

January 2003

Characteristics of Subscribers, Single-Copy Buyers and Passalongs

For more information:

Todd McCauley

Mary Nesbitt, m-nesbitt@northwestern.edu, 847-467-4285

Executive Summary

This report, based on data gathered from consumers in the Readership Institute's 100-market Impact study, looks at readers in terms of how they acquire the newspaper—through subscription, single copy purchase or passalong—and the characteristics associated with each type.

Method of acquisition is linked with some differences in newspaper readership, brand perceptions of the newspaper, satisfaction with content and advertising, overall media usage and demographic characteristics. Specifically:

- Single copy buyers are heavier users of other media (TV, radio, magazines, Internet) than subscribers.
- Subscribers are much heavier newspaper readers than others. They read nearly twice as many days per week, spend an average of six minutes per day longer with the paper, and read 10% more of the paper than single copy buyers and 30% more than passalongs.
- While single copy and passalongs are less intense readers, they hold quite favorable opinions of the local daily newspaper.
- Subscribers tend to be older, better educated and Caucasian as compared with single copy and passalong readers. This highlights the importance of reaching a younger, more diverse audience through single copy and passalong.
- In general, content preferences are similar across the three acquisition types. Single copy and passalongs tend to be particularly interested in education and environmental content, probably because they skew younger.
- Single copy buyers rate advertising as more important, but less satisfactory when compared with subscribers—indicating there may be an opportunity to increase single copy readership using advertising content.
- Single copy buyers also report the biggest gap between importance of and satisfaction with service issues. This may indicate an opportunity to improve services specifically for single copy buyers.

What really drives method of acquisition is beyond the scope of this study – for instance, what causes people to choose to buy single copy regularly as opposed to becoming subscribers? The Readership Institute's focus is on how to induce consumers to use the local daily newspaper more, regardless of how they acquire it. In this sense, method of acquisition is more a means to an end, rather than an end itself. Persuading a person to read a newspaper several times a week, whether it is obtained from the newsstand or the front porch, is a primary goal. If the circumstances of purchase or reading can be leveraged to induce the person to read more, so much the better.

For most local daily newspapers, single copy purchases are a comparatively small but important component of sales. This report indicates opportunities for improvement in advertising content, and also in services aimed at single copy purchasers. It also raises some other possibilities: single copy purchasers also tend to use other media heavily, indicating a role for the newspaper to “guide” these readers to other media. Single copy purchasers tend to skew younger and more diverse than subscribers, which raises implications for front-page display and point of purchase promotions.

Background

This report is based on data from 37,000 consumers in 100 local daily 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 at the Media Management Center, 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. For more details on methodology, see Appendix A.

The purpose of this report is to examine differences among newspaper subscribers, single copy buyers, and passalong readers. The analysis is based on respondents who fall exclusively into one of the three categories. Sample sizes are as follows:

1. Subscribers	13,913
2. Single Copy	2,255
3. Passalong	956
Total	17,124

For reference, the entire sample distribution is listed below. A small percentage of respondents obtain the paper differently on Sunday than they do on weekdays. They and non-readers were excluded from this analysis to get the best look possible at the differences among subscribers, single copy and passalongs.

Sunday acquisition by Weekday acquisition

			Average weekday					Total
			Do not get paper	Delivered to home	Delivered to workplace	Purchased at store, vending, etc.	Read someone else's copy	
Average sunday	Do not get paper	Count	7782	92	72	197	129	8272
		% of Total	26.1%	.3%	.2%	.7%	.4%	27.8%
	Delivered to home	Count	840	13913 ¹	179	186	262	15380
		% of Total	2.8%	46.7%	.6%	.6%	.9%	51.6%
	Delivered to workplace	Count	14	14	275		4	307
		% of Total	.0%	.0%	.9%		.0%	1.0%
	Purchased at store, vending, etc.	Count	1261	86	336	2255 ²	557	4495
		% of Total	4.2%	.3%	1.1%	7.6%	1.9%	15.1%
	Read someone else's copy	Count	180	17	86	104	956 ³	1343
		% of Total	.6%	.1%	.3%	.3%	3.2%	4.5%
	Total	Count	10077	14122	948	2742	1908	29797
		% of Total	33.8%	47.4%	3.2%	9.2%	6.4%	100.0%

Overall Media Use by Method of Acquisition

An analysis of general media usage indicates that single copy buyers tend to use a greater variety of media than do other readers. When compared to subscribers, single copy buyers:

- Watch an average of 2.5 more hours of television each week
- Listen to a wider range of radio stations and on a slightly higher number of days of the week
- Spend nearly an hour a week longer on the Internet and visit a larger variety of websites
- Read a larger number of newspapers
- Spend more time reading magazines and read a larger variety of magazines

Passalongs exhibit strong web and radio usage, but are less likely than others to spend time with other media including television, newspaper, and magazines.

