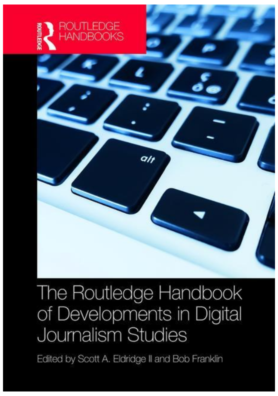

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WHAT IF THE FUTURE IS NOT ALL DIGITAL?

Trends in U.S. newspapers' multiplatform readership

Hsiang Iris Chyi and Ori Tenenboim

The web has been publicly available for more than 20 years, and U.S. newspapers' online experiment has been going on for nearly as long. Motivated initially by high hopes for the potential of the internet, newspaper firms have expended substantial resources digitizing and distributing their content through a number of channels. Underlying newspapers' sustained enthusiasm for a digital future is a long-time (but unchecked) assumption that print newspapers are dying (Picard and Brody, 1997; Penenberg, 2004; Chyi et al., 2012). The recent recession, which accelerated declines in print circulation and advertising revenue, reinforced such a belief. It is against this backdrop that U.S. newspapers, especially national and metro dailies, became more determined than ever to complete their transition from print to online. They slashed resources for the print edition, laid off print staff, and reduced printing and delivery schedules while expanding digital operations, hiring multimedia reporters and social media editors, and requiring journalists to reinvent themselves digitally. "Digital first" (Paton, 2010) has become a mantra, a goal, and a path leading to the future.

However, amid early excitement and recent determination about an all-digital future for news, a long-time problem facing a vast majority of newspaper firms persists – digital revenue remains insufficient to cover the loss on print revenue (*State of the News Media 2015*, 2015). Industry discourse often focuses on the loss on the print side without critically examining the performance of the digital products by framing the problem as "newspapers have not yet figured out how to monetize online news users," implying that a solution will emerge in the future (Chyi, 2013). However, to date, the performance of newspapers' digital products in terms of advertising and subscription revenue has remained underwhelming. The result of newspaper firms' transition from print to online is, in the business sense, "exchanging analog dollars for digital dimes" (quoted in Dick, 2009: para. 1).

Economic reasoning suggests that at least part of the difficulty in monetizing digital content lies in readership, which is the foundation for subscription and advertising revenue. Therefore, this chapter presents a comparative analysis of 51 U.S. newspapers' online and print readership data collected in 2007, 2011, and 2015 (Chyi and Tenenboim, 2017). The readership trends challenged conventional wisdom and triggered a debate over U.S. newspaper firms' technology-driven strategy. This chapter also addresses the implications of the debate.

Twenty years into their experiments with the web, it is time to scrutinize demand for newspapers' digital offerings, revisit newspaper firms' technology-driven strategy, and critically examine unchecked assumptions about the future of newspapers.

Growth of online news access

Online news use, like all things digital, has been growing. In 1995, roughly 2% of American adults reported getting news online three days a week or more. By 2010, about half (46%) did so. That was the year remembered as when "Web tops newspapers as news source for first time" (Olivarez-Giles, 2011), or "Online news readership overtakes newspapers" (Choney, 2011), and the *State of the News Media* announced that "[f]or the first time [. . .] more people said they got news from the web than newspapers" (Rosenstiel and Mitchell, 2011: para. 11). Such statements are often interpreted by newspaper managers as a sign of encouragement for their digital endeavors.

What is often neglected, however, is when users seek news online, many flock to online news aggregators such as Yahoo News, as opposed to newspaper sites. For example, the Pew Center reported that the most frequently visited news sites in 2006 were MSNBC (31%), Yahoo (23%), CNN.com (23%), Google (9%), AOL (8%), and FoxNews.com (8%) – none of which was affiliated with a newspaper. The most visited newspaper sites were NYTimes.com and USAToday.com, each mentioned by 5% of online news users (Pew Research Center for the People & the Press, 2006). In 2008, Yahoo became the leading news site and has remained the top online news destination at both national (Pew Research Center for the People & the Press, 2012; *State of the News Media 2015*, 2015) and local levels (Chyi and Lewis, 2009).

In recent years, social networking sites have become major sources for news. In 2016, 44% of U.S. adults got news from Facebook (Gottfried and Shearer, 2016). With its unprecedented power for content distribution, Facebook has been accused of "swallowing journalism" (Bell, 2016: para. 1). But the dominance of news aggregators and social media has not stopped U.S. newspapers from pursuing their digital dreams.

Transition from print to online

A major driver behind the industry-wide digital experiment is the 'newspapers are dying' assumption. Indeed, newspaper penetration has declined steadily at 1–2% each year since 1950 (Picard and Brody, 1997; Picard, 2008), and print circulation has been declining since 1987 (weekday) and 1993 (Sunday) despite a growing population (Newspaper Association of America, 2012). In 2008, the recession quickened declines in print circulation and advertising revenue, providing further support for the 'newspapers are dying' narrative. Driven primarily by fear and uncertainties, newspaper firms addressed their financial woes by slashing resources for their print editions and continued their incomplete transition online.

The number of full-time professional editorial employees declined from 55,000 in 2007 to 32,900 in 2015 (ASNE, 2016) – the reduction occurred mostly on the print side. Many newspapers, including the *New York Times*, reduced pages or dropped sections from the paper (Pérez-Peña, 2008); others, such as *Detroit Free Press*, the *Detroit News*, and the *Times-Picayune* (New Orleans), eliminated home delivery on certain days of the week. To reduce reliance on print advertising, many implemented significant price hikes on their print product (Case, 2009).

