispanics and African Americans, the quality “makes me think” has the most potential to increase readership. That same quality ranks sixth in readership-building potential for Whites.

In general, African Americans share similar readership-building brand perceptions with the overall results, three out of the top five. Hispanics share only one of the top five highest-potential brand perceptions with the overall rankings. Feelings of closeness and belonging as expressed in the brand perceptions “belonging, fulfillment” and “reflects my beliefs and cares about me” rank much higher among brand perceptions for Hispanics compared to other groups.

Brand Perception The paper is...	Overall	African American	Hispanic	White
Intelligent, successful, experienced	56	57	39	63
Honest, trustworthy, helpful	51	37	21	59
Informed, in the know	51	29	35	57
Community leader, strong personality	49	52	23	55
Middle class, neighborly	49	45	24	56
Makes me think	48	60	49	52
Reflects my beliefs, cares about me	46	37	38	51
Fun, creative, energetic	45	43	32	51
Belonging, fulfillment	43	36	40	48
Can be used anywhere, anytime	38	39	35	42
Accurate	30	42	16	33
Conservative	20	--	--	--
Opinionated, arrogant	15	33	21	16
Liberal	13	--	--	--
Old fashioned	6	--	--	--
Intelligent, successful, experienced	56	57	39	63

PART II: MEDIA USE

Many demographic characteristics relate to media use. Newspapers appeal to an older, more educated, more affluent population. Magazines also appeal to an older, more educated readership. Heavy television viewers tend to be older, female, less educated and less affluent. Internet users tend to be younger, male, more educated and more affluent. Internet users also tend to be low newspaper readers.

It can be difficult to untangle racial and ethnic media preferences from underlying socioeconomic patterns. In this report, we attempt to isolate differences among African-Americans, Asians, Hispanic and White survey respondents. When we find racial and ethnic differences that supercede income, education and age differences at a statistically-significant level, it has been marked with an asterisk.

Whites tend to use newspapers more than the average, spending almost 30 minutes per day with a local newspaper. Use of other media varies little from the overall average.

African Americans spend more time than any other groups consuming media. Much of that time is spent watching television. African Americans watch television for 1.5 hours more each day than do other groups. Although average newspaper use is lower than average, it reflects age, income and education differences rather than racial or ethnic preferences. Once we account for age, income and education, African Americans read at the same rate as the overall population.

Asians spend more time on the Internet than do others and the least amount of time with the television and radio. The comparatively low television use is somewhat deceptive; once we account for the higher educational and income levels among Asian respondents, their television consumption is actually higher than other groups. The opposite is true of newspaper, television and radio -- Asians read the newspaper at a comparably lower rate than the overall population if we account for differences in the population.

Hispanic respondents listen to the radio more than any other group; Internet use is also higher than the overall average. Hispanic newspaper use is significantly lower than the overall population.

	Total	White	African-American	Asian	Other	Hispanic
Minutes per day spent						
Local Daily Newspaper	22.2	23.7*	19.2	12.1*	16.0	15.0*
Any Daily Newspaper	28.2	29.7*	22.1	20.6	19.9	18.8
Magazines	19.8	20.6	18.4	19.9	24.4*	15.7*
Internet	32.4	31.5	27.1	60.3*	40.0*	39.3*
Television	191.3	186.1	292.7*	168.4	187.4	188.5
Radio	191.4	190.0	206.1*	170.7*	211.7*	214.5*

In general, the more time spent listening, watching or reading one media source, the more likely that other tasks are done at the same time. Although more minutes are spent listening to the radio than any other medium, it is almost always while engaged in another activity. Newspapers and magazines receive more undivided attention than do other medium.

Newspapers show themselves to be the primary source of news for all respondents, regardless of racial or ethnic group. African-American and Asian respondents are more likely than other groups to turn to local television news for information. Asians rely on national television news and news magazines more than other groups and use all types of news websites more often. Of news Websites hosted by conventional media outlets, newspapers are the clear frontrunner as a source of information among all racial and ethnic groups.