	Method of acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
Total hours of TV per week	22.89	25.44	20.83
Radio-# of days in avg week	5.21	5.61	5.67
# of different radio stations	2.66	3.41	3.10
# of Hours on Internet-Personal	3.52	4.43	4.36
# of Web Sites in avg week	6.36	8.85	8.08
Avg hours/day with any paper	.74	.52	.37
Newspapers read in avg week	1.48	1.64	1.40
Hours reading mags avg week	2.49	3.12	2.08
# of different magazines	2.53	2.58	2.27

Readership

The Readership Institute measures newspaper usage through the Reader Behavior Score (RBS), which measures amount of time spent with the paper, frequency of newspaper readership, and completeness of reading. All three components are measured for both Sunday and weekday reading. Data are combined into one RBS score for each respondent. On a 1-7 scale, an RBS of 1 represents someone who rarely or never looks into the newspaper, while an RBS of 7 depicts a person who spends a great deal of time reading most of the paper, every day of the week.

Subscribers have significantly higher RBS scores than do single copy buyers (5.13 vs. 4.43) and single copy buyers have significantly higher RBS scores than do passalongs (4.43 vs. 3.46).

These findings do not necessarily imply causality. For example, the analysis does not indicate that if the local paper can entice a given single copy buyer to subscribe, s/he will begin to read more. However, it does indicate that there is a clear readership difference among the three groups—subscribers have stronger readership than single copy buyers who have stronger readership than passalongs.

		Mean	Percentile 25	Median	Percentile 75
subscriber	Local RBS score	5.13	4.62	5.40	5.90
single copy	Local RBS score	4.43	3.65	4.48	5.37
passalong	Local RBS score	3.46	2.33	3.45	4.57

* Percentiles are listed to provide information about the range of responses. For example, the 25th percentile for subscribers is 4.62, meaning that twenty-five percent of subscribers have an RBS score below 4.62. The overall range of RBS scores is much lower for passalongs. Twenty-five percent of that group falls below 2.33—a much lower score.

Frequency

In a typical week subscribers read or look into the newspaper nearly twice as many days as do other readers—6.2 days a week, compared with 3.7 for single copy buyers and 3.1 for passalongs.

Looking only at Sunday readership, over 95% of subscribers read or look into a Sunday paper in an average week, compared with 88% of single copy buyers and 69% of passalongs.

Time

Subscribers also spend more time with the newspaper than do other readers. On average they spend 34 minutes a day with the weekday paper, compared with 28 minutes for single copy buyers and 18 minutes for passalongs.

Subscribers also spend more time with the Sunday paper than do other readers, but only slightly more time than single copy buyers. Subscribers spend an estimated average¹ of 72 minutes with the Sunday paper. Single copy buyers spend nearly as much—averaging about 65 minutes per Sunday paper. Passalongs read the Sunday paper approximately 40 minutes.

The chart below highlights the distribution of time spent with the Sunday paper.

¹ Because Sunday readership was asked in categories, rather than open-ended, calculating a precise mean score is impossible. These averages were calculated by using the medians of each time category (for example the 30-60 minute category we used 45 minutes) multiplied by the total number of respondents in each category to compute a weighted average for each reader group.