Despite dwindled resources, newspapers continued expanding their digital offering, managing a cross-media product portfolio that includes content for print, web, e-readers, smartphones, tablets, and social media platforms, and emphasizing multimedia content such as photos, audio, and video.

Digital revenue: advertising and subscription

Despite all the efforts to make 'digital' work, most newspapers have not been able to generate sufficient digital revenue to cover the loss on the print side. From 2007 to 2014, U.S. newspapers' print advertising revenue dropped from $42.2 billion to $16.4 billion, while digital ad revenue increased from $3.2 billion to $3.5 billion during the same period. Despite substantial declines, the dead-tree edition still generates about 80% of total ad revenue (*State of the News Media 2015*, 2015). The Newspaper Association of America (NAA) stopped releasing industry-wide revenue data after 2014, but the latest development is that three out of five publicly traded newspaper firms reported declines in their digital ad revenue in 2015 – 6% for The Tribune Publishing, 5% for Gannett, and 1% for A.H. Belo (Barthel, 2016).

Another revenue source is online subscription. After offering online news for free for over a decade, the industry implemented 'paywalls' in an attempt to boost online revenue. In March 2011, *The Dallas Morning News* started charging $16.95 a month for a digital package that includes web and apps, known as a "hard paywall" (Doctor, 2011). A few weeks later, the *New York Times* implemented a metered model, or a "soft paywall", requiring online users who view more than 20 articles (reduced to 10 in April 2012) per month to pay $15, $20, or $35 a month (Sulzberger, 2011). By 2016, 78% of U.S. newspapers with circulations over 50,000 have adopted the digital subscription model (Williams, 2016).

Despite the prevalence of digital paywalls among newspaper sites, most publishers do not reveal digital subscription revenue (Myllylahti, 2013). According to the NAA (2013), digital-only circulation revenue accounted for only 1% of total circulation revenue in 2012. Anecdotal information also suggests that the number of digital subscribers for non-national newspaper sites is underwhelming. For example, merely 65,000 digital-only subscribers signed up for Gannett's 81 local dailies as of June 2013 (Mutter, 2013). Some papers (e.g., *The Dallas Morning News* and *San Francisco Chronicle*) have dropped their paywalls.

In sum, despite the industry's focus on digital, U.S. newspapers' online offerings generate only limited advertising and subscription revenue. In contrast, their weakening print product remains the primary revenue driver. This raises questions about the size and composition of newspapers' online (and print) readership, because a healthy audience base should bring in healthy subscription and advertising revenue. To tackle the mystery behind 'analog dollars' and 'digital dimes', major newspapers' online and print reader base warrants scrutiny.

Audience measurement for newspapers

Audience measurement is of paramount importance because it carries profound, sometimes unappreciated, consequences for the industry and ultimately can provoke change to content itself (Webster, 2014). For newspapers, circulation is the most-watched indicator of demand for the print product, and circulation decline is often cited as evidence supporting 'the internet is killing newspapers' narrative. However, the Alliance for Audited Media (AAM), formerly the Audit Bureau of Circulations (ABC), has in recent years changed how circulation is measured, making year-to-year comparisons impossible (Mutter, 2010; *State of the News Media 2015*, 2015).

On the digital side, the newspaper industry often publicizes 'unique visitors' figures. Research firms (e.g., Nielsen/NetRatings and comScore Media Metrix) collect such data through tracking software installed on a national panel of internet users who chose to participate. Publishers also collect their own 'unique visitors' data through Google Analytics. Many factors influence the accuracy of such data, even when major research providers are involved (Gordon, 2007; Thurman, 2017). The number of unique visitors for newspaper sites often seems sizable because data are usually reported monthly (whereas print circulation is reported daily) (see Thurman et al., this volume, Chapter 13). In addition, this metric as an aggregate measure does not distinguish repeated users from one-time visitors (e.g., those coming from search engines or social networking sites). The 2015 State of the News Media report used such data to generate the list of the top 50 news sites and acknowledged that many of their unique visitors were flybys as opposed to regular visitors (*State of the News Media 2015*, 2015). Nevertheless, inflated audience size serves as a great sales pitch, which explains the popularity of this particular measure in industry discourse (Zheng et al., 2012).

Another indicator of newspaper demand is 'readership'. Print readership is the number of adults who have read or looked through a print newspaper during a specific time frame (e.g., one week or one month); online readership is the number of adults who have visited a newspaper site (Newspaper Association of America, 2015).

Scarborough Research (now Nielsen Scarborough), a long-time provider of media use and consumer information in the US, collects readership data (for print and online editions) through random-sample telephone interviews of adults age 18 or older[1] in a large number of designated market areas (DMAs).[2] Although such data are collected in the local market and thus do not include out-of-market readership, this metric allows for side-by-side comparisons between a newspaper's print and online demand in its home market. Therefore, through analyzing readership data, user demand for major U.S. newspapers' print and digital offerings can be assessed.

