



Paths to Subscription: Why Recent Subscribers Chose to Pay for News

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FOR FURTHER INFORMATION ON THIS REPORT:

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OVERVIEW

Funding for the news industry is going through an epochal change, the implications of which cannot be overstated. In the future, virtually all signals suggest less of the revenue will come from advertising and more from consumers paying for news.

The move toward subscriptions will require measuring audiences differently, with analytics that measure deep engagement and not just page views. Publishers will need to segment audiences by their loyalty also and by their eventual likelihood to pay. Perhaps most significantly, the newsroom and business sides of news organizations will be aligned more than before. The move toward subscriptions places the newsroom—and quality content worth paying for—at the center of the business strategy.

To help understand this new landscape, the Media Insight Project, a collaboration of the American Press Institute and The Associated Press-NORC Center for Public Affairs Research, has conducted a series of studies over the last 18 months to understand what moves readers to subscribe.

This latest study may be the largest study ever undertaken of people who have recently subscribed to newspapers. It surveyed people who subscribed in the last three months to 90 local newspapers across the country. The survey of more than 4,100 recent newspaper subscribers captures their motives and mindsets at the time of the decision. The sample was large enough to see differences among large papers and small, reader preferences for digital consumption versus print, Democrats versus Republicans, and a host of other factors.

In this report, we identify nine distinct “paths to subscriptions” –the motives and conditions that together lead a person to subscribe. Some people are looking for coverage of a particular passion topic. Others have subscribed because of a change in their lifestyle. Some want coupons to save them money. Some discovered the paper through social media. Others want to support journalism as an institution. All are subscribers.

VARIOUS BACKGROUND FACTORS ARE PRECONDITIONS TO SUBSCRIBE
60% WANT ACCESS TO LOCAL NEWS
40% NOTICE A LOT OF INTERESTING, USEFUL ARTICLES
31% WANT TO SUPPORT LOCAL JOURNALISM
BUT ONE FACTOR STANDS OUT AS A COMMON FINAL TRIGGER
45% FINALLY SUBSCRIBED BECAUSE OF A PROMOTION OR FREE TRIAL
THOSE WHO USE A PAPER BEFORE SUBSCRIBING DO SO FOR A LONG TIME
74% WHO ENGAGED PRIOR TO PAYING USED IT FOR AT LEAST A FEW MONTHS
AFTER SUBSCRIBING, QUALITY FACTORS MATTER FOR RETENTION
78% VALUE GETTING RELIABLE, ACCURATE FACTS
68% VALUE PAPER DEALING FAIRLY WITH ALL SIDES
29% VALUE PAPER SAVING THEM MONEY
PEOPLE USE PAPERS MANY WAYS AFTER SUBSCRIBING
52% USE COUPONS
43% REGULARLY SHARE THE PAPER'S CONTENT
18% SUBSCRIBE TO SPECIALIZED EMAIL NEWSLETTERS

The findings reveal opportunities for publishers and also challenges: To understand the paths to subscription and help each reader along his or her journey, to deliver the types of value and engagement that each group desires, to tailor marketing tactics to each group, and to use this framework as a foundation for their own audience research.

Among the study's findings:

- **Quality and accuracy matter to nearly every subscriber group, especially *after* they subscribe.** When asked for the most important reasons they use the newspaper, now that they subscribe, people are most likely to cite a publication's accuracy (78 percent), its willingness to admit mistakes (69 percent), and its dealing fairly with all sides (68 percent) as most important.
- **The findings offer an opportunity and also a warning for publishers.** They suggest that cutting back on newsrooms now (as many publishers do to maintain profit margins against declining revenue) imperils any long-term subscription strategy. Publishers may have to accept a smaller, or in some cases no, margin of profit now to invest in the content quality that potential subscribers demand.
- **Regardless of their underlying motivations, many subscribers are triggered by discounts at just the right time.** Nearly half of all recent subscribers (45 percent) cited pricing promotions as the immediate trigger, more than double any other factor.
- **Market size matters.** There are some important differences between what drives people at small or medium-sized papers and metros (large and small). New subscribers to small papers are more likely than those at large metros to prefer print over digital (85 percent vs. 56 percent) and to subscribe after moving to town (23 percent vs. 13 percent). Subscribers to large metros are more likely than those at small papers to subscribe after noticing a lot of interesting articles (45 percent vs. 30 percent).
- **Print and digital subscribers are different.** Digital subscribers in this study tend to be younger, male, and more educated than print readers. Digital readers are more often attracted by good coverage of a particular topic than are print readers (38 percent vs. 25 percent), and by noticing especially useful or interesting content (47 percent vs. 36 percent). Half of digital subscribers are triggered to subscribe by hitting a paywall meter, and they are more likely than print readers to be motivated by a desire to support local journalism (38 percent vs. 29 percent).

Some factors that drive people to subscribe sit in the “background.” They are preconditions that will lead to subscribing eventually, elements such as the degree of interest in news, having noticed a lot of interesting articles, or being worried about the accuracy of other news sources in the community.

Other factors are specific “triggers” that cause someone to finally subscribe. These may or may not be directly related to the background factors. But for different subgroups, these different trigger factors can be far more or less important. For example, among print-focused subscribers, coupons triggered 26 percent, and among digital subscribers, a paywall meter triggered 47 percent.

When asked to volunteer in their own words why they decided to subscribe to a newspaper, the answers echoed the sense that a complex blend of factors are at play. The biggest factor that people mentioned in their own words was a desire to be connected to community.

Top reasons for describing why they chose to subscribe, in their own words.

Why they subscribed...	Percent
Access to local news	30
Convenience of print/home delivery	15
Promotion/discount	12
Topical focus	12
Trust/quality	9

Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]? [Open-ended; coded up to three responses]

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Combined, all these different findings suggest that publishers need to understand audiences at a much deeper level than they did when the model was maximizing the number of people who encountered the product in order to maximize advertising.

To conduct this survey, we partnered with 90 different newspapers across the country from 12 different newspaper companies. The publishers ranged from some of the largest newspaper chains in the country to smaller companies with a single paper. Each publisher provided contact information for all people who began subscribing to their papers between August 1 and October 31, 2017. All recent subscribers with a valid email address received an email invitation to complete the survey online, and 4,113 completed the survey between November 9 and December 13, 2017. We used the email addresses only for the purpose of this study, and we made sure to protect the confidentiality of all potential respondents.

This convenience sample includes many recent newspaper subscribers from various size papers across the country; however, the findings of the study might not apply to all subscribers or newspapers. The newspapers that participated in the study could be different in some ways from newspapers that did not, and people who completed the interview could be different in some ways than those who declined to respond. Appendix 1 provides a more detailed look at the demographics and news behavior of the respondents.

The sections that follow will explore some themes in detail. First we examine what makes people willing to subscribe, what triggers their conversions, and what happens immediately after subscribing. Then we break down differences between print and digital readers, young and old, big and small markets, Republicans and Democrats. Finally, we dive deep into publisher strategies for each of the nine different paths to subscription.

SECTION 1

WHAT GETS PEOPLE READY TO PAY AND WHAT CONVERTS THEM?

The consumer’s journey toward subscribing begins with engagement.

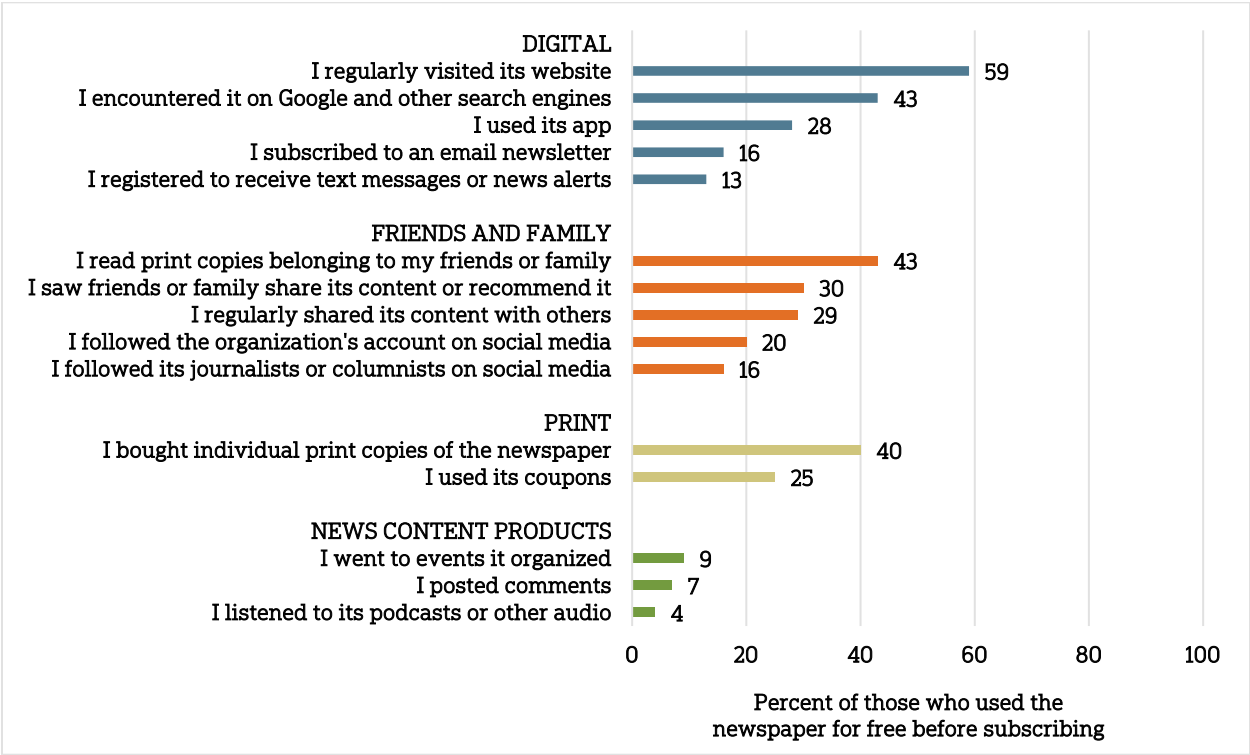
How did the recent subscribers we studied engage with their newspaper before deciding to pay? The answers point to important and specific tasks for publications to reach future subscribers.

Publishers must optimize content to be found in search engines. They also must have a robust social strategy—for these casual encounters through social platforms lead to subscribers in bigger numbers than publishers may believe. Having a well-designed and constantly updated website is vital—not just for younger subscribers who form the future of a publication’s base. The data also make it abundantly clear that it is important to make a publication accessible to friends and family of current readers, perhaps through family packages.

Almost all of these practices are even more important to reach younger future subscribers. There will be more on this in the section exploring age-related differences among recent subscribers.

People interacted with a newspaper or its journalists in many ways before subscribing. About 1 in 3 respondents report they used the newspaper before subscribing, and among those 1,371 subscribers, the most common uses were regular website visits, followed by finding it in search, noticing friends and family using it, and buying individual copies.

How people encountered the paper before subscribing.



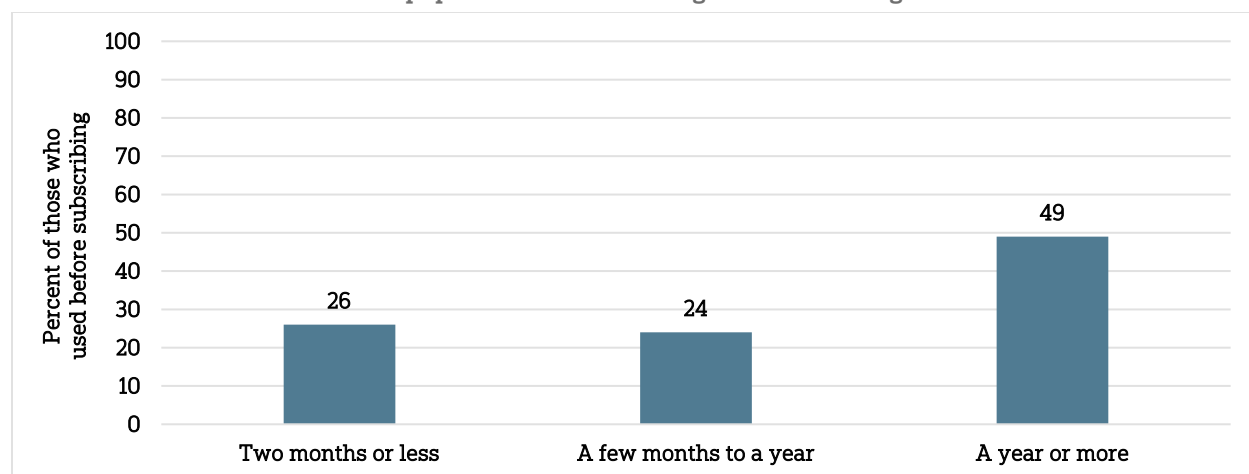
Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

The data also show that this engagement builds and unfolds over time. News publishers should expect readers to follow a relatively slow, meandering path toward subscribing.

Most new subscribers who used the publication before subscribing, 74 percent, say they were doing so for several months or more, including 49 percent who used it for a year or more before making the decision to pay.

Most of those who used the newspaper before subscribing did so for a long time.



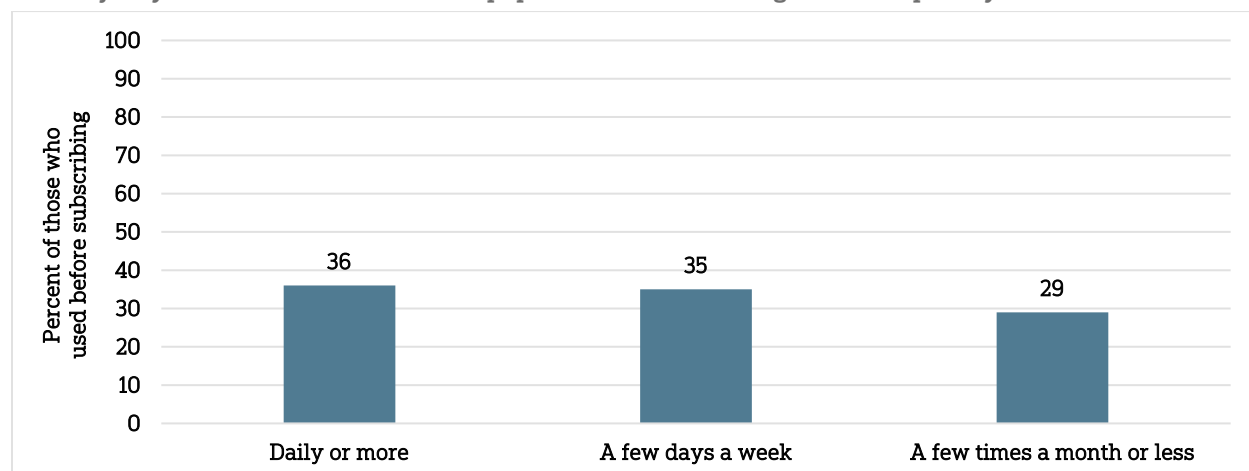
Question: How long were you getting news from [NAME OF NEWSPAPER] before you decided to subscribe?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

And frequency of contact seemed to matter. It was valuable for a publication to be part of someone's life for free on a regular basis. Of those who used the publication before subscribing, more than a third (36 percent) say they were using the publication either in print or digitally for free at least daily before subscribing. Another third (35 percent) say they used the newspaper a few days a week. On the other hand, just 29 percent say a few days a month or less.

Put another way, 7 out of 10 future subscribers who used the paper before subscribing say they were encountering the paper at least a few days a week before paying for it.

The majority of those who use the newspaper before subscribing did so frequently.



Question: How often were you getting news from [NAME OF NEWSPAPER] before you decided to subscribe?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

BACKGROUND FACTORS RELATED TO THE PUBLICATION AND THE CONSUMER ARE IMPORTANT TO GETTING PEOPLE READY TO SUBSCRIBE.

Beyond the engagement with the source before subscribing, there are a number of ways that future subscribers recognize how the publication is or could be valuable to them.

We call these “background factors”—elements people say led them to interact with the publication and then gradually moved them toward the decision to subscribe.

We asked people about a list of possible “background” reasons they might have had for interacting with the paper. These were derived from results of a previous survey we did in the spring of 2017.¹

Some of these background factors relate specifically to the consumer, such as their job, whether their friends or family used it, or whether they had recently moved to the area. Other background factors have more to do with factors that the publication can control, such as offering promotions or free trials or high-quality coverage of a specific topic or issue.

We find that these background motivations are a combination of factors related to the consumer and some that relate to the publication.

For instance, 60 percent of these future subscribers identify their desire to have access to news about their local community as a major factor. The second biggest background factor, significant but not cited by a majority, is that they kept noticing interesting or useful articles (40 percent). Third is that they saw promotional pricing or free trials (35 percent).

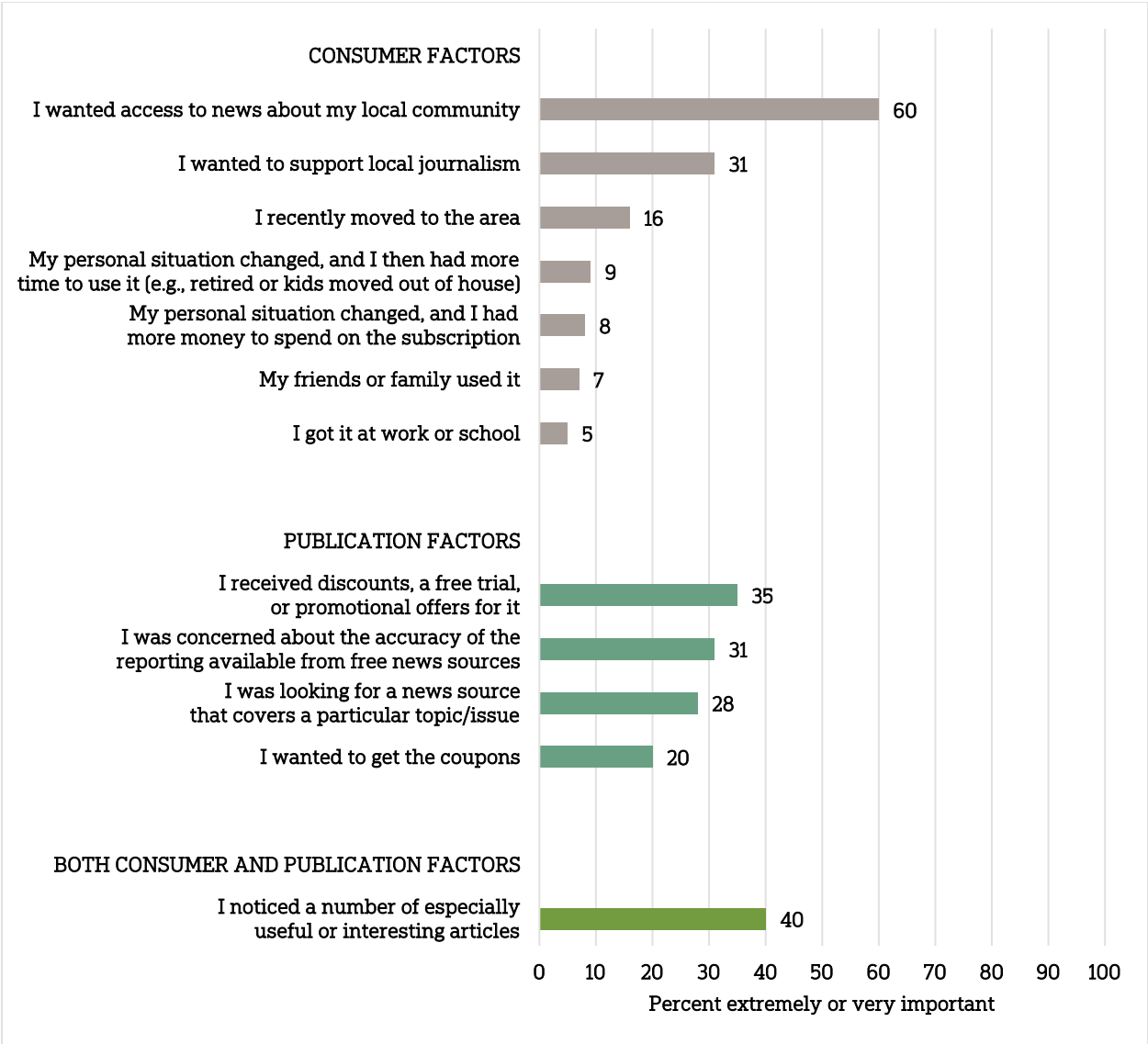
These are followed in popularity by people’s desire to support local journalism (31 percent), and that they thought the publication was more accurate and reliable than other free news sources (31 percent). Next, more than a quarter cite interest in a specific subject or beat the paper covered (28 percent).

It is interesting that the publication has influence over four of the top six most important factors leading people to consider subscribing. The publication can influence the quality and usefulness of its content, its promotional pricing and messaging, its accuracy, and the area of beat concentration.

Two of these top six factors relate to things about the consumer over which publications may not have much control—how civically minded someone is and their desire to support local journalism. The publication also can have an impact in making sure that people who don’t subscribe might see their best content, by sustaining a robust social media strategy to distribute the best stories.

¹ <http://mediainsight.org/Pages/Paying-for-News-Why-People-Subscribe-and-What-It-Says-About-the-Future-of-Journalism.aspx>

Publications influence many background factors leading people to subscribe.



Question: How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

THE CONVERSION: WHAT GETS THE CREDIT CARD OUT OF THE WALLET?

Even once a publication has news consumers who have engaged with it for months and can recognize several background factors that make them inclined to subscribe—something still has to push them over the edge.

The final decision to subscribe requires a “trigger.”

We asked in two different ways about what finally triggered subscriptions.

In one approach, we asked recent subscribers to recall what triggered their final decision to subscribe from a defined list of 11 different choices.

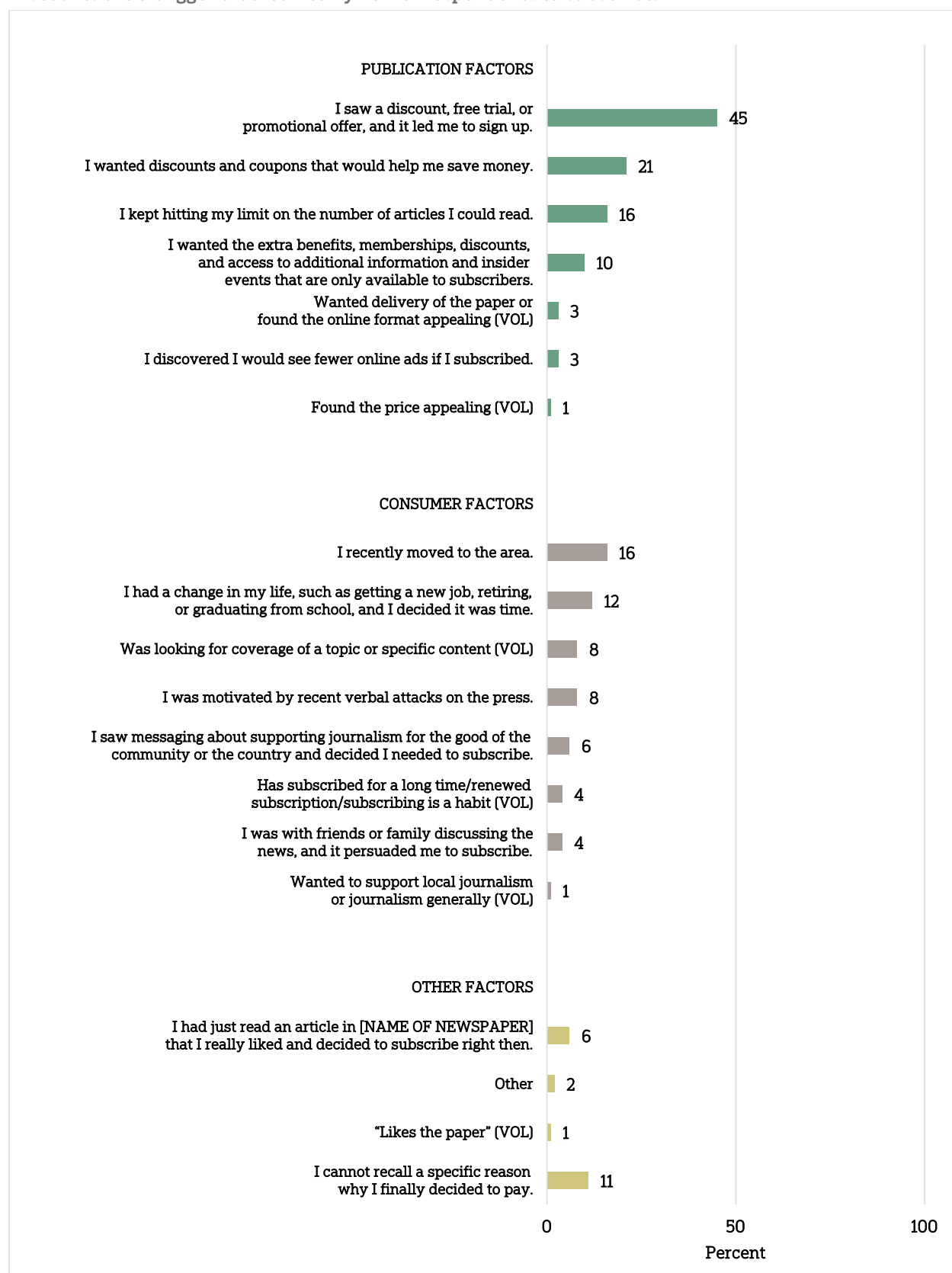
Discounted subscription pricing comes out as the most important trigger by far, with twice as many people identifying it as any other.

Nearly half of all recent subscribers cited pricing promotions (45 percent). Promotional pricing discounts are cited by more than twice as many people as a trigger—no matter their background motivations—than are any other factor.

Beyond that, about 1 in 5 (21 percent) say they wanted coupons and discounts from ads. Another 16 percent report they were motivated to subscribe after hitting the paywall. The same number say they had just moved to the area, followed by a change in lifestyle.

The chart below offers a sense of these trigger factors, as well as whether these relate to actions the publication can take or whether they are characteristics involving changes in the consumer's life—though even here a publication can work with employers or real estate companies to identify potential subscribers for outreach as they move in, are hired, or retire.

Discounts are a trigger that led nearly half of respondents to subscribe.



Question: While people may be thinking about subscribing to a news source for a while, there can be a specific moment or reason that serves as a tipping point when someone makes the decision to subscribe. Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

To get an additional perspective on what motivated subscriptions, we first asked these new subscribers to put in their own words why they decided to subscribe. They could say whatever they wanted, perhaps thinking of background factors or immediate triggers. Most people provided one main reason, but some offered up to three. We then categorized those answers to find common themes.

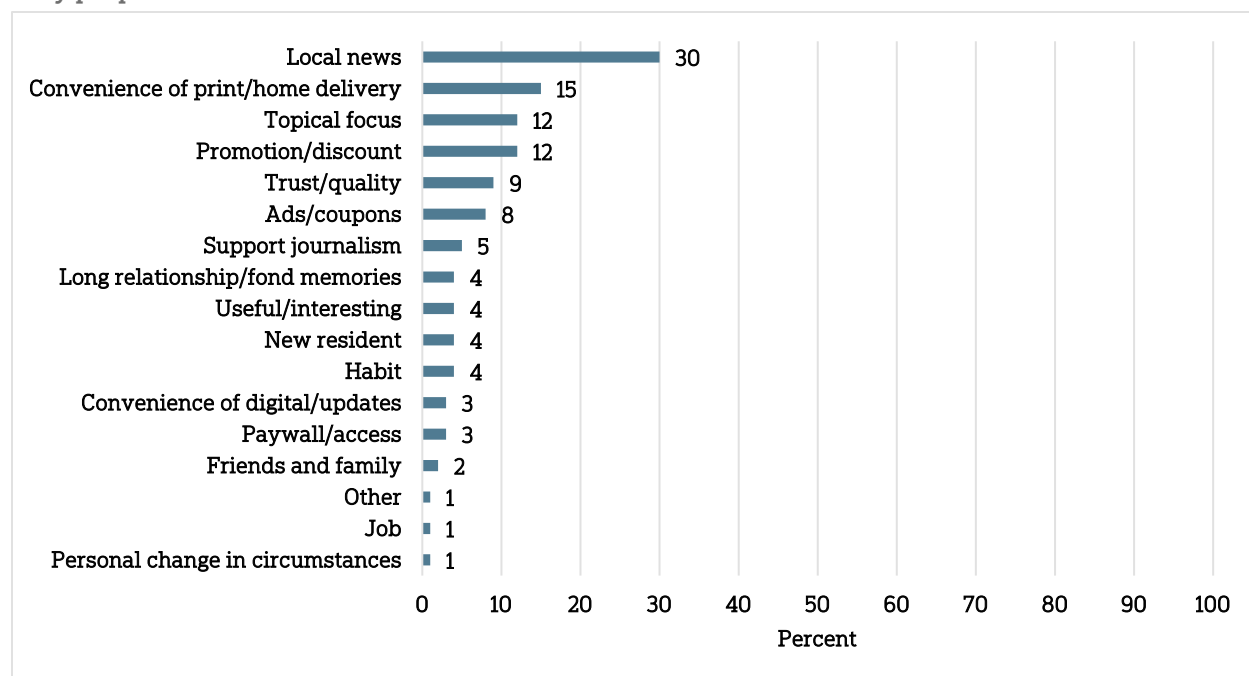
These answers show that the news content and quality of coverage is top-of-mind for new subscribers. They most often cite wanting local news coverage, with 30 percent of them reporting this without prompting. A desire for a news source that covers a particular topic or issue (12 percent) is also prevalent. In addition, about 1 in 10 say they had a desire for a trustworthy or quality publication (9 percent).

At the same time, convenience and price certainly matter. About 15 percent say the convenience of print and home delivery was important to their decision to subscribe. A similar number (12 percent) say they subscribed because of a promotion or discount on the subscription. In addition, 8 percent say they subscribed to get access to coupons, ads, or other savings.

Fewer respondents cite supporting journalism, a long relationship or fond memories of the publication, liking the news or a number of interesting articles they saw in the publication, and various other reasons. To us, that is interesting. These are new subscribers, and it is clear that there are many ways to reach out to them and persuade them that have nothing to do with a long history with the publication.

Just 3 percent mention a paywall or article limit in this open-ended question.

Why people subscribe in their own words.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]. [Open-ended response]
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

The variety of reasons respondents' express for subscribing highlights that there are many possible factors that motivate people to pay for news. Different combinations of background factors, triggers, and self-identified motives can emerge. Later in this report, we identify nine groups or paths that an individual subscriber may fall into, each leading to a distinct strategy for publishers to follow.

SECTION 2

AFTER CONVERSION: HOW DO NEWS CONSUMERS ENGAGE NOW THAT THEY ARE SUBSCRIBERS?

Once a reader has moved down the path to subscription, the journey is not over. Winning someone over to subscribe is not the end of the relationship, nor is it the beginning. It is probably better understood as the middle. (A major issue, not fully addressed in this report, is reducing friction in the sign-up page. Anecdotally, publishers have told us this is a major factor increasing subscription success.)

Once someone has subscribed, understanding how that person behaves after conversion helps to retain them. It is particularly important given that the largest trigger for new subscribers (45 percent of them) is a discount or promotion—for these people, more work remains to persuade them to continue at full price.

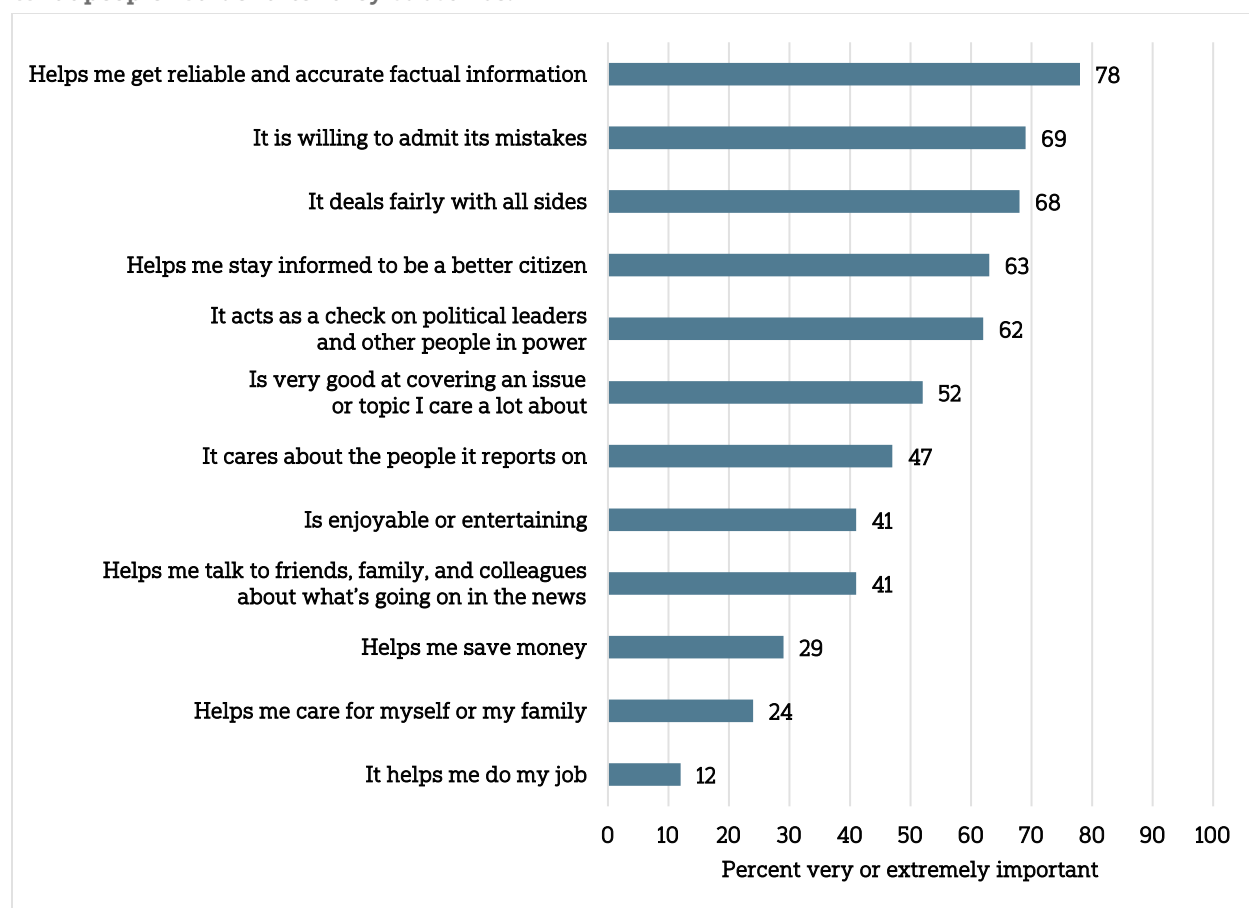
WHY PEOPLE USE THE PUBLICATION THEY JUST SUBSCRIBED TO.

