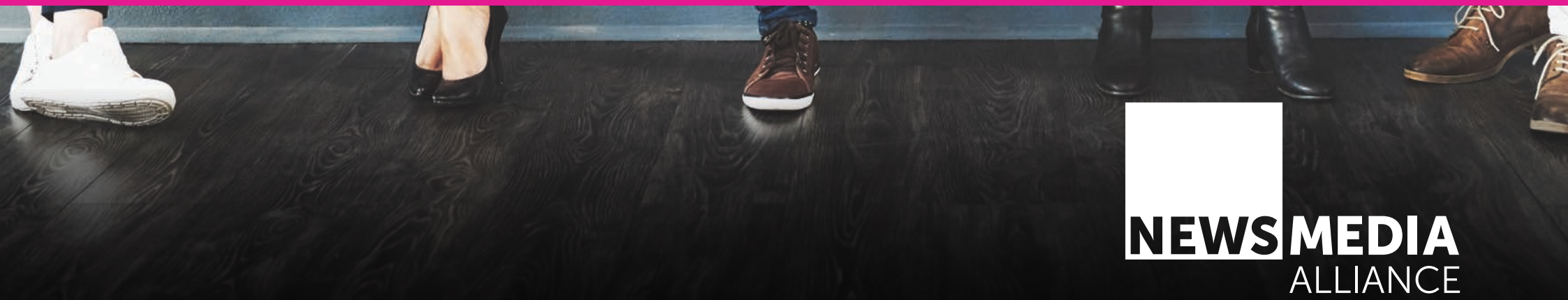




NEWS ADVERTISING PANORAMA

A wide-ranging look
at the value of the news audience



NEWS MEDIA
ALLIANCE

WHAT IS THE NEWS ADVERTISING PANORAMA?

The *News Advertising Panorama* includes compelling research, statistics and stories that demonstrate how news media are uniquely positioned to provide marketers with effective advertising solutions. Here we portray the power of the news media industry to engage audiences, reach shoppers and deliver results for advertisers.

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news media's
**unique selling
proposition**

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learn how trusted
**local journalism
engages audiences**
in a unique and
compelling way

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learn how **news
media provide
brand-safe
environments**
for your advertising
messages

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see the **creative
and innovative**
programs that news
media provide for
marketers of all kinds

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learn how effective
news media
advertising is at
**moving
customers
to action**

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see the **income
and education
levels** of the news
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see how news media
**engage adults
who shop** and
buy in your category

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see how **news media
deliver voters,
influencers** and
adults who contribute
to causes that are
important to them

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see news media's
**extraordinary
reach** across age
groups, including
younger adults

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Learn about news
media **digital
audience growth**

“Real journalism has rarely been more needed and more central to the American conversation than it is today. If democracy is built on a common understanding of truth fueling consequential choices, we need the reporters of truth to have a business model that attracts the funds they need to get their work done.”

-Seth Rogin, CEO, Nucleus Marketing Solutions



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INTRODUCTION

REBECCA FRANK

Director, Research & Insights

When looking at the relationship between the news media industry and advertising, one often thinks of the monetary side of the partnership. But there's more to it than that. The most valuable asset to an advertiser is a respected and reliable partner that their audience trusts. With news media, you get that respected partner.

While the news media landscape has evolved rapidly in the past few years, what hasn't changed is the fact that people trust their favorite news source — and the advertisements they find within. But not all advertisers are aware of the value the news media offer to their clients.

It may seem easier to advertise with the tech giants and social media platforms, but it is possible today to reach a diverse, relevant audience by relying on news media partners as your primary source for advertising products and services. You'll be able to reach your desired audience across numerous platforms, from print and digital to social media, video and audio.

In this report, we'll examine all the ways news media are equipped to provide the best advertising partnerships, as well as the most valuable audiences for those ads. We'll explore the education and income of news media readers and viewers, as well as their buying and spending habits and their role as influencers in society. All of these factors and more make the news audience one that advertisers big and small should be targeting.

The news media are here to help you deliver quality advertising to a valuable audience — and they are ready to help you.



A MESSAGE FROM THE CEO

DAVID CHAVERN

President & CEO

The advantages of advertising alongside news content have long been understood by marketers. News media have long been a quality, trustworthy source of information that, combined with local advertising, have provided the news audience with information they need and know they can trust. Yet, as the media landscape continues to evolve, it is important to continue to tell the news media story, with updated information from a variety of reliable sources.

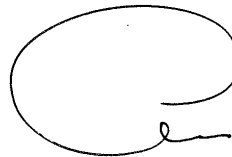
News Media Alliance members represent over 2,000 of today's most trusted and compelling news media organizations. The *News Advertising Panorama* includes research, useful statistics and compelling stories that demonstrate how the news media industry is uniquely positioned to provide marketers with effective advertising solutions — in traditional print newspapers and across all manner of digital platforms.

No longer are news organizations relegated to one channel, and our members recognize that and have adapted their publications to meet consumers' changing needs and preferences.

As a result, the opportunities that a company now has to reach their audience have grown exponentially, and they continue to grow and evolve as the media landscape changes.

Our members work tirelessly to keep their communities informed. Readers turn to their preferred news outlets because they want a trusted and credible source of information. The combination of trusted content and relevant advertising in our member publications drives levels of audience engagement that are unmatched by other forms of media and platforms.

In this ever-changing media landscape, it is pertinent that publishers and advertisers understand the value they bring to each other and the key role each plays in the lives of the news media audience. With the publication of the *Panorama*, we hope to further those relationships and help our industry thrive.



NEWS MEDIA TODAY





The news media industry has long served the U.S. democracy by providing accurate and truthful news and information, while vigilantly pursuing the people's right to know the truth.

While the mission of news media has remained steadfast, the way in which news media content is developed and delivered has evolved (and will continue to evolve) to meet the needs of readers and advertisers alike.

Today, your local news media company is a multi-pronged business publishing content via a variety of platforms, both print and digital. They also support local businesses by serving as a trusted source of local advertising. The combination of quality editorial content and relevant advertising creates levels of audience engagement unequalled by other media.

For advertisers, news media companies offer a variety of customer-focused marketing solutions, from standard print and digital advertising to events, research and marketing services.

These are just some of the unique benefits that news media provide:

- Superior coverage, both mass and targeted, across multiple platforms
- Access to affluent, educated and engaged readers and subscribers
- Innovative and effective advertising and marketing solutions
- Brand-safe advertising environments
- Advertising and marketing expertise and resources

Thanks to advancements in technology, news media companies remain committed to their core mission, even as they continue to evolve. Through reporting, editing and distributing news and information with accuracy and integrity, citizens can make informed, fact-based decisions about the important issues of the day.

NEWS MEDIA'S UNIQUE SELLING PROPOSITION

TRUSTED LOCAL JOURNALISM

BRAND-SAFE ENVIRONMENTS

CREATIVE & INNOVATIVE ADVERTISING & MARKETING SOLUTIONS

LOCAL ADVERTISING & MARKETING EXPERTISE

ADVERTISING EFFECTIVENESS

AFFLUENT, EDUCATED AUDIENCES

ENGAGED AUDIENCES

REACH

Local news publishers are the most trusted by consumers.

Advertising in news media will not be associated with inappropriate content.

The news media industry offers print and digital solutions, targeted audiences, events and more.

Local news media are experts on their audience and are ready to help you grow your business.

News media offer the most trusted advertising channel for those making purchasing decisions.

The median annual household income of the American news audience is more than \$60k.

News media outlets offer superior coverage of shoppers across multiple categories.

Print and online news media reach 136 million U.S. adults every week.

TRUSTED LOCAL JOURNALISM

Local news publishers are the most trusted by consumers.



TRUSTED LOCAL JOURNALISM

- According to data from the Bureau of Labor Statistics' Occupational Employment Statistics,

people worked as reporters, editors, photographers, or film and video editors in the newspaper industry in 2017. These are dedicated professionals who work hard every day to cover their communities and keep their readers informed.

- **27%** Americans who have a "great deal" or "quite a lot" of confidence in newspapers" compared to the previous year (20%), and the highest since 2011, according to a 2017 Gallup poll.
- The jump of 7 percentage points from 2016 is the largest for any institution measured by Gallup.

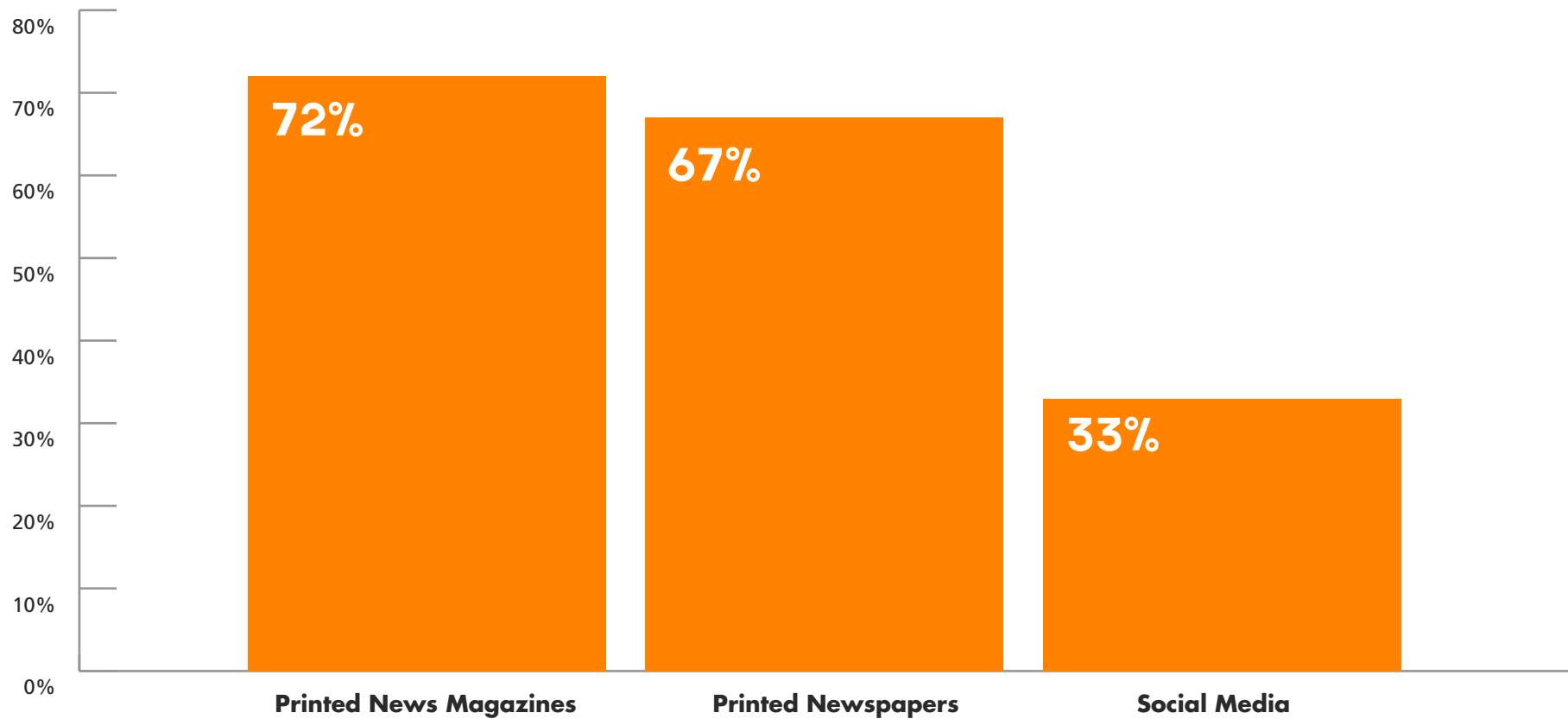
- **27%** Americans' confidence in newspapers, according to the same Gallup poll.
- Higher than TV news (24%) and the Internet (16%).



Source: Newspaper Fact Sheet, Pew Research Center, June 2017. Gallup, June 28, 2018.

CONSUMER TRUST IN PRINT NEWS MEDIA

Consumer trust in print news media is more than double their trust in social media.



Source: Kantar Media, "Dimension 2018."

BRAND-SAFE ENVIRONMENTS

Advertising in news media will not be associated with inappropriate content.



News media provide quality content, in trusted and safe editorial environments, created by real journalists and curated by qualified editors.

BRAND-SAFE ADVERTISING ENVIRONMENTS

Value to Advertisers: Ads in news media are guaranteed not to appear alongside inappropriate content.