Time reading local Sun NP * Method of acquisition

			Method of acquisition			Total
			subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Time reading local Sun NP	None	Count	461	117	152	730
		% within method of acquisition	3.4%	5.3%	16.3%	4.4%
	< 1/2 hour	Count	1992	390	330	2712
		% within method of acquisition	14.7%	17.7%	35.5%	16.3%
	half hour - 1 hour	Count	4453	719	250	5422
		% within method of acquisition	32.9%	32.6%	26.9%	32.5%
	1-2 hours	Count	4516	690	129	5335
		% within method of acquisition	33.3%	31.3%	13.9%	32.0%
	2-2 1/2 hours	Count	1130	184	40	1354
	% within method of acquisition	8.3%	8.4%	4.3%	8.1%	
	2 1/2-3 hours	Count	430	37	18	485
	% within method of acquisition	3.2%	1.7%	1.9%	2.9%	
	3 hours or more	Count	569	66	11	646
	% within method of acquisition	4.2%	3.0%	1.2%	3.9%	
Total		Count	13551	2203	930	16684
		% within method of acquisition	100.0%	100.0%	100.0%	100.0%

Completeness

In terms of completeness, single copy buyers are more like subscribers than they are like passalongs. Approximately three-quarters of these respondents read half the paper or more. About 40% of passalongs read that amount or more and a quarter of passalongs report they do not read any of the weekday paper in a typical week.

On average, subscribers read about 70% of a typical weekday paper. Single copy buyer and passalongs read an average of 62% and 40% of the paper respectively.²

Amount read on avg weekday * Method of acquisition

			Method of acquisition			Total
			subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Amount read on avg weekday	None	Count	649	170	239	1058
		% within Method of acquisition	4.7%	7.9%	25.6%	6.3%
	1/4	Count	1846	431	287	2564
		% within Method of acquisition	13.5%	19.9%	30.7%	15.3%
	1/2	Count	2282	428	166	2876
		% within Method of acquisition	16.7%	19.8%	17.8%	17.1%
	3/4	Count	2879	407	102	3388
		% within Method of acquisition	21.0%	18.8%	10.9%	20.2%
	Almost all/all	Count	6045	725	141	6911
		% within Method of acquisition	44.1%	33.5%	15.1%	41.1%
Total		Count	13701	2161	935	16797
		% within Method of acquisition	100.0%	100.0%	100.0%	100.0%

Sunday completion patterns are similar to those for weekly readership. Subscribers and single copy buyers tend to read fairly completely while passalongs are most likely to read substantially less.

Overall Opinions of the Local Newspaper

The Impact consumer survey included several questions aimed at discovering readers' overall perceptions of the paper. There are not major differences among how subscribers, single copy buyers, and passalongs perceive the newspaper. About 70% to 80% of respondents in each of the groups rate the paper as good or very good. Note that 15% of single copy buyers rate the newspaper as excellent (a larger percentage than subscribers who rate the paper as excellent). These findings indicate that the majority of people who

² (*Average completeness percentages are weighted averages of number of people reading multiplied by percentage of paper read. i.e., 0 *4.7% + ¼ * 13.5% + ½ * 16.7%...etc.)

choose not to subscribe to their local paper do not do so because they have negative perceptions of the paper.

Overall rating of the paper by Method of acquisition

		Method of acquisition			Total
		subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Excellent	Count	1503	332	47	1882
	% within how do you get the paper	10.9%	14.8%	5.0%	11.1%
Very Good	Count	5441	787	364	6592
	% within how do you get the paper	39.5%	35.1%	38.6%	38.8%
Good	Count	4790	797	363	5950
	% within how do you get the paper	34.7%	35.6%	38.5%	35.1%
Fair	Count	1646	275	121	2042
	% within how do you get the paper	11.9%	12.3%	12.8%	12.0%
Poor	Count	407	50	49	506
	% within how do you get the paper	3.0%	2.2%	5.2%	3.0%
Total	Count	13787	2241	944	16972
	% within how do you get the paper	100.0%	100.0%	100.0%	100.0%

Approximately 75% of subscribers, 69% of single copy buyers, and 55% of passalongs report that they would recommend the paper to a friend. Less than 4% in each group claim they definitely will not recommend the paper.

Would you recommend the paper by Method of acquisition

		Method of Acquisition			Total
		subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Definitely would recommend	Count	4021	519	94	4634
	% within how do you get the paper	29.4%	23.4%	10.0%	27.5%
Probably would recommend	Count	6292	1012	422	7726
	% within how do you get the paper	46.0%	45.6%	45.0%	45.9%
Might/might not recommend	Count	2528	482	285	3295
	% within how do you get the paper	18.5%	21.7%	30.4%	19.6%
Probably would not recommend	Count	656	159	100	915
	% within how do you get the paper	4.8%	7.2%	10.7%	5.4%
Definitely would not recommend	Count	194	45	37	276
	% within how do you get the paper	1.4%	2.0%	3.9%	1.6%
Total	Count	13691	2217	938	16846
	% within how do you get the paper	100.0%	100.0%	100.0%	100.0%

When asked to rate the value for money of the local paper, single copy buyers are the most likely to rate it as “extremely good.” This seems to indicate they get value on the days they choose to buy single copy, but the necessary total value to subscribe isn’t there. Or other factors – such as personal schedules, convenience, or living conditions – may be inhibiting a regular, heavy reading habit.