We asked people, now that they had subscribed, what jobs they feel the publication is doing for them. Even when a person's triggers for subscribing were transactional (like a discount promotion), we find it significant that respondents tend to cite journalistic factors as the most-valued benefits once they are a subscriber.

At the top of the list of reasons they use the publication now, people cited the publication's accuracy (78 percent), its willingness to admit mistakes (69 percent), and its dealing fairly with all sides (68 percent).

More transactional factors, such as saving money or helping with people's work, are cited by fewer of the recent subscribers who answered the survey.

What people “value” after they subscribe.



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

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

NEW SUBSCRIBERS FOLLOW A VARIETY OF TOPICS, AND NEARLY HALF FOLLOW LOCAL POLITICS AND GOVERNMENT.

We also asked people who had subscribed what topics they tended to follow most closely in the paper. It is important to note that the answers for this varied notably by the size of the paper ([see section below](#)). So these answers are both general in nature and are limited by the nature of the sample of people willing to fill out the survey.

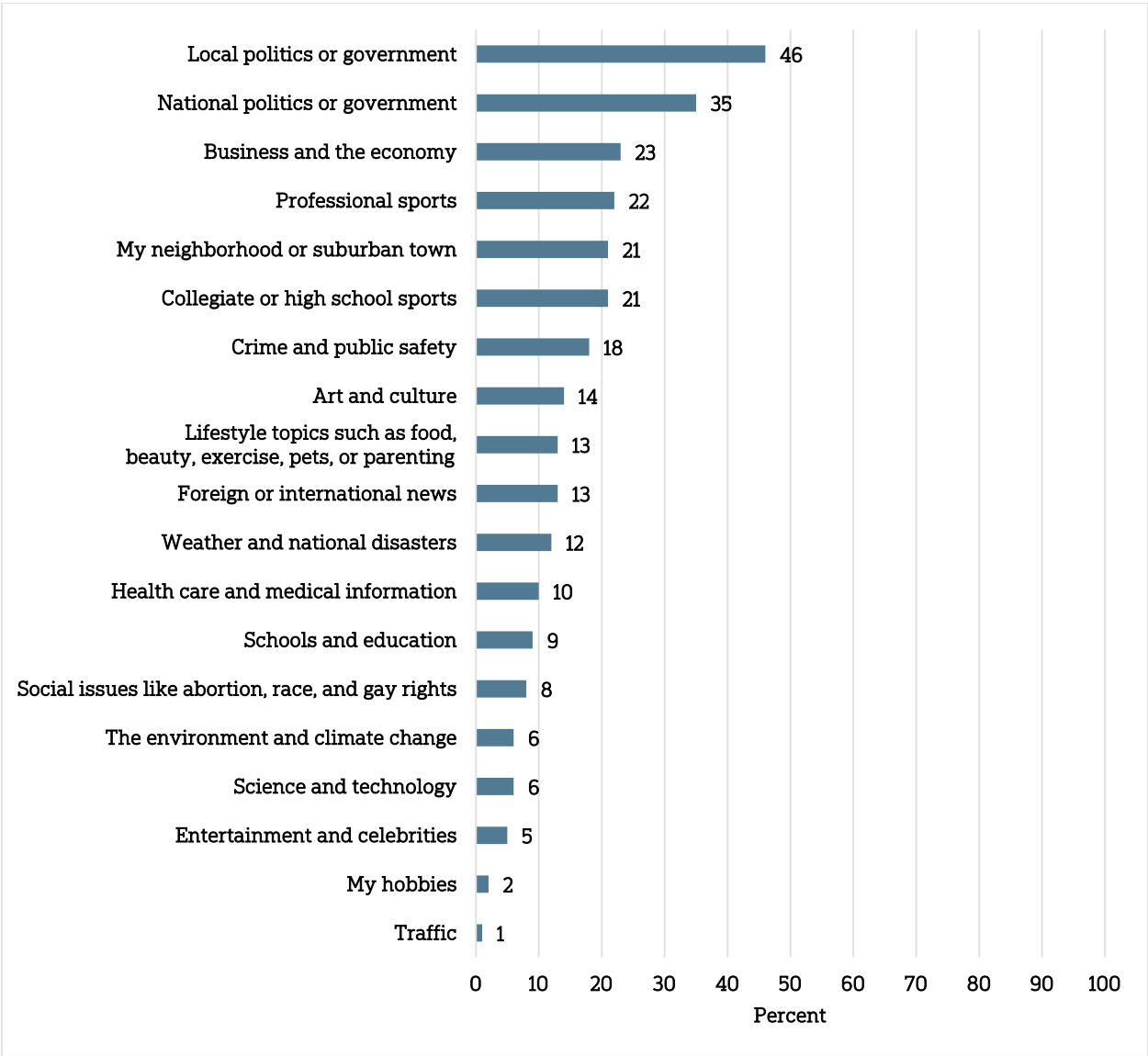
Even with those caveats, the “hard news” or civic nature of the topics is interesting. The new subscribers in our study are highly attracted to their newspaper’s coverage of local government and politics. That topic is cited as important by 46 percent, more than any other subject.

Among some of the types of new subscribers we break down later in this report, interest in local government spikes even higher.

National politics is the second most popular (35 percent), and higher still at larger publications. There is then a set of topics that each is followed by about 1 in 5 respondents: business and economics, pro sports and college sports, neighborhood news, public safety, and then lifestyle, culture, and food.

The answers are a mix, but they are strongly connected, as were the background factors for subscribing in the first place, to civic affairs and feeling connected to the local community.

Nearly half of new subscribers follow local politics or government.



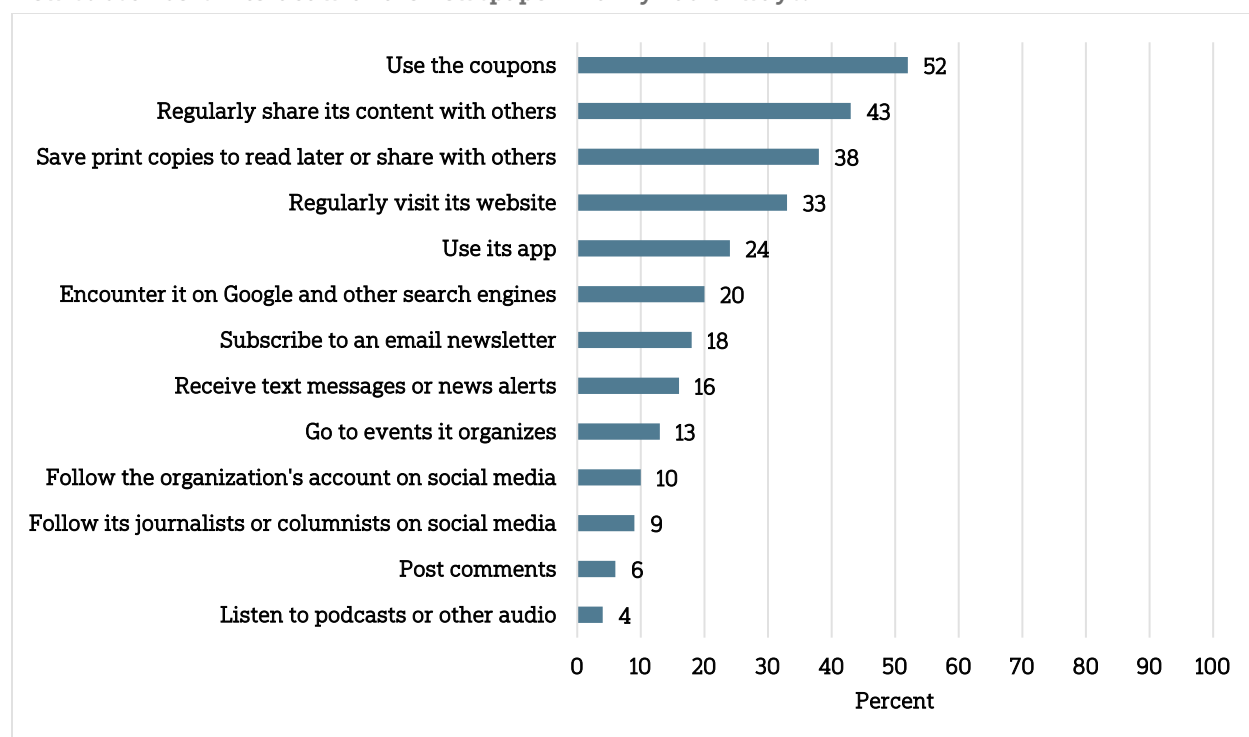
Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]? Please select up to three (3).
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PEOPLE INTERACT WITH NEWSPAPERS THEY RECENTLY SUBSCRIBED TO IN A VARIETY OF WAYS.

Beyond what they read, and perhaps most significantly for publications devising a strategy to retain customers, we also asked people how they use the paper now that they had subscribed. The range of uses is varied and suggests the myriad of ways a modern publication now can be part of readers’ lives.

Atop the list, about half say they used coupons from the print paper, while 4 in 10 report they share content with others. Later in this report we examine differences between print and digital subscribers—and there these uses will vary.

New subscribers interact with the newspaper in a myriad of ways.



Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Among those who use the source before subscribing, whether increasing from daily to more than daily, or weekly to more often, or something else, 70 percent now use the source more frequently after subscribing than they did before. But, they not only use it more frequently, they interact with it in new ways. Among those who used the source previously, their use of coupons increased by 17 percentage points after subscribing, their sharing of content increased by 16 percentage points, and their use of the app or an email newsletter increased by 13 percentage points.

All told, the findings show that most people interact with their newspaper now in more than one way, even though the population of recent subscribers who answered the survey is heavily print oriented.

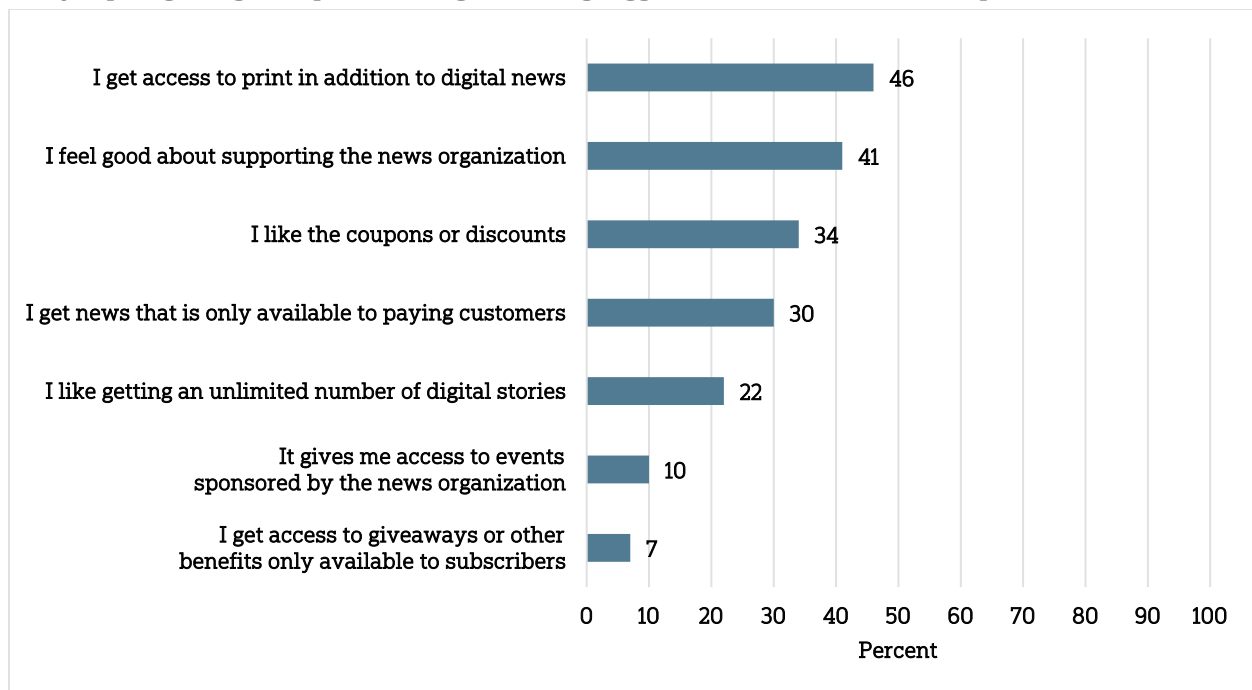
Indeed, just 18 percent say they mostly interact with the paper by only one method, while the majority (52 percent) say they regularly interact with the newspaper in at least three ways.

NEW SUBSCRIBERS CITE A NUMBER OF SUBSCRIPTION BENEFITS RANGING FROM ACCESS TO BOTH PRINT AND DIGITAL TO SUPPORTING THE NEWS ORGANIZATION.

What benefit do people think they are getting now that they have subscribed?

While many respondents might have been motivated to subscribe based on a transactional reason, such as a deal or to get discounts, the most popular subscription benefits that people cite are related to the content and for civic reasons.

The answers here are a mix for the overall population of new subscribers. Later in this report, we break down nine different paths to subscription, which offer more distinction as to when opinions differ about perceived benefits.

Many report getting both print and digital among biggest benefits of their subscription.

Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

MOST RESPONDENTS CONSIDER THEIR NEWSPAPER RELIABLE AND A GOOD VALUE.

At a time when trust in news has become a prominent topic in the national dialogue, the survey asked these new subscribers how reliable they considered the publication they had recently subscribed to.

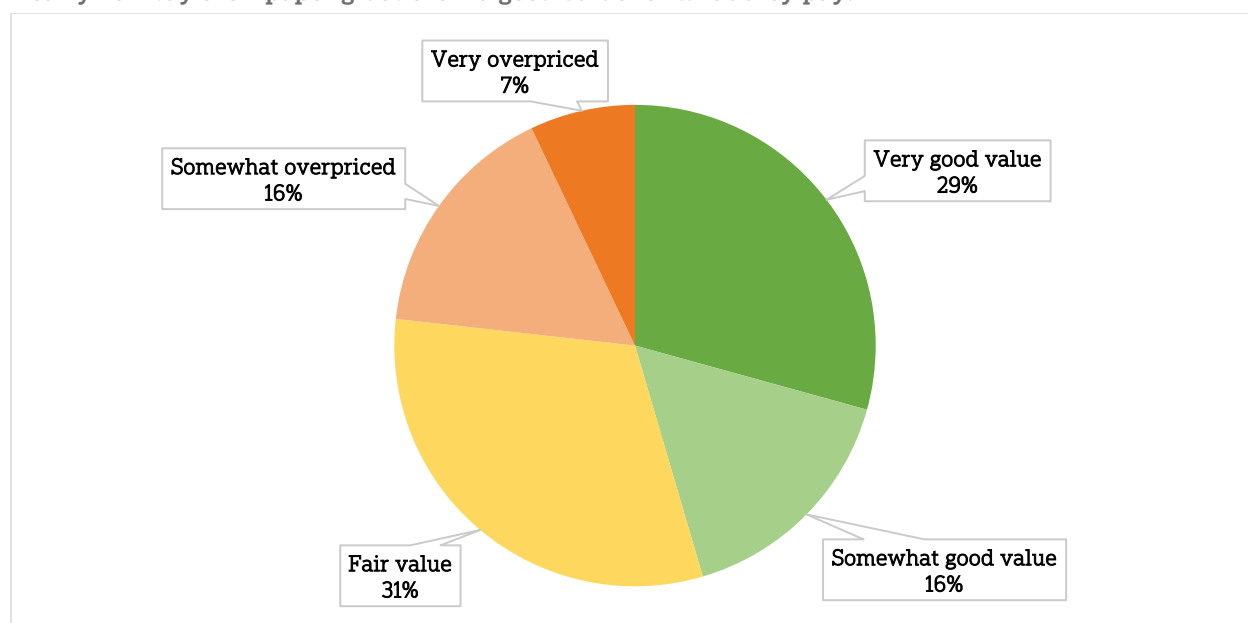
Because this sample is of new subscribers who were willing to answer a survey about their publication, the answers may be skewed toward favorable opinions. The open-ended answers to the question of why people subscribed made it clear not everyone loves their publication, but in general people give it high marks when asked about specific aspects of the publication.

Nearly two-thirds (64 percent) consider the news from their new publication completely or very reliable. A quarter (26 percent) say just moderately reliable, and only 9 percent do not view it as reliable.

Another issue, as journalism in general and the newspaper industry in particular shifts to rely on subscriptions more than advertising, is how much publications will be able to charge for subscriptions.

The findings suggest this population of new subscribers believe they are getting a good value. In all, 45 percent of these subscribers think they are getting either a very good value (29 percent) or a somewhat good value (17 percent). Another third think they are getting a fair value.

Nearly half say their paper gives them a good value for what they pay.



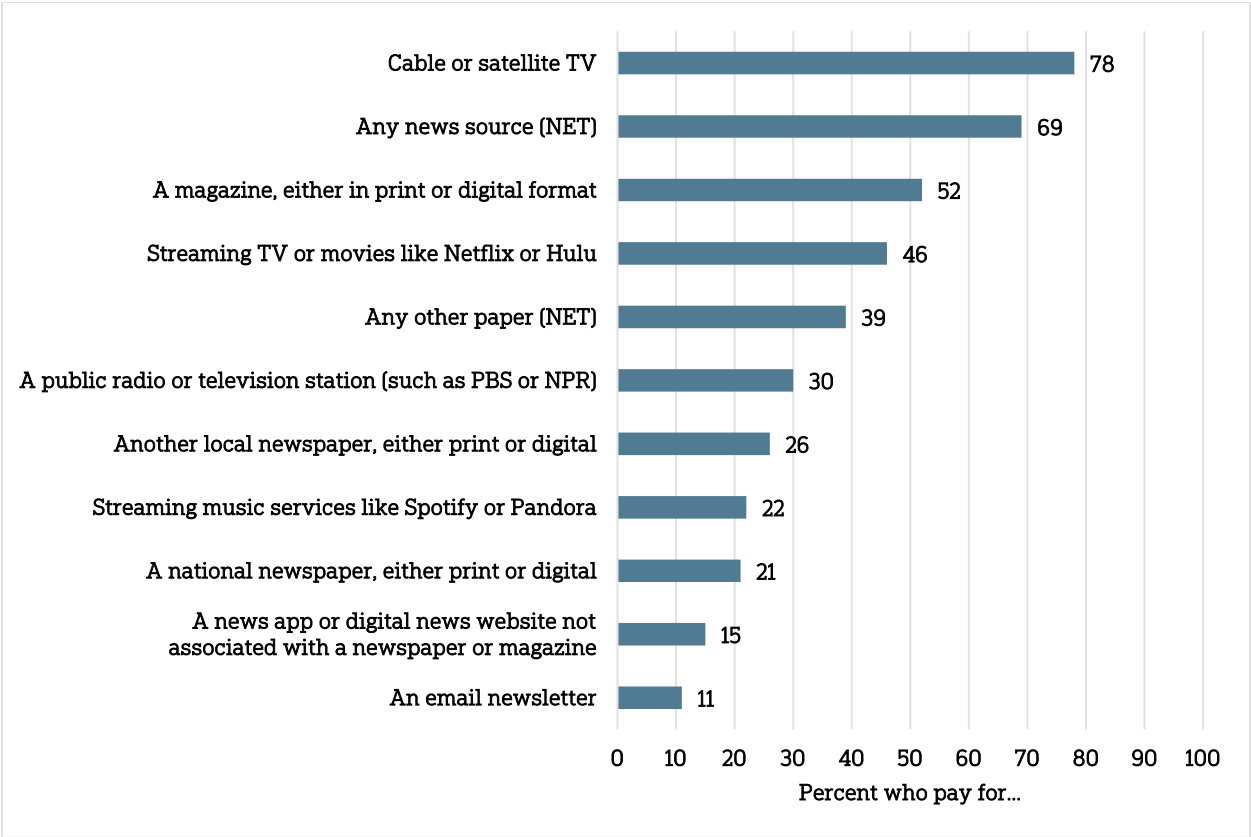
Question: Think about your satisfaction with [NAME OF NEWSPAPER] given the price you pay for it. Which statement comes closest to your opinion?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

In addition, most subscribers who filled out the survey found the sign-up process painless—65 percent describe it as very easy and 24 percent say it was somewhat easy, compared to just 8 percent who found it somewhat difficult and 3 percent who found it very difficult. Of course these data only reflect the attitudes of people who successfully completed the subscription process and then also agreed to take a survey several weeks later. It would be a mistake to consider that these numbers represent the feelings of all people who encounter a subscription page on the average newspaper website.

It is important that it is easy to subscribe and that readers feel like they are getting a good value because respondents have many other paid options in their media diet. About 4 in 10 respondents say they pay for another newspaper, and 7 in 10 report paying for some other source of news. In addition, 8 in 10 pay for cable or satellite TV.

A majority of the survey’s subscribers pay for another newspaper or news source.



Question: Next, we are interested in whether you paid to use any other media in the last year other than your subscription to [NAME OF NEWSPAPER]. 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.

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

SECTION 3

DIGITAL SUBSCRIBERS: WHAT MOTIVATES THEM AND HOW ARE THEY DIFFERENT FROM PRINT-FOCUSED READERS?

Digital subscriptions pose unique business opportunities for newspapers—they can be sold to anyone, anywhere, and have higher margins unhindered by printing or delivery costs.

Digital readers also leave a data trail of analytics and email addresses that empower a sophisticated publisher to direct marketing efforts at the best prospects.

But the digital subscriber tends to be a different kind of person motivated by different things than print readers.

In our sample, those who prefer digital tend to be younger, male, and more educated. They are more commonly found in the suburbs of large or mid-sized metro areas. Of course, digital newspaper subscribers across the country could differ in terms of demographics.

Digital readers in this study are more often attracted by good coverage of a particular topic, and half of them are triggered to subscribe by hitting a paywall meter.

Understanding these and other differences is essential to smartly targeting potential digital and print subscribers in the right ways.

In this section, we examine those differences. First, a note on how we sorted out “print” and “digital” people. Subscribers were asked whether they get print copies of papers, digital content, or both. Those who receive both were then asked which format they prefer. Those who only get print copies or get both but prefer print are classified as “print.” Those who only get digital content or get both but prefer digital are classified as “digital.”

Among the responding subscribers, 71 percent prefer or only use the print paper, and 26 percent prefer or only use digital content, while 3 percent declined to state a preference. We then can dig deeper into each of those groups to see what led them to subscribe to their newspaper and what they value about their subscription.

RESPONDENTS WHO PREFER DIGITAL TEND TO BE YOUNGER AND ARE MORE LIKELY TO HAVE A COLLEGE DEGREE.

There are demographic differences in the sample between print and digital subscribers, and these differences could be related to format preferences or could be the result of the specific respondents who completed the survey. It is important to understand that demographics and news behaviors or attitudes such as platform preferences are all highly related.

Looking first at the print-preference respondents, these folks are about half men and half women. Nearly 7 in 10 are 60 years old or older. Six in 10 have a college degree, and 31 percent earn \$100,000 or more a year. Nearly half are Democrats; 37 percent are Republicans.

Digital subscribers, on the other hand, are more likely to be male (59 percent) and are less likely to be older than print subscribers (57 percent are 60 years old or older).

More digital respondents have a college degree than print respondents (77 percent vs. 64 percent), and those in the digital group also tend to be higher-income, with 44 percent earning \$100,000 a year or more.

Respondents who prefer digital are more likely to be Democrats (56 percent) and less likely to be Republicans than print respondents (31 percent vs. 37 percent).

Digital subscribers are more likely than print readers to be urban, subscribe to large metro.

	Print subscribers	Digital subscribers
Urbanicity		
Urban area	26	34
Suburban area	57	47
Rural area	16	19
Paper size		
Small	18	7
Mid-size	17	7
Small metro	35	24
Large metro	30	62

SIMILAR FACTORS LEAD DIGITAL AND PRINT RESPONDENTS TO SUBSCRIBE, BUT THERE ARE SOME IMPORTANT DIFFERENCES.

When asked to tell us in their own words why they decided to subscribe, are print readers different than digital? While they have some similarities, it is fair to say that digital readers have some greater degree of intentionality. They tend to hunt more for the content they want.

To begin with, print readers most often cite a desire for local news, the convenience of print or home delivery, and seeing a promotion or discount on the subscription.

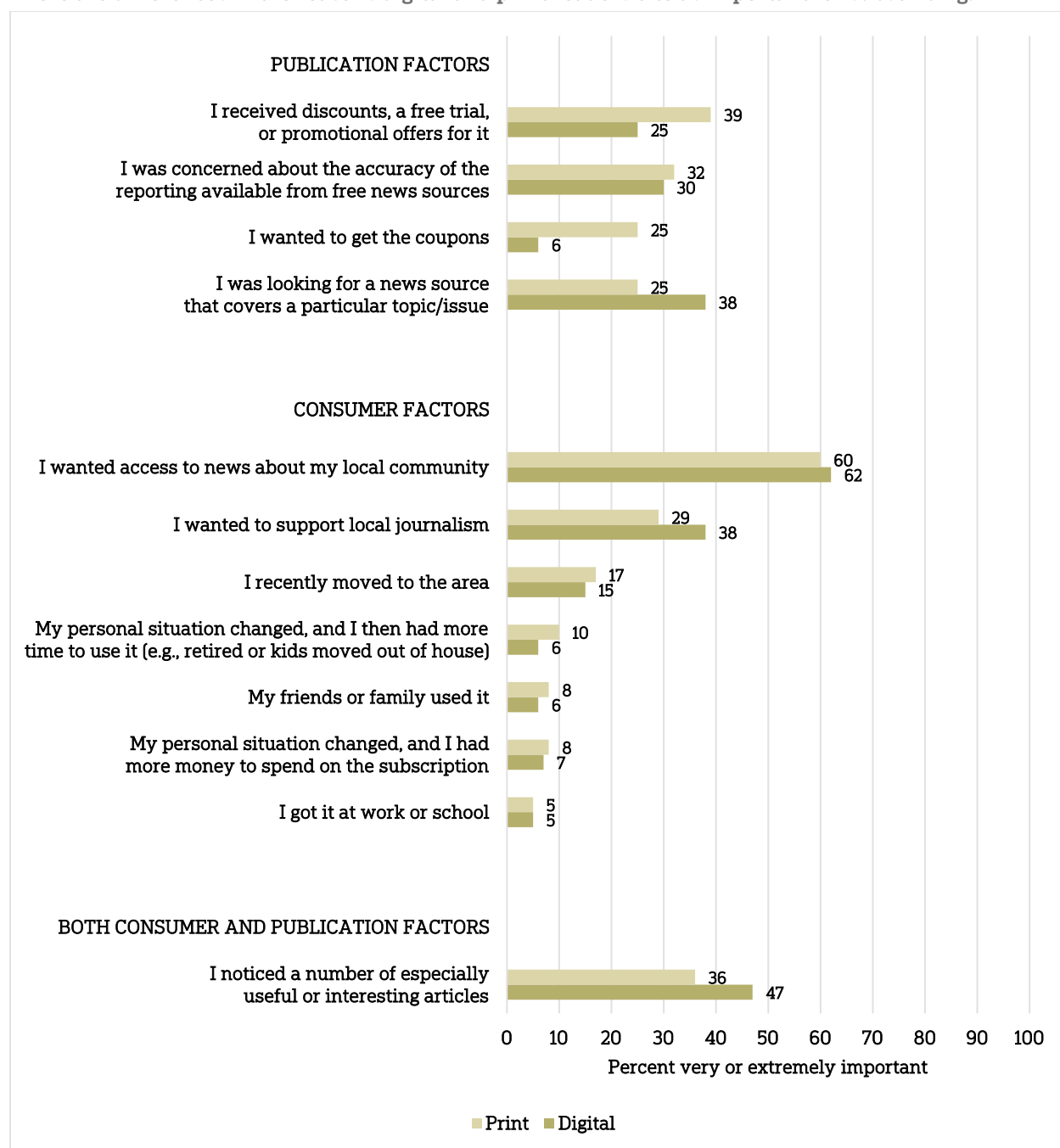
Digital readers also most frequently cite a desire for local news.

But for respondents who either subscribed only to the digital edition or said they preferred to read digitally, the interest in access to news about the local community is followed by wanting coverage of a particular topic, or for trust and quality reasons. And that in turn is followed by hitting a paywall or article limit.

Asking about the importance of specific background factors provides a similar picture. Print readers say access to local news was very or extremely important to their decision to subscribe, followed by a promotion or discount, and noticing a number of useful or interesting articles.

For digital readers, access to local news is again most popular, but many also say they noticed a number of useful or interesting articles, were looking for a source that covered a particular topic or issue, and wanted to support local journalism.

There are differences in the reasons digital and print readers cite as important for subscribing.



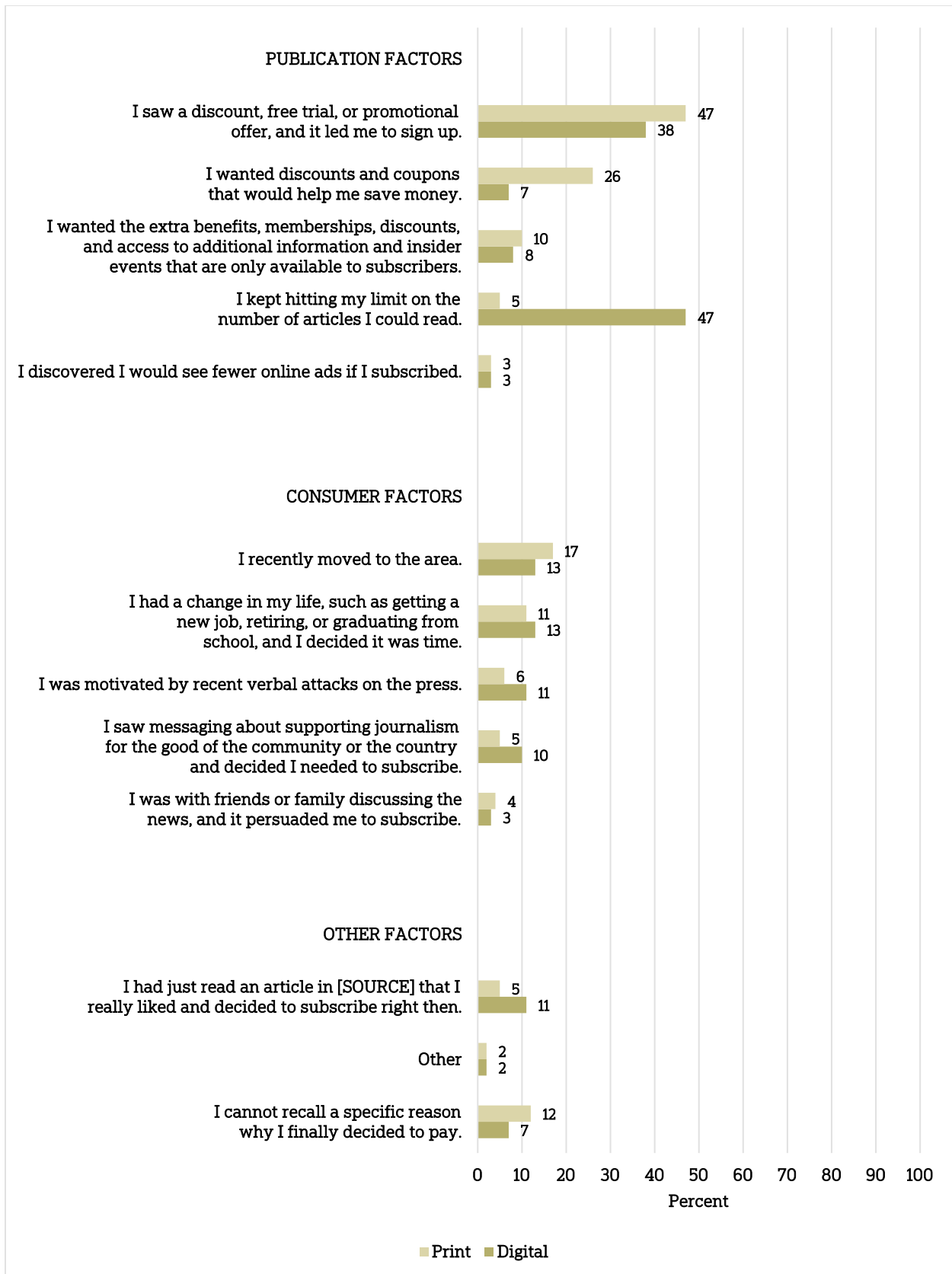
Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Then, when asked about the specific moment or reason they chose to subscribe, half of print readers say a discount or promotion triggered them to subscribe, followed by smaller numbers who cite a desire for coupons (26 percent) or having recently moving to the area (17 percent).

For digital readers, the specific moments or reasons they chose to subscribe appear to be platform related. Half say that they kept hitting a limit in the number of articles they could read, and 38 percent mention a discount or promotion.

Print and digital subscribers cite different factors triggering their subscription.



Question: While people may be thinking about subscribing to a news source for a while, there can be a specific moment or reason that serves as a tipping point when someone makes the decision to subscribe. Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER].

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PRINT AND DIGITAL SUBSCRIBERS CITE SIMILAR REASONS FOR USING THEIR NEWSPAPER.