Advertiser Protection Bureau: The American Association of Advertising Agencies has launched the Advertiser Protection Bureau (APB) to tackle concerns about brand safety.

Who's in Charge? Because brand-safety concerns have a growing impact on agencies' media strategies, the most important person at most agencies today is the brand-safety officer.

CREATIVE & INNOVATIVE ADVERTISING & MARKETING SOLUTIONS

The news media industry offers print and digital solutions,
targeted audiences, events and more.

CREATIVE & INNOVATIVE ADVERTISING & MARKETING SOLUTIONS

News publishers provide advertising opportunities across the print and digital spectrum, including:

Newspaper print advertising

Custom-printed inserts

Polybags

Direct mail (targeted and total market coverage)

Sticky notes

Custom printing and delivery

Websites (display)

Native advertising

Newsletters and email

Mobile

Search engine optimization (SEO)

Search engine marketing (SEM)

Pay-per-click advertising (PPC)

Social media

Video

Web design and development

Event marketing and sponsorships

eCommerce

LOCAL ADVERTISING & MARKETING EXPERTISE

**Local news media are experts on their audience and
are ready to help you grow your business.**

LOCAL ADVERTISING & MARKETING EXPERTISE



Local media experts are ready to deliver customized campaigns to help your business grow.

- **McClatchy's Excelerate** is a full-service digital marketing agency, the goal of which is to help local and regional marketers grow by leveraging the latest technologies and techniques to smartly engage the right audiences.
- **Digital First Media's Adtaxi** develops customized digital campaigns to help marketers drive results by optimizing combinations of digital touchpoints to increase marketing efficiency.
- **Gatehouse Media's Upcurve** offers a variety of digital marketing services, including targeted display, social marketing, SEO, SEM, email, website development and more.

Source: Company websites, August 2018.

ADVERTISING EFFECTIVENESS

News media offer the most trusted advertising channel for those making purchasing decisions.



ADVERTISING EFFECTIVENESS

Benefits of advertising in news media:

Trust: Print ads are the most trusted advertising channel for people making purchase decisions.

Recall and Likability: Consumers like print newspaper ads more and remember them better than other types of ads.

Inserts: Newspaper inserts are read by most readers and result in specific actions taken.

Ad Receptivity: Newspaper ads are viewed as 51 percent positive globally and 43 percent positive in the U.S.

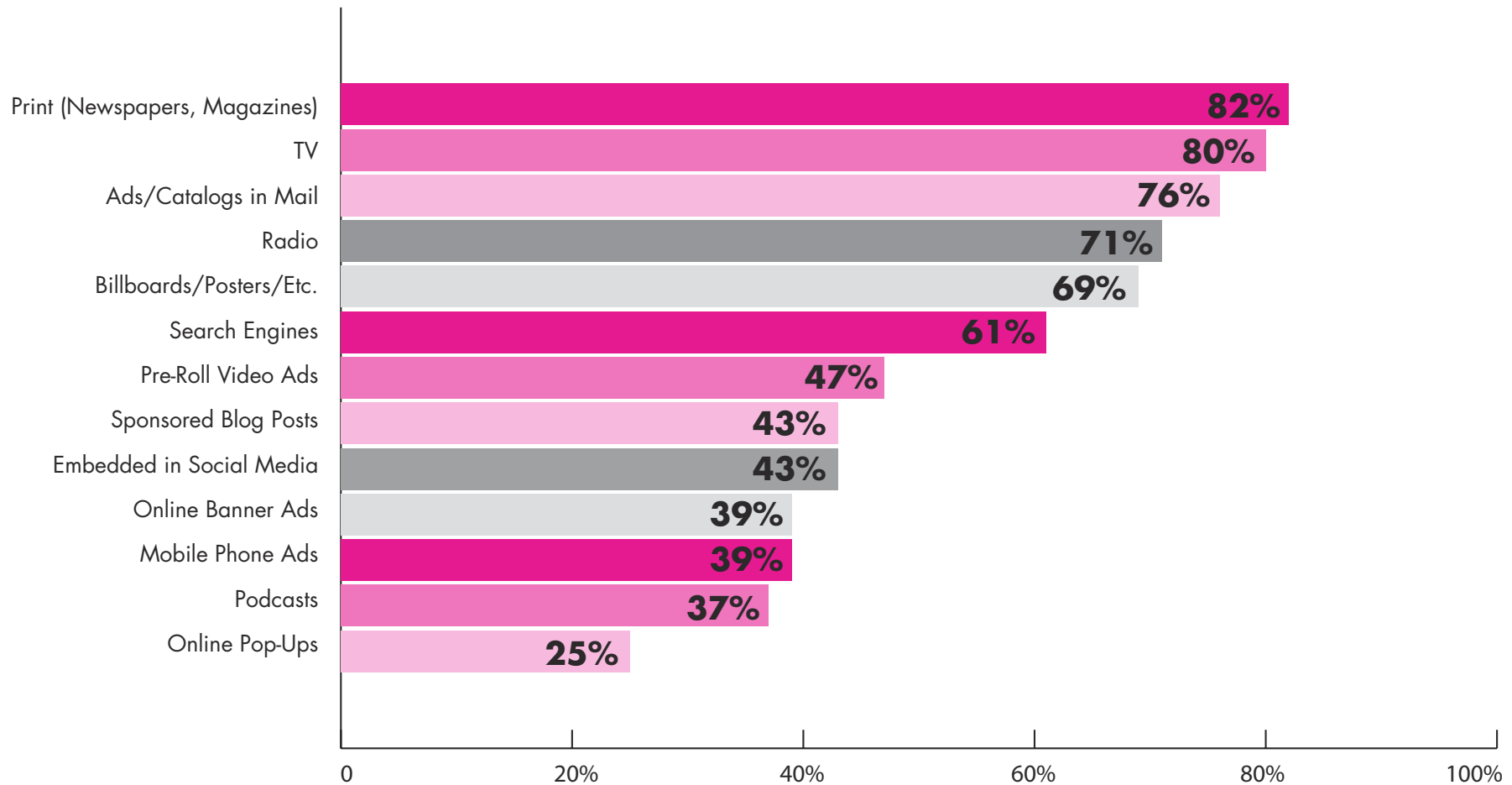
Coupons: Print newspapers are the preferred source for coupons among coupon-clippers.

Verification: Independent, third-party audits allow advertisers to have confidence that their advertising is being delivered as promised.

Source: Nielsen Scarborough USA+, Release 2, 2017. MarketingSherpa, October 2016. Coda's Triad Newspaper Ad Effectiveness Service, January 2016 – February 2018. Alliance of Audited Media website, August 2018.

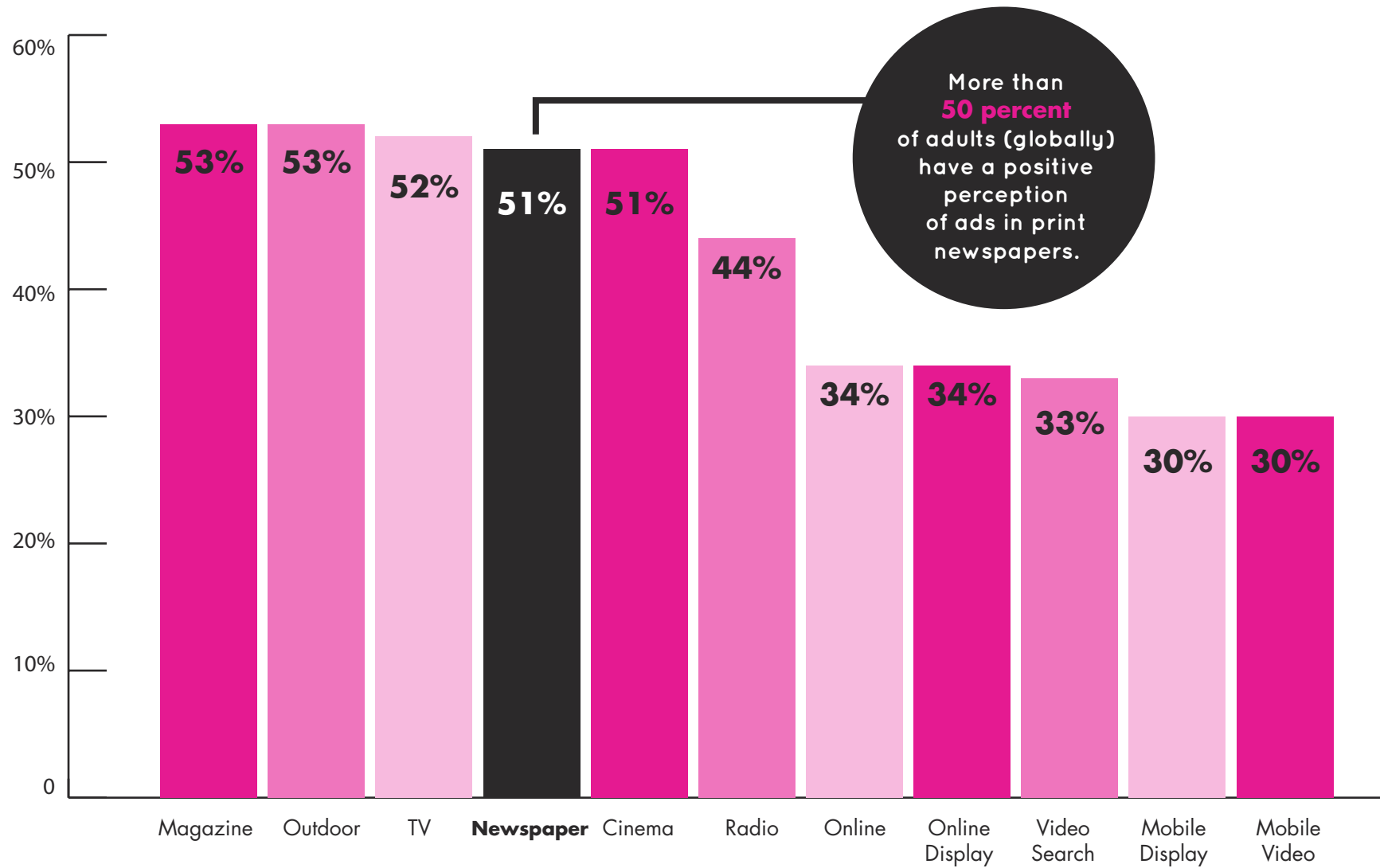
TRUSTED ADVERTISING CHANNELS

When asked which types of advertising channels they trust most, news media consumers say they trust print ads in newspapers and magazines more than any other source.



Source: MarketingSherpa, October 2016.

PERCEPTION OF PRINT NEWSPAPERS



Source: Kantar Millward Brown, February 2018. (Based on a survey of 14,500 16-65 year-olds in 45 countries, conducted in August-September 2017.)

NEWS MEDIA AD IMPACT

Print newspapers score high for recall and likability and are also more likely than other channels to drive reader action, with as many as 83 percent of news media consumers taking action because of printed advertisements.

