



# Paying For News: Why People Subscribe And What It Says About The Future Of Journalism

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# INTRODUCTION

The future of journalism will increasingly depend on consumers paying for the news directly, as content distributors like Facebook and Google take up the lion’s share of digital advertising dollars.

The Media Insight Project, a collaboration of the American Press Institute and The Associated Press-NORC Center for Public Affairs Research, has undertaken what we believe is one of the largest efforts ever to understand who subscribes to news, what motivates them, and how creators of journalism can engage more deeply with consumers so more people will subscribe.

This, the first report in that series, is based on in-depth formative interviews with news consumers in three cities and a nationally representative survey, informed by those interviews, of 2,199 American adults conducted between February 16 and March 20, 2017.

The study finds that slightly more than half of all U.S. adults subscribe to news in some form—and roughly half of those to a newspaper.

And contrary to the idea that young people will not pay for news because information on the internet is free, nearly 4 in 10 adults under age 35 are paying for news.

## Who pays for news, and why do people subscribe?

53% OF ADULTS PAY FOR NEWS (NOT INCLUDING CABLE TV BUNDLES)
54% OF PAYERS SUBSCRIBE TO NEWSPAPERS
52% OF THOSE WHO DO NOT SUBSCRIBE ARE “NEWS SEEKERS”
26% WHO USE A SOURCE FOR FREE MIGHT BEGIN TO PAY FOR IT
COVERAGE OF A SPECIFIC TOPIC IS THE #1 REASON WHY PEOPLE START SUBSCRIBING
53% OF DIGITAL SUBSCRIBERS HAVE NEVER PAID FOR A PRINT VERSION OF THAT OUTLET

People are drawn to subscribe to news for three reasons above others—because a publication excels at coverage of key topics, because friends and family subscribe to the publication, and to a lesser degree, in response to discount promotions on subscription prices.

There is also substantial evidence that more consumers could begin to pay for news in the future—if publishers can understand them and serve them well. Half of those who do not pay for news actively seek out news and resemble subscribers in various ways. And nearly 2 in 10 of those who don’t subscribe to news now indicate they are inclined to begin to pay in the future.

Most subscribers see themselves as primarily print-oriented or digitally oriented—only 4 percent describe themselves as a combination of print and digital.

Taken together, the findings carry a number of implications about how publishers should proceed—including that they must pursue a dual strategy of both print and digital for the foreseeable future, and that, even as newsrooms contract, they must improve coverage in key areas of specialization.

This study is designed to answer some fundamental questions facing the news industry. Among them: Who pays for news? Why do they pay? Who does not pay for news and why not? What are the paths publishers can take to more deeply engage readers and to persuade news consumers to pay for journalism directly? What price points matter? The answers may shape what journalism looks like in the future.

To get answers, the survey asks several general questions about how and why people use the news in the first place. We then ask a set of questions to determine whether people pay for certain types of news sources. We asked people to name the sources they use most often—whether they pay for them or not—how they use them, the specific things they consider important about them, and some related questions about the cost and value of that source.

Among the key findings:

**How many people pay for news?** In all, 53 percent of Americans pay for news, including subscribing to newspapers or magazines, paying for news apps, or donating to public media. This number does not include those who pay for cable TV bundles that could include news channels.

**Do young people pay for news?** Fully 37 percent of the youngest adults, 18 to 34 years old, subscribe to news. The two youngest age cohorts who pay (18-34 and 35-49) also behave differently than older subscribers. They are motivated more by a desire to support the news organization's mission. About two-thirds of them who use Facebook use it several times a day (compared with half of older subscribers), and many say that discovering a news source through social media was a key factor in deciding to pay for it.

**What value do people see in news?** People are drawn to news in general for two reasons above others: A desire to be informed citizens (newspaper subscribers in particular are highly motivated by this) and because the publication they subscribe to excels at covering certain topics about which those subscribers particularly care.

**Why do people choose to subscribe?** While there are a host of reasons, the No. 1 cited (by more than 4 in 10 subscribers) was that the publication they pay for excels at covering certain topics about which they particularly care. More than 4 in 10 also cite the fact that friends and family subscribe to the same product. More than a third of people say they originally subscribed in response to a discount or promotion. In print, people also are moved heavily to subscribe to get coupons that save them money, something that has untapped implications in digital.

**Who does not pay for their news?** Of those who do *not pay for news at all*, many resemble subscribers in a variety of ways. About half are “news seekers,” meaning they actively seek out news rather than primarily bumping into it in a more passive way, though the news that nonpayers are seeking (for now, at least) is often about national politics. Like subscribers, many of these people also get news multiple times a day, use the news in ways similar to subscribers, and are interested in similar topics, including foreign or international news. Nonpayers, though, generally see news as a little less valuable in their lives and think that there is plenty of free content available.

**What are the opportunities for growth?** We asked everyone who told us they have a regular free source of news how likely they would be to pay for it. More than a quarter (26 percent) say they would be at least somewhat likely to begin paying for it—and 10 percent are very or extremely likely. These likely payers tend to be news seekers, and they also tend to be people who already pay for a news subscription in addition to the source they follow for free. Nonpayers are also price sensitive: most are willing to pay no more than \$1 a week.

**Who pays for newspapers, in particular?** Of those who do pay, 54 percent subscribe to newspapers in print or digitally, which represents 29 percent of Americans overall. Most of them buy a print magazine along with their newspaper and pay for two to four news sources in total, some even more. And while 53 percent are long-time subscribers (5+ years), more than a quarter (27 percent) have purchased their newspaper subscription within the past year. Newspaper subscribers especially value information about specific topics of interest and are more likely than others to value news that helps them be a better citizen and gives them something to discuss with friends and family. In other words, for newspaper subscribers, news is a form of social flow, and strong social engagement through platforms like Facebook, Twitter, and Instagram—both listening to readers and responding to them—is important.

**Do people pay for print, digital, or both?** Subscribers divide largely into two camps—58 percent who view themselves as primarily print consumers and 28 percent who view themselves as primarily digital. Only 4 percent see themselves as blended between both mediums, though a sizable minority of print-oriented subscribers also engage digitally, including on social media. Few print subscribers think it likely they will switch to a digital-only subscription in the future, and more than half of those who prefer digital have never paid for a print version of the same source.

**Newspaper subscribers in particular describe themselves as print-oriented.** Fully 75 percent of newspaper payers say they primarily read the paper in print, while 21 percent are mostly digital users, and 4 percent describe themselves as evenly split. Newspaper subscribers who prefer print tend to be older and long-time readers, while those who prefer digital tend to be younger with less experience with an outlet. However, even the print-minded newspaper subscribers exhibit a fair amount of digital usage. As an example, in substantial numbers print subscribers also share content and visit their source's website; smaller but still sizable numbers even follow it on social media, use its app, receive text alerts, and subscribe to email newsletters. Meanwhile, digital payers engage with sources in many of these ways more often than print payers. In short, even though print dominates among newspaper subscribers, the future of newspapers depends on winning over more young digital readers, while maintaining ties to the existing print readers. A single strategy, or a failure to develop a dual strategy, is likely ill fated.



## IMPLICATIONS FOR PUBLISHERS

These key overall findings have a number of implications for publishers and the future of journalism.

- **Specialization and expertise.** Even as newsrooms contract, they should focus on identifying and investing in centers of coverage excellence—including around civic issues—or they may provide no compelling reason for people to subscribe. News payers are highly motivated by being a fully informed citizen (particularly among higher-income people) and by getting expert coverage of a particular subject that matters to them (particularly among higher-educated people).
- **Focus on the “news seekers.”** Publishers must find ways to identify and then engage news seekers who look like subscribers but currently do not pay. Seventy-two percent of these people get news on social media, and about 1 in 3 say they would be at least a little likely to pay for the source they now use for free. In general, these nonpaying news seekers tend to follow news much like subscribers do, and just as often. It is critical to identify them, try to understand them, and then reach out to them at the right moment.
- **Leverage the power of coupons in digital.** While it has not fully developed online and in mobile, publishers should more robustly pursue a strategy of moving coupons into digital, and particularly mobile formats, as part of their subscription strategies. Print subscribers often cite coupons as one of the benefits they value, but digital audiences are not as well-served.
- **How to reach young subscribers.** Younger generations *will* pay for news—but publishers must understand that these relationships begin through friends’ referrals and social media and are strengthened through frequent engagement and interaction. For younger audiences to be willing to pay, they must bond with your mission and purpose.
- **When a reader’s lifestyle changes, take advantage.** Publishers can target people at certain life stages—moments when they are ripe to become subscribers. Among those 18-34 years old, many say they began paying for a source because they recently became able to afford it—perhaps upon getting a new job or promotion. Among payers age 65 and older, many say they started paying because they suddenly had more time to spend with news—perhaps upon retirement. Smart publishers can target their marketing outreach to people hitting these life stages.
- **Much news is underpriced.** People who currently pay for a subscription tend to think it is relatively inexpensive. Most think the price they pay is a very good or fair value. Only 1 in 10 people think their subscription costs too much for what they get. Digital subscribers in particular are more likely than print subscribers to feel they are getting a very good value (48 percent vs. 32 percent), suggesting they might be more willing to pay more than they are now.
- **News payers demand quality over cheapness.** Those who pay for news are attracted to their paid source because it helps them stay informed and covers issues they care about well. Their sources provide news and information they care about in an easily-accessible way, and they rate them as highly reliable. And they value the exclusive content they get, more so than other auxiliary benefits like giveaways from the organization. Subscribers are clearly signaling that publishers cannot cost-cut their way to growth – attracting subscribers requires investment in premium news content and focusing on audience needs.

## SECTION II

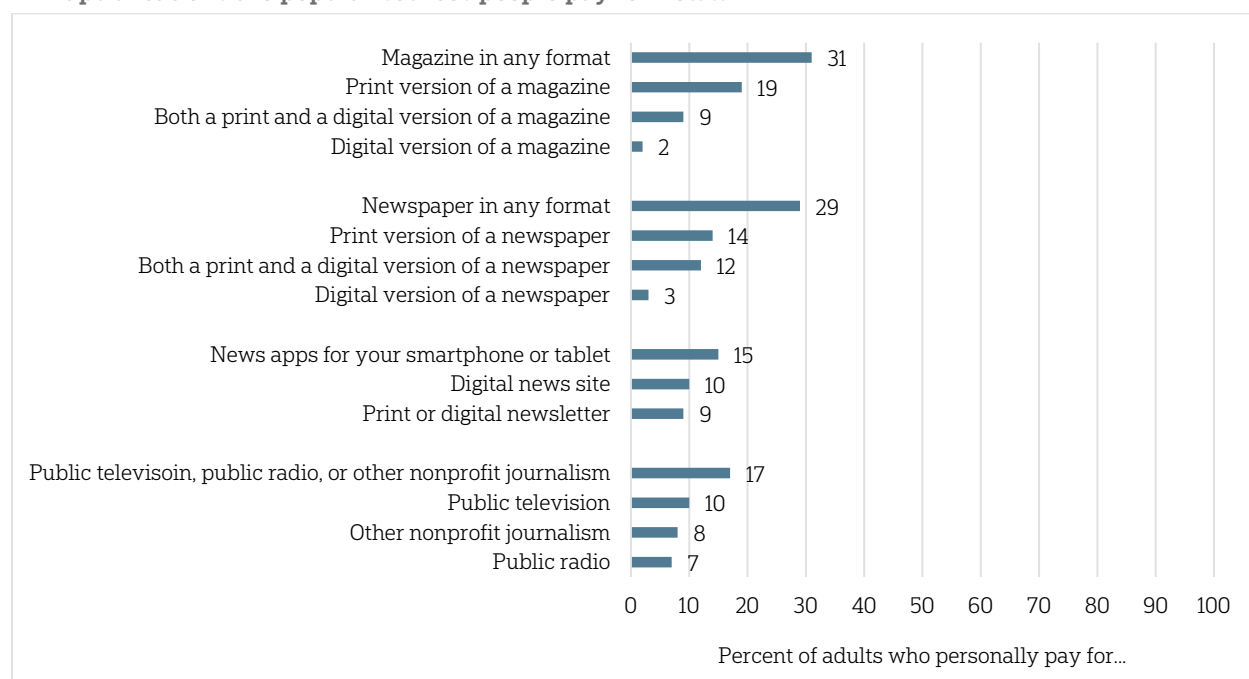
### WHO PAYS FOR NEWS IN GENERAL AND WHY

Despite an increasing number of free news options available, a majority of adults pay for a news source of some sort. Again, 53 percent of adults report they either pay for a newspaper, magazine, news app, or news site, or donate money to public radio, public television, or a nonprofit news organization. And 65 percent of people subscribe to cable or satellite TV through packages that often, though not always, include cable news.<sup>1</sup>

And of those who pay, as noted above, more than half (54 percent) subscribe to newspapers in print or digital form, which represents 29 percent of adults overall.

Americans pay for news in a wide variety of formats. Yet for all age groups, even the Millennial generation, print subscriptions remain generally more popular than digital ones.

#### Print publications are popular sources people pay for news.



Question: Next, we are interested in whether you paid to use any media in the last year. For each of the following types of media, please indicate whether you personally have a subscription or pay for it on a regular basis, or not.

As an example, 29 percent of adults say they personally pay for a newspaper subscription. In particular, 14 percent pay only for a print subscription, 12 percent have a digital and a print subscription, and 3 percent get only a digital subscription.

<sup>1</sup> This estimate of the number of Americans who pay for a specific news source does not include those who pay for either satellite radio or cable/satellite television because these subscriptions include both entertainment and news programming. Sixty-five percent of adults pay for cable or satellite television, 48 percent rent or download movies and television shows, 27 percent download or stream music, 19 percent pay for video games, and 16 percent pay for satellite radio.

In addition, 31 percent of adults subscribe or regularly pay for a magazine. Nineteen percent pay only for a print magazine, 9 percent pay for a print and a digital magazine, and 2 percent pay only for a digital magazine.

How are digitally native news sources (those not connected to legacy media brands) doing at getting people to pay? They look a good deal like legacy media on that score. Adults are about as likely to pay for digitally native sources, such as Slate Plus, as they are to pay for digital versions of a newspaper or magazine. In all, 15 percent of adults pay for a digital news app, and 10 percent pay for access to digitally native news sites.

And finally, there is another category of paying for news—nonprofit media such as PBS and NPR stations and a growing host of new digital nonprofit news sites, including places like the Pulitzer Prize-winning ProPublica, the Center for Investigative Reporting, or local outlets such as Voice of San Diego. Nearly 1 in 5 Americans donate money to at least one nonprofit media source such as public radio or television, including 6 percent who donate to more than one type of nonprofit news outlet. Seven percent of Americans give money to public radio, 10 percent to public television, and 8 percent to other nonprofit journalism organizations (such as ProPublica, local nonprofit media, the Center for Public Integrity, and many others).

## THE DEMOGRAPHICS OF WHO PAYS FOR NEWS

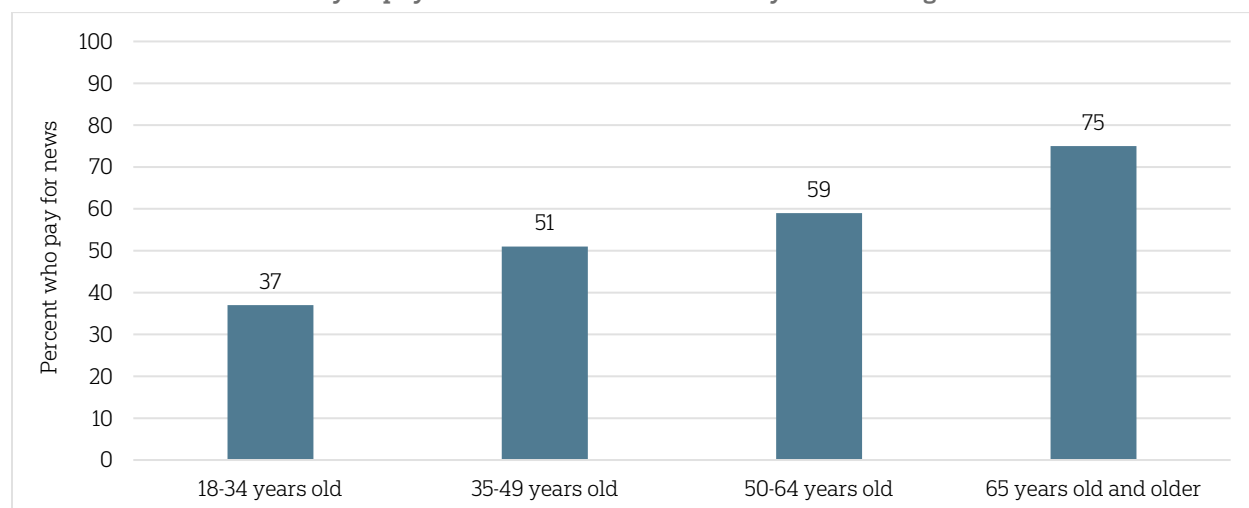
Who are the people who pay for news? Older Americans, and those with higher education, are *most likely* to do so. But it would be a mistake to think those are the only key determining factors.

Indeed, many adults of all ages, races, education levels, and political affiliations pay for a news source. In all, as noted above, close to 4 in 10 of the youngest adults age 18 to 34 in America (37 percent) say they pay for news sources of some kind. Of those, 46 percent pay for a newspaper subscription.

That compares to 75 percent of adults age 65 and older who pay for at least one subscription of some kind (70 percent of whom pay for a newspaper).

Still, the data run contrary to the notion that only older Americans will subscribe to newspapers.

**Older adults are more likely to pay for news but not as markedly as some might think.**



Question: Next, we are interested in whether you paid to use any media in the last year. For each of the following types of media, please indicate whether you personally have a subscription or pay for it on a regular basis, or not.



If age is one factor of who pays, education is another indicator. But as with age, it would be a mistake to consider it decisive.

In all, 66 percent of adults with a college degree pay for news, but so do 43 percent of people with a high school diploma or less. Looking at income, people from *all* socioeconomic groups pay for news. (Below we highlight how income and education are related to differences in why people say they pay for news.)

There are no significant differences in paying for news related to race and ethnicity when controlling for other demographic factors. In total, 41 percent of Hispanics, 49 percent of African Americans, and 56 percent of whites pay for news.

## WHY DO PEOPLE PAY FOR NEWS?

If there is broad diversity in who pays for news across race, age, and even income, what are the reasons or factors that influence whether a person is willing to pay for the news they get?

That may be one of the most important questions facing journalism as it moves toward a more consumer-driven revenue model.

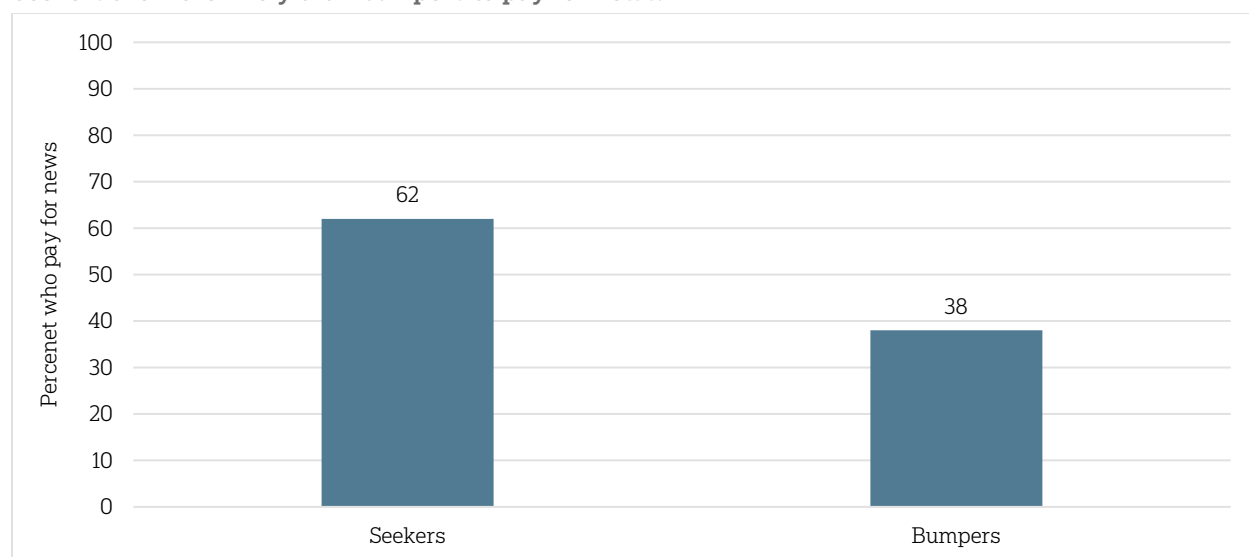
In an earlier study of Millennials, we at the Media Insight Project identified one defining characteristic of news consumption, particularly in the digital age when so much news is consumed in social platforms.

Some people are “news bumpers,” meaning they primarily get their news by bumping into it without seeking it out or turning intentionally to particular sources. Other people are “news seekers,” meaning they look for topics and issues they are interested in and actively and intentionally hunt for them. In subsequent studies of all age groups, we have seen the same pattern. There are seekers and bumpers across all demographic groups. Older people are more likely to be seekers, though there are plenty of younger people who also seek out news rather than simply bump into it.