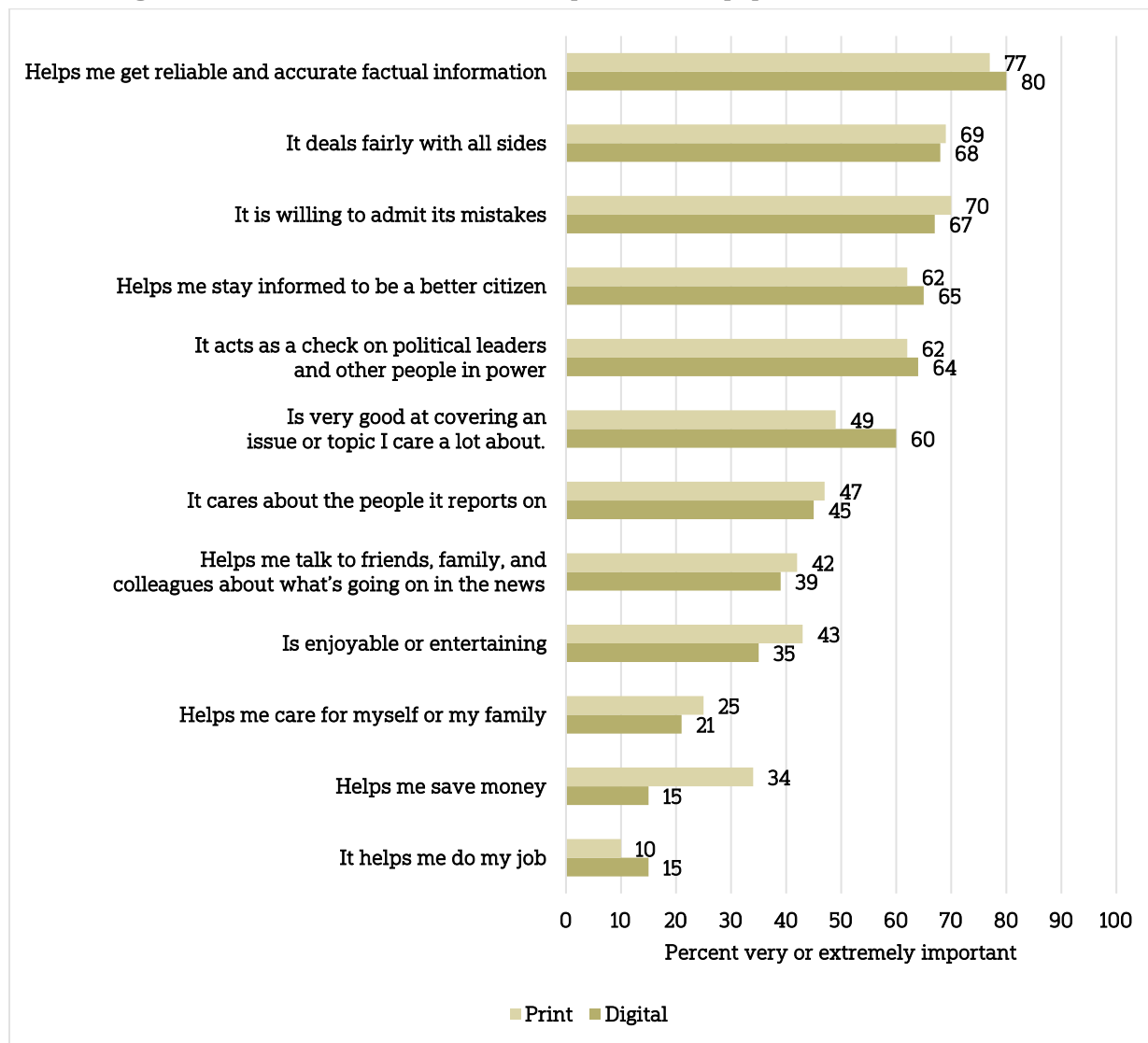
Print subscribers cite a diverse array of reasons why they use the source they pay for. And digital subscribers largely agree with them on the importance of each factor.

This shows that print and digital subscribers use news for similar reasons. From a list of 12 ways in which people use news, there are only two in which digitally oriented subscribers differ from print oriented.

For one, print-oriented readers are more than twice as likely as digital-oriented subscribers to say that the news helps them save money (34 percent vs. 15 percent), driven by print's unique edge in coupons.

Digital-oriented subscribers, meanwhile, are driven more by coverage of a particular topic they care about, although it is important to many in both groups.

Print and digital subscribers often value similar aspects of their paper.



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

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PRINT AND DIGITAL RESPONDENTS VALUE DIFFERENT SUBSCRIPTION BENEFITS.

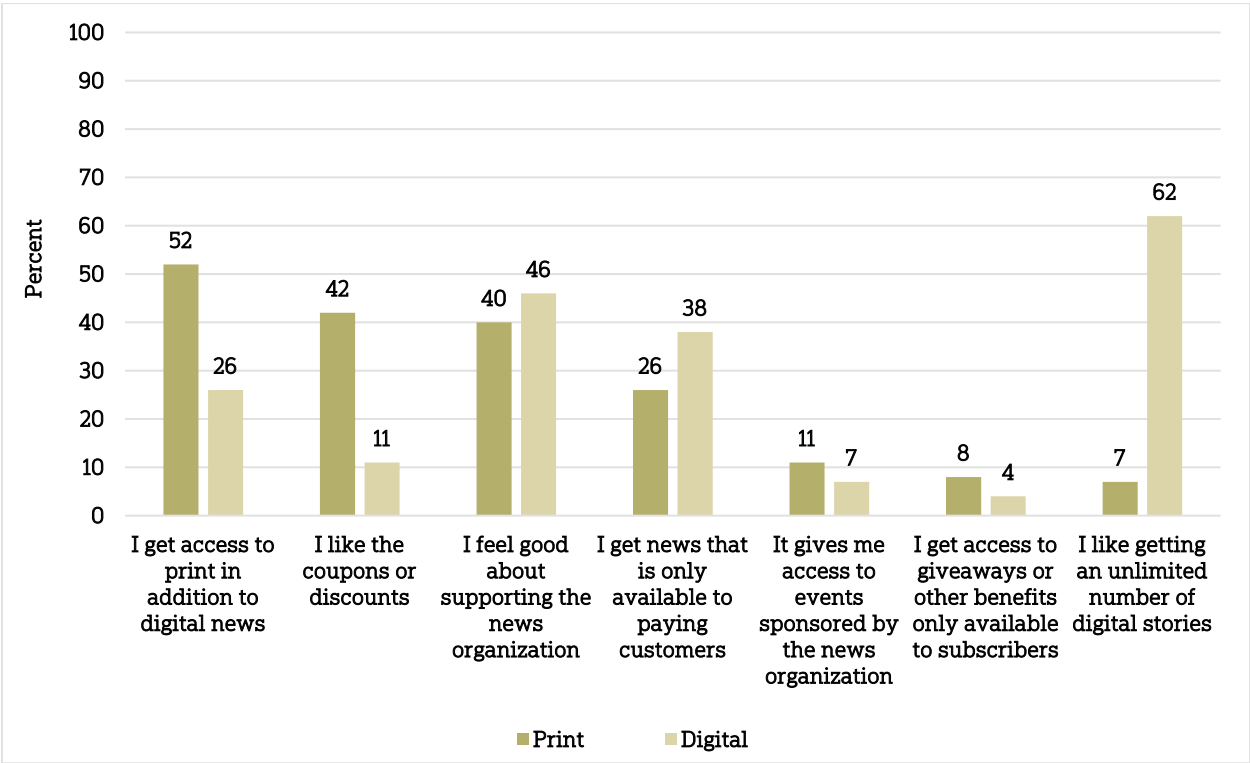
Print subscribers and digital subscribers differ in what they see as the biggest benefits of their subscriptions.

Print subscribers most enjoy their bundled access to print and digital news (52 percent vs. 26 percent for digital), suggesting that even print-minded subscribers make healthy use of digital access at certain times of day. Print readers also say coupons or discounts are an important benefit (42 percent vs. 11 percent for digital).

Digital subscribers, on the other hand, most value benefits like getting an unlimited number of digital stories and getting news only available to paying customers.

Both print and digital subscribers are likely to say they feel good about supporting the news organization.

Digital subscribers value unlimited articles; print subscribers like bundled platforms and coupons.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

SECTION 4

YOUNGER SUBSCRIBERS: WHAT DOES THE FUTURE LOOK LIKE AND HOW ARE THEY DIFFERENT FROM OLDER SUBSCRIBERS?

For several decades now, newspapers have fretted about their aging audience and the challenge of reaching younger readers.

There are promising signs that young people are open to paying for news. Our earlier study of Millennial audiences² (age 18 to 34 at the time), found that 40 percent pay for news content.

How do younger subscribers compare and contrast with those who are older when we get into more detail? Do they subscribe for similar or different reasons? How do younger and older readers use the newspaper?

YOUNGER SUBSCRIBERS IN THE SAMPLE TEND TO BE MORE RACIALLY DIVERSE AND COLLEGE EDUCATED THAN OLDER SUBSCRIBERS.

The respondents in the study are older than newspaper subscribers overall, with 93 percent being 40 years old or older.³ Still, even with just 7 percent of the sample under age 40, the study has a sample of 300 people under 40 years of age.

Overall in our sample, the younger subscribers are more likely than older subscribers to be female (52 percent vs. 47 percent), racially diverse (22 percent non-white vs. 10 percent non-white), and college educated (79 percent vs. 66 percent).

The younger group is also much more likely than older adults to identify as Democrats (61 percent vs. 49 percent) and less likely to identify as Republicans (23 percent vs. 37 percent).

The two age groups are similar in terms of income, with about 3 in 4 in each group earning more than \$50,000 a year.

Younger subscribers are more likely to live in urban areas and subscribe to large metro papers.

	Subscribers age 18-40	Subscribers age 41 and older
Urbanicity		
Urban area	42	27
Suburban area	51	55
Rural area	7	18
Paper size		
Small	6	16
Mid-size	7	15
Small metro	28	33
Large metro	59	36

² <http://www.mediainsight.org/Pages/how-millennials-get-news-paying-for-content.aspx>

³ A 2017 Media Insight Project survey of Americans found that 71 percent of newspaper subscribers were age 40 and older.

YOUNGER SUBSCRIBERS ARE MORE LIKELY TO PREFER DIGITAL AND TO GET NEWS ON SOCIAL MEDIA.

The younger subscribers (40 and under) who responded to our survey still prefer print over digital. But the young are much more digitally inclined (42 percent) than older subscribers (24 percent).

But how they get news differs quite markedly. And the data here offer some potentially challenging findings for television news.

For instance, only a minority of younger recent newspaper subscribers say they get news from television every day (34 percent), compared with 79 percent of those over age 40. Yet, these two age groups are almost identical in their use of computers (desktop or laptop) to get news every day (57 percent and 56 percent), and in their use of radio news (47 percent and 45 percent).

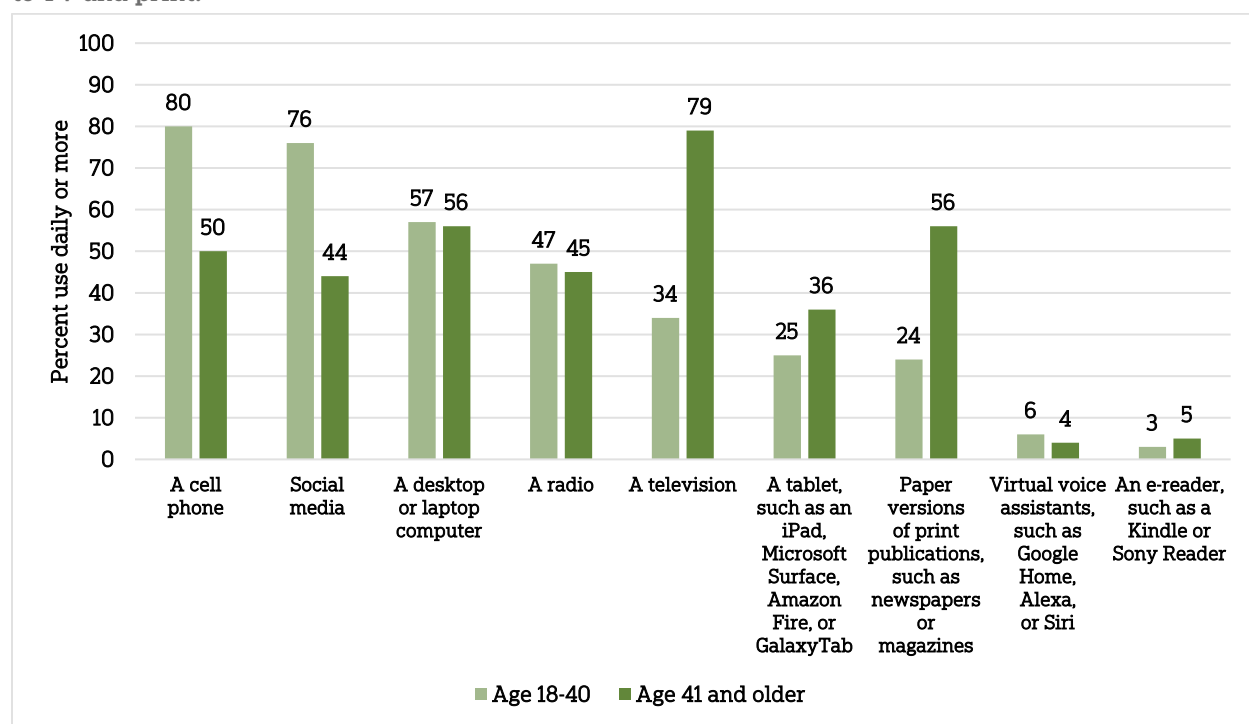
But the data do point toward a growing march toward digital, even among older subscribers.

Young recent subscribers are half as likely to get news daily from print publications, and instead 80 percent use cell phones and 76 percent use social media. While older recent subscribers are more likely to use print every day, half also get news every day on their phones, and a third on a tablet.

Clearly, even for newspaper subscribers, the cell phone is a central part of that digital future.

And an important part of gaining the attention of younger subscribers of the future is to ensure that a publication's best content, the work that people are likely to notice and want to share, is available for discovery on social platforms.

Younger subscribers use cell phones and social media for news most often, while older subscribers turn to TV and print.



Questions: How often, if at all, have you used each device or technology to get news and information in the last week? These days many people get their news and information from social media. How often do you watch, read, hear, or see news on social media?

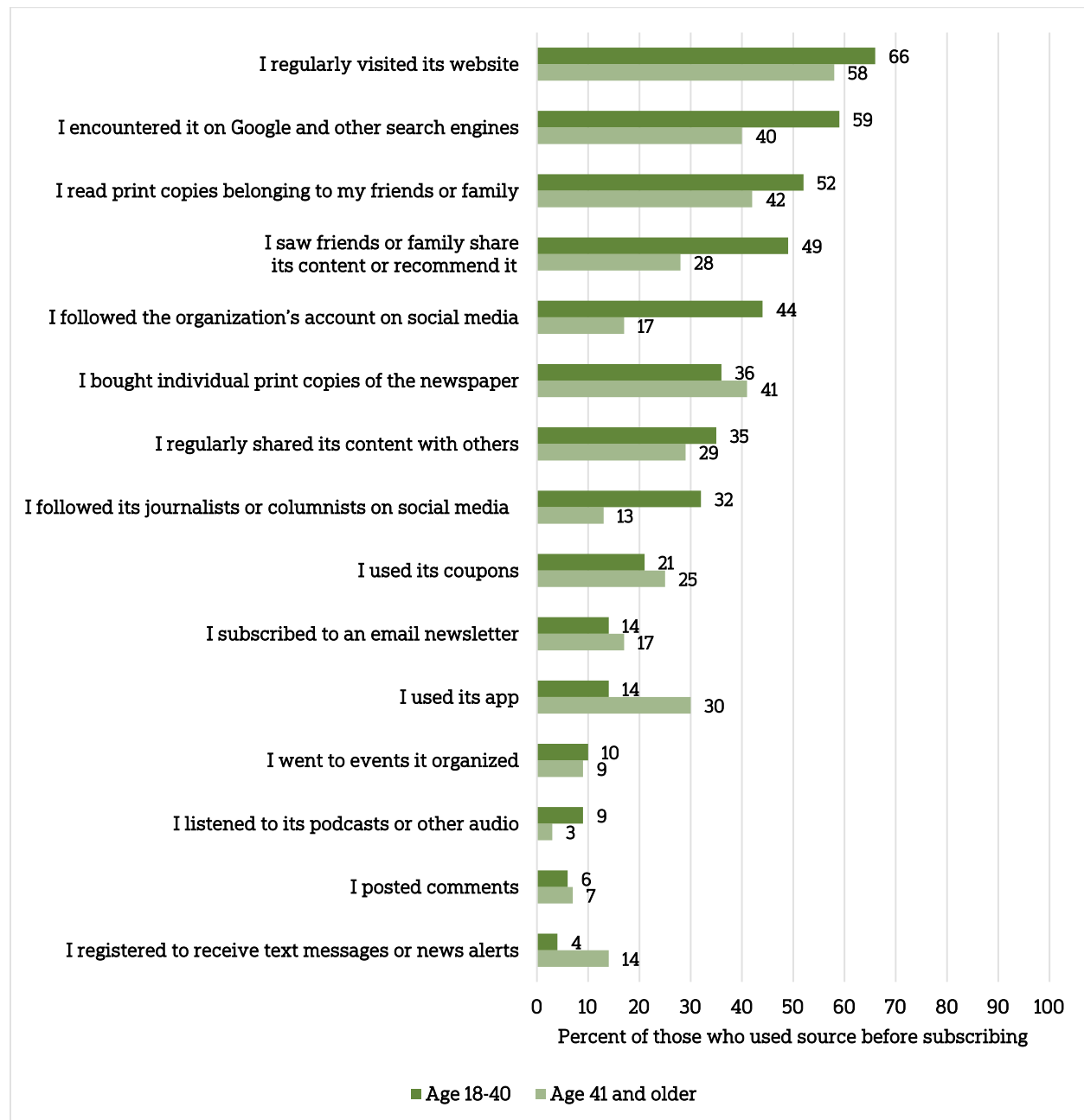
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

YOUNGER RESPONDENTS AND OLDER RESPONDENTS TEND TO USE A NEWSPAPER DIFFERENTLY BEFORE SUBSCRIBING.

There are also some differences in how these two groups interacted prior to subscribing. Older readers are more likely to have used a newspaper's app or to have signed up for news alerts.

However, younger readers are more likely to have been social media followers of the news organization. Younger future subscribers are also more likely to find the paper on search before subscribing, to discover it through friends and family talking about it, and to read borrowed copies from friends and family.

Younger subscribers often engage through search and social media before subscribing.



Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

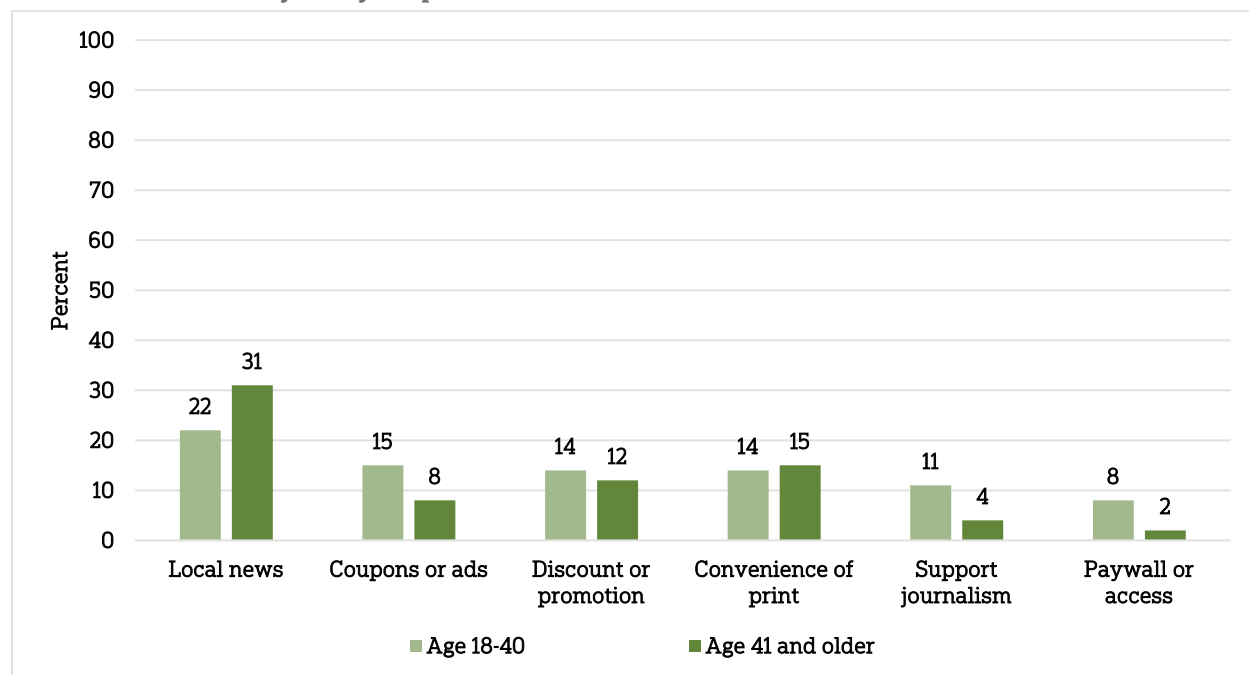
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

THERE ARE BOTH SIMILARITIES AND DIFFERENCES IN THE FACTORS THAT LEAD YOUNGER AND OLDER READERS TO SUBSCRIBE.

When offered the chance to describe in their own words why they chose to subscribe, both groups are most likely to cite a desire for local news, yet older readers are slightly more likely to offer this reason (31 percent vs. 22 percent).

In contrast, younger readers are more likely than older readers to say they chose to subscribe because of either coupons, supporting journalism, or hitting a paywall.

Older subscribers are more likely to say they subscribed to their paper for local news, younger subscribers more likely to say coupons.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]?

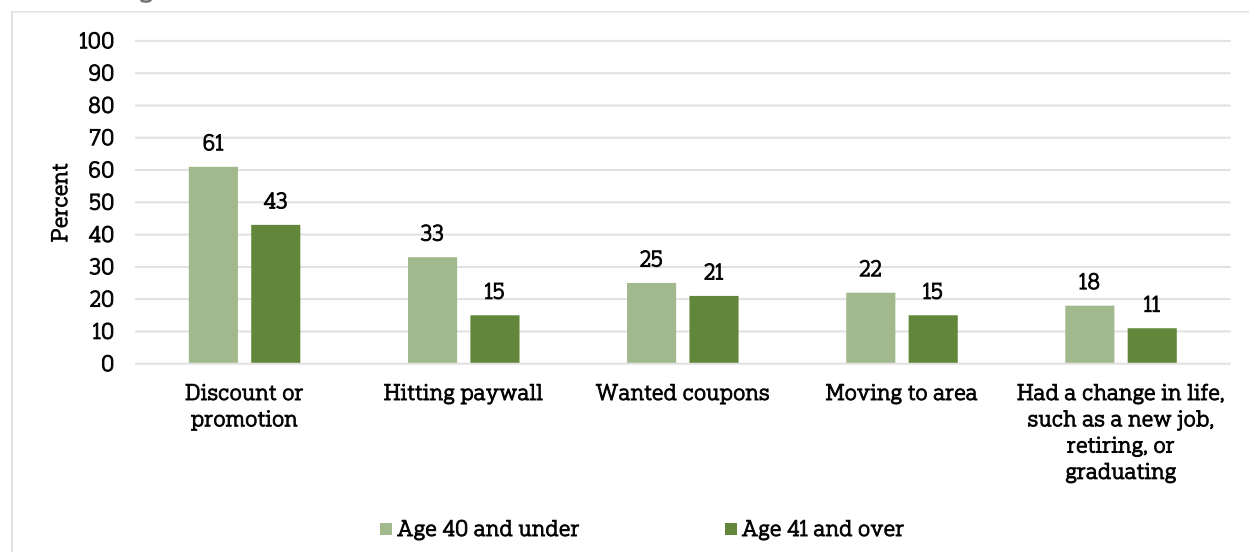
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Younger subscribers also looked a good deal like older ones when asked about the importance of the background factors that generally led to their subscription. Younger subscribers predominantly cite news about their local community (63 percent vs. 60 percent for older respondents), supporting local journalism (46 percent vs. 30 percent for older subscribers), and noticing a number of interesting articles (45 percent vs. 38 percent for those age 40 and over).

But then, when asked about the specific tipping point that pushed them over the edge to subscribe, 61 percent of younger subscribers mention a discount or promotion, 33 percent say they kept hitting an article limit or paywall, and 25 percent say they wanted coupons to help them save money.

Older subscribers still most often mention a discount or promotion (43 percent) as their trigger to subscribe, but this is less often than younger subscribers. Twenty-one percent also mention coupons. But, 15 percent say recently moving to the area led them to subscribe, and 11 percent say the same about another life change.

Younger respondents more likely to cite discounts and hitting a paywall as trigger factors for subscribing.



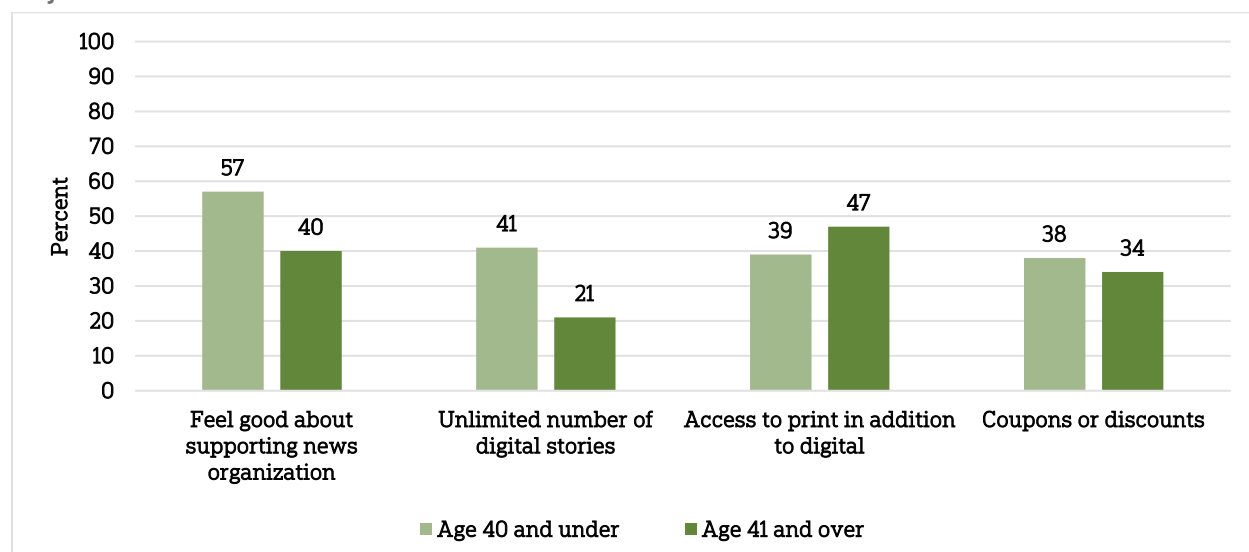
Question: Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Both younger and older subscribers most often say getting reliable and accurate information, a willingness to admit mistakes, the outlet dealing fairly with all sides, and a desire to be an informed citizen are important reasons they use their newspaper now that they subscribe.

But younger subscribers are more likely than older subscribers to say that feeling good about supporting the news organization and getting an unlimited amount of digital content are benefits of subscribing. Many younger subscribers also say access to print in addition to digital news is among the biggest benefits of their subscription, although fewer of them say this than older subscribers. Yet again, this is a sign that print-oriented subscribers still are increasingly digital users.

Younger subscribers are more likely to cite feeling good about supporting a news organization as a major benefit.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

SECTION 5

MARKET SIZES: WHAT ARE THE VARIATIONS IN MOTIVATION/VALUE PROPOSITION BY SIZE OF MARKET/CIRCULATION?

The survey featured new subscribers from 90 newspapers, which ranged from small papers to some of the largest papers in the country. This wide array of newspapers allows for an examination of whether the paths to subscription vary depending on the circulation size of a newspaper, as circulation size is often related to both news coverage and business practices. In order to assess similarities and differences based on newspaper size, the analysis focuses on four types of newspapers: small papers (circulation of 50,000 or less), mid-sized papers (circulation of 50,001-99,999), small metro papers (circulation of 100,000-199,999), and large metros (circulation of 200,000 or more).

WITH THE SAMPLE, RESPONDENTS FROM LARGER NEWSPAPERS TEND TO BE YOUNGER AND ARE MORE LIKELY TO HAVE A COLLEGE DEGREE THAN RESPONDENTS FROM SMALLER NEWSPAPERS.

Before comparing the paths to subscription for each newspaper size, it is important to recognize the demographic differences among survey respondents from each type of newspaper. Differences between different size newspapers' subscriber attitudes and behaviors are likely a function of both the demographic makeup of their subscribers and of the size of the paper.

In terms of age, 12 percent of respondents from large metro papers are 40 years old or younger compared with 7 percent from small metros, 4 percent from mid-sized papers, and 3 percent from small papers. Likewise, 73 percent of respondents from large metros have a bachelor's degree compared with 62 percent from small metros, 66 percent from mid-sized papers, and 63 percent from small papers.

About 7 in 10 subscribers from each paper size have household incomes of more than \$50,000, but there is some variation in this proportion when looking at respondents from large metros (77 percent), small metros (71 percent), mid-sized papers (69 percent), and small papers (66 percent).

There is also variation in partisanship with respondents from the various paper sizes. Large metros tend to have more Democrats than Republicans (59 percent vs. 29 percent), as do mid-sized papers (56 percent vs. 27 percent). In contrast, there is a relatively even split between Democrats and Republicans among respondents of both small metros (41 percent vs. 44 percent) and small papers (41 percent vs. 41 percent).

RESPONDENTS FROM LARGE PAPERS ARE THE MOST LIKELY TO HAVE USED THE NEWSPAPER BEFORE SUBSCRIBING AND ARE LEAST LIKELY TO GET NEWS IN PRINT.

Subscribers from large and small papers tend to follow news in similar ways, but there are a few differences in regards to format and using the paper before subscribing.

Small paper subscribers are more likely to be heavy print users. Seventy-three percent of small paper subscribers say they are daily print users compared to 65 percent from mid-sized papers, 55 percent from small metros, and 42 percent from large metros. Likewise, subscribers to large metros are less likely than subscribers to other papers to get a print newspaper (64 percent vs. 84 percent for small metro, 92 percent for mid-sized, and 91 percent for small paper).

However, large metro subscribers are notably more likely than readers of smaller papers to have used the paper before they subscribed (46 percent compared with 29 percent from small metros, 19 percent from mid-sized, and 24 percent from small papers).

RESPONDENTS FROM LARGE AND SMALL PAPERS CITE DIFFERENT REASONS FOR SUBSCRIBING.

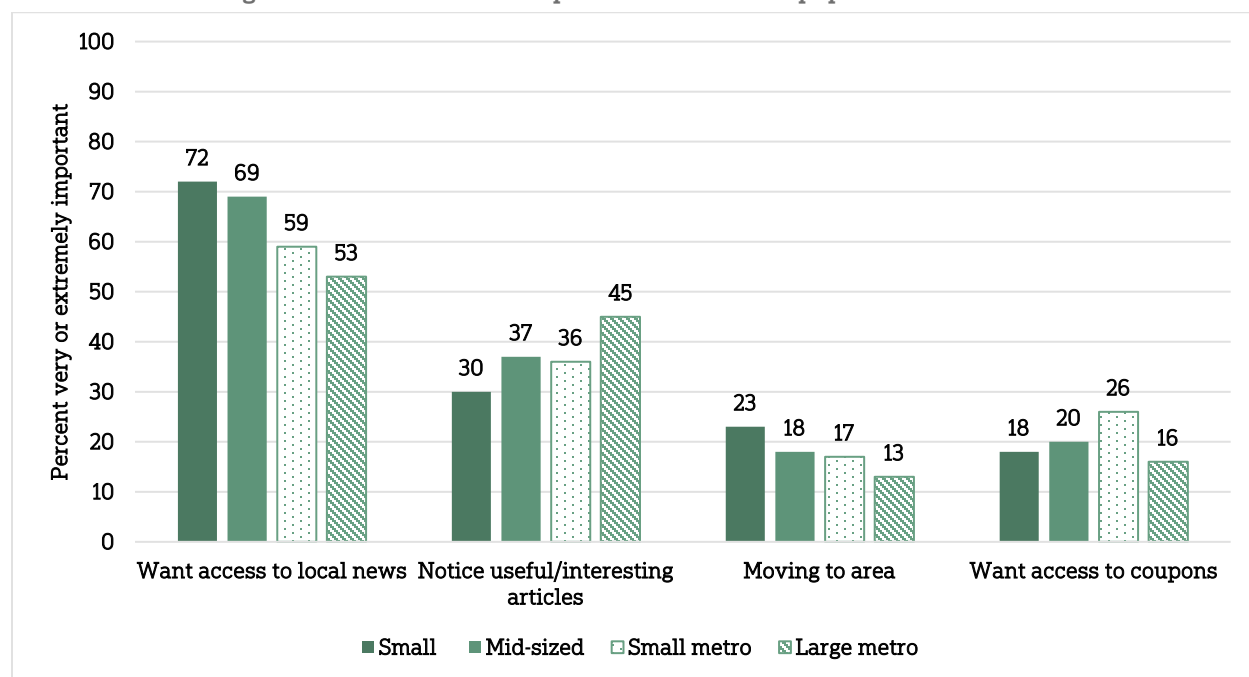
Several of the factors respondents say were important before subscribing tend to vary based on newspaper size.

Wanting access to news about their community is more likely to be important for subscribers from small and mid-sized papers than those from small or large metros.

When it comes to background factors for subscribing, respondents from small papers tend to cite moving to the area more often than those from large metros. Respondents from large metros are the most likely to say an important factor was noticing a lot of interesting and useful articles.

Access to coupons tends to be a more important factor for subscribers to small metros than those from large metros.

Differences in background factors for subscription based on newspaper size.



Question: How important was each of these factors as you considered subscribing?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

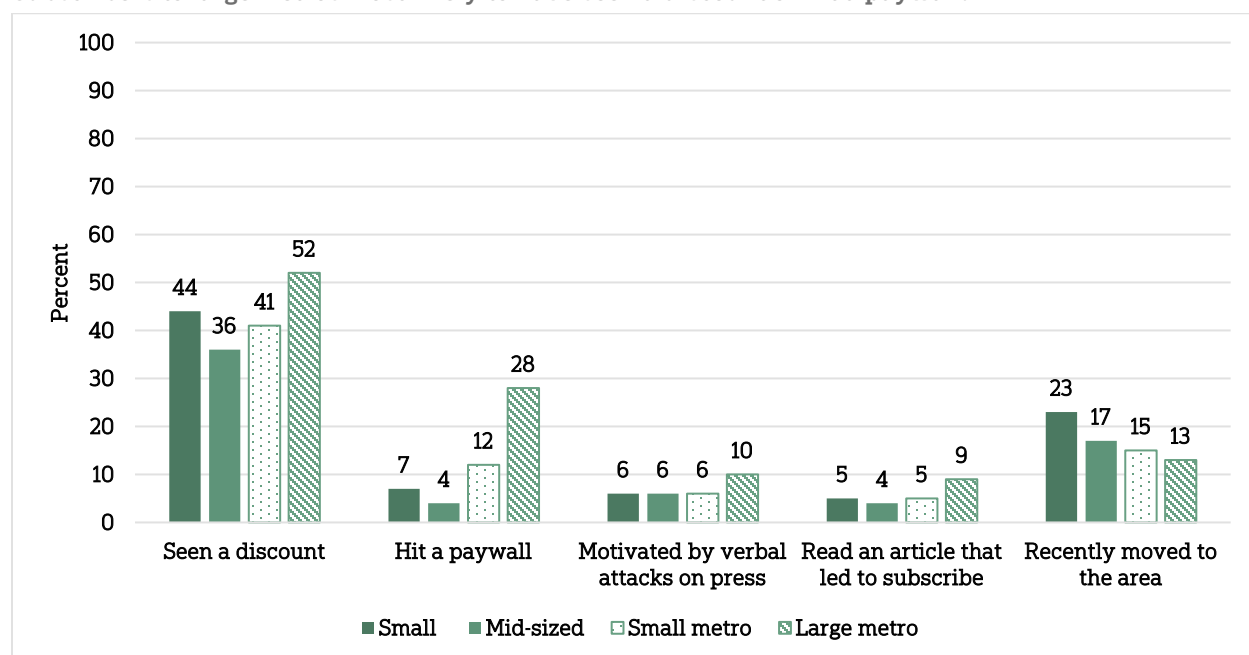
DISCOUNTS AND PAYWALLS ARE MORE LIKELY TO BE A TRIGGER FOR RESPONDENTS FROM LARGE PAPERS THAN SMALL PAPERS.