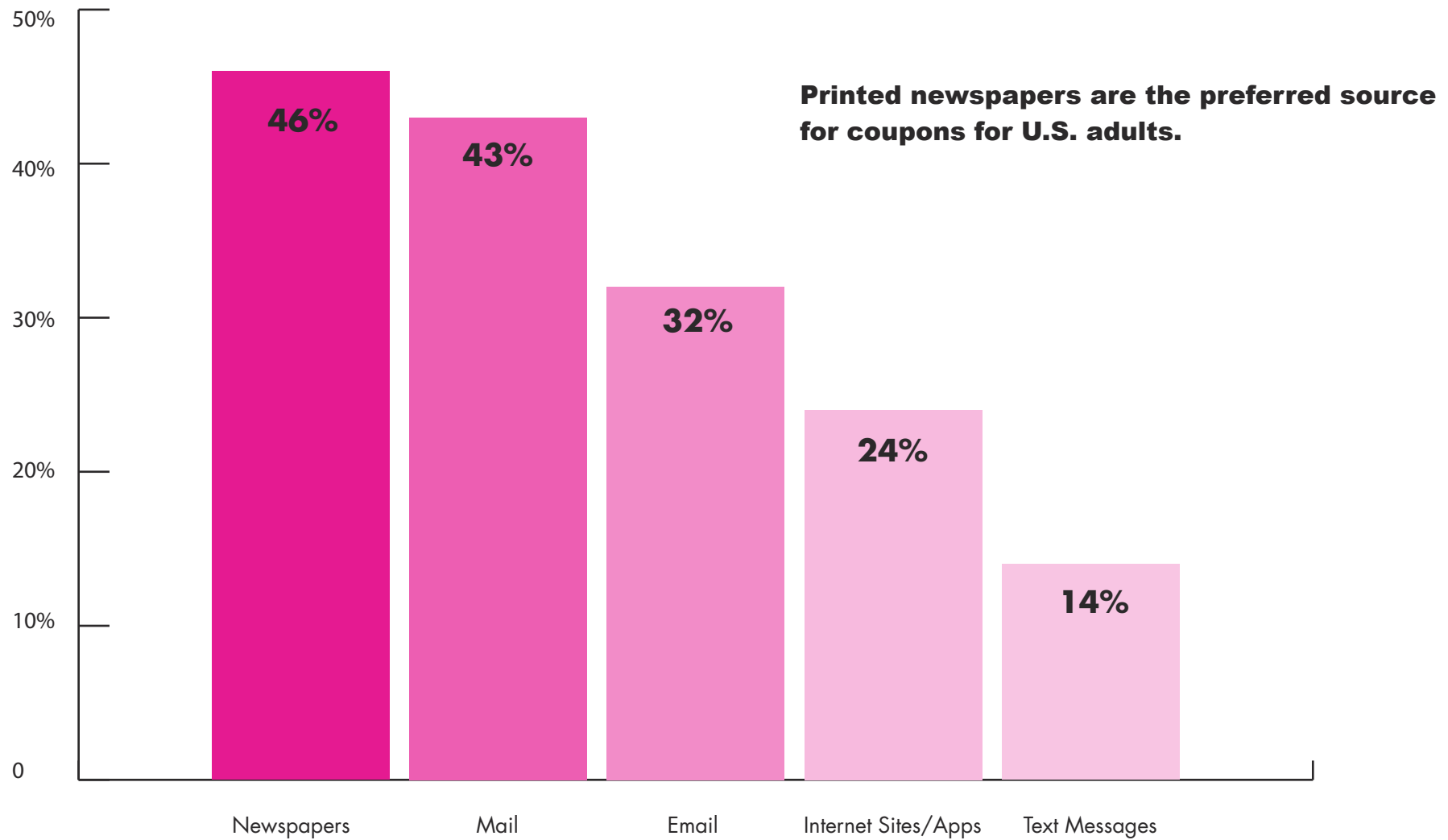
Ad Recall, Action and Likability by Channel

Category	Ad Recall	Reader Actions	Ad Likability
All Display Ads	53%	67%	74%
Circulars/Inserts	66%	71%	73%
Coupons	67%	83%	79%
Drug Stores	71%	73%	70%
Electronics	61%	71%	76%
Grocery Stores	67%	80%	81%
Office Supplies	62%	68%	71%
Sporting Events	64%	69%	83%

Source: Coda's Triad Newspaper Ad Effectiveness Service, January 2016 – February 2018.

Individual newspaper results available from Coda.

COUPONS IN NEWS MEDIA



Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWSPAPER CIRCULARS

Nearly 80 percent of U.S. households rely on circulars and other traditional, printed media sources for product information. Eighty-five percent of U.S. households use circulars they receive at home, while only 40 percent rely on in-store help for product information.

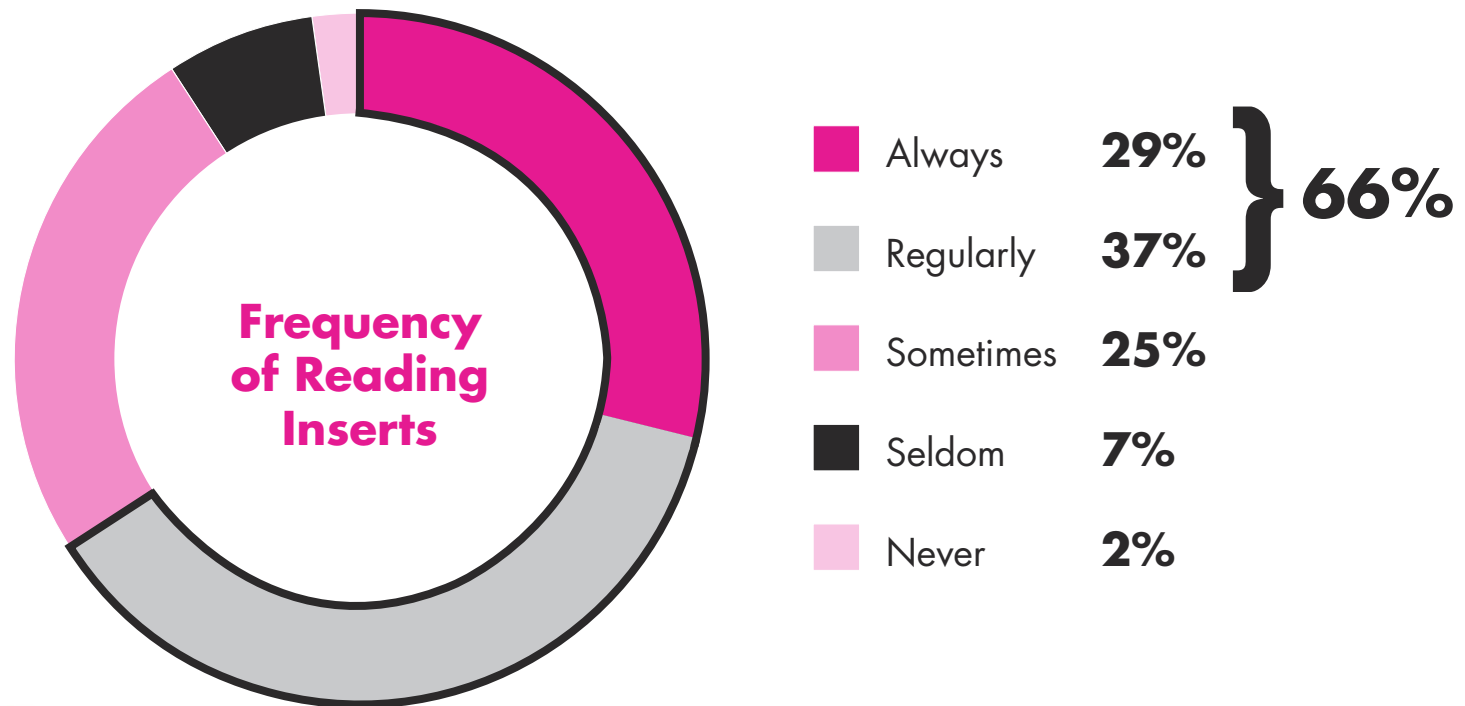
Use of Newspaper Circulars

% Households Using in 2017	
Circular via Home	85%
Circular via Store	79%
Savings Site/Blog	52%
Store Website	77%
Store Emails	75%
Store App	56%
Money-Saving App	52%
Social Media	52%
In-Store Kiosk	40%
Store Text Message	43%

Source: Nielsen Homescan Study, August 2017.

PRE-PRINTED INSERTS

Two-thirds (66%) of American newspaper readers report that they “always” or “regularly” read or look at pre-printed inserts when they appear with issues of their regular newspaper.



Source: Coda's Triad Newspaper Insert Study, October 7-8, 2015.

PRE-PRINTED INSERTS DRIVE ACTION

Nine out of 10 newspaper readers took a specific action as a result of reading or looking at a pre-printed insert that was included with their newspaper.

Reader Actions Taken Because of Printed Advertisements

**Visited a Store, Dealer or
Other Location**

58%

**Clipped Coupons to Use at
the Store**

57%

**Purchased a Product
Advertised in a Newspaper
Insert**

41%

**Considered Purchasing a
Product Advertised in a
Newspaper Insert**

40%

**Brought a Newspaper
Insert with Me When
Shopping**

34%

**Saved a Newspaper Insert
for Future Reference**

33%

Source: Coda's Triad Newspaper Insert Study, October 7-8, 2015.

AFFLUENT, EDUCATED AUDIENCES

The median annual household income of the American news audience is more than \$60k.

AFFLUENT, EDUCATED AUDIENCES

News Media Audience

Employment:

40% are employed in white-collar occupations

Income:

Median annual household income is over **\$60k**

Education:

Median education is **14 years** of formal schooling

Web Audience

Age:

57% of news media website visitors are age **44 or younger**

Income:

Median annual household income is over **\$73k**

Education:

41% have at least an undergraduate college degree

Mobile Audience

Age:

62% of the news media mobile audience is age **44 or younger**

Income:

Median annual household income is over **\$72k**

Source: Nielsen Scarborough USA+, Release 2, 2017.

THE NEWS MEDIA AUDIENCE IS PRIMED FOR ADVERTISING

Audience Demographics

The news media audience is wealthier and better-educated than the average U.S. adult.

	U.S. Adults	News Media Audience
Men	49%	49%
Women	51%	51%
Median Annual HH Income	\$54,700	\$60,600
Median Age	48	51
Undergraduate Degree or Higher	27%	32%
Professional/Managerial Work	25%	27%
White-Collar Work	37%	40%
Homeowner	63%	67%
Median Home Value	\$209,000	\$227,000

The news media audience has a median household income that is **\$5,900** higher than the national average.

Source: Nielsen Scarborough USA+, Release 2, 2017.

THE ONLINE NEWS AUDIENCE

Online News Audience Demographics

	U.S. Adults	Online News Audience
Men	49%	50%
Women	51%	50%
Median Annual HH Income	\$54,700	\$73,600
Median Age	48	41
Undergraduate Degree or Higher	27%	42%
Professional/Managerial Work	25%	39%
White-Collar Work	37%	54%
Homeowner	63%	64%
Median Home Value	\$209,000	\$252,000

The **online** news media audience has a median household income that is nearly **\$19,000** higher than the national average.

The **online news media audience is significantly younger than the print audience, with a median age of 41.**

Source: Nielsen Scarborough USA+, Release 2, 2017. Online news media audience is U.S. adults age 18+ who have visited a newspaper website in the past 30 days.

THE MOBILE NEWS AUDIENCE

Mobile News Audience Demographics

The **mobile** news media audience is the youngest audience, with a median age of 39.

	U.S. Adults	Mobile News Audience
Men	49%	51%
Women	51%	49%
Median Annual HH Income	\$54,700	\$72,500
Median Age	48	39
Undergraduate Degree or Higher	27%	41%
Professional/Managerial Work	25%	37%
White-Collar Work	37%	52%
Homeowner	63%	61%
Median Home Value	\$209,000	\$254,000

The **mobile** news media audience has a median annual household income that is nearly **\$18,000** more than the national average.

Source: Nielsen Scarborough USA+, Release 2, 2017. Mobile news media audience is U.S. adults age 18+ who have read a newspaper on a mobile device in the past 30 days.

NEWS MEDIA AUDIENCE EDUCATION LEVEL

Nearly one-third (32 percent) of the news media audience has a four-year college degree or more (compared with 27 percent for the U.S. as a whole). When viewed more narrowly, nearly two-thirds (65 percent) of people with a four-year degree or more engage with the news media.

Source: Nielsen Scarborough USA+, Release 2, 2017.

News Media Reach by Education Level

Level of Education	Percent Who Engage with News Media
Some college or more	60%
College graduate or more	65%
Some post-graduate or more	70%
Post-graduate degree	70%



NEWS MEDIA AUDIENCE OCCUPATION

Forty percent of the news media audience work in white-collar occupations. When looking more closely at that specific audience, **60 percent** of white-collar workers engage with the news media.

News Media Reach by Occupation

Occupation	Percent Who Engage with News Media
Management, business and financial operations	60%
Professional and related occupations	60%
Sales and office	54%
White-collar occupations	58%



Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA AUDIENCE

HOME VALUE

Seventy percent of those with homes valued at \$1 million or more are engaged members of the news media audience.

News Media Audience by Value of Owned Home

Value of Home	Percent Who Engage with News Media
\$500k or more	68%
\$750k or more	70%
\$1 million or more	71%
\$2 million or more	70%

The news media audience has a median home value of **\$227,000**. That's **\$18,000** more than the national median of **\$209,000**.



Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA AUDIENCE

GENDER & AGE

Digital and Mobile News Media Reach by Demographic

Demographic	Total Audience % Composition	Total Audience Index	Visited a News Site in the Past 30 days % Composition	Visited a News Site in the Past 30 days Index	Read News on a Mobile Device in the Past 30 Days % Composition	Read News on a Mobile Device in the Past 30 Days Index
Men	49%	101	50%	103	51%	105
Women	51%	99	50%	97	49%	95
Age 18-34	26%	87	37%	124	41%	136
Age 35-44	15%	92	20%	125	21%	127
Age 45-54	17%	97	18%	104	17%	101
Age 55 and Older	42%	116	25%	68	21%	58

Indexes above 100 indicate that the news media audience is more likely to be part of these demographic groups.

News media reach younger adults (ages 18-34) via websites and mobile.

Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA AUDIENCE

INCOME

Digital and Mobile News Media Reach by Income Level

Income	Total Audience % Composition	Total Audience Index	Visited a News Site in the Past 30 days % Composition	Visited a News Site in the Past 30 days Index	Read News on a Mobile Device in the Past 30 Days % Composition	Read News on a Mobile Device in the Past 30 Days Index
Less than \$50,000	43%	91	33%	71	35%	74
\$50,000- \$74,999	17%	101	18%	105	17%	101
\$75,000- \$99,999	15%	106	16%	117	16%	112
\$100,000- \$149,999	14%	110	18%	139	17%	137
\$150,000- \$249,999	8%	116	10%	154	10%	154
\$250,000 or More	4%	121	5%	163	5%	168

Indexes above 100 indicate that the news media audience is more likely to be part of these demographic groups.

Source: Nielsen Scarborough USA+, Release 2, 2017.

News media reach higher-income adults (\$75,000-149,999) via news websites and on mobile devices.

DIGITAL & MOBILE REACH

Digital and Mobile News Media Reach by Education Level

Education	Total Audience % Composition	Total Audience Index	Visited a News Site in the Past 30 days % Composition	Visited a News Site in the Past 30 days Index	Read News on a Mobile Device in the Past 30 Days % Composition	Read News on a Mobile Device in the Past 30 Days Index
High-School Graduate or Less	36%	86	26%	63	28%	67
Some College	32%	102	32%	102	31%	99
College Graduate	17%	112	22%	145	22%	142
Some Post-Graduate	3%	126	4%	171	3%	159
Post-Graduate	12%	129	16%	168	16%	167

Indexes above 100 indicate that the news media audience is more likely to be part of these demographic groups.

News media reach adults with college undergraduate degrees and higher via news websites and on mobile devices.

Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA AUDIENCE

OCCUPATION

Digital and Mobile News Media Reach by Employment Level

Occupation	Total Audience % Composition	Total Audience Index	Visited a News Site in the Past 30 days % Composition	Visited a News Site in the Past 30 days Index	Read News on a Mobile Device in the Past 30 Days % Composition	Read News on a Mobile Device in the Past 30 Days Index
Management, Business and Financial Operations	12%	111	16%	151	16%	147
Professional and Related Occupations	16%	110	23%	159	22%	153
Sales and Office	13%	99	15%	119	15%	115
White-Collar Occupations	40%	106	54%	143	52%	138

News media reach adults in professional and management and related roles – particularly white-collar occupations – via news websites and on mobile devices.

Indexes above 100 indicate that the news media audience is more likely to be part of these demographic groups.

ENGAGED AUDIENCES

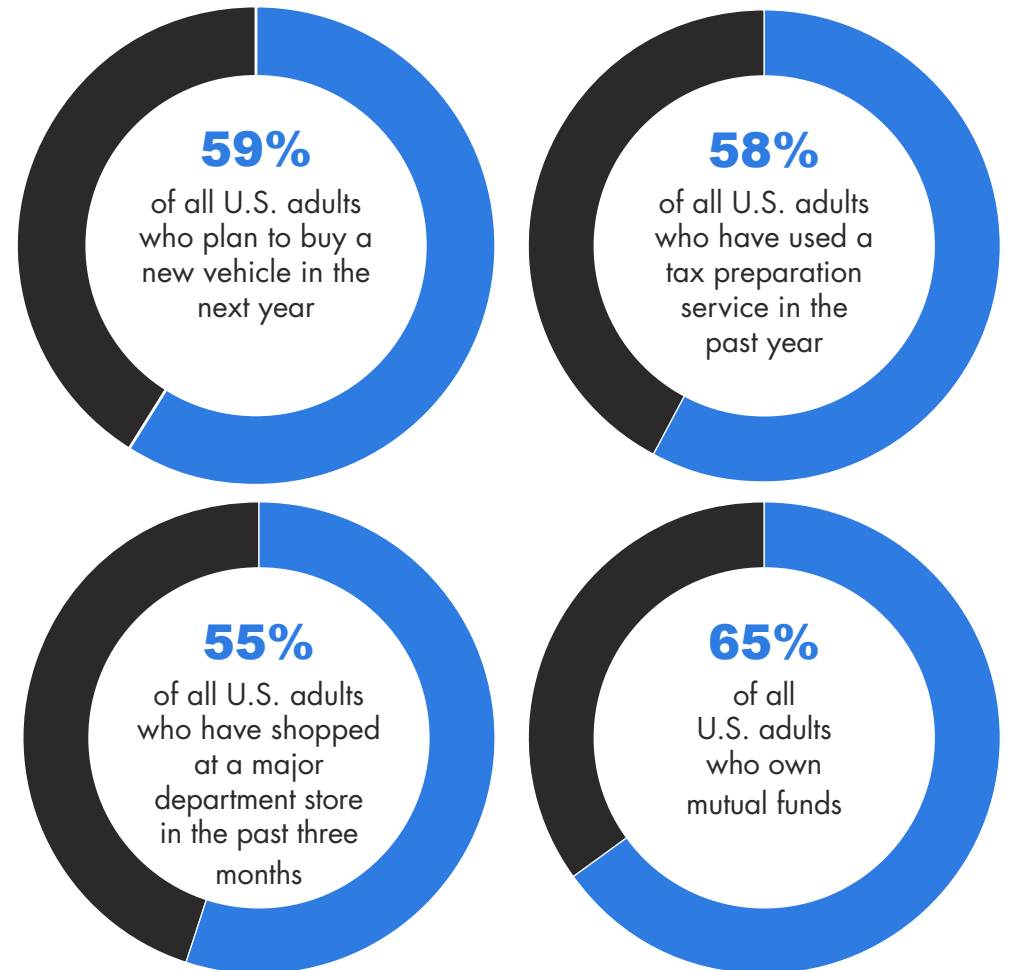
News media outlets offer superior coverage of shoppers across multiple categories.

ENGAGED AUDIENCES

News media provide superior coverage of shoppers across multiple industries, reaching between 55 and 65 percent of shoppers in these categories.



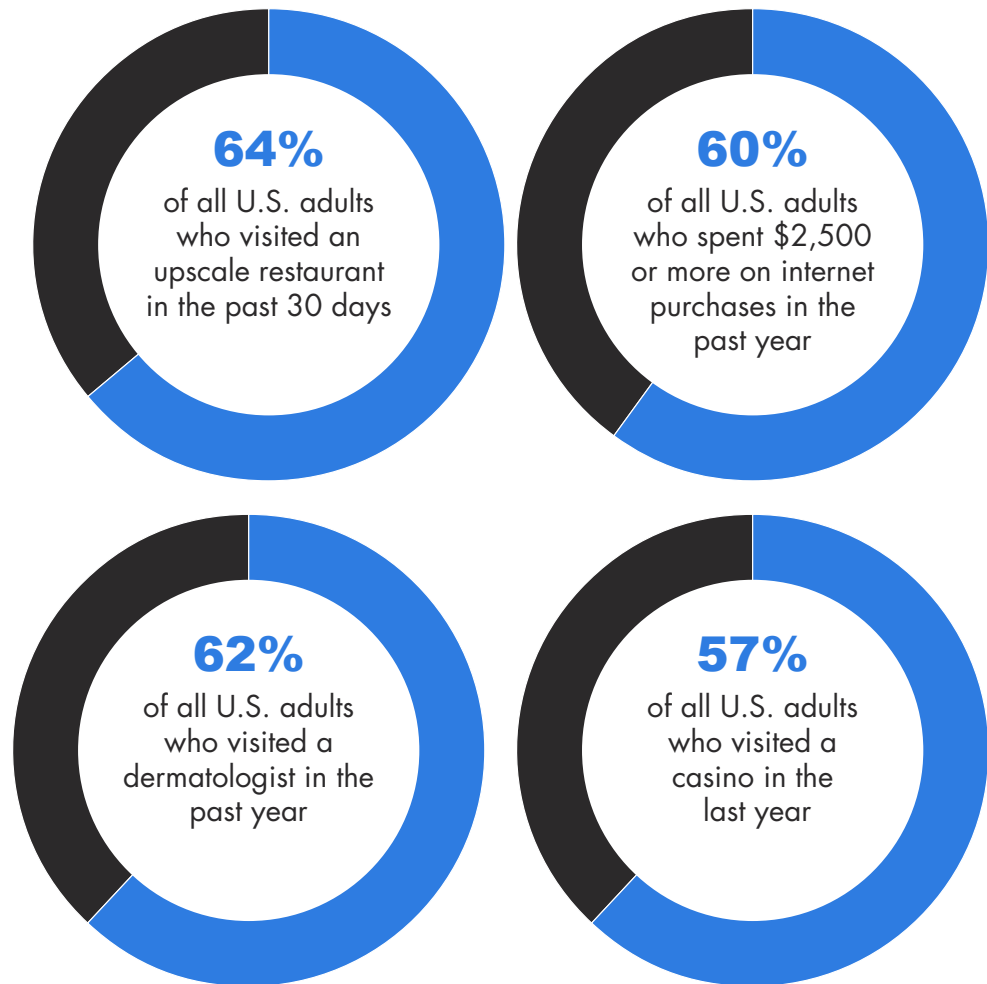
Each week, news media reach:



Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

Each week, news media reach:



Not Just Shoppers

The news media audience spends more than the average adult on a variety of products and services.



Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

RETAIL SHOPPING

On the next several pages, we frequently refer to audience Composition, which is the percentage of the news media audience within each demographic or behavioral group. In comparison, when we say Coverage or Reach, we are referring to the unduplicated number or percentage of adults exposed to news media.

Each week, news media reach 56 percent of all U.S. adults who have shopped at a bookstore in the past year. When looking just at the news media audience, 70 percent have shopped at a bookstore in the same period.

News Media Audience Engagement with Retail (Past Year)

Type of Retail Store	Weekly Coverage	Composition
Bookstore	56%	70%
Bridal Shop	55%	3%
Carpet/Floor Covering	56%	27%
Consumer Electronics	56%	61%
Day Spa	58%	7%
Dry Cleaner	63%	19%
Florist	62%	13%
Furniture/Mattress	56%	52%
Hardware/Paint/Lawn & Garden	56%	73%
Home Accessories	55%	78%
Jewelry	60%	17%
Large Appliances	56%	29%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

RETAIL SHOPPING

Retail Shoppers (Past Three Months)

Type of Retail Store	Weekly Coverage	Composition
Bookstore	56%	59%
Clothing	55%	84%
Day Spa	58%	4%
Dry Cleaner	64%	13%
Florist	62%	8%
Home Accessories	55%	65%
Jewelry	60%	10%
Major Department Store	55%	97%
Mall/Shopping Center	55%	85%
Office Supplies/Services	57%	50%
Shoes/Footwear	55%	73%
Sporting Goods	55%	44%



Each week, news media reach 55 percent of all U.S. adults who have shopped at a clothing store in the past three months, but of the news media audience, 84 percent have shopped here.

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

RETAIL SHOPPING



Retail Buyers (Past Year)

Type of Retail Store	Weekly Coverage	Composition
Carpet/Floor Covering	56%	21%
Consumer Electronics	56%	53%
Furniture/Mattress	56%	34%
Hardware/Paint/Lawn & Garden	56%	69%
Large Appliances	57%	23%

Each week, news media reach **56 percent** of all U.S. adults who have made a purchase at a furniture/mattress store in the past year. Approximately one-third of the news media audience has made a purchase at a furniture/mattress store in the past year.