Three-quarters of those who pay for news fall into the category of being news seekers. That suggests seekers are the largest and most likely group for publishers to try to understand.

The data still reveals, however, that a quarter of subscribers to news say they tend to primarily bump into the news they consume. Given the high use of social media by all groups—subscribers, nonsubscribers, seekers, and bumpers—this suggests that a sophisticated and robust social strategy is important for any publication that wants to generate more subscription revenue.

Among all self-described seekers, 62 percent are news subscribers. And nearly 4 in 10 self-described bumpers pay for news.

**Seekers are more likely than bumpers to pay for news.**

Questions: Next, we are interested in whether you paid to use any media in the last year. For each of the following types of media, please indicate whether you personally have a subscription or pay for it on a regular basis, or not. Choose the statement that best describes you, even if it is not exactly right. In general...I actively seek out news and information or I mostly bump into news and information as I do other things or hear about it from others.

Some may think another indicator of who pays for news is how frequently people seek it out. And indeed, people who pay for news are more likely to consume it more frequently. In all, nearly 8 in 10 of those who pay for news—77 percent—say they get it several times a day or more. But most nonpayers also are frequent news consumers. Among nonpayers, 56 percent get news multiple times a day.

These similarities mean we also need to look deeper, beyond these behavioral tendencies, at the reasons people pay for news. Are those who pay for news looking for information about a few specific topics? Are they sensitive to price and respond to discounts and promotions in subscriptions? Do they do it just to be informed citizens? Are they trying to get information that will help them save money or figure out how to spend their time?

The researchers probed deeply into these factors, both in the survey and in a series of in-depth interviews we conducted in three cities to help inform and construct the survey in the first place.

In the survey, we asked people to identify a particular news outlet or source that they pay for, and then we asked them a series of questions about their reasons and motivations.

Ranking all the reasons people offered looks like this:

At the top, more than 4 in 10 say they were looking for a news source that covers a particular topic, which highlights the opportunity for news outlets that focus on a particular issue or a handful of identifiable franchise topics. Coverage expertise, in other words, is a major factor.

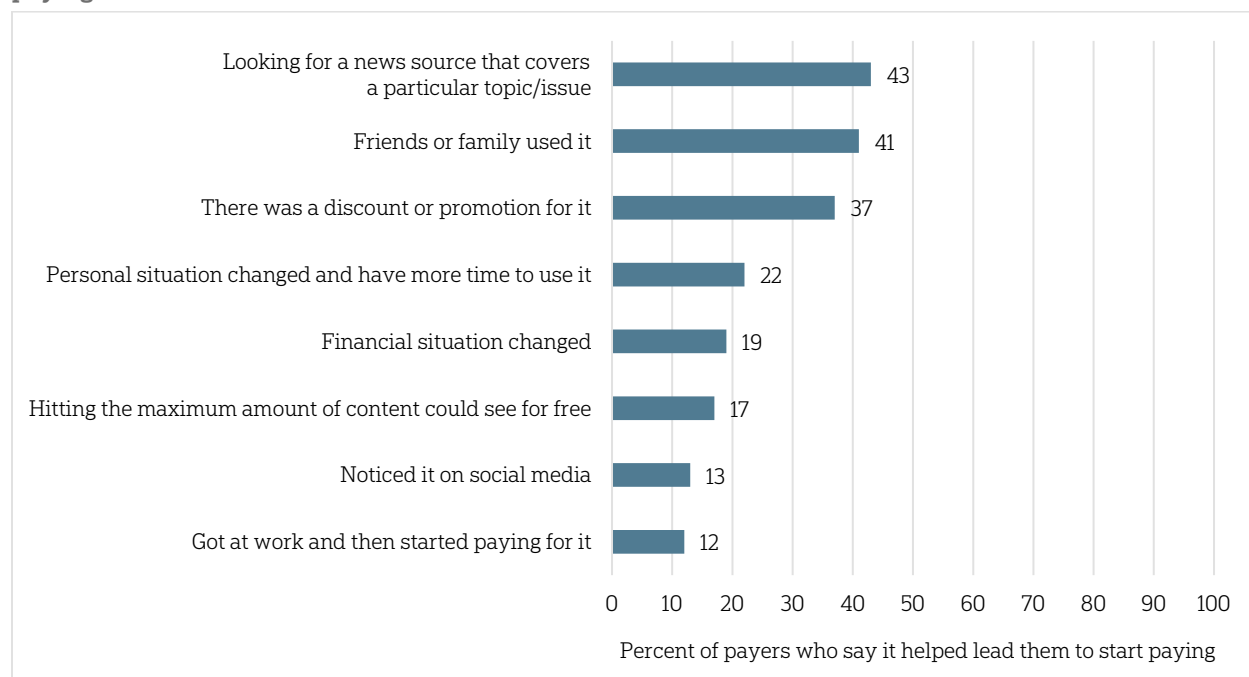
At No. 2, a similar number, about 4 in 10 report they started to pay for a news source because their friends or family used it. This finding of news having a social dynamic is something we also heard in formative interviews. Molly, who is about 30 years old and lives in Phoenix, said she and her husband have been accustomed to reading the local newspaper at her father's house and will probably now buy a copy when they get their own place.

At No. 3, promotions appear effective in boosting news subscriptions. Close to 4 in 10 report that a discount or promotion led them to start paying for a source. Several people in the formative interviews also mentioned the importance of deals.

Each of these three reasons—expert coverage of an issue, use by friends and family, and discounted subscription promotions—were cited by close to 4 in 10. Collectively, about 3 in 4 news subscribers cited at least one of these three motivations.

**John from Chicago says one of the reasons he finally decided to subscribe to *The New York Times* was because of a “super excellent offer” around the holidays.**

#### **News content, familiarity, and deals help lead people to start paying for news.**



Question: What factors helped lead you to start paying for [[PAID SOURCE]]?

After those top three factors come three others, cited by about half as many news subscribers.

About 2 in 10 started subscribing due to a lifestyle or financial change. Twenty-two percent started subscribing when their situation changed to permit more time to use a paid subscription, and 19 percent subscribed when their financial situation allowed it. These findings suggest that publishers have an opportunity to target potential subscribers at key life stages from getting a first job to retirement.

Some 17 percent of all payers say they subscribed because they kept hitting the maximum content they were allowed to see for free, a sign that so-called “pay meters” are a factor for at least some subscribers—but not necessarily a dominant one. The same number of newspaper or magazine payers say this. All of which suggests that pay meters are having some of the effect publishers hoped they would: motivating heavy users to pay for the service. But the data also suggest those meters work in combination with other considerations of “value,” including frequent engagement, quality content, and more.

Almost as many payers (13 percent) say the source's social media presence helped lead them to pay. (Later in this report we detail how social media presents new opportunities for news outlets to connect with news consumers.)

The survey also asked payers how important a list of various factors were in their decision to get their news from a specific source they subscribe to.

Interestingly, whether people pay for news or not, the reasons why they regularly get news from a source is virtually the same. Subscribers are simply more likely to list each factor as important. In other words, subscribers get news for the same reasons nonsubscribers do. They just tend to feel more intensely about it.

Among those who pay for news, three factors emerged as the most important reasons they turn toward their paid source. The first was that the publication they relied on was very good at covering an issue or topic they care a lot about (48 percent). Almost as many (47 percent) say their favorite news source helps them stay informed to be a better citizen, and 42 percent say they find the news source they turn to most is enjoyable or entertaining.

In probing people's motivations for getting news, we also went one step further and asked people to name what they like most about the news source to which they subscribe or use most frequently.

News content itself scored high in these open-ended questions.

We got a range of answers, but the most common was local coverage. One in 4 say the favorite aspect of the news source they pay for is the information about their community, hometown, local area, or region. We heard the same in the formatives. For example, Joe, age 52 from Chicago, said he usually seeks out local stories from the *Chicago Tribune* "because national news I can get somewhere else."

Nearly as many, about 1 in 5, say what they value most about the news source is the useful or interesting content.

A number of other factors were cited at about half this rate. For instance, 7 percent say what they like most about the news source they subscribe to is that it is accurate or unbiased, the same number (7 percent) appreciate lifestyle or entertainment information, 4 percent say that their news source is timely, 4 percent cite the breadth of issues covered, and the same number say it is convenient (4 percent).

Finally, we asked people who pay for news about the benefits they saw from paying. Again, there was a range of benefits rather than a single factor that jumped out.

The most popular benefit people cite is getting content only available to subscribers. More than a third, higher than any other factor, cite this (36 percent).

Almost as many say they like the coupons and discounts that subscriptions bring them (33 percent).

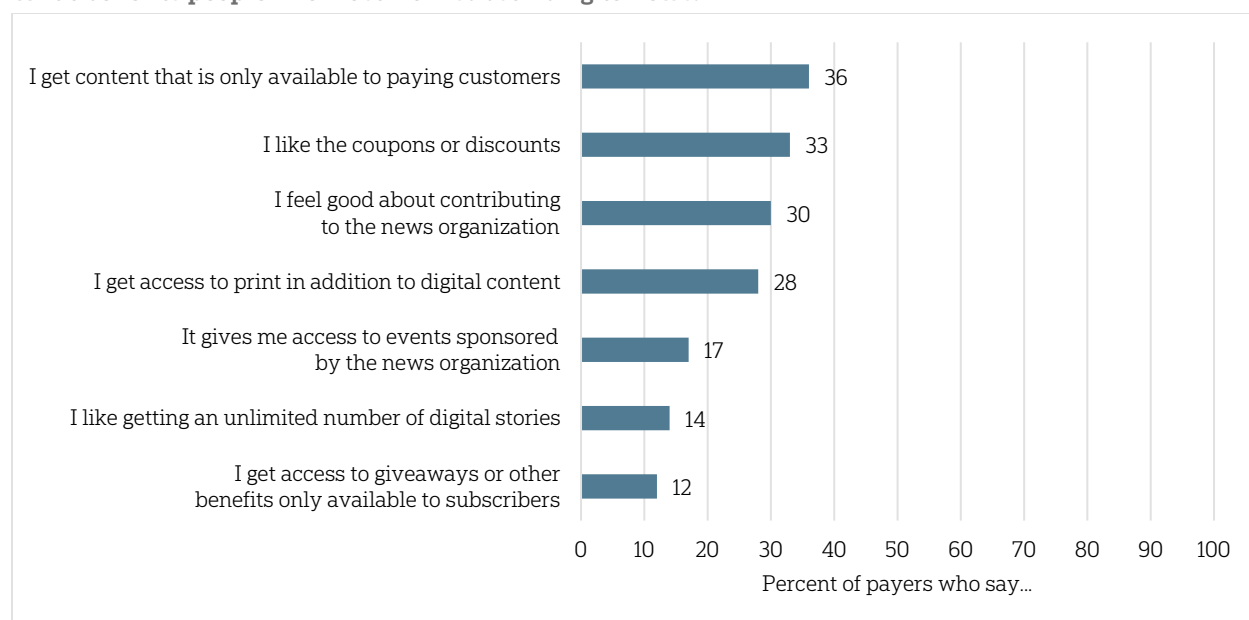
**John, who is in his 50s and lives in Chicago, mentioned a feeling social good when explaining all the factors that contributed to his decision to subscribe to *The New York Times*. "I really appreciate the work that *The New York Times* does, [and] I have confidence in their reporting," said John. "So I'm going to go out on a limb and spend money that may or may not benefit me that much, but it will be contributing to something that I want to be successful."**

And a similar number cite a sense of social good and that they feel positive about contributing to journalism.

A slightly smaller number but still more than a quarter (28 percent) say they like to get access to print in addition to digital content.

About half as many report they like getting unlimited numbers of digital stories (14 percent) or cite a second economic factor, having access to giveaways and free items (12 percent).

#### What benefits people like most from subscribing to news.



Question: What benefits do you get from paying for [PAID SOURCE]? Please select all that apply.

## SECTION III

### NEWSPAPER SUBSCRIBERS VS. OTHER TYPES OF SUBSCRIBERS

Within the universe of people who pay for news, the survey identifies those who subscribe to newspapers and those who do not.

In all, 54 percent of people who pay for news subscribe to a newspaper, and there are a number of differences between newspaper subscribers and subscribers of other news sources.<sup>2</sup>

Newspaper subscribers tend to place more importance than subscribers to other news sources on being informed; they also are more likely to value the benefits associated with print (if they are print-oriented) and digital (if they are digitally oriented).

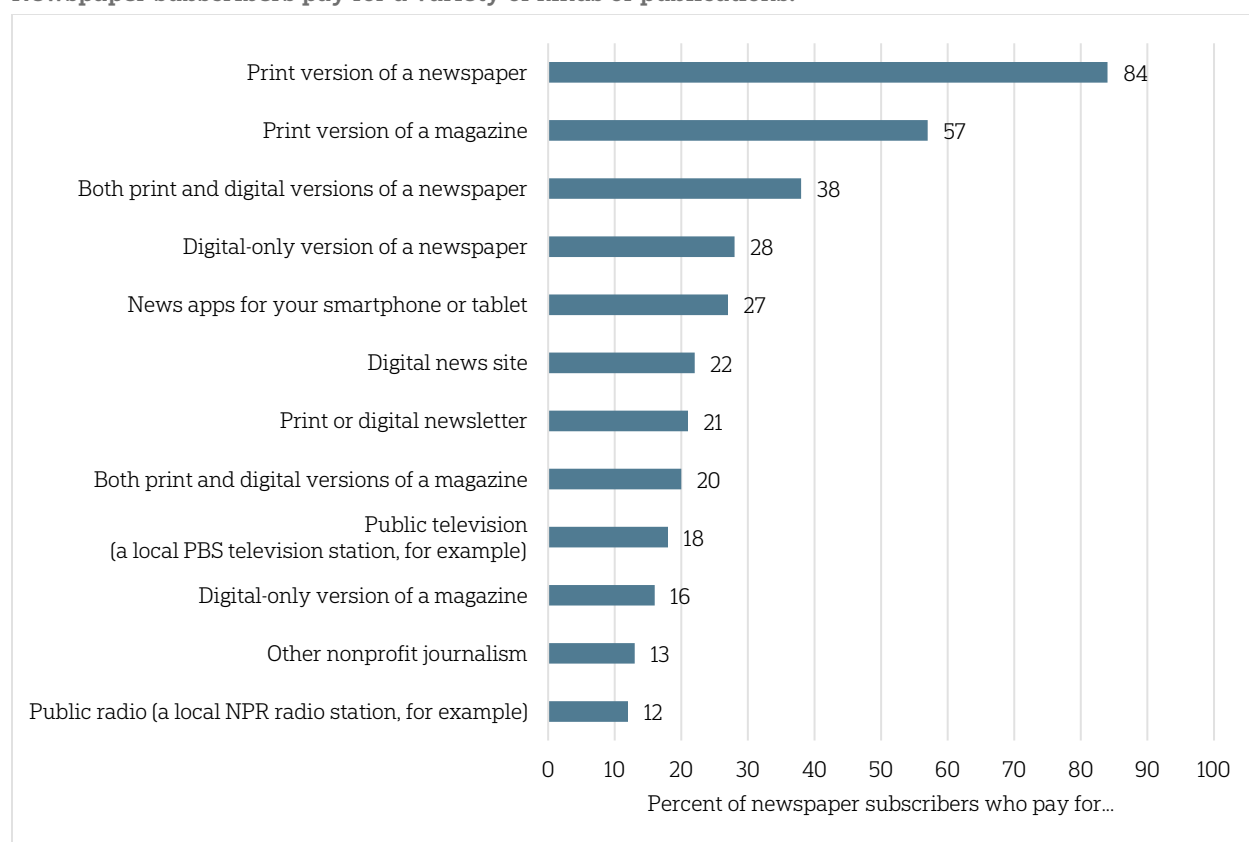
<sup>2</sup> Newspaper subscribers are defined here as those who personally pay for either a print version of a newspaper, a digital-only version of a newspaper, or both print and digital versions of a newspaper. Subscribers of other news sources do not pay for any type of newspaper subscription, but subscribe to a magazine, news site, news app, or newsletter, or donate to public television, public radio, or nonprofit journalism.

Newspaper subscribers also tend to subscribe to more publications than other kinds of news subscribers. Indeed, just 15 percent of newspaper subscribers say they pay for only one type of source. Fifty-five percent of newspaper subscribers pay for anywhere from two to four kinds of publications (i.e., print newspaper, digital newspaper, print magazine, etc.). And 30 percent of newspaper subscribers say they pay for five or more kinds of publications.

By comparison, subscribers to non-newspaper sources tend to pay for fewer types of sources. The majority, 58 percent, pay for just that one magazine or digital source. Another 4 in 10 (39 percent) pay for two to four source types. Just 3 percent pay for five or more types of publications.

Among newspaper subscribers, 84 percent are paying for a print newspaper, 38 percent are paying for a bundled print and digital newspaper subscription, and 28 percent are paying for digital-only versions of a newspaper (the numbers total to more than 100 percent because of multiple subscriptions). A majority of newspaper subscribers also pay for a print magazine, which is the other most popular publication type.

#### Newspaper subscribers pay for a variety of kinds of publications.



Questions: In the past year, please check whether you have donated money, someone else in your household has donated money, or you have not donated money to each of the following. Next, we are interested in whether you paid to use any media in the last year. For each of the following types of media, please indicate whether you personally have a subscription or pay for it on a regular basis, or not.

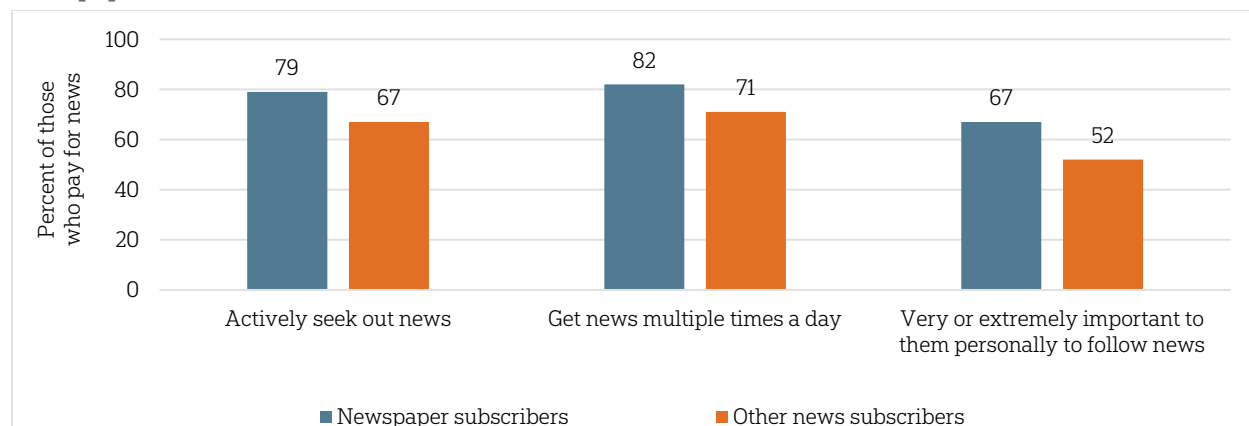
Among those who pay for news, the only major demographic difference between newspaper subscribers and subscribers of other news sources is age. Seventy percent of adults age 65 and older who pay for news subscribe to a newspaper compared with 46 percent of those 18-34 years old, 46 percent of those 35-49 years old, and 52 percent of those 50-64 years old.



Newspaper subscribers also tend to be more avid news consumers than subscribers of other news sources. In particular, newspaper subscribers are more likely to actively seek out news, get news multiple times a day, and say it is very important to them to personally follow news.

Interestingly, newspaper subscribers use social media at identical rates to subscribers of other kinds of news. Sixty-nine percent of newspaper subscribers get news on social media, about the same as subscribers to other sources.

#### Newspaper subscribers tend to be more avid news consumers than subscribers to other news sources.

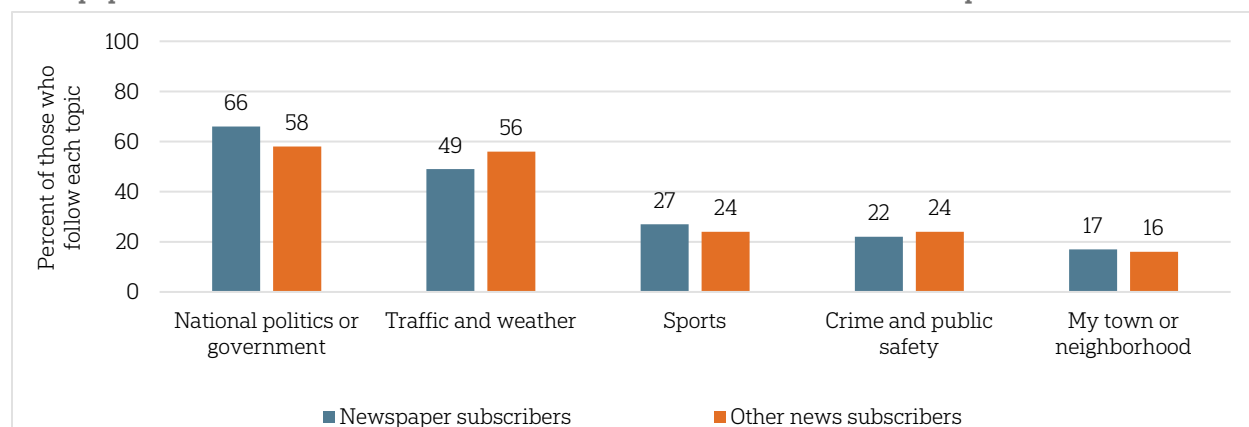


Questions: Choose the statement that best describes you, even if it is not exactly right. In general...I actively seek out news and information or I mostly bump into news and information as I do other things or hear about it from others. How often do you watch, read, hear, or see news? Again, by news, we mean any kind of news, including sports, traffic, weather, stocks, politics, lifestyle, or any other kind of news, by any means. How important is it to you personally to keep up with news and information?