	Total	White	African-American	Asian	Other	Hispanic
Number of outlets						
Different papers read/week	1.3	1.3	1.3	1.2	1.3	1.0
Different radio stations/week	3.0	3.0	2.8	3.1	3.5	3.2
Websites visited/week	7.2	7.1	7.5	9.5	10.6	7.2
Percent never/rarely doing other tasks at the same time						
% Newspapers	26.9	28.3	20.5	30.5	24.0	23.8
% Magazines	26.6	27.9	24.0	28.5	29.7	27.6
% Television	11.5	11.7	8.6	12.3	11.4	10.0
% Radio	2.5	2.2	5.2	3.6	3.9	3.0
Percent saying newspapers are "extremely or very" different from competitive media						
% Television	34.2	32.9	40.1	37.6	46.6	45.7
% Radio	41.1	40.6	46.8	37.7	50.0	45.2
% Magazines	50.5	50.3	54.5	54.7	52.8	52.1
% Internet	46.5	46.1	49.5	42.4	56.7	50.3
Percent using of media for news*						
% Newspaper Reading	81.2	82.5*	79.6	74.8*	78.1	65.9*
% Local TV News	65.5	66.3	69.9*	70.1*	55.9	62.2
% National TV News	49.5	50.4	50.6	55.2*	37.0	50.3
% News Magazines	21.3	21.0	21.7	32.4*	21.0	19.4
% Newspaper Web sites	16.0	18.7	18.4	37.4*	19.5	16.9
% TV News Web sites	9.2	10.2	12.7	21.3	10.8	18.0
% Magazine Web sites	9.8	11.0	12.5	20.0	15.6	15.4

* Regularly read or watch during any 7-day week

OVERALL NEWSPAPER² USE AND SATISFACTION

As was mentioned earlier, newspaper readers tend to be more affluent, educated and older. After adjusting for these differences, we see that Asian and Hispanic respondents read the newspaper significantly less than other groups. The Reader Behavior Score³ for African-American respondents appears lower than the average, however this reflects educational and income differences.

Daily reading reflects the overall pattern of newspaper use. Whites and African Americans read the paper more than Asian and Hispanic respondents. Sunday is the highest readership day regardless of racial or ethnic group.

	Total	White	African-American	Asian	Other	Hispanic
Overall newspaper use						
RBS	3.6	3.6	3.4	2.8*	3.1	2.9*
Days/week reading	3.4	3.6	3.0	2.4	2.7	2.4
Times picking up paper/day	1.4	1.4	1.4	1.5	1.5	1.5
Daily reading						
% Monday	47.1	48.9	43.3	32.0	35.7	33.8
% Tuesday	45.2	47.2	39.5	28.1	37.8	28.2
% Wednesday	48.6	50.4	46.6	30.7	40.7	31.9
% Thursday	46.5	48.6	40.8	30.6	36.0	31.3
% Friday	50.2	52.4	44.3	34.5	42.9	33.1
% Saturday	47.8	49.9	41.4	37.6	31.4	32.5
% Sunday	66.5	68.8	63.0	47.6	55.3	51.1

² The Impact study of readership asked respondents about their use of any newspaper and also about their use of a specific local newspaper. These local newspapers were mentioned by name on the survey questionnaires distributed in their home markets. Results in the following section about newspaper use are derived from the questions about these specific local newspapers. These newspapers were selected (for details read Appendix A) to represent all local U.S. daily newspapers.

³ A Reader Behavior Score (RBS) is a number between one and seven that reflect's each respondent's time spent with the newspaper, completeness of reading and the number of days read per week.

Whites and Asians have about the same opinion of the newspaper overall. African Americans and Hispanics give newspapers a lower overall rating.

When asked about the paper's ability to meet their expectations, Whites and Hispanics rated newspapers higher than African Americans and Asians. When asked about the overall value of the paper and intention to read the paper in the future, African Americans, Asians and Hispanics rated the newspaper lower than did Whites.