Newspaper size also correlates to the trigger factors that ultimately led respondents to subscribe.

In particular, respondents from large metro papers are more likely than other respondents to have decided to subscribe because they saw a discount or hit a paywall. Large metro papers also are somewhat more likely to benefit from people motivated by recent verbal attacks on the press, though for all papers these are smaller numbers. Big metro subscribers also are more likely to say they had just read an article they really liked that led them to subscribe.

In contrast, respondents from small papers are most likely to report their trigger was recently moving to the area (23 percent vs. 17 percent for midsized, 15 percent for small metros, and 13 percent for large metros).

Subscribers to large metros most likely to have seen a discount or hit a paywall.



Question: Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER].

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

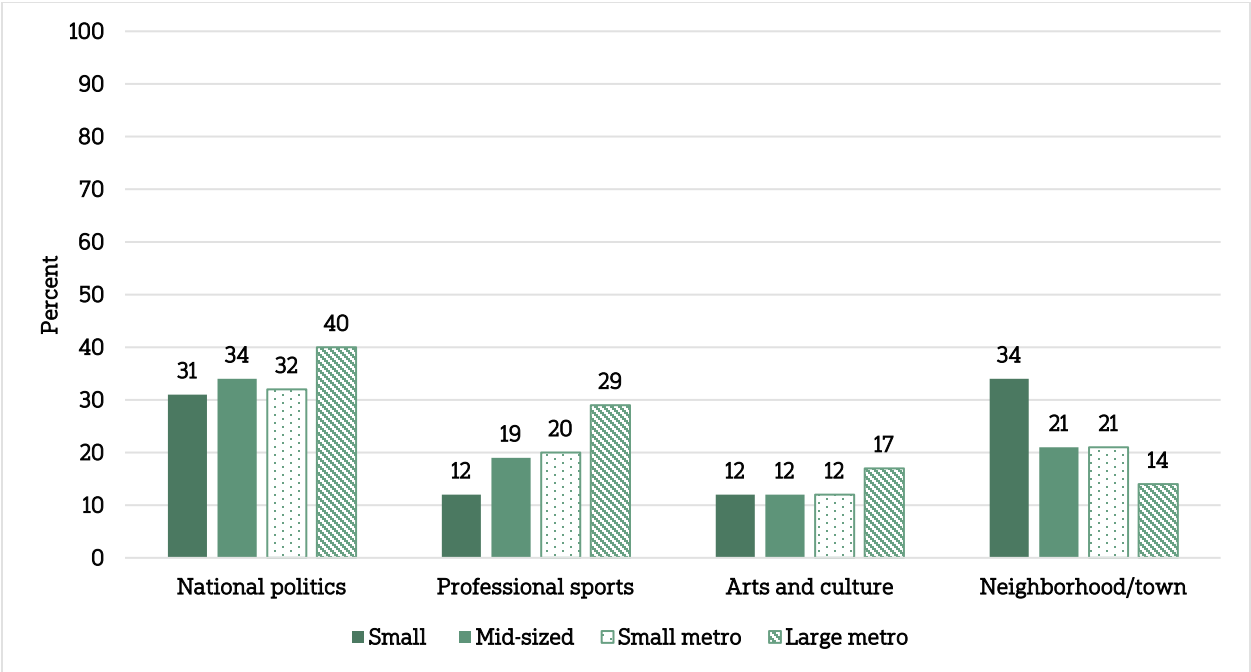
RESPONDENTS FROM LARGER PAPERS ARE MORE LIKELY TO FOLLOW NATIONAL NEWS, WHILE RESPONDENTS FROM SMALL PAPERS ARE MORE LIKELY TO FOLLOW LOCAL NEWS.

Newspaper size is also connected to the topics subscribers tend to follow most closely. As one might expect, large metro subscribers tend to follow more national news, while small paper subscribers tend to follow more local news.

In a similar vein, large metro subscribers are more likely than subscribers to smaller papers to follow national politics, professional sports, and arts and culture.

At the same time, subscribers to small papers are more likely than subscribers at larger papers to follow news about their neighborhood.

Subscribers to large metros are most likely to follow national politics or professional sports.



Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

These differences may seem to reflect the expected when it comes to different sized papers. But we believe it would be a mistake to think the implication is that the task of smaller papers is easier or even more print focused.

Indeed, inevitably the cost structure of smaller newspapers is still heavily tied to the cost of printing and delivery, and the future involves reducing those costs—not simply continuing to reduce the newsroom. The differences between the appeal of small papers and the motivations of their readers, to the contrary, may point to alliances between large and small publishers and perhaps exploring bundling subscription options so that readers can get the combined benefits of both kinds of publications. Increasingly, the data suggest that, instead of seeing their business models as different, papers of different sizes could work together through subscription and technological alliances in ways that could be beneficial to both.

SECTION 6

PARTISANS: WHAT DRIVES REPUBLICANS VS. DEMOCRATS TO BECOME PAYING SUBSCRIBERS?

In 2017, a Media Insight Project study⁴ used two surveys to evaluate similarities and differences between Republicans and Democrats in their news consumption behavior and their attitudes towards the media. It found that while the two parties differed sharply in their opinions and beliefs about the media, they were strikingly alike in their news behaviors. They were not only equally likely to seek out news actively rather than passively, get news multiple times a day, and get it from social media, but they also subscribed to news sources at similar rates.

This survey allows us to go beyond simple rates of subscribing and dig deeper into the paths Republicans and Democrats take to subscribing to newspapers. What do they find important as they considered subscribing? What specifically triggers them to start paying? How did they use the paper before starting to pay for it, if at all? What do they say are the most important aspects of the paper they pay for?

While this survey uses a broad sample of subscribers from across the country, the partisan differences below may not be completely due to partisanship, as the age, education, income, and geographic makeup of the subscribers interviewed influence the composition of each partisan group.

Among respondents, Democrats and independents are more likely to be age 40 or younger than Republicans (9 percent and 8 percent vs. 5 percent), and Democrats are more likely than independents or Republicans to have a college degree (73 percent vs. 59 percent and 62 percent). About 3 in 4 self-identified Democrat and Republican respondents have household incomes of \$50,000 per year or more, compared with 59 percent of those who describe themselves as independent.

Despite these demographic differences, the comparisons will give a general sense as to how these Republican, Democrat, and independent respondents became paying subscribers and what they look for in a newspaper subscription.

IN THEIR OWN WORDS, THE MOST COMMON REASONS DEMOCRATS AND REPUBLICANS SUBSCRIBE ARE GETTING LOCAL NEWS AND ENJOYING PRINT NEWSPAPERS, BUT THERE ARE SOME DIFFERENCES BY PARTY IDENTIFICATION.

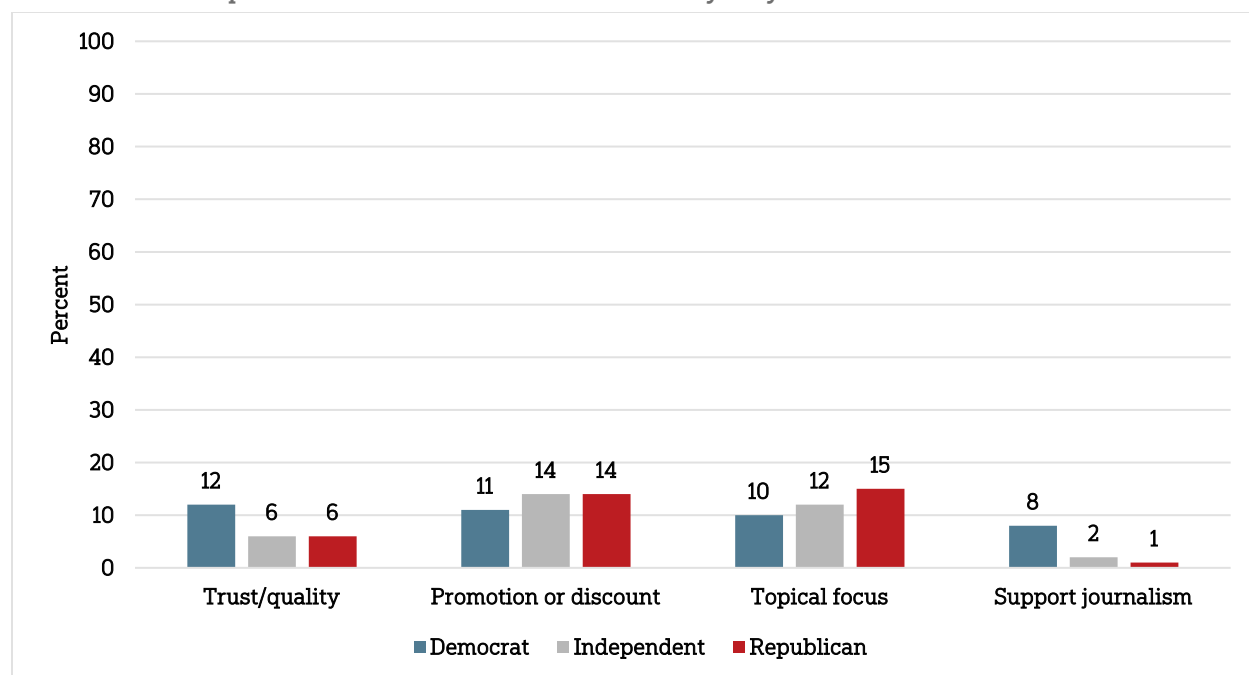
Among Democrats, Republicans, and independents alike and in their own words, the most common reasons they give for subscribing are wanting access to local news (about 30 percent of each group) and liking print newspapers or home delivery (about 15 percent of each group). The third most-mentioned reason varies by partisanship—for Democrats, it's trust and quality; for independents, it's promotions or discounts; and for Republicans, it's a topical focus.

Democrats tend to cite reasons having to do with journalism as an institution or coming across a newspaper that's better than the competition. Democrats are most likely to say they subscribed to support journalism or because of trust in the source or its quality.

⁴ <http://mediainsight.org/Pages/Partisanship-and-the-Media-How-Personal-Politics-Affect-Where-People-Go-What-They-Trust-and-Whether-They-Pay.aspx>

And money matters across the partisan spectrum—all partisan groups were at least three times as likely to mention a promotional offer as to mention running into a paywall.

Democrats and Republicans offer different reasons for why they decided to subscribe.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

WHEN THINKING ABOUT WHAT'S IMPORTANT TO THE DECISION TO SUBSCRIBE, SUPPORTING LOCAL JOURNALISM AND QUALITY ARE MORE IMPORTANT TO DEMOCRATS THAN OTHERS.

Subscribers were presented with a list of 12 factors they could consider when subscribing, ranging from practical value and promotions to those dealing with the quality of and support for journalism as a whole. On average, Democrats identified more of these factors as being important to their decision—3.2 reasons, compared with 2.8 for independents and 2.5 for Republicans.

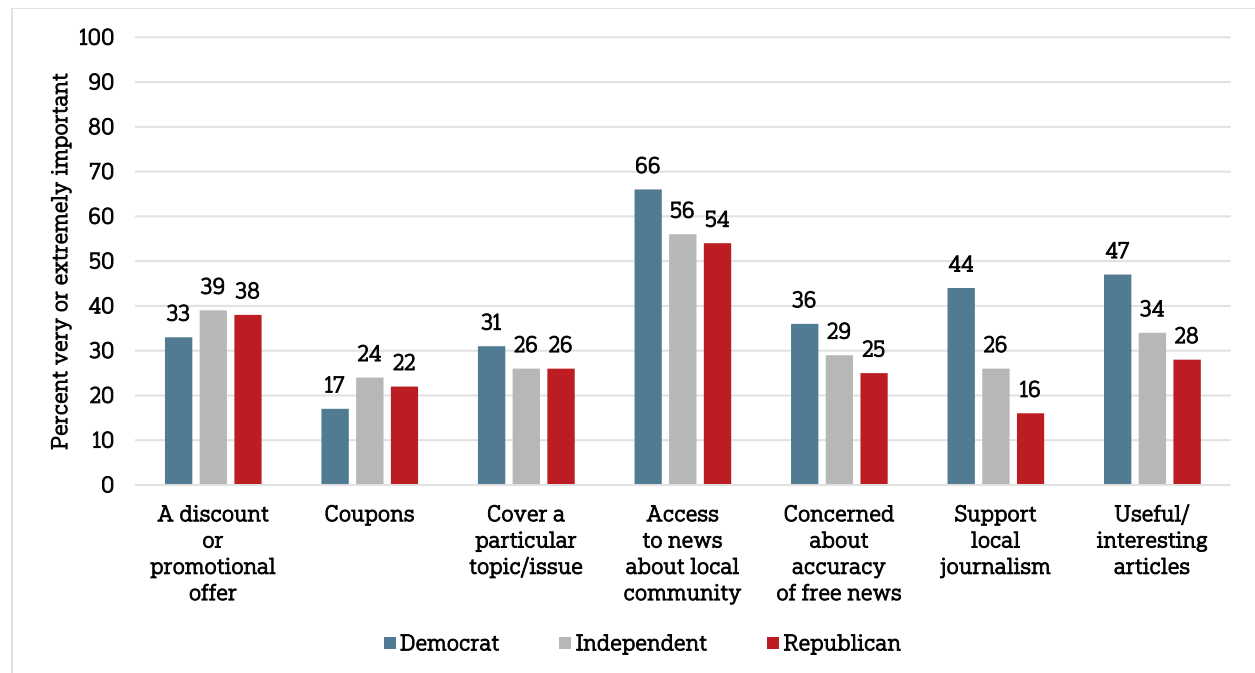
For a majority of all partisan groups, keeping up with news about their local community is cited as an important reason, and noticing a number of interesting and useful articles is in the top three reasons for each. A top reason for Democrats is supporting local journalism, while promotional offers are key factors for independents and Republicans.

For Democrats, keeping up with and supporting local news are key reasons to subscribe. Democrats are more likely than independents or Republicans to say it was important that they have access to news about their local community, although this is the top factor for all three groups. Democrats are also the most likely to say they wanted to support local journalism.

In addition, Democrats are motivated by quality more often than independents and Republicans. They are more likely to report concerns over the accuracy of free news sources as important and to say they noticed a number of useful or interesting articles.

Though the differences are minor, Republicans and independents are more likely than Democrats to say getting coupons or seeing a promotional offer were important to their decision to subscribe.

There are partisan differences when it comes to reasons readers considered subscribing.



Question: How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

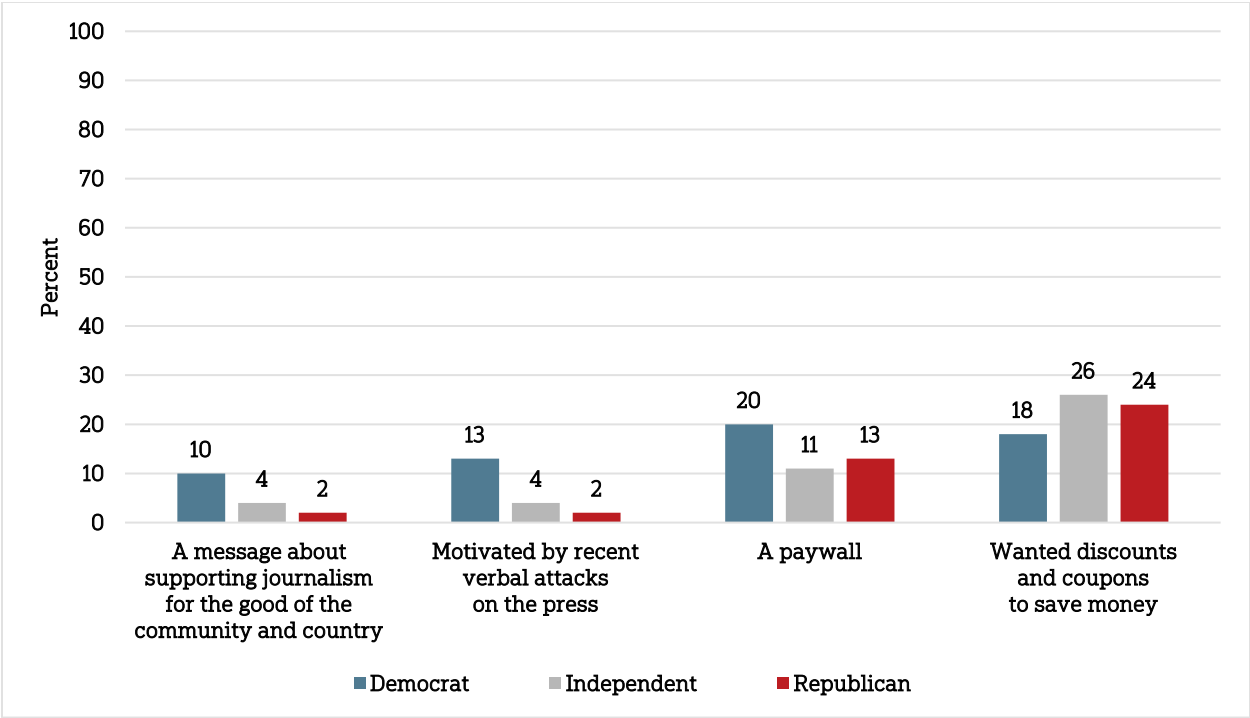
THOUGH PARTISANS' TRIGGER FACTORS ARE LARGELY THE SAME, DEMOCRATS ARE MORE LIKELY TO TAKE THE PLUNGE TO SUBSCRIBE IN ORDER TO SUPPORT JOURNALISM.

Partisans and non-partisans alike largely subscribe for similar reasons, and are equally likely to cite the most common tipping point when making the final decision to subscribe—seeing a discount, free trial, or promotional offer (44 percent of Democrats, 45 percent of independents, 45 percent of Republicans).

However, Democrats are the most likely to have taken the plunge in order to back a free press. Democrats are more likely than independents or Republicans to say they were moved by a message about supporting journalism for the good of the community and country or by recent verbal attacks on the press.

Democrats are also more likely than independents or Republicans to have been triggered by a paywall, but less likely to say their breaking point was wanting coupons.

The trigger factors for subscribing vary between Democrats and Republicans.



Question: Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PARTISANS DIFFER IN THE TOPICS THEY FOLLOW IN THE NEWS.

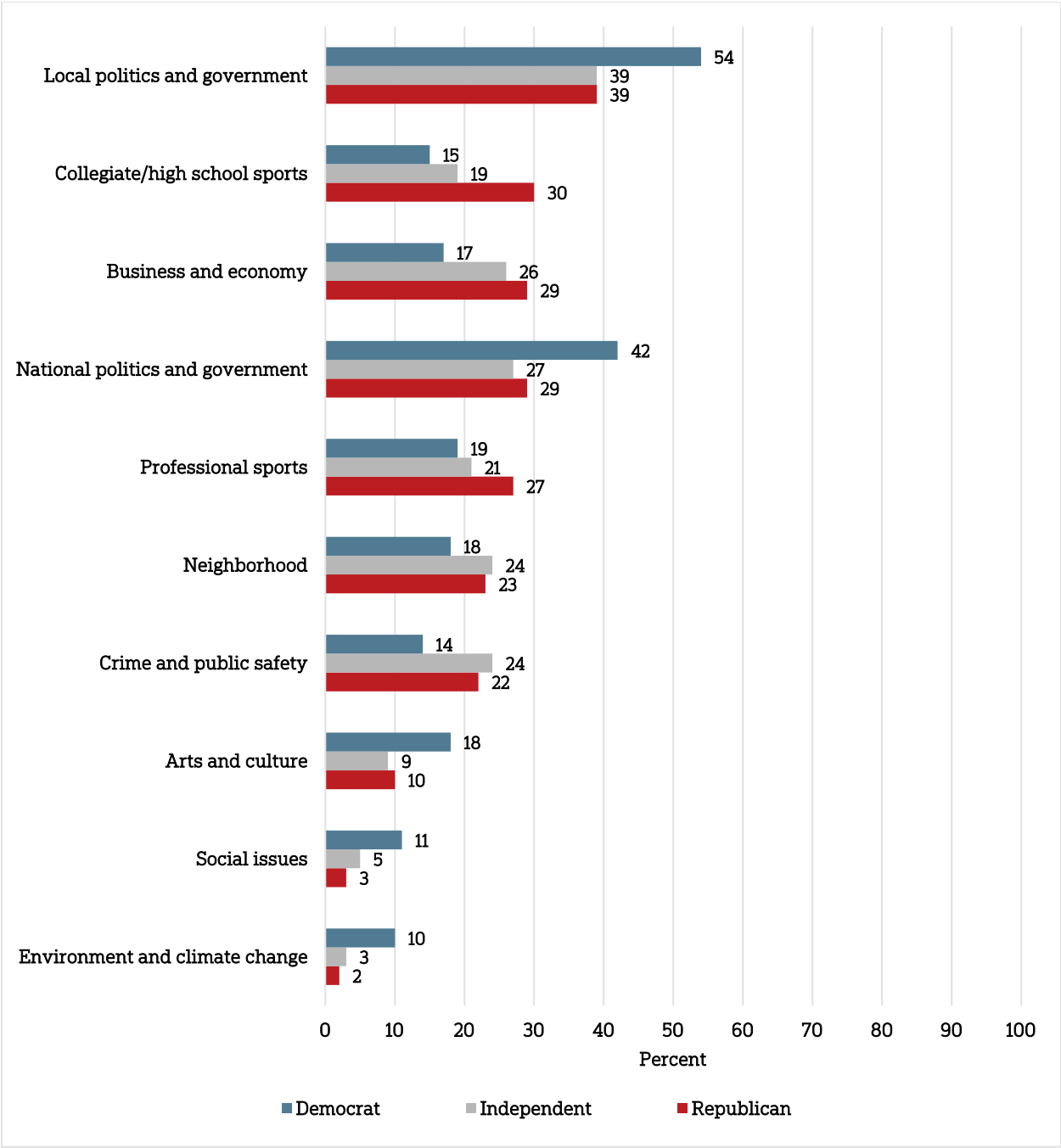
Hard news about the community and the nation is universally popular among subscribers, regardless of party. Local politics and government is the most common news topic, cited by more than half of Democrats and 4 in 10 Republicans and independents. National news and government also are among the top three most followed topics for Democrats, Republicans, and independents alike.

When it comes to differences between groups, Democrats are more likely than Republicans to follow news about national politics and government, arts and culture, social issues like abortion and race, and the environment and climate change.

In contrast, Republicans are more likely than Democrats to follow sports (collegiate, high school, and professional), business and the economy, news about the neighborhood or suburban town where they live, and crime and public safety.

Independents generally align more with Republicans in terms of the news topics they follow, though they are less likely to use their newspaper for news about sports, both high school/collegiate and professional.

Democrats, independents, and Republicans tend to follow different topics.



Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]? Please select up to three (3).
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

DEMOCRATS CITE MORE REASONS AS IMPORTANT WHEN IT COMES TO EXPLAINING WHY THEY USE THEIR SOURCE OF CHOICE.

Democrats tend to name more reasons they use their source as being very important than do independents and Republicans. On average, Democrats cite about seven important reasons, while independents and Republicans name five. While qualities like helping to stay informed, reliability, and being willing to admit mistakes are important qualities for subscribers of all political stripes, Democrats are more likely to place greater value on many of these factors.

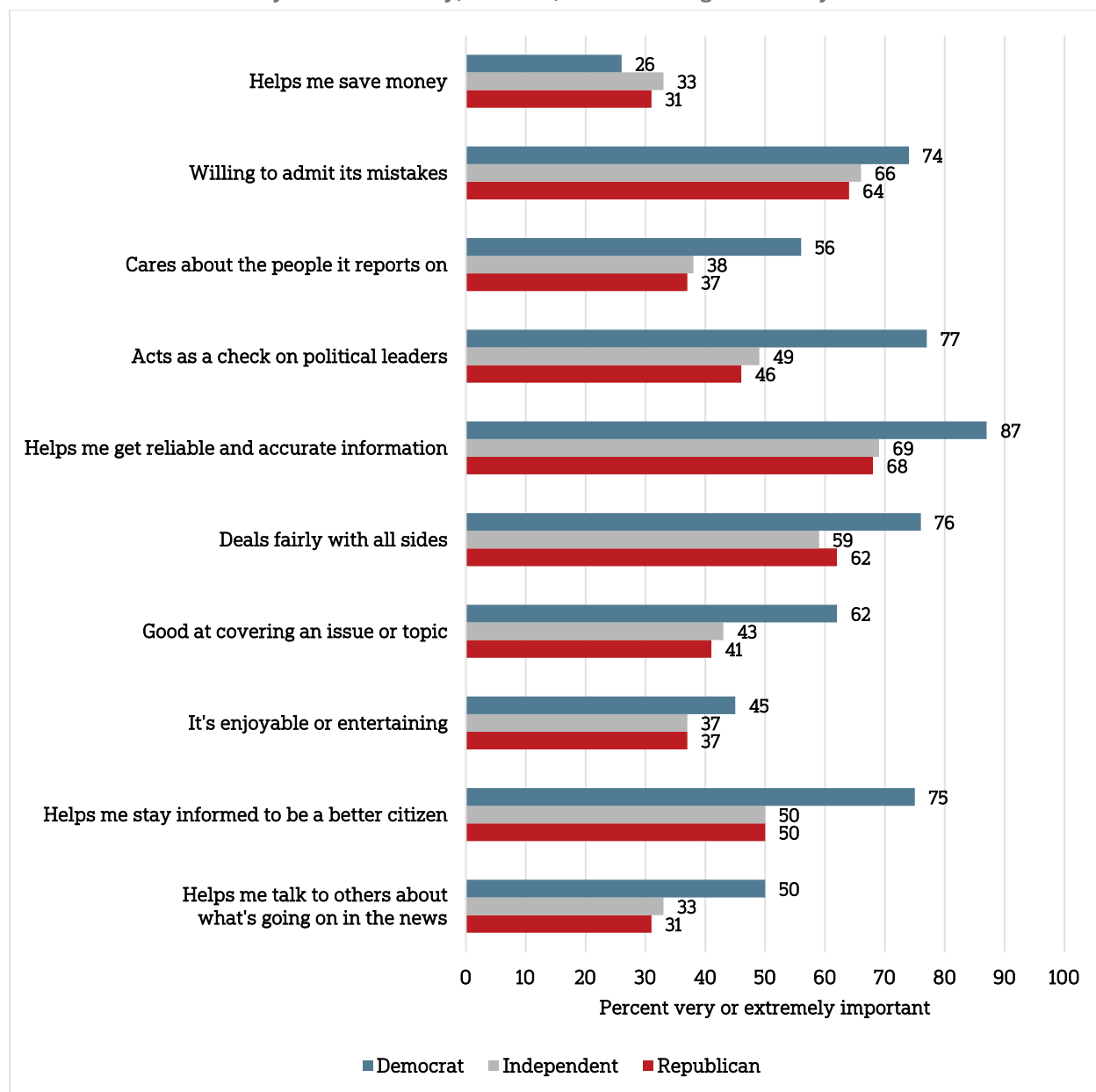
Democrats are more likely than independents or Republicans to say it's very important that their newspaper helps them talk to others about what's going on in the news and helps them stay informed and be a better citizen, though this is important to majorities of all groups. Democrats are also even more likely than independents or Republicans to say excellent topic coverage is important.

Accuracy and fairness also matter in similar levels across party. Being unbiased and accurate are both important to at least 6 in 10 subscribers regardless of partisanship. However, Democrats are more likely than independents or Republicans to say it's important that their newspaper deals fairly with all sides, and helps them get reliable and accurate information.

In terms of journalistic integrity and its political role, Democrats are more likely than independents or Republicans to say it's important that their source acts as a check on political leaders and others in power, cares about the people it reports on, and is willing to admit its mistakes.

As for more practical factors, Republicans and independents are more likely than Democrats to say it's important that their newspaper helps them save money. On the other hand, Democrats are more likely than independents or Republicans to say it's important that their source is enjoyable or entertaining.

Democrats are more likely to cite accuracy, fairness, and watchdog role as key benefits.



Question: When it comes to the biggest reasons you use [NAME OF NEWSPAPER], how important to you is it that it...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

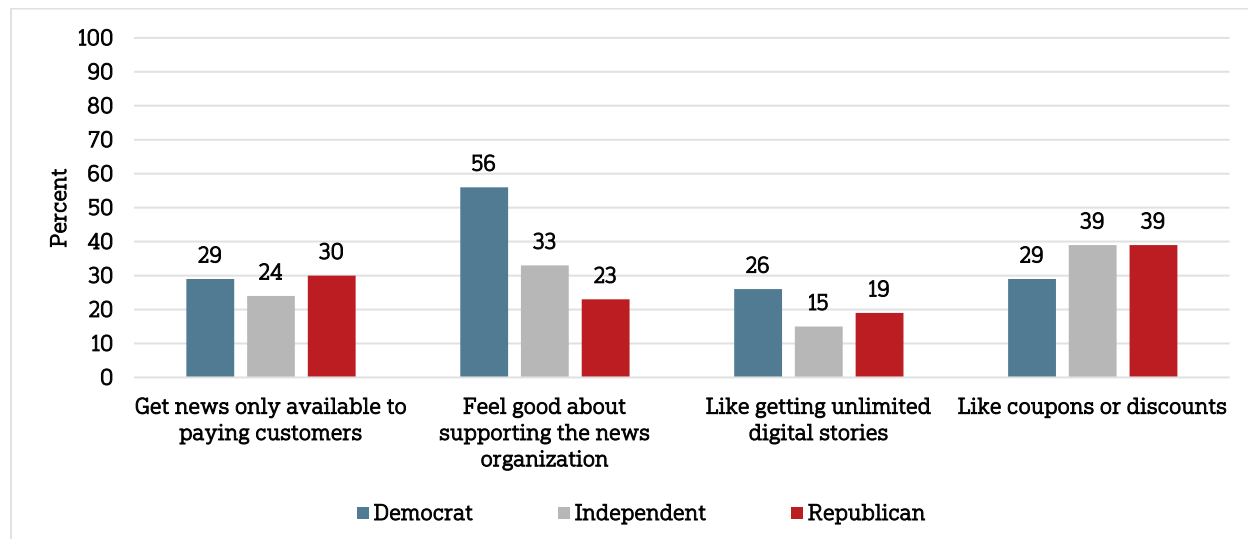
MORE THAN HALF OF DEMOCRATS SAY FEELING GOOD ABOUT SUPPORTING THE NEWS ORGANIZATION IS THE BIGGEST BENEFIT THEY GET FROM SUBSCRIBING.

The largest difference among subscribers by partisanship when it comes to the biggest perk of subscribing is feeling good about supporting the news organization. More than half of Democrats, a third of independents, and about a quarter of Republicans say the biggest benefit they get from subscribing is the rewarding value of supporting a news outlet.

Republicans and independents tend to appreciate their subscription more for the savings it yields them. Four in 10 Republicans and independents say their biggest benefit from subscribing is the coupons or discounts, compared with 3 in 10 Democrats.

Partisans are somewhat more likely to value exclusive and unlimited content. Democrats and Republicans are slightly more likely than independents to say the biggest benefit is getting news only available to paying customers. Similarly, Democrats are the most likely, followed by Republicans and independents, to say they like getting an unlimited number of digital stories.

Democrats are most likely to say the biggest benefit of their subscription is feeling good about supporting journalism, while Republicans most often cite coupons.

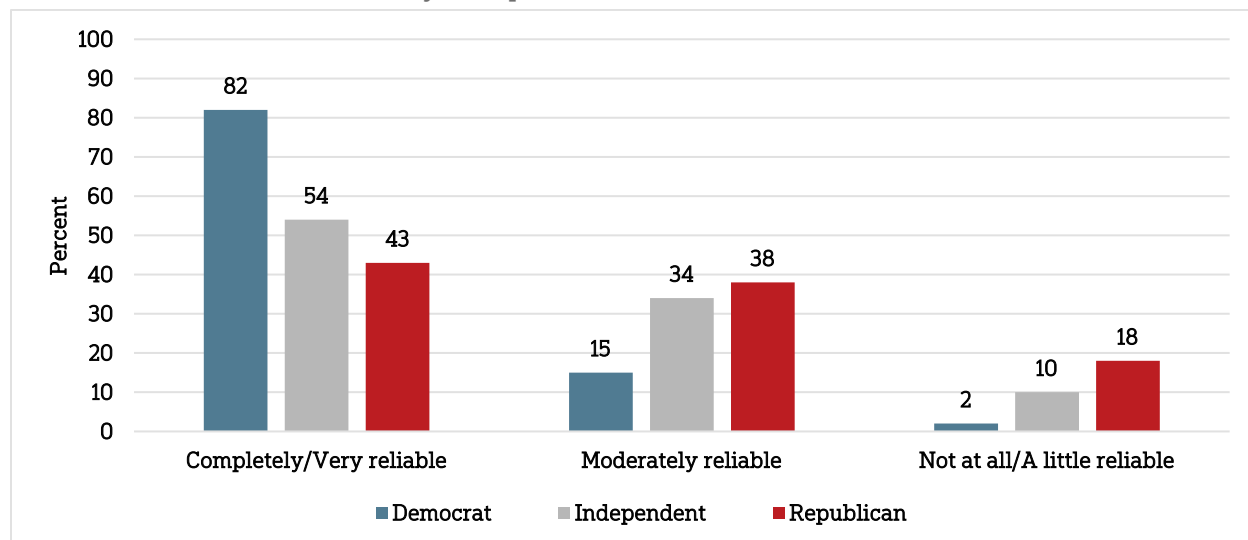


Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Though Republicans see many benefits to subscribing, a majority are at least somewhat skeptical of the reliability of their newspaper's content. Nearly all Democrats (82 percent) and more than half of independents (54 percent) say news and information from their news source is very or completely reliable, compared with just 43 percent of Republicans.