The other biggest difference between newspaper subscribers and those of other kinds of publications is the topics people are interested in.

Both groups tend to follow national politics, traffic, weather, sports, and crime and public safety. Newspaper subscribers are more likely to also say they follow news about local politics (19 percent vs. 12 percent). Subscribers of other news sources are more likely to say they follow foreign or international news (13 percent vs. 9 percent).

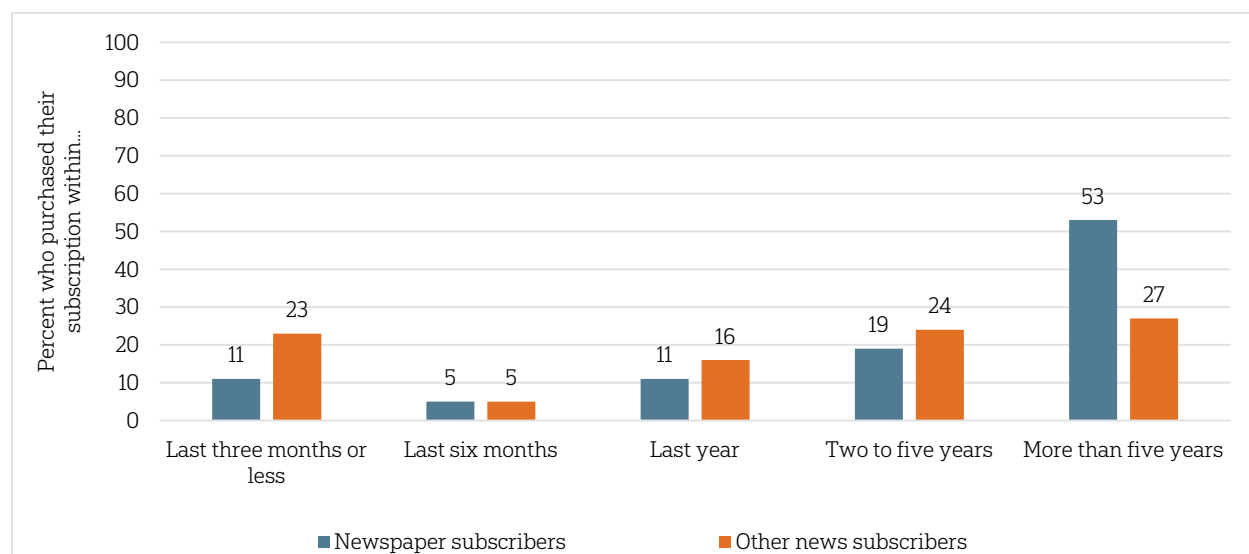
#### Newspaper subscribers and subscribers to other news sources follow similar topics.



Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely? Please select up to three of the following.

A majority of newspaper subscribers have paid for their paper for more than five years. At the same time, 1 in 10 newspaper subscribers started paying in the last three months.

**Newspaper subscribers tend to have paid for their source longer than subscribers of other sources.**

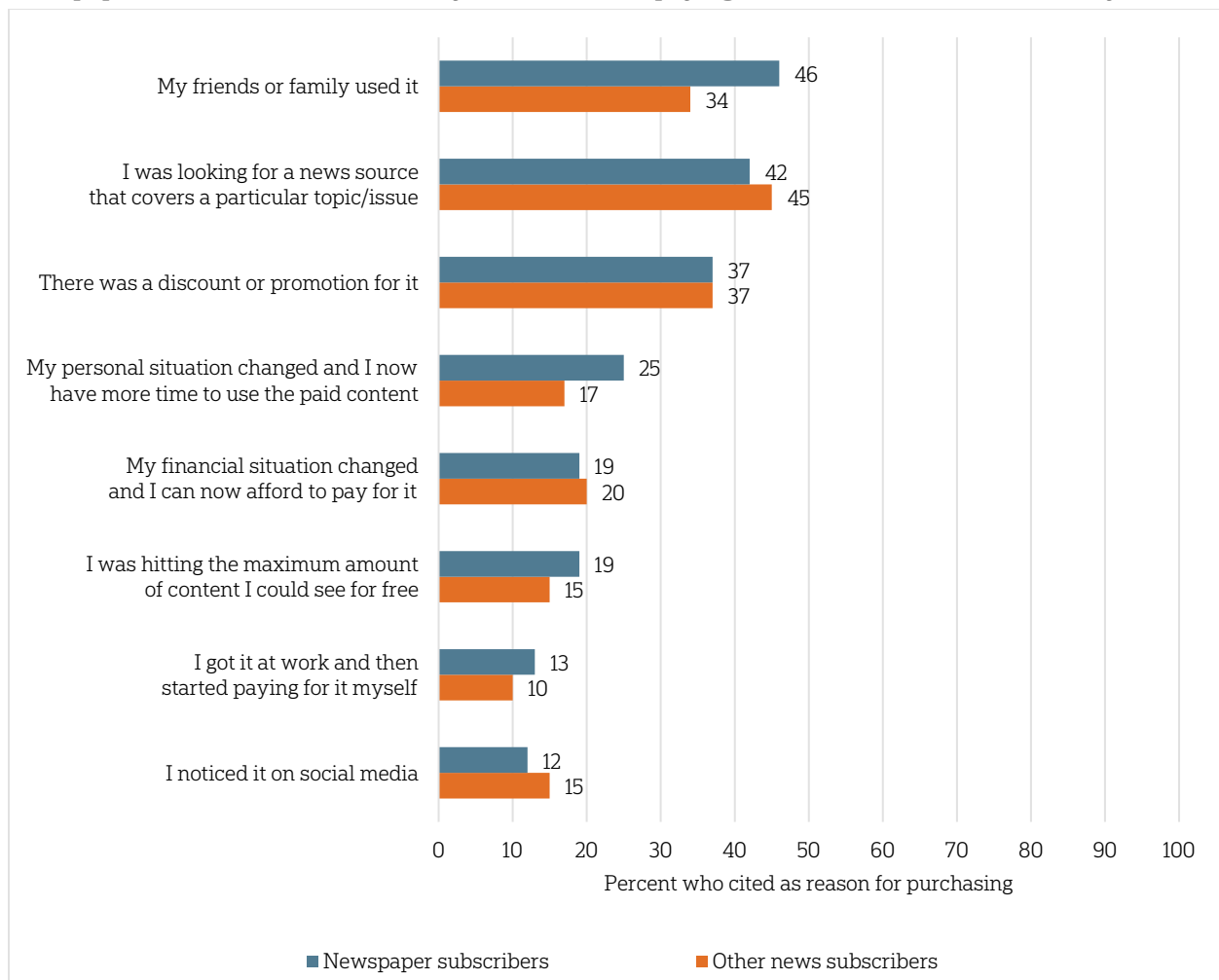


Question: How long have you been paying for [PAID SOURCE]?

People subscribe to newspapers for a variety of reasons, many of them similar to the reasons they cite for subscribing to other kinds of news. But there are some factors for newspapers that stand out. One of them is social connection. Nearly half of newspaper subscribers (46 percent) say they decided to pay in part because their friends or family used, compared with 34 percent of subscribers to other kinds of publications.

Other popular reasons among newspaper subscribers for starting to pay for the source are that they were looking for a news source that covers a topic well (42 percent) and there was a promotion or discount (37 percent), but all of these are similar to the reasons people subscribe to any news.

Going down the list, 2 in 10 newspaper subscribers say they were hitting a pay meter, and only about 1 in 10 say they saw the source on social media.

**Newspaper subscribers are more likely to have started paying because their friends and family used it.**

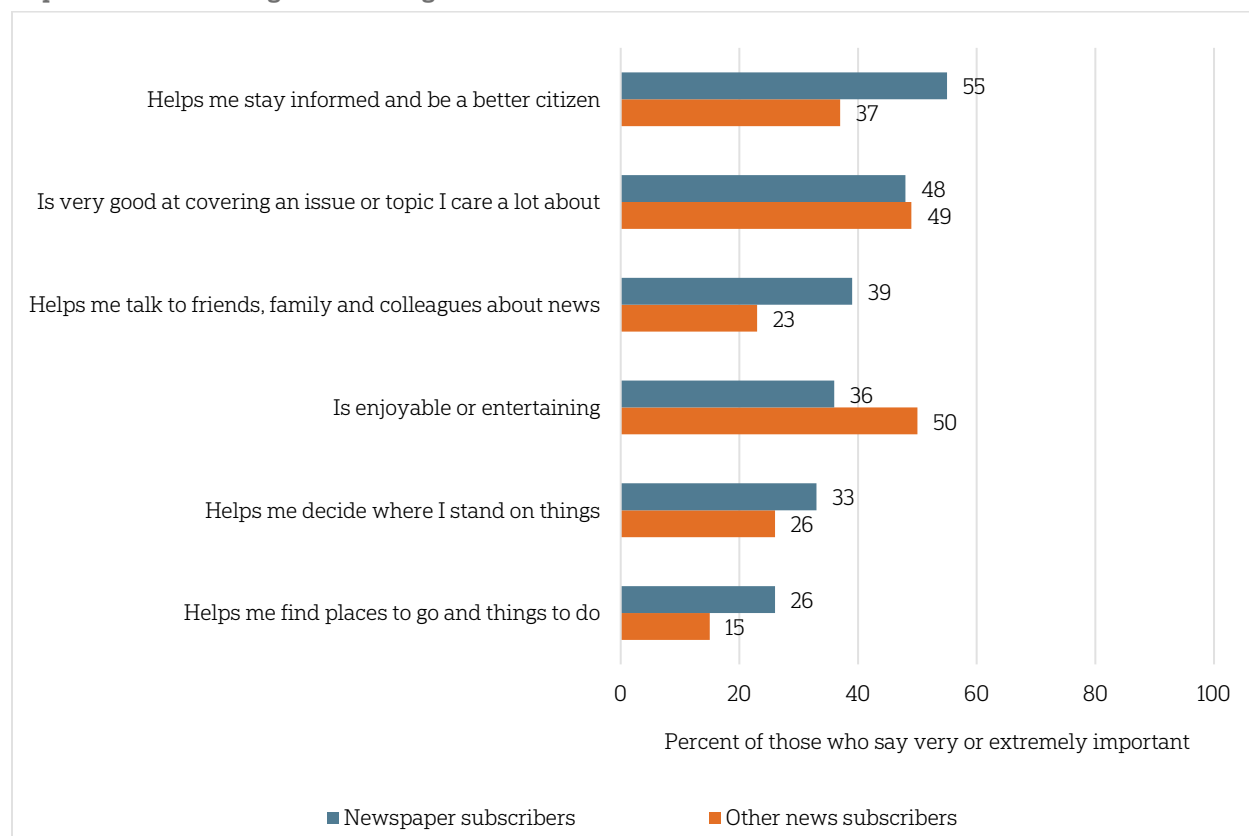
Question: What factors helped lead you to start paying for [PAID SOURCE]?

What about motivations for paying? Are newspaper subscribers different than subscribers in general?

The answer is they tend to be a little more civically minded in their answers than subscribers to other kinds of publications.

For instance, newspaper subscribers tend to place a lot of importance on their news source helping them be a better citizen than subscribers to other publications (55 percent vs. 37 percent) and less importance on a publication being entertaining (36 percent vs. 50 percent). Subscribers of all publications care about that outlet doing a good job of covering an issue that matters to them (about half across the board).

**Newspaper subscribers tend to place a high importance on their source being informative and less importance on it being entertaining.**

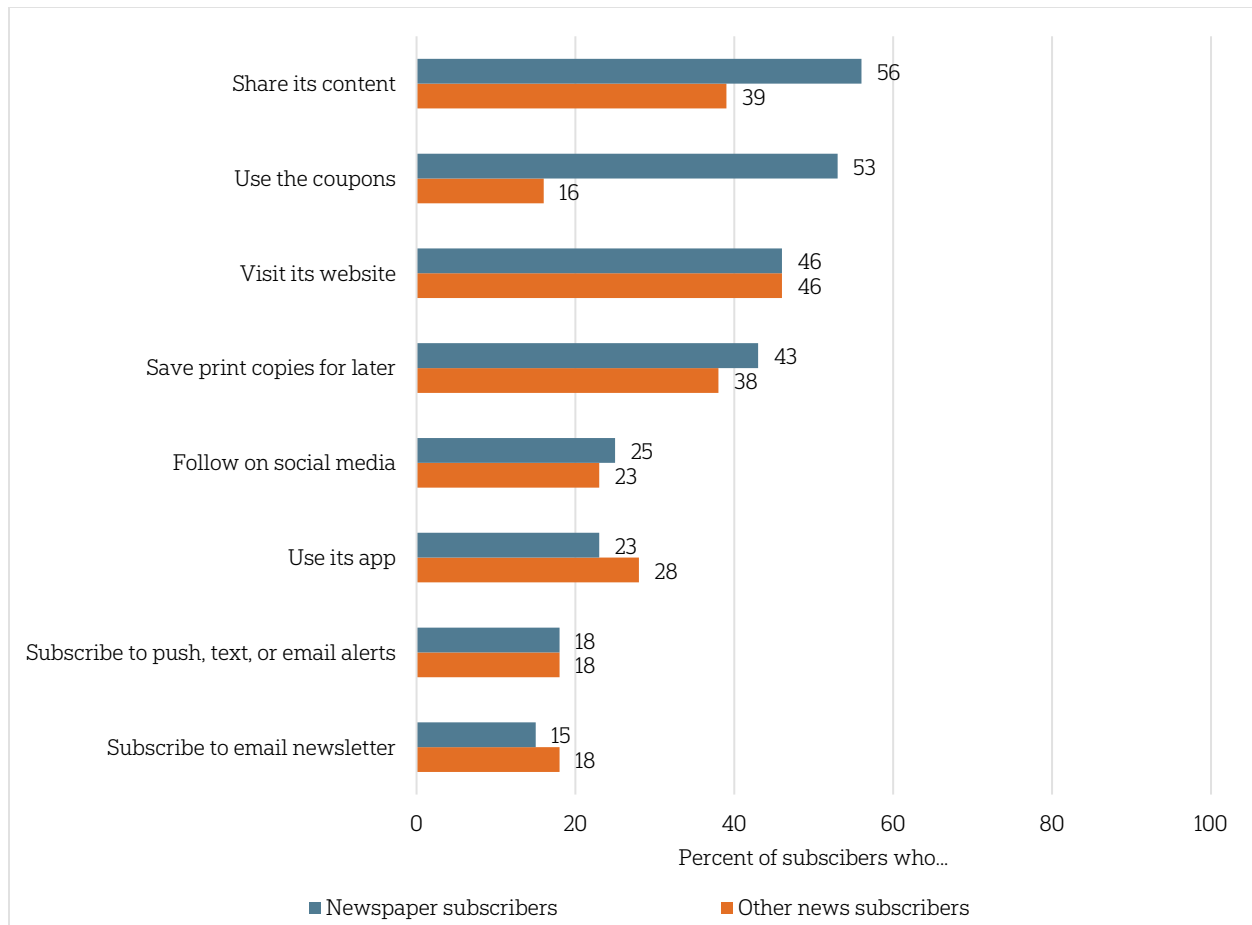


Question: People use news for many reasons. When it comes to the biggest reasons you use [PAID SOURCE], how important to you is it that it...?

And even though many newspaper subscribers say they tend to prefer print, it would be a mistake to think they only engage with the newspaper that way.

Indeed, newspaper subscribers tell us they engage with their sources in a variety of ways related to both print and digital.

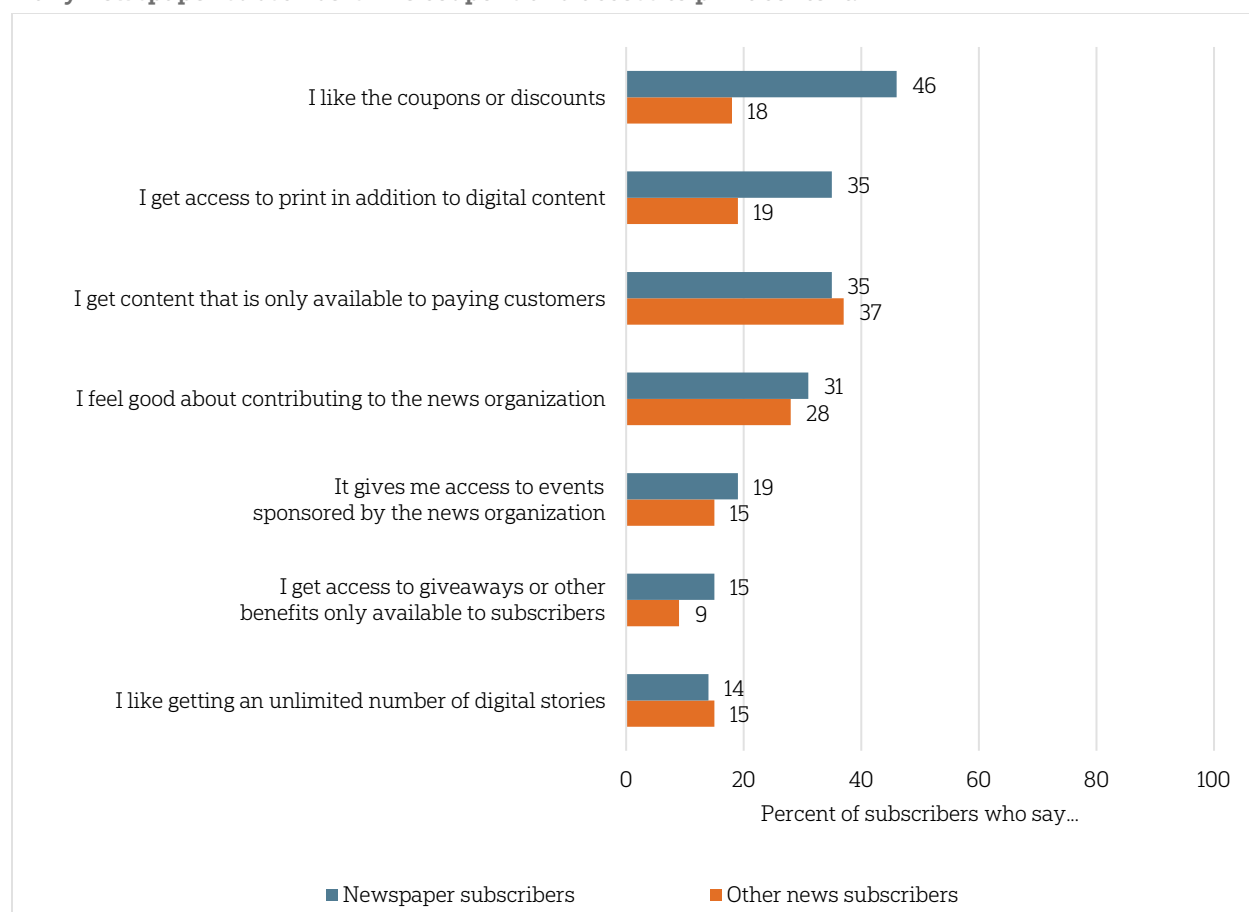
As an example, newspaper subscribers are even more likely than subscribers of other publications to share content (56 percent vs. 39 percent). About a quarter of newspaper subscribers follow the paper on social media and use its app (same as subscribers to other publications).

**Many newspaper subscribers use both print and digital features of their sources.**

Question: In which of the following ways do you interact with [PAID SOURCE]? Do you ...?

When asked about the benefits they receive from their newspaper subscriptions, features related to print versions are the most popular. Nearly half say they like the coupons or discounts while about 1 in 3 say they get access to print in addition to digital content. Only 14 percent say they get an unlimited number of digital stories.

Newspaper subscribers are also more likely than subscribers of other sources to say they like the coupons or discounts and that they get access to print in addition to digital content.

**Many newspaper subscribers like coupons and access to print content.**

Question: What benefits do you get from paying for [PAID SOURCE]?

The majority of newspaper subscribers seem fine with the price they pay. Fifty-two percent of newspaper subscribers say the price of the paper is a very small cost while 38 percent say it is a moderate cost and 9 percent say it is a significant cost. Subscribers to other types of news are even more likely to say the cost is small. Sixty-six percent of subscribers to other sources say it is a small cost, 25 percent say a moderate cost, and 5 percent say a significant cost.

