

**SITE MATTERS:
THE VALUE OF LOCAL NEWSPAPER WEB SITES**



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1. Introduction

Research findings published in two reports by the Newspaper Association of America in 2009 demonstrated the value of the printed newspaper, in terms of consumers' shopping and purchase patterns (*How America Shops and Spends*) and their related media usage (*How America Uses Advertising*). This report reviews the findings of a survey that probed the value of local newspaper Web sites in the consumer marketplace. It also builds on a previous Online Publishers Association study that showed the value of quality content Web sites over portals in overall ad effectiveness.

This survey, fielded in November 2009, measured consumer attitudes and behaviors regarding local newspaper Web sites and content compared with other online sources of local news and information.

This report address questions such as:

- What are the types of Web sites consumers use to obtain local information?
- What is consumers' primary online source for local information?
- What is the level of interest among consumers for various types of local content?
- What type of Web site do consumers use most often for various types of local content?
- What type of Web site do consumers consider most trustworthy or reliable? Most informative? Most credible? Most comprehensive?
- Does consumer opinion of online advertising vary depending on the type of Web site?
- How do consumers consider the trustworthiness of the advertising they view on different types of Web sites for various segments of local content?

2. Methodology & Definitions

The Newspaper Association of America contracted with comScore, Inc., Reston, Virginia, to conduct the research described in this report. The survey was conducted in November 2009, and is based on a nationally representative sample of adults who use Web sites within the comScore panel. Participants received an e-mail invitation to take the online survey, which took approximately 10 minutes to complete. There were 3,055 completed interviews. Data were weighted on age, gender, income, and region to match national online targets prior to analysis.

For survey purposes, local content in the questionnaire was defined as follows: “General information and news, entertainment, sports, classifieds, etc. that is relevant specifically to the city/region where you live.”

Sources for local content were defined in the questionnaire as:

- Local newspaper Web site (the Web site from the newspaper in your area)
- A local radio Web site (the Web site from a local radio station)
- A local TV station Web site (such as your local ABC or CBS affiliate’s station site)
- An online portal (such as AOL or Yahoo)
- A specialty Web site (such as ESPN.com or Eonline.com, Craigslist, or CNN.com)
- A social networking site (such as Facebook or LinkedIn)
- Some other type of Web site

Based on these definitions, all of the content categories can be interpreted to include multiple Web sites. For example, all respondents would be able to access more than one TV and radio site within their specific local market. The one exception to this is that in most cases, each local market typically would only have one local newspaper site.

3. Key Findings

- **High Value.** Local newspaper Web sites are of very high value to consumers in terms of online local content. The key findings include the following:
 - Local newspaper Web sites are the category most used for online local content.
 - Local newspaper Web sites rank first among all sources for trustworthiness, credibility, and being the most informative place to find local content of all types – including news, information, entertainment, sports, and classifieds content.
 - Ratings vary somewhat for certain demographic groups, but the overall rankings are consistently in favor of local newspaper sites.

- **Trusted Source for Advertising.** Consumers also consider local newspaper Web sites to be the most trusted source of online advertising, because the advertising on these sites is perceived to be more current, credible, and relevant to them.

- **One site versus many.** Local newspaper sites compete most closely with local TV station sites, but many local markets typically have only one local newspaper Web site. The abundance of television sites compared with newspaper sites in a given market underscores the value of the one local newspaper site to advertisers. The abundance of types of Web sites in a typical market is even more so for local radio and there are a plethora of specialty Web sites and social networking options for consumers.

4. Interest, Sources & Attitudes

Interest level in a range of local content areas varied. Nearly two-thirds (65%) reported being very interested in local news, while 57% were noted as being very interested in local information. Less than half were recorded as very interested in local entertainment (40%), while just over one-third ranked local classifieds (34%) and local sports (34%) high on the interest scale.