Democrats are about twice as likely as Republicans to see their source as reliable.



Question: How reliable is the news and information you get from [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

SECTION 7

PATHS TO SUBSCRIPTION: NINE COMMON JOURNEYS FROM READER TO SUBSCRIBER

When you step back and look at all the things that lead people to subscribe to a newspaper—the background factors, the specific triggers, the lifestyle conditions, and the publication characteristics—patterns emerge.

The survey asked an array of questions to get at all of this. Those multiple questions can make the results seem complicated because there is a lot to digest, but they also provide a richer profile of the consumer.

To help make sense of this robust data, we looked for patterns and connections in the answers from more than 4,100 recent subscribers. Based on this analysis, we identified nine different groups—what we call “paths to subscription.”

Some individual subscribers might fit into more than one group. But these paths offer a clear sense of different types of readers and how publishers should try to appeal to them.

The nine paths are:

1. Digital Paywall Converters
2. Topic Hunters
3. The Locally Engaged
4. Social Media-Mobile Discoverers
5. Journalism Advocates
6. Life Changers
7. Coupon Clippers
8. Print Fans
9. Friends and Family

The report describes the unique combination of factors that lead each group to subscribe and offers insights into the best ways to target readers of each path.

PATH 1



Digital Paywall Converters are people who bought a digital subscription because they hit a limit of free stories they could read online and wanted unlimited access.

Their willingness to subscribe is highly driven by seeing many interesting articles over time, as well as wanting to support local journalism.

Demographically, they stand apart in many ways—Digital Paywall Converters tend to be younger, highly educated, high-income, male, and Democrats. This group is twice as likely to subscribe to large metro papers as other subscribers.

After subscribing, they are likely to share content, and more likely than other subscribers to use the paper's mobile app and access articles through search engines.

They are more likely than other subscribers to cite the paper's excellence at covering a specific topic, and Digital Paywall Converters sometimes overlap with Topic Hunters—33 percent of Paywall Converters are also Topic Hunters.

Digital Paywall Converters include 21 percent of total respondents.

Publisher strategies for Digital Paywall Converters

While this group does overlap with other subscription paths, including Topic Hunters and Social Media-Mobile Discoverers, it warrants its own path because of the priority most newspapers place on growing digital subscriptions.

"I found myself continually hitting my max free online articles and thought it was about time to subscribe," reports one of the Digital Paywall Converters.

Much can be said about how to craft an overall strategy for digital subscriptions.⁵ But here also are a few specific, practical tactics to try.

Improving the user experience of the subscription sign-up page can lead to an increase in conversions. Examples include shortening and reorganizing the subscription order form and improving the page's eye path. For some publishers, reducing the sign-up page to simply email address and payment information provided all necessary data and led to a dramatic increase in digital subscriptions.

More and more publishers are implementing dynamic paywalls so that the meter count is customized based on an individual or segment. One publisher experienced a lift in conversions by adjusting the meter to be most restrictive around content that the reader has historically been highly engaged with.

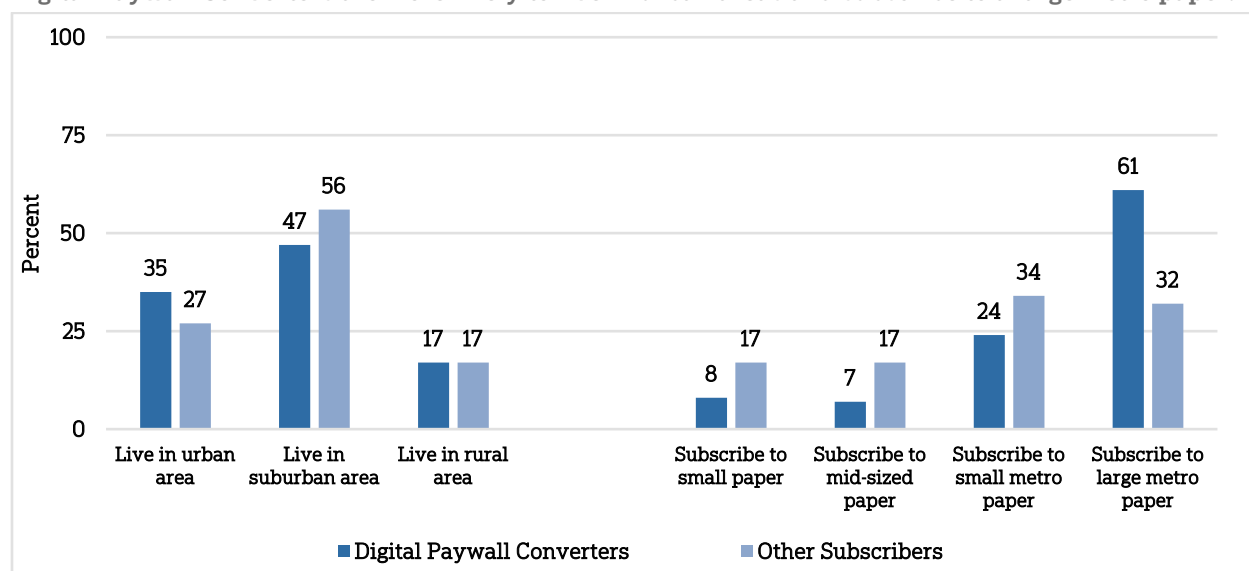
Some media companies have tested converting people who read multiple stories by the same reporter within a specified time window. These readers receive targeted messages noting that the journalist's work appears to be of interest and then points readers to a newsletter that would contain more of their work.

Some metro newspapers are experimenting with targeting ad blockers. When an ad blocker is detected, the user sees a pop-up message about the value of journalism and that it costs money. They can turn off their ad blocker, or they have to register or subscribe.

Up close: Who are the Digital Paywall Converters?

Digital Paywall Converters are more likely than other subscribers to live in urban areas and are nearly twice as likely to subscribe to a large metro newspaper.

Digital Paywall Converters are more likely to live in urban areas and subscribe to a large metro paper.



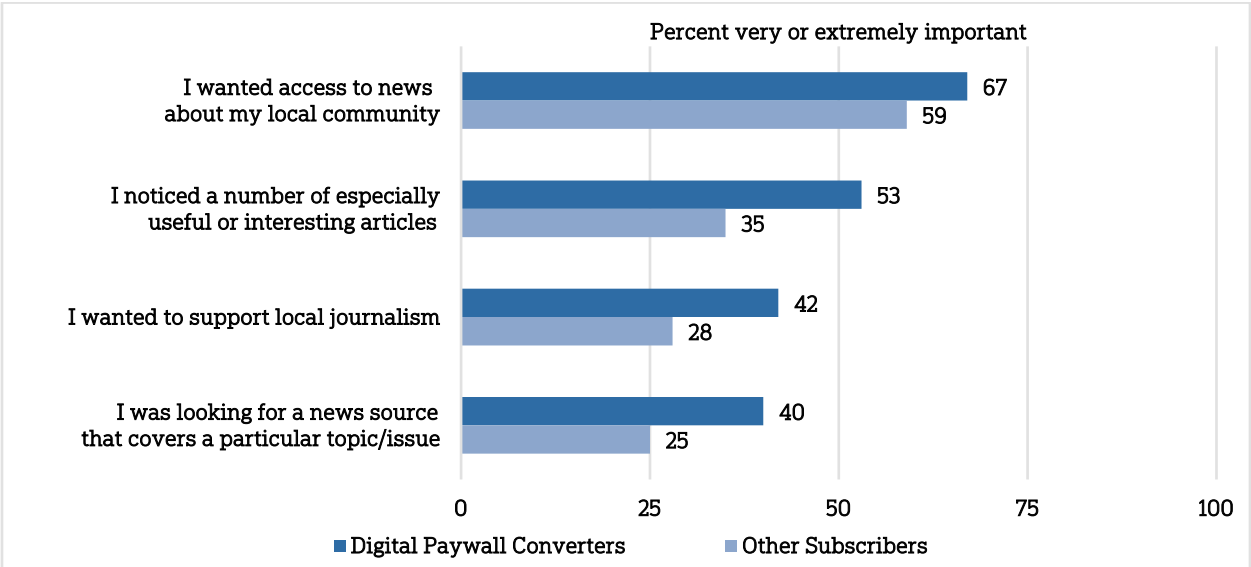
Question: Which one of the following best describes where you live?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

⁵ <https://betternews.org/topic/consumer-revenue/>

Digital Paywall Converters most often say access to local news, reading a number of interesting articles, and supporting local journalism were important to their decision to subscribe. They are also much more likely than other subscribers to mention useful articles and supporting journalism.

The most popular background factors for Digital Paywall Converters are access to local news and seeing a number of interesting articles.

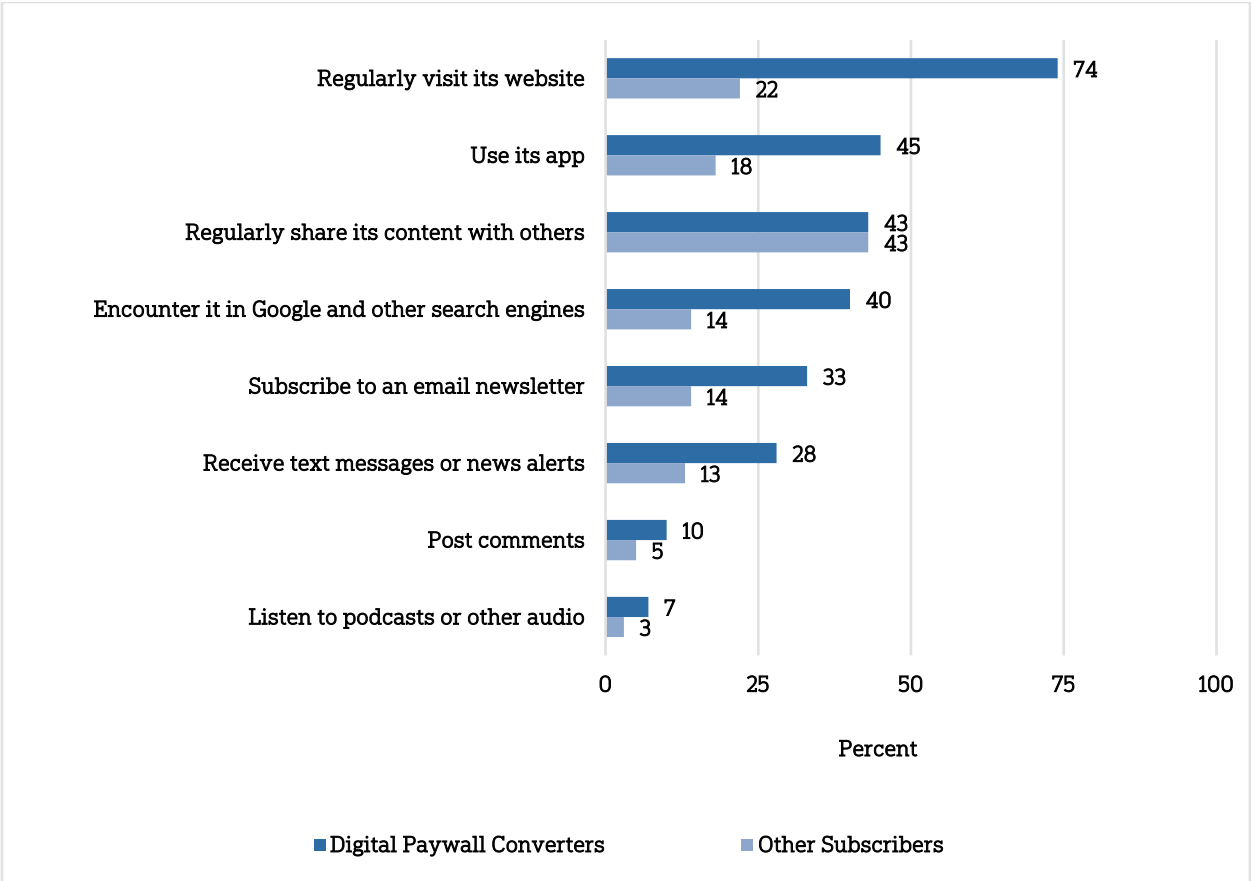


Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

What led them to take the plunge and subscribe? A majority of Digital Paywall Converters say it was reaching their article limit (61 percent). Like other subscribers, they also often subscribe due to a discount or promotion (45 percent). Another 14 percent cite being motivated by attacks on the press.

Digital Paywall Converters most commonly interact with their source as subscribers by visiting its website (74 percent), and at least 4 in 10 use its app, share its content, and encounter it in search engines. They are also much more likely than other subscribers to interact with their source digitally, including subscribing to email newsletters or news alerts.

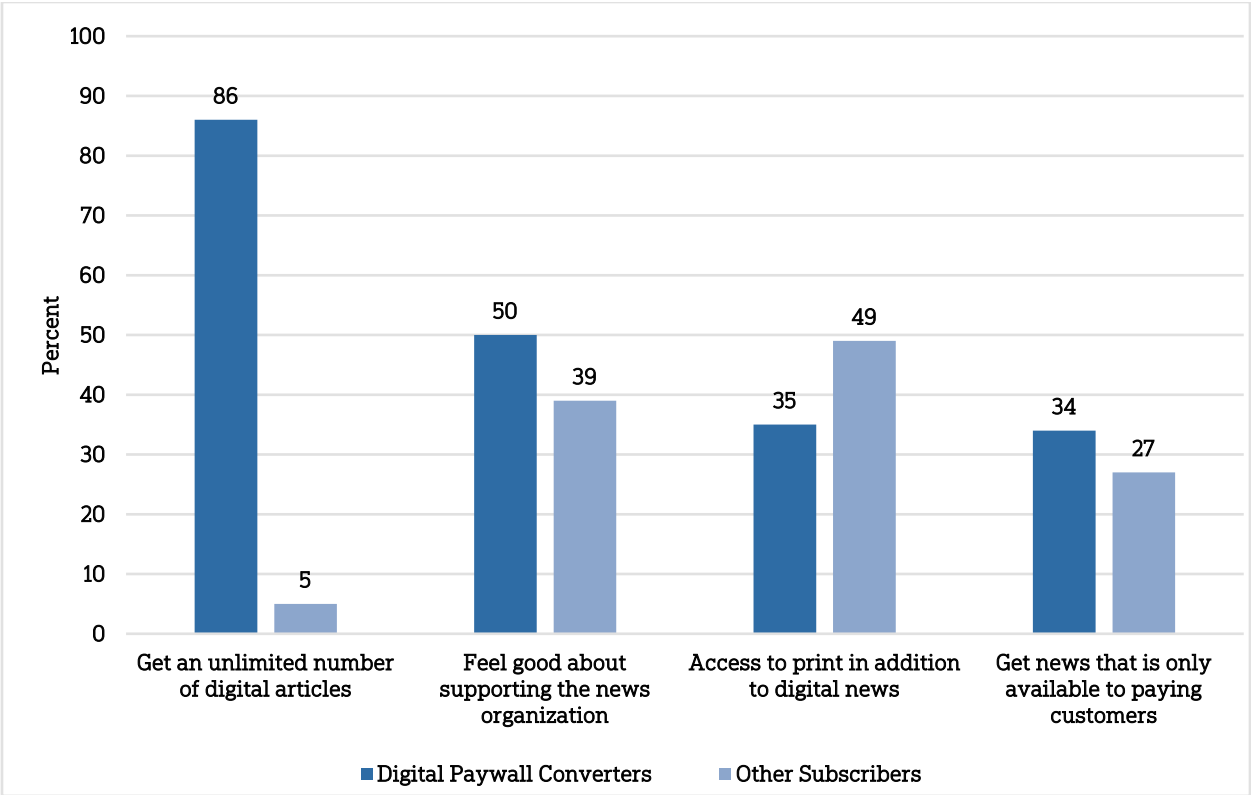
Digital Paywall Converters often interact digitally with their newspaper.



Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

What makes Digital Paywall Converters stand out is their love of digital—virtually all of them say the favorite benefit of their subscription is unlimited access to online content (86 percent). Many also cite feeling good about supporting the organization (50 percent). Digital Paywall Converters are more likely than other subscribers to mention unlimited articles and feeling good about supporting the news outlet.

Digital Paywall Converters’ most popular benefit is unlimited access to digital stories.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 2



Topic Hunters are highly interested in one or two certain subjects—such as local politics or local college or high school sports—and this interest was a major motivation for them to subscribe.

They look around for the best news available on these topics. They tend to be well educated (three-quarters have a college degree) and are more digital than average. They are also more likely than others to find content by searching online for news about these topics.

As they become engaged with coverage of a topic, they are more likely to follow individual journalists who cover this topic on social media.

They often convert to subscribing by becoming so engaged that they hit a paywall meter limit, and they are more likely than others to have encountered an article that impresses them so much they decide to subscribe. After subscribing, they are highly likely to share those stories on social media.

When asked to say in their own words why they subscribed, Topic Hunters give reasons such as the “best place for coverage of Nebraska legislature” or “to get the best coverage of the Seahawks.”

Topic Hunters include 23 percent of total respondents.

“I really liked their election coverage,” says a Topic Hunter. “They went the extra mile to interview a very high percentage of the candidates, which greatly helped me to decide who to vote for.”

Publisher strategies for Topic Hunters

There are several ways to engage with these readers based on their intense interest in specific topics, their background factors, and the triggers that lead them to subscribe.

First, Topic Hunters regularly find this content through search and follow the journalists who cover these topics. And since they tend to be more digital than other subscribers and to hit the metered paywall, the best time to convert these readers to paying subscribers is while they are online. This requires publishers to have sufficient analytics to track readers by topic. This can be done by more sophisticated systems such as API's Metrics for News.⁶

Publishers are seeing a lift in online conversions by focusing their efforts around certain topics of interest such as politics or sports. Online readers who frequently consume a particular topic of content can be shown very specific messaging in the calls-to-action within the article or through ads or emails.

The Dallas Morning News offers one example: Knowing that the engagement on high school sports stories was high, the paper set a four-day meter (as opposed to an article-counting meter) for that content, and the user is stopped after visiting four different days. On a user's first visit to a high school sports page, they received a message asking them to provide their email address to keep them updated with new content. *The News* gathered more than 10,000 email addresses in less than a month and then quickly spun up a high school football newsletter called "The Fifth Down." The newsletter has a 27 percent click-through rate, and high school coverage generated more subscriptions in a three-month period in the fall than the rest of the site combined.

In another example, *The Houston Chronicle* tried something uniquely local—a "BBQ Nation" newsletter and a podcast called "BBQ State of Mind."

The New York Times offers newsletters and alerts tailored to subjects such as recipes and running, for example. These newsletters are an effective way to engage readers around their interest areas and can lead to paid subscriptions.

Philadelphia-based digital startup "Billy Penn" lets readers sign up for news around Philly's soda tax⁷ or Philly beer⁸, which may find readers particularly motivated to follow certain news and allow useful data for later subscription or events appeals.

Journalists can also exhibit their subject expertise using social media to engage readers and build a following among those interested in their beats.

And publishers can hold events related to certain topics that potential subscribers engage with. *The Business Journals* (in cities around the country) sponsor regular "After Hours" events described as a way to meet a particular reporter covering a significant topic in the community. The events are free but usually sponsored by a local business.

Up close: Who are the Topic Hunters?

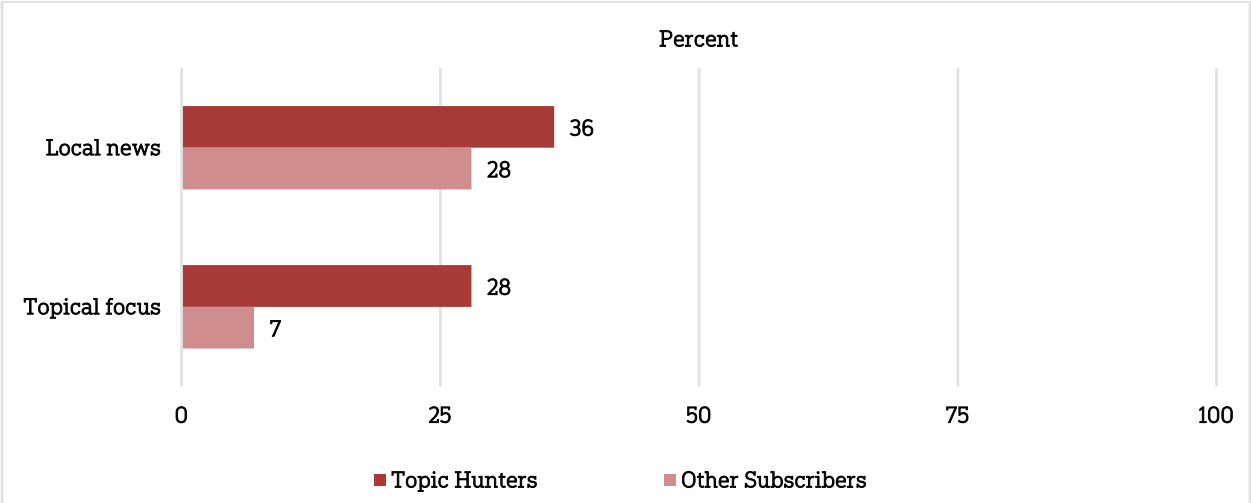
When asked in their own words what led them to subscribe, Topic Hunters most frequently mention local news and a topical focus.

⁶ <https://www.metricsfornews.com/>

⁷ <https://billypenn.com/stories/phillys-soda-tax/>

⁸ <https://billypenn.com/stories/philly-beer/>

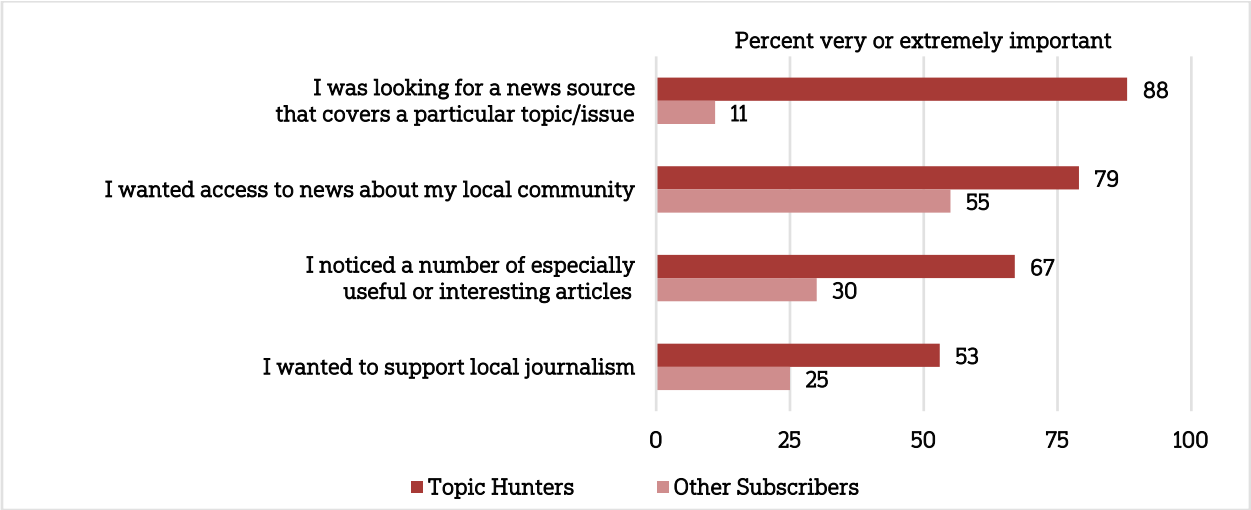
Topic Hunters are most likely to say they subscribed for local news and focused coverage of a particular topic.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

When thinking about what was important to their decision to describe, Topic Hunters most often cite topic/issue coverage (88 percent). They also commonly cite access to local news, seeing a number of useful articles, and supporting local journalism as important to them. Topic Hunters are at least 20 percentage points more likely than other subscribers to say each of these reasons were key factors.

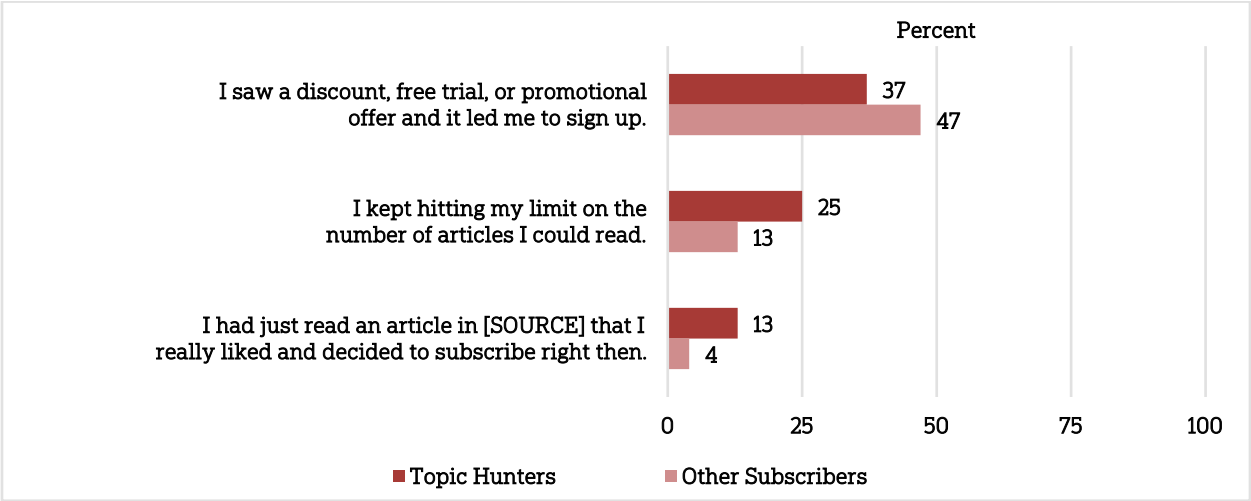
The most important background factors for Topic Hunters are topic/issue coverage, coverage of local news, useful articles, and support for local journalism.



Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

The most popular trigger for Topic Hunters to finally subscribe is seeing a discount or promotional offer, though less than other subscribers. They are particularly likely compared to other subscribers to cite hitting an article limit and having just read an interesting and useful article.

For Topic Hunters, some of the biggest triggers are seeing a discount, hitting an article limit, or having just read an article.

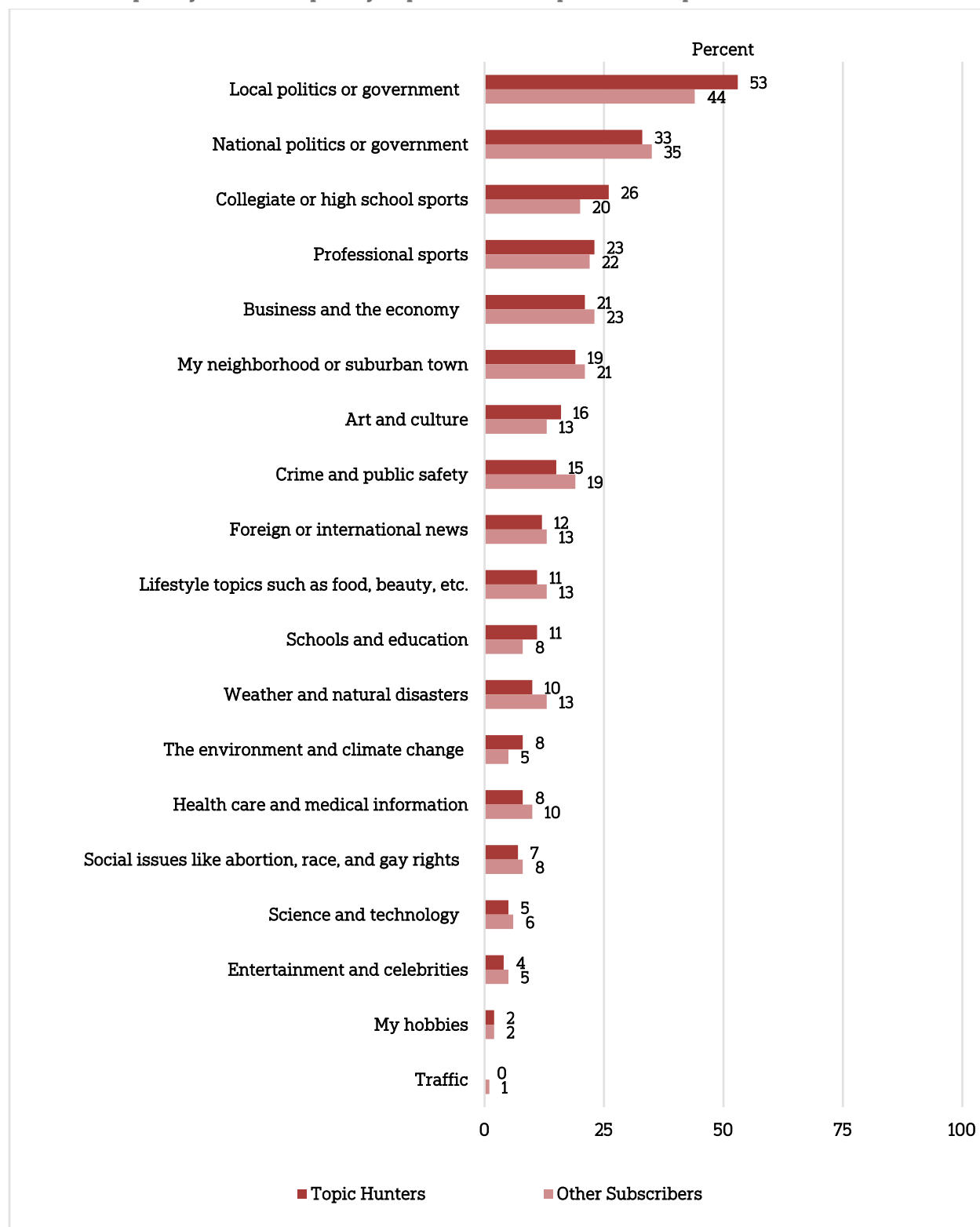


Question: While people may be thinking about subscribing to a news source for a while, there can be a specific moment or reason that serves as a tipping point when someone makes the decision to subscribe. Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Topic Hunters are not very different from other subscribers in what topics they follow, but they distinguish themselves in how interested and engaged they are with content. Topic Hunters also largely follow hard news topics, but some are sports fans, seeking out coverage on collegiate and high school sports.

The most frequently followed topics by Topic Hunters are local politics (53 percent), national politics (33 percent), college or high school sports (26 percent), and business and the economy (21 percent).

The most frequently followed topics by Topic Hunters are politics and sports.



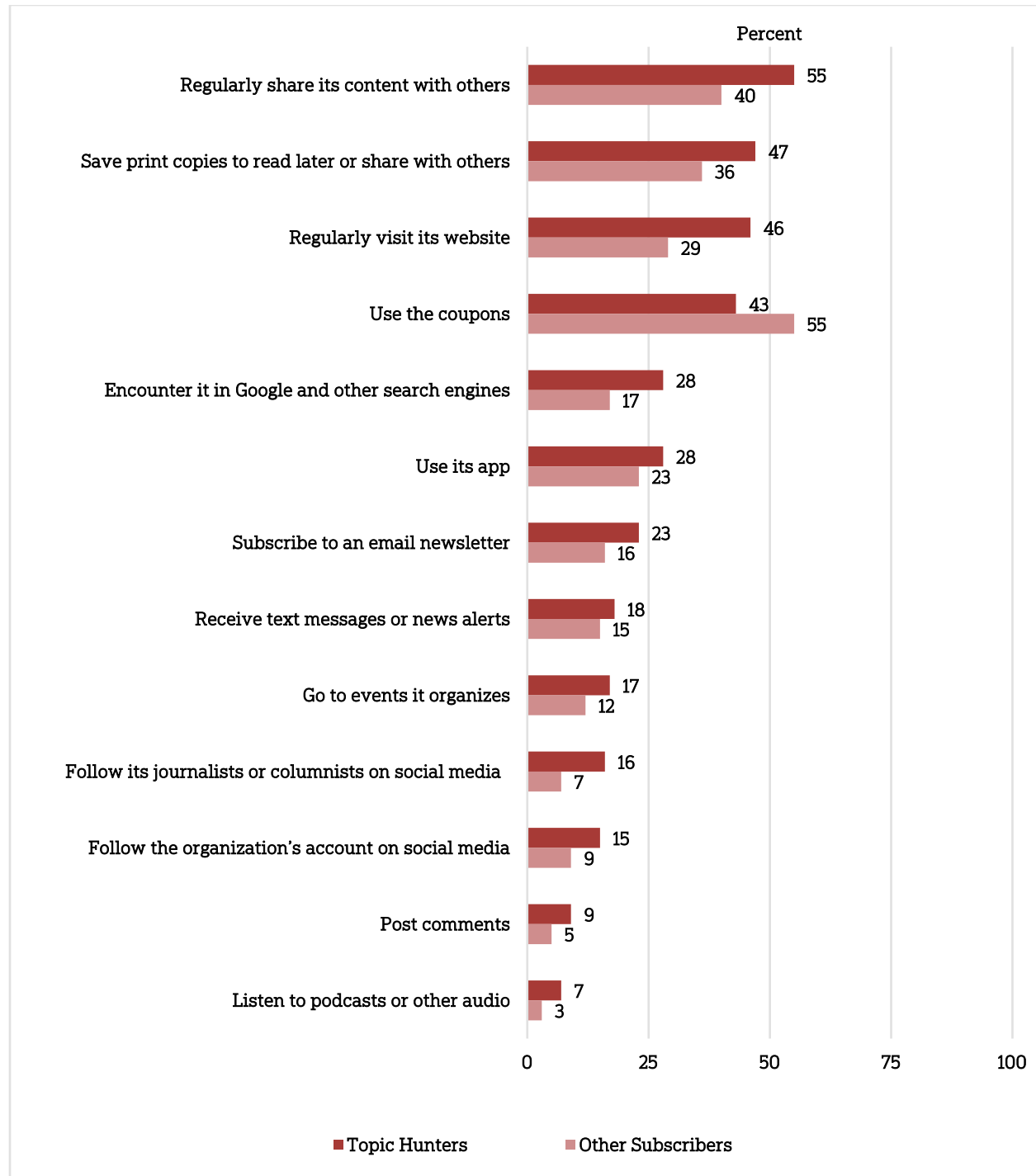
Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Topic Hunters are engaged with and promote their publication, with a majority saying they share its content (55 percent) and many who save print copies (47 percent) and visit the paper's website (46 percent). They are more likely than other subscribers to do each of these things.