But there is some sign that people are worried about the flip side of the price of newspapers—the value they get for what they pay.

Indeed, 28 percent of newspaper subscribers say the paper is a very good value. Almost twice as many (52 percent) say it is a fair value. And 20 percent say it is overpriced. This suggests that newspapers may have gotten close to the point where they have raised prices about as far as they can. The majority think the price is now fair, and almost as many subscribers think it is too high than think it is too low.

By contrast, subscribers to other kinds of publications indicate there is still room. Here, a majority of subscribers to other news sources say it is a very good value (55 percent), 33 percent say it is a fair value, and only 9 percent say it is overpriced.



## SECTION IV

### WHO DOES NOT PAY FOR NEWS

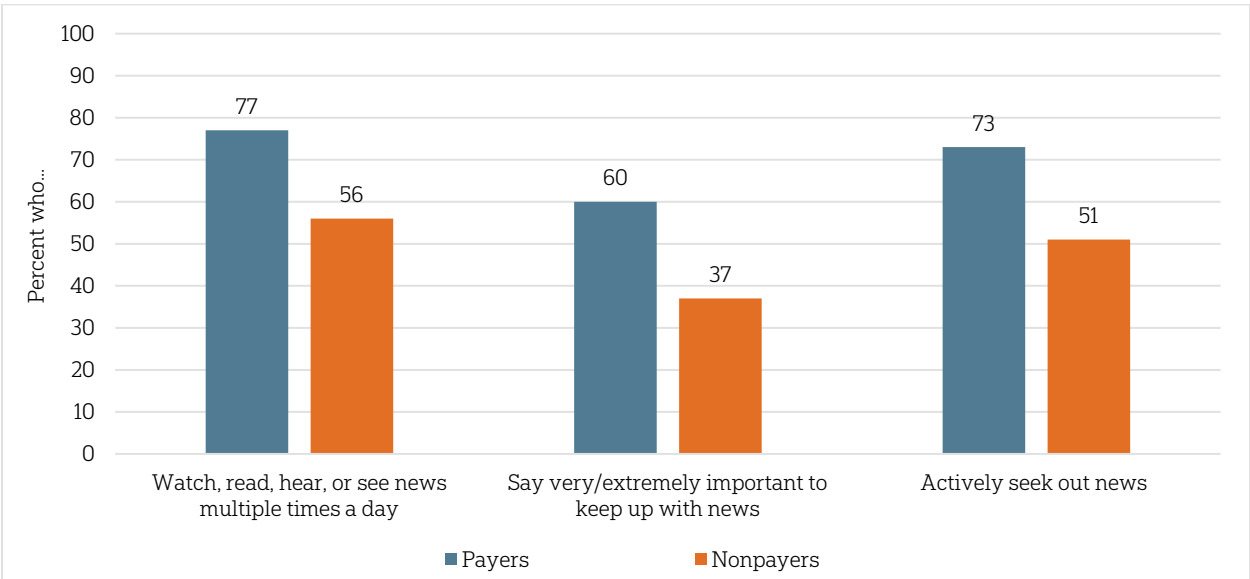
Slightly less than half of Americans in the survey say they do not pay for news from a newspaper, magazine, news app, news site, or donation to nonprofit journalism. Nonetheless, many of those who do not pay for these sources still follow a great deal of news, just less than subscribers do.

For instance, many of those who don't pay for news are heavy news consumers. Among people who mention a specific news source they regularly use but don't pay for, 56 percent see news multiple times a day, another 23 percent say they follow news daily, and just 21 percent see news less than daily.

Rather than strictly a question of behavior, a more subtle but decisive factor in who pays is how important people feel it is to keep up with the news in the first place. For many of those who do not pay for news, keeping up with news is important, but they do not view it as critical in the way payers do.

In all, 37 percent of nonpayers say following news is very or extremely important (compared with 60 percent of those who do pay) while about half (47 percent) say it is moderately important (compared with 33 percent of news subscribers who rate it as only moderately important). And 16 percent of nonpayers say it is not very or not all important to keep up with news. (That number is 6 percent among payers.)

People who pay for news care more about getting news than those who do not pay.



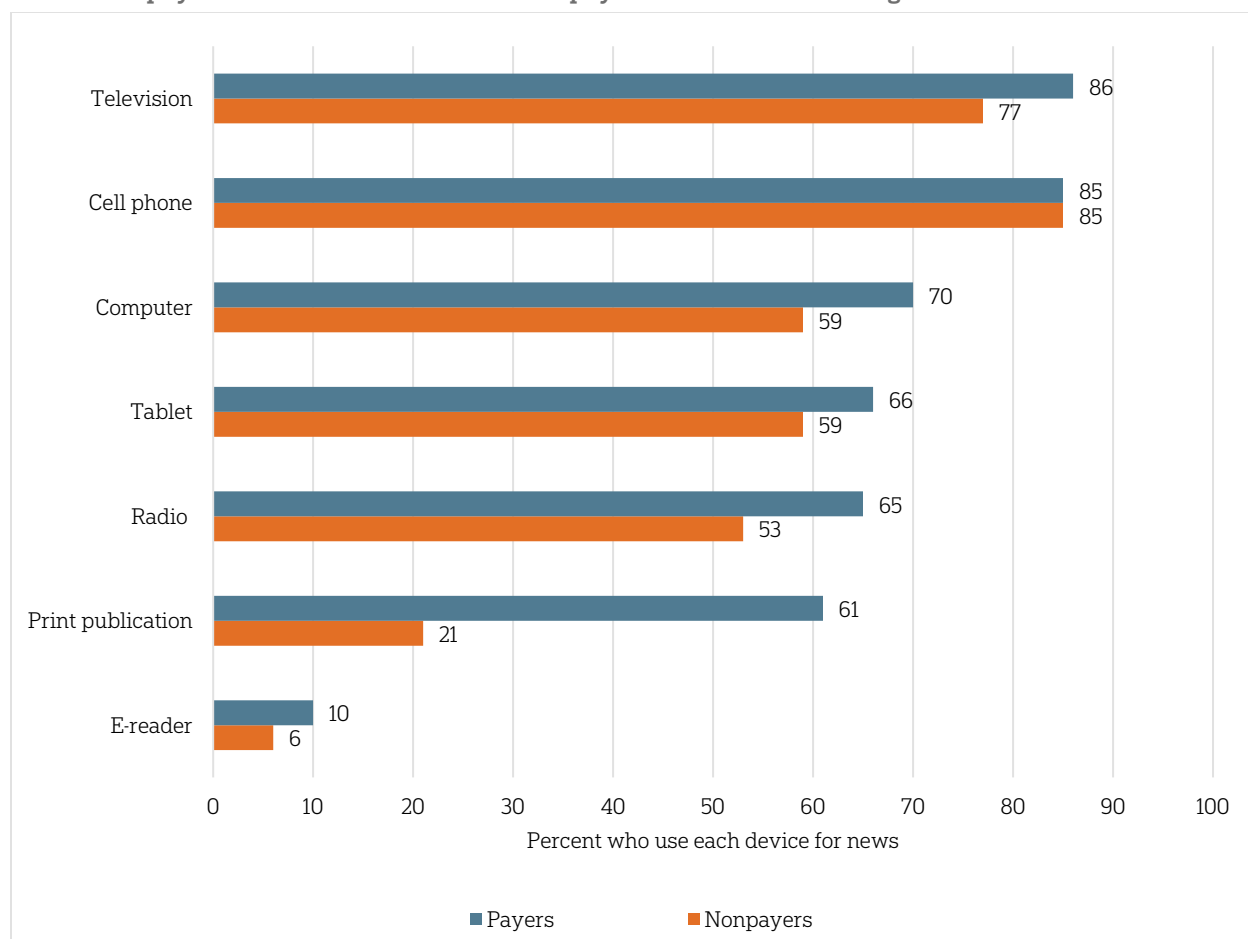
Questions: How often do you watch, read, or hear news? Several times an hour, several times a day, once a day, several times a week, weekly, less often, or never?  
How important is it to you personally to keep up with news and information? Not at all important, not very important, moderately important, very important, or extremely important?  
Choose the statement that best describes you, even if it is not exactly right. In general, I actively seek out news and information or I mostly bump into news and information as I do other things or hear about it from others.

As noted above, many people who do not subscribe to news often still actively seek it out, which may make them an interesting group for publishers to identify. About half of people who do not pay for a news-specific source still say they actively seek out news (51 percent) while the other half say they mostly bump into news (48 percent).

Payers and nonpayers tend to use different types of sources, and payers are more likely to identify a print source as the one they use most frequently. Among those who pay for a source, 61 percent identify a print source as the one they use most frequently, while among those who use a free source, 21 percent identify a print source.

Still, cell phones and television are the top devices for getting news for everyone—those who pay for news and those who do not.

**Those who pay for news and those who do not pay use similar devices to get news.**

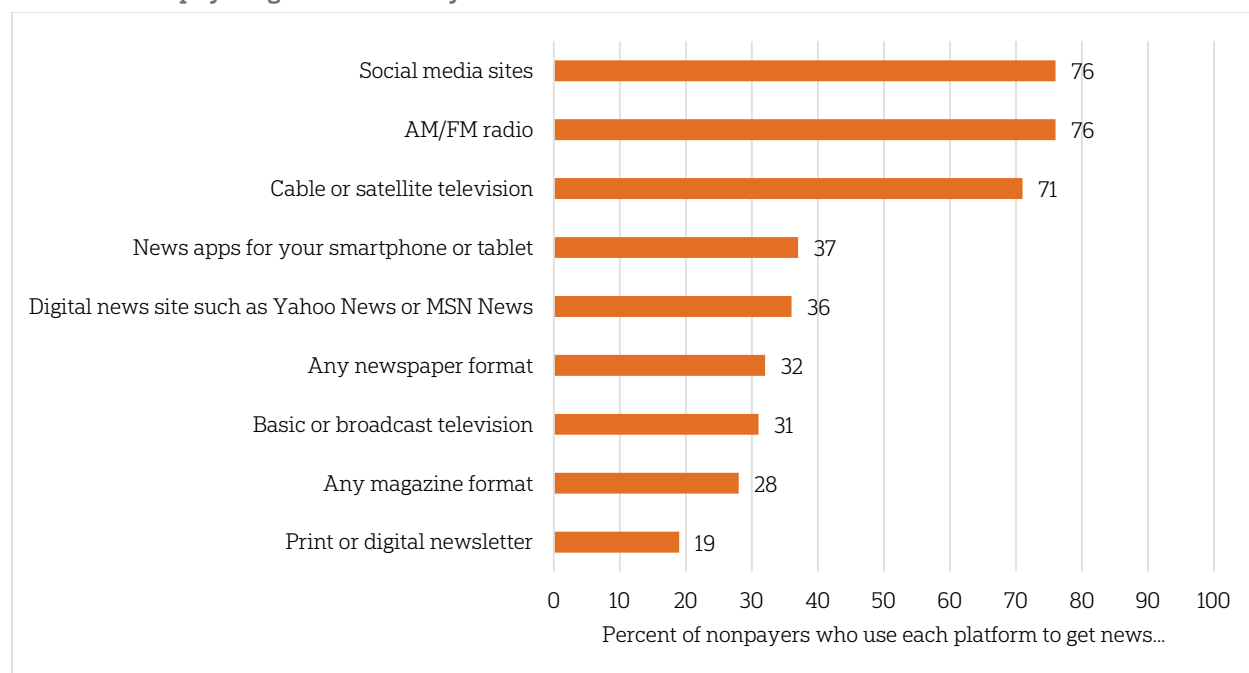


Question: Here are some different devices or technology that you might or might not use to get news and information. Did you use each device or technology to get news and information in the last week, or did you not?

Those who do not pay for a specific news source receive news from a mix of both traditional news platforms and newer digital platforms. About 3 in 4 nonpayers receive news from AM/FM radio, and a similar portion get news via cable or satellite television.

Three-quarters of nonpayers also get news from social media.<sup>3</sup> (It is the same for payers). About a third of nonpayers also get news and information from a news app, go to online-only news sources, and get news from broadcast television or newspapers.

#### Where do nonpayers get news? Everywhere.



Questions: For each of the following types of media, please indicate whether you have used it for free in the last year, or not.

These days many people get their news and information from social media. Do you ever get any news from...?

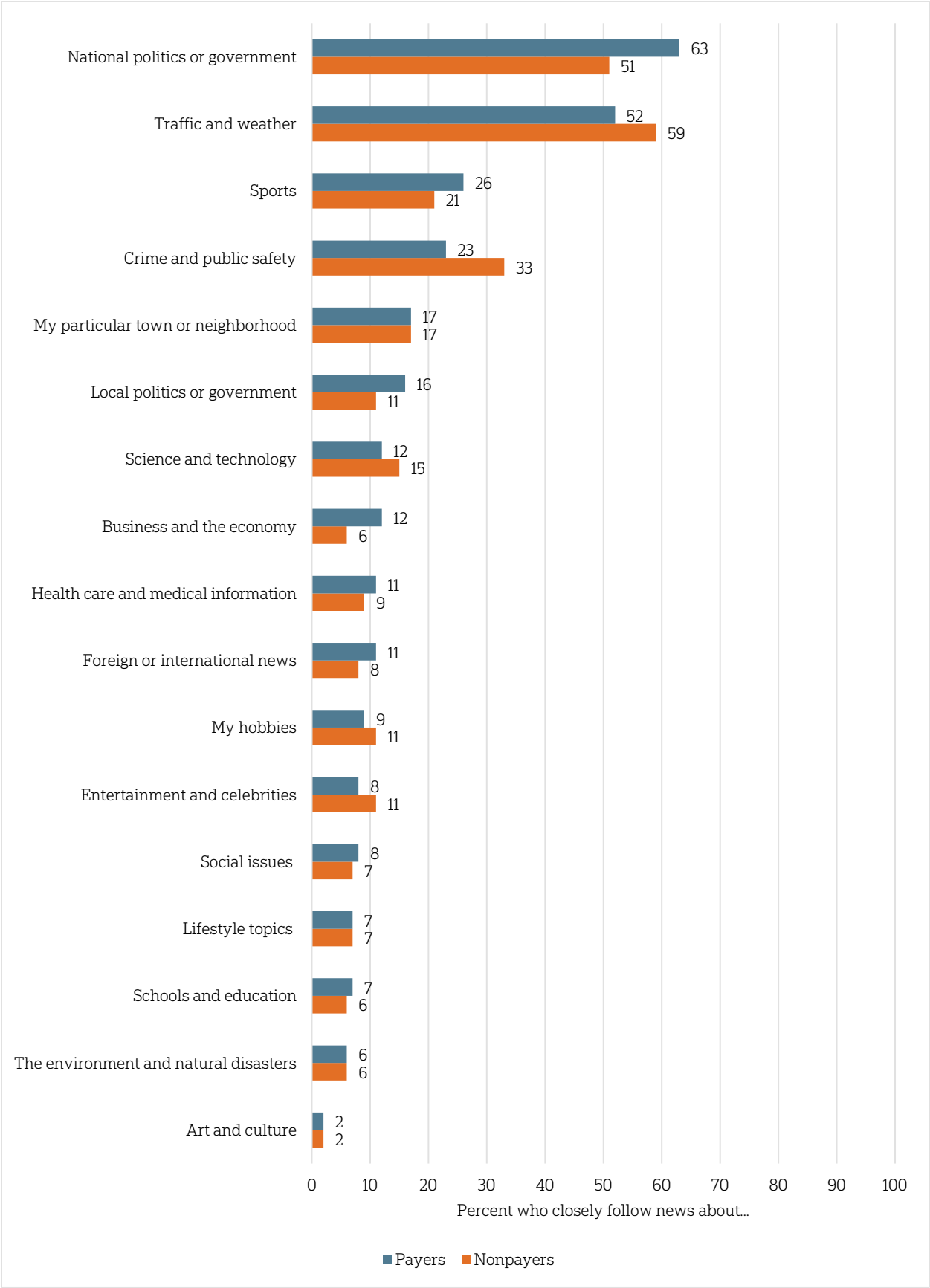
Interestingly, those who do not pay for news follow similar topics to those who do pay. In the survey, we asked people to choose the three topics they most closely follow.

As you can see from the chart below, the rank order of topics for people who pay for news and those who don't pay is nearly identical. For those who subscribe to a specific news source, the numbers for each topic merely tend to be higher.

There are only a few differences: News subscribers are more likely to follow news about the economy and business. They are somewhat less likely than nonsubscribers to follow news about both traffic and weather and crime and public safety.

<sup>3</sup> Respondents were asked if they got news from seven specific social media sites with the following question, "These days many people get their news and information from social media. Do you ever get any news from...?" Seventy-five percent report getting news from at least one of the sites. In a separate section, the survey asked, "For each of the following types of media, please indicate whether you have used it for free in the last year, or not. [Social media sites]." In this format, 54 percent say they have used social media sites for news. About 5 percent of respondents, 134 people, say yes to the general question about getting news on social media, but did not identify a specific platform in the earlier section.

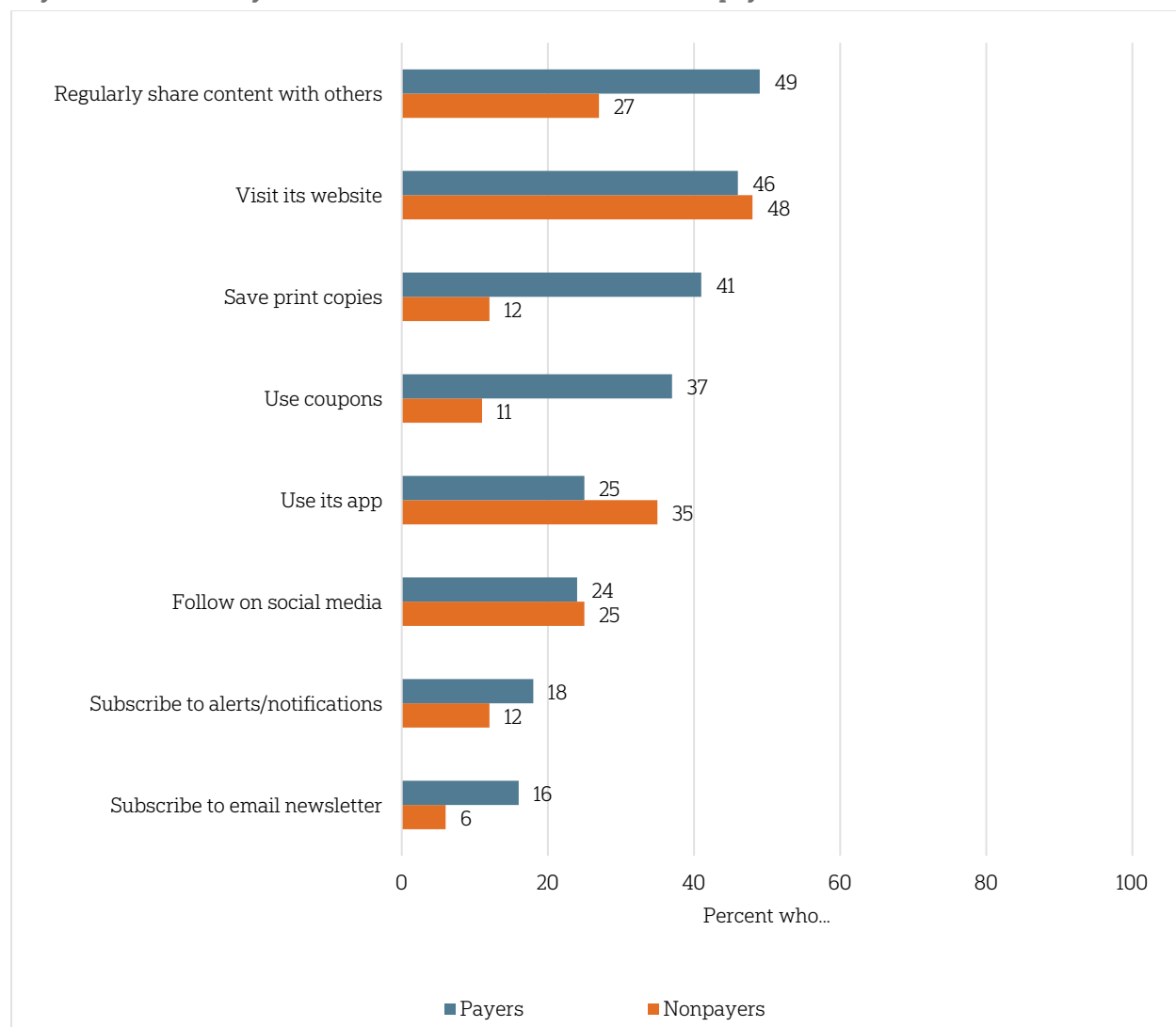
Those who do not pay for news follow similar topics to those who do pay.



Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely?

Payers and nonpayers tend to use their top sources differently, partly due to the fact that payers are more likely to use print. Payers are more likely to share their paid source's content with others and use its coupons compared to nonpayers. On the other hand, nonpayers are more likely to use their free source's app (35 percent vs. 25 percent). There is little difference between payers and nonpayers, however, when it comes to visiting the source's website or following it on social media.