	Total	White	African-American	Asian	Other	Hispanic
Overall rating						
% Excellent	8.4	7.9	13.5	3.9	10.2	11.0
% Very Good	33.5	33.9	31.9	39.8	23.2	33.1
% Good	37.2	37.7	39.1	33.5	32.5	31.6
% Fair	15.8	15.8	12.1	20.1	16.5	12.4
% Poor	5.2	4.8	3.3	2.7	17.6	12.0
Paper's ability to meet expectations						
% Greatly exceeded	3.2	2.4	11.3	3.4	3.4	5.8
% Somewhat exceeded	9.7	9.1	14.4	11.6	12.1	12.4
% Met/Would meet	62.6	64.0	54.4	66.9	47.2	55.8
% Fallen somewhat short	17.9	17.9	15.5	14.8	16.5	19.6
% Fallen greatly short	6.6	6.6	4.4	3.2	20.9	6.4
Value for the money						
% Extremely Good	6.0	5.9	10.6	3.8	7.4	5.0
% Very Good	31.6	31.7	32.2	29.6	21.2	35.7
% Somewhat Good	46.1	46.4	45.2	49.2	43.7	38.2
% Not Very Good	11.2	11.4	6.5	10.1	12.6	14.2
% Not at All Good	5.0	4.6	5.4	7.2	15.1	6.9
Intention to read in future						
% Much more	1.3	0.7	7.2	5.9	2.6	2.8
% Somewhat more	8.2	7.3	12.4	17.9	8.5	9.8
% About the same	65.5	68.4	56.2	46.9	54.2	45.3
% Somewhat less	3.4	3.2	3.5	5.6	6.3	6.0
% Much less	3.0	2.8	3.3	5.4	2.9	3.9
% Do not read	18.5	17.6	17.5	18.2	25.4	32.2

WEEKDAY NEWSPAPER USE⁴

As was mentioned earlier, newspaper readers tend to be more affluent, educated and older. After adjusting for these differences, we see that Asian and Hispanic respondents read the newspaper significantly less than other groups. Asian and Hispanic respondents tend to spend less time with the newspaper and read less of it than the overall average.

Once underlying differences gender, age and income are taken into account, there is no difference in how much time African Americans spend reading the newspaper or how much of the newspaper that they read.

African Americans, Asians, and Hispanics are much more likely than Whites to be single-copy buyers and are less likely to receive the paper at home. African Americans and Hispanics are also more likely than Whites to read the newspaper but never buy it, making them pass-along readers.

	Total	White	African-American	Asian	Other	Hispanic
Weekday time spent reading						
Do not read	13.8	14.0	8.2	17.6	16.1	18.2
% 1-15 minutes	21.2	20.5	26.9	28.0	22.1	22.4
% 16-30 minutes	33.5	33.5	37.9	33.2	30.5	31.4
% 31-45 minutes	16.9	16.9	17.6	14.5	19.1	16.7
% 46-60 minutes	9.9	10.3	5.1	6.0	8.7	8.9
% 61 minutes or more	4.6	4.8	4.4	0.7	3.4	2.4
Weekday completeness						
None	14.0	14.3	10.9	17.3	16.3	16.0
% 1/4	18.1	17.1	24.0	30.2	24.9	21.6
% 1/2	16.7	16.4	19.0	15.8	18.6	19.6
% 3/4	17.1	17.6	14.6	20.0	8.1	12.9
% all	34.0	34.6	31.5	16.7	32.1	30.0
Acquisition method						
% Do not get paper	12.1	12.5	7.2	10.2	17.9	14.2
% Home delivery	62.4	65.0	37.0	54.1	45.7	44.0
% Work delivery	4.5	4.2	8.0	11.4	5.6	4.9
% Single-copy	12.8	10.7	34.6	16.7	16.7	28.6
% pass-along	8.2	7.6	13.3	7.5	14.2	8.4

†excludes newspapers published in the afternoon

⁴ Results reflect only people who say that they typically read their local Impact paper on at least one day Monday-Saturday

WEEKEND/SUNDAY NEWSPAPER USE⁵

Weekend readership habits reflect the same patterns observed in weekday newspaper use. Asians and Hispanics read less of the paper and spend less time reading. African Americans and Whites spend the same amount of time and read the same proportion of the newspaper as the overall population.