However, Topic Hunters are focused on the news itself with little use for the extras; they are less likely than other subscribers, for instance, to use coupons (43 percent vs. 55 percent).

Topic Hunters often share content, save print copies, and visit their source's website.

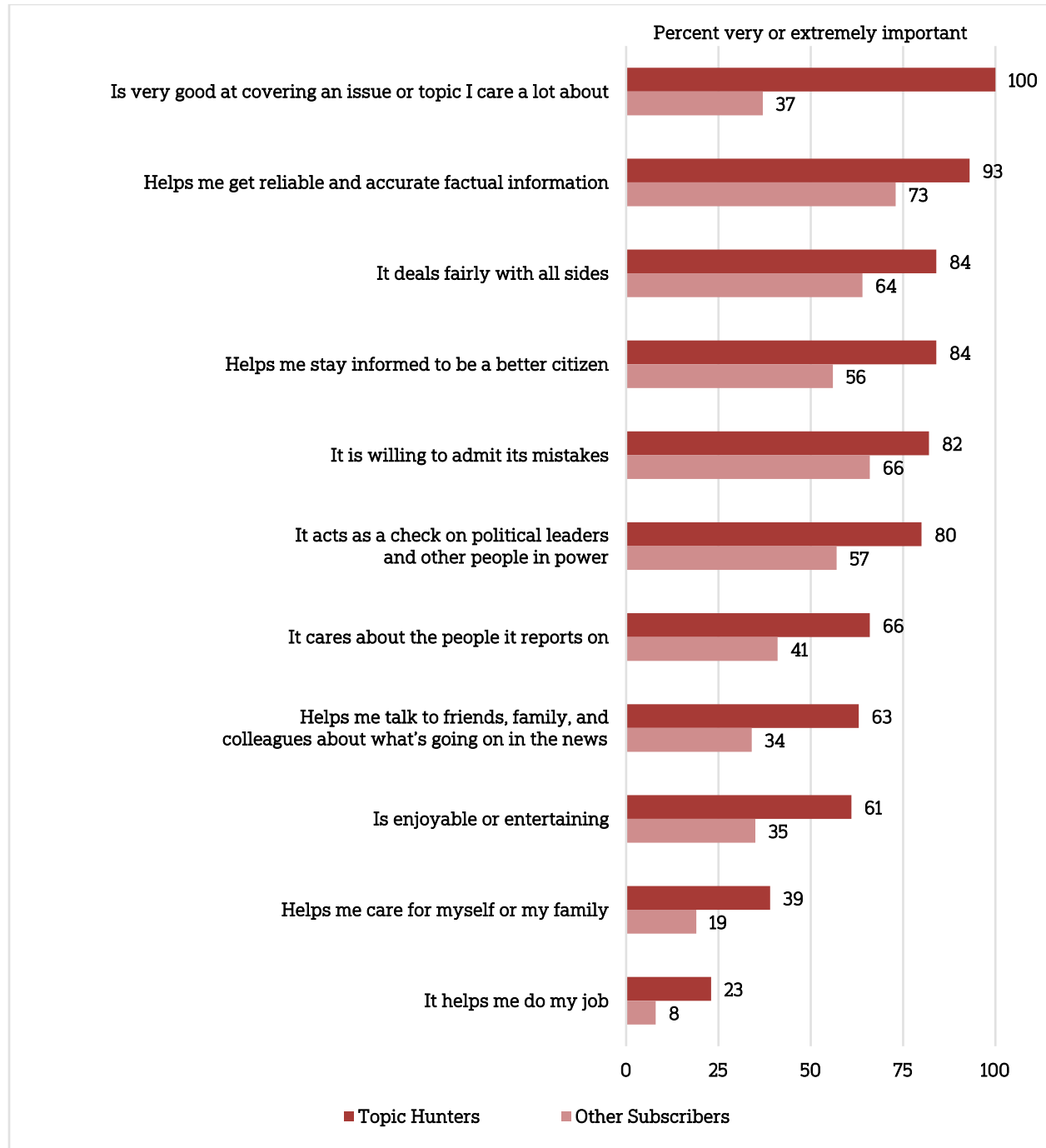


Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

While Topic Hunters rely on the publication they've subscribed to because it is good at covering a topic, they also value that it helps them get reliable/accurate information (93 percent), deals fairly with all sides (84 percent), and helps them stay an informed citizen (84 percent). Topic Hunters also tend to cite more reasons they use their newspaper than other subscribers.

Topic Hunters cite many reasons for using their paper.



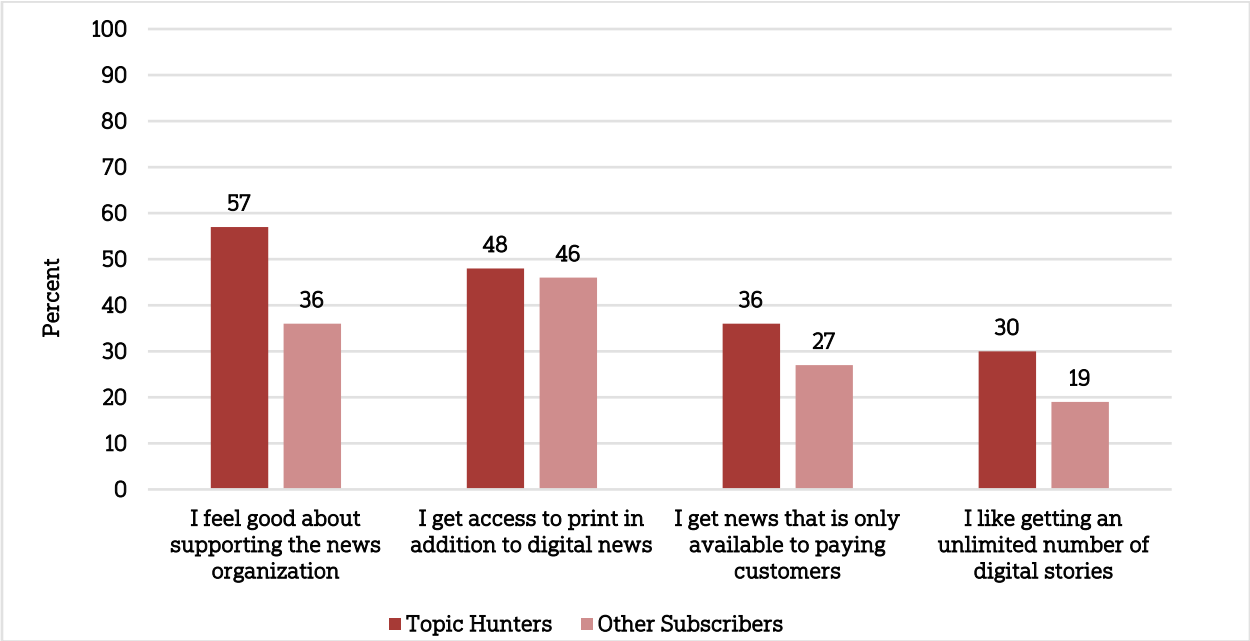
Question: People use news for many reasons. When it comes to the biggest reasons you use [NAME OF NEWSPAPER], how important to you is it that it...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Topic Hunters’ favorite benefits of their subscription are feeling good about supporting the organization, having access to print as well as digital content, and getting news only available to paying customers.

Topic Hunters cite satisfaction from supporting journalism as a perk much more frequently than other subscribers (57 percent vs. 36 percent).

Topic Hunters’ top benefits are feeling good about supporting the organization and access to both print and digital content.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 3



The Locally Engaged are a group keenly interested in content about the community and its institutions, and they want to be engaged and informed locally.

They say that access to local news is a major reason they wanted a subscription to the paper, and they closely follow news about local politics or their immediate town or neighborhood.

Notably, their subscription decisions are less likely to be affected by a promotion or discount, or by access to coupons. These people are “news junkies,” especially about where they live, and want the news regardless of whether a temporary price break is available.

They have some overlap with the Life Changers path. They are more commonly found at small or medium-sized papers compared to other subscribers.

This group devours local politics coverage and is particularly likely to value journalism as a check on leaders’ power.

When asked why they subscribed, the Locally Engaged provide answers such as “I value local news” or “I always subscribe to a local newspaper so I can be up to date on local news.”

The Locally Engaged include 18 percent of total respondents.

“It has all the local news and special events for the immediate area, plus good deals for free or discounted food in area restaurants,” says a Locally Engaged subscriber.

Publisher strategies for the Locally Engaged

These subscribers are energized by coverage of their local communities, especially local politics, and their local newspaper may be the only place to get reliable, accurate coverage.

In a way similar to Topic Hunters, these local news followers would benefit from news alerts and email newsletters around the topics that most resonate with them, which in their case are local government, neighborhood, and other local civic topics.

Publishers of metro news organizations are uniquely positioned to deliver the local content that interests these subscribers. There are a number of steps publishers should consider here.

Publishers can create and deploy email newsletters and alerts around local topics to engage readers who can then convert to paying subscribers.

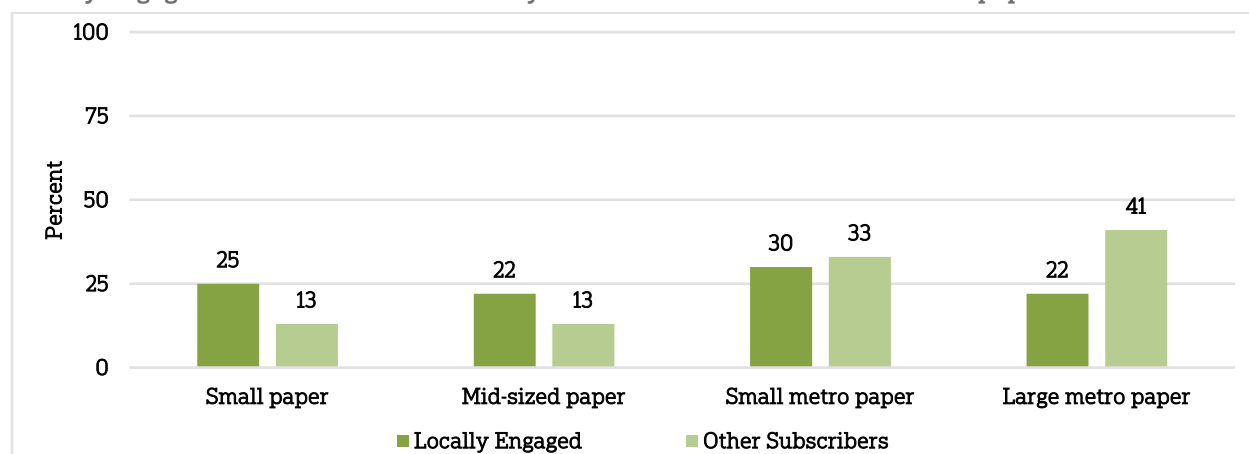
And publishers could seek partnerships with local organizations such as businesses, service organizations, and nonprofits. The Locally Engaged are invested in the civic life of their community, and we would guess they are likely to be members, volunteers, activists, and supporters of other civic-minded organizations.

Some newspapers are partnering with local businesses and universities to create bulk subscription packages. Many newspapers have set up successful institutional sales programs and work with local colleges and universities to provide copies of the newspaper on campus, as well as providing online access for the students and faculty. This is an efficient and profitable way for the publisher to reach many readers through a single subscription.

Up close: Who are the Locally Engaged?

Nearly half of the Locally Engaged subscribe to a small or medium-sized paper. The Locally Engaged are an especially important path for smaller publications.

Locally Engaged subscribers are more likely to subscribe to small and mid-sized papers.



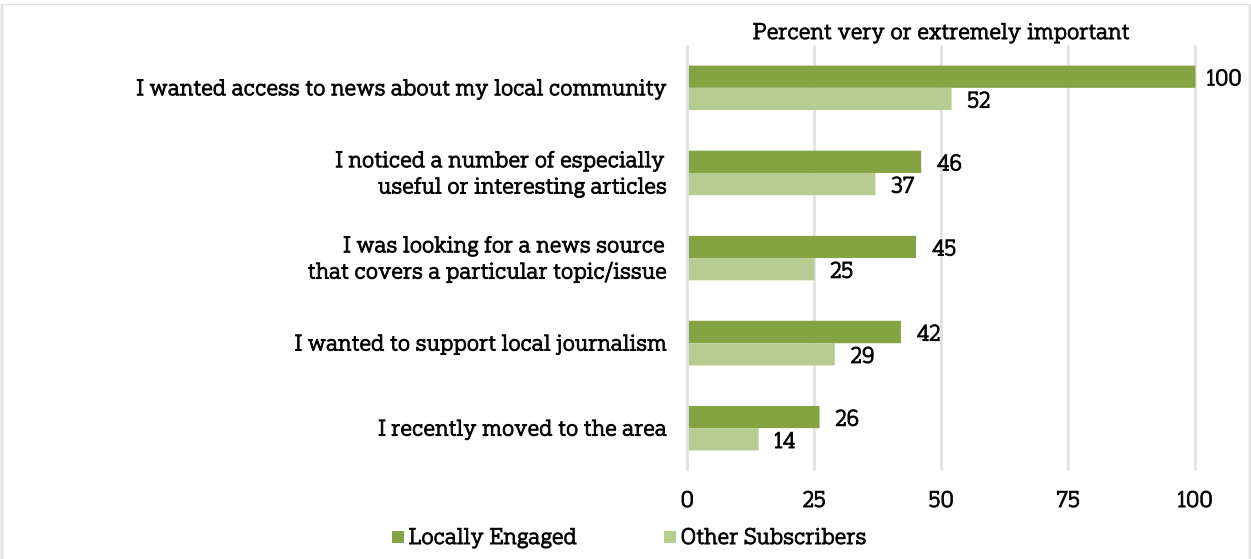
Small papers include those with circulation between 0-50,000, mid-size papers include those with circulation between 50,001 and 99,000, small metro papers include those between 100,000 and 199,999, and large metro papers include those with 200,000 or more.

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Locally Engaged subscribers all cite access to local news as important to their decision to subscribe. Four in 10 also say a number of interesting articles, topic coverage, and wanting to support local journalism were important.

They are also more likely than other subscribers to mention wanting access to local news, recently moving to the area, or seeing many interesting articles as background factors.

Locally Engaged cite a number of important factors when considering subscribing.

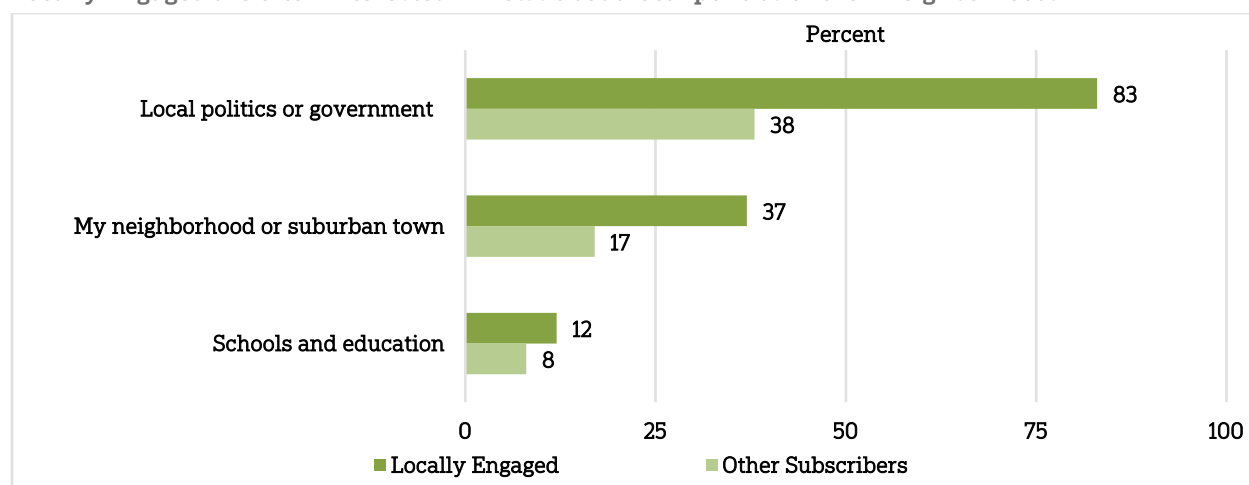


Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

There are certain topics that move the Locally Engaged—especially local politics, neighborhood news, and schools and education.

Particularly for smaller papers, these should be subjects on which to build intellectual leadership, experiment, and involve the community in audience-centered newsgathering methods such as active listening, events, and more. That can become the core of a business approach that then is expressed through analytics and marketing.

Locally Engaged are often interested in news about local politics or their neighborhood.

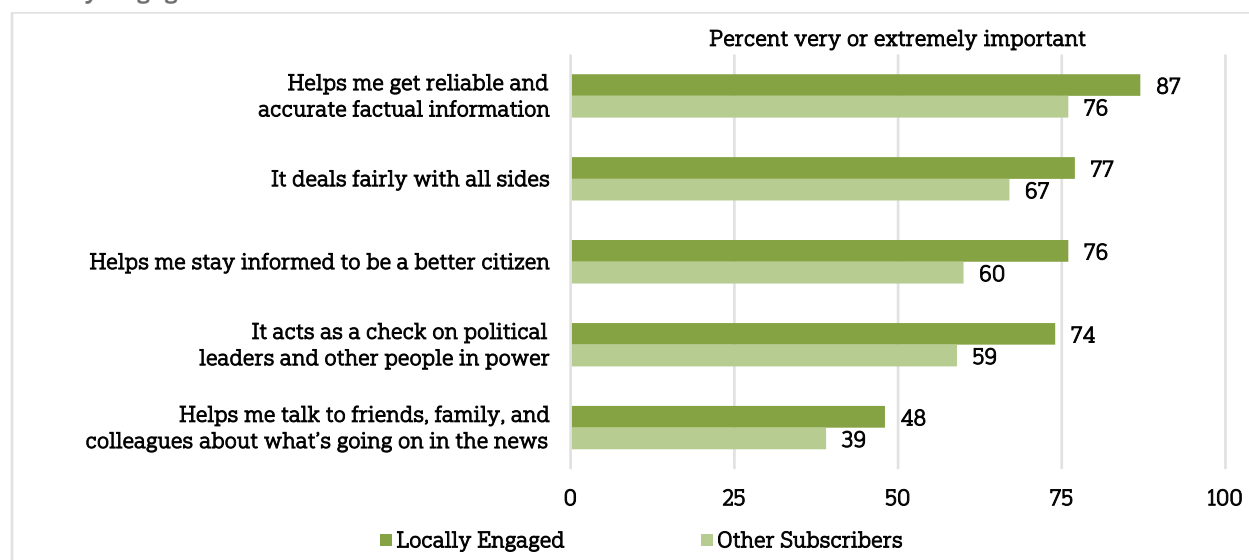


Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

For the Locally Engaged, quality is critical. They are more likely than other subscribers to value the accuracy and reliability of the paper, its willingness to admit mistakes, and its being a check on people in power.

Locally Engaged subscribers value reliable and accurate information.



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

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 4



Social Media-Mobile Discoverers are subscribers who engage with the newspaper and its journalists on social media and read the paper on mobile devices.

They get news on a cell phone often and use social media often, and they also interact with the newspaper through news alerts, following it or its journalists on social media, or by sharing content.

They become persuaded to subscribe as they appreciate the local news coverage and are impressed by particular news articles, and they feel strongly about wanting to support the local journalism.

The final trigger for getting them to subscribe, as it is for others, is often a discount or promotion. This group is also somewhat paywall-motivated—25 percent were triggered by hitting a meter limit, and 35 percent say a key benefit of subscribing is the unlimited digital stories.

Social Media-Mobile Discoverers are more digital-minded than other subscribers, but still are heavy users of print as well. This group is much younger than others, and tends to be slightly more female and more likely to identify as a Democrat. They are particularly likely to value talking about news with family and friends, using it to help take care of themselves or their family, and helping them be a better-informed citizen.

When asked why they subscribed, many in this group give reasons such as “I would often click links that I discovered on my Facebook feed” or “enjoying the easy online access.”

Social Media-Mobile Discoverers include 19 percent of total respondents.

Publisher strategies for Social Media-Mobile Discoverers

The Social Media-Mobile Discoverers group is an important one and may be underappreciated by some publishers.

The data makes very clear that mobile and social are both important paths by which potential new subscribers discover publications—especially younger readers.

One implication of this is that publishers need to have a clear and aggressive strategy of putting their best content on social media platforms.

The Social Media-Mobile Discoverers are likely to follow individual reporters on Twitter, Facebook, and Instagram. That means publishers should be tracking that data as well and delivering messages encouraging readers to like, follow, share, and eventually subscribe.

There are a few instances of publishers effectively using Facebook to engage their readers. In one example, editorial staff respond to individual comments on Facebook, and the customer care teams also respond to questions and complaints that are broadcast on social media. In another example, publishers are creating Facebook groups about specific topics or that are exclusive for subscribers.

One question for publishers is whether to relax their paywall or meter for the Social Media-Mobile Discoverers. It can be particularly frustrating if someone shares an article, but their friends cannot then read it. Chances are, if it is a hard paywall, those friends won't try to access that publication a second time. Those potential readers are now a lost opportunity.

So when a user arrives from social media, publishers may want to be more lenient with their meter. Interestingly, once the meter count is exceeded, these social media-referred readers convert to paid subscribers at rates similar to others.

This group also indicates that publishers need to be sure their content presents well on mobile devices.⁹

Up close: Who are the Social Media-Mobile Discoverers?

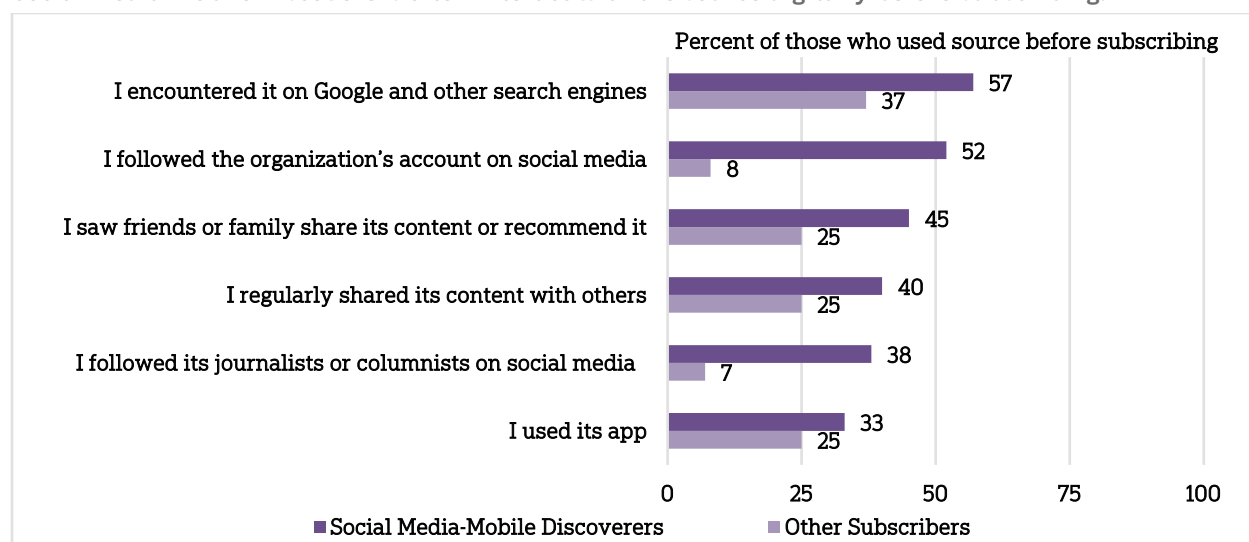
Social Media-Mobile Discoverers tend to be slightly more female than other subscribers (53 percent vs. 46 percent), and they are much younger (51 percent are under the age of 60 vs. 28 percent of other subscribers). They are also more likely than other subscribers to be Democrats (58 percent vs. 48 percent).

They are more likely to prefer digital content than other subscribers (36 percent vs. 23 percent), though the majority of Social Media-Mobile Discoverers still prefer print (60 percent).

Among Social Media-Mobile Discoverers who used their paper before they started to pay for it, half used it for more than a year. They most frequently visited its website, followed the organization on social media, and encountered it on a search engine, all of which they did more often than other subscribers. Compared to other subscribers, they are also particularly likely to have shared its content with others and follow its journalists on social.

"I was reading articles online from following them on social media and enjoying them," says one Social Media-Mobile Discoverer. "I also started listening to their podcast."

⁹ <https://betternews.org/topic/mobile/>

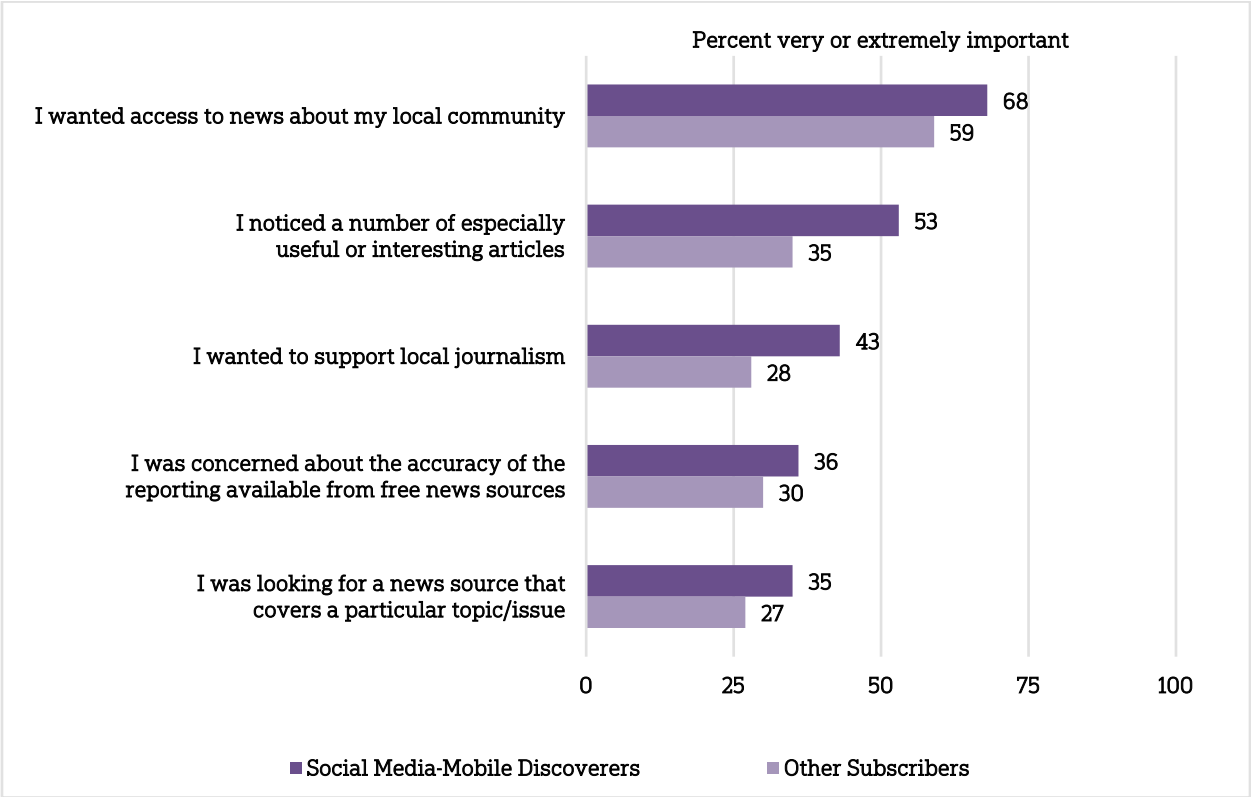
Social Media-Mobile Discoverers often interact with the source digitally before subscribing.

Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

As for background factors that were important to their decision to subscribe, many Social Media-Mobile Discoverers say it was important that they were looking for local news (68 percent), that they saw a number of interesting articles (53 percent), and that they wanted to support local journalism (43 percent). They are more likely than other subscribers to cite all three of these factors as important when considering subscribing.

The most popular background factors for Social Media-Mobile Discoverers are local news access and a number of interesting articles.

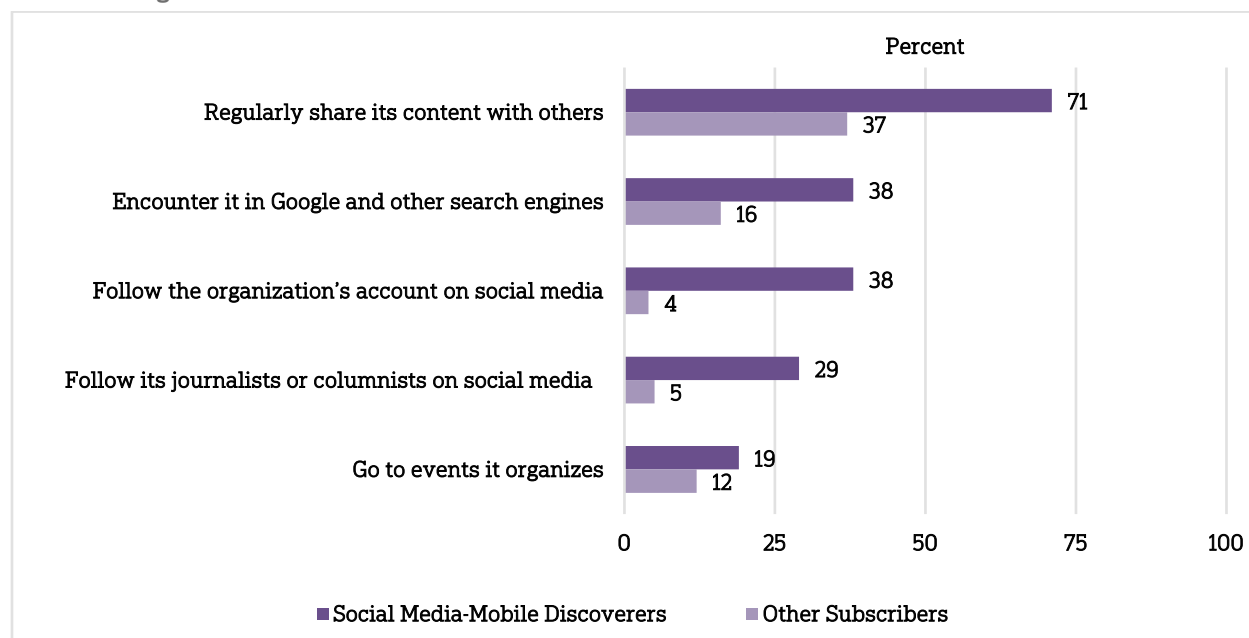


Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

When it comes to the specific trigger to subscribe, Social Media-Mobile Discoverers most often mention a discount or promotion (47 percent), but they also cite that they kept hitting an article limit (25 percent) and that they wanted coupons (20 percent). They are more likely than other subscribers to mention hitting an article limit.

Once they subscribe, the Social Media-Mobile Discoverers are almost twice as likely as others to share content with friends. They are also far more likely to seek out content in search, follow a news organization in social media, and go to events. In short, these subscribers can become marketers for a publication, who then bring additional subscribers as well.

Common ways Social Media-Mobile Discoverers interact with their source are sharing content and encountering it in search.

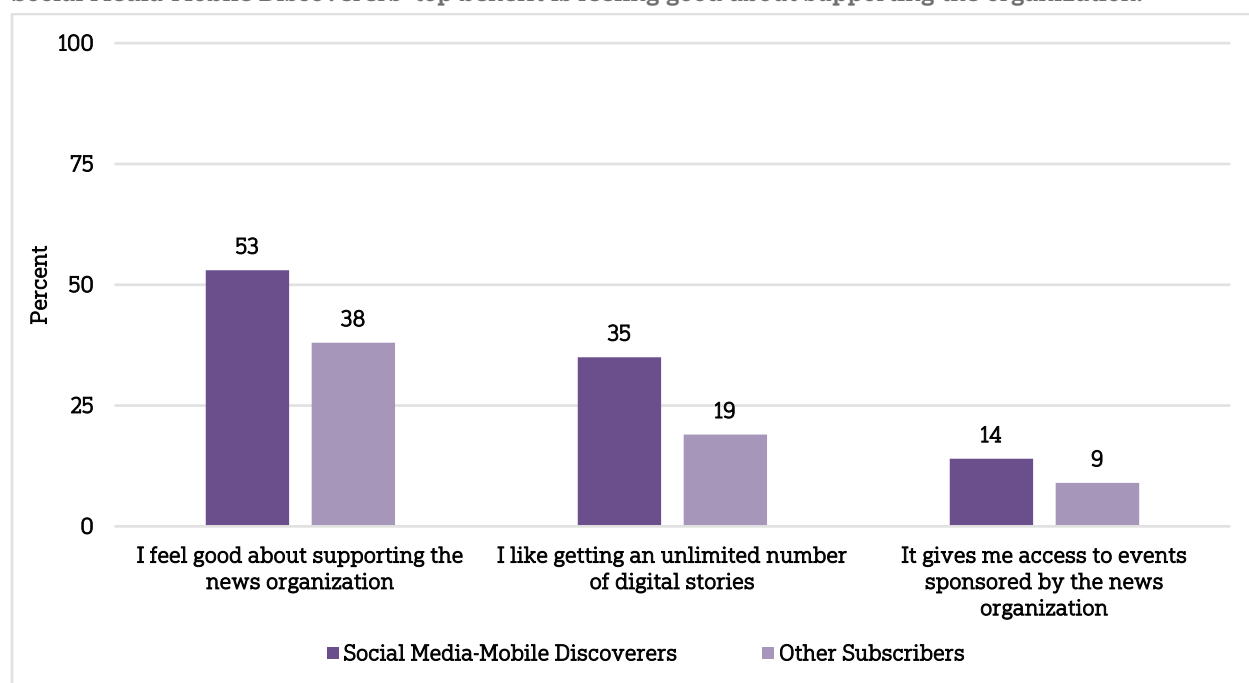


Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Social Media-Mobile Discoverers are also more likely to say their favorite benefits of subscribing are that they feel good about supporting the organization, get access to events, and get access to unlimited digital stories.

Social Media-Mobile Discoverers' top benefit is feeling good about supporting the organization.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 5



Journalism Advocates are motivated by wanting to support journalism, and for many, their immediate trigger to subscribe was either a concern about verbal attacks on the press or a response to messaging about quality journalism.

Many Journalism Advocates rated their paper as reliable, noted the paper's accuracy, and cited concerns about accuracy of other sources. These subscribers' concerns about quality outranked incentives related to promotions or discounts. Nearly all of them say they value supporting the news organization and like that it acts as a check on political leaders.