Demand for multiplatform newspapers

For multiplatform media firms, understanding user demand for different product offerings helps identify which product is the "cash cow" and which is the "problem child" (Picard, 2003, 2005). Through enumerating demand for individual newspapers' online and print products in a well-defined geographic market, a number of studies have identified consistent patterns characterizing consumer demand for online and print products under one newspaper brand (Chyi and Lasorsa, 1999, 2002; Chyi, 2006; Chyi and Huang, 2011; Hargrove et al., 2011). These patterns were theorized as:

$$\frac{\text{Online Edition Readers}}{\text{GP or WU}} < \frac{\text{Print Edition Readers}}{\text{GP or WU}} < \frac{\text{Hybrid Readers}}{\text{Online Edition Readers}} > 50\%$$

where *GP* = general public
where *WU* = web users
where hybrid readers are online edition readers who also read the print edition

These relationships suggest that, within the local market, (1) a local newspaper's print penetration is higher than its online penetration – that is, print readers outnumber online readers; (2) compared with the general public, readers of the online edition are more, not less, likely to read the same newspaper's print edition; and (3) the majority of a newspaper's online readers also read its print edition – that is, hybrid readers outnumber online-only readers.

Drawing on these research findings, this study (Chyi and Tenenboim, 2017) examines user demand for major U.S. newspapers' online and print editions. The first set of research questions addresses the size of print and online readership in the local market over time.

RQ1: Which product – print or online – reaches more readers in a newspaper's DMA market?
RQ2: To what extent has print readership changed over time?
RQ3: To what extent has online readership changed over time?

Within a local market, residents have access to the local newspaper in print and online formats. Among local readers, one may further distinguish (1) print-only readers, (2) online-only readers, and (3) hybrid readers, who access their local paper in both print and online formats. Print-only readers are traditionalists. Online-only readers represent an audience segment contributed uniquely by digital products, while hybrid readers are those who read the online edition but still hang on to the legacy product.

RQ4: What is the composition of the net combined readership – print-only, hybrid, and online-only? To what extent has the composition changed over time?

There used to be two schools of thought regarding how a newspaper's digital edition relates to its legacy product – cannibalization or complementation. Several studies (Chyi and Lasorsa, 1999, 2002; Chyi, 2006; Chyi and Huang, 2011; Hargrove et al., 2011) revealed that, compared with the general public, readers of the online edition were more, not less, likely to read the same newspaper's print edition. In addition, when the newspaper was the leading one in the market, it was found that the majority of readers of the online edition still hang on to its print counterpart – in other words, hybrid readers outnumbered online-only readers.

RQ5: Compared with the general public, are readers of the online edition more likely to read the same newspaper's print edition? Do hybrid readers outnumber online-only readers?

Finally, a major driver behind newspaper firms' digital transformation is pursuing young readers (Graybeal, 2011). Twenty years into the experiment, this study seeks to examine the effectiveness of U.S. newspapers' digital strategy in attracting young readers. Compared with print readership, to what extent is online readership younger? Which format – print or online – reaches more readers within each age group?

RQ6: What is the online and print reach among different age groups?

Empirical analysis

Sample: According to the 2015 *Editor & Publisher Newspaper Databook*, 1,331 daily newspapers currently operate in the United States (*Editor & Publisher*, *2015*; *Newspaper Databook*, 2015). To include major daily newspapers in the analysis, the researchers selected all newspapers with daily (M–F) circulations of more than 120,000. A total of 64 newspapers reached the threshold, of which 13 were excluded from the sample because their readership data were not completely available in the AAM-Nielsen Local audience summary database. The final sample consisted of 51 metro daily newspapers, with daily circulation ranging from 120,473 to 793,582.

Data sources: Print and online newspaper readership data collected in 2007 and 2011 by Scarborough were retrieved from the AAM's "Audience Snapshot+" tool.[3] These data were released on September 30 of the respective year, covering the six preceding months. The 2015 data were retrieved from the AAM Media Intelligence Center,[4] covering Q3 of 2015. Data retrieved were seven-day in-market (1) print readership, (2) online readership, and (3) net combined readership, as well as percentages of reach for each of the three.[5] The earliest data available in the databases were collected in 2007, and the latest were from 2015, with 2011 being the midpoint of the two. Seven-day print and online readership data among five different age groups (18–24, 25–34, 35–44, 45–54, and 55+) were retrieved from the AAM-Nielsen Local audience summary database (or "Audience Snapshot").[6] These data were released by Scarborough in 2015.

Data analysis: To address RQ1, comparative analysis was conducted using the 2015 online and print readership data across all 51 newspapers under study. To address RQ2 and RQ3, the analysis tracked readership data collected in 2007, 2011, and 2015 for print and online, respectively. To address

RQ4, print-only readership was calculated by subtracting online readership from combined readership. Online-only readership was calculated by subtracting print readership from combined readership. Hybrid (both print and online) readership was calculated by subtracting print-only readership from print readership. The analysis tracked the changes in composition using data collected in 2007, 2011, and 2015. To address RQ5, online readers' propensity of reading the print edition is calculated by dividing the number of hybrid readers by the number of total online edition readers (hybrid plus online-only). The general public's propensity of reading the print edition is simply print reach. To address RQ6, online and print readership data among five different age groups were compared.

