

Reader Behavior Scores, local daily newspapers 2002

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Summary

As a result of the 2000 Impact study of readership, many newspapers have begun to measure RBS in their markets in addition to other readership and circulation metrics they use. Sometimes the RBS studies are done as part of other more extensive telephone survey research; sometimes they are done as a stand-alone exercise.

To support those efforts and to provide benchmarks at the national and circulation-group level, the Readership Institute carried out a telephone RBS survey of more than 3,000 respondents from the original 100 Impact newspaper markets in July of 2002. If this kind of information proves to be useful to newspapers as they work on readership initiatives, it can be repeated at intervals to track readership trends generally, among newspapers of similar sizes and in key demographic groups.

RBS was designed as a tool that would allow newspapers to fairly quickly and easily establish a baseline measurement for the frequency, completeness and amount of time consumers spend with the local daily newspaper. The idea was that newspapers could then make changes to content, brand, and/or service, and measure the effects. Being able to track changes in three dimensions of readership – frequency, time and completeness – also gives insight into where attention is needed.

Comparisons with other newspapers can be informative:

- To see what levels the top performers are currently achieving
- To assess potential to go beyond “the best”
- To see how newspapers in similar markets are faring.

But we want to stress that the most important thing is to establish a baseline and measure one’s own progress as major changes are made to the newspaper’s content, its brand and service.

Because this is the first time for a national RBS telephone survey (the Impact survey was a lengthy mail-out questionnaire that covered hundreds of questions) no trend information is available. However, even in these baseline results we can point to some results that are illuminating in themselves or bear watching in the future:

- While newspapers face significant challenges in growing readership, they continue to be a powerful medium with a very long reach. In the course of a typical week 65% read the local daily newspaper and 78% read the local, community and/or a national newspaper.
- Across the industry, RBS is 3.24 on a 1-7 scale, where 1 denotes someone who does not read the local daily newspaper and 7 represents a reader who is heavy on all three dimensions of frequency, time spent with and completeness of reading,
 - On average, newspaper readers spend about 27 minutes per day with the paper during the week and 64 minutes a day on Sunday.
 - On average, newspaper readers complete 55% of the newspaper during a typical weekday and 61% of the Sunday paper.
 - Newspaper readers are reading an average of 4.8 days per week.
- There is little variation among newspapers of different circulation size, except for papers with circulation between 100,000 and 200,000. This group has a significantly higher RBS score than others. Future research may reveal if there is something about this size of paper that results in systematically higher readership scores.
- Age is the primary demographic characteristic associated with higher readership, with higher readership seen in older groups. However, young people (18-24) do show a slight tendency to be heavier readers than do those in the next age group up (25-44 year olds).
 - A battery of lifestyle questions reveals that 18-24 year olds tend to be interested in a variety of activities traditionally associated with newspaper readership. They are particularly interested in cultural and self-improvement activities.
 - 18-24 year old newspaper readers score higher than do 25-44 year old readers on every readership element except Sunday completeness.
- Men tend to be heavier readers of the weekday newspaper, but women tend to be heavier readers of the Sunday paper.
- Other demographic factors such as gender, income and education have relatively little influence on frequency, completeness and time spent reading a newspaper—although, as has been well documented—these factors do influence whether a person is a newspaper reader in the first place or not.

How the study was conducted

The 2002 RBS Benchmark Study was conducted from July 9 to July 26 by Wilkerson and Associates in the original 100 Impact markets and comprised 3066 telephone interviews. All results have been weighted by age and gender to accurately reflect the markets included in the study.

Note: A list of the newspapers can be found at www.readership.org/impact/impact_papers_list.asp, and the questionnaire is located at www.readership.org/consumers/rbs/telephonequestionnaire.asp.

Detailed Study Results

Nationally, RBS is currently 3.24 on a 7-point scale. Overall, respondents in 100,000-200,000 circulation papers have the highest RBS. RBS scores for the other circulation groups are statistically the same.

| | Circulation Size (000) | | | | | |
|-------------------|---------------------------|-------|-------|--------|---------|------|
| | Industry | 10-25 | 25-50 | 50-100 | 100-200 | 200+ |
| RBS | 3.24 | 3.08 | 3.37 | 3.18 | 3.85 | 3.12 |
| Sample Size | 3066 | 1073 | 574 | 664 | 301 | 454 |
| Newspaper Markets | 100 | 33 | 20 | 22 | 10 | 15 |

There is no significant difference between the overall RBS of women (3.26) vs. men (3.21). As will be shown in more detail later in this report, men tend to be heavier readers of the newspaper during the week and women tend to be heavier readers of the Sunday paper.

As expected, older respondents tend to have higher RBS scores than their younger counterparts. The youngest respondents (ages 18-24) have a higher—but not statistically significant—average RBS than do 25-44 year olds. This bears watching—do newspapers have a better chance of building a stronger relationship with Generation Y than has generally been achieved with Generation X?

| | Industry | Age 18-24 | Age 25-44 | Age 45-64 | 65 or older |
|-------------|----------|-----------|-----------|-----------|-------------|
| RBS | 3.24 | 2.95 | 2.75 | 3.63 | 3.91 |
| Sample size | 3066 | 235 | 979 | 1016 | 810 |

RBS Components

The following tables highlight the individual components of RBS—time, completeness and frequency.

The tables include responses by readers only (all non-readers excluded) as well as the sample as a whole.

Frequency

In the adult population as a whole, more than 40% read on any given weekday and almost 60% read on a typical Sunday. More than a third (35%) say they do not read the local daily newspaper in a typical week. Among readers, more than 90% say they read on Sunday and approximately 65% read on any given weekday.

Behind Sunday, Friday is the most-frequently read day (70% of readers, 46% of all respondents), with Monday and Tuesday the least-read for both groups.

Typical Daily Reading

| | Readers Only | Adult Population |
|-------------------------------|--------------|------------------|
| Monday | 65% | 41% |
| Tuesday | 64% | 40% |
| Wednesday | 67% | 42% |
| Thursday | 66% | 42% |
| Friday | 70% | 46% |
| Saturday | 67% | 42% |
| Sunday | 91% | 59% |
| Do Not Read in a Typical Week | 0% | 35% |
| Avg Days Read | 4.8 days | 3.1 days |

Time Spent

On average, newspaper readers spend about 27 minutes per day with the paper during the week and 64 minutes a day on Sunday.

