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COMPETITIVE MEDIA

Newspaper

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The U.S. newspaper industry has history going all the way back to the colonies. Newspapers enjoyed a long reign not only as the primary source of news and information, but also as the main advertising vehicle for brands, retailers, and even individuals within their markets.

Newspaper publishers faced and survived major challenges over the years from short broadcast newscasts on radio and TV, radio all-news formats, television news programs, and 24-hour cable news channel cycles, retaining subscribers and revenue streams.

In the 21st century, however, online and digital platforms affording real-time news coverage – including personalized news delivery – have made immediacy the order of the day. Publishers literally are faced with an “adapt or die” proposition. Some are adapting innovative strategies to expand their digital services to the consumer – others have closed down.

Newspaper Counts and Circulation

Fewer newspapers were published in 2015 than ten years ago, and circulation has declined dramatically:

- Daily Newspapers (published 4 or more days per week)
 - There were 1,331 daily papers and 934 Sunday papers as of January 1, 2015;
 - There were 1,457 daily papers and 915 Sunday papers in February '05
 - Combined circulation of all dailies in 2015 is 40.4M; Sunday, 42.7M;
 - Combined circulation of all dailies in '05 was 54.6M; Sunday, 55.2M
- Weekly Newspapers (published 1-3 days per week)
 - There were 5,740 weekly papers as of 1/1/15 (5,157 publish once a week)
 - There were 6,659 weekly papers in February '05 (6,086 published once a week)
 - Combined circulation of all weeklies in 2015 is 49.5M
 - Combined circulation of all weeklies in 2005 was 49.5M
- Shoppers/Total Market Coverage (TMC) (Publications with less than 25% editorial content)
 - There were 1,365 shopper/TMC publications as of January 1, 2015
 - There were 1,417 shopper/TMC publications in February '05
 - Total circulation of all shoppers/TMC publications in 2015 is 60.0M
 - Total circulation of all shoppers/TMC publications in 2005 was 56.8M

(Source: Editor & Publisher International Annual Data Books – Dailies and Weeklies – 2015 and 2005; counts and combined circulation comparisons based on January 1 data for both years)

Newspaper publishers are changing their business models to curtail costs, expand access to content via digital platforms:

- Reduction of home delivery schedules to 3 or 4 days a week, including Sunday
- Some publications adopting these schedules continue to offer print editions at newsstands and other points
- Others offer digital-only options on non-delivery days

Recognized channels for audited newspaper circulation data by the Alliance for Audited

Media (AAM), formerly known as the Audit Bureau of Circulations (ABC), are:

- Print distribution (individually paid, business/traveler distribution such as hotels and airlines, and consumer copies that are non-paid or paid by someone other than the individual)
- Digital Replica: Digital format containing all editorial and ROP ad content; may contain additional editorial and advertising. Circulation numbers not synonymous with daily Website visitors, page views, or other common web traffic terms
- Digital Non-Replica: Digital format with same name of paper's AAM membership; may contain different editorial or advertising from the print version. Circulation numbers not synonymous with daily Website visitors, page views, or other common web traffic terms.
- Affiliated Publications: Print and/or digital editions reflecting a different name than AAM member; may contain audience-focused, alternative language or community papers.

Readership

Fewer than 2/3 of U.S. adults read a print version of the newspaper

- 60.8% of all U.S. Adults 18+ read a print newspaper during the past week

(Source: The Newspaper Association of America (NAA), 2013)

- Print readership varies by age demographic, with older adults more likely to consume print than younger Americans.

	Daily	Sunday
Adults 18-24	6.3%	6.8%
Adults 25-34	9.2%	10.9%
Adults 35-45	10.9%	12.4%
Adults 45-54	17.8%	18.8%
Adults 55-64	21.1%	21.1%
Adults 65+	34.7%	29.9%

(Source: GfK MRI Doublebase 2015)

- When newspaper Websites/e-Editions are added to print, Adults 18+ readership in the past week increases to 69.1%
- Readership for the combined platforms increases significantly to 61.2% for Adults 18-34 and is up to 72.4% for Adults 35+. Results for the 55+ demo are 76.1%.
- 41.9% of Men 18+ and 44.1% of Women 18+ read a print or e-Edition of the Sunday newspaper, while the 5 weekday combined Print/e-Edition came of papers for these demos is 53.8% of Males and 51.5% of Females.