By contrast, few are uninterested in local news and local information (5% for each). Fewer than one-in-five (16%) are not interested in local entertainment, while about one-in-four (24%) are not interested in local classifieds. About one-third (34%) were not interested in local sports, with the remainder split evenly between moderately and very interested.

Question: Please indicate your level of interest in consuming local content on a regular basis related to each of the following topics. Use the following scale where “1” means “Not at All Interested” and “7” means “Extremely interested”.

Level of Interest in Local Content

	Very Interested	Moderately Interested	Not at all Interested
Local News	65%	30%	5%
Local Information	57%	38%	5%
Local Entertainment	40%	44%	16%
Local Classifieds	34%	42%	24%
Local Sports	34%	34%	33%

Base = Total Adults

When asked a generalized, overall question about a type of online source used most for local information in the collective sense (see question below), nearly one-third (31%) select online portals. The percentages were remarkably consistent across age, income, and education demographics. Keeping in mind that these online portals contain search components, it is perhaps unsurprising they rank high – and they also can result in displaying content from other local media Web sites, including newspapers.

Local newspaper and local television Web sites ranked second and third, respectively. Both types of sites were used more amongst age groups above 35, while income and education revealed smaller differences. Again, consider that many local markets typically have only one local newspaper Web site, but many local television Web sites.

Question: This survey is about your use of the Internet to get regular local information – that is, general information and news, entertainment, sports, classifieds, etc. that is relevant specifically to the city/region where you live. Overall, which of the following types of Web site is the one source you rely on most for regular local information? Which other types of Web sites do you use to find regular local information?

Source Relied on Most for Local Information

	Total	Age			Income		Education	
		18-34	35-54	55+	Under \$75K	\$75K+	No College	College
	N = 3,055	1,231	1,332	492	1,784	1,075	739	2,298
Local Newspaper	23%	18%	25%	28%	22%	24%	20%	24%
Online Portal	31%	30%	33%	30%	30%	32%	31%	31%
Local TV	22%	19%	23%	26%	24%	20%	25%	21%
Specialty website	9%	12%	7%	6%	8%	11%	8%	9%
Social Networking	8%	14%	5%	3%	9%	6%	10%	8%
Radio	3%	3%	3%	2%	3%	3%	3%	3%
Other type of website	4%	5%	4%	5%	5%	4%	4%	5%

Base = Total Adults

Respondents were also asked to select other online sources for local information beyond the one they reported using most. When combined with the primary source to form a more complete indicator, the data show that local newspaper Web sites ranked highest (57%), ahead of online portals (54%) and local television Web sites (53%).

Local newspaper Web sites recorded high incidence levels for upper-income households (63%), for the college educated (60%), and for those age 35 or older (58%).

Complete Sources of Local Information

	Total	Age			Income		Education	
		18-34	35-54	55+	Under \$75K	\$75K+	No College	College
	N = 3,055	1,231	1,332	492	1,784	1,075	739	2,298
Local Newspaper	57%	55%	59%	59%	54%	63%	49%	60%
Online Portal	54%	57%	54%	49%	52%	58%	52%	55%
Local TV	53%	48%	56%	55%	52%	56%	52%	53%
Specialty website	30%	36%	27%	22%	26%	37%	21%	32%
Social Networking	25%	37%	19%	11%	23%	28%	25%	25%
Radio	20%	23%	20%	14%	17%	26%	17%	21%
Other type of website	15%	17%	13%	14%	15%	15%	13%	15%

Base = Total Adults

The strength of local newspaper Web sites was revealed when respondents were asked to identify Web sites used most often for specific types of local content. Newspaper sites ranked first as a source for local information (29%), local sports (27%) local entertainment (26%) and local classifieds (39%), ahead of both local television Web sites and online portals. Local newspaper Web sites and local television Web sites were cited by nearly identical percentages (30% and 31%, respectively) as sources relied on most often for local news.

Question: Overall, which one Web site source do you rely on most often for each of the following topics. Select one source for each column below.