Weekday Time Spent Reading

| | Readers Only | Adult Population |
|---------------------|--------------|------------------|
| None or almost none | 20% | 50% |
| 1-15 minutes | 9% | 5% |
| 16-30 minutes | 30% | 19% |
| 31-45 minutes | 22% | 14% |
| 46-60 minutes | 12% | 8% |
| 61 minutes or more | 7% | 4% |
| Avg minutes | 27.0* | 16.8* |

(*Average time spent percentages are weighted averages of number of people reading multiplied by the midpoint of time spent, i.e., 0 min x 20% + 8 min. x 9% + 23 min. x 30% etc.)

Weekend/Sunday Time
Spent Reading

| | Readers Only | Adult Population |
|---------------------|--------------|------------------|
| None or almost none | 9% | 41% |
| <1/2 hour | 10% | 7% |
| half hour - 1 hour | 33% | 21% |
| 1-1 1/2 hours | 25% | 17% |
| 1 1/2 -2 hours | 12% | 7% |
| 2-2 1/2 hours | 5% | 3% |
| 2 1/2-3 hours | 3% | 2% |
| 3 or more hours | 2% | 2% |
| Avg minutes | 64.1 | 41.0 |

Completeness

On average, newspaper readers are completing more than half of the newspaper during a typical weekday (55%). Newspaper readers complete an average of 61% of the Sunday paper.

Weekday Completeness of
Reading

| | Readers Only | Adult Population |
|---------------------|--------------|------------------|
| None or almost none | 23% | 51% |
| 1/4 | 12% | 7% |
| 1/2 | 18% | 11% |
| 3/4 | 19% | 12% |
| Almost all/all | 28% | 18% |
| Avg completeness | 55%* | 34%* |

(*Average completeness percentages are weighted averages of number of people reading multiplied by percentage of paper read, i.e., 0 x 23% + 1/4 x 12% + 1/2 x 18% etc.)

Weekend/Sunday
Completeness of Reading

| | Readers Only | Adult Population |
|---------------------|--------------|------------------|
| None or almost none | 11% | 43% |
| 1/4 | 15% | 10% |
| 1/2 | 21% | 13% |
| 3/4 | 22% | 15% |
| Almost all/all | 30% | 19% |
| Avg completeness | 61% | 39% |

Total RBS

As well as measuring readership of the local daily newspaper (RBS), the Institute asked a series of questions to assess readership (time, completeness, and frequency) of others such as national and weekly newspapers. Readership of other papers was added to local daily newspaper RBS to comprise Total RBS (TRBS).

The purpose of measuring TRBS is to track how readership of the local paper compares to overall readership of all newspapers. Tracking over time could reveal any of the following:

- Increased readership of other papers (weeklies, nationals) at the expense of readership of the local daily newspaper
- Decreased or increased reading of both the daily and of other newspapers
- Increased readership of the local newspaper and decreased readership of other papers

Currently, 31% of respondents read a newspaper other than the daily local paper in a typical week. As the grid below indicates, if an “other” paper is read, about 40% of the time it is in place of the local paper (13% overall) and about 60% of the time it is in addition to the local paper (18% overall). Men, older people, and more affluent respondents are slightly more likely to read another paper, though sample sizes at this level of analysis are too small to result in statistically significant results.

Overall, 78% of adults read a newspaper in a typical week. Breakouts for readership of the local paper vs. other papers are as follows:

| Percentage of population who... | Read other papers | Do not read other papers |
|---------------------------------|-------------------|--------------------------|
| Read local paper | 18% | 43% |
| Do not read local paper | 13% | 22% |

Results indicate that readership of other papers does not seem to negatively impact RBS of the local paper. Readers who read other papers in addition to the local paper have the same RBS as those who read the local paper exclusively (4.56 vs. 4.53).

| Strength of readership among those who... | Read other papers | Do not read other papers |
|---|---|---|
| Read local paper | Average RBS: 4.56 Average TRBS: 5.79 | Average RBS: 4.53 Average TRBS: 4.53 |
| Do not read local paper | Average RBS: 1.00 Average TRBS: 3.98 | Average RBS: 1.00 Average TRBS: 1.00 |

Other Findings of Interest

Examining Lifestyles of Young People

The survey included a series of lifestyle questions. The results indicate that 18-24 year olds are interested in activities and behaviors that are traditionally associated with strong newspaper readership. They are particularly interested in involvement in cultural and self-improvement activities.

For example, when compared to 25-44 year olds, 18-24 year olds rate the following activities as more important (* indicates a statistically significant difference):

- Keeping up with state and national events
- Participating in or watching sports
- Attending arts events like concerts, live theatre and museums*
- Going to stores and shopping centers
- Taking classes or other educational activities*
- Going to movies*
- Improving fitness
- Taking vacation trips
- Doing crafts or hobbies*

Conversely, 18-24 year olds are less interested than 25-44 year olds in:

- Voting *
- Going out to dinner
- Keeping up with local events
- Keeping up with international events
- Socializing with friends
- Participating in religious activities
- Keeping in touch with relatives*
- Watching TV
- Being involved in charitable organizations
- Reading for pleasure
- Improving home and garden*
- Investing or following business developments*
- Following developments in tech and science
- Learning about or being involved in your child's education*
- Learning about the environment

Online Newspaper Readership

The print version is still the overwhelming preference of newspaper readers—10% of respondents read the online version (4% read online exclusively) vs. 57% who read only the newspaper. Over time, this survey can track online vs. print readership to see if online readership grows, and if it does, whether growth comes at the expense of newsprint readership.

| Percentage of population who... | Read the online version of the paper | Do not read the online version of the paper |
|---|---|--|
| Read the print version of the local paper | 6% | 57% |
| Do not read the print version of the local paper | 4% | 28% |

Online newspapers do not seem to affect intensity of newspaper readership. Those who read the paper online in addition to print have virtually the same RBS as those who read the print version exclusively.

| Strength of readership among those who... | Read the online version of the paper | Do not read the online version of the paper |
|--|---|--|
| Read the print version of the local paper | Average RBS: 4.51 | Average RBS: 4.50 |

