The State of Minnesota Newspapers: 2014
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Survey Methodology

- 1005 adults surveyed by telephone from November 8 to December 11, 2013
  - 800 Random-Digit-Dial Interviews
  - 150 Cell Phone Interviews
  - 50 “oversample” interviews with residents age 18-34.
- 12-minute English-language interviews
- Survey area includes the entire state of Minnesota.
- Sample balanced by geography, gender, age, education, and household size.
- Sample projected to 2013 estimate of Minnesota adult population of 4,143,200.
- Survey accuracy is +/- 3% for full sample.
Major Objectives

- Review newspaper reading habits across the state of Minnesota. This includes:
  - Readership of daily, Sunday, and community newspapers.
  - Readership and usage of digital newspaper extensions such as newspaper websites, and smart phone “apps.”
  - Demographic characteristics of those reading on various newspaper platforms.

- Describe common retail shopping preferences, purchase of major goods and services, as well as the preferred source of gaining information to guide shopping and purchase decisions. A review of travel and tourism is also provided.

- Document Minnesota opinion about public or legal notices: the importance of public notices, where residents look for public notices, and how often they read them.
Print and Digital Reach
Daily, Sunday, and Community Newspapers Have Impressive Readership Across the State.

- Daily Newspaper Reach:
  - Daily newspaper 1-issue reach: 33%
  - Daily newspaper Cume (D5): 49%

- Sunday Newspaper Reach:
  - Sunday newspaper 1-issue reach: 49%
  - Sunday newspaper 4-issue cume: 59%

- Community Newspaper Reach:
  - Community newspaper 1-issue reach: 51%
  - Community newspaper monthly cume: 63%
The Weekday Newspaper “Heartbeat”: Weekday newspapers are especially strong among those 65+ and those with household incomes exceeding $100K.
Comparison of Weekday and Sunday Newspapers: Sunday newspaper strength expands into those aged 35-49.
Comparison of Sunday and Community Newspapers: Community newspapers mirror the strength of Sunday newspapers.
Digital Access to Minnesota Newspapers

Digital Access
- Residents with Web Access: 72%
- Residents with Mobile Access: 56%
- Residents with SmartPhones: 50%

Newspaper Digital Usage
- Residents access NP Website (D7): 25%
- Residents Using NP "APP" (D7): 7%
Relationship of Newspaper Distribution Vehicles: Digital vehicles extend average issue print reach by 7%.

- Exclusive Print Reach: 2,956,100 (51%)
- Both: 851,200 (21%)
- Exclusive Digital Reach: 276,100 (7%)
Demographic Characteristics Contrasted for Print, Web, and “App” Users: Web especially popular among 35-49’s, Apps among 18-34’s
Building Blocks of the Newspaper Brand

Newspaper Market Coverage

- Total Newspaper Access over 30 Days: 89%
- Total Newspaper Access (D1,S1,C1,D7): 78%
- Digital Newspaper Net (W7): 27%
- Newspaper "APP" Access (W7): 7%
- Newspaper Web Access (W7): 25%
- Print Readership Net: 71%
- Community NP Readership: 51%
- Sunday Readership: 49%
- Weekday Readership: 33%

Scarborough
Newspapers and Advertising
How important is newspaper advertising?

- Very Important: 22%
- Important: 47%
- Not Important: 19%
- Not Important at All: 11%

Well over two-thirds of Minnesotans, even some non-readers, feel newspaper advertising is important!
Coupons Are Important and Minnesotans Expect to Find Them in the Newspaper.

How likely to use coupons

- Very Likely: 37%
- Likely: 37%
- Not Likely: 13%
- Very Unlikely: 12%

Among coupon users:
Where are you most likely to get coupons?

- Newspaper: 55%
- Mail: 24%
- Groupon/Living Social: 9%
- Smartphone Coupons: 8%
- Manufacturer Websites: 4%
Which medium is most useful when searching for a good deal?

- Newspaper and Newspaper Websites: 39%
- Groupon/Living Social: 22%
- Mail Coupons: 19%
- Television: 13%
- Radio: 2%
No Matter What Consumers Purchase, Newspapers Have About 90% of Shoppers Covered.

<table>
<thead>
<tr>
<th>Consumer Purchase</th>
<th>Percent Buying in Past Year</th>
<th>Percent Reached by Minnesota Newspapers</th>
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<tbody>
<tr>
<td>Home Improvement Merch. (&gt;$100)</td>
<td>59%</td>
<td>92%</td>
</tr>
<tr>
<td>Lawn and Garden Equipment</td>
<td>56%</td>
<td>93%</td>
</tr>
<tr>
<td>Lottery Tickets</td>
<td>48%</td>
<td>94%</td>
</tr>
<tr>
<td>New or Used Vehicle</td>
<td>32%</td>
<td>93%</td>
</tr>
<tr>
<td>Furniture (&gt;$100)</td>
<td>31%</td>
<td>92%</td>
</tr>
<tr>
<td>Remodeling Project</td>
<td>31%</td>
<td>86%</td>
</tr>
<tr>
<td>Buy/Sell Real Estate</td>
<td>7%</td>
<td>90%</td>
</tr>
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</table>
Advertising Circulars Are a Critical Part of Newspaper Content

Preferred Source of Advertising Circulars

- Newspaper: 45%
- Free Shopper: 22%
- Mail: 22%
- No Preference: 12%

How Often Read Through Circulars Included in Sunday Newspapers

- Every time/Very Often: 46%
- Once in a While: 24%
- Almost Never: 12%
Newspapers and the Traveling Public
Three-fourths of Minnesotans have taken an overnight trip in the past year--90% of travelers have read or used a newspaper.