**Payers are more likely to share their source's content than nonpayers.**

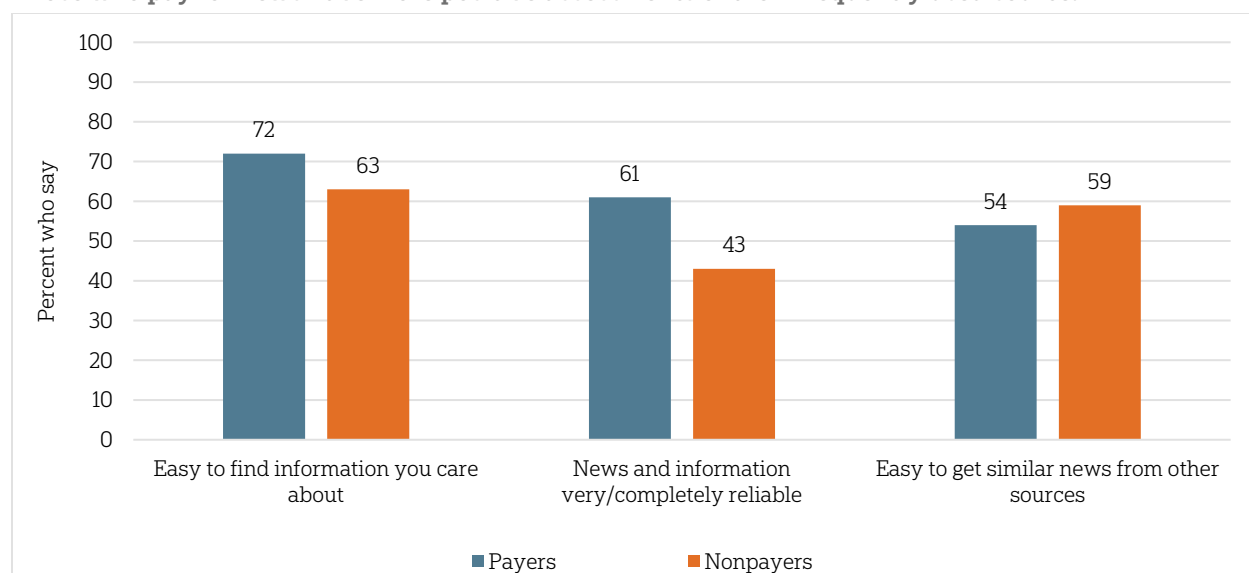


Questions: In which of the following ways do you interact with... ? Do you ...?

Those who pay for news tend to have more positive views about the paid source they use than those who do not pay for their regular source. In particular, those who pay for news are more likely than those who do not to say it is easy to find information they care about from their source (72 percent vs. 63 percent). Similarly, 61 percent of those who pay for news say the news and information from their source is very or completely reliable compared with 43 percent of those who do not pay for the source. These findings suggest there is clearly a link between trust and paying for news. But the differences are not so large as to suggest trust is all there is to it.

Interestingly, there is not a significant difference between people who pay for a source and people who use a free source when it comes to beliefs about how easy it is to get similar content from other sources. Even a majority of people who pay for a news source say it is easy to get similar news from other sources. We think this finding is interesting. It suggests the presence of alternative sources, while important, does not determine why some people pay and others don't. Other more subtle factors are at play as well.

Those who pay for news have more positive assessments of their frequently used source.



Questions: How easy or difficult is it for you to find the news and information you care about from...? Would you say very easy, somewhat easy, neither easy nor difficult, somewhat difficult, or very difficult?  
Thinking of the types of news information you care most about from..., how easy or difficult is it to get similar news and information from other sources? Would you say very easy, somewhat easy, neither easy nor difficult, somewhat difficult, or very difficult?  
How reliable is the news and information you get from...? Completely reliable, very reliable, moderately reliable, a little reliable, or not at all reliable?

## WHY PEOPLE DON'T PAY FOR NEWS

In the same way that we asked those who subscribe to news sources why they did so, we also asked those who did not pay for news the reasons they chose not to do so. People were asked about six potential factors.

Here, the reasons people give for not paying tend to vary based on people's age, education, gender, and race.

Overall, the biggest reason people say they don't pay for news, which over half cite as one of the main reasons, is they can find plenty of free content.

In addition to being able to see free content, 17 percent also say they can get access to paid content in other ways. Some of these non-payers are even quite sophisticated about it. For instance, Michael, a 69-year-old newspaper reader from Phoenix, noted in our in-depth interviews that there are ways to get paid content for free, like articles from *The Wall Street Journal*, "if you know how to do it."

**"I'm a cheapskate," said Sara, a 40-year-old from Phoenix. "I don't want to pay for news when I feel like it's everywhere."**

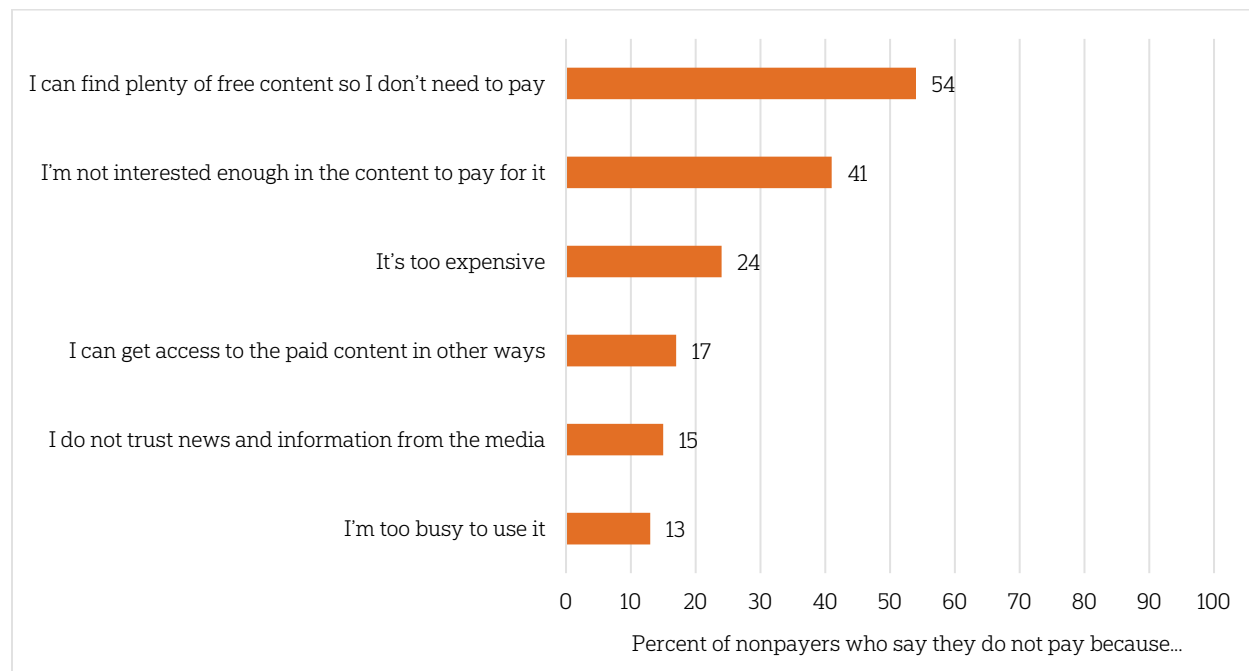


In addition to these people who are navigating carefully around pay meters, another 41 percent of nonpayers admit that they are not interested enough in news to pay for it.

About a quarter of those who don't pay for news say it is too expensive.

Yet trust in media seems to be a smaller factor here. Despite the recent debates over trust and the media, just 15 percent say they don't trust the media enough to pay for it. And 13 percent say they are too busy.

**Free content and a lack of interest are the most common reasons nonpayers say they do not pay for news.**



Question: What are the main reasons why you haven't paid for a news or information subscription in the past year?  
Please select all that apply.

Men tend to see more alternatives to paying for news sources than do women. They're more likely than women to say they do not pay because there is plenty of free content (60 percent vs. 48 percent) and because they can get access to the paid content in other ways (20 percent vs. 14 percent).

Beyond being able to get news for free, however, there are no significant differences between men and women when it comes to citing other reasons for not paying for news.

One potentially challenging finding for publishers is that people with more education are also more likely than those with less education to say they can find alternatives to paid sources.

Fully 71 percent of college graduates who don't pay for news cite the broad availability of free content, as do 61 percent of those with some college education and 42 percent of high school graduates.

But as with men and women, there are no significant differences related to education when it comes to other reasons people say they do not pay for news.

There are also racial and ethnic differences related to believing there is plenty of free content available. Sixty-one percent of whites say there is plenty of free content available compared with 40 percent of Hispanics and 39 percent of African Americans.

But there are not racial or ethnic differences tied to citing any of the other reasons for not paying for news. In past research, we have found that both African Americans and Hispanics believe that while it is easier to get news about the world in general than it used to be, it is not easier now to get information about their own ethnic communities.<sup>4</sup> This could help explain why these two ethnic groups are so much less likely than whites to cite the abundance of free content on the web as a reason not to pay for news.

## THE YOUNG WHO DON'T PAY FOR NEWS

There are also some differences by generation in the reasons people say they do not pay for news. To begin with, younger adults tend to cite *more reasons* for not paying for news than older adults.

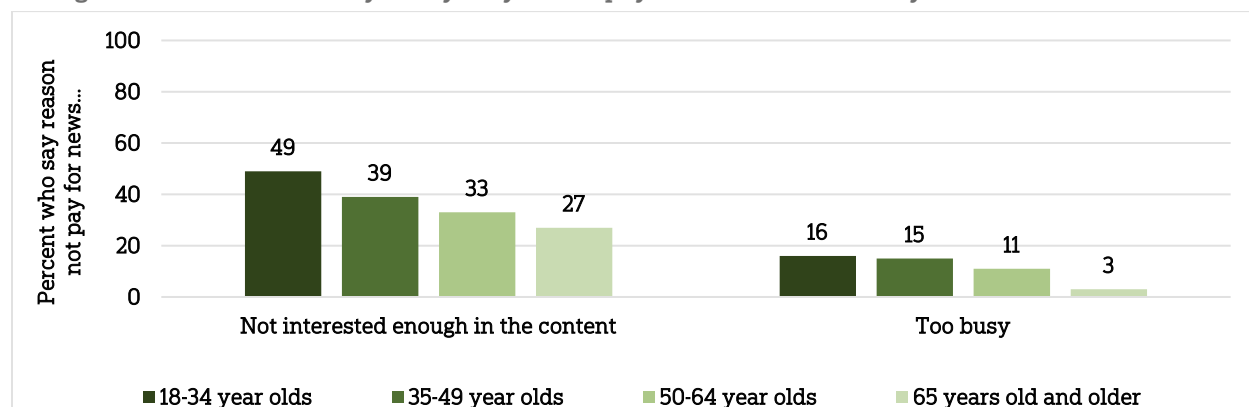
Among them, younger adults are more likely than their elders to say they do not pay because they are not interested enough in the content; they're also more likely to say they're too busy.

Indeed, about half of 18-34 year olds say they are not interested in the content compared with just 1 in 4 of those age 65 and older. And younger adults are about three times as likely as those 65 and older to say they are too busy.

The traditional view once was that these younger Americans will age into news with time. But given the rise of news organizations aimed at younger adults, and the relatively high news consumption rates of young adults on social media and elsewhere, the reality may be more challenging for news organizations than that. Traditional publications may be failing to present the news in ways that engage younger generations, and they may not entirely be covering the right topics.

**As Alicia, a 30-year-old new mother from Phoenix, put it, she used to read “*Cosmo* and that kind of thing, but I think I just had kids and I didn’t have the time to sit there and go through my magazines.”**

**Younger adults are most likely to say they do not pay for news because they are not interested.**



Questions: What are the main reasons why you haven't paid for a news or information subscription in the past year? How about..?

<sup>4</sup> <http://mediainsight.org/Pages/focus-on-african-american-and-hispanic-news-consumers.aspx>

## SECTION V

### “SEEKERS” VS. “BUMPERS” AND A POTENTIAL TARGET FOR NEWS ORGANIZATIONS

In research that the Media Insight Project produced in 2015, we innovated a concept that we think has become an important one in trying to understand the future of news.<sup>5</sup> We asked people whether, on balance, they were more likely to actively seek out news or whether they were more likely to bump into it by accident.

In this survey we wanted to examine the relationship between passive and active news consumption and paying for news.

What we find is these two groups tend to follow news differently, and the distinctions between these groups are particularly stark among those who do not pay for news.

Indeed, there are key differences among nonpayers who seek out news and nonpayers who bump into news across a variety of factors—from the topics they follow, the reasons they do not pay for news, to the likelihood they will pay for news in the future.

Nonpayers are actually evenly split as 51 percent say they actively seek out news (seekers) while 48 percent say they tend to mostly bump into news (bumpers).

And in general, seekers who do *not* pay for news tend to follow news more like those who *do* pay. We think this suggests they are an important group for publishers to understand, identify, and then engage.

Slightly less than 4 in 10 nonpayers age 18-34 actively seek out news compared with about 6 in 10 nonpaying adults age 35 and older. Nonpaying college graduates are more likely to be seekers (66 percent) than those with some college (52 percent) or a high school degree (43 percent).

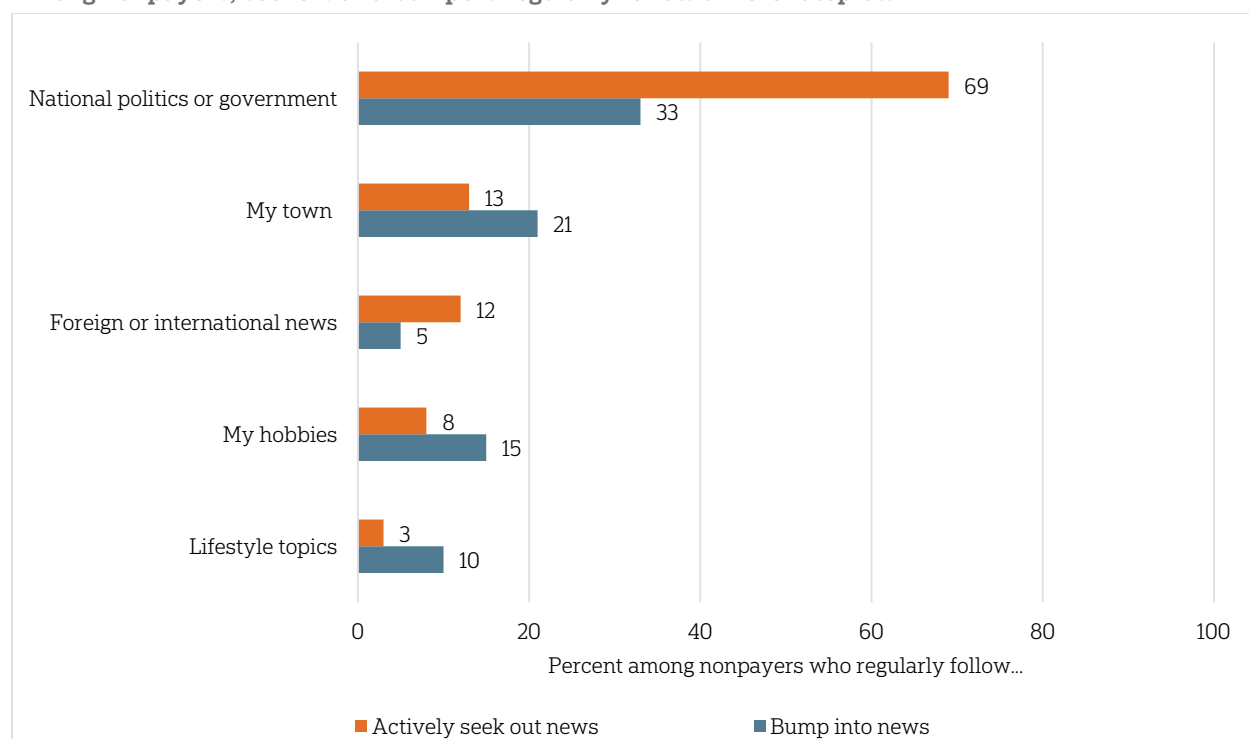
Among nonpayers, men are more likely than women to be seekers (56 percent vs. 47 percent).

Nonpaying seekers and bumpers also tend to follow different topics in the news. News seekers who don't pay for news, indeed, tend to follow similar topics as those who do pay.

For instance, nonpaying seekers are more likely to follow national politics or government and foreign or international news. Nonpaying bumpers are more likely to follow news about their town, about their hobbies, and lifestyle topics.

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<sup>5</sup> <http://mediainsight.org/PDFs/Millennials/Millennials%20Report%20FINAL.pdf>

**Among nonpayers, seekers and bumpers regularly follow different topics.**

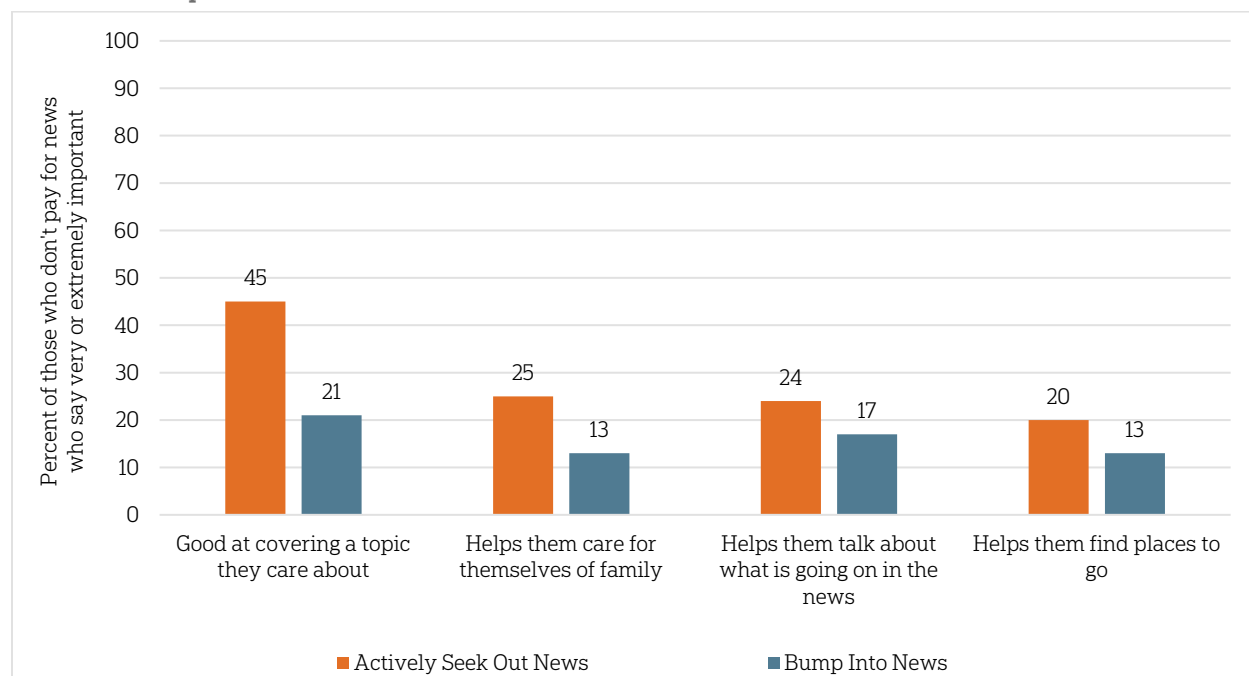
Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely?

Among nonpayers, seekers and bumpers are likely to report different reasons for why they choose not to pay. A majority of bumpers say they are not interested enough in the content. Bumpers are nearly twice as likely to say this as seekers (53 percent vs. 29 percent). On the other hand, seekers who choose not to pay are more likely than bumpers to say they can find plenty of free content and don't need to pay (64 percent vs. 44 percent).

Seekers and bumpers who do not pay for news also use free sources in different ways and evaluate those sources differently. Seekers are more likely to say they started to use their favored free source because they were looking for a source that covers a topic well (33 percent vs. 20 percent). Bumpers are more likely to say they started using their source because they saw or heard about the source at work (27 percent vs. 19 percent). But for both groups social flow was a major factor in leading them to a particular news source. For both bumpers and seekers, the most common reason they started using their preferred free source is because their friends or family used it.

Across several metrics, nonpaying seekers tend to place more value than nonpaying bumpers on how the favorite free source helps them. Seekers are more likely than bumpers to say it is very important that their free source is good at covering a topic they care about, helps them care for themselves or family, helps them find places to go, and helps them talk to friends and family about what is going on in the news.

**Among those who don't pay, seekers are more likely than bumpers to place importance on how their free source helps them.**



Question: People use news for many reasons. When it comes to the biggest reasons you use [FREE SOURCE], how important to you is it that it...?

Nonpaying seekers also are more likely to have positive views of their favored news source than bumpers. For instance, they are more likely to say it is very easy to get news from their source (70 percent for nonpaying seekers vs. 56 percent for nonpaying bumpers); they are also more likely to say that the information from their source is very reliable (52 percent vs. 34 percent).