Appendix 1: Summary of RBS and TRBS

| | | Count | Mean RBS | Mean TRBS |
|------------------|---------------------------------------|-------|----------|-----------|
| Gender | Male | 1446 | 3.21 | 3.99 |
| | Female | 1620 | 3.26 | 4.02 |
| Age Range | 18-24 | 235 | 2.95 | 3.14 |
| | 25-44 | 979 | 2.75 | 3.50 |
| | 45-64 | 1016 | 3.63 | 4.16 |
| | 65 or older | 810 | 3.91 | 4.70 |
| Household Income | BELOW \$25,000 | 528 | 2.95 | 3.67 |
| | \$25,000 TO \$49,999 | 835 | 3.19 | 3.87 |
| | \$50,000 TO \$74,999 | 647 | 3.07 | 4.13 |
| | \$75,000 OR MORE | 603 | 3.34 | 4.22 |
| | REFUSED | 453 | 3.68 | 4.19 |
| Education | Less than high school graduate | 206 | 2.25 | 3.33 |
| | Graduated high school (including GED) | 813 | 3.44 | 4.07 |
| | Some college | 957 | 3.24 | 3.98 |
| | Completed 4-year degree | 611 | 3.40 | 4.07 |
| | Working on or completed post graduate | 427 | 3.09 | 4.22 |

Appendix 2: RBS Components by Demographics

For additional reference, this report includes tables highlighting the components of RBS—time, frequency and completeness—by demographics among the adult population.

General Demographic Findings

The tables indicate that—not surprisingly—the demographic most responsible for differences in reading behavior is age. The oldest age group (65+) scores significantly higher than other respondents on all readership elements.

As indicated in the report, 18-24 year olds have slightly higher readership than do 25-44 year olds. However, results are statistically similar on all elements except the amount of time spent during the week. On average, 18-24 year olds spend 19 minutes per day reading the paper vs. about 11 minutes per day for 25-44 year olds. (Remember those numbers include non-readers.) The average time spent among readers is 32 minutes for 18-24 year olds and 20 minutes for 25-44 year olds.

The other demographics result in far fewer distinctions in readership behavior. Gender and income levels do not yield statistical differences in reading behavior, but females do report higher time, completeness and frequency for Sunday readership, while males report higher readership for the weekday product.

Readership behavior is generally the same across all levels of education, except those who have less than high school education. Not surprisingly, these respondents read significantly less on all measures than do those with more education.

Note: Almost 400 people refused to provide income information. Because this group was so sizeable, it is included in the data tables as a separate group. It had very high readership—significantly higher than all other income groups. Although analysis revealed that many of these respondents were older, we do not know what other characteristics or lifestyles may account for their high levels of readership and unwillingness to provide income information.

2002 Telephone Study RBS Results by Demographics—Gender and Age

| Typical Daily Reading | | | | | | | |
|-----------------------|--------------------|----------------|------------------|----------------|-----------------|----------------|--------------|
| | Industry n=3066 | Male n=1474 | Female n=1535 | 18-24 n=310 | 25-44 N=1332 | 45-64 n=769 | 65+ n=599 |
| Monday | 41.2% | 42.5% | 40.0% | 35.2% | 28.9% | 50.0% | 60.4% |
| Tuesday | 39.9% | 40.8% | 39.0% | 27.7% | 27.3% | 49.8% | 61.5% |
| Wednesday | 41.7% | 42.8% | 40.7% | 28.5% | 29.2% | 54.7% | 59.8% |
| Thursday | 41.5% | 42.3% | 40.7% | 35.0% | 28.2% | 51.7% | 61.4% |
| Friday | 45.6% | 47.8% | 43.4% | 38.4% | 34.0% | 55.4% | 62.3% |
| Saturday | 42.2% | 41.9% | 42.6% | 37.1% | 29.5% | 52.9% | 59.4% |
| Sunday | 58.6% | 56.6% | 60.4% | 50.0% | 53.5% | 64.8% | 66.2% |
| Do Not Read | 35.4% | 37.1% | 33.8% | 39.7% | 41.7% | 28.7% | 27.7% |
| Avg days read | 3.1 days | 3.1 | 3.1 | 2.5 | 2.3 | 3.8 | 4.3 |

| Weekday Time Spent | | | | | | | |
|--------------------|--------------------|----------------|------------------|----------------|-----------------|----------------|--------------|
| | Industry n=3066 | Male n=1474 | Female n=1535 | 18-24 n=310 | 25-44 N=1332 | 45-64 n=769 | 65+ n=599 |
| Do not read | 49.6% | 49.3% | 50.0% | 49.0% | 62.4% | 38.8% | 35.5% |
| 1-15 minutes | 5.4% | 6.4% | 4.4% | 4.8% | 5.7% | 7.0% | 2.8% |
| 16-30 minutes | 18.9% | 20.2% | 17.5% | 14.2% | 16.6% | 25.9% | 17.3% |
| 31-45 minutes | 13.6% | 12.0% | 15.2% | 10.3% | 8.7% | 14.2% | 25.6% |
| 46-60 minutes | 7.7% | 7.5% | 7.9% | 14.2% | 4.7% | 9.8% | 8.2% |
| 61 minutes or more | 4.2% | 4.3% | 4.1% | 5.5% | 1.7% | 3.3% | 10.4% |
| Avg minutes | 16.8 | 16.6 | 17.1 | 18.8 | 11.2 | 19.2 | 25.3 |

| Weekday Completeness | | | | | | | |
|----------------------|--------------------|----------------|------------------|----------------|-----------------|----------------|--------------|
| | Industry n=3066 | Male n=1474 | Female n=1535 | 18-24 n=310 | 25-44 N=1332 | 45-64 n=769 | 65+ n=599 |
| none | 51.3% | 50.2% | 52.5% | 50.3% | 63.5% | 41.0% | 38.1% |
| 1/4 | 7.2% | 8.2% | 6.3% | 11.0% | 6.7% | 8.5% | 4.8% |
| 1/2 | 11.1% | 10.6% | 11.5% | 17.1% | 9.1% | 12.6% | 10.4% |
| 3/4 | 11.9% | 12.6% | 11.2% | 9.0% | 9.0% | 15.2% | 15.4% |
| Almost all/all | 17.6% | 17.8% | 17.4% | 12.3% | 10.5% | 22.1% | 30.3% |
| Avg completeness | 34% | 35% | 33% | 30% | 23% | 42% | 48% |