Newspaper Value by Method of Acquisition

		Method of Acquisition			Total
		subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Extremely good value	Count	994	267	43	1304
	% within method of acquisition	7.2%	11.9%	4.6%	7.7%
Very good value	Count	5542	857	261	6660
	% within method of acquisition	40.2%	38.2%	28.2%	39.3%
Somewhat good value	Count	6169	895	482	7546
	% within method of acquisition	44.8%	39.9%	52.1%	44.5%
Not a very good value	Count	929	184	109	1222
	% within method of acquisition	6.7%	8.2%	11.8%	7.2%
Not at all a good value	Count	146	38	31	215
	% within method of acquisition	1.1%	1.7%	3.3%	1.3%
Total	Count	13780	2241	926	16947
	% within method of acquisition	100.0%	100.0%	100.0%	100.0%

Brand Perceptions

The survey included three sets of questions designed to uncover readers' perceptions of the newspaper.

In all three cases, single copy buyers hold somewhat stronger brand perceptions than subscribers. (Taken in conjunction with findings from the last section, this confirms that less-intense readers of the newspaper do not have less intense or less positive impressions of it. When they use the newspaper, they find it to be a positive experience. The issue for newspapers is how to make it a more compelling experience more often.)

The first set—based on a 7-point scale—shows that newspapers receive fairly average marks. Single copy buyers have higher ratings than subscribers overall, and passalong readers fall significantly behind on nearly every category. (In general, differences of 0.10 or higher are statistically significant.)

	Method of acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Reflects personal beliefs and values	3.85	3.68	3.37
Makes me think	4.36	4.57	4.05
Is accurate	4.23	4.46	3.95
Can be used anywhere, anytime	4.78	4.93	4.50
Care about people like me	3.96	4.07	3.41
Stirs my imagination	3.62	3.80	3.35
Is relaxing to read	4.86	4.92	4.18
Has personality	4.28	4.42	3.93
Is a leader in the community	4.84	4.94	4.31
Provides valuable content on-line	3.86	4.01	3.68
Makes easy to find what I'm looking for	5.01	5.06	4.61

Average rating	4.36	4.47	3.96
----------------	------	------	------

The second set of questions—this time on a 5-point scale—asked readers to rate the newspaper on several personality traits. Single copy buyers reported the highest scores overall when rating the newspaper's personality traits. (In general, differences of 0.10 or higher are statistically significant.)

	Method of Acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Intelligent	3.78	3.88	3.55
Opinionated	3.96	3.96	3.74
Fun	3.37	3.50	3.22
Successful	3.80	3.94	3.57
Honest	3.62	3.79	3.40
Experienced	3.99	4.04	3.76
Conservative	3.35	3.53	3.33
Creative	3.38	3.51	3.25
Arrogant	2.86	2.98	2.91
Neighborly	3.79	3.82	3.59
Liberal	3.29	3.48	3.24
Helpful	3.87	3.96	3.73
Middle-Class	3.63	3.64	3.45
Energetic	3.35	3.48	3.22
Old-Fashioned	2.95	3.05	2.82
Trustworthy	3.55	3.66	3.34
Average rating	3.53	3.64	3.38

A third battery—on a five-point scale—measured the extent to which respondents link the local newspaper with a variety of values, personal characteristics, and ideals. In this case, single copy buyers score slightly (but not statistically) higher than do subscribers. Both groups rate the paper statistically higher than do passalongs.