Among those who do not pay for news, seekers say they are also more willing to eventually pay for their favorite free source. Indeed, 21 percent of seekers say that it is at least moderately likely they would pay for news and information for their preferred source, compared with 11 percent of bumpers.

Interestingly, seekers who do not pay for news now are much more receptive to the hypothetical idea of paying for news if it were in a bundle of publications. Fully 42 percent of nonpaying seekers say they would be at least a little likely to subscribe to their free source if it also included access to paid content from other news sources, compared with 29 percent of those who bump into news.

## SECTION VI

### PRINT VS. DIGITAL SUBSCRIBERS—DEMOGRAPHIC DIFFERENCES AND PATHS TO SUBSCRIPTION

Overall, 58 percent of subscribers describe themselves as primarily print-oriented, and 28 percent say they are primarily digital. Among just newspaper subscribers, even more (75 percent) describe themselves as print-oriented. But these numbers look very different when we break people down by demographic groups.

Among those who pay, Hispanics are particularly likely to use primarily a digital version (45 percent) compared with 34 percent of African Americans and 23 percent of whites.

And the age differences between print and digital payers are striking. Older adults are much more likely to pay for print over digital.

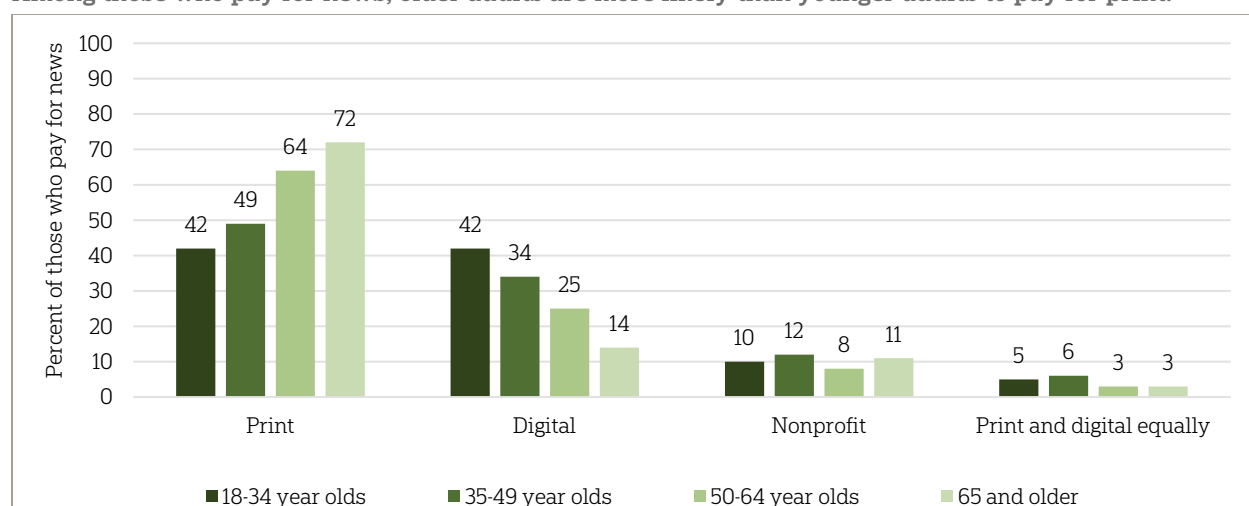
Adults age 65 and older who pay for news are five times more likely to buy print than digital (72 percent vs. 14 percent).

By contrast, younger adults age 18 to 34 are equally likely to pay for print or digital (42 percent in both camps).

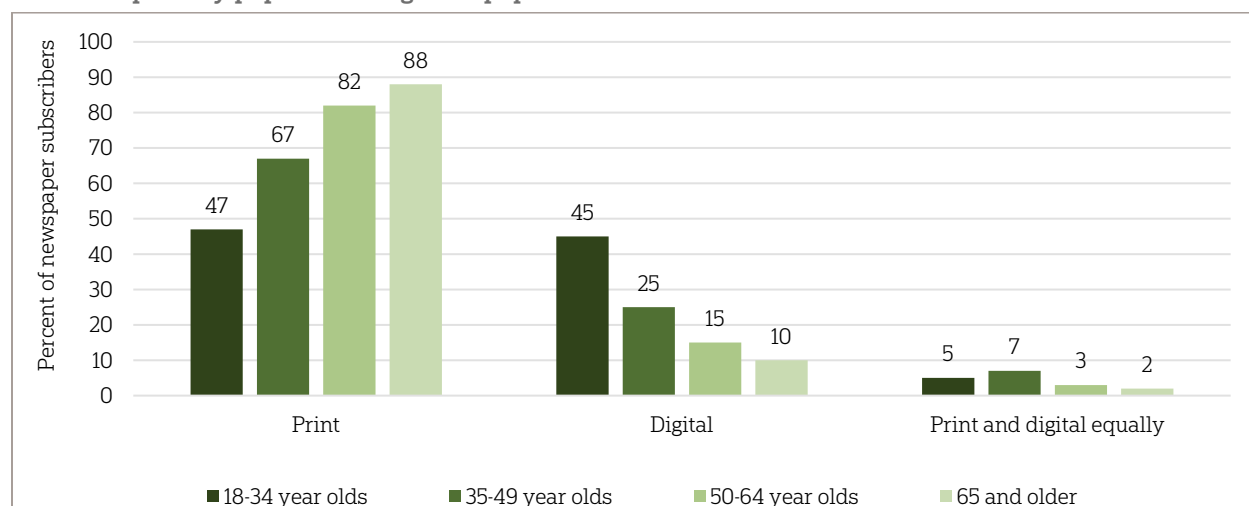
In other words, any forward looking subscription strategy has to lean more digital, even if the current subscriber base is in print.

But that is only the beginning of why digital approaches make sense even in the short term.

**Among those who pay for news, older adults are more likely than younger adults to pay for print.**



**Print is especially popular among newspaper subscribers.**



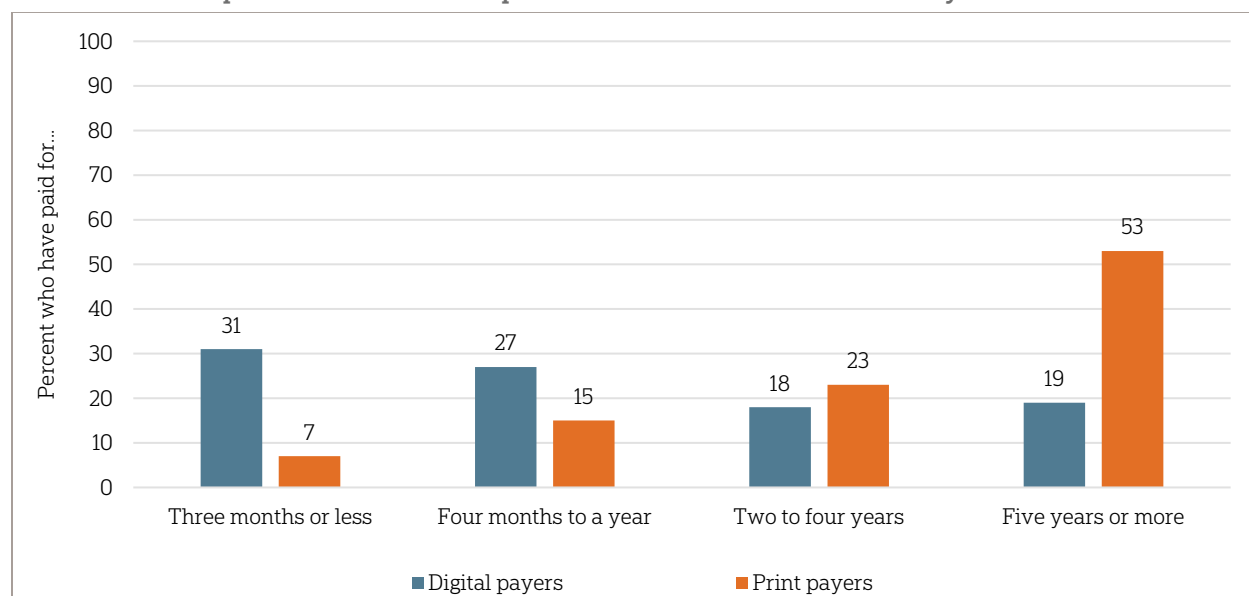
Question: Next, we are interested in whether you paid to use any media in the last year. For each of the following types of media, please indicate whether you personally have a subscription or pay for it on a regular basis, or not.



Digital subscribers are much more likely to have started using a source recently. About 1 in 3 digital subscribers say they began paying for the source less than three months ago. Only 7 percent of print subscribers are such recent customers.

Most print subscribers (53 percent), on the other hand, have had their subscriptions five years or longer. Only 19 percent of digital subscribers fit in that group.

**More than half of print subscribers have paid for their favored source for five years or more.**

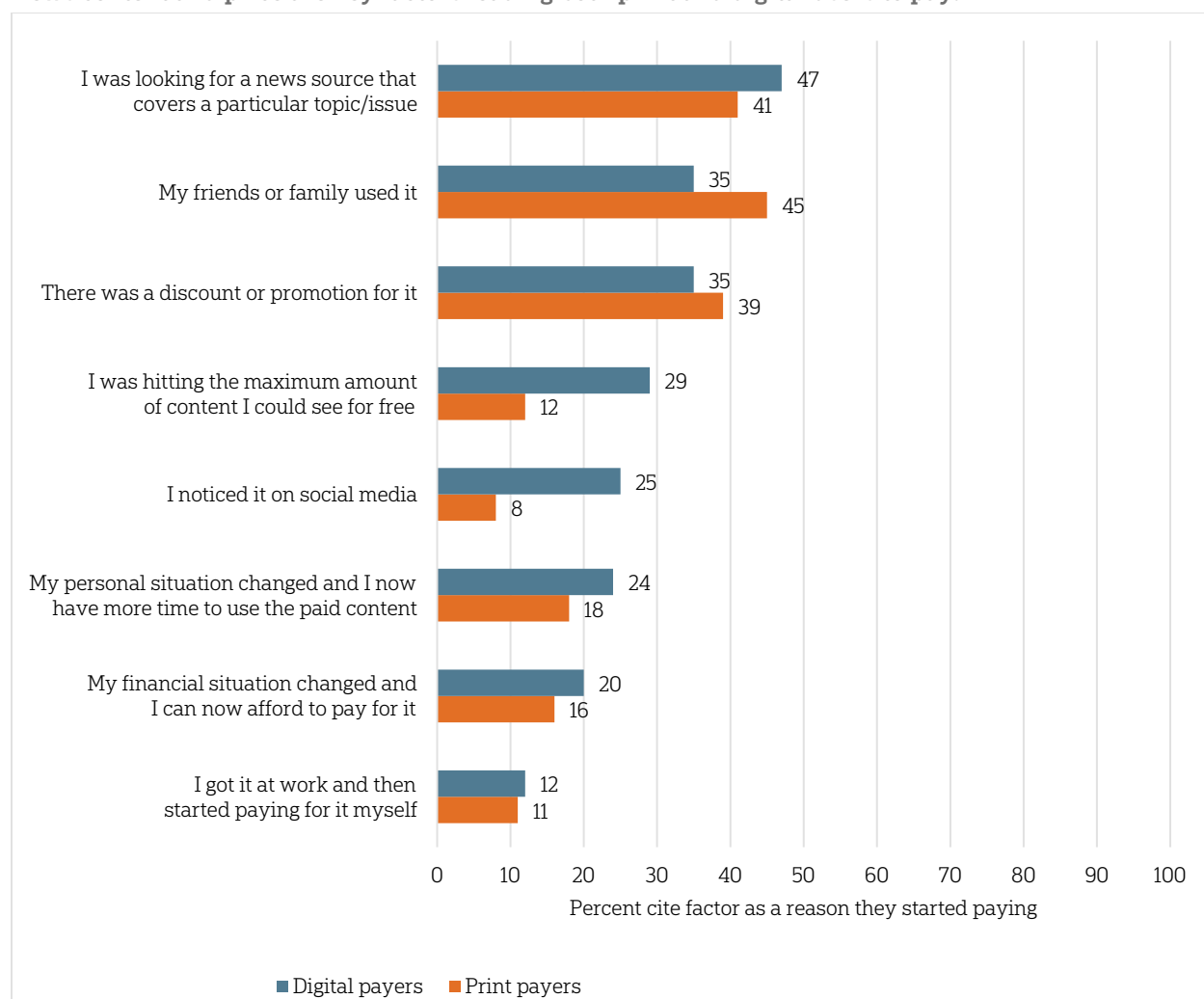


Question: How long have you been paying for [PAID SOURCE]?

Are digital subscribers motivated to pay for different reasons than print subscribers? For the most part, the two groups are moved by the same factors. Quality and price, for instance, are key elements that trigger people to subscribe, whether a consumer is getting a print or a digital subscription. The perception that a news outlet is good at covering a particular topic and a discounted subscription promotion are among the two top reasons for both groups as well.

But digital subscribers are more likely than print subscribers to also say they started to pay because they noticed the publication on social media (25 percent vs. 8 percent). Digital subscribers are also more likely to say they were hitting the maximum amount of content they could get for free (29 percent vs. 12 percent).

How important is the idea of the pay meter counting down—and the threat of losing access each month—in persuading a user to become a subscriber? The data suggests it has its limits even for potential digital subscribers. To begin with, meter alerts rank fourth among reasons for paying (out of eight queried), with about the same number as those who say they began to notice the news source in their social media stream. And while 29 percent of digital subscribers say they noticed they were hitting their limit, the flip side is 7 out of 10 don't cite that as a factor. In other words, other elements of reaching digital subscribers are more important than meter warnings. They are simply part of a suite of elements—along with the coverage of a particular topic or promotions—that matter when trying to persuade potential subscribers to pay.

**News content and price are key factors leading both print and digital users to pay.**

Question: What factors helped lead you to start paying for [PAID SOURCE]?

## PRINT VERSUS DIGITAL SUBSCRIBER ENGAGEMENT

Are there differences in the ways subscribers use news in print versus digital?

In many ways, news consumption is similar across formats. The differences that do exist are largely those one might expect based on technology.

As an example, the majority of print-oriented subscribers say they use the coupons (51 percent) and a similar number (55 percent) are saving copies of the paper for use later.

But it isn't as though digitally oriented subscribers don't use coupons as well; 15 percent do, and even more (21 percent) save copies for later.

Print-oriented subscribers have digital behavior, too. Fully 38 percent of subscribers who describe themselves as primarily print users also visit the source's website.

And the findings show that the sharing of news is not something that began with the web, email, or social media. Fifty-five percent of print-oriented subscribers—as many as use coupons—share content with others.

Sharing is high among all age groups, though it is highest among the oldest adults. Sixty-three percent of print subscribers age 65 and older share content compared with 58 percent of those age 50-64, 49 percent of those age 30-49, and 38 percent of those age 18-34.

What distinguishes digitally oriented subscribers?

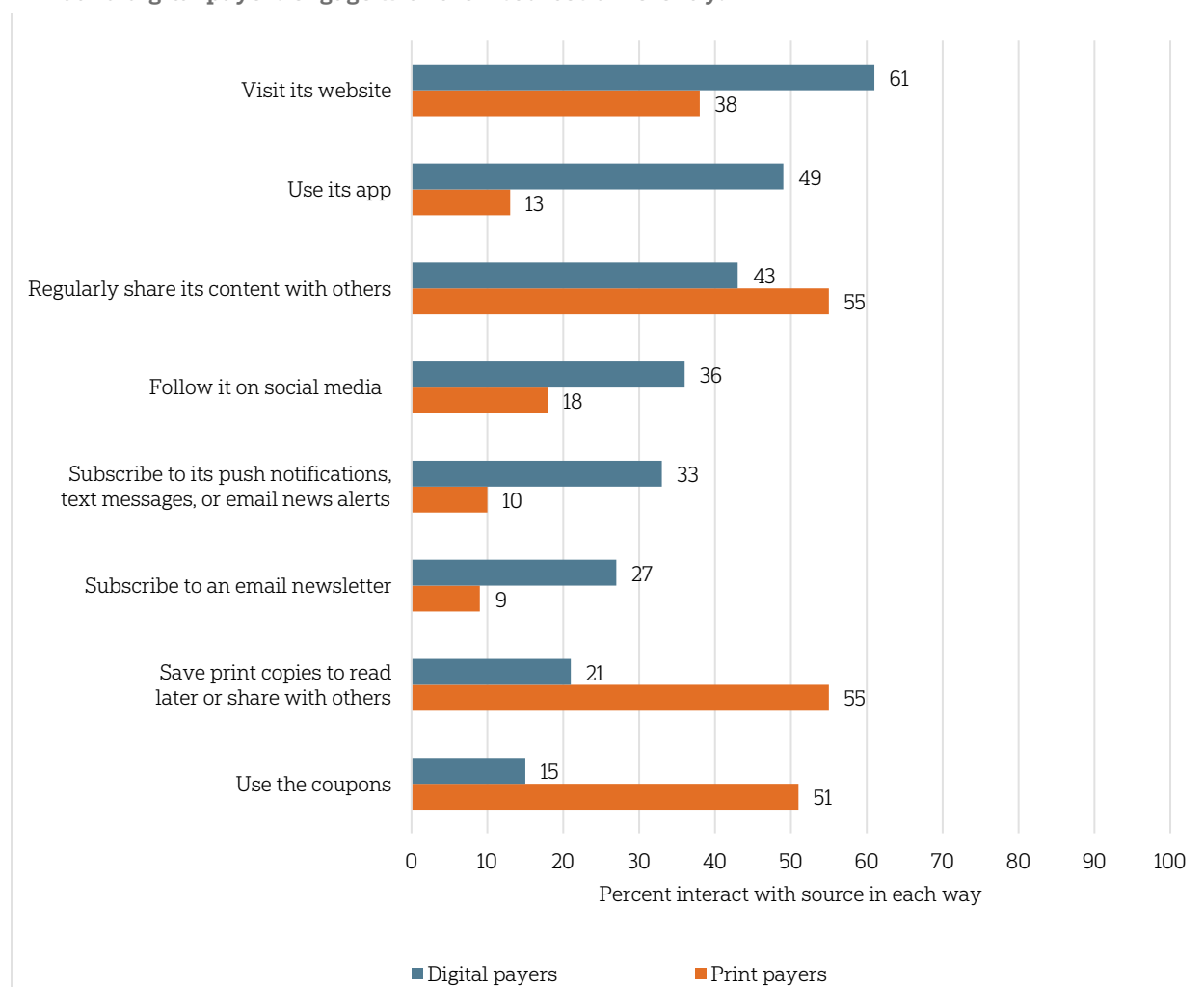
They engage with publishers in multiple ways for one thing. For instance, among those who prefer digital, 61 percent visit the website, 49 percent use the app, and 43 percent share content with others. Digital subscribers are also more likely than print-oriented subscribers to sign up for alerts or email newsletters and to follow a publication on social media.

Some of the differences between print and digitally oriented subscribers have to do with the convenience of digital. Digital payers are significantly more likely than print payers, for example, to use their favored source multiple times a day (28 percent vs. 5 percent).

All this has implications for how publishers should serve digital subscribers. A significant number of digital subscribers likely want the news updated regularly. This may also be true for print-oriented readers. Indeed, fully 77 percent of subscribers who turn to their favorite source mainly in print say they get news multiple times a day (but just 5 percent do so using their favored source). That number is virtually identical to the number of digitally oriented subscribers (78 percent) who usually get news multiple times a day.

For both groups, print and digital subscribers, social media is a major part of this frequent news acquisition. Fully 73 percent of news subscribers now say they get news from social media.

And it is worth repeating that many of these activities are not exclusive for either those who prefer digital or print, as many payers can access both formats. Remember, 4 in 10 print subscribers still go to the website; 2 in 10 follow it on social media. Conversely, 1 in 10 people who prefer digital use coupons from their source, and 2 in 10 save copies.

**Print and digital payers engage with their sources differently.**

Question: In which of the following ways do you interact with [PAID SOURCE]? Do you ...?

If there is a fair amount of overlap in the behavior of print and digital subscribers, do the two groups differ in what they say they value about their subscriptions?

Here again, digital and print subscribers are more similar than different. They both tend to value a variety of aspects about their favorite publications rather than just one or two. They both like having access to content nonsubscribers cannot get (37 percent for digital and 39 percent for print). And they both feel good about contributing to the news organization (33 percent for digital vs. 25 percent for print).

And are print- and digitally oriented subscribers different in the basic question we asked of all news consumers: why they gravitate to a particular news source in the first place? No. When it comes to how they use the news and why they get it, print and digital subscribers look very similar.

They both think it's very important that the publication they pay for be good at covering an issue or topic they care about; they both think the news helps them stay informed and be a better citizen. The only significant difference between print and digital subscribers is that print subscribers are more likely to put a higher value on the news source being enjoyable or entertaining (46 percent vs. 33 percent).