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

RETAIL SHOPPING

Shoppers Who Spent \$500 or More on Retail Items (Past Year)

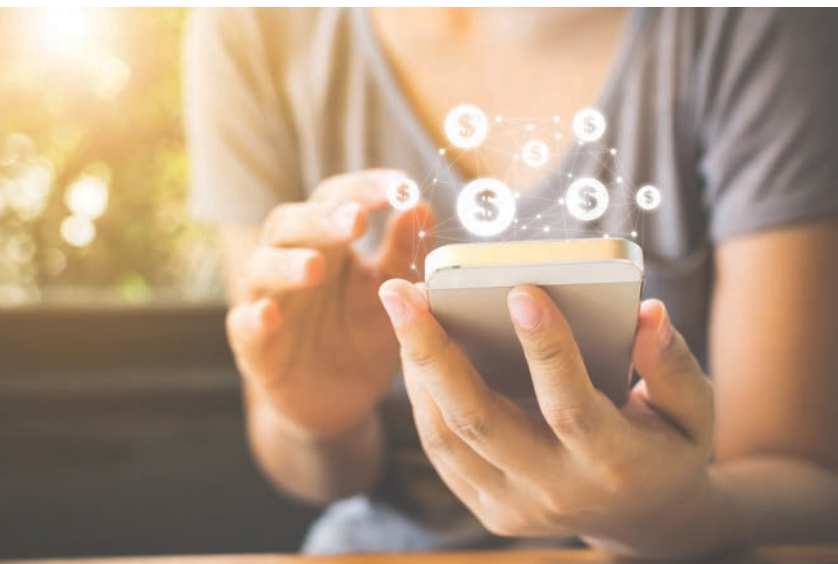
Items Purchased	Weekly Coverage	Composition
Athletic Shoes	56%	1%
Cosmetics/Perfume	57%	1%
Fine Jewelry	58%	4%
Men's Business Clothing	64%	2%
Men's Shoes	60%	1%
Skin Care Items	59%	1%
Sports Equipment	57%	2%
Women's Business Clothing	58%	1%
Women's Shoes	56%	1%



Each week, news media reach 64 percent of all U.S. adults who have spent \$500 or more on men's business clothing in the past year.

ENGAGED AUDIENCES

RETAIL SPENDERS



Shoppers Who Spent \$3,000 or More on Retail Items (Past Year)

Item Purchased	Weekly Coverage	Composition
Camera or Accessories	73%	>1%
Carpet/Floor Covering	56%	4%
Draperies/Blinds/Window Treatments	57%	>1%
Furniture	60%	3%
Mattress	62%	1%
Television	60%	>1%
Other Consumer Electronics	62%	>1%

More than **63 percent** of the news media audience agrees with the statement, “I am typically willing to pay more for high-quality items.”

Each week, news media reach **62 percent** of all U.S. adults who have spent \$3,000 or more on a mattress in the past year.

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

AUTOMOTIVE

Each week, news media reach **58 percent** of all U.S. adults who plan to buy a new vehicle in the next year. Of the news media audience, **9 percent** plan to buy a new vehicle in the next year.

Vehicle Buying Behaviors

	Weekly Coverage	Composition
Household plans to buy a new vehicle in the next year	58%	9%
Household plans to lease a vehicle in the next year	56%	4%

Make of Any Vehicle Owned or Leased by Household

	Weekly Coverage	Composition
Audi	62%	<1%
BMW	60%	2%
Lexus	63%	3%
Mercedes	58%	2%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

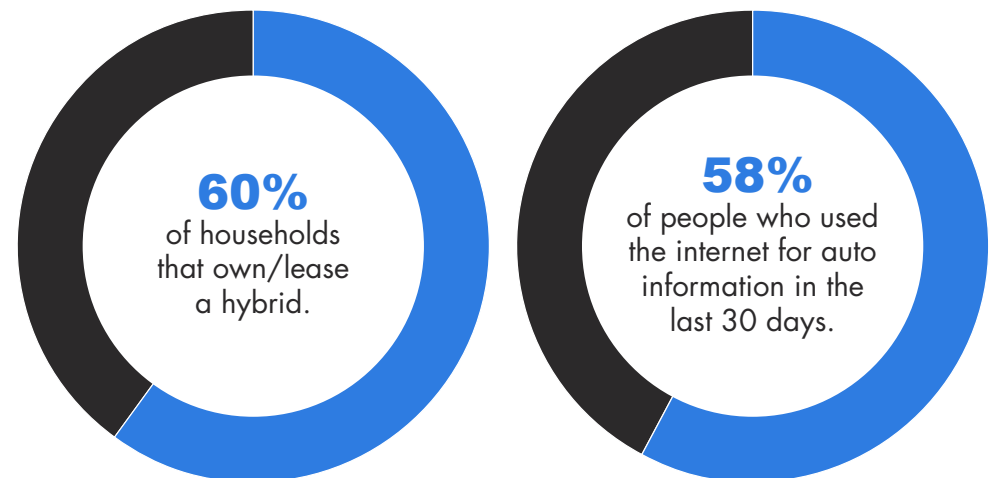
AUTOMOTIVE

Spending on Next New Vehicle

	Weekly Coverage	Composition
Household Plans to Spend \$35k or More on Next New Vehicle	62%	2%
Household Plans to Spend \$45k or More on Next New Vehicle	62%	1%



News Media Reach:



Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

FINANCIAL SERVICES / INVESTMENTS

Each week, news media reach 65 percent of all U.S. adults who own mutual funds.
Of the news media audience, 18 percent own mutual funds.

Financial Services Household Has/Uses

	Weekly Coverage	Composition
Certificate of Deposit (CD)	64%	9%
Home Improvement/Home Equity Loan	62%	7%
Home Mortgage	57%	29%
Money Market Account	64%	15%
Online Bill Paying	57%	37%
Refinanced Home Mortgage	61%	7%
Savings Account	56%	71%

Investments Household Has

	Weekly Coverage	Composition
529/College Savings Plan	62%	6%
Bonds	66%	10%
IRA	62%	34%
Mutual Funds	65%	18%
Second Home/Real Estate	62%	10%
Stock/Options	63%	22%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

HEALTHCARE

Each week, news media reach **61 percent** of all U.S. adults who have taken medication to control their cholesterol in the past year. Of the news media audience, **18 percent** have taken medication to control their cholesterol in the past year.

Reasons Bought Medications in the Past Year

	Weekly Coverage	Composition
Arthritis	59%	12%
Cholesterol Control	61%	18%
Diabetes	56%	10%
Digestive Disorders (Acid Reflux, Ulcer, Etc.)	57%	16%
High Blood Pressure	59%	26%

Health Specialists Used in the Past Year

	Weekly Coverage	Composition
Cardiologist	61%	13%
Cosmetic Surgeon	58%	1%
Dermatologist	62%	16%
Ophthalmologist	59%	36%
Orthopedist	58%	7%
Physical Therapist	58%	10%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

PROFESSIONAL SERVICES

Each week, news media reach approximately **60 percent** of those who used a professional service in the last year. Of the news media audience, **29 percent** have used a tax preparation service in the past year.

Professional Services Used by Household in Past Year

	Weekly Coverage	Composition
Accountant	63%	14%
Financial Planner	64%	16%
Funeral Pre-Planning	64%	2%
Insurance Agent (Local Office, Not Online)	60%	14%
Online Investing/Stock Trading	64%	8%
Stockbroker	66%	7%
Tax Preparation	58%	29%
Travel Agent	65%	6%



Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

RESTAURANT / FOOD

Each week, news media reach **64 percent** of all U.S. adults who have eaten at an upscale restaurant in the past 30 days.

Food-Related Behavior

	Weekly Coverage	Composition
Ate at a Sit-Down Restaurant 5 or More Times in the Past 30 Days	59%	29%
Ate at a Quick-Service Restaurant 5 or More Times in the Past 30 Days	54%	49%

Type of Restaurant Visited in the Past 30 Days

	Weekly Coverage	Composition
Any Upscale Restaurant	64%	14%
Any Italian Restaurant	62%	20%
Any Coffee House/Coffee Bar	60%	17%
Any Sports Bar	59%	14%

Source: Nielsen Scarborough USA+, Release 2, 2017.



ENGAGED AUDIENCES

RESTAURANT / FOOD

Wine Purchases

	Weekly Coverage	Composition
Drink Wine Three Times a Week or More	64%	9%
Usual Price Range for a Bottle of Wine Bought at a Store = \$20	61%	3%

Food/Restaurant Information

	Weekly Coverage	Composition
Generally Read/Look At the Food/Cooking Pages/Section of the Newspaper	65%	33%
Used the Internet for Restaurant Information in the Past 30 Days	58%	41%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

TRAVEL

Each week, news media reach **57 percent** of all U.S. adults who have visited a casino in the past year. Of the news media audience, **34 percent** have visited a casino in the past year.

Travel Done in the Past Year

	Weekly Coverage	Composition
Rented a Car	59%	33%
Visited a Casino	57%	34%
Stayed at a Bed & Breakfast	62%	5%
Stayed at an Upscale Hotel	62%	9%
Took 3 or More Domestic Air Round Trips	61%	16%
Took 3 or More Trips Outside the Continental U.S.	59%	4%

Type of Vacations Plan to Take in the Next Year

	Weekly Coverage	Composition
All-Inclusive Resort	57%	10%
Cruise	57%	13%
Escorted Tour/Tour Group	67%	4%
Gambling/Casino Trip	57%	10%
Golf or Tennis Vacation	66%	2%
Ski Vacation	61%	3%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

ONLINE SHOPPERS / BUYERS

Online Spending

	Weekly Coverage	Composition
Spent \$1k or More on Internet Purchases in the Past Year	59%	26%
Spent \$2,500 or More on Internet Purchases in the Past Year	60%	12%

Each week, news media reach 60 percent of all U.S. adults who spent \$2,500 or more on internet purchases in the past year. Of the news media audience, 12 percent have spent \$2,500 or more on internet purchases in the past year.

Items Purchased on the Internet in the Past Year

	Weekly Coverage	Composition
Cultural Event Tickets	66%	8%
Sporting Event Tickets	62%	10%
Airline Tickets	61%	27%
Other Travel Reservations (Hotels, Car Rental, Etc.)	60%	24%
Flowers	60%	7%
Computer Hardware/ Software)	60%	11%
Consumer Electronics	59%	12%
Books	59%	31%
Wine	59%	5%
Mobile Device Apps	59%	13%

Source: Nielsen Scarborough USA+, Release 2, 2017.

ENGAGED AUDIENCES

VOTING BY THE NUMBERS

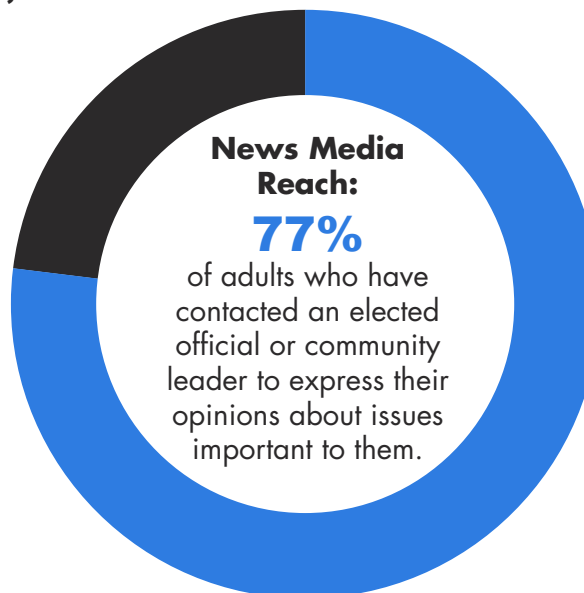
122 million – number of registered voters news media reach each week. **That's 64 percent of all U.S. registered voters.**

Compared to the average U.S. adult, the news media audience is:

7%
more likely to always vote in **presidential** elections.

12%
more likely to always vote in **local and state** elections.

More than 86 percent of the adult news media audience is registered to vote.