| Weekend/Sunday Time Spent | | | | | | | |
|---------------------------|--------------------|----------------|------------------|----------------|-----------------|----------------|--------------|
| | Industry n=3066 | Male n=1474 | Female n=1535 | 18-24 n=310 | 25-44 N=1332 | 45-64 n=769 | 65+ n=599 |
| none | 41.4% | 43.4% | 39.6% | 50.0% | 46.5% | 35.2% | 33.8% |
| <1/2 hour | 6.6% | 5.8% | 7.4% | 8.7% | 7.4% | 5.1% | 5.7% |
| half hour - 1 hour | 20.7% | 22.6% | 18.9% | 17.7% | 20.4% | 25.5% | 17.1% |
| 1-1 1/2 hours | 17.2% | 15.6% | 18.8% | 11.3% | 16.7% | 18.3% | 20.1% |
| 1 1/2 -2 hours | 7.4% | 6.8% | 8.0% | 1.3% | 5.5% | 10.1% | 11.4% |
| 2-2 1/2 hours | 3.1% | 2.9% | 3.3% | 2.9% | 1.7% | 4.0% | 5.2% |
| 2 1/2-3 hours | 1.8% | 1.6% | 1.9% | 3.9% | 1.2% | 0.5% | 3.5% |
| 3 or more hours | 1.5% | 1.1% | 1.8% | 4.2% | 0.5% | 1.0% | 3.0% |
| Avg minutes | 41.0 | 38.6 | 43.2 | 37.3 | 33.6 | 44.9 | 54.0 |

| Weekend/Sunday Completeness | | | | | | | |
|-----------------------------|--------------------|----------------|------------------|----------------|-----------------|----------------|--------------|
| | Industry n=3066 | Male n=1474 | Female n=1535 | 18-24 n=310 | 25-44 N=1332 | 45-64 n=769 | 65+ n=599 |
| none | 42.7% | 44.2% | 41.4% | 52.1% | 47.7% | 35.9% | 35.8% |
| 1/4 | 9.6% | 10.4% | 8.7% | 10.7% | 9.5% | 11.2% | 7.0% |
| 1/2 | 13.4% | 10.9% | 15.7% | 11.3% | 13.0% | 13.0% | 15.7% |
| 3/4 | 15.1% | 16.0% | 14.1% | 11.3% | 14.0% | 19.1% | 14.2% |
| Almost all/all | 19.0% | 18.5% | 19.5% | 14.6% | 15.3% | 20.8% | 27.1% |
| Avg completeness | 39% | 39% | 40% | 31% | 35% | 44% | 47% |

2002 Telephone Study RBS Results by Demographics—Annual Income

Typical Daily Reading

| | Industry n=3066 | BELOW \$25K n=377 | \$25 TO \$49K n=777 | \$50 TO \$74K n=709 | \$75K+ n=754 | REFUSED n=392 |
|---------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| Monday | 41.2% | 36.3% | 39.3% | 36.4% | 44.6% | 52.0% |
| Tuesday | 39.9% | 35.0% | 38.7% | 32.3% | 44.0% | 52.6% |
| Wednesday | 41.7% | 36.5% | 42.7% | 34.7% | 44.3% | 52.8% |
| Thursday | 41.5% | 36.9% | 38.6% | 33.6% | 46.2% | 56.9% |
| Friday | 45.6% | 37.6% | 43.0% | 42.9% | 48.0% | 58.4% |
| Saturday | 42.2% | 36.9% | 37.7% | 39.1% | 44.4% | 58.2% |
| Sunday | 58.6% | 49.2% | 56.4% | 59.1% | 62.3% | 63.5% |
| Do Not Read | 35.4% | 44.4% | 36.2% | 34.6% | 33.8% | 29.9% |
| Avg days read | 3.1 days | 2.7 | 3 | 2.8 | 3.3 | 3.9 |

Weekday Time Spent

| | Industry n=3066 | BELOW \$25K n=377 | \$25 TO \$49K n=777 | \$50 TO \$74K n=709 | \$75K+ n=754 | REFUSED n=392 |
|--------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| Do not read | 49.6% | 54.1% | 51.0% | 54.6% | 47.8% | 36.9% |
| 1-15 minutes | 5.4% | 4.2% | 4.9% | 6.5% | 6.8% | 3.1% |
| 16-30 minutes | 18.9% | 10.9% | 18.4% | 16.8% | 22.3% | 24.4% |
| 31-45 minutes | 13.6% | 17.2% | 13.5% | 10.6% | 12.4% | 18.3% |
| 46-60 minutes | 7.7% | 5.6% | 5.0% | 9.2% | 7.8% | 12.0% |
| 61 minutes or more | 4.2% | 6.1% | 5.9% | 2.3% | 2.9% | 5.1% |
| Avg minutes | 16.8 | 16.5 | 16.4 | 14.7 | 16.4 | 22.6 |

Weekday Completeness

| | Industry n=3066 | BELOW \$25K n=377 | \$25 TO \$49K n=777 | \$50 TO \$74K n=709 | \$75K+ n=754 | REFUSED n=392 |
|------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 51.3% | 56.0% | 53.3% | 55.4% | 49.4% | 39.6% |
| 1/4 | 7.2% | 8.2% | 6.9% | 8.1% | 6.4% | 6.6% |
| 1/2 | 11.1% | 12.2% | 8.1% | 11.7% | 11.5% | 13.8% |
| 3/4 | 11.9% | 5.6% | 12.2% | 9.5% | 14.4% | 16.9% |
| Almost all/all | 17.6% | 17.8% | 18.7% | 15.0% | 16.2% | 22.5% |
| Avg completeness | 34% | 30% | 34% | 30% | 34% | 44% |

Weekend/Sunday Time Spent

| | Industry n=3066 | BELOW \$25K n=377 | \$25 TO \$49K n=777 | \$50 TO \$74K n=709 | \$75K+ n=754 | REFUSED n=392 |
|--------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 41.4% | 50.8% | 43.6% | 40.9% | 37.6% | 36.5% |
| <1/2 hour | 6.6% | 7.7% | 6.4% | 8.5% | 4.4% | 7.1% |
| half hour - 1 hour | 20.7% | 18.3% | 18.7% | 16.8% | 25.0% | 26.0% |
| 1-1 1/2 hours | 17.2% | 11.4% | 16.5% | 20.7% | 18.8% | 15.1% |
| 1 1/2 -2 hours | 7.4% | 5.8% | 8.2% | 7.2% | 8.5% | 5.9% |
| 2-2 1/2 hours | 3.1% | 3.2% | 3.3% | 2.1% | 3.0% | 4.3% |
| 2 1/2-3 hours | 1.8% | 2.1% | 1.9% | 1.0% | 1.1% | 3.8% |
| 3 or more hours | 1.5% | 0.8% | 1.0% | 2.5% | 1.5% | 1.3% |
| Avg minutes | 41.0 | 33.3 | 40.0 | 41.2 | 43.5 | 44.8 |