## PREFERENCES BETWEEN PRINT AND DIGITAL VERSIONS OF SUBSCRIPTION

We were also curious how many people today now consider themselves both print and digital subscribers fairly equally, without a clear preference. As we noted in the overview, that group—which might be called the blended news subscriber—is very small. Overall, only 4 percent of subscribers put themselves in that camp; among just newspaper subscribers, the rate is the same (4 percent).

Five percent of print payers say it is very or extremely likely they would transition to a digital-only subscription, 14 percent say moderately likely, and 79 percent say not too likely or not at all likely. Print payers age 65 and older tend to be more certain than younger adults that they won't switch to digital-only (85 percent), yet 69 percent of those age 18-34 still say they are not too likely to switch either.

Those numbers suggest that publishers thinking of leaning more heavily on subscription revenue from print heritage media, particularly newspapers, will likely find their audience base continuing to want print for as long as possible.

What is it these two groups like most about their preferred format?

The print-oriented readers, in rank order, find print easier to read (64 percent), feel like they get (or maybe notice) more news in print (38 percent), like the printed coupons (30 percent), and like saving print copies to read later (29 percent).

These preferences among the print-oriented vary somewhat by age.

The older people are, the more likely they are to say they find print easier to read: 61 percent of those age 35-49, 68 percent of those age 50-64, and 71 percent of those 65 and older like the ease of print. But a substantial minority of 18-34 year-old subscribers (44 percent) agree. By contrast, the youngest adults are most likely to say print is less expensive than digital (22 percent compared with 7 percent of those 35-49 years old, 8 percent of those 50-64 years old, and 6 percent of those 65 and older).

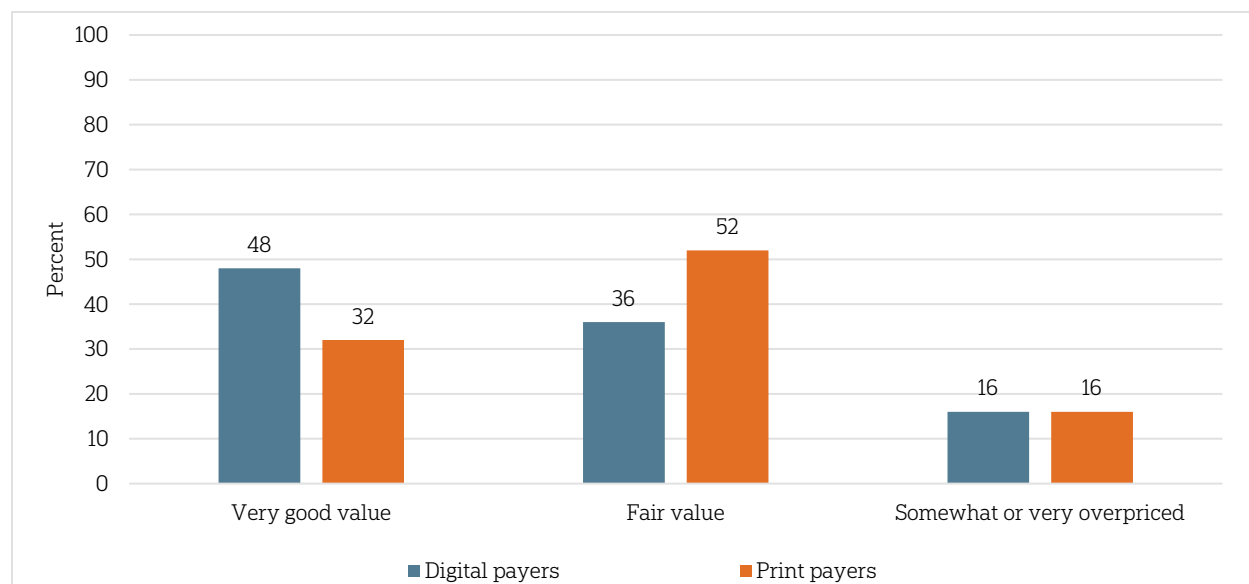
And what makes digital subscribers prefer that format? The top reason these subscribers say they prefer digital is they can access content anywhere (64 percent). But a substantial minority of digital subscribers also say they think digital is easier to read (39 percent). Almost as many say they prefer digital because it's less expensive (35 percent) and the content is more frequently updated (33 percent).

## DIGITAL PAYERS FEEL THEY GET MORE VALUE THAN PRINT PAYERS

Most people who pay for news think journalism is a good value, but the rate to which they say so does vary whether they are a print oriented or digitally oriented subscriber even though digital is an arena where more content is free. Digitally oriented subscribers are more likely than print payers to say the subscription price they pay is small (67 percent vs. 56 percent). Roughly 1 in 3 digital and print subscribers say it is a moderate cost. Less than 1 in 10 of either group think the cost is significant to them.

As for the flip side of price, the value they get from paying for news, here digital subscribers are more likely to say the source is a very good value for the price (48 percent vs. 32 percent of print subscribers). Print subscribers are more likely to say it is a fair value.

### Digital payers are more likely than print payers to say their source is a very good value.



Question: Think about your satisfaction with [PAID SOURCE] given the price you pay for it. Which statement comes closest to your opinion? It is a very good value for the price. It is a fair value for what it gives me. It is somewhat overpriced and not a good value. It is very overpriced compared to the value it gives me.

## PAYERS AND NONPAYERS ENGAGE WITH NEWS ON SOCIAL MEDIA

Some may think social media is a special challenge for publishers—that the people who encounter their content through platforms like Facebook, Twitter, or Instagram will never become subscribers.

The findings here suggest that that is an oversimplification—and one that may lead publishers to miss an important opportunity.

To begin with, subscribers are just as likely as nonsubscribers to follow a publication on social media. What's more, subscribers are even more likely than others to share content.

So contrary to discounting social media as part of a subscription strategy, the opposite may be true. Engaging with one's most loyal consumers on social media, the data suggests, is an important way of expanding one's audience by having loyal users share and endorse a publisher's content. In effect, publications should work hard to empower their subscribers on social media to become their ambassadors and marketers.

The key challenge for publishers may be to have the capacity to know whether the person who is arriving through Facebook might be the same person who is arriving on a different occasion to their homepage, perhaps on another occasion coming as a registered user through their app, and also subscribing in digital and print. The survey data suggests clearly that some users are doing all of these—even if publishers do not always recognize them as the same person.

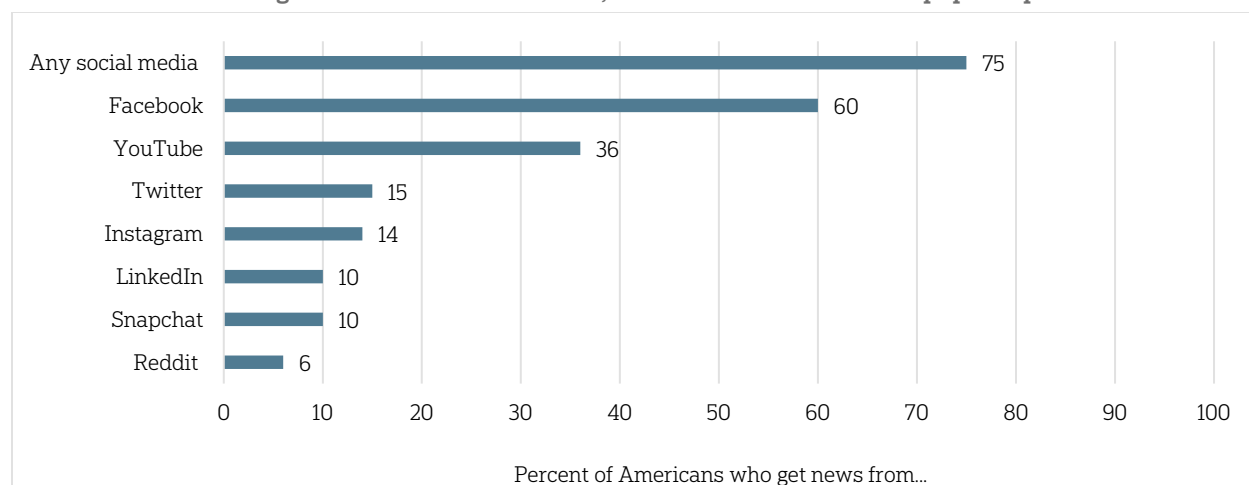
In all, about 3 in 4 adults report that they receive news from at least one social media platform, and social media is a popular news source for both those who pay for news as well as those who do not. Fully 73 percent of those who pay for news also get it in social media versus 76 percent of those who do not pay for news.

Indeed, social media is an important way for subscribers to stay connected with their favored news sources. If anything, we believe the evidence suggests that this may be an underused way of engaging with core audiences. In all, 24 percent of those who pay for news follow their regular paid news source on social media.

This level of engagement with a preferred source on social media is the same for people who don't pay—25 percent say they follow their regular free news source on social media.

Facebook is the most popular social media site for news, as 6 in 10 adults report getting news from Facebook. Many Americans also get news from YouTube (36 percent), Twitter (15 percent), Instagram (14 percent), LinkedIn (10 percent), Snapchat (10 percent), and Reddit (6 percent).

**Three in 4 Americans get news from social media, and Facebook is the most popular platform.**



Question: These days many people get their news and information from social media. Do you ever get any news from...?

Those who pay for news are twice as likely as those who do not pay to get news from LinkedIn (13 percent vs. 6 percent). Interestingly, there are no other significant differences between payers and nonpayers when it comes to getting news on other social media platforms.

The numbers suggest not only that some platforms are used by more people than others but that some platforms lend themselves to more frequent use for news.

Among those who use each platform, 58 percent receive news from Facebook multiple times a day compared with 47 percent from Instagram and 43 percent from Snapchat.

Similarly, 38 percent of Reddit users say they get news there multiple times a day, as do 35 percent from Twitter.

YouTube news consumers are somewhat less likely to look at it for news several times a day (23 percent).

And LinkedIn users tend not to use it as frequently for news. Just 8 percent say they turn to it multiple times a day.

Interestingly, there are no significant differences between news payers and those who do not pay for news when it comes to the frequency of getting news on social media.

## DEMOGRAPHICS OF GETTING NEWS ON SOCIAL MEDIA

About three-quarters of Americans of all races and ethnicities, and socioeconomic groups receive news from social media.

The survey did find some differences in the likelihood of getting news from social media related to gender and age.

Women are more likely than men to say they get news from social media (80 percent vs. 69 percent).

And although younger adults are more likely than older adults to get news on social media, many older adults also now get news there as well.

In all, a remarkable 90 percent of adults age 18-34 get news on social media. Yet, that number is 82 percent for adults age 35-49, and 67 percent for adults 50-64 years old.

What's more, fully 50 percent of adults age 65 and older told us they are now getting news on social media. And among this oldest cohort, those who pay for news are notably more likely to get news from social media (55 percent) than those who do not pay for news (36 percent).

## SECTION VII

### HOW DO YOUNGER NEWS PAYERS DIFFER FROM OLDER NEWS PAYERS?

In the end, the future of the news industry hangs on whether younger audiences engage with news strongly and if the group often called Millennials is willing to pay for the news directly.

What does the survey indicate about that? To know, we need to take a deeper look at the attitudes of the youngest adult cohort in the sample, adults 18 to 34 years old, and compare their attitudes to their elders. One challenge, whenever doing this, is trying to assess which attitudes have to do with age (and may change with time) and which attitudes have to do with growing up as the first digitally native generation and may not change with time.

### YOUNGER PAYERS' GENERAL NEWS HABITS

In the past, the Media Insight Project has found that some of the stereotypes of younger adults as disconnected and even a “newless” generation are false. Our past work found that Millennials are often heavy news consumers, but they do a lot of it in platforms, such as Facebook, that earlier researchers did not yet recognize as news environments.<sup>6</sup> What did we find when we looked more deeply at the question of age and paying for news?

Our findings here, as in some past work, show that a majority of younger adult and midlife news payers still consume news several times a day. But for all that, they still do it less often than the oldest Americans.

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<sup>6</sup> <http://mediainsight.org/Pages/how-millennials-get-news-inside-the-habits-of-americas-first-digital-generation.aspx>



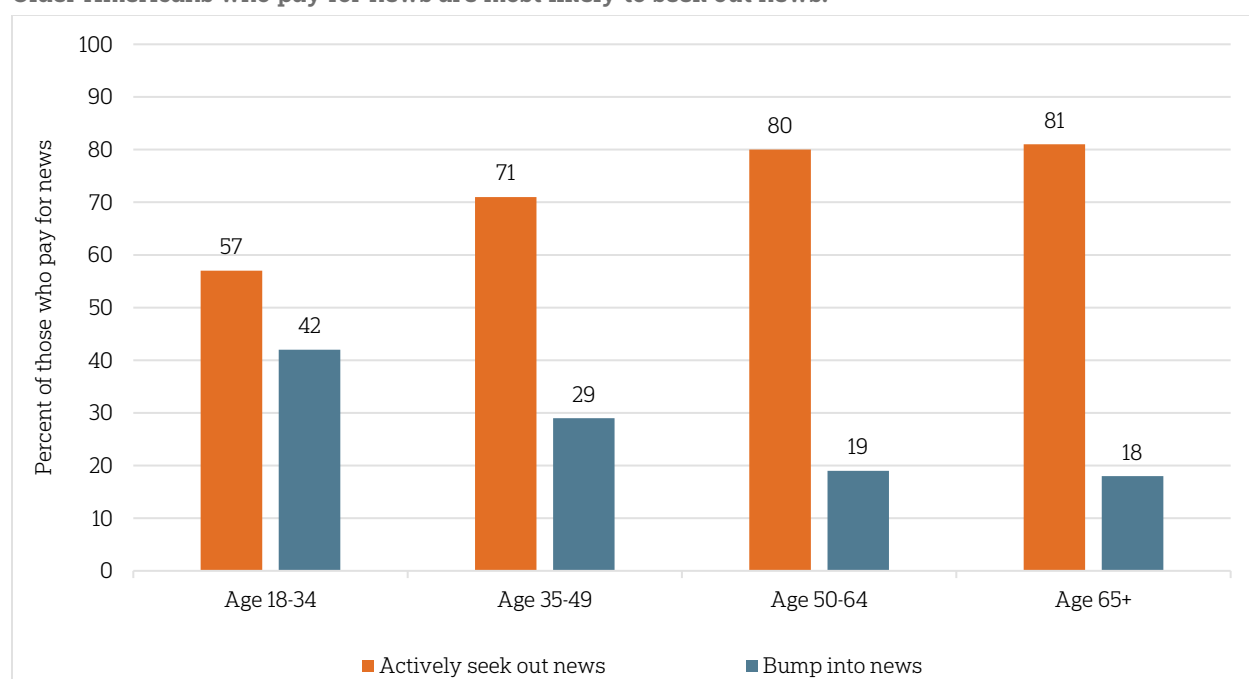
Among payers, 70 percent of those age 18 to 34 consume news multiple times a day compared with 73 percent of those age 35 to 49, but both of those numbers are lower than among those who are older. Here, fully 79 percent of those age 50 to 64 and 84 percent of those 65 and older say they consume news multiple times a day.

Though they consume news frequently, younger payers take a more moderate view of the importance of keeping up with news than their more enthusiastic older counterparts. About 48 percent of those age 18 to 34 say keeping up with the news is very or extremely important to them, but that number is 71 percent among those age 65 or over.

What about our dividing line between “news seekers” versus “news bumpers” that we think is such a key indicator of whether someone may pay for news—even if they do not pay right now?

The news here is promising for publishers. Among Millennials, about 6 in 10 subscribers are seekers and 4 in 10 are bumpers. That means, first, there are more seekers than bumpers out there to potentially identify and engage with among the youngest audience cohort. It also means that publishers are getting paid even by a sizable number of people who are generally more passive in their news consumption, especially among younger payers.

#### Older Americans who pay for news are most likely to seek out news.



Question: Choose the statement that best describes you, even if it is not exactly right. In general...I actively seek out news and information...I mostly bump into news and information as I do other things or hear about them from others.

## **OLDER PAYERS FOLLOW DIFFERENT TOPICS THAN THE YOUNGEST PAYERS**

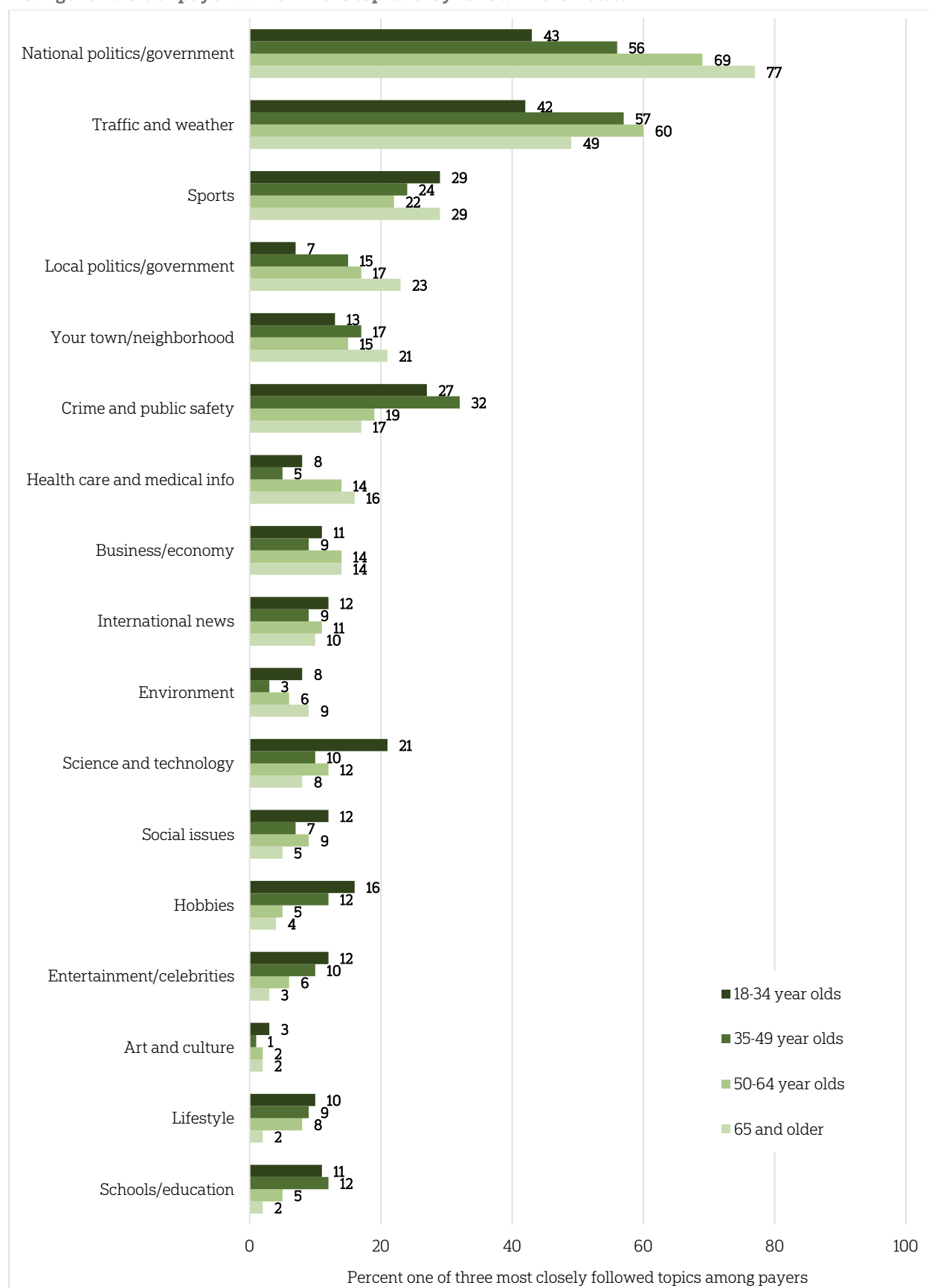
The findings also show that younger and older audiences follow different topics, even if they are both subscribers.

Some topics are universal. Subscribers of different ages are equally likely to closely follow sports, news about one's town or neighborhood, business and international news, news about the environment, and arts and cultures.

But there are other topics where subscribers divide by age. Younger subscribers, for instance, are more interested than older payers in news about science and technology, hobbies, and schools. All except payers age 65 and older follow lifestyle and celebrity news. And the youngest adults age 18-34 are more likely to follow news about social issues like abortion or race and gay rights than are the oldest payers.

By contrast, subscribers 50 and older are more interested in national politics and government (8 in 10 say it is a news topic they follow closely), local politics and government, and health and medical news.

## Younger and older payers differ in the topics they follow in the news.



Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely? Select up to three of the following.

## AGE AND PREFERRED NEWS PLATFORM – SOCIAL IS INEVITABLE

How does age influence where people get their news? Here there are some predictable but critical differences that publishers must pay close attention to if they want to engage successfully with audiences in the future. Their livelihood, indeed, may depend on it.

To begin with, social platforms are simply inevitable now as a strategy for the future—and those social platforms may be different in a few years. The largest, such as Facebook, are constantly evolving. Others, such as Reddit or Instagram, may be much bigger for younger audiences than publishers imagine. Instagram is already as or more important than Twitter as a news platform for younger audiences. YouTube is a major player for video—and Facebook is trying to compete more there as well.