	Total	White	African-American	Asian	Other	Hispanic
Sunday time spent reading						
% Do not read	3.5	5.6	9.2	5.3	11.1	8.4
% less than 30 min	16.8	16.9	18.5	37.3	23.7	23.0
% 30-60 min	33.5	33.1	32.0	31.9	23.4	28.6
% 1 hr to 2 hours	32.4	31.0	29.6	19.0	32.1	31.3
% 2 hours to 2 1/2 hours	7.8	7.4	6.5	4.9	6.0	5.1
% 2 1/2 hours to 3 hours	2.7	2.6	1.8	0.1	0.8	2.1
% 3 hours or more	3.4	3.3	2.5	1.5	2.9	1.4
Sunday completeness						
% None	6.0	5.5	9.5	8.3	14.5	6.2
% 1/4	16.7	16.4	13.5	26.7	18.6	19.2
% 1/2	21.2	21.5	20.5	21.5	18.2	22.7
% 3/4	20.3	20.7	20.4	16.6	9.7	19.6
% all	35.8	35.8	36.1	26.9	39.1	32.2
Weekend reading time						
% None		3.5	5.0	8.8	9.2	5.8
% Sat morning	14.9	13.9	21.5	19.6	12.8	18.2
% Sat afternoon	4.9	4.4	8.1	3.1	6.7	8.1
% Sat evening	5.2	5.1	7.5	5.5	3.8	7.6
% Sunday morning	73.5	71.0	46.3	71.5	55.9	64.3
% Sunday afternoon	36.3	35.1	39.2	23.6	32.3	28.7
% Sunday evening	23.9	22.1	31.2	24.8	22.6	25.1
% Other times in week	13.2	12.9	21.1	14.1	14.4	19.4
Acquisition Method						
% Home delivery	70.1	69.6	39.2	58.8	52.6	49.9
% Work delivery	1.4	1.4	2.9	4.1	1.1	1.7
% Single-copy	21.4	19.7	42.1	26.1	30.7	35.7
% pass-along	4.7	5.0	8.1	4.9	7.3	5.4

⁵ Results in this section reflect only people who say that they typically read a Sunday newspaper.

GENERAL LIFESTYLE & DEMOGRAPHICS

The Impact consumer survey was fielded during the summer of 2000 using a multi-stage probability sample. Of 100,000 12-page written surveys fielded, 37,000 were returned. Non-response bias, which tended to under-represent light newspaper readers, was corrected using weights derived from a telephone survey of 2000 non-respondents. Despite this correction, non-response bias was somewhat stronger among racial and ethnic groups. During analysis, we tried to correct for this by taking into account gender, age, and income patterns within the data.

White respondents average 49.2 years old, older than those of other ethnic groups. African Americans averaged 46.4 years old. Hispanics and those that marked “other” averaged 41.7 and 41.9, respectively. Asian respondents were, by far, the youngest respondents, averaging 37.4 years.

The length of residence in the newspaper’s primary market is a good predictor of readership. Within our sample we see that African Americans and Whites have been living in the same town for about the same amount of time (differences are not statistically significant). Asian respondents have been living in their current town for the least amount of time, Hispanics slightly longer. The proportion of respondents who have lived in their current town for one year or less does not differ greatly by group.

	Total	White	African-American	Asian	Other	Hispanic
Gender						
% Male	48.8	49.3	37.8	57.2	59.8	49.8
% Female	51.2	50.7	62.2	42.8	40.2	50.2
Age						
% <23	4.4	3.4	8.7	15.2	5.4	12.4
% 23-34	20.4	19.4	20.5	34.1	27.9	26.6
% 35-54	41.3	41.5	41.5	39.0	50.3	42.2
% 55-59	7.1	7.4	6.7	3.6	3.2	4.4
% 60+	26.8	28.2	22.5	8.1	13.2	14.4
Years in living in town						
% in town <= 1 year	3.4	3.5	2.6	6.1	2.3	3.1
Education						
% Grade School	1.4	1.0	3.1	2.9	2.8	3.4
% Some High School	4.0	3.5	7.1	3.4	4.0	6.8
% High School Graduate	17.5	17.4	21.4	11.3	12.1	20.7
% Special/technical college	4.4	4.3	3.4	1.6	6.8	5.7
% Some college	23.6	24.0	21.2	13.6	23.1	27.2
% College graduate	23.6	23.5	24.7	28.8	23.7	22.7
% Some post-graduate	7.9	8.4	5.3	5.3	9.9	4.2
% Post-graduate degree	17.7	17.9	13.8	33.2	17.6	9.4

In our sample, Asians had the highest education level, followed by Whites, then African Americans, those that marked “other” and, finally Hispanic respondents. In all cases, our survey respondents tend to be very well educated. Of Hispanic respondents, 36 percent are college graduates or have advanced degrees. Of Asian respondents, the number jumps to 67 percent.