	Method of Acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
A Sense of Belonging	3.56	3.57	3.30
Stimulation/Excitement	3.24	3.35	3.17
Warm Relationships with Others	3.20	3.28	3.08
Being Well Respected	3.48	3.59	3.27
Fun and Enjoyment of Life	3.39	3.53	3.18
Security and Peace of Mind	3.28	3.32	3.12
Self-Respect	3.32	3.41	3.17
A Sense of Accomplishment	3.38	3.52	3.20
Religious or Spiritual Fulfillment	2.92	3.06	2.85
Knowledge and Understanding	3.72	3.74	3.63
Appreciating Beauty in the World	3.37	3.41	3.27
Being Informed about World/Nation	3.96	3.95	3.80
Being Informed about Local Community	4.12	3.99	3.84

Average rating	3.46	3.52	3.30
----------------	------	------	------

Content Preferences and Satisfaction

In the Impact survey, respondents were asked to rate the importance of 26 types of content. Several topics have similar appeal across readers, whether they are subscribers, single-copy purchasers or passalongs. For example, weather, war, disasters and accidents, health, police and crime coverage received approximately the same relative importance scores. Other topics, such as sports, environment, business, and education have very different relative importance scores to the three reader groups.

Education and environment are key content areas for both passalongs and single copy buyers. These issues are in the top five for both groups but ranked lower by subscribers.

Content importance ranking by method of acquisition

	Subscriber	Single Copy	Passalong
Weather: Importance	1	1	4
Natural Disasters/Accidents: Importance	2	2	3
Politics: Importance	3	7	7
War: Importance	4	6	5
Business & Personal Finance: Importance	5	12	8
Health: Importance	6	5	6
Education: Importance	7	3	2
Environment: Importance	8	4	1
Sports: Importance	9	13	21
Police/Crime: Importance	10	10	11

The raw scores for the importance ratings are listed below. Respondents were asked to rate the importance of each category on a three point scale, where 1=little/none, 2=some, and 3=a lot.

	how do you get the paper (q36)		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Arts: Importance	2.00	2.07	1.90
Automotive: Importance	1.62	1.87	1.64
Business & Personal Finance: Importance	2.23	2.13	2.02
Community Announcements: Importance	1.88	1.93	1.84
Education: Importance	2.19	2.24	2.12
Environment: Importance	2.18	2.23	2.13
Fashion & Beauty: Importance	1.61	1.72	1.52
Food: Importance	2.01	2.07	1.81
Health: Importance	2.20	2.22	2.04
Home, Garden, & Real Estate: Importance	2.04	2.01	1.85
Jobs & Career: Importance	1.80	2.15	1.95
Movies: Importance	2.06	2.18	1.98
Natural Disasters/Accidents: Importance	2.32	2.30	2.12
Obituaries: Importance	1.89	1.86	1.68
Ordinary People: Importance	2.02	1.99	1.88
Parenting & Relationships: Imprtnce	1.89	1.99	1.85
Police/Crime: Importance	2.12	2.17	1.96
Politics: Importance	2.25	2.20	2.03
Popular Music: Importance	1.64	1.86	1.66
Religion: Importance	1.84	1.95	1.82
Science & Technology: Importance	2.11	2.17	1.99
Sports: Importance	2.14	2.10	1.82
Television: Importance	2.08	2.09	1.85
Travel: Importance	2.05	2.02	1.83
War: Importance	2.25	2.20	2.07
Weather: Importance	2.36	2.31	2.11

Content Satisfaction

Readers were also asked to rate their satisfaction with their local daily newspaper's coverage of the same 26 content topics. Although respondents rated each topic in absolute terms, we list their relative rankings here for easy comparisons.

Natural disasters / accidents, sports, and business received approximately the same relative satisfaction scores regardless of reader type. Other content categories, such as politics, community announcement, obituaries, and weather differ by reader type.

Subscribers and single copy buyers post very similar relative satisfaction scores. Passalongs rank content about movies and community announcements much higher than their counterparts. They rank politics and weather low relative to subscribers and single copy buyers.