Journalism Advocates say the biggest reasons they use the newspaper are to get reliable and factual information, it helps them stay informed and be better citizens, it deals with all sides fairly, and it is willing to admit its mistakes.

This group is younger and more digital-focused than others, but still more often than not prefers print. Perhaps for that reason, they share some primary characteristics of the Topic Hunters, notably that they are twice as likely as other subscribers to cite a number of interesting articles and news about a particular topic as reasons they subscribed. And 1 in 5 Journalism Advocates say they were triggered to subscribe by hitting a paywall meter limit.

Journalism Advocates are likely to identify as a Democrat and are highly educated. They are more likely than other groups to live in urban areas and more likely to subscribe to large metro papers. Journalism Advocates are more likely than others to follow local politics and national politics.

When asked why they subscribed, Journalism Advocates provide responses such as "to support truth in journalism" or "it is a trustworthy source of news and needs to be supported for it to continue."

Journalism Advocates include 24 percent of total respondents.

Publisher strategies for Journalism Advocates

This group may initially be seen as a backlash to verbal attacks against the media, unique to this moment. However, they are not exclusively that—the Journalism Advocates are more likely to follow the newspaper’s coverage of local politics and government than national politics and government.

“I think it’s important that we support our news organizations, both local and national, in order to maintain strong and unbiased news sources,” says a Journalism Advocate.

This group skews digital in their preferences and consumption, and because they also value unlimited access to content, this subscriber path also aligns with the Digital Paywall Converters.

Publishers can take advantage of verbal attacks on the press. At those moments, these Journalism Advocates are going to be most receptive to messaging and subscription prompts. Engaging these readers with news alerts and email newsletters that can be read and shared also can lead to subscriptions.

Some examples of these appeals can be seen in the nonprofit news landscape. Mother Jones, for instance, has used long-form essays about the process of journalism and the state of the news industry¹⁰ in its appeals for reader support. *The Texas Tribune* is an example of a local nonprofit news organization that has made shorter appeals¹¹ speaking to similar themes of journalism’s importance and the resources it demands.

Bklyner, a hyperlocal for-profit news site in New York, is an extreme example of this approach: Faced with closure, they made an open and honest appeal that they needed reader revenue to stay open and continue their journalism. It worked.¹²

Up close: Who are the Journalism Advocates?

Journalism Advocates tend to be Democrats, younger, and more educated than other subscribers.

In our sample, 72 percent identified themselves as Democrats. They are more likely than other subscribers to have a college degree (76 percent vs. 64 percent) and are slightly younger (40 percent under age 60 vs. 30 percent). However, they resemble other subscribers in their racial and ethnic makeup, as well as their income distribution.

Journalism Advocates are particularly likely compared to other subscribers to have seen friends or family share content from the source (41 percent vs. 26 percent), share content from it themselves (38 percent vs. 26 percent), and to follow the organization on social media (27 percent vs. 18 percent) or its journalists on social media (22 percent vs. 13 percent).

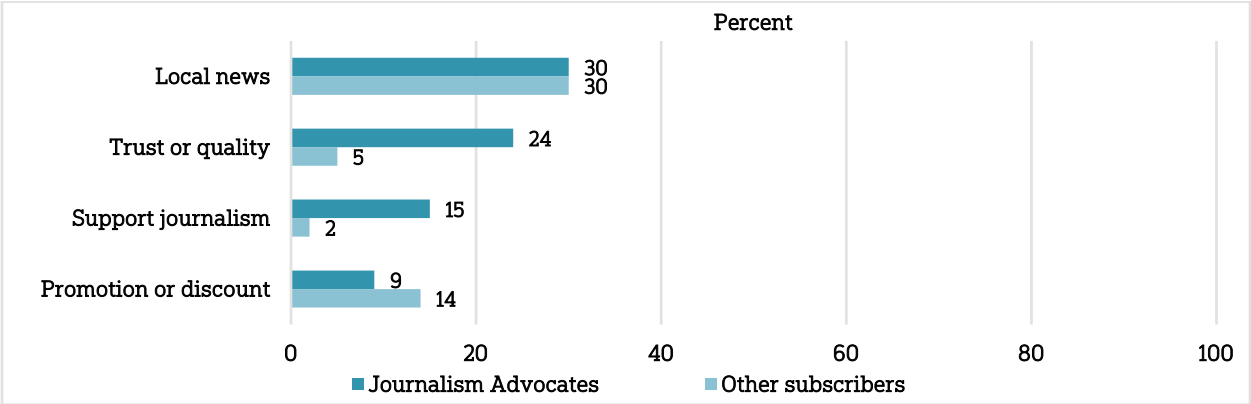
Trust and quality are major concerns for Journalism Advocates, and they are attracted to subscribing for accurate information and to support journalism. This group is especially likely compared to other subscribers to cite both trust/quality and wanting to support journalism. They are less likely than other subscribers to mention a promotion or discount on the subscription or a particular topical focus.

¹⁰ <http://www.niemanlab.org/2017/12/to-make-fundraising-appeals-more-appealing-mother-jones-turns-them-into-stories-readers-want-to-read/>

¹¹ <https://us3.campaign-archive.com/?u=3d0ce87edeeb6df90043897db&id=c6d488eb9c&e=6528d0a39e>

¹² <https://www.poynter.org/news/near-closing-local-site-asked-people-pay-their-news-and-they-did>

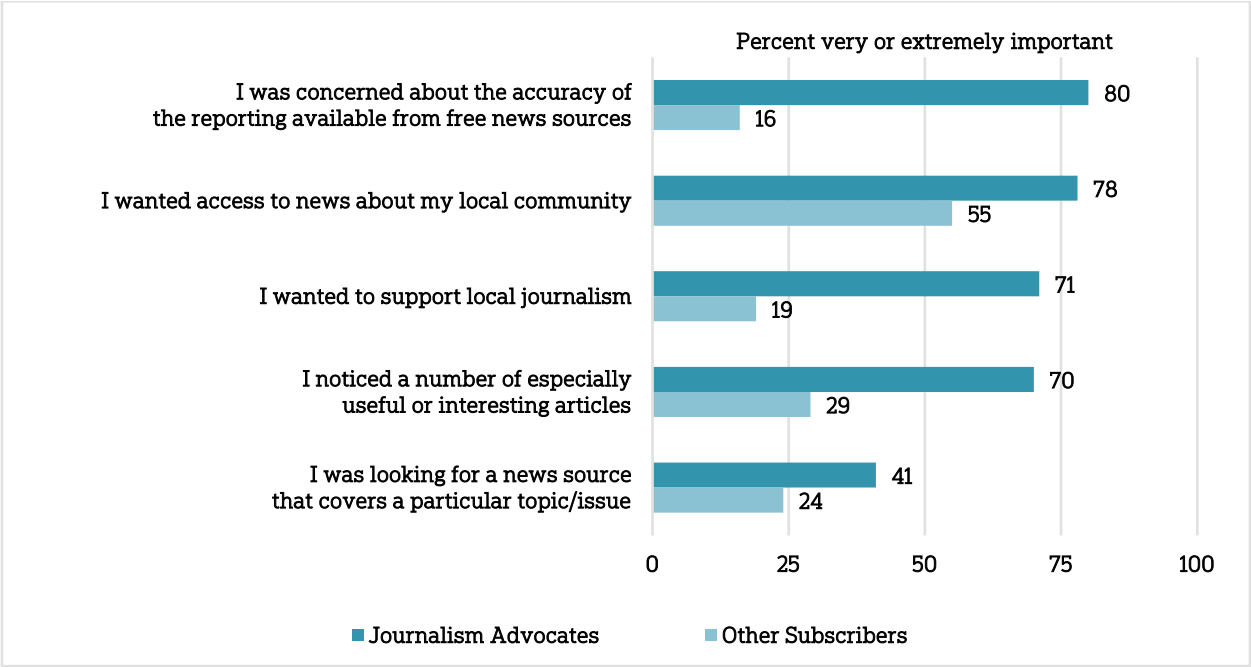
Journalism Advocates mention local news and trust/quality most frequently as the reason they subscribed.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Journalism Advocates most often cite four main background factors in their decision to subscribe—concerns about the accuracy of reporting in free news sources, wanting access to local news, wanting to support local journalism, and noticing a number of useful or interesting articles in the paper. They were more likely than other subscribers to cite each of these factors as important.

Worries about the accuracy of free sources is an important reason many Journalism Advocates subscribed.



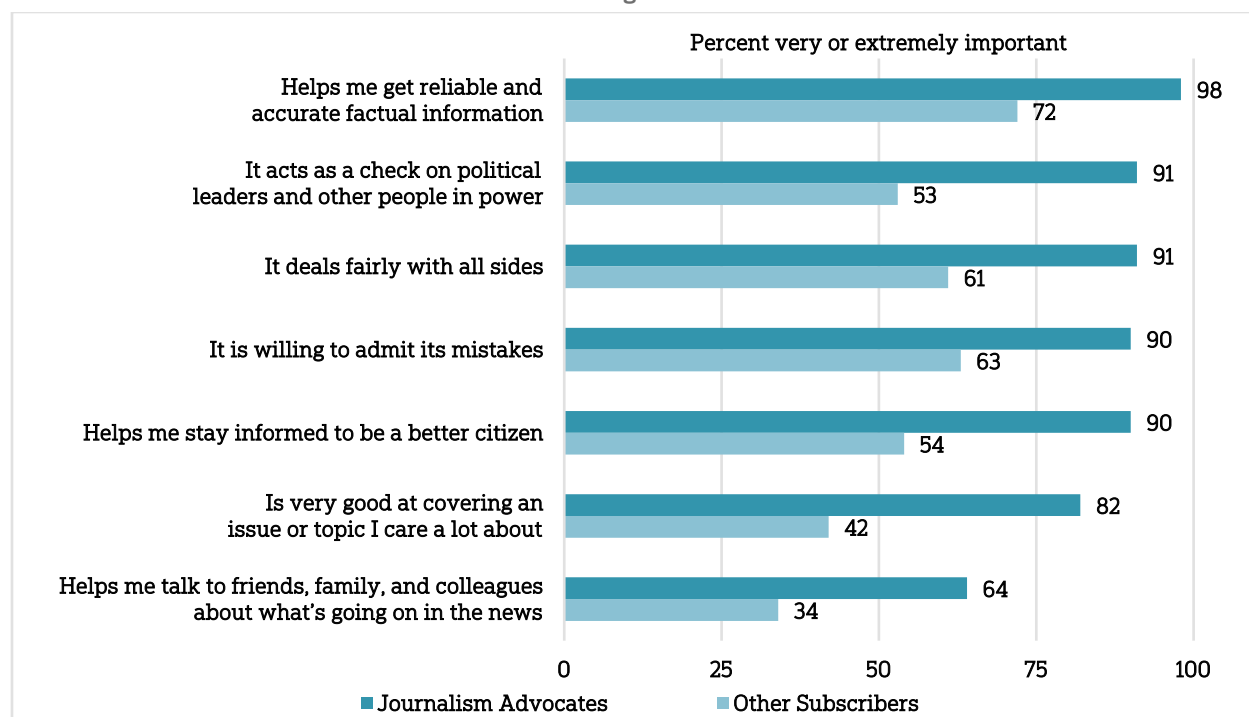
Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

When it comes to what triggered them to subscribe, Journalism Advocates most often mention a discount or promotion, but they do so less often than other subscribers (40 percent vs. 46 percent). But Journalism Advocates are much more likely than other subscribers to mention they were triggered by attacks on the news media (25 percent vs. 2 percent) and seeing messaging about supporting local journalism (23 percent vs. 1 percent).

As far as topics of interest, Journalism Advocates most closely follow local politics (57 percent) and national politics (48 percent), and they are more likely to follow these two topics than other subscribers. They are less likely than other subscribers to say they follow high school, college, or professional sports, crime, or weather.

Journalism Advocates value many aspects of their paper and say several factors are important to their decision to use the paper. In particular, they say that it helps them get reliable and accurate information, it acts as a check on political leaders and those in power, it deals fairly with all sides, and that it helps them be an informed citizen. For each of these factors, Journalism Advocates are significantly more likely than other subscribers to cite them as important.

What Journalism Advocates value after subscribing.

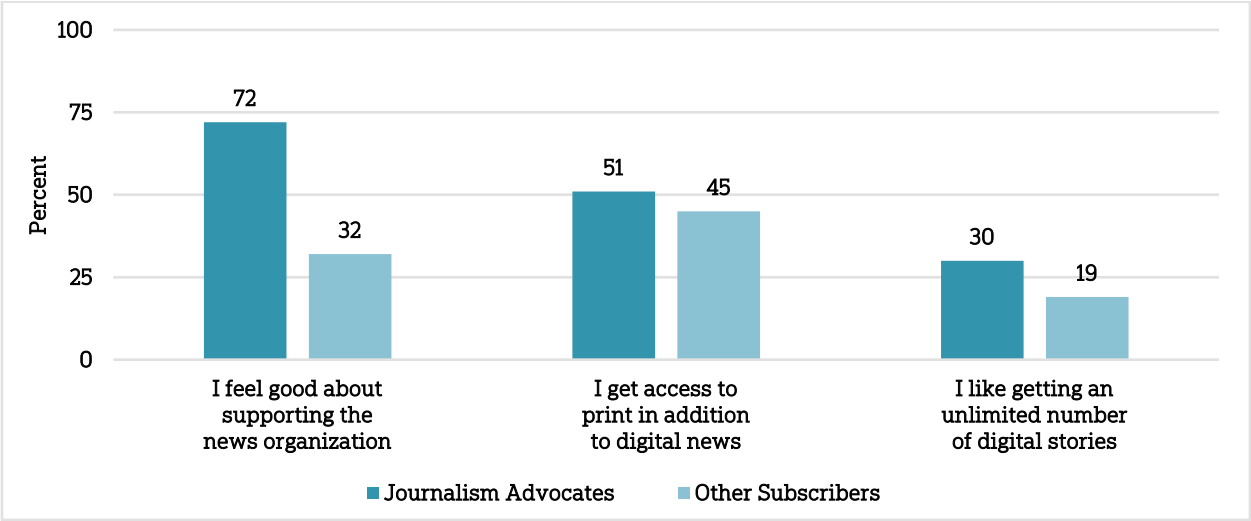


Question: People use news for many reasons. When it comes to the biggest reasons you use [NAME OF NEWSPAPER], how important to you is it that it...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Many Journalism Advocates say the biggest benefit they get from subscribing to their paper is that they feel good about supporting the news organization, and they say so at much higher rates than other subscribers. Half of Journalism Advocates also cite access to print as well as digital content. They are also particularly likely compared to other subscribers to cite the benefits of an unlimited number of digital articles.

Journalism Advocates say the biggest benefit from their subscription is that they feel good about supporting the news organization.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 6



Life Changers as a group decide to subscribe because of a transition in their own circumstances, not because of something the newspaper itself recently did. In many ways, this is a group publishers can take clear steps to identify.

Many have just moved to the area, and they picked up their new local paper when they arrived. Others have had changes to a job or lifestyle that allows them more time or money to afford the subscription.

Life Changers are less dependent than others on discounts and special offers to decide to subscribe. They highly value local news and the usefulness of articles, and are also strongly motivated by supporting the financial health of local journalism. They like newspapers in a traditional sense and are especially likely to prefer print to digital.

They are more likely than others to consume news about local politics and government, national politics, and news about their neighborhood or town. Life Changers strongly value the core benefits of professional journalism, such as providing reliable and factual information, helping them stay informed and be better citizens, dealing with all sides fairly, and being willing to admit mistakes.

When asked why they subscribed, Life Changers offer answers such as “I had to cancel my subscription briefly, but as soon as my financial situation improved, I re-subscribed” or “As soon as I moved back I started subscribing again.”

Life Changers include 16 percent of total respondents.

Publisher strategies for Life Changers

Those who subscribe via this path are distinctive in that they are motivated by factors that are outside a newspaper's editorial or marketing and promotion efforts. They are buying because of changes that have happened in their life, and their subscription meets a newly created need.

"I am new to the area," says one of the Life Changers. "I want to learn about my new home area."

The challenge here is not to convince them of the value of the subscription itself or entice them with promotional pricing. Instead, the challenge is finding these people at the right time and taking the steps to engage these readers through messaging that is customized for the subscriber group.

Publishers should target readers who are new to the geographic area, recent graduates, retirees, and readers with a new job or promotion. Additionally, they should seek partnerships with local organizations or groups, such as realtors, colleges, or employers, to offer discounted subscriptions. Publishers can rent or trade mail and email marketing lists with various groups in town, and segment marketing efforts accordingly, including direct mail and email campaigns.

Some examples of this thinking can be found at national and international outlets. Abroad, the *Financial Times* recently extended free access to 16- to 19-year-old students,¹³ many of whom are likely wrapping up secondary education and beginning college or work. Domestically, the *New York Times* is beginning a newsletter targeting college students and "people starting their careers,"¹⁴ which would provide the *Times* with email addresses for a young cohort of readers. The technology business publication *The Information* unveiled a "young professionals" plan,¹⁵ which offers a five-year half-off discount to people under 30 and is complemented by a Facebook group to allow young professionals to "trade notes about careers, share job opportunities, and more."

Some local newspapers are also finding ways to engage with people who are more transient to the area and move back and forth regularly, such as retired "snowbirds." These are typically print subscribers who might stop and start their paid subscription as they come and go, engaging only with the free content while away from the area. One publisher created a targeted campaign to keep the paid relationship intact by showing online access as part of their paid subscription and increased retention in this group as a result.

Some publishers take advantage of life changes that are predictable, such as law school graduates taking their state's bar exam. Legal magazines and newspapers hold local events for those attorneys who have just passed their bar exam. This gives the publisher exposure to a key audience—up-and-coming attorneys who have both the need and the means for professional publications.

Up close: Who are the Life Changers?

The largest crossover between Life Changers and other paths is with the Locally Engaged (28 percent of Life Changers are also in the Locally Engaged path). This shows that many Life Changers share the Locally Engaged group's general affinity for following local news, and were just waiting for the circumstances in their lives to change.

¹³ <https://aboutus.ft.com/en-gb/announcements/the-financial-times-extends-free-access-to-ft-journalism-to-school-students-around-the-world/>

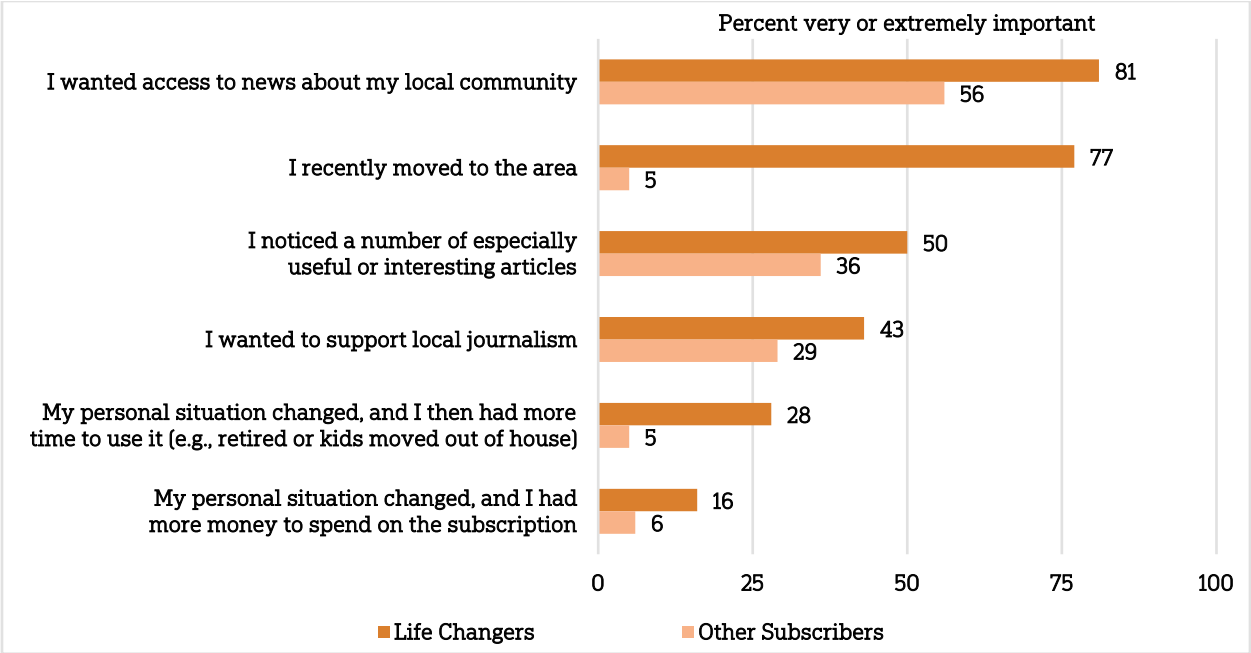
¹⁴ <https://www.nytimes.com/interactive/2018/jobs/nyt-job-theedit-young-writers.html>

¹⁵ <https://www.theinformation.com/introducing-young-professional-and-all-access-plans>

Life Changers often say they became ready to subscribe because they wanted access to news about their local community, had noticed a number of useful/interesting articles, had recently moved to area, or their personal situation had changed.

Notably, Life Changers are less discount-motivated than most subscribers.

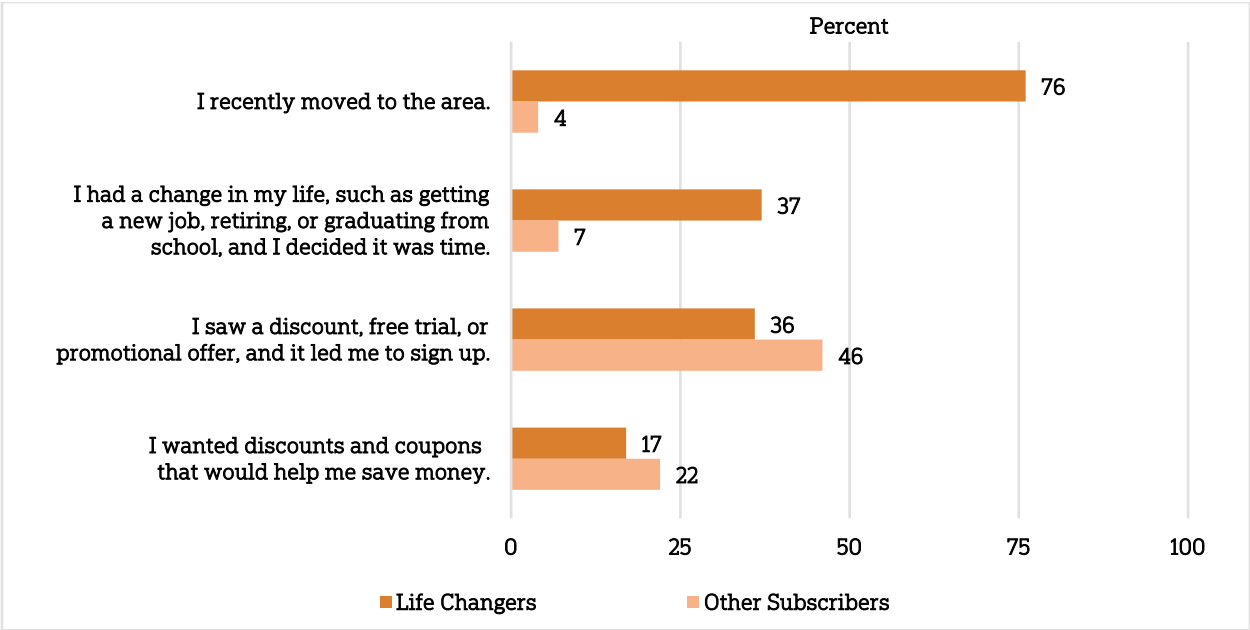
Life Changers often cite several key background factors for subscribing.



Question: There are a lot of reasons why a person may decide to subscribe to a news source. Here is a list of factors that might have crossed your mind as you considered subscribing to [NAME OF NEWSPAPER]. How important was each of these factors as you considered subscribing to [NAME OF NEWSPAPER]?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

The biggest trigger for Life Changers that led them to finally subscribe is having recently moved to the area or other life changes. Discounts and promotions are also common triggers, though less prevalent than among other subscribers.

For Life Changers, the biggest triggers are recently moving to the area or another life change.

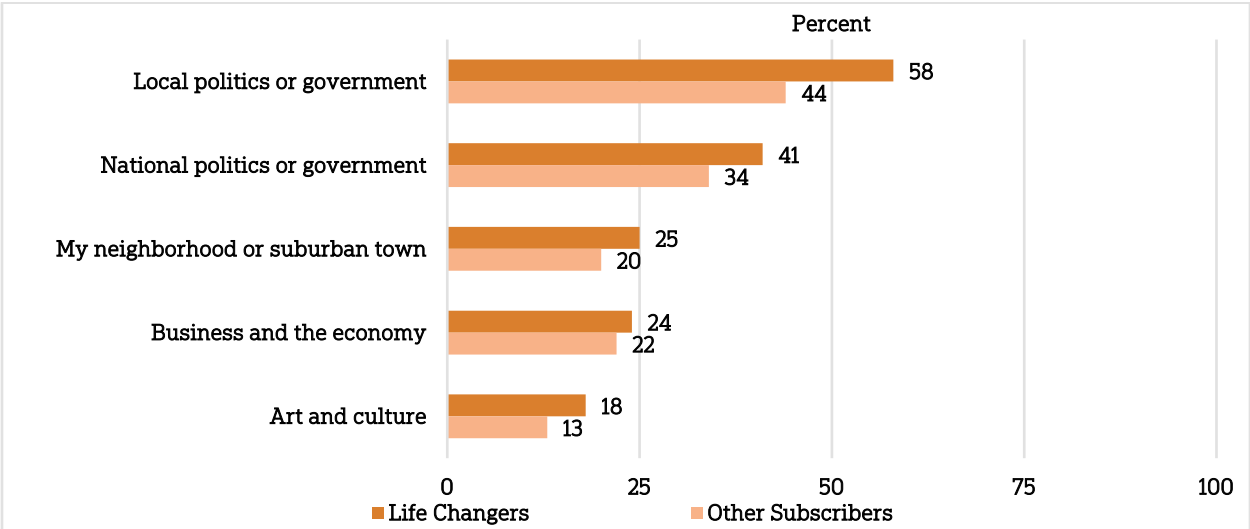


Question: While people may be thinking about subscribing to a news source for a while, there can be a specific moment or reason that serves as a tipping point when someone makes the decision to subscribe. Which, if any, of the following triggered your final decision to subscribe to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers

Life Changers tend to follow hard news topics, especially about their local area but also about the nation and beyond. The topics Life Changers most often use their newspaper for are local politics and government, national politics and government, news about their neighborhood or town, and business and the economy. Life Changers are more likely than other subscribers to follow each of these topics.

Life Changers follow many topics more frequently than other subscribers.

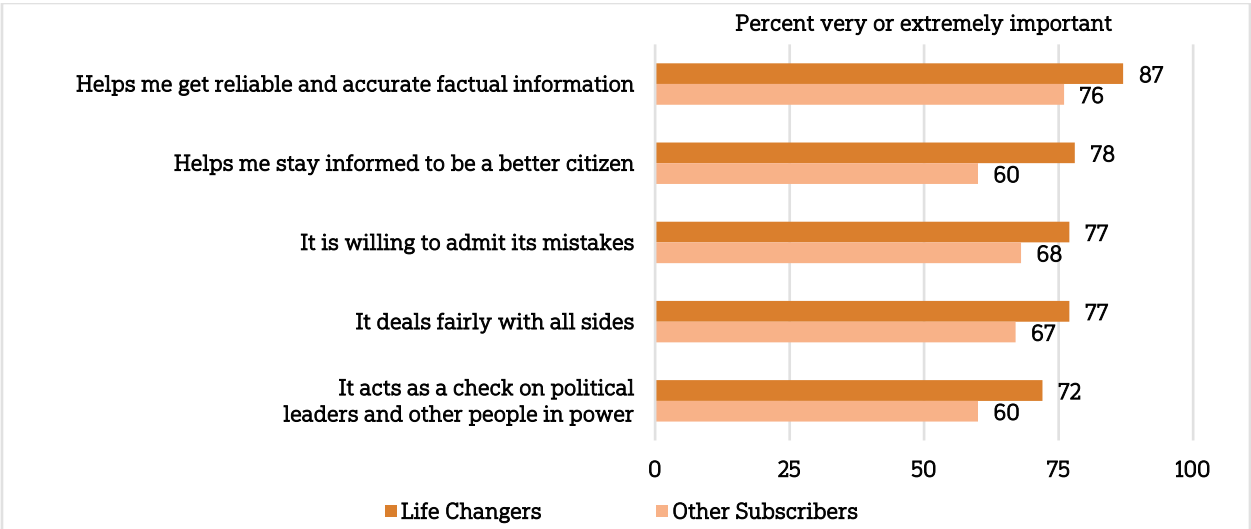


Question: Here are some common news and information topics. Which of these news topics do you follow most often or closely using [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Large majorities of Life Changers value their newspaper for being informative, unbiased, and transparent. They say the biggest reasons they use their newspaper is it helps them get reliable and factual information and to stay informed and be a better citizen, that it deals fairly with all sides, and is willing to admit its mistakes. Life Changers are more likely than other subscribers to cite these reasons.

Life Changers value getting reliable information and staying informed.



Question: People use news for many reasons. When it comes to the biggest reasons you use [NAME OF NEWSPAPER], how important to you is it that it...?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 7



Coupon Clippers are pretty self-explanatory—these people decided to pay for the newspaper at least in part because they value the coupons they can cut out to save money in stores. They are less likely to closely follow the news content.

Before subscribing, most of the Coupon Clippers used the paper’s coupons by buying individual copies, or borrowing print copies from friends or family. They are highly likely to be triggered to subscribe by a discount or promotion, in addition to their strong desire for coupons. Naturally, this group overwhelmingly prefers print.

Demographically, the Coupon Clippers are more likely than others to be women, identify as Republicans or independents, have less education, lower incomes, and live in suburban areas.

When asked why they subscribed, Coupon Clippers provide answers such as “I subscribe to get coupons and ads...not the news” or “coupons, but then I actually started reading it.”

“[I] need to get Sunday coupons for grocery shopping somehow,” says one of the Coupon Clippers.

Coupon Clippers include 12 percent of total respondents.

Publisher strategies for Coupon Clippers

This is one of the more distinctive groups of subscribers, given its deep and near-exclusive interest in coupons and ads. In some cases, the open-ended comments made clear their interest in coupons, and advertising outstrips their interest in news and the rest of the newspaper offerings.

However, Coupon Clippers are a relatively small group of survey respondents—about 1 in 10 subscribers—and it would be a mistake to think most print subscribers just want the coupons and are less interested in news.

To engage this group, publishers could use promotional tactics that convey the newspaper's coupons as a primary value of their subscription.

Like for Print Fans, interacting with the physical paper—in this case, using the coupons inserted in the newspaper—is an experience and ritual that is challenging to replicate online. But, digital coupons, even though they are far less prevalent, should be tried and tested.

Some publishers have been successful in partnering with a vendor to hold coupon workshops in their communities. The workshops are free to attend, and while there, attendees are taught how to use coupons. At the end of the workshop, the vendor sells newspaper subscriptions to the attendees, with the coupons being the primary value. They take a commission from the sales.

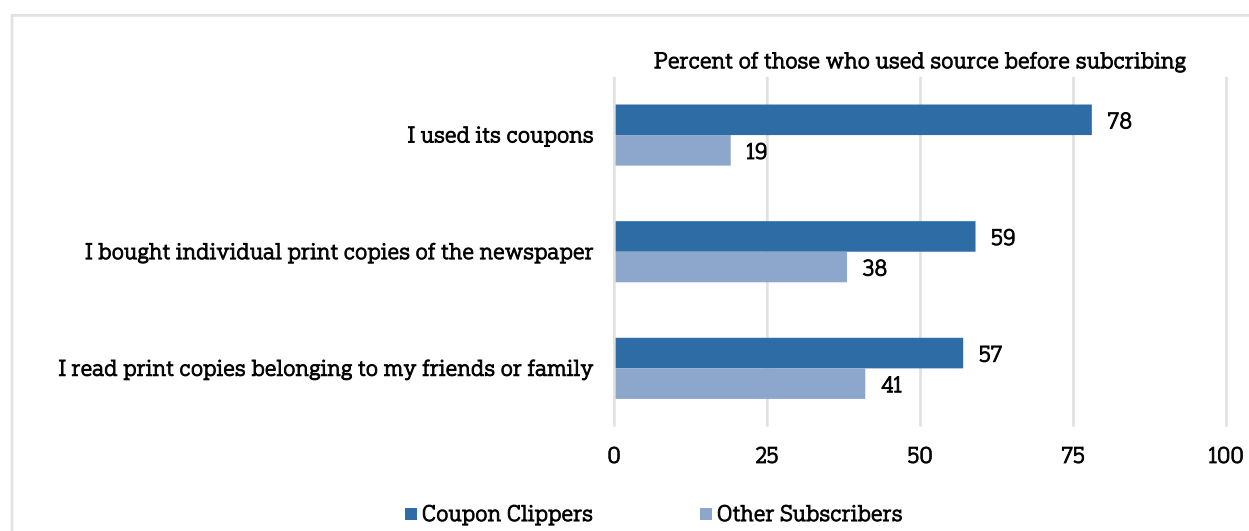
Another way publishers are highlighting the value of the paper's coupons is by marketing specific editions that have a lot of coupons. They will promote these online, through emails, and on the covers of retail copies for the newsstand.

Up close: Who are the Coupon Clippers?

Coupon Clippers overwhelmingly prefer print to digital (89 percent vs. 6 percent, with 4 percent having no preference).

Before subscribing, they interacted with the paper by accessing the coupons, buying individual copies of the paper, and using print copies from friends/family. They did all these things more often than other subscribers.

Coupon Clippers who used the source before subscribing used the coupons, bought individual copies of the paper, and read print copies of friends/family.