Findings

RQ1 asked which product – print or online – reaches more readers in a newspaper's DMA market. Table 12.1 presents 2015 readership data of the 51 newspapers under study – in terms of percent

Table 12.1 In-market print and online reach, 2007–2015

State	*Newspaper*	*Print reach*			*Online reach*		
		2007	*2011*	*2015*	*2007*	*2011*	*2015*
Arizona	*The Arizona Republic*	52%	44%	33%	18%	17%	16%
Arkansas	*Arkansas Democrat-Gazette*	63%	54%	45%	6%	6%	6%
California	*Los Angeles Times*	34%	29%	24%	6%	8%	11%
California	*San Francisco Chronicle*	32%	24%	19%	10%	14%	13%
California	*San Jose Mercury News*	n/a	39%	32%	n/a	12%	11%
California	*The Orange County Register*	11%	9%	8%	2%	4%	3%
California	*The Press-Enterprise*	6%	5%	4%	1%	1%	1%
California	*The Sacramento Bee*	36%	30%	24%	8%	9%	8%
California	*U-T San Diego*	55%	44%	37%	17%	16%	11%
Colorado	*The Denver Post*	51%	n/a	31%	7%	n/a	10%
Connecticut	*The Hartford Courant*	41%	31%	28%	11%	8%	8%
Florida	*Orlando Sentinel*	45%	37%	28%	9%	10%	9%
Florida	*South Florida Sun-Sentinel*	29%	23%	19%	7%	8%	6%
Florida	*Tampa Bay Times*	34%	34%	30%	6%	6%	5%
Florida	*The Miami Herald*	39%	31%	26%	8%	9%	8%
Florida	*The News-Press*	40%	32%	27%	8%	7%	6%
Florida	*The Tampa Tribune*	30%	25%	20%	10%	11%	6%
Georgia	*Atlanta Journal-Constitution*	47%	35%	25%	18%	17%	15%
Hawaii	*Honolulu Star-Advertiser*	62%	53%	50%	11%	16%	11%
Illinois	*Chicago Sun-Times*	n/a	42%	23%	n/a	7%	6%
Illinois	*Chicago Tribune*	46%	34%	33%	10%	10%	12%
Indiana	*The Indianapolis Star*	49%	40%	33%	13%	12%	11%
Kentucky	*The Courier-Journal*	64%	56%	46%	10%	12%	9%
Massachusetts	*The Boston Globe*	40%	29%	25%	16%	20%	16%
Michigan	*Detroit Free Press*	49%	40%	36%	10%	12%	14%
Minnesota	*St. Paul Pioneer Press*	28%	24%	20%	6%	5%	5%
Minnesota	*Star Tribune*	53%	45%	42%	12%	13%	13%
Missouri	*St. Louis Post-Dispatch*	57%	43%	38%	13%	14%	14%
Missouri	*The Kansas City Star*	60%	51%	39%	13%	12%	11%
Nevada	*Las Vegas Review-Journal*	n/a	45%	36%	n/a	11%	11%
New Jersey	*The Star-Ledger*	12%	10%	7%	3%	5%	6%
New York	*New York Daily News*	29%	26%	20%	3%	3%	5%

State	Newspaper	Print reach			Online reach		
		2007	2011	2015	2007	2011	2015
New York	*Newsday*	15%	13%	10%	3%	4%	4%
North Carolina	*The Charlotte Observer*	46%	39%	29%	10%	12%	10%
North Carolina	*The News & Observer*	37%	32%	24%	10%	8%	8%
Ohio	*The Columbus Dispatch*	60%	52%	38%	9%	12%	10%
Ohio	*The Plain Dealer*	47%	40%	31%	8%	13%	11%
Oregon	*The Oregonian*	54%	47%	32%	10%	13%	18%
Pennsylvania	*Pittsburgh Post-Gazette*	n/a	40%	28%	n/a	8%	9%
Pennsylvania	*The Philadelphia Inquirer*	36%	27%	22%	5%	7%	7%
Pennsylvania	*Tribune-Review*	29%	31%	32%	5%	6%	8%
Texas	*Austin American-Statesman*	59%	45%	40%	21%	18%	16%
Texas	*Fort Worth Star-Telegram*	23%	18%	15%	4%	6%	7%
Texas	*Houston Chronicle*	52%	43%	32%	10%	14%	10%
Texas	*San Antonio Express-News*	63%	47%	40%	16%	15%	14%
Texas	*The Dallas Morning News*	41%	31%	25%	8%	9%	8%
Utah	*Deseret News*	20%	n/a	16%	7%	n/a	11%
Virginia	*The Virginian-Pilot*	53%	44%	37%	15%	15%	14%
Washington	*The Seattle Times*	44%	34%	31%	14%	16%	13%
Washington DC	*The Washington Post*	61%	54%	41%	21%	21%	21%
Wisconsin	*Milwaukee Journal Sentinel*	65%	56%	42%	15%	16%	15%
Average		**42.4%**	**35.9%**	**28.8%**	**9.8%**	**10.7%**	**10.0%**

reach. In each and every one of the 51 cases, print readership outnumbers online readership by a wide margin. On average, the print edition reaches 28.8% of local adults; the online edition reaches 10%; and the print edition is the most read product in all these major newspapers' home markets.

RQ2 asked to what extent print readership has changed over time. Table 12.1 presents the percent reach of the print edition for each newspaper in 2007, 2011, and 2015. Print readership declined through the years, which is in line with the well-reported circulation trends. The average reach dropped from 42.4% in 2007, to 35.9% in 2011, to 28.8% in 2015. The decline amounts to 13.6 percentage points over eight years.

RQ3 asked to what extent online readership has changed over time. Table 12.1 presents the percent reach of the online edition for each newspaper in 2007, 2011, and 2015. Surprisingly, online readership has shown little to no growth during the period. The average reach increased slightly from 9.8% in 2007 to 10.7% in 2011 and then decreased slightly to 10.0% in 2015.

Regarding more recent changes in online readership (2011–2015), as many as 32 newspapers experienced a decrease (ranging from 0.1 to 5.6 percentage points); only 17 newspapers achieved an increase (0.1 to 4.4 percentage points).