	Subscriber	Single Copy	Passalong
Natural Disasters/Accidents: Rating	1	2	3
Sports: Rating	2	1	2
Obituaries: Rating	3	7	7
Movies: Rating	4	4	1
Weather: Rating	5	5	9
Business & Personal Finance: Rating	6	6	8
Politics: Rating	7	8	15
Home, Garden, & Real Estate: Rating	8	12	11
Community Announcements: Rating	9	10	4
Arts: Rating	10	14	12

The raw scores for the satisfaction ratings are listed below. Respondents were asked to rate their satisfaction with each topic on a 1-5 scale, where 1=poor and 5=excellent.

	how do you get the paper (q36)		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Arts: Rating	3.61	3.57	3.42
Automotive: Rating	3.48	3.61	3.44
Business & Personal Finance: Rating	3.67	3.71	3.54
Community Announcements: Rating	3.61	3.63	3.66
Education: Rating	3.42	3.49	3.33
Environment: Rating	3.38	3.38	3.22
Fashion & Beauty: Rating	3.10	3.15	3.10
Food: Rating	3.61	3.56	3.39
Health: Rating	3.41	3.46	3.22
Home, Garden, & Real Estate: Rating	3.62	3.62	3.44
Jobs & Career: Rating	3.55	3.80	3.66
Movies: Rating	3.76	3.77	3.87
Natural Disasters/Accidents: Rating	3.94	3.87	3.73
Obituaries: Rating	3.82	3.64	3.61
Ordinary People: Rating	3.32	3.25	3.16
Parenting & Relationships: Rating	3.10	3.13	3.05
Police/Crime: Rating	3.55	3.63	3.37
Politics: Rating	3.63	3.64	3.39
Popular Music: Rating	2.94	3.16	3.06
Religion: Rating	3.05	3.10	2.98
Science & Technology: Rating	3.19	3.25	3.04
Sports: Rating	3.86	3.89	3.84
Television: Rating	3.60	3.63	3.63
Travel: Rating	3.38	3.43	3.41
War: Rating	3.49	3.44	3.23
Weather: Rating	3.68	3.73	3.53

Advertising Content

Advertising is more important to single copy buyers than it is to other readers, but subscribers are more satisfied with advertising than other readers. (Both findings are statistically significant.)

	Method of acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
Importance of advertising (1-3 Scale)	2.10	2.23	2.06
Satisfaction with advertising (1-5 scale)	4.01	3.93	3.89

The analysis indicates that subscribers and single copy buyers view various kinds of advertising in very different ways. The most striking difference pertains to attitudes towards classifieds. Single copy buyers and passalongs place significantly more importance on classified ads than do subscribers. In fact, compared to subscribers, single copy buyers place more importance on all of the advertising categories measured except food ads (although differences between importance ratings for clothing, health, and store ads are minimal).

	Method of acquisition		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Ads and inserts for food: Satisfaction	4.21	4.06	3.98
Ads clothing, health, and stores: Satisfaction	4.01	3.87	3.90
Classified ads: Satisfaction	3.90	4.00	3.94
Ads entertainment sporting events: Satisfaction	3.89	3.80	3.73
Ads and inserts for food: Importance	2.31	2.29	2.06
Ads clothing, health, and stores: Importance	2.10	2.14	1.97
Classified ads: Importance	1.83	2.20	2.14
Ads entertainment sporting events: Importance	2.16	2.29	2.10

Local Newspaper Service

When it comes to service, subscribers are more satisfied with the newspaper than both single copy buyers and passalongs. Overall, subscribers rate satisfaction with service highest, followed by passalongs, and single copy buyers, respectively. Subscribers also rate the importance of service highest, followed in this case by passalongs, and finally by single copy buyers.

The overall analysis suggests that the biggest discrepancy between importance and satisfaction is among single copy buyers, suggesting that services specifically aimed at single copy buyers may be fruitful.

	how do you get the paper (q36)		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
Mean service satisfaction (1-10 scale)	7.85	6.72	7.01
Mean service importance (1-3 scale)	2.43	2.27	2.11

The overall service scores above are composite scores from eight service-related categories. Subscribers rate the newspaper higher in terms of satisfaction than other readers do on every service category measured except ease of purchase at a store or vending machine.

	how do you get the paper (q36)		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
When and how paper is delivered: Rating	8.40	6.15	7.06
The cost of home delivery: Rating	7.55	5.80	6.40
The accuracy of my bill: Rating	8.77	6.35	7.08
Customer Service: Rating	8.17	6.18	6.93
Easy to buy at store/vending machine: Rating	8.13	8.61	8.33
Condition/completeness of paper: Rating	8.53	8.02	7.93
Telemarketing calls: Rating	4.79	3.94	4.40
Quality of the paper, ink, and type size: Rating	7.86	7.29	7.60

(Note: Some questions do not pertain directly to single copy buyers and passalongs. For these and other questions, respondents were instructed that if they were unsure how to answer to indicate their overall perceptions.)