Weekend/Sunday Completeness

| | Industry n=3066 | BELOW \$25K n=377 | \$25 TO \$49K n=777 | \$50 TO \$74K n=709 | \$75K+ n=754 | REFUSED n=392 |
|------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 42.7% | 52.3% | 45.0% | 41.7% | 38.3% | 39.6% |
| 1/4 | 9.6% | 8.2% | 8.0% | 14.0% | 9.0% | 7.2% |
| 1/2 | 13.4% | 9.5% | 14.0% | 9.3% | 18.0% | 13.8% |
| 3/4 | 15.1% | 11.4% | 13.5% | 17.4% | 14.3% | 18.9% |
| Almost all/all | 19.0% | 18.6% | 19.3% | 16.7% | 20.3% | 20.5% |
| Avg completeness | 39% | 34% | 38% | 38% | 42% | 43% |

2002 Telephone Study RBS Results by Demographics--Education

Typical Daily Reading

| | Industry n=3066 | <HS Grad n=175 | HS Grad n=615 | Some College n=1008 | College Grad n=695 | Post Grad n=492 |
|---------------|--------------------|-------------------|------------------|------------------------|-----------------------|--------------------|
| Monday | 41.2% | 22.9% | 47.0% | 40.1% | 42.3% | 39.6% |
| Tuesday | 39.9% | 24.1% | 47.5% | 37.6% | 41.7% | 37.0% |
| Wednesday | 41.7% | 23.4% | 48.8% | 40.2% | 43.8% | 38.8% |
| Thursday | 41.5% | 24.0% | 49.4% | 37.5% | 43.5% | 42.5% |
| Friday | 45.6% | 25.1% | 50.1% | 45.8% | 48.1% | 42.3% |
| Saturday | 42.2% | 25.1% | 47.2% | 41.4% | 45.7% | 38.2% |
| Sunday | 58.6% | 34.5% | 60.3% | 59.2% | 65.5% | 53.3% |
| Do Not Read | 35.4% | 63.2% | 33.1% | 33.1% | 31.1% | 39.8% |
| Avg days read | 3.1 days | 1.8 | 3.5 | 3 | 3.3 | 2.9 |

Weekday Time Spent

| | Industry n=3066 | <HS Grad n=175 | HS Grad n=615 | Some College n=1008 | College Grad n=695 | Post Grad n=492 |
|--------------------|--------------------|-------------------|------------------|------------------------|-----------------------|--------------------|
| Do not read | 49.6% | 72.4% | 44.1% | 50.4% | 47.6% | 51.0% |
| 1-15 minutes | 5.4% | 4.0% | 3.1% | 7.0% | 5.2% | 5.9% |
| 16-30 minutes | 18.9% | 5.2% | 20.3% | 16.7% | 22.5% | 20.5% |
| 31-45 minutes | 13.6% | 11.5% | 18.5% | 12.3% | 14.8% | 8.3% |
| 46-60 minutes | 7.7% | 2.3% | 7.6% | 8.3% | 7.1% | 8.9% |
| 61 minutes or more | 4.2% | 4.0% | 5.7% | 4.6% | 2.9% | 4.1% |
| Avg minutes | 16.8 | 9.8 | 19.9 | 16.5 | 16.9 | 15.8 |

Weekday Completeness

| | Industry n=3066 | <HS Grad n=175 | HS Grad n=615 | Some College n=1008 | College Grad n=695 | Post Grad n=492 |
|------------------|--------------------|-------------------|------------------|------------------------|-----------------------|--------------------|
| none | 51.3% | 75.9% | 45.2% | 52.2% | 49.1% | 52.3% |
| 1/4 | 7.2% | 4.0% | 9.1% | 7.0% | 7.1% | 6.7% |
| 1/2 | 11.1% | 4.0% | 10.9% | 12.2% | 11.3% | 10.6% |
| 3/4 | 11.9% | 3.4% | 15.6% | 11.4% | 13.1% | 10.0% |
| Almost all/all | 17.6% | 12.6% | 18.5% | 16.8% | 17.3% | 19.6% |
| Avg completeness | 34% | 18% | 38% | 33% | 35% | 34% |

Weekend/Sunday Time Spent

| | Industry n=3066 | <HS Grad n=175 | HS Grad n=615 | Some College n=1008 | College Grad n=695 | Post Grad n=492 |
|--------------------|--------------------|-------------------|------------------|------------------------|-----------------------|--------------------|
| none | 41.4% | 65.9% | 39.6% | 40.8% | 34.5% | 46.8% |
| <1/2 hour | 6.6% | 9.2% | 6.8% | 5.4% | 6.0% | 8.1% |
| half hour - 1 hour | 20.7% | 8.7% | 21.9% | 19.2% | 25.8% | 18.9% |
| 1-1 1/2 hours | 17.2% | 8.7% | 15.3% | 19.5% | 21.3% | 12.8% |
| 1 1/2 -2 hours | 7.4% | 1.7% | 9.7% | 6.8% | 7.2% | 8.1% |
| 2-2 1/2 hours | 3.1% | 5.8% | 1.8% | 4.6% | 1.9% | 2.6% |
| 2 1/2-3 hours | 1.8% | 0.0% | 3.2% | 1.8% | 1.3% | 1.0% |
| 3 or more hours | 1.5% | 0.0% | 1.3% | 1.7% | 1.9% | 1.2% |
| Avg minutes | 41.0 | 21.4 | 42.8 | 43.6 | 44.2 | 35.5 |

Weekend/Sunday Completeness

| | Industry n=3066 | <HS Grad n=175 | HS Grad n=615 | Some College n=1008 | College Grad n=695 | Post Grad n=492 |
|------------------|--------------------|-------------------|------------------|------------------------|-----------------------|--------------------|
| none | 42.7% | 69.0% | 40.5% | 41.8% | 35.7% | 48.0% |
| 1/4 | 9.6% | 7.5% | 9.3% | 10.2% | 10.2% | 7.7% |
| 1/2 | 13.4% | 9.8% | 9.9% | 13.0% | 18.3% | 12.8% |
| 3/4 | 15.1% | 1.7% | 18.2% | 16.1% | 16.4% | 12.4% |
| Almost all/all | 19.0% | 12.1% | 22.0% | 18.2% | 19.4% | 19.1% |
| Avg completeness | 39% | 20% | 43% | 39% | 43% | 37% |

Appendix 3—RBS Component Averages by Readers Only

When non-readers are removed from the sample, males have a higher RBS score than do women. Analysis indicates that males are more likely to be non-readers, but male readers are heavier readers. Females, conversely, are less likely to be non-readers, but generally read less frequently, spend less time, and read less completely during the week. Similar to the overall results, female readers are stronger Sunday readers than are male readers.