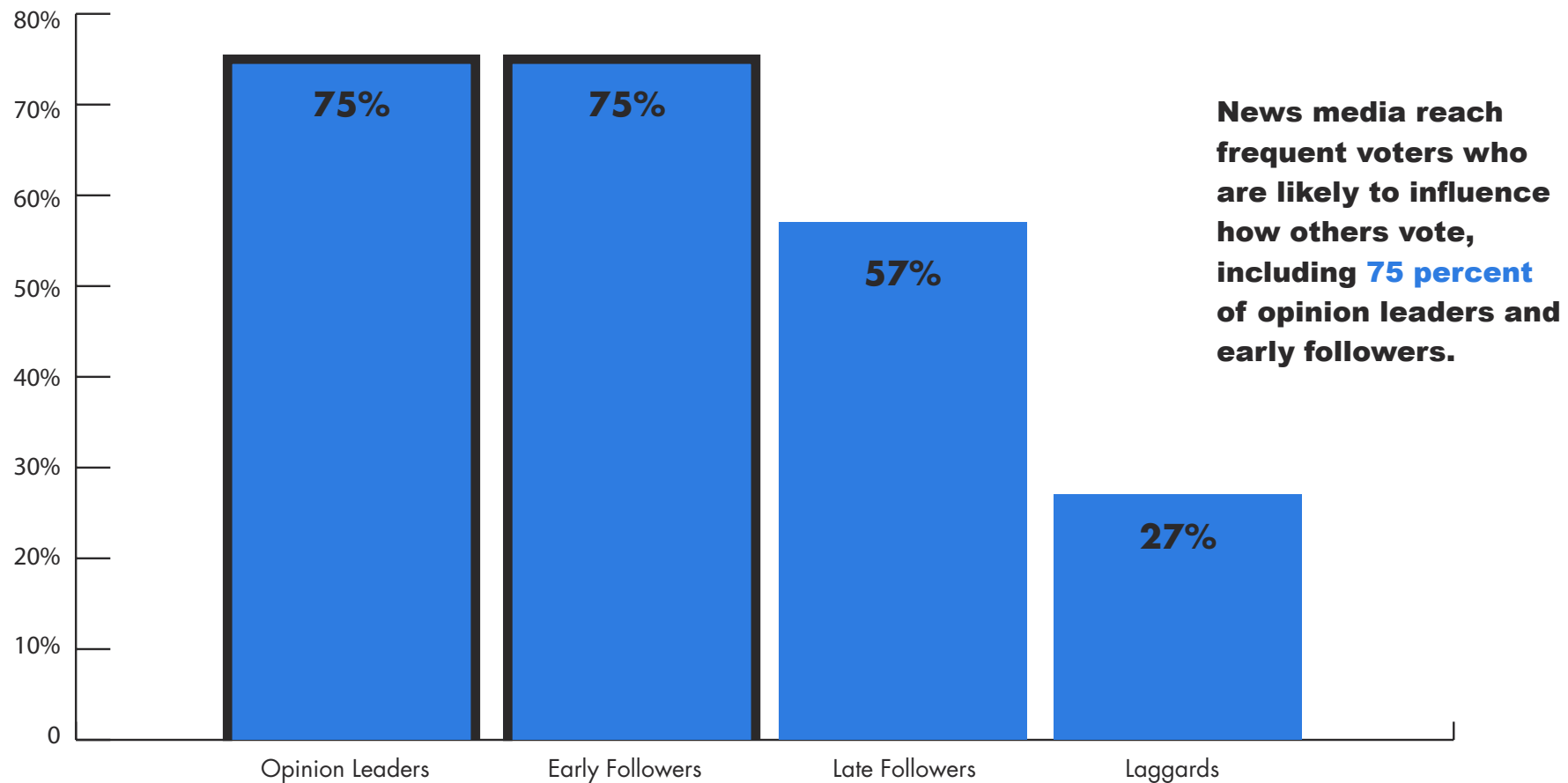
People who consume news media are **24 percent** more likely to have contributed money to a political organization in the past 12 months than the average U.S. adult.



Source: Nielsen Scarborough USA+, Release 2, 2017. News Media Alliance Political Study, April 2016.

ENGAGED AUDIENCES VOTING INFLUENCERS

Electoral Influencers



Source: News Media Alliance Political Study, April 2016.

ENGAGED AUDIENCES

CHARITABLE GIVING

News media audiences contribute to organizations and causes that are important to them and are as much as **25 percent** more likely to donate than the average U.S. adult.

Percent Likelihood News Media Audiences Are More Likely to Donate

Arts/Cultural	Political	Social Care/Welfare	Public Radio	Public Television	Educational/Academic
25%	24%	21%	17%	14%	13%

Source: Nielsen Scarborough USA+, Release 2, 2017.



REACH

Print and online news media reach 136 million U.S. adults every week.

NEWS MEDIA REACH

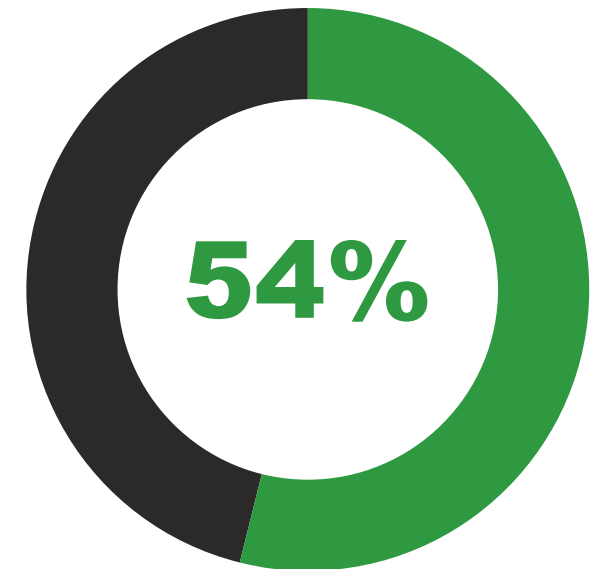


<p>National Reach: News media reach 136 million U.S. adults each week, or 54 percent of all U.S. adults.</p>	<p>Coverage: News media reach across all age groups, including 49 percent of adults age 18–49.</p>	<p>Print: Forty-four percent of the news media audience turns exclusively to print.</p>	<p>Digital: News media sites receive over 200 million unique visits and 6.7 billion page views per month.</p>
<p>Growth: The digital audience for news media is growing, especially on mobile devices.</p>	<p>Scale: Networks of news media have aggregate audiences in the millions.</p>	<p>Local Reach: Most local news media companies can reach more adults in their local markets than any other local media.</p>	<p>Targeting: News media have the ability to target your messages to the right audience, at the right time, in the right environment.</p>

Sources: Nielsen Scarborough USA+, Release 2, 2017; Nielsen Scarborough USA+, Release 2, 2011 (current six months) through Release 2, 2017 (current six months); comScore, May 2015 and May 2018; Company websites, August 2018.

NEWS MEDIA'S IMPRESSIVE REACH

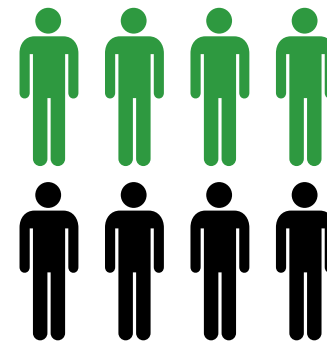
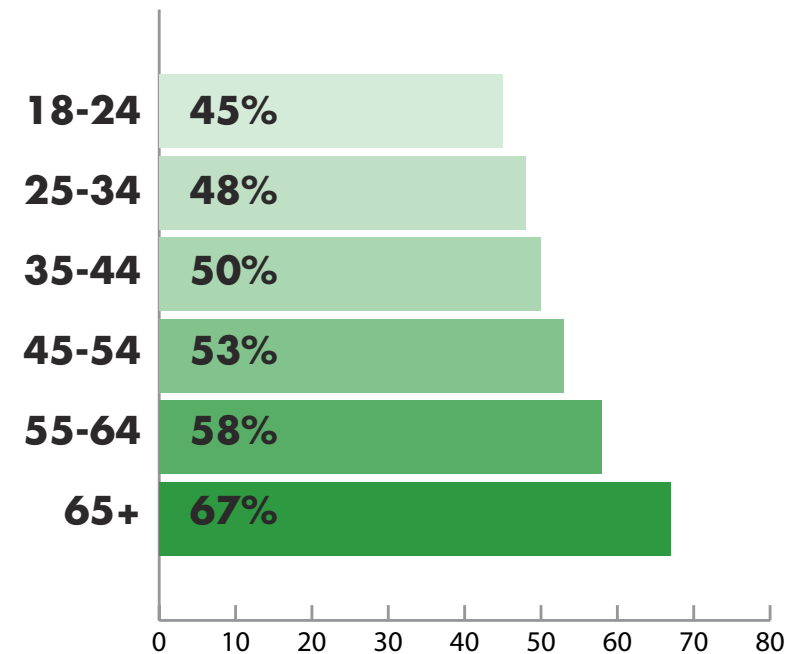
Of the more than 251 million U.S. adults over age 18, news media reach more than 136 million. **That's more than half of all U.S. adults.**



Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA REACH BY GENDER AND AGE

News media sources reach **nearly half** of all adult age groups each week



55% of adult men engage with news media each week

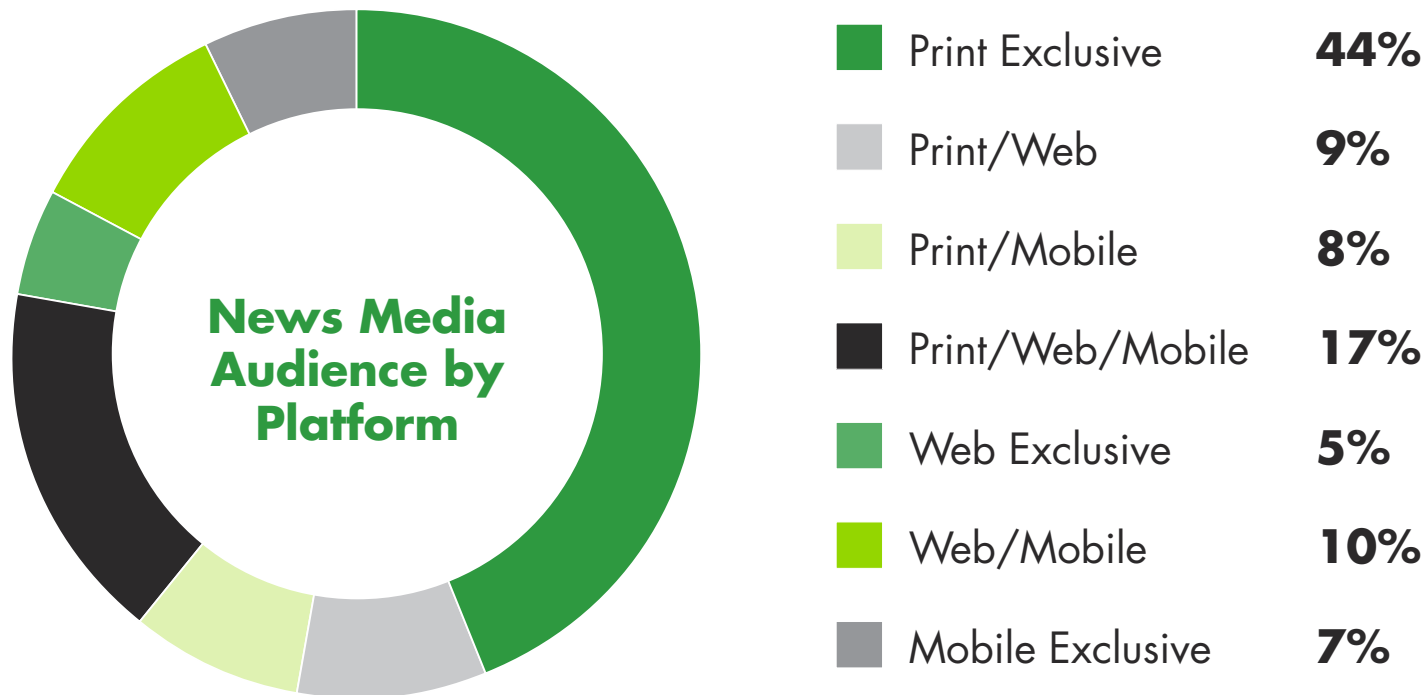


News media reach 54% of adult women each week

Source: Nielsen Scarborough USA+, Release 2, 2017.