RQ4 asked about the composition of the net combined readership – print-only, hybrid, and online-only. In 2015, the combined readership consisted of: 23.3% print-only, 5.5% hybrid (both print and online), and 4.5% online-only. Over time, print-only readership declined (from 35.4% in 2007 to 23.3% in 2015), and so did hybrid readership (from 7.1% to 5.5%). Online-only increased from 2.7% to 4.5%. Figure 12.1 illustrates the composition of combined readership in 2007, 2011, and 2015. Despite substantial declines, print-only remains the primary readership segment. Hybrid remains the secondary, and online-only remains a fraction of overall readership.

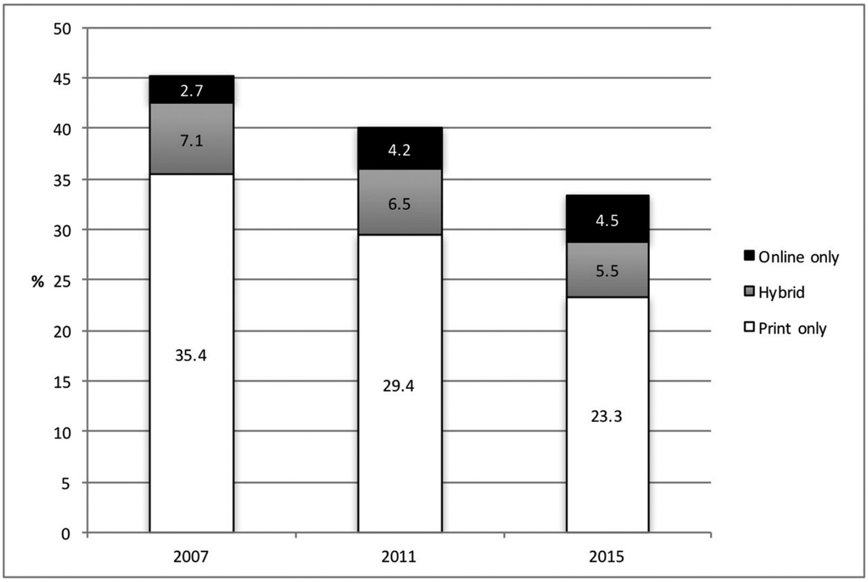


Figure 12.1 Composition of in-market combined readership, 2007–2015

RQ5 asked whether readers of the online edition, compared with the general public, are more likely to read the same newspaper's print edition. Results showed that, across all 51 newspapers, without an exception, online edition readers' propensity of reading the print edition is higher than the general public's propensity of reading the print edition by a wide margin (54.7% vs. 28.8% in 2015). In other words, online edition readers are nearly twice as likely to read the same paper's print edition as the general public.

RQ5 also asked whether hybrid readers outnumber online-only readers. Among 36 out of the 51 newspapers, this is true. Overall, more than 50% of online edition readers (54.7% in 2015) read the print edition; the rest are online-only readers.

RQ6 asked about print and online reach among different age groups. Table 12.2 presents the results. In all 51 cases, the oldest group (55+) is the most likely to read the print edition; for online, results are mixed. In 24 out of 51 cases, the highest online reach falls on 35–44-year-olds.

When the comparison is made between print and online, print reach surpassed online reach by a wide margin across all age groups. Figure 12.2 illustrates the gap. Among the youngest group (ages 18–24), an average of 19.9% read the print edition of the newspaper during the past seven days; only 7.8% accessed the paper digitally.

Reality and irrationality

These findings confirm that the examined newspapers are stuck between a shrinking market for print and an unsuccessful experiment online. From 2007 to 2015, print readership declined substantially, while their in-market online readership saw very little or no growth at all during the same period.

It is alarming that none of these major newspapers' websites – other than the *Washington Post* and the *Austin American-Statesman* – has ever reached 20% of its local population. This suggests