Number of overnight trips taken by Minnesotans:
- None: 26%
- 1-2: 29%
- 3-4: 18%
- 5-10: 16%
- 10+: 9%

Overnight Trips to Surrounding States:
- Minnesota: 76%
- Iowa: 22%
- Wisconsin: 34%
- South Dakota: 16%
Top Travel States

- Minnesota: 76%
- Wisconsin: 34%
- Iowa: 22%
- South Dakota: 16%
- California: 15%
- Florida: 13%
- Nebraska: 13%
- Illinois: 12%
Transportation Used by Travelers

- Car: 89%
- Airplane: 39%
- Bus: 8%
- Train: 6%

1,182,200 Minnesota adults took at least one airplane flight.
Over 1,403,300 Minnesotans have visited a casino in the past 12 months and Minnesota newspapers have reached 1,341,200 of them.
Newspapers Have Professional Sports Attenders Covered!

Visit a Professional Sporting Event such as Vikings, Twins, Timberwolves, Wild and Lynx

Yes 28%

No 72%

Ability of Minnesota Newspapers to Reach Sports Attenders

No 8%

Yes 92%

Over 1,149,400 Minnesotans have attended a professional sporting event in the past 12 months & Minnesota newspapers have reached 1,060,660 of them.
Newspapers and Knowledge of One’s Community
Most Useful Information for:

<table>
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<tr>
<th>Source</th>
<th>Community Schools</th>
<th>High School Sports</th>
<th>Things to Do</th>
<th>Crime</th>
<th>Voting Decisions</th>
<th>Local Gov’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers/NP websites</td>
<td>56%</td>
<td>58%</td>
<td>52%</td>
<td>50%</td>
<td>35%</td>
<td>49%</td>
</tr>
<tr>
<td>Internet</td>
<td>17%</td>
<td>9%</td>
<td>17%</td>
<td>8%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Television</td>
<td>9%</td>
<td>11%</td>
<td>5%</td>
<td>23%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Radio</td>
<td>7%</td>
<td>9%</td>
<td>12%</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Social Media</td>
<td>3%</td>
<td>4%</td>
<td>8%</td>
<td>8%</td>
<td>3%</td>
<td>2%</td>
</tr>
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Politics and Voting: Newspapers are key source of voting information.

How Often Vote?

- Nearly Every Time: 61%
- Most of the Time: 16%
- Sometimes: 8%
- Rarely: 6%
- Never: 7%

Most Important Source for Vote Decisions

- Newspapers or Newspaper Websites: 39%
- Television: 26%
- Personal Visits: 12%
- Mail: 10%
- Telephone Calls: 4%
Newspapers and Public Notices
Public notices are fundamental for governance and most citizens prefer public notices in the local newspaper or its website.

Do you believe keeping citizens informed by publishing public notices in the newspaper is an important requirement?

- Yes: 78%
- No: 15%
- Don't Know: 7%

Suppose you could get public notices anywhere. Which way would you prefer?

- Newspaper or its website: 39%
- Mail: 23%
- Social Media: 8%
- Television: 6%
- Government Website: 6%
- Radio: 4%
If public notices were placed on government websites or in newspapers, how often do you think you would refer to them?

- **Never**: 48%
- **Rarely**: 35%
- **Sometimes**: 22%
- **Usually**: 14%

**Newspaper**
- **Never**: 28%
- **Rarely**: 35%
- **Sometimes**: 11%
- **Usually**: 6%

**Gov’t Website**
- **Never**: 48%
- **Rarely**: 34%
- **Sometimes**: 11%
- **Usually**: 6%
Newspapers play a vital role in communities across the state. Fully 89% of residents have accessed newspapers or their websites during a typical month—most of them in a typical week (78%).

Digital newspaper access is especially popular among younger residents. For maximum benefit, advertisers should use a combination of newspaper print and digital vehicles.

Daily newspapers should develop frequency discounts that provide substantial discounts for second or third weekday advertisements.

Advertising information is among the most valued “content” in newspapers—newspaper advertising is eagerly sought by readers.

- Newspapers are twice as important as any other source when looking for a “good deal.”
- Newspaper inserts are well read and people overwhelmingly prefer to get them in their newspaper.
Newspapers reach an advertiser’s primary targets whether they are car purchasers, home buyers, professional sports attendees, casino visitors, or furniture/home improvement merchandise buyers. Newspapers remain the fundamental core of any marketing strategy.

Newspapers remain a vital information source about community schools, high school sports, entertainment, crime, and local government affairs including vote decisions.

Citizens insist that governing bodies keep citizens informed with public notices. Newspapers are the overwhelming preferred source of public notices and few would go to government websites to access public notices.
Questions? Contact:

Ron Mulder
Vice President, Analytics and Insights
Scarborough.
rmulder@scarborough.com
612-803-1434