When looking exclusively at readers, age again reveals some interesting reading behaviors. While the 18-24 group is small (129 respondents), results again show that this group of readers are quite solid. Although frequency and completeness are lower than their older counterparts, they are spending an average of 32 minutes with the weekday paper and 64 minutes with the Sunday paper—second only to 65+ year olds. On every measure except Sunday completeness, 18-24 year olds demonstrate stronger readership scores than 25-44 year olds. Sixty five + year old readers lead all readers in every category by statistically significant margins.

As we saw in the total market analysis, education and income do correlate to overall RBS. However, the reader-only analysis indicates that these characteristics do not produce statistically different results for time, frequency or completeness of readership. Simply put, once someone is reading the newspaper, income and education don't substantially change HOW he or she reads the paper.

| | Readers Only Adult Population | |
|-------------------------|-------------------------------|------|
| RBS | 4.54 | 3.24 |
| Sample Size | 2046 | 3066 |
| Male | 4.62 | 3.21 |
| Female | 4.47 | 3.26 |
| Age 18-24 | 4.28 | 2.95 |
| Age 25-44 | 4.14 | 2.75 |
| Age 45-64 | 4.74 | 3.63 |
| 65 or older | 5.06 | 3.91 |
| BELOW \$25,000 | 4.58 | 2.95 |
| \$25,000 TO \$49,999 | 4.49 | 3.19 |
| \$50,000 TO \$74,999 | 4.33 | 3.07 |
| \$75,000 OR MORE | 4.58 | 3.34 |
| REFUSED | 4.36 | 3.68 |
| < High School graduate | 4.38 | 2.25 |
| High school grad or GED | 4.68 | 3.44 |
| Some college | 4.47 | 3.24 |
| Completed 4-year degree | 4.53 | 3.40 |
| Graduate work or degree | 4.54 | 3.09 |

* Readers are defined as anyone with an RBS score greater than 1.0.

2002 Telephone RBS Results by Demographics—Readers Only

Typical Daily Reading

| | Industry n=2046 | Male n=944 | Female n=1102 | 18-24 n=129 | 25-44 n=575 | 45-64 n=718 | 65+ n=610 |
|---------------|--------------------|---------------|------------------|----------------|----------------|----------------|--------------|
| Monday | 65% | 71% | 60% | 57% | 52% | 71% | 83% |
| Tuesday | 64% | 69% | 59% | 47% | 49% | 72% | 85% |
| Wednesday | 67% | 72% | 62% | 49% | 53% | 79% | 82% |
| Thursday | 66% | 71% | 62% | 56% | 51% | 75% | 85% |
| Friday | 70% | 74% | 66% | 66% | 55% | 78% | 86% |
| Saturday | 67% | 70% | 65% | 63% | 53% | 76% | 82% |
| Sunday | 91% | 90% | 92% | 82% | 92% | 92% | 92% |
| Do Not Read | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Avg days read | 4.8 | 5.2 | 4.6 | 4.2 | 4.0 | 5.4 | 5.9 |

Weekday Time Spent

| | Industry n=2046 | Male n=944 | Female n=1102 | 18-24 n=129 | 25-44 n=575 | 45-64 n=718 | 65+ n=610 |
|--------------------|--------------------|---------------|------------------|----------------|----------------|----------------|--------------|
| Do not read | 20% | 14% | 25% | 16% | 32% | 13% | 11% |
| 1-15 minutes | 9% | 11% | 7% | 8% | 11% | 10% | 4% |
| 16-30 minutes | 30% | 34% | 27% | 24% | 30% | 38% | 24% |
| 31-45 minutes | 22% | 20% | 23% | 18% | 15% | 21% | 35% |
| 46-60 minutes | 12% | 13% | 12% | 24% | 8% | 14% | 12% |
| 61 minutes or more | 7% | 7% | 6% | 9% | 3% | 5% | 14% |
| Avg minutes | 27.0 | 28.1 | 26.0 | 32.2 | 20.1 | 28.0 | 35.1 |

Weekday Completeness

| | Industry n=2046 | Male n=944 | Female n=1102 | 18-24 n=129 | 25-44 n=575 | 45-64 n=718 | 65+ n=610 |
|------------------|--------------------|---------------|------------------|----------------|----------------|----------------|--------------|
| none | 23% | 16% | 29% | 18% | 34% | 15% | 15% |
| 1/4 | 12% | 14% | 10% | 19% | 13% | 12% | 7% |
| 1/2 | 18% | 18% | 18% | 26% | 17% | 19% | 15% |
| 3/4 | 19% | 21% | 18% | 16% | 17% | 22% | 22% |
| Almost all/all | 28% | 30% | 27% | 21% | 19% | 32% | 42% |
| Avg completeness | 55% | 59% | 51% | 51% | 43% | 61% | 67% |

Weekend/Sunday Time Spent

| | Industry n=2046 | Male n=944 | Female n=1102 | 18-24 n=129 | 25-44 n=575 | 45-64 n=718 | 65+ n=610 |
|--------------------|--------------------|---------------|------------------|----------------|----------------|----------------|--------------|
| none | 9.2% | 10% | 8% | 18% | 8% | 8% | 8% |
| <1/2 hour | 10.3% | 10% | 11% | 12% | 14% | 7% | 8% |
| half hour - 1 hour | 33.0% | 37% | 29% | 30% | 37% | 36% | 24% |
| 1-1 1/2 hours | 25.2% | 22% | 28% | 19% | 24% | 26% | 28% |
| 1 1/2 -2 hours | 11.9% | 11% | 12% | 2% | 10% | 15% | 15% |
| 2-2 1/2 hours | 5.1% | 5% | 5% | 5% | 3% | 6% | 7% |
| 2 1/2-3 hours | 2.9% | 3% | 3% | 7% | 2% | 1% | 5% |
| 3 or more hours | 2.4% | 2% | 3% | 7% | 1% | 2% | 4% |
| Avg minutes | 64.1 | 61.4 | 66.5 | 63.5 | 57.3 | 64.4 | 75.1 |