Table 12.2 In-market online and print reach by age, 2015

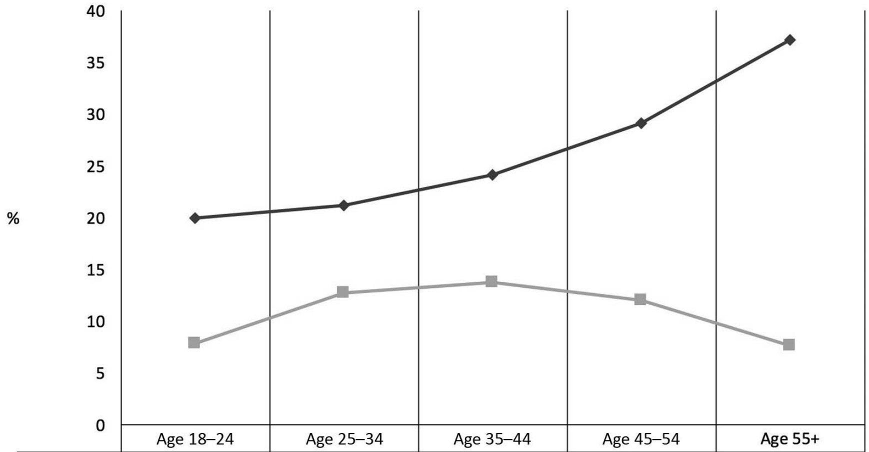
State	*Newspaper*	*Print reach*					*Online reach*				
		18–24	*25–34*	*35–44*	*45–54*	*55+*	*18–24*	*25–34*	*35–44*	*45–54*	*55+*
Arizona	*The Arizona Republic*	21.8%	18.3%	24.7%	37.2%	**45.2%**	9.2%	17.8%	**28.4%**	16.6%	11.9%
Arkansas	*Arkansas Democrat-Gazette*	26.9%	31.5%	52.0%	43.4%	**55.0%**	6.0%	6.3%	**9.0%**	3.5%	4.8%
California	*Los Angeles Times*	15.9%	22.2%	18.2%	23.5%	**31.5%**	12.2%	**14.7%**	12.7%	11.3%	6.1%
California	*San Francisco Chronicle*	9.6%	17.1%	12.6%	19.8%	**27.1%**	8.7%	14.7%	**17.1%**	15.6%	9.3%
California	*San Jose Mercury News*	23.9%	22.2%	25.7%	35.7%	**44.2%**	10.4%	**17.3%**	14.5%	10.9%	6.5%
California	*The Orange County Register*	6.4%	5.0%	5.7%	7.8%	**11.4%**	2.4%	**4.5%**	4.0%	3.0%	1.6%
California	*The Press-Enterprise*	1.7%	2.1%	3.5%	4.4%	**6.5%**	1.3%	1.0%	**2.0%**	**2.0%**	1.0%
California	*The Sacramento Bee*	12.9%	15.9%	18.1%	27.3%	**32.2%**	5.3%	**10.5%**	9.7%	10.3%	5.3%
California	*U-T San Diego*	35.3%	22.1%	25.0%	38.0%	**52.6%**	7.2%	**18.6%**	8.6%	12.7%	7.9%
Colorado	*The Denver Post*	24.3%	19.4%	24.8%	31.5%	**43.6%**	7.1%	**16.5%**	11.1%	9.8%	6.4%
Connecticut	*The Hartford Courant*	19.0%	22.9%	28.7%	28.8%	**32.9%**	2.1%	10.1%	11.0%	**12.4%**	5.7%
Florida	*Orlando Sentinel*	23.1%	29.0%	28.7%	28.6%	**29.4%**	10.5%	12.9%	**15.1%**	7.7%	5.1%
Florida	*South Florida Sun-Sentinel*	7.1%	13.8%	9.7%	16.8%	**21.6%**	10.1%	20.9%	16.5%	20.9%	**22.1%**
Florida	*Tampa Bay Times*	21.3%	31.7%	26.0%	30.4%	**33.2%**	6.4%	**7.0%**	6.0%	4.7%	3.4%
Florida	*The Miami Herald*	21.5%	17.7%	22.6%	27.1%	**32.9%**	8.3%	6.5%	7.8%	**11.1%**	6.4%
Florida	*The News-Press*	21.8%	19.7%	15.1%	23.2%	**33.1%**	1.4%	5.0%	8.9%	**10.7%**	4.1%
Florida	*The Tampa Tribune*	14.8%	18.0%	17.5%	19.8%	**21.5%**	4.7%	7.5%	**9.2%**	6.1%	4.0%
Georgia	*Atlanta Journal-Constitution*	11.3%	16.2%	23.6%	24.8%	**37.7%**	6.9%	19.8%	18.6%	**20.4%**	10.0%
Hawaii	*Honolulu Star-Advertiser*	33.9%	49.1%	45.0%	45.2%	**60.6%**	7.9%	10.0%	**12.4%**	11.9%	11.6%
Illinois	*Chicago Sun-Times*	14.7%	24.2%	23.0%	23.4%	**25.0%**	6.3%	7.1%	**8.8%**	6.9%	3.6%
Illinois	*Chicago Tribune*	22.6%	24.8%	27.1%	31.0%	**44.7%**	12.1%	**16.9%**	13.6%	11.9%	8.4%
Indiana	*The Indianapolis Star*	19.3%	22.1%	30.8%	31.6%	**46.0%**	6.8%	**17.6%**	16.3%	9.3%	7.0%
Kentucky	*The Courier-Journal*	33.7%	38.9%	35.4%	47.0%	**58.4%**	**11.5%**	10.1%	8.8%	7.7%	7.8%
Massachusetts	*The Boston Globe*	21.4%	18.7%	21.5%	23.9%	**31.5%**	14.2%	20.8%	**28.8%**	18.0%	8.6%
Michigan	*Detroit Free Press*	19.9%	20.5%	28.3%	33.5%	**41.8%**	9.1%	12.1%	**19.6%**	16.5%	7.8%
Minnesota	*St. Paul Pioneer Press*	12.3%	8.8%	20.7%	21.4%	**26.4%**	3.4%	3.2%	**10.0%**	9.0%	3.0%
Minnesota	*Star Tribune*	20.9%	33.0%	47.3%	**47.7%**	**47.7%**	6.9%	**20.6%**	15.1%	15.8%	9.2%
Missouri	*St. Louis Post-Dispatch*	32.9%	21.2%	34.8%	40.6%	**47.0%**	7.5%	15.2%	**20.0%**	18.5%	11.7%

(*Continued*)

Table 12.2 (Continued)