Analysis of household income shows that Asian respondents have the highest income followed by Whites, those that marked “other,” Hispanic respondents and, finally, African Americans.

	Total	White	African-American	Asian	Other	Hispanic
Employment status						
% Full time	57.0	56.7	55.9	63.8	61.9	63.3
% Part-time	7.6	7.6	6.4	4.6	10.1	8.4
% Homemaker	6.9	7.2	4.7	6.9	7.6	4.7
% Student	2.8	2.1	4.8	16.3	7.0	4.9
% Disabled	1.8	1.6	6.0	0.2	2.6	0.7
% Retired working part time	2.2	2.4	2.2	0.3	1.2	0.7
% Retired	18.9	20.2	15.1	4.1	7.3	10.7
% Not employed	2.7	2.3	4.9	3.8	2.4	6.6
Marital status						
% Married	59.8	61.5	36.5	59.1	53.6	54.5
% Widowed	8.4	8.6	11.0	1.0	3.6	3.6
% Legally separated	0.8	0.7	1.7		0.9	2.3
% Divorced	10.7	10.8	16.9	2.1	9.7	10.5
% Single (never married)	20.4	18.4	33.9	37.8	32.3	29.1
Housing status						
% Single-family dwelling	82.4	84.1	69.4	69.1	72.7	73.3
% Multi-unit apartment	17.6	15.9	30.6	30.9	27.3	26.7
Household income						
% Less than \$15,000	7.1	5.7	20.4	7.6	10.4	10.7
% \$15,000-24,999	9.9	9.3	15.0	5.8	15.8	14.3
% \$25,000-34,999	11.8	11.8	15.0	9.9	6.9	11.6
% \$35,000-44,999	10.8	10.9	12.1	12.3	9.5	9.2
% \$45,000-54,999	12.2	12.5	10.3	10.4	17.7	8.3
% \$55,000-64,999	10.0	10.1	8.5	11.0	9.4	9.5
% \$65,000-74,999	8.6	8.7	5.1	11.5	6.8	10.6
% \$75,000-84,999	6.8	6.9	3.9	4.3	3.6	9.4
% \$85,000-94,999	5.3	5.7	2.8	4.3	2.2	5.5
% \$95,000-104,999	4.6	4.8	1.9	6.3	4.9	2.9
% \$105,000-114,999	2.3	2.3	1.6	2.9	3.3	1.3
% \$115,000-124,999	1.6	1.7	0.2	2.1	1.2	1.6
% \$125,000+	9.0	9.5	3.2	11.7	8.3	5.3

Overall, satisfaction with life decreases as income and education increase. Women tend to be more satisfied with life than men. Asians tend to be more satisfied with life than other groups. That, however, is the only racial or ethnic variation.

Women and young people tend to work less than the average. As education and income increase, so does the amount of time spent working. Beyond those general patterns, we see that Asians work less than the average, Whites more.

The perceived amount of free time varies little among racial and ethnic groups. African Americans say they have slightly more free time during the week, Asians say that they have slightly less on the weekend.

Race	Total	White	African-American	Asian	Other	Hispanic
Satisfaction with life	2.6	2.6	2.8	3.0	2.6	2.7
Working hours per week	40.4	40.5	39.8	39.3	40.4	40.2
Free time hours Monday-Fri	11.7	11.8	12.7	10.7	11.4	10.6
Free time hours Weekend	12.1	12.0	12.3	11.1	14.7	11.9

TECHNICAL NOTES & SURVEY METHODOLOGY

Technical Notes

This report is based on data from 37,000 consumers in 100 newspaper markets across the United States. It is part of the Impact study, fielded during the summer of 2000 and conducted by the Readership Institute of Northwestern University.

Newspaper readers and non-readers responded to the survey. The sample was weighted for age, gender and readership based on a 2,000 person survey of non-respondents and census statistics.

This report offers a descriptive picture of U.S. media consumption including use of newspapers, magazines, television and the Internet. This report also offers a snapshot of the consumer demographics and their preferences. While “The Power to Grow Readership” identifies ways to increase readership, this report attempts only to describe the current patterns of media use.

There are 12 sections in this report. Included in each section is a table describing demographic groups and their scores as they pertain to various questions asked on the survey. Although respondents had the option of selecting a racial category (White, African American, Asian and Other) in addition to identifying Hispanic descent, they have been included in only one group for this report. All White, African American, Asian and Other respondents are non-Hispanic.