Weekend/Sunday Completeness

| | Industry n=2046 | Male n=944 | Female n=1102 | 18-24 n=129 | 25-44 n=575 | 45-64 n=718 | 65+ n=610 |
|------------------|--------------------|---------------|------------------|----------------|----------------|----------------|--------------|
| none | 11.2% | 11.6% | 10.9% | 21.0% | 10.4% | 9.2% | 11.1% |
| 1/4 | 15.1% | 16.9% | 13.5% | 18.2% | 17.8% | 14.7% | 10.0% |
| 1/2 | 20.9% | 18.1% | 23.4% | 16.6% | 22.8% | 18.9% | 22.0% |
| 3/4 | 22.3% | 22.6% | 22.1% | 19.3% | 20.5% | 27.7% | 19.7% |
| Almost all/all | 30.4% | 30.8% | 30.0% | 24.9% | 28.4% | 29.6% | 37.2% |
| Avg completeness | 61.4% | 61% | 62% | 52% | 60% | 63% | 65% |

2002 Telephone RBS Results by Demographics—Readers Only

Typical Daily Reading

| | Industry n=2046 | BELOW \$25K n=326 | \$25 TO \$49K n=551 | \$50 TO \$74K n=453 | \$75K+ n=402 | REFUSED n=314 |
|---------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| Monday | 65% | 66% | 62% | 61% | 67% | 75% |
| Tuesday | 64% | 66% | 62% | 54% | 66% | 75% |
| Wednesday | 67% | 68% | 68% | 58% | 66% | 76% |
| Thursday | 66% | 67% | 62% | 56% | 70% | 82% |
| Friday | 70% | 70% | 67% | 61% | 71% | 84% |
| Saturday | 67% | 69% | 60% | 65% | 66% | 83% |
| Sunday | 91% | 89% | 90% | 89% | 94% | 91% |
| Do Not Read | 0% | 0% | 0% | 0% | 0% | 0% |
| Avg days read | 4.8 | 4.9 | 4.7 | 4.5 | 5.0 | 5.7 |

Weekday Time Spent

| | Industry n=2046 | BELOW \$25K n=326 | \$25 TO \$49K n=551 | \$50 TO \$74K n=453 | \$75K+ n=402 | REFUSED n=314 |
|--------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| Do not read | 20.0% | 17% | 23% | 23% | 21% | 10% |
| 1-15 minutes | 8.9% | 8% | 8% | 11% | 11% | 4% |
| 16-30 minutes | 30.4% | 21% | 30% | 29% | 34% | 35% |
| 31-45 minutes | 21.6% | 32% | 22% | 19% | 17% | 26% |
| 46-60 minutes | 12.2% | 11% | 8% | 14% | 12% | 17% |
| 61 minutes or more | 6.9% | 12% | 10% | 4% | 5% | 7% |
| Avg minutes | 27.0 | 31.0 | 26.5 | 24.5 | 24.7 | 32.3 |

Weekday Completeness

| | Industry n=2046 | BELOW \$25K n=326 | \$25 TO \$49K n=551 | \$50 TO \$74K n=453 | \$75K+ n=402 | REFUSED n=314 |
|------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 22.7% | 21% | 26% | 25% | 24% | 14% |
| 1/4 | 11.8% | 16% | 11% | 14% | 10% | 10% |
| 1/2 | 17.9% | 20% | 13% | 21% | 18% | 20% |
| 3/4 | 19.4% | 11% | 20% | 16% | 23% | 24% |
| Almost all/all | 28.2% | 33% | 30% | 25% | 25% | 32% |
| Avg completeness | 55% | 55% | 54% | 50% | 54% | 63% |

Weekend/Sunday Time Spent

| | Industry n=2046 | BELOW \$25K n=326 | \$25 TO \$49K n=551 | \$50 TO \$74K n=453 | \$75K+ n=402 | REFUSED n=314 |
|--------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 9.2% | 11% | 10% | 11% | 6% | 9% |
| <1/2 hour | 10.3% | 12% | 11% | 15% | 6% | 10% |
| half hour - 1 hour | 33.0% | 34% | 30% | 27% | 39% | 37% |
| 1-1 1/2 hours | 25.2% | 21% | 26% | 25% | 28% | 21% |
| 1 1/2 -2 hours | 11.9% | 11% | 13% | 13% | 13% | 8% |
| 2-2 1/2 hours | 5.1% | 6% | 5% | 4% | 5% | 6% |
| 2 1/2-3 hours | 2.9% | 4% | 3% | 2% | 2% | 6% |
| 3 or more hours | 2.4% | 2% | 2% | 4% | 2% | 2% |
| Avg minutes | 64.1 | 61.9 | 64.1 | 62.6 | 66.3 | 64.1 |

Weekend/Sunday Completeness

| | Industry n=2046 | BELOW \$25K n=326 | \$25 TO \$49K n=551 | \$50 TO \$74K n=453 | \$75K+ n=402 | REFUSED n=314 |
|------------------|--------------------|----------------------|------------------------|------------------------|-----------------|------------------|
| none | 11.2% | 14.0% | 12.1% | 12.3% | 7.1% | 13.6% |
| 1/4 | 15.1% | 15.5% | 13.1% | 22.7% | 13.5% | 9.9% |
| 1/2 | 20.9% | 15.0% | 22.6% | 16.0% | 26.5% | 19.9% |
| 3/4 | 22.3% | 21.5% | 21.8% | 20.0% | 22.3% | 27.2% |
| Almost all/all | 30.4% | 34.0% | 30.4% | 28.9% | 30.6% | 29.4% |
| Avg completeness | 61% | 62% | 61% | 58% | 64% | 62% |

2002 Telephone RBS Results by Demographics--Readers Only

Typical Daily Reading

| | Industry n=2046 | <HS Grad n=115 | HS Grad n=550 | Some College n=652 | College Grad n=411 | Post Grad n=283 |
|---------------|--------------------|-------------------|------------------|-----------------------|-----------------------|--------------------|
| Monday | 65% | 61% | 71% | 65% | 62% | 65% |
| Tuesday | 64% | 65% | 71% | 61% | 61% | 63% |
| Wednesday | 67% | 63% | 73% | 65% | 64% | 66% |
| Thursday | 66% | 64% | 74% | 61% | 63% | 70% |
| Friday | 70% | 67% | 75% | 66% | 69% | 71% |
| Saturday | 67% | 67% | 70% | 67% | 66% | 65% |
| Sunday | 91% | 92% | 90% | 89% | 95% | 89% |
| Do Not Read | 0% | 0% | 0% | 0% | 0% | 0% |
| Avg days read | 4.8 | 4.8 | 5.2 | 4.7 | 4.8 | 4.9 |