State	*Newspaper*	*Print reach*					*Online reach*				
		18–24	*25–34*	*35–44*	*45–54*	*55+*	*18–24*	*25–34*	*35–44*	*45–54*	*55+*
Missouri	*The Kansas City Star*	25.4%	26.1%	31.9%	40.4%	**52.2%**	2.8%	15.3%	15.4%	**15.7%**	8.1%
Nevada	*Las Vegas Review-Journal*	25.1%	24.0%	20.7%	38.0%	**54.3%**	8.5%	7.1%	**16.9%**	13.6%	8.4%
New Jersey	*The Star-Ledger*	6.8%	4.9%	4.9%	7.7%	**9.5%**	4.1%	**8.2%**	**8.2%**	6.8%	3.0%
New York	*New York Daily News*	15.2%	18.5%	17.6%	21.1%	**22.5%**	n/a	n/a	n/a	n/a	n/a
New York	*Newsday*	7.1%	7.6%	8.3%	11.5%	**13.4%**	2.7%	**4.9%**	4.5%	4.3%	2.2%
North Carolina	*The Charlotte Observer*	16.3%	21.8%	22.6%	30.8%	**39.3%**	4.8%	11.3%	**13.8%**	12.8%	7.2%
North Carolina	*The News & Observer*	8.6%	24.3%	25.1%	23.9%	**29.4%**	6.9%	**11.0%**	9.1%	8.6%	7.2%
Ohio	*The Columbus Dispatch*	28.9%	28.9%	30.4%	37.1%	**49.8%**	4.5%	9.9%	8.7%	**14.5%**	9.3%
Ohio	*The Plain Dealer*	18.1%	23.1%	31.8%	32.9%	**37.4%**	10.3%	11.9%	**17.0%**	11.6%	8.9%
Oregon	*The Oregonian*	28.6%	24.2%	31.3%	28.8%	**39.6%**	17.5%	25.4%	**25.6%**	17.3%	9.9%
Pennsylvania	*Pittsburgh Post-Gazette*	13.2%	14.9%	27.7%	30.5%	**35.5%**	6.5%	10.6%	**18.7%**	8.7%	7.0%
Pennsylvania	*The Philadelphia Inquirer*	20.1%	13.9%	19.1%	18.2%	**30.1%**	n/a	n/a	n/a	n/a	n/a
Pennsylvania	*Tribune-Review*	11.2%	13.8%	19.1%	19.4%	**24.6%**	**13.0%**	6.3%	10.4%	8.4%	5.1%
Texas	*Austin American-Statesman*	34.4%	27.8%	31.0%	42.7%	**56.0%**	8.2%	18.8%	**21.8%**	19.8%	13.0%
Texas	*Fort Worth Star-Telegram*	7.9%	8.8%	14.2%	14.8%	**20.8%**	6.9%	4.1%	**9.9%**	7.5%	6.8%
Texas	*Houston Chronicle*	22.4%	19.2%	22.4%	32.2%	**51.0%**	4.7%	10.4%	11.5%	**14.1%**	9.0%
Texas	*San Antonio Express-News*	23.4%	36.4%	24.8%	45.5%	**54.5%**	5.3%	**23.7%**	13.8%	18.6%	10.8%
Texas	*The Dallas Morning News*	21.4%	14.3%	17.7%	27.5%	**35.3%**	6.8%	8.7%	6.8%	9.9%	6.2%
Utah	*Deseret News*	17.1%	12.9%	10.8%	12.9%	**22.9%**	10.1%	12.6%	**14.7%**	10.3%	8.5%
Virginia	*The Virginian-Pilot*	26.8%	26.1%	30.9%	44.2%	**45.8%**	13.2%	**19.5%**	11.9%	17.3%	9.5%
Washington	*The Seattle Times*	29.2%	24.5%	22.6%	29.8%	**38.6%**	9.4%	17.0%	**18.8%**	15.4%	8.8%
Washington DC	*The Washington Post*	39.0%	26.3%	34.1%	40.2%	**54.3%**	22.6%	22.4%	**25.2%**	22.2%	15.1%
Wisconsin	*Milwaukee Journal Sentinel*	20.9%	31.9%	35.0%	42.7%	**58.2%**	9.1%	19.2%	**26.0%**	14.7%	11.4%
Average		19.9%	21.2%	24.1%	29.1%	**37.2%**	7.8%	12.7%	**13.7%**	12.0%	7.7%

Note: Bolded text indicates highest reach within the format



	Age 18–24	Age 25–34	Age 35–44	Age 45–54	Age 55+
Print	19.9	21.2	24.1	29.1	37.2
Online	7.8	12.7	13.7	12.0	7.7

Figure 12.2 In-market print and online reach by age, 2015

that not a single local U.S. newspaper has 'made it' digitally. The average online reach at 10% explains why they have failed to generate sufficient digital subscription or advertising revenue – because they have never reached sufficient online readers. In contrast, readers' attachment to the print edition has remained strong, with as many as 28.8% of the local population still reading (and paying $300 to $500 a year for) the 'dead-tree' edition.

In sum, after 20 years of trial and error, the performance gap between U.S. newspapers' online and digital products is deep and wide. However, despite the fact that the print edition remains the core product that outperforms the same newspaper's digital offerings by almost every standard, industry discourse has remained overwhelmingly 'pro-digital', often emphasizing digital gain (by focusing on growth as opposed to absolute volume) and ignoring the stronger-than-expected appeal of the print product.

In October 2016, journalist and media critic Jack Shafer at *Politico Magazine* introduced some of the findings presented in this chapter (originally published in *Journalism Practice*, Chyi and Tenenboim, 2017). His column (2016), titled "What If the Newspaper Industry Made a Colossal Mistake?", was shared extensively and triggered an intense debate about the future of newspapers. Many industry observers participated in the debate, and some digital enthusiasts responded to our findings strongly and emotionally. They put forward many 'pro-digital, anti-print' arguments. Some simply declared that there is no future for print newspapers – without providing any evidence. Others blamed Shafer and the researchers for triggering an unnecessary debate. Some rejected the idea that newspapers' technology-driven approach is a losing proposition, arguing that 'digital first' was never really tried in U.S. newsrooms. Others justified newspapers' digital failure by saying that digital media are still young – thus 'it is too early to tell'. Others believe digital news is simply better than print. Period.