(Source: The Newspaper Association of America (NAA), 2013)

- Newspaper correlates with higher income levels, reaching
 - 45% of adults with households incomes of \$150K+
 - 41% of those with HHI of \$100K-\$149,999
 - and 40% of those in the \$75K-\$99,999 bracket.
- Additionally, newspaper reaches
 - 40% of college graduates
 - Approximately 50% of adults with some post-graduate work or post-graduate degrees.

(Source: Pew Research Center-State of the News Media 2013/Scarborough 2012 Report, Wave 1)

- Many print newspaper advertisers like to “target” consumers by placing their ads in special sections of the paper. However, among those adults who read print newspapers, only a small percentage of actually read every section – many readers will never be exposed to advertising.
 - Weekday papers
 - Front page, 30%
 - Local News, 29%
 - International/National News, 16%
 - Business/Finance, 9%

- Comics, 13%
- Editorial Page, 12%
- Entertainment/Lifestyle, 12%
- Fashion, 5%; Food/Cooking, 12%
- Health, 11%
- Home/Home Design/Furnishings/Gardening, 7%
- Movie Listings & Reviews, 8%
- Science & Technology, 6%
- Sports, 16%; Travel, 6%
- TV Listings, 7%
- Weather, 17%
- Advertisements, 9%
- Circulars/Inserts/Fliers, 12%
- Classified Advertising, 10%.
- Sunday/Weekend papers
 - Front page, 29%
 - International/National News, 16%
 - Local News, 25%
 - Business/Finance, 9%
 - Comics, 14%
 - Editorial page, 10%
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- Advertisements, 11%
- Circulars/Inserts/Fliers, 17%
- Classified Advertising, 10%

(Source: GfK MRI Doublebase 2015)

- On the positive side for print newspaper advertisers, consumers are mainly receptive to ads in this medium.
 - 52% of Adults use print newspapers (including ads in regular news, classified pages, and inserted circulars) on a weekly basis to assist with shopping planning and purchase decisions
 - 79% of respondents indicated they had taken some action in response to a print newspaper ad during the prior month, with most common actions being:
 - Becoming aware of a sale (61%)
 - Clipping a coupon (51%)
 - Buying something advertised (48%)
 - Visiting a retail store or showroom (40%)
 - Discussing or mentioning the product advertised with a friend/family member (40%)
 - Bought something at an Internet site they saw advertised in the paper (14%)
 - Even non-readers will check into the paper for advertising message
 - 15% of non-readers of newspapers (those who said they hadn't "read or looked into" a newspaper during the prior week reported having used a paper to check sales in local stores
 - 13% had clipped a coupon
 - 6% had checked out a classified ad

(Source: Frank N. Magid Associates for NAA/Newspaper Association of America - May 2014)

- Only 35% of all adults indicated they ignore newspaper ads the most (vs. 82% of online ads)

(Source: Marketing Charts/Goov Technologies/Harris Interactive - February 2014)

- Consumers are migrating to newspapers' digital platforms, according to reports from comScore:
 - Newspaper digital access reached 78% of online adults in March 2014
 - Net reach of newspaper digital content:
 - 18-24 = 71%
 - 25-34 = 84%
 - 35-44 and 45-54 = 79%
 - 55+ = 77%
 - Audience engaging with digital content reached all-time high of 161M adult unique visitors in March 2014, up from 135M in April 2013
 - Use of desktop or laptop to as sole device for newspaper digital content declined in 2014 for all age groups except 55+
 - Use of mobile (Smartphone/tablet) access in some form increased across all age groups
 - Newspaper subscribers who use mobile news apps more likely than non-subscribers to use those branded by newspapers (*RJlonline, 2014*)
 - Newspaper subscribers of all ages most likely to pay for subscription to mobile news content
 - 11% of newspaper subscribers overall said they pay for mobile content
 - 5% on non-subscribers to newspaper pay for content
- Newspapers' digital pay walls have gained traction,
 - Approximately one-third of U.S. dailies have adapted digital pay walls
 - Success of this revenue stream will hinge on consumers' willingness to pay for access to content.
 - Future for digital newspaper advertising lies in targeted display, or ads responsive to interests readers have demonstrated in their Internet access to content

(Source: *RJonline, 2014*)