	White	African-American	Asian	Other	Hispanic
Sample Size	29343	1687	1132	802	1657
Race					
% White/caucasian	100.0	0.0	0.0	0.0	49.3
% African-American or Black	0.0	100.0	0.0	0.0	3.1
% Asian	0.0	0.0	100.0	0.0	3.3
% Other	0.0	0.0	0.0	100.0	44.3

Sampling Methodology

We use data from a multi-stage probability sample of the general U.S. population. The data were collected as part of the Impact study conducted by the Readership Institute at Northwestern University. The sample was designed to be both representative of the population and of newspapers. Technical details of the sampling procedures are given below.

The first step of the sampling process was to select a representative sample of daily newspapers in the United States. We compiled a sampling frame using lists of newspapers from the Newspaper Association of America (NAA), the Audit Bureau of Circulation (ABC) and Editor and Publisher. We excluded newspapers with the following characteristics: (1) average daily circulation under 10,000; (2) non-English language; (3) specialty newspapers such as *Investor's*

Business Daily; (4) national newspapers (i.e., *New York Times*, *Wall Street Journal*, or *USA Today*). In total, the sampling frame consisted of 846 newspapers.

We stratified the sampling frame into six strata by applying k-means clustering to structure data from ABC, household counts from the US Postal Service, and demographic data from Claritas and the US Census. In defining the strata we needed to identify the “market” for each newspaper. We defined home counties as those counties that make up 80% of total circulation. The strata were defined using the average daily circulation, number of households in the home counties, Claritas’ measure of urbanicity averaged over the home counties, number of competitive daily newspapers in the DMA, and a measure of market penetration in the home counties. Characteristics of six strata are summarized in Table 1.

We drew simple random samples without replacement from each stratum so that we would have approximately the same number of newspapers from each stratum. The final list of participating newspapers included 18 from small town, 20 from small town/city+, 14 from small city local, 17 from city local, 15 from city regional, and 17 from big city.

Stratum	N	Circ	HHs	Zips	County	Urban	Pene	Comp
Small town	278	15,464	36,529	11.9	1.3	2.0	1.3	6.2
Small town/city +	162	36,500	68,897	30.6	3.6	1.6	1.3	3.7
Small city local	184	29,763	131,281	21.8	1.3	2.9	0.8	12.0
City local	81	96,864	212,684	34.4	1.5	3.0	1.2	9.2
City regional	64	111,397	219,378	59.2	6.1	2.0	1.2	3.4
Big city	77	366,887	956,606	112.7	3.3	3.6	0.9	10.2

The second step of the sampling procedure was to draw a random sample of consumers from each of the 100 newspaper markets. We drew names randomly from the zip codes accounting for 80% of circulation within each newspaper’s home market. The sampling frame was lists of names compiled from a direct marketing list provider. We mailed 115,890 surveys between June 1, 2000 and July 15, 2000. The number of surveys mailed to each market was selected to produce approximately the same number of respondents. Surveys were allocated to zip codes within a market in proportion to a number of people living in the zip code. The individual in the household 18 years or older with the most recent birthday was asked to complete the survey. An incentive of \$3 was attached to each survey, and responders were entered into drawings for 15 cash prizes. In total 37,036 responded, giving a response rate of 37%. The distribution of the number of responses in each market was normal shaped with a mean of 337, standard deviation of 46, minimum of 271, and a maximum of 472. Response rates in individual markets varied between 25% and 50% with a standard deviation of 6%.

The last step in the sampling procedure was to do a telephone survey of nonresponders. This was done to determine if nonresponders were systematically different from responders. Over the phone, we administered an abridged version of the mail survey to a random sample of 2000 nonresponders to the mail survey, approximately 20 from each market. We found that nonresponders were more likely to be nonreaders. The results of the phone survey were accordingly used to compute sampling weights to correct for this in the main survey. It turned

out that 74% of the nonresponders were “readers,” meaning they look at a newspaper during a typical 7-day week, while 93% of responders were readers.

Respondents to the mail survey were also weighted based on age and sex to make the sample more representative. Weights were computed to reflect a random sample from the United States using data from phone survey, Claritas, and the 1990 Census.