Overall, these arguments reflect how deeply rooted the 'digital mentality' is and expose some of the irrationalities that may have shaped U.S. newspapers' digital strategy. But 20 years' empirical research indicates that newspaper readers are by no means "platform-agnostic" (Chyi, 2017). Users perceive online news as an inferior good, a less satisfying alternative to print newspapers (Chyi and Yang, 2009; Chyi, 2013).

Considering these readership trends; the oversupply of news, information, and entertainment on digital platforms; and Google, Facebook, and other tech giants' domination in the digital world, "it is hard not to conclude that there is no such thing as an all-digital future for the vast majority of U.S. newspapers" (Chyi, 2017: 21).

Regarding managerial implications, given dwindled resources, the development of digital products often comes at the expense of their print counterpart. That is why Chyi (2017) believes that "most US newspapers can no longer afford pursuing unrealistic digital dreams. They have no choice but to refocus on print, where their competitive advantage lies" (p. 21).

Looking into the future, newspaper firms must drop unrealistic expectations, acknowledge the reality, value audience research, offer quality, noteworthy content, and deliver it through preferred platforms. Albeit no longer "wildly profitable," there may still be a future for newspapers.

Limitations and future studies

This study analyzed readership data collected by Scarborough Research. Several limitations warrant discussion. First, our analysis included only larger local daily newspapers with circulation of 120,000 or above, not nationally circulated newspapers (*The Wall Street Journal*, *USA Today*, and *The New York Times*) or the large number of small community newspapers in the United States. One should take the characteristics of this sample into consideration when interpreting the results.

In addition, online readership data employed in this study do not include readers visiting a newspaper site from outside the newspaper's local market (or DMA), thus underestimating the total number of online readers. Research has shown that some newspapers, especially those circulated nationally, can reach a substantial number of overseas users (Thurman, 2014). Local newspapers may also attain long-distance users (Chyi, 2011). One study based on 28 U.S. local newspapers' online reader survey data reported that an average of 27.5% of those papers' online users resided outside the newspaper's designated market (NDM)[7] (Chyi and Sylvie, 2010). Since most local newspapers heavily rely on local advertisers (Runett, 2005; Newspaper Association of America, 2007), in-market online readers have been considered more valuable than long-distance readers (Chyi and Sylvie, 2010).

Another limitation is that the Scarborough approach may not fully consider audience exposure to newspaper content through social media, search engines, and news aggregators. For example, when users encounter a newspaper story on Facebook or Twitter, some follow the link to the newspaper site. Among them, not all would identify themselves as readers of the online edition in Scarborough's readership survey because they may not remember visiting a newspaper site – thus Scarborough may underestimate the number of visitors to newspaper sites. Nevertheless, Scarborough's data focus on self-identified readership, which is more important than flyby visits through incidental exposure in terms of time spent on the site (Mitchell et al., 2014) and business prospect.

Additionally, while this study compared newspapers' print and online readership, which is based on reach, it did not consider the level of engagement, such as time spent or frequency of use. Research shows that visits to newspaper sites do not last long (Thurman, 2014, 2017; *State of the News Media 2015*, 2015). Future studies may examine other dimensions of online engagement such as loyalty, depth, and stickiness (Zheng et al., 2012) to fully understand the performance of digital news products.

To conclude, no audience measures generate completely accurate results, but our longitudinal analysis compared readership trends over time using (arguably) the best data available to industry practitioners. As multiplatform readership gets increasingly complicated, the definition of readership may have to change accordingly. Nevertheless, it is important that newspaper firms constantly monitor reader composition and use that intelligence to guide (or correct) their product strategy so as to better serve readers on preferred platforms.

Further reading

This chapter is an extension to Iris Chyi's *Trial and Error: US Newspapers' Digital Struggles Toward Inferiority* (2013), which presents 20 years' research findings regarding online users' lukewarm responses to newspapers' digital offerings. The book also explains Chyi's "online news as an inferior good" theory (a.k.a. "Ramen Noodles Theory") in detail. Jack Shafer's column "What If the Newspaper Industry Made a Colossal Mistake?" passionately introduced the readership gap presented in this chapter to the industry. In a WAN-IFRA (World Association of Newspapers and News Publishers) report, Chyi (2017) addresses many "pro-digital, anti-print" arguments surfaced during the debate.

Notes

1 The interviews are conducted through random digit dialing (RDD) and include cell-phone-only (CPO) respondents in all local markets.
2 A DMA is a geographic area to which a county in the US is exclusively assigned on the basis of the television viewing habits of the people residing in the county, defined by A.C. Nielsen.
3 Formerly known as ABC's Audience-FAX* eTrends Tool. http://abcas3.auditedmedia.com/audience-fax/default.aspx
4 http://auditedmedia.com/data/media-intelligence-center/reports-and-tools/
5 Respondents are asked whether they have "read or looked into" any part of each of the weekday printed newspapers available in their local area in the past seven days. They are also asked whether they have visited the newspaper websites in the past seven days. The 2015 question prompted respondents to include access by laptop, tablet, smartphone, etc. 'Reach' is the percentage of adults ages 18+ in the market whom are reached by the newspaper.
6 http://abcas3.auditedmedia.com/scarborough/login.aspx
7 Note that a NDM is usually smaller than the DMA in which Scarborough conducts surveys to collect readership data.

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