- Newspaper advertising revenue is declining, but not as fast as circulation and readership.
 - Newspaper ad revenue hit its all-time high in 2000, at \$48.67B.
 - Total 2013 spending was \$23.57B (-2.6% from 2012), comprising
 - Print @ \$17.3B (-8.5% from 2012)
 - Retail and national ad spend both down 8%
 - Classified fell 10.5%
 - Digital @ \$3.42B from digital (+1.5%)
 - Approximately ¼ (24%) derives from “pure-play” digital appearing only on digital platforms, not in print products
 - Niche/Non-Daily Publications @ \$1.45B from niche/non-daily (-5.8%)
 - Direct Marketing @ \$1.40B from direct marketing (+2.4%)
 - Circulation revenue in 2013 was \$10.87B, up 3.7% over 2012
 - Within that total, digital-only circulation revenue grew 47%
 - Print and digital bundled circulation increased 108%
 - Print-only circulation revenue from home delivery and single-copy sales declined 20%.

(Source: *NAA/Newspaper Association of America, 2013 total year revenue*)

- Newspaper advertising expenditures represented approximately 10% of total media spending in 2014 (vs. 1.8% share of media time) (*Magna Global, 2015*)
- U.S. advertisers invest approximately \$0.82 per U.S. adult: hour spent with the medium
 - Disproportionately high volume compared to major electronic media such as TV (\$0.17), radio (\$0.13), online(\$0.12), mobile(\$0.07)
 - Ad spend may remain higher due to habit, not yet caught up to decline in consumption

(Source: *Marketing Charts 2015*)

For additional information/insights on Newspapers:

Newspaper Association of America (NAA):

<http://www.naa.org/>

National Newspaper Association (NNA):

<http://naweb.org/resources>

<http://naweb.org/about-nna?articleCategoryId=community-facts-figures>

Alliance for Audited Media (AAM)

<http://www.auditedmedia.com/>

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Advantages

Reach: Mass reach, delivered daily: Newspapers reach a relatively large mass audience throughout the market in a single issue. One advertisement in the newspaper typically can create more impressions than a single commercial spot on television or radio, a single outdoor billboard, or online platform. Beyond initial circulation, newspapers can deliver meaningful pass-along audiences and their reach over a week or month is significantly higher than their daily tallies indicate.

Targeting: Geographic targeting is available through combinations of major market and small town/suburban papers, as well as by zoned editions that allow for less than full run of press coverage.

Newspapers boast strong upscale demographics, delivering a high proportion of educated, affluent consumers.

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Editorial selectivity is available using specific sections of the paper to advertise to a target audience – e.g., women's specialty store in fashion section.

Environment: The majority of newspapers retain reputations for high civic-mindedness and integrity in reporting.

Cross-Platform Exposure: A mix of print and digital platforms offered by newspapers affords access to differing demographic segments. Newspaper websites are a growing option for advertisers to reach younger, more upscale audiences. The availability of video ads on digital platforms increases appeal.

Tracking: It is relatively easy to track response to newspaper ads, primarily through couponing.

Ad Timing: Advertisers can place orders and submit copy/artwork with a short lead time.

Content: The combination of text and graphics in the newspaper, when used effectively, can create visual appeal to reinforce the advertising message.

Newspaper ads afford the capability to communicate lengthy, complex or detailed information and descriptions, as well as disclaimers legally required for certain forms of advertising.

Comparison Shopping: The newspaper is an effective vehicle for consumers to price shop and also serves as a primary source for coupons. Newspaper readers and non-readers often seek out ads to learn about store promotions, prices, and to clip coupons for savings.

Ad Size: The medium offers a wide range of ad sizes that allow advertisers to meet their budgetary parameters, ranging from a single column-inch ad to two adjacent full-pages (double-truck display).

Classified Advertising: Many consumers consult their newspaper to look for job offerings, real estate and automotive ads, other buying/selling opportunities.

Opportunities: If newspaper publishers can capitalize on them, online companion Websites and mobile apps can provide newspapers with a vehicle for more immediacy, audio and visual delivery of ad messages.

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Disadvantages

Reach: Large percentages of adults don't read any newspaper each day, especially among younger demographics. Even among readers, people rarely go through all the sections of the newspaper.

Quality: Despite printing improvement over the years, newspaper ad reproduction isn't a match for magazines or online displays.