NEWS MEDIA REACH BY FORMAT

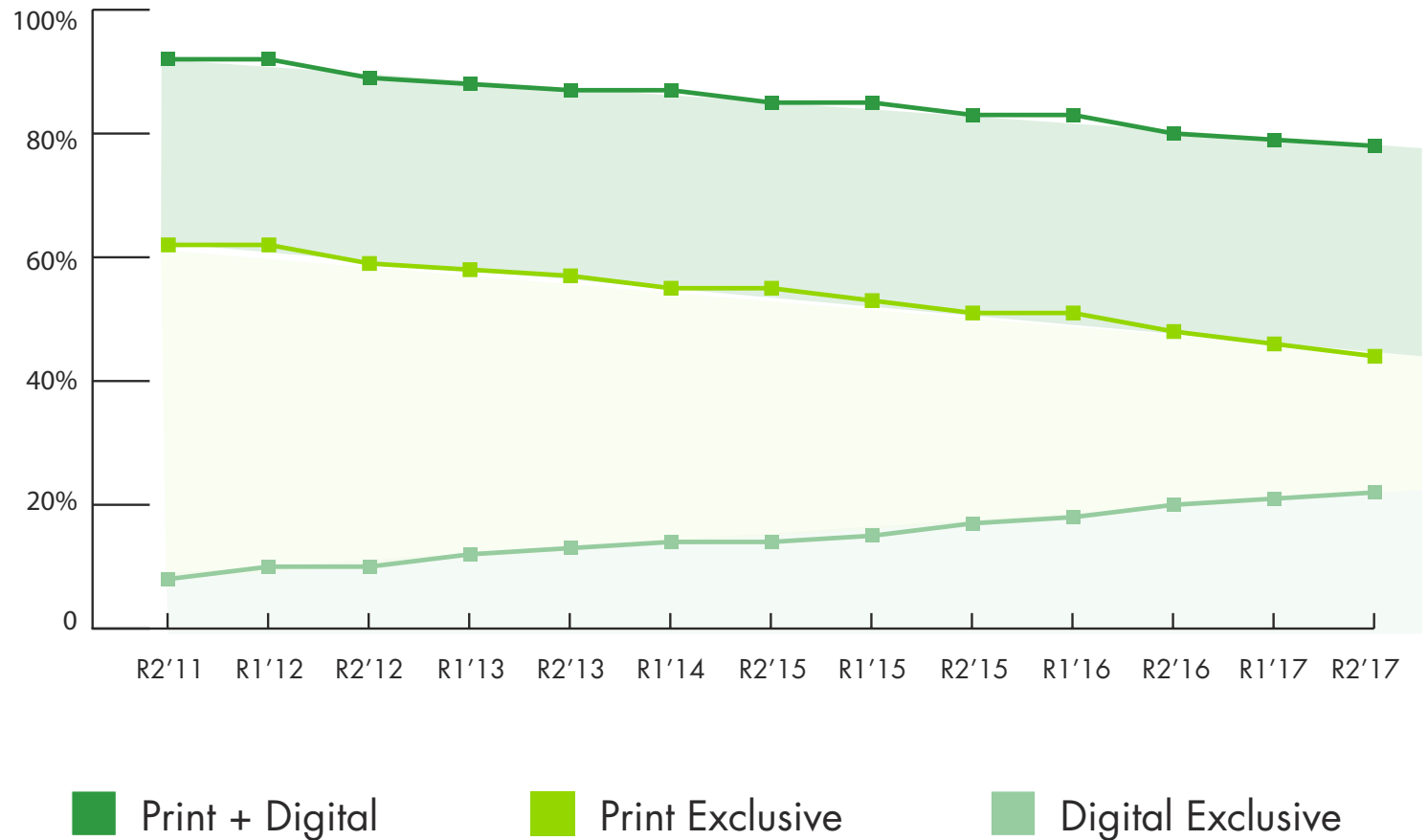
While print is still an important platform, the news media audience is accessing content on a variety of digital platforms as well.



Source: Nielsen Scarborough USA+, Release 2, 2017.

DIGITAL-EXCLUSIVE AUDIENCE

The news media audience is becoming more digital over time. Since 2011, digital-exclusive audiences have increased from 8 percent to 22 percent.



Source: Nielsen Scarborough USA+, Release 2, 2011 (current six months) through Release 2, 2017 (current six months).

NEWS MEDIA ONLINE REACH

News media websites deliver a massive audience each month, drawing **more than 200 million** unique monthly visitors.

News Media Website Visit Data by Type

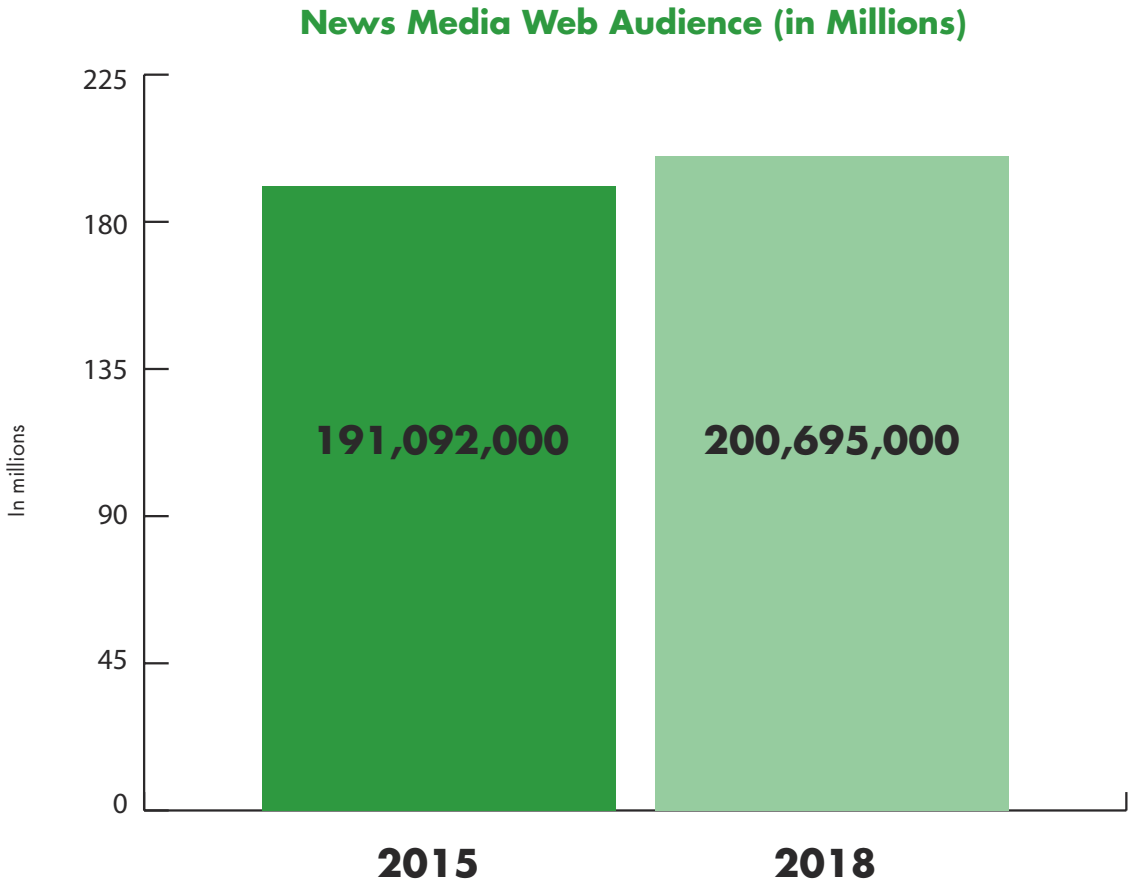
	Unique Visitors	Page Views	Total Minutes Viewed
Desktop	93 million	3.6 billion	3.3 billion
Mobile	181 million	3.2 billion	5.2 billion
Total	201 million	6.7 billion	8.6 billion

*Totals are not sums, as there is audience crossover.

Source: comScore, May 2018.

NEWS MEDIA WEB AUDIENCE

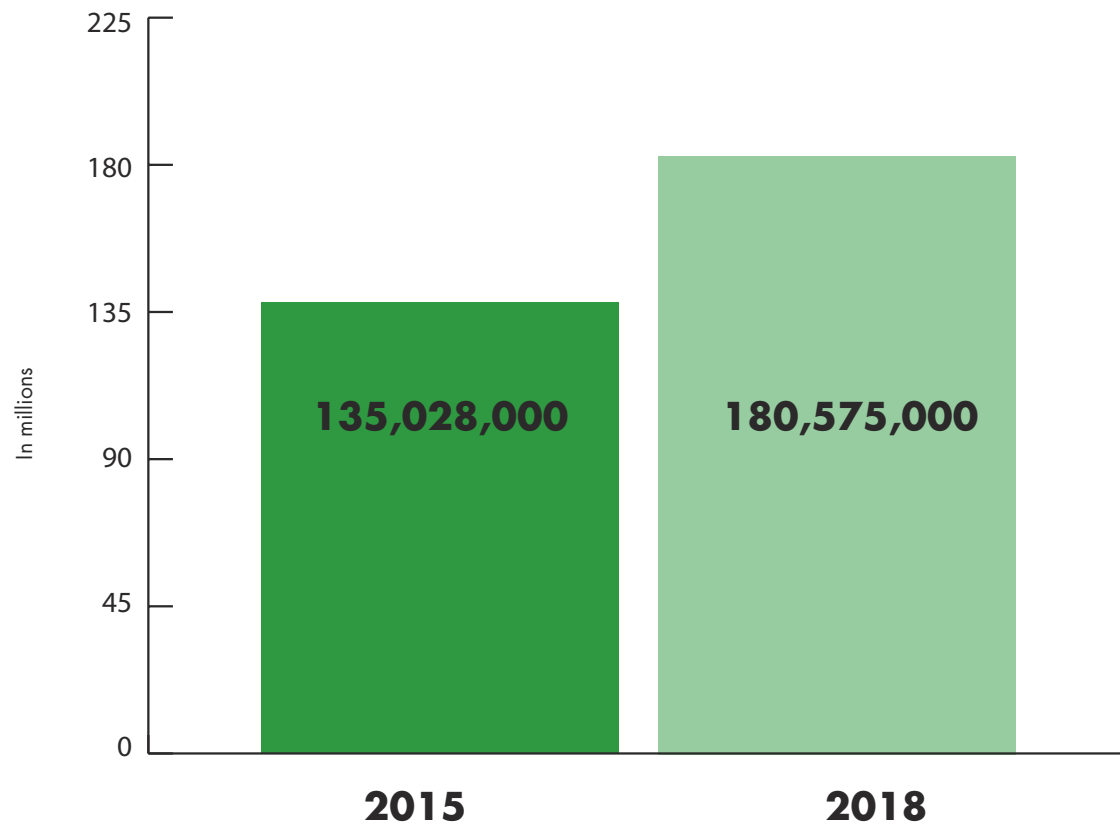
The news media website audience continues to grow. In the past three years, the web audience for news media has grown by more than 5 percent, from 191 million to 200 million.



Source: comScore, May 2015 and May 2018.

NEWS MEDIA MOBILE AUDIENCE

Mobile News Audience (in Millions)