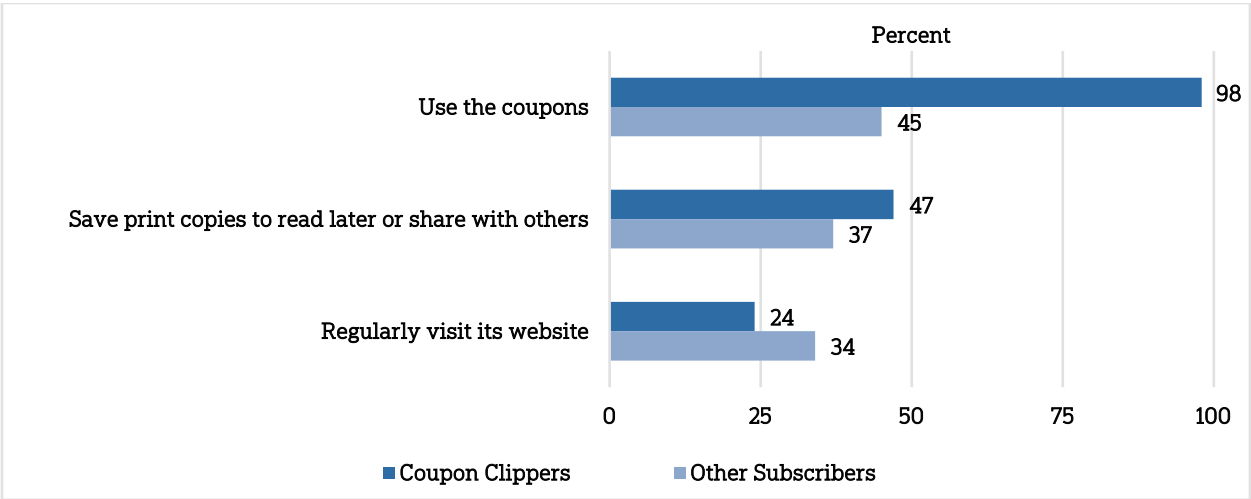


Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

As for how they use their paper now, Coupon Clippers most often say they use the coupons and save print copies for later. They are less likely than other subscribers to visit the paper’s website.

Coupon Clippers frequently use the coupons and save print copies to share.

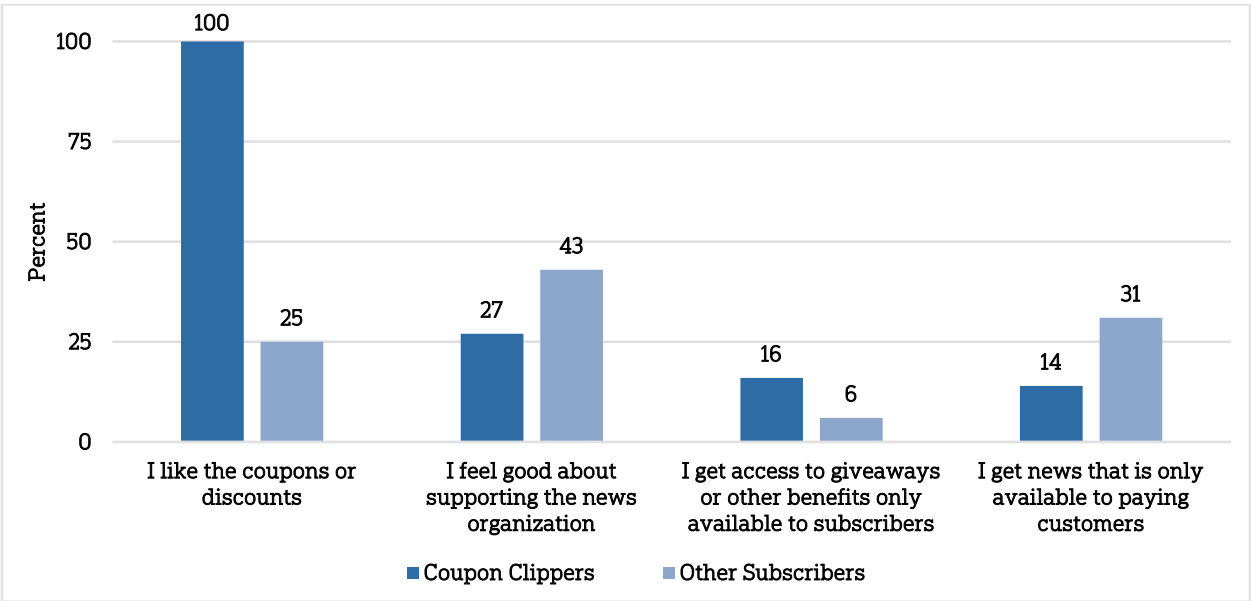


Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Coupon Clippers enjoy a range of benefits from their subscription, the most popular being, again, the coupons. They are also more likely than other subscribers to care about access to giveaways or other benefits available only to subscribers.

Yet, Coupon Clippers are less likely than other subscribers to say they feel good about supporting the organization or that they enjoy getting news only available to paying subscribers.

Coupon Clippers are more likely than others to value benefits only available to subscribers.



Question: Now that you subscribe to [NAME OF NEWSPAPER], which of the following do you consider the biggest benefit of your subscription? Please select up to three (3).
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 8



The Print Fans often like the “experience” of a printed newspaper. In their open-ended descriptions, they talk about sitting with the paper and having their coffee in the morning, discovering stories and spending time reading them.

They also choose to subscribe because of the convenience of print home delivery, or because they have had a long history and good feelings about starting their day with a physical newspaper.

While this group prefers print over digital, it is important to note that they also interact with the paper digitally as well—in apps, on mobile, and in social. Print is a preference, but it is no longer a singular behavior.

Before subscribing, print fans are likely to have used print copies from friends or family, bought individual print copies, and are particularly likely to have used the coupons before and after subscribing. Print Fans are particularly likely to say the paper matters to them because it’s enjoyable or entertaining. Like other subscribers, they were most often triggered to sign up by a discount or promotion.

Print Fans include 16 percent of total respondents.

Publisher strategies for Print Fans

“I love getting a newspaper in my hand in the morning before my day begins,” says one of the Print Fans.

As print circulation and its advertising revenue continue to decline, newspaper publishers need to actively think through ways to engage print readers outside the print edition.

Print subscribers can share their reading habits and opinions in surveys and focus groups, but with no usage or engagement metrics, publishers have far less transparency about which content is being read and shared.

For promotions and messaging to Print Fans, publishers need to highlight the print subscription as an overall experience, conveniently delivered to homes. Since print subscribers are often long-term subscribers, a publisher's database could be missing certain digital contact information, such as an email address, that is critical in ongoing communications and in driving print subscribers online to activate.

Some publishers are also using their e-edition as a bridge for their print subscribers to engage with the paper's digital offerings. By adding content that is exclusive to the replica not found in print or online, around topics of interest such as sports and lifestyle, some publishers have been able to increase readership and engagement. Unlike within the pages of the print edition, replica readers can be tracked and measured, giving visibility to these subscribers' actions and interests.

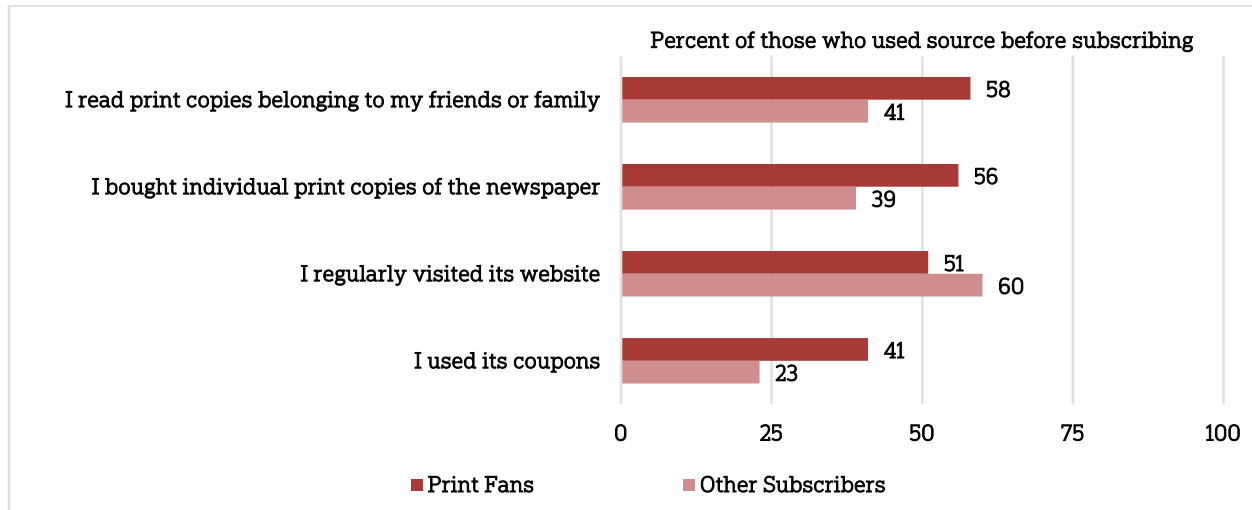
Several publishers have also implemented successful account activation campaigns for their new and existing print subscribers. These campaigns include promoting the subscriber's digital access through print, email, and online. Sending an email as the replica is published online increased one publisher's subscriber engagement of the replica by 50 percent.

Up close: Who are the Print Fans?

Print Fans are majority female (56 percent vs. 46 percent of other subscribers), but they resemble other subscribers in terms of age and race. They live in similar areas (more than half in the suburbs) and subscribe to similarly sized papers as do other subscribers.

Print Fans differ from other subscribers in how they used the paper before subscribing. Print Fans who used the paper for free before they subscribed most commonly used print copies from friends/family and bought individual print copies, and they did both more than other subscribers. A majority of those used the website, but still, Print Fans are less likely than others to have used the website. Print Fans are particularly likely to have used the coupons before subscribing.

Print Fans who used the source beforehand say they used print copies from friends/family, bought individual print copies, and used the website.



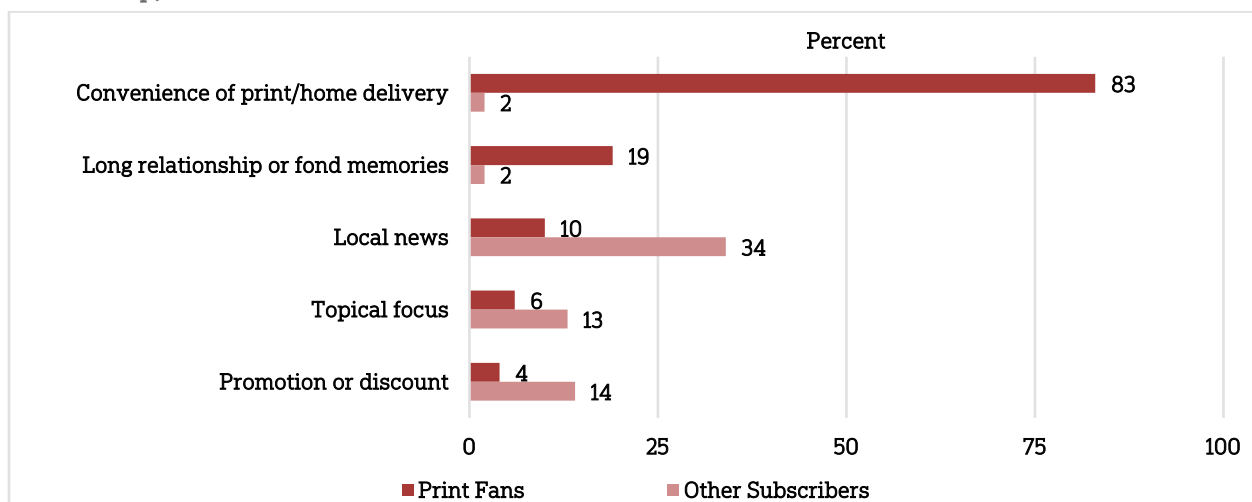
Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

Print Fans stand out in two ways when asked in an open-ended question to describe why they subscribe. Overwhelmingly, they mention something about the convenience of print. And they are also far more likely to mention a long relationship or fond memories with the paper.

But again, this group of Print Fans represents just 16 percent of all subscribers. Making this the focus of an appeal is a limited strategy.

The most popular reasons Print Fans say they chose to subscribe are convenience of print, a long relationship, or local news.



Question: Describe in your own words why you decided to subscribe to [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

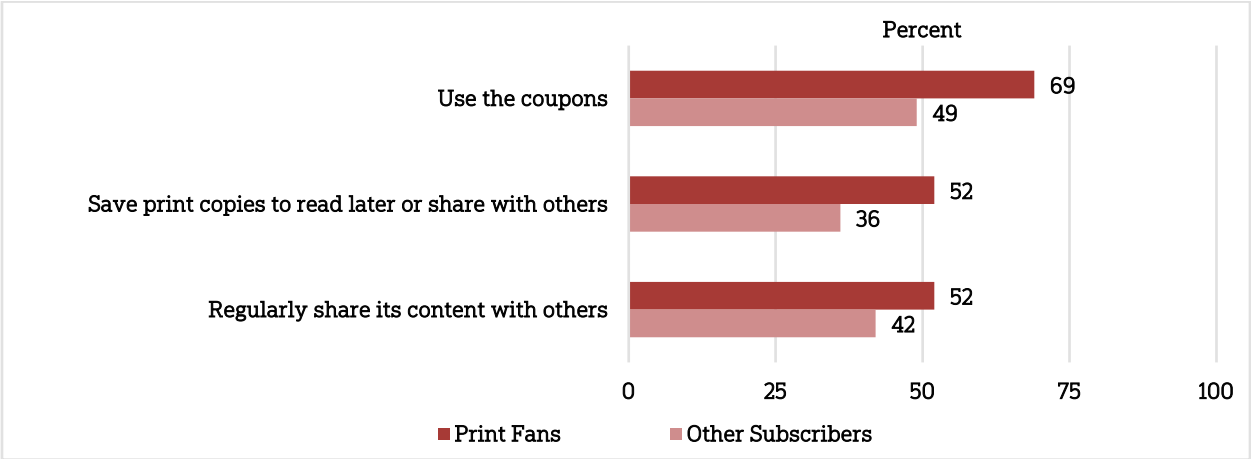
Print Fans are moved by a host of background factors. They mention wanting access to local news (61 percent), seeing many useful articles (41 percent), and a discount or promotion (36 percent), all at similar rates to other subscribers.

When it comes to the specific trigger that led them to subscribe, Print Fans are similar to other subscribers and most often cite a discount or promotion (45 percent), a desire for coupons (25 percent), or that they recently moved to the area (16 percent).

Print Fans often follow local politics (45 percent) and national politics (40 percent), and are more likely than other subscribers to value that their paper is entertaining (55 percent vs. 38 percent).

And once they have subscribed, print-related factors are key to their interaction—coupons and sharing print copies. But sharing content with others is also popular among Print Fans.

The most common ways Print Fans interact with their paper are coupons, sharing content, and saving print copies.



Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?
Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

PATH 9



The Friends and Family group subscribed because they found the publication through their loved ones and, in some cases, saw it as a way to connect with them through the news. The paper, in other words, is part of the social flow of their lives.

The publication may have been something that they grew up with. It may have been something they discovered and discussed around the dinner table. It may be something their peer group of friends is talking about. People may have been reading print copies that belonged to their friends. They also may have been sharing or noticing their friends sharing the paper's content on social media.

Others were triggered to subscribe by a discussion with friends or family, or say it is extremely important to get the newspaper so they can use it to talk to friends or family about current events.

This group is a reminder that consumers don't act in isolation—their behavior and decisions are influenced by other people and by social dynamics.

The news content matters a great deal to the Friends and Family group, as high-quality and interesting articles are how the subscriber can share and converse with other people. Among the reasons this group says they were ready to subscribe are that they wanted local news, saw a number of interesting articles, and wanted coverage of a specific topic.

This group favors print over digital, in similar proportions to other recent subscribers.

The Friends and Family group tends to be female and identify as a Democrat. They are also both more urban and slightly younger than other subscribers.

Friends and Family includes 15 percent of total respondents.

“My parents read the LA Times religiously,” says a subscriber in the Friends and Family path. “I took over their subscription upon their death. It speaks to me and to my community.”

Publisher strategies for Friends and Family

This path is highly influenced by family and friends, but they also share content that they find interesting and relevant.

This is the only subscriber path that cites education as a primary topic of interest, as well as the only group to cite coming to events as a significant way they interacted with the paper. There are potential opportunities here to create events, newsletters, podcasts, and more around education and parenting.

We think this path offers some concrete steps for publishers to experiment with.

Publishers should test different “refer a friend” programs, where subscribers can refer friends or family to receive a discount or as a gift. Publishers should also test offering discounts and benefits to those who refer new subscribers.

One popular and effective way to sell subscriptions to Friends and Family is through gift subscriptions. These offers are often pushed at the end of the year, asking the existing subscriber to renew at a discounted rate and also give another friend a gift subscription at a promotional rate. This tactic increases new subscriptions, as well as increases retention by having the existing subscription renew early.

In addition, different bundled subscription packages should be tried for family, including group access to print and digital. Some publishers limit digital access to two different email logins. It is worth testing the possibility of allowing more users digital access for months or even a year in those cases.

Meanwhile, publishers will need to implement customized engagement and retention efforts for recipients of gifted or bundled subscriptions, since these readers may not be as motivated to use their access. It is important to keep these new readers engaged.

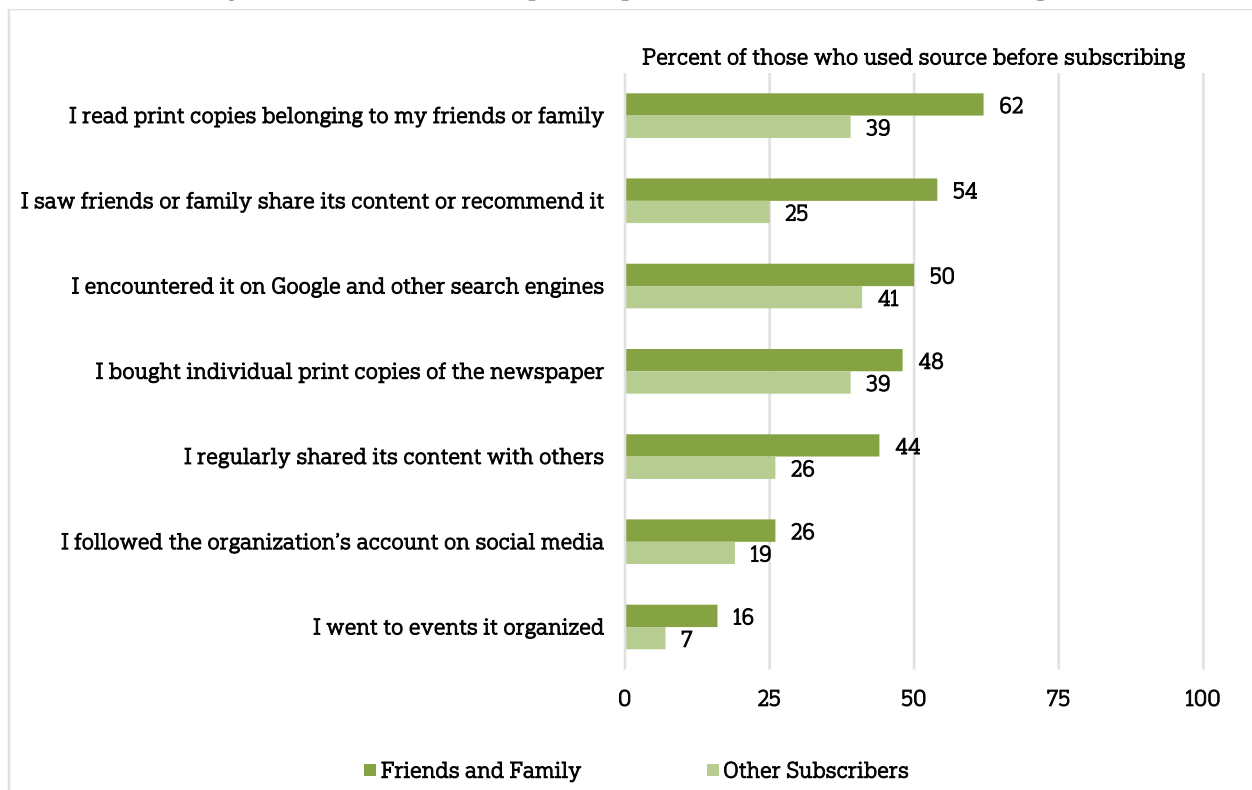
Up close: Who are the Friends and Family group?

Subscribers who found their way through friends and family skew heavily female compared with other subscribers (60 percent vs. 45 percent). A majority are Democrats (61 percent vs. 48 of other subscribers). They are also slightly more urban than other subscribers (36 percent vs. 27 percent), but they are found at all sizes of papers similar to other subscribers.

Some of the most common ways Friends and Family subscribers interacted with the source before subscribing are using print copies belonging to friends or family and seeing shared content from friends or family.

These subscribers are also more likely than other subscribers to encounter their source through content shared by others and to have shared content themselves.

Friends and Family subscribers often used print copies from others before subscribing.

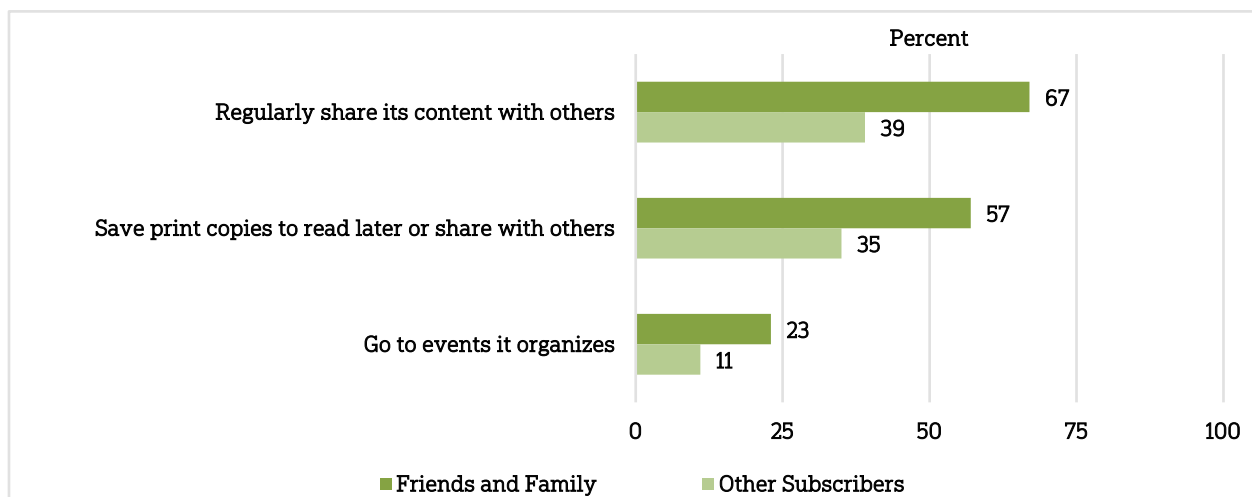


Question: Prior to becoming a paying subscriber to [NAME OF NEWSPAPER], in which of the following ways did you interact with [NAME OF NEWSPAPER]?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

After subscribing, this group is more likely than others to regularly share the content, save print copies to share with others, and go to events the publisher organizes.

Friends and Family subscribers often share content and save print copies.



Question: Now that you subscribe to [NAME OF NEWSPAPER], in which of the following ways do you interact with [NAME OF NEWSPAPER]? Do you ...?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

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 November 9 through December 13, 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.

To conduct this survey, the Media Insight Project partnered with 12 different newspaper publishers with 90 newspapers across the country. The publishers who participated in the study are: A.H. Belo Corporation (Dallas Morning News), BH Media Group (Omaha World-Herald), The Buffalo News, Lee Enterprises, The McClatchy Company, Star Tribune Media Company (Minneapolis Star Tribune), The Seattle Times Company, Skagit Publishing, Cowles Publishing Company (The Spokesman-Review), Teton Media Works (Jackson Hole News&Guide), Tronc (Tribune Publishing Company), and The Virginian-Pilot.

Each publisher provided contact information for all people who began subscribing to their papers during the prior three months, from August 1 through October 31, 2017. All recent subscribers with a valid email address received an email invitation to complete the survey online, and 4,113 completed the survey. Surveys were conducted online in English. We used the email addresses only for the purpose of this study, and we made sure to protect the confidentiality of all potential respondents.

The final set of completed interviews from this convenience sample includes adults age 18 and older from 47 states and the District of Columbia. The sample frame provided by publishers included about 200,000 email addresses. About 10 percent were deemed invalid, and the overall response rate for the survey was about 2 percent. The results presented in the study are descriptive of the responding subscribers to the participating newspapers and cannot be generalized to the full population of recent subscribers in the United States.

Respondents were not offered any incentive for completing the survey, and data were not weighted.

Details about the Media Insight Project can be found at: www.mediainsight.org. The full topline report can be found [here](#). For more information, please email info@apnorc.org.

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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 advances an innovative and sustainable local news industry by helping publishers understand and engage audiences, grow revenue, improve public-service journalism, and succeed at organizational change. API is a national 501(c)3 nonprofit educational organization affiliated with the News Media Alliance. It works with and draws on the best ideas from technology, business and publishing.

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.

APPENDIX 1: RESPONDENTS' DEMOGRAPHICS AND NEWS BEHAVIORS

The set of respondents to this study include newspaper subscribers from 47 states plus the District of Columbia.

Most of these subscribers live in suburban areas (55 percent), while 28 percent live in urban areas and 17 percent live in rural areas.

The subscribers interviewed skew older than the general population—65 percent are age 60 and older, and 93 percent are over age 40.

Roughly a third are high income (earn \$100,000 a year or more), and a third are middle income (earn between \$50,000 and \$100,000). Many are highly educated: two-thirds have a college degree, and another 26 percent have some college education.

These subscribers are also mostly white (88 percent), while 12 percent are black, Hispanic, or another race or ethnicity. Fifty-one percent are men, and 47 percent are women.

THESE SUBSCRIBERS CONSUME A GREAT DEAL OF NEWS ON MANY DIFFERENT DEVICES AND PLATFORMS.

These recent subscribers consume news frequently, with 91 percent saying they look at the news at least “several times a day.”

Most of these respondents' subscriptions include a print edition. Seventy-nine percent say they receive home or mail delivery of a print newspaper. About half of the respondents' subscriptions include unlimited access to the publication's website or mobile apps, and half include access to a digital replica of the print newspaper. Thirty-seven percent of the subscriptions include both a print edition and unlimited digital access.

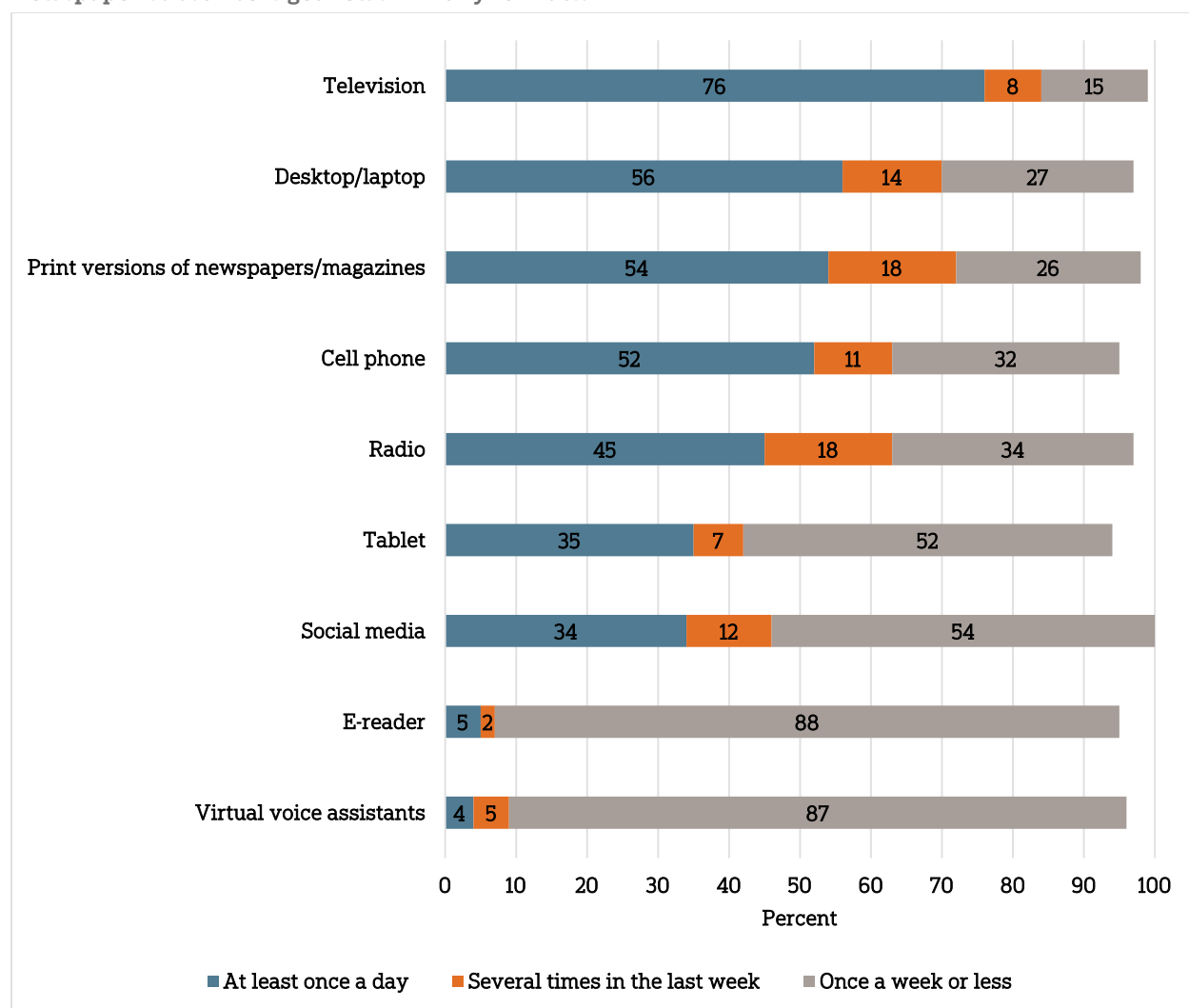
Among all the study's subscribers, 71 percent prefer or only use the print paper, 26 percent prefer or only use digital content, and 3 percent do not have a preference.

Regardless of preference, about half of subscribers get news from the paper they subscribe to about once a day, while a quarter say they get it more than once a day and a quarter say they get it less than once a day.

Many of these subscribers consider news important to them. Nearly three quarters (72 percent) say it is either extremely important to them (23 percent) or very important (49 percent).

These subscribers all subscribe to a newspaper, but they also get news through other devices and mediums. Overall, the respondent gets news from five devices daily, and 1 in 4 people use seven or more devices.

Newspaper subscribers get news in many formats.



Questions: How often, if at all, have you used each device or technology to get news and information in the last week? These days many people get their news and information from social media. How often do you watch, read, hear, or see news on social media?

Source: Media Insight Project poll conducted November 9-December 13, 2017, with 4,113 recent subscribers to newspapers.

THESE SUBSCRIBERS ARE ACTIVE NEWS CONSUMERS, AND MANY ARE CIVICALLY MOTIVATED READERS.

The majority of respondents in this survey identify themselves as people more inclined to seek out the news they want (86 percent), rather than bump into it while doing other things (13 percent).

But among these subscribers, the majority say they prefer to get the news just once or a few times a day (67 percent), while about a third (31 percent) prefer to get news throughout the day.

In a separate study,¹⁶ the Media Insight Project conducted qualitative interviews using a methodology called Human Centered Design. This is a system, innovated at the Stanford Design School, which uses long interviews with people to develop personas or archetypes that helps designers or business people tailor products and processes for those consumers.

¹⁶ <https://www.americanpressinstitute.org/publications/reports/survey-research/news-subscriber-types/>

Using this method, a qualitative research team developed three archetypes of news subscribers. One group, whom we call Civically Committed, is oriented to subscribe to the news out of a sense of civic and even emotional motive, a desire to support journalism and be connected to the community. A second group, whom we call Thrifty Transactors, are motivated in larger part because they think the news will help them, particularly with saving money, and who say they look for coupons and also subscription discounts. A third group, the Elusive Engagers, are the least likely to subscribe, and when they do subscribe, they say it's because it's information they can't find for free, often around a specific subject. These people are somewhat more likely than others to assemble their own news mix from many sources.

In this survey, respondents were asked to pick which set of group characteristics best described them. About half (45 percent) chose the description of the Civically Committed subscriber. A little more than a third (36 percent) identified with the description of the Thrifty Transactor. And just under 1 in 5 (17 percent) identified most strongly with the Elusive Engager.

APPENDIX 2: ANALYTICAL DEFINITIONS OF PATHS

DIGITAL PAYWALL CONVERTERS

There are 857 Digital Paywall Converters. The path is defined by two elements: 1) Have a digital or bundled subscription; and either 2) A trigger factor is hitting the article limit, or a top benefit is an unlimited number of digital stories, or in their own words they say they subscribed due to a paywall/wanting access.

TOPIC HUNTERS

There are 941 Topic Hunters. The path is defined by two elements: 1) Topic or issue coverage is a very important reason they subscribe; and either 2) An important background factor was topic coverage, or in their own words they say they subscribed due to a topical focus.

THE LOCALLY ENGAGED

There are 733 Locally Engaged. The path is defined by three elements: 1) An important background factor was access to local news; and 2) In their own words, they say they subscribed for local news; and 3) They either regularly follow news about local politics and government or news about their neighborhood/town.

SOCIAL MEDIA-MOBILE DISCOVERERS

There are 777 Social Media-Mobile Discoverers. The path is defined by three elements: 1) Get news often on a cell phone; and 2) Use social media often; and 3) Interact with the paper by either getting news alerts, following its journalists on social media, or sharing content.

JOURNALISM ADVOCATES

There are 968 Journalism Advocates. This path is defined by several elements: They could either say 1) An important background factor is concern about the accuracy of reporting from free news sources; and 2) A trigger factor is either seeing messaging about supporting journalism or being motivated by recent verbal attacks of the press. Or, 1) They rate their paper's news and information as very or completely reliable; and 2) Rate either dealing with all sides fairly or a willingness to admit its mistakes or that it helps them get reliable and accurate information as extremely important to their use of the paper; and either 3) An important background factor is concern about the accuracy of reporting from free sources or in their own words say trust or quality was an important reason they subscribed.

LIFE CHANGERS

There are 671 Life Changers. The path is defined by two elements: 1) An important background factor is either more time to use it, more money to spend, or recently moved; and 2) A trigger factor is either recently moved to the area, life change, or other change.

COUPON CLIPPERS

There are 505 Coupon Clippers. The path is defined by three elements: 1) An important background factor was coupons; and 2) A key trigger factor was coupons; and 3) One of the biggest benefits of their subscription is coupons.

PRINT FANS

There are 661 Print Fans. The path is defined by two elements: 1) Prefer or only receive a print version of their paper; and 2) In their own words, say they subscribed for either convenience of print or because of a long relationship with the paper.

FRIENDS AND FAMILY

There are 610 Friends and Family. The path is defined by one element: 1) Either friends or family using it was an important background factor and they either saw friends or family share content from the paper or used to read the print copies of friends or family, or they were triggered by a discussion with friends and family, or an extremely important reason they use it is to help them talk to friends and family.