Subscribers also place more emphasis on service than do other readers. They rate every service factor except “easy to buy at stores or vending machines” (though this is not the way they typically acquire the paper so naturally it would not be as important) and “telemarketing” with higher importance scores than both single copy buyers and passalongs.

	how do you get the paper (q36)		
	subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)
	Mean	Mean	Mean
When and how paper is delivered: Importance	2.86	2.06	2.07
The cost of home delivery: Importance	2.64	2.08	2.14
The accuracy of my bill: Importance	2.77	2.16	2.21
Customer Service: Importance	2.69	2.24	2.21
Easy buy at store/vending machine: Importance	1.55	2.68	2.07
Condition/completeness of paper:Importance	2.82	2.71	2.39
Telemarketing calls: Importance	1.60	1.66	1.59
Quality of paper, ink, and type size: Importance	2.51	2.45	2.21

Demographic Differences by Methods of Acquisition

Age

Not surprisingly, age is a predictor of how people tend to get the paper. Although subscription is the most popular acquisition method for readers of every age, the percentage of subscribers steadily increases as age increases (from 64% of those under 23 to 90% of readers 60 years or older). Conversely, the percentage of readers who are single copy buyers or passalong readers decreases with age.

Age Category * Method of acquisition

		Method of acquisition			Total	
		subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)		
Age Category	<23	Count	441	177	75	693
		% within Age Category	63.6%	25.5%	10.8%	100.0%
	24-34	Count	1762	480	291	2533
		% within Age Category	69.6%	18.9%	11.5%	100.0%
	35-54	Count	5595	1031	406	7032
		% within Age Category	79.6%	14.7%	5.8%	100.0%
	55-59	Count	1094	124	39	1257
		% within Age Category	87.0%	9.9%	3.1%	100.0%
	60+	Count	4889	417	135	5441
		% within Age Category	89.9%	7.7%	2.5%	100.0%
Total		Count	13781	2229	946	16956
		% within Age Category	81.3%	13.1%	5.6%	100.0%

Gender

Gender does not seem to be a factor in how people acquire a paper. All three groups have an approximately 50-50 split between the genders.

Education

Although newspaper readers tend to have relatively high education levels to begin with, subscribers and passalongs tend to be even better educated than single copy buyers. Almost 76% of subscribers and 73% of passalongs have at least some college education while 65% of single copy buyers have any college experience.

Employment

As expected, because subscribers tend to be older than other readers, they are much more likely to be retired. However, there are no other major differences between the three groups in terms of employment.

Marital Status and Households

Compared to other readers, subscribers are more likely to be married and own (rather than rent) their homes. This is not surprising because there is a strong correlation between marital status and age.

Over 68% of subscribers are married vs. 48% of single copy buyers and 43% of passalongs. Only 15% of subscribers have never been married vs. approximately 30% of single copy buyers and passalongs.

On a related note, 90% of subscribers live in single-family homes (vs. apartments). Approximately 75% of single copy buyers and 66% of passalongs live in single-family homes.

Ethnicity

There are racial/ethnic differences in how people tend to get their newspapers. Of white readers, 84% are subscribers, 11% are single copy buyers, and 5% are passalongs. Of the Black readers, 50% are subscribers, 40% purchase single copy, and 10 read passalongs. Asians, like whites, are most likely to subscribe and have relatively fewer single copy and passalong readers. Although most Hispanics readers subscribe to the paper, over a quarter of these readers (28%) are single copy buyers.

Race * Method of acquisition

		Method of acquisition			Total
		subscriber (week and Sun)	single copy (week and Sun)	passalong (week and Sun)	
Race	White	12516 84.0%	1629 10.9%	761 5.1%	14906 100.0%
	African-American	378 50.0%	300 39.7%	78 10.3%	756 100.0%
	Asian	357 75.8%	89 18.9%	25 5.3%	471 100.0%
	Hispanic	430 69.1%	175 28.1%	17 2.7%	622 100.0%

We considered that an explanation for these results might be that Black respondents tended to be younger than White respondents, so that age was the primary factor. This is not the case. The age distribution between Black and White respondents is very similar. Asians in this sample tended to be much younger.

APPENDIX A: SURVEY 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.