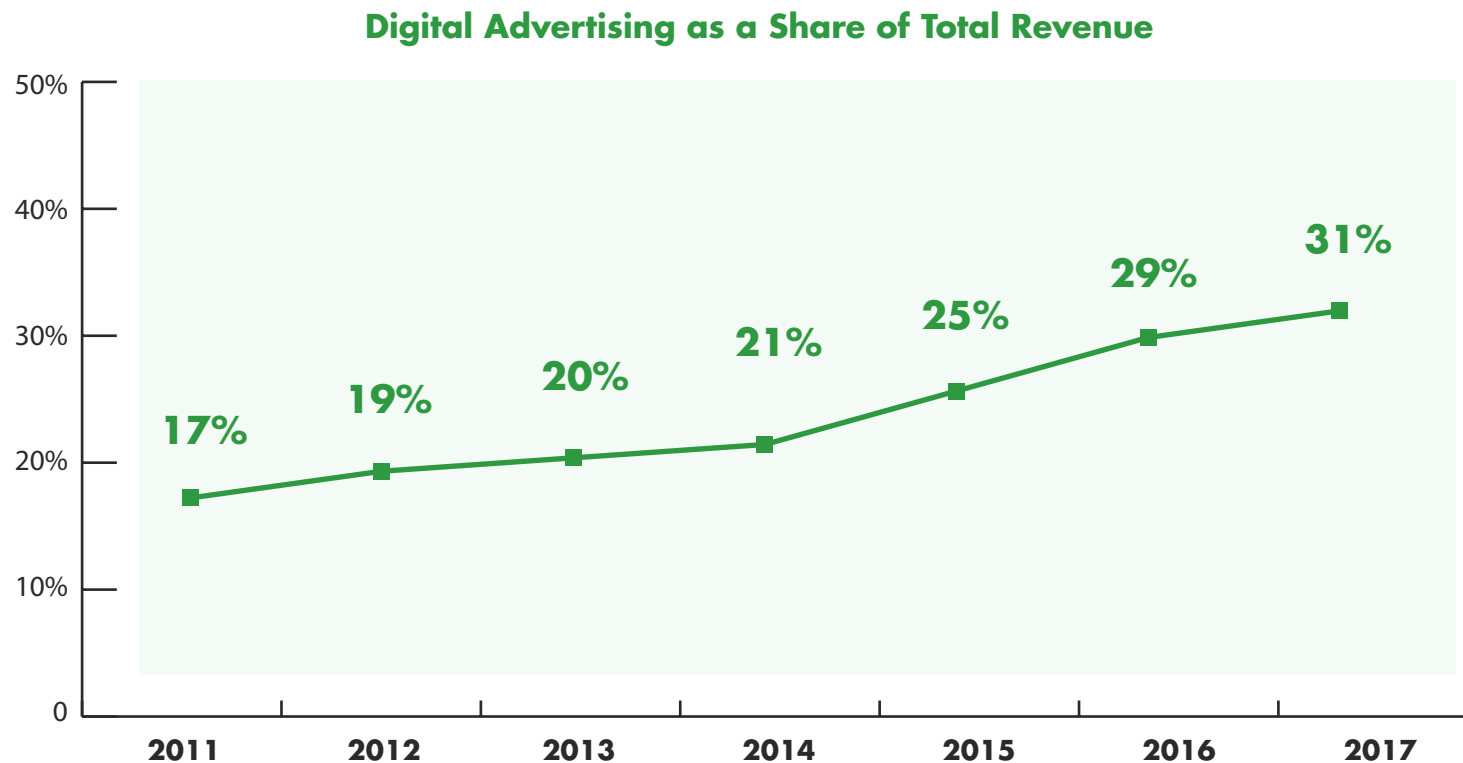


The news media **mobile** audience has seen steep growth. In the past three years, the mobile audience for news media has grown nearly **34 percent**, from 135 million to 180 million.

Source: comScore, May 2015 and May 2018.

DIGITAL AD REVENUE

Digital advertising revenue has nearly doubled in the past seven years and now makes up a growing share of the total advertising revenue at news media companies.



Source: Newspaper Fact Sheet, Pew Research Center, June 2017.

NETWORKS OF NEWS MEDIA OUTLETS

Networks of news media outlets provide unrivaled breadth and depth of audience that a single news outlet is unlikely to achieve on its own.



Nucleus attracts more than **158 million** unique monthly visitors through the aggregation of premium inventory from the leading news media brands.



More than **125 million** unique monthly visitors access content from the USA TODAY NETWORK. USA TODAY's national brand draws 2.4 million daily users, while the local network attracts 6 million daily readers.



McClatchy reaches **78 million** unique daily readers online, 4 million daily print readers and 6 million Sunday print readers. They also reach an audience of 7 million through their print community and advertising products.



GateHouse Media publishes 145 daily newspapers, 340 community publications and more than 570 local-market websites that reach more than **23 million** people combined each week.



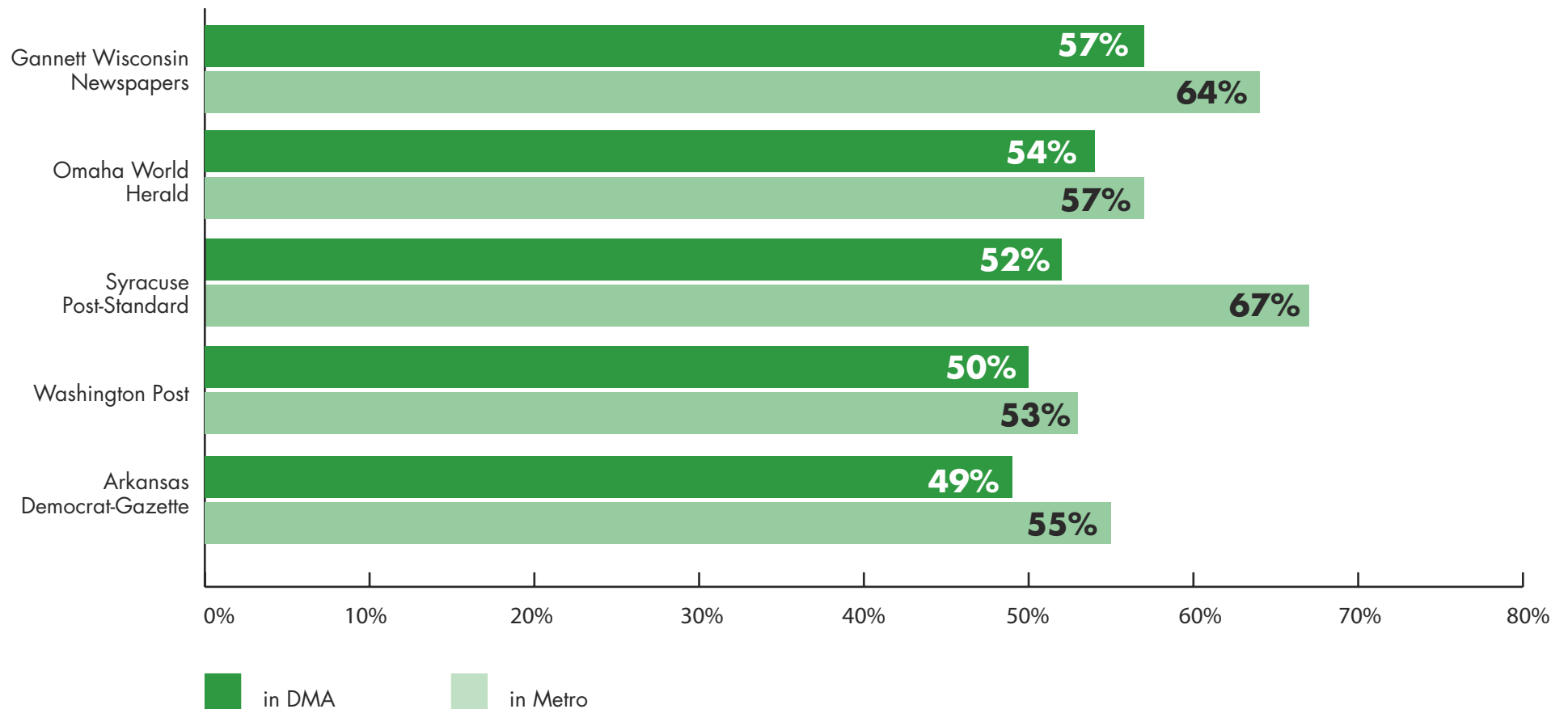
Advance Local publishes 25 newspapers and 10 news and information websites that reach **50+ million** unique visitors each month.

Source: Company websites, August 2018.

LOCAL NEWS REACH

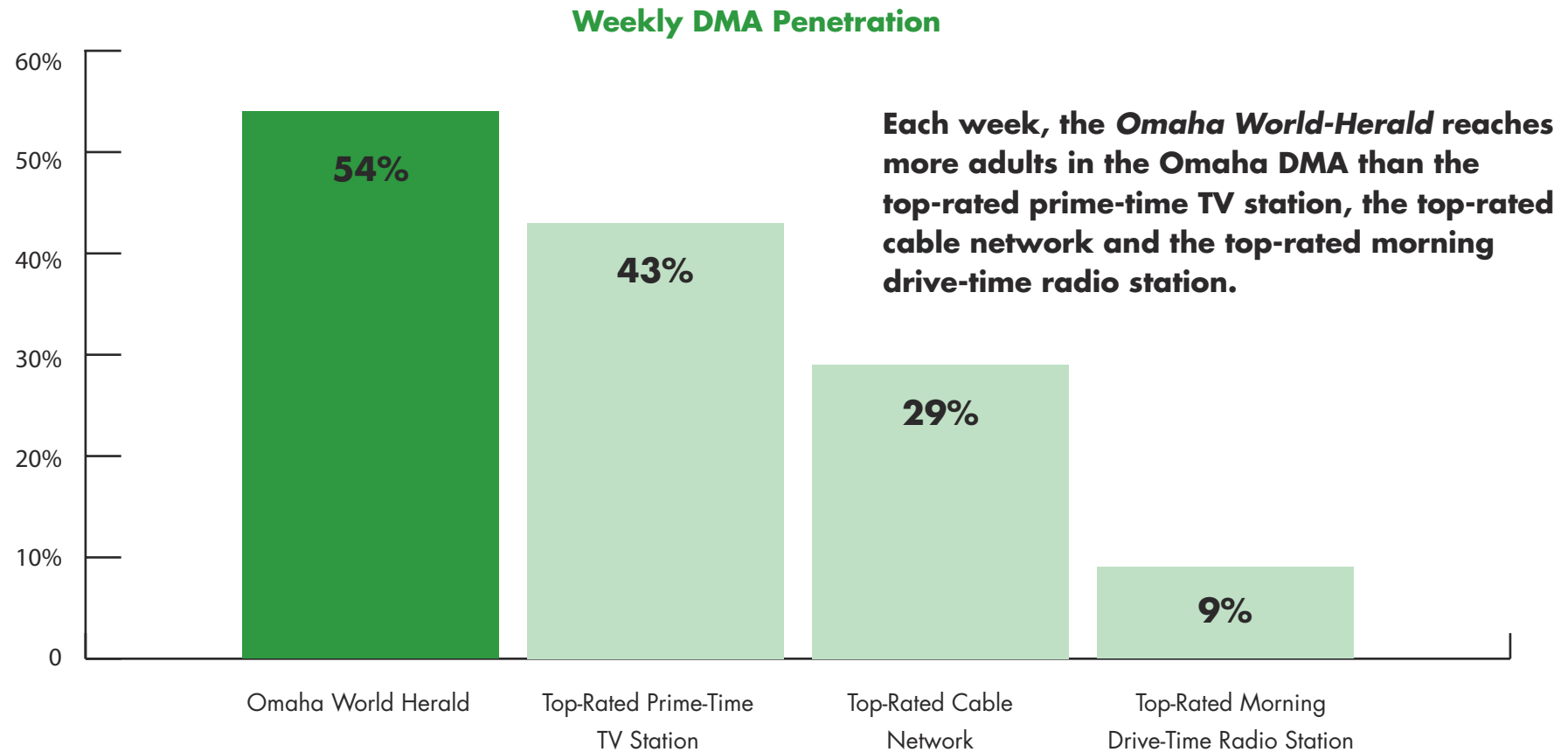
Most local news media organizations reach more adults within their markets than local broadcast television, cable television or radio broadcasts.

Weekly Coverage Penetration of Local News Media Organizations



Source: Nielsen Scarborough Newspaper Penetration Report, Release 2, 2017.

DMA (DESIGNATED MARKET AREA) PENETRATION



Source: Nielsen Scarborough Omaha Local Market Study, Release 1, 2017.

NEWS MEDIA CAN REACH YOUR TARGET AUDIENCE



News media companies provide a variety of ways to reach specific target audiences using geographic, demographic and/or behavioral criteria:

- Native advertising
- Email marketing
- Targeted digital display advertising
- Targeted social media advertising

- Print solutions (including in-paper advertising, inserts, direct mail and custom publishing)
- Search engine marketing (SEM) and search engine optimization (SEO)
- Database marketing
- Events and sponsorships

GLOSSARY

Coverage/Reach: the unduplicated number or percent of adults exposed to news media

Composition: the percent of the news media audience within each demographic or behavioral group

DMA: designated market area, as defined by Nielsen

Index: audience composition compared to market composition for each demographic or behavioral group. An index above 100 indicates that the news media audience is more likely to be part of a particular group or engage in a particular behavior

Integrated newspaper audience (INA): five-day weekday cumulative (print editions); average issue Saturday/Sunday (print editions); past seven days of website visitors (net)

Metro: core-based statistical area (CBSA), as defined by the Office of Management and Budget

News media: the collective group of print and/or digital news reporting organizations employing professional journalists and publishing original content

News media weekly audience: five-day weekday cumulative (print & digital editions); average issue Saturday/Sunday (print and digital editions); past seven days of website visitors (net)

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News Media Alliance
4401 N. Fairfax Drive
Suite 300
Arlington, VA 22203

For more information contact:
Rebecca Frank
Director, Research & Insights
571.366.1026
rebecca@newsmediaalliance.org

www.newsmediaalliance.org

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