Sources Used Most Often by Content Type

	Local News	Local Information	Local Sports	Local Entertainment	Local Classifieds
Local newspaper	30%	29%	27%	26%	39%
Local TV station	31%	21%	21%	16%	10%
Online portal	14%	17%	12%	15%	13%
Local radio	7%	10%	10%	11%	5%
Specialty website	7%	9%	10%	11%	14%
Social networking	4%	7%	5%	11%	6%
Other website	5%	8%	14%	10%	13%

Base = Total Adults

Local newspaper Web sites rated better overall than other local competitors in terms of being trustworthy or reliable. While virtually tied with local television Web sites as the one source considered most trustworthy or reliable for local news (33% vs. 32%, respectively), newspaper sites had a larger lead in all the other content areas. Local newspaper Web sites led television by twelve percentage points (34% vs. 22%) for local information, by six points for local sports (30% vs. 24%), by 10 points for local entertainment (30% vs. 20%) and by 29 points for local classifieds (42% vs. 13%).

Question: Please indicate which one Web site source you consider to be most trustworthy/reliable for each of the following topics. Select one source for each column below.

Most Trustworthy Source by Content Type

	Local News	Local Information	Local Sports	Local Entertainment	Local Classifieds
Local newspaper	33%	34%	30%	30%	42%
Local TV station	32%	22%	24%	20%	13%
Online portal	11%	13%	11%	13%	11%
Local radio	8%	8%	9%	10%	4%
Specialty website	6%	9%	11%	10%	13%
Social networking	4%	6%	4%	8%	6%
Other website	5%	7%	10%	8%	11%

Base = Total Adults

The quality of being more informative is also a distinctive characteristic of local newspaper Web sites for consumers. They rank first in all five content types, edging out local television Web sites for local news (34% vs. 32%), with wider margins for local information (32% vs. 23%), local sports (30% vs. 24%) local entertainment (29% vs. 18%) and local classifieds (43% vs. 12%).

Question: Please indicate which one Web site source you consider to be most informative for each of the following topics. Select one source for each column below.

Most Informative Source by Content Type

	Local News	Local Information	Local Sports	Local Entertainment	Local Classifieds
Local newspaper	34%	32%	30%	29%	43%
Local TV station	32%	23%	24%	18%	12%
Online portal	12%	14%	11%	14%	13%
Local radio	7%	8%	12%	11%	13%
Specialty website	6%	9%	9%	10%	5%
Social networking	5%	6%	4%	9%	4%
Other website	5%	7%	10%	8%	10%

Base = Total Adults

Credibility is another key distinction for local newspaper Web sites. Again, they best second-ranked local television Web sites for all content types, from local news (35% vs. 32%), local information (34% vs. 23%), local sports (30% vs.24%), local entertainment (30% vs. 19%) and local classifieds (43% vs. 13%).

Question: Please indicate which one Web site source you consider to be most credible/believable for each of the following topics. Select one source for each column below.

Most Credible Source by Content Type

	Local News	Local Information	Local Sports	Local Entertainment	Local Classifieds
Local newspaper	35%	34%	30%	30%	43%
Local TV station	32%	23%	24%	19%	13%
Online portal	11%	13%	11%	13%	10%
Local radio	6%	9%	12%	11%	12%
Specialty website	6%	8%	8%	10%	6%
Social networking	4%	6%	5%	8%	6%
Other website	5%	7%	10%	8%	9%

Base = Total Adults

Four-in-ten adults (40%) agreed that their opinion of the advertising they see online is influenced by the type of Web site upon which the ad appears. Younger adults (18 – 34) are more likely than those 55 and older to agree that the type of Web site matters for advertising (46% vs. 31%). Those in higher income households are slightly more likely to agree than those with lower household incomes (42% vs. 38%). However, education level does not appear to make a difference.

Question: When you see advertising on Web sites, is your opinion of the advertising influenced by the type of Web site you are on when you see the ad?