Many younger adults—both those who pay for news and those who don’t—get their news from all these social media platforms.

What separates young payers from older payers is the frequency with which they get news from their social platforms.

Two-thirds of payers under 50 say they watch, read, hear, or see news on Facebook at least several times a day—or more. Barely half of all payers 50 and older say they check Facebook that frequently.

While there are not differences related to age when it comes to use of Twitter, Reddit, and Snapchat, 18-34 year-old payers are much more likely than their elders to say they get news on YouTube several times a day or more often. Nearly 4 in 10 of those age 18-34 report such frequent use of YouTube for news compared to 2 in 10 of those age 35-49 and 1 in 10 news payers 50 and over.

Unlike their paying counterparts, nonpayers do not show any variation by age in frequency of getting news from social media when controlling for other demographic factors.

We see similar age divides among payers over the devices they use to get news—with older adults more focused on TV and print publications as sources and younger adults more focused on mobile phones.

## REASONS FOR GETTING NEWS DIFFER BY AGE, EVEN AMONG PAYERS

Do younger adults who pay for news have different reasons for getting news than older adults? If so, how would that influence the way publishers should cover and present news to those audiences?

Across all age groups, two reasons stand out for why people say they get news in the first place.

First, they feel the news helps them stay informed to be a better citizen.

Second, they get news because a news source is particularly good at covering an issue or topic they care about.

More than half of all paying age cohorts cite these two reasons.

And about 4 in 10 of every age group also say that they use news because it helps them decide where they stand on things and it helps them care for themselves and their families.

For the youngest adults, however, the priorities change a little once you move beyond these top factors for getting news, which again are remaining informed and finding a source that excels at topics they care about. For the youngest adults, the third most important reason for using news is that it helps people talk to friends, family, and colleagues about what is going on in the news. In other words, news as social flow is a more important element for younger adults.

And for younger news consumers who pay for news—everyone under age 50—news that helps them identify things to do and places to go is registers as more important than it does for older consumers. Nonpayers under age 50 are also more likely to say it's very or extremely important that news helps them find places to go and things to do. But nonpayers do not vary by age in the other reasons they give for following news.

#### Payers' reasons for following news, by age

	Top-ranked reason	Second-ranked reason	Third-ranked reason
Age 18-34	Helps stay informed (55%)	Good at covering issue (52%)	Helps talk to others about news (50%)
Age 35-49	Helps stay informed (64%)	Good at covering issue (60%)	Helps care for self/family (48%)
Age 50-64	Helps stay informed (65%)	Good at covering issue (61%)	(TIE) Helps care for self/family; Helps decide where stand on things (46%)
Age 65 and older	Helps stay informed (65%)	Good at covering issue (62%)	(TIE) Helps care for self/family; Helps decide where stand on things (44%)

Question: People use news for many reasons. When it comes to the biggest reasons you use news, how important to you is it that it...?

## THE PATH TO SUBSCRIPTION FOR YOUNG PAYERS

The previous section addressed the ways in which payers' motivations for getting news differ across generations. This section now turns to age differences among payers in the reasons they give for subscribing to a specific source that they pay for. Among news payers, the top three reasons for subscribing to a source are similar across age groups.

#### Top reasons leading people to subscribe, by age

	Top-ranked reason	Second-ranked reason	Third-ranked reason
Age 18-34	Friends or family use it (45%)	Looking for a news source that covers a topic (44%)	Discount or promotion (35%)
Age 35-49	Looking for a news source that covers a topic (46%)	Discount or promotion (40%)	Friends or family use it (38%)
Age 50-64	Looking for a news source that covers a topic (45%)	Friends or family use it (41%)	Discount or promotion (36%)
Age 65 and older	Friends or family use it (40%)	Looking for a news source that covers a topic (37%)	Discount or promotion (36%)

Question: What factors helped lead you to start paying for [PAID SOURCE]?

Two reasons do show differences by age, however. Younger people age 18-34 (24 percent) and age 35-49 (17 percent) are more likely than older folks age 50-64 (7 percent) and age 65 and older (8 percent) to say they noticed it on social media, suggesting publishers looking to attract young people to pay should target social media.

And, those age 65 and older (33 percent) and those age 18-34 (24 percent) are more likely than those age 50-64 (14 percent) to say their personal situation changed, allowing them more time to use paid content. This suggests life changes very early and very late in adulthood make it more feasible for them to pay for news.

## **YOUNGER PAYERS DERIVE VALUE FROM SUPPORTING JOURNALISM**

Looking beyond the reasons why people subscribe, what value do they see or appreciate in a publication after they subscribe?

We see few differences here in benefits people say they receive from their paid news sources by age. But, younger people age 18 to 34 (34 percent) and age 35 to 49 (39 percent) are more likely than those age 50 to 64 (24 percent) and age 65 and older (25 percent) to say they feel good about contributing to a news organization. On the other hand, those age 50 to 64 (20 percent) and those age 65 and older (22 percent) are more likely to say they benefit from getting access to events sponsored by the organization than those age 35 to 49 (9 percent), with those age 18-34 in the middle (16 percent).

## **DIFFERENCES BY AGE EMERGE IN WHO DOESN'T PAY FOR NEWS.**

Finally, what difference does age make among those who don't pay for news?

For many years publishers—and particularly newspaper publishers—operated on the assumption borne out over time in the pre-digital age that people would age into becoming subscribers. As they bought houses, had children, and entered the school system and other aspects of civic life, they would naturally become more engaged with the community and turn to civic news.

Is that still true?

The survey finds that there are some differences between younger and older news consumers who do not pay. As noted elsewhere, there are in many ways two types of nonpayers (active and passive news seekers), but there are also signals here that some younger nonpayers may be difficult to convert as long as so much online information is freely available.

Younger nonpayers consume less news, put less importance on keeping up with it, and are less likely to actively seek it out, instead saying they bump into it a high rate. And, as stated previously in this report, while they cite similar top reasons for not paying for news as do older nonpayers, they are more likely to lack enough interest to pay for news and to say they are too busy to use it. They are also more likely to use news to find things to do and places to go.

## **YOUNGER NONPAYERS VALUE NEWS LESS AND GET LESS OF IT**

In aggregate, younger nonpayers don't consume as much news and do not think that keeping up with news is as important as do their older counterparts. Younger nonpayers consume news less often than older nonpayers. Among nonpayers, the youngest group age 18-34 are also more than twice as likely as all older nonpayers to simply not consume news very often. Indeed, 20 percent of younger nonpayers

say they consume news once a week or less often, that is, twice as many as nonpayers who are age 35 to 64 and four times as many as nonpayers 65 and older. The youngest nonpayers age 18 to 34 are also the least likely to believe that keeping up with the news is important. Just a quarter (26 percent) of the youngest group of nonpayers believe that keeping up with the news is very important while more than 4 in 10 of the older nonpayers say the same.

All of this suggests that some of these younger nonpayers may become payers as they age and some will not, just as was true of consumers in the pre-digital age.

One other piece of evidence here is our breakdown of those who actively seek out news versus those who bump into it. Seekers in general look and behave a lot like news subscribers—whether they have begun paying for news or not. But, younger Americans age 18-34 are more likely than any older age groups to say they only bump into news rather than seek it out (6 in 10 vs. about 4 in 10). But the differences between young payers and nonpayers is in degree—even more young adult nonpayers (62 percent) say they bump into news compared with 42 percent of young payers.

## SECTION VIII

### PRICE AND PAYING FOR NEWS

If subscriptions are going to play a bigger role in the future of journalism, then another area of growing importance is pricing. How sensitive are people to the price of the news? If the price were lower, or structured differently, might more people pay? Or are those who pay for news a relatively smaller group by nature and willing to pay virtually any price for it? Is there some kind of middle ground? Or is the future to be found in passionate niches?

The survey probed deeply into the question of pricing and found that there appear to be different price points that matter to consumers. In general, those who pay now feel they are getting a relative bargain. Those who don't pay say pricing matters a lot—and they aren't willing to pay much.

One caveat, of course, about asking people about what they might do in the future is that it is hypothetical. What people say they might do is not a guarantee. Television was once largely free, and people resisted the idea of having to pay. Then they began to pay. Now there are signs that they may want to pay less.

With those caveats in mind, what did we find?

### PERCEIVED COST AND VALUE OF THE NEWS PEOPLE PAY FOR

To begin with, those who pay for news already think the amount they pay for their favorite news source is relatively low. More than half (58 percent) say the price they pay for their chosen news source is a very small cost to them, and 32 percent say it is a moderate cost. Only 7 percent say the price they pay is a significant cost to them.

Those age 65 and older are less likely than those age 64 and younger to say the cost they pay is very small for them. Those earning less than \$35,000 a year are also less likely than those earning more to say the cost is very small to them (46 percent vs. 63 percent).

The flip side of cost, of course, is value. Are people getting something good for what they are paying?

Most payers are relatively happy with the value they receive. In all, for instance, 40 percent say the source is a very good value for the price; another 43 percent say it is a fair value. Just 11 percent say the content is somewhat overvalued, and 4 percent say it is very overpriced compared to the value they receive.

Contrary to what people might expect, however, these valuations have little to do with demographics. No differences emerge here by age or income or other demographic groups. The value people put on the news they pay for is a reflection of attitude, not other attributes.

## **HYPOTHETICALLY SOME ARE WILLING TO PAY A SMALL FEE FOR FREE SOURCES THEY USE**

What about people who don't pay? Is there a chance they might? And if so, what might lead them to do so?

As we said before, assessing this can be difficult in surveys. It involves asking people about a hypothetical. But the findings suggest there is at least some sizable minority of people who do not pay for news today who might be persuadable.

Among those using a free source, most (73 percent) say they aren't likely to pay for that source in the future. But more than a quarter said they might (16 percent say they would be moderately likely and 10 percent say they would be very or extremely likely).

Some of these people using free sources include those who pay for another publication already. If those people are removed and we look only at people who pay for no news whatsoever, there is still a notable potential for increasing subscriptions. Of this group who pay for no news at all currently, 17 percent say they are likely to pay for a particular news source they now use (and roughly a fourth of those, 4 percent, say very likely). In other words, nearly 1 in 5 nonpayers say they might be willing to start paying.

Who are these potential payers? They tend to be people who we earlier identified as seekers--or who actively seek out information about topics they care about--rather than describing themselves as people who are more likely to bump into the news.

For example, during the formative interviews, Freddy, a 34-year old from Phoenix, said he would be willing to pay for soccer news in print or online because he does not see any great free source. "General news you can get anywhere...whereas soccer is different here and it's kind of hard to find," he said.

Among seekers, 29 percent say they would be moderately willing to pay. Among bumpers, the number drops to 18 percent.

Those who already pay for another source are also more likely than others to say they would be willing to pay for a source they currently get for free (32 percent) than are those who do not pay for any news (17 percent).



Would bundling—giving people access to a lot of news sources for just a bit more than the price of getting one favorite news source—help? Here the answer must be taken with a grain of salt. The bundling idea is hypothetical. Until people saw a concrete list of what they would get, it is hard to know what they would do. Bundling has proven effective for publishers like *The Washington Post* in the last couple years.<sup>7</sup>

But in this survey, the generic idea of bundling did not appear to make a big difference.

In general, again, 83 percent of nonpayers say they are not likely to pay for news no matter what while 16 percent say they might. If offered the prospect of multiple news sources in a bundle, the numbers move only slightly, with 81 percent saying they are not at all or not very likely and 19 percent saying they might (14 percent say they would be moderately likely, and 5 percent say they would be very or extremely likely to pay).

Among all news consumers, payers and nonpayers who regularly use a free source, 26 percent say they are at least moderately likely to pay for their free source of choice, with only slightly more (30 percent) saying so if additional news sources were bundled with it.

Are there differences in this by ethnicity?

Hispanics are more likely to be swayed by the inclusion of access to other news sources, with 43 percent saying they would be at least moderately likely to be willing to pay under those circumstances compared to just 29 percent of African Americans and 26 percent of whites.

Those who say keeping up with the news is very or extremely important to them are more likely than others to say they would be at least moderately likely to start paying for their free source (32 percent vs. 18 percent). But an offer of access to other content with a subscription does not change how likely either group is to pay.

## PRICE MAKES SOME DIFFERENCE

Price does, however, play a role in people's willingness to pay for a free source they currently use.

To test this, we randomly assigned each respondent to consider a specific price point. Respondents were asked whether they would pay for their current source at one of five randomly assigned prices: \$50 cents, \$1, \$3, or \$7 a week.

About 1 in 4 free users say they'd be willing to pay for the source they currently use for free if it were 50 cents or \$1 a week. That number fell to about 15 percent of free users at \$3 or \$5—but it didn't matter which price among those two.

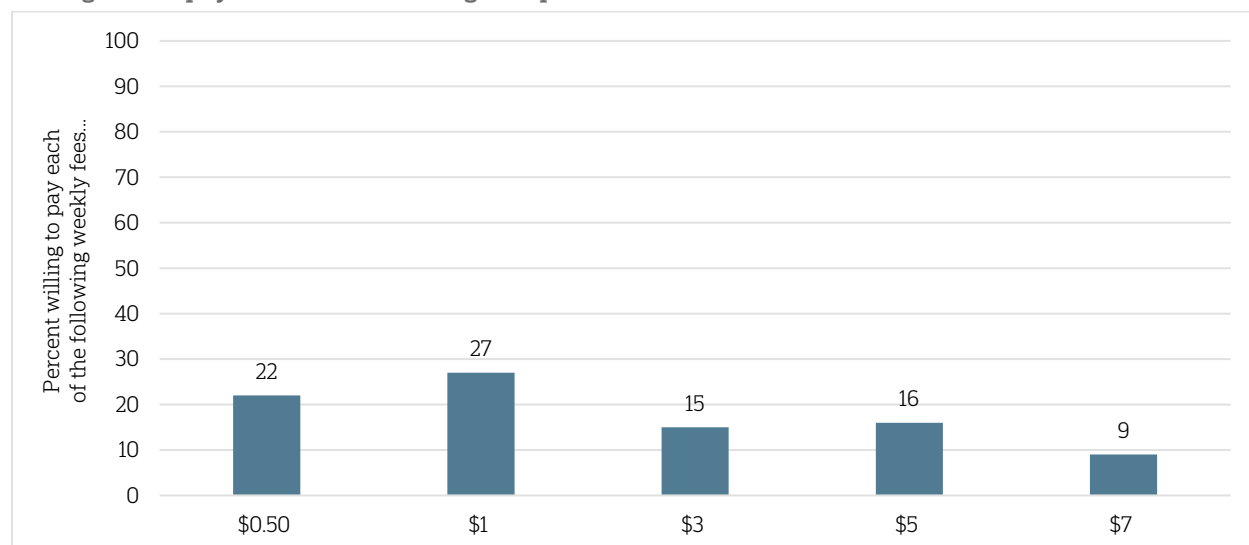
But there was a point at which the price was too high. Fewer than 1 in 10 free users would be willing to pay \$7 per week.

No differences emerge in willingness to pay by demographic group once controlling for price. But, those who say keeping up with the news is important to them are more willing to pay.

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<sup>7</sup> Kennedy, D. June 8, 2016. "The Bezos Effect: How Amazon's Founder Is Reinventing *The Washington Post*—and What Lessons It Might Hold for the Beleaguered Newspaper Business." Shorenstein Center on Media, Politics, and Public Policy. <https://shorensteincenter.org/bezos-effect-washington-post/>

Some users of free sources would be willing to pay a fee to continue getting that content, but the willingness to pay declines as the fee goes up.



Question: Suppose [FREE SOURCE] decided to charge a [INSERT FEE] weekly fee to access its news and information. Would you pay that fee to continue getting news and information from [FREE SOURCE] or would you stop getting your news and information from [FREE SOURCE]?

## ABOUT THE STUDY

### SURVEY METHODOLOGY

This survey was conducted by the Media Insight Project, an initiative of the American Press Institute (API) and The Associated Press-NORC Center for Public Affairs Research. The survey was conducted from February 16 through March 20, 2017. The survey was funded by API. Staff from API, NORC at the University of Chicago, and AP collaborated on all aspects of the study.

Data were collected using the AmeriSpeak Panel, which is NORC's probability-based panel designed to be representative of the U.S. household population. During the initial recruitment phase of the panel, randomly selected U.S. households were sampled with a known, nonzero probability of selection from the NORC National Sample Frame and then contacted by U.S. mail, email, telephone, and field interviewers (face-to-face). The panel provides sample coverage of approximately 97 percent of the U.S. household population. Those excluded from the sample include people with P.O. Box only addresses, some addresses not listed in the USPS Delivery Sequence File, and some newly constructed dwellings.

Interviews for this survey were conducted with adults age 18 and over representing the 50 states and the District of Columbia. Panel members were randomly drawn from the AmeriSpeak Panel, and 2,199 completed the survey—1,885 via the web and 314 via telephone. The sample includes 1,194 who pay for a news subscription and 1,005 who do not pay for any news. The final stage completion rate is 31.2 percent, the weighted household panel response rate is 34.4 percent, and the weighted household panel retention rate is 94.7 percent, for a cumulative response rate of 10.2 percent.

The overall margin of sampling error is +/- 2.7 percentage points at the 95 percent confidence level, including the design effect. The margin of sampling error may be higher for subgroups.

Respondents were offered a small monetary incentive (\$3) for completing the survey. All interviews were conducted in English by professional interviewers who were carefully trained on the specific survey for this study.

Once the sample was selected and fielded, and all the study data had been collected and made final, a poststratification process was used to adjust for any survey nonresponse as well as any noncoverage or under- and over-sampling resulting from the study-specific sample design. Poststratification variables included age, gender, Census region, race/ethnicity, and education. Weighting variables were obtained from the 2016 Current Population Survey. The weighted data, which reflect the U.S. population of adults age 18 and over, were used for all analyses.

All analyses were conducted using STATA (version 14), which allows for adjustment of standard errors for complex sample designs. All differences reported between subgroups of the U.S. population are at the 95 percent level of statistical significance, meaning that there is only a 5 percent (or less) probability that the observed differences could be attributed to chance variation in sampling. Additionally, bivariate differences between subgroups are only reported when they also remain robust in a multivariate model controlling for other demographic, political, and socioeconomic covariates. A comprehensive listing of all study questions, complete with tabulations of top-level results for each question, is available on the Media Insight Project's website: [www.mediainsight.org](http://www.mediainsight.org).

## QUALITATIVE RESEARCH

Qualitative research was conducted through collaboration between staff from The Associated Press-NORC Center for Public Affairs Research and the American Press Institute (API).

In January 2017, the AP-NORC Center and API conducted hour-long interviews in Chicago, IL, Birmingham, AL, and Phoenix, AZ, to explore how people across the country consume news, the sources they use, and the factors that influence whether or not they will pay for news content. No more than two participants were interviewed at a time. Eight participants were interviewed in Chicago, eight were interviewed in Phoenix, and six were interviewed in Birmingham. Participants were screened based on age, gender, employment status, income, education, race, ethnicity, and news consumption habits to include a variety of perspectives.

Participants recruited based on the criteria above received \$100 for completing the interview. They were also provided an additional \$10 for bringing along a friend or family member for the interview. The friend or family member also received \$100 for participating.

## CONTRIBUTING RESEARCHERS

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## ABOUT THE MEDIA INSIGHT PROJECT

The Media Insight Project is a collaboration of the American Press Institute (API) and The AP-NORC Center for Public Affairs Research with the objective of conducting high-quality, innovative research meant to inform the news industry and the public about various important issues facing journalism and the news business. The Media Insight Project brings together the expertise of both organizations and their respective partners, and involves collaborations among key staff at API, NORC at the University of Chicago, and The Associated Press.

## ABOUT THE AMERICAN PRESS INSTITUTE

The American Press Institute (API) conducts research and training, convenes thought leaders, and creates tools to help chart a path ahead for journalism in the 21st century. API is an educational nonadvocacy 501(c)3 nonprofit organization affiliated with the Newspaper Association of America. It aims to help the news media—especially local publishers and newspaper media—advance in the digital age.

## ABOUT THE ASSOCIATED PRESS-NORC CENTER FOR PUBLIC AFFAIRS RESEARCH

The AP-NORC Center for Public Affairs Research taps into the power of social science research and the highest-quality journalism to bring key information to people across the nation and throughout the world.

The Associated Press (AP) is the world's essential news organization, bringing fast, unbiased news to all media platforms and formats.

NORC at the University of Chicago is one of the oldest and most respected, independent research institutions in the world.

The two organizations have established The AP-NORC Center for Public Affairs Research to conduct, analyze, and distribute social science research in the public interest on newsworthy topics, and to use the power of journalism to tell the stories that research reveals.

The founding principles of The AP-NORC Center include a mandate to preserve carefully and protect the scientific integrity and objectivity of NORC and the journalistic independence of AP. All work conducted by the Center conforms to the highest levels of scientific integrity to prevent any real or perceived bias in the research. All of the work of the Center is subject to review by its advisory committee to help ensure it meets these standards. The Center will publicize the results of all studies and make all datasets and study documentation available to scholars and the public.