Weekday Time Spent

| | Industry n=2046 | <HS Grad n=115 | HS Grad n=550 | Some College n=652 | College Grad n=411 | Post Grad n=283 |
|--------------------|--------------------|-------------------|------------------|-----------------------|-----------------------|--------------------|
| Do not read | 20.0% | 25.4% | 16.5% | 20.0% | 23.8% | 18.1% |
| 1-15 minutes | 8.9% | 11.1% | 4.5% | 11.8% | 7.9% | 10.3% |
| 16-30 minutes | 30.4% | 14.3% | 30.9% | 27.6% | 32.5% | 35.6% |
| 31-45 minutes | 21.6% | 31.7% | 27.7% | 20.5% | 20.7% | 13.2% |
| 46-60 minutes | 12.2% | 6.3% | 11.7% | 12.7% | 10.7% | 15.7% |
| 61 minutes or more | 6.9% | 11.1% | 8.7% | 7.3% | 4.4% | 7.1% |
| Avg minutes | 27.0 | 27.0 | 30.1 | 26.7 | 24.6 | 27.0 |

Weekday Completeness

| | Industry n=2046 | <HS Grad n=115 | HS Grad n=550 | Some College n=652 | College Grad n=411 | Post Grad n=283 |
|------------------|--------------------|-------------------|------------------|-----------------------|-----------------------|--------------------|
| none | 22.7% | 34.4% | 18.2% | 22.4% | 26.0% | 20.7% |
| 1/4 | 11.8% | 10.9% | 14.0% | 11.8% | 10.7% | 11.8% |
| 1/2 | 17.9% | 10.9% | 16.7% | 20.4% | 17.1% | 16.4% |
| 3/4 | 19.4% | 9.4% | 23.4% | 18.7% | 19.9% | 17.5% |
| Almost all/all | 28.2% | 34.4% | 27.7% | 26.8% | 26.3% | 33.6% |
| Avg completeness | 55% | 50% | 57% | 54% | 52% | 58% |

Weekend/Sunday Time Spent

| | Industry n=2046 | <HS Grad n=115 | HS Grad n=550 | Some College n=652 | College Grad n=411 | Post Grad n=283 |
|--------------------|--------------------|-------------------|------------------|-----------------------|-----------------------|--------------------|
| none | 9.2% | 7.8% | 10.0% | 11.3% | 4.8% | 11.0% |
| <1/2 hour | 10.3% | 25.0% | 10.2% | 8.8% | 8.5% | 12.5% |
| half hour - 1 hour | 33.0% | 23.4% | 32.6% | 30.8% | 37.8% | 32.4% |
| 1-1 1/2 hours | 25.2% | 23.4% | 22.6% | 24.7% | 30.3% | 22.4% |
| 1 1/2 -2 hours | 11.9% | 4.7% | 14.9% | 10.9% | 10.9% | 13.2% |
| 2-2 1/2 hours | 5.1% | 15.6% | 2.7% | 7.6% | 2.8% | 4.6% |
| 2 1/2-3 hours | 2.9% | 0.0% | 5.0% | 3.0% | 2.0% | 1.8% |
| 3 or more hours | 2.4% | 0.0% | 2.0% | 2.8% | 2.8% | 2.1% |
| Avg minutes | 64.1 | 57.9 | 64.5 | 65.8 | 64.9 | 60.3 |

Weekend/Sunday Completeness

| | Industry n=2046 | <HS Grad n=115 | HS Grad n=550 | Some College n=652 | College Grad n=411 | Post Grad n=283 |
|------------------|--------------------|-------------------|------------------|-----------------------|-----------------------|--------------------|
| none | 11.2% | 17.2% | 11.2% | 12.7% | 6.6% | 12.9% |
| 1/4 | 15.1% | 20.3% | 14.1% | 16.1% | 14.2% | 13.6% |
| 1/2 | 20.9% | 26.6% | 14.9% | 21.4% | 25.5% | 20.4% |
| 3/4 | 22.3% | 4.7% | 27.5% | 20.0% | 24.5% | 21.8% |
| Almost all/all | 30.4% | 31.3% | 32.3% | 29.8% | 29.3% | 31.4% |
| Avg completeness | 61% | 53% | 64% | 60% | 64% | 61% |

Appendix 4—RBS Methodologies

The Readership Institute conducted the original Impact Study in the summer of 2000. The consumer study consisted of over 400 questions and can be found at <http://www.readership.org/consumers/survey/main.htm>. We measured a wide variety of attitudes, behaviors and opinions about newspaper—among them were the RBS questions. Due to the length and sample size (over 37,000 respondents) of the survey, a mail-out methodology was the only practical and cost-effective way to administer the survey.

However, phone surveys are the methodology of choice for most newspapers and can be worked into existing research plans. As of this publication, more than 150 newspapers have either conducted or plan to conduct their own RBS studies and the vast majority—if not all—are conducting telephone surveys.

As a result, RI launched its own telephone RBS study with the express purpose of providing the industry with a solid benchmark using the same methodology that the industry as a whole is using.

Although we had no way of know what kind of methodology bias is involved between mail and telephone surveys, it is now apparent from the results of our two studies that telephone studies result in lower RBS scores than do mail studies. The original mail survey resulted in an average consumer RBS score of 3.54 (the average RBS of the 37,000 respondents) and a newspaper RBS of 3.66 (the average RBS score of the 100 newspapers in the study). As indicated in this report, the average RBS for the 2002 telephone RBS is 3.24. (We do not have enough respondents per paper to calculate an average newspaper RBS score.)

There is no way to know the precise “correction factor” needed to compare mail vs. phone surveys short of conducting simultaneous phone and mail RBS studies in the same markets. Given the fact that mail surveys are not frequently conducted, there is question as to whether knowing the difference between the two methodologies is even useful.

RI is now conducting on-going RBS studies by telephone and those interested in comparing their results to a national average can do so. Over time RI will have trend information as well. As RI and newspapers measure RBS using a consistent methodology over time, we can measure the relative change year-to-year. The next industry-wide RBS study will be conducted in early 2003.