Clutter: Same-page ad clutter is an issue for all but the largest advertisers (those purchasing ½-page of full-page displays). Ads placed next to a competitor's may only be an advantage if price is absolutely the lowest.

Passivity: Print newspapers provide only visual information. Newspaper ads are non-intrusive, appeal primarily to consumers who are seeking them out.

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Timeliness: Newspaper coverage of news events lags behind TV, Cable, radio, Internet. Readers may seek out more in-depth reporting from the paper, but get breaking news from electronic and digital sources today. Social networks such as Twitter, BuzzFeed also afford quick access to stories.

Declining Distribution: Newspaper circulations, especially on weekdays, are in steep decline.

Demographics: Newspapers' audience skew is 35+, with emphasis on 55+.

Coverage: The metro market reach of the typical major market daily newspaper is only about half of what it was 25-30 years ago.

Digital Ads: Newspaper websites to date have not been able to exploit the availability of video commercials on the digital platforms. There is controversy regarding how consumers "view" digital ads on all platforms that must be resolved.

Measurement: Circulation, not readership, was newspapers' sales currency for many years. As the medium attempts to shift to readership data, audience surveys currently available rarely provide issue-specific data or readership estimates by page or section of the paper.

Media Buying Limitations: GPP or media weight factoring is a challenge due to wide variations in market-to-market coverage and circulation. In many cities there is only one major newspaper available.


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Plus Radio

Reach: Radio offers broad reach across all demographics, including younger consumers not easily delivered by newspaper advertising. Radio reaches approximately 243.8 million listeners or 92% of U.S. persons 12+ per week (*Nielsen Audio, RADAR 122, September 2014*). Adding a relatively inexpensive radio schedule to a newspaper ad campaign can boost the number of different persons who will be exposed to an advertising message.

Enhancement: The ear is a powerful organ for messaging, and radio can provide sound that is lacking from print advertisements. Conversely, newspaper ads can provide deeper messaging and details that short radio spots can't convey.

Recall: Radio combines with newspaper to improve brand recall. A study by the Radio Ad Lab proved that an ad schedule combining radio and newspaper improved total brand recall compared to newspaper advertising alone. On an ROI basis, radio is more than a supplement: A

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combined newspaper/radio buy is demonstrably more powerful than on using newspaper alone.
http://www.rab.com/whyradio/ad_Lab6.cfm

Environment: Radio cuts through the clutter, featuring commercials one at a time, whereas newspapers commonly display multiple ads on the same page, diminishing branding opportunities. Use radio to direct consumers to a particular ad in an edition of the paper for locations, details beyond radio messaging.

Readers can easily skip past newspaper advertisements, but linear radio is intrusive and breaks through with your message. Arbitron/Media Monitors/Coleman Research's 2011 "What Happens When the Spots Come On" found that radio retains 93% of its lead-in audience during commercial breaks.

Frequency: Radio advertising is affordable and allows you to add impact to your brand messaging through repetition.

You can air multiple radio spots in a single day versus one newspaper ad. That means bigger and faster results because repetition sells. Radio can help maintain loyal customers by keeping your name or brand image top-of-mind. When the consumer knows your name, she's more likely to stop and read you newspaper advertisement.

Targetability: Radio is highly-targetable. While everyone in the market reads the same print newspaper, there are many radio formats, each attracting a distinct demographic or lifestyle group that allows you to zero in on a specific audience – and making a radio buy more efficient than newspaper.

Cost: Newspaper advertising can be expensive, depending on the size of the ad and where it is placed in the publication, and one ad hits all who read the paper. Good radio advertising is relatively inexpensive to produce and can be tailored to different demographic groups and placed within niche program formats.

Speed: The time to create a radio spot, produce it and get it on the air is shorter than the time required to publish an ad in the print edition of the paper. Radio can be the advance team for messaging that needs to get out quickly.

Recall: A Radio Ad Lab study on radio/TV synergy confirmed that adding radio to a TV ad schedule can boost brand recall. Swapping out one of two television ads for two radio ads increased unaided brand recall by 34%. Consumers who heard two radio ads and only one TV ad could restate a campaign's main message equally as well as those exposed to two TV ads.

For more information on radio:

Glossary: <http://www.rab.com/public/reports/buyselfterms.pdf>

FAQs: <http://www.rab.com/whyradio/faq.cfm>

Statistics and Trends: <http://www.rab.com/whyradio/>

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