Advertising Influence by Type of Web site

	Total	Age			Income		Education	
		18-34	35-54	55+	Under \$75K	\$75K+	No College	College
Opinion of Advertising Influenced by Website	40%	46%	36%	31%	38%	42%	39%	40%

Base = Total Adults

Age makes a difference: nearly half (48%) of those who say the type of Web site is an influence is composed of adults ages 18 – 34, contrasted with just over one-third (36%) of the same age group who say the type of Web site is not an influence.

Age Composition: Type of Web site Influences Advertising

	Yes	No
N = 3,055	1,206	1,849
<u>Age</u>		
18 - 34	48%	36%
35 - 54	40%	46%
55 & older	13%	18%
Total	100%	100%

Among those who agree that their opinion of advertising is influenced by the type of Web site, local newspaper sites are rank first in terms of the trustworthiness of the advertising. More than one-third (36%) selected local newspaper Web sites for trustworthy advertising compared to less than one-fourth (23%) for local television Web sites and less than one-in-eight (12%) for online portals. And local newspaper sites were the clear winner across all demographic categories – even among the younger 18 – 34 age group, leading the second-ranked television Web sites by 13 percentage points (35% vs. 22%), and online portals by 24 percentage points (35% vs. 11%).

Question: Please indicate which one Web site source where you consider the advertising you see to be the most trustworthy.

Type of Web site Influences Trustworthiness of Advertising

Opinion of Advertising Influenced by Website	Total	Age			Income		Education	
		18-34	35-54	55+	Under \$75K	\$75K+	No College	College
Local Newspaper	36%	35%	38%	38%	39%	34%	44%	34%
Local TV	23%	22%	24%	28%	26%	21%	23%	23%
Online Portal	12%	11%	14%	9%	13%	10%	10%	12%
Specialty website	12%	13%	10%	9%	8%	17%	7%	13%
Radio	6%	9%	4%	2%	6%	7%	6%	6%
Social Networking	4%	5%	3%	2%	3%	4%	4%	3%

Base = Adults who say type of Web site influences advertising trustworthiness (40% of sample)

Advertising on local newspaper Web sites is considered more trustworthy because the ads are more current, with credibility and local relevance also important factors. All demographic groups rated “more likely to be current” as the top reason, nearly or exceeding eight-in-ten for each group.

Credibility was an especially important factor for those in upper-income households and the college-educated (57% for each). Advertising considered as “more local” ranked high for those age 55 and older (68%) and for the college-educated (55%).

Question: Please indicate any of the following reasons you consider the advertising on a local newspaper Web site to be the most trustworthy.

Reasons for Trustworthiness of Advertising on Local Newspaper Web sites

	Total	Age			Income		Education	
		18-34	35-54	55+	Under \$75K	\$75K+	No College	College
Ads more likely to be current	78%	78%	77%	82%	77%	80%	88%	74%
Ads more likely to be credible	48%	49%	47%	48%	44%	57%	26%	57%
Ads tend to be more local	46%	36%	51%	68%	43%	51%	25%	55%
Ads from more familiar sources due to print paper	30%	25%	30%	50%	28%	35%	20%	35%
Combination of advertising and other local content	23%	16%	29%	28%	18%	30%	15%	26%
Less junk advertising	21%	18%	24%	22%	20%	22%	16%	23%

Base = Adults who selected newspaper sites as influencing trustworthiness of advertising

5. Appendix

Demographic Profile of Respondents

Respondent Profiles		Total Sample
		N = 3,055
Age	18-34	40%
	35-54	43%
	55+	17%
Gender	Male	48%
	Female	52%
Household Income	Under \$75K	58%
	\$75K+	42%
Children in Household	Any children under 18	41%
Household Size	One	18%
	Two	32%
	Three or more	50%
Education	No College	25%
	Some College	29%
	College Grad +	46%
Employment Status	Employed	62%
	Retired	8%
	Other	30%