

Consumer Usage of Newspaper Advertising

2006

PREPARED BY MORI RESEARCH



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1. Introduction

Preprints, also known as advertising inserts, circulars or flyers, have been an extremely important component of American newspapers.

The media world has changed significantly in recent years. The changing media landscape, especially regarding advertising, is the subject of constant discussions in industry forums and the popular press, so it is timely to discuss the subject of preprints and other forms of newspaper retail advertising.

This report addresses various issues relating to preprint and newspaper advertising in general, including:

- How often do people actively seek advertising and shopping information?
- Where do they turn, and when?
- Where does newspaper advertising (especially the preprint) now stand in light of recent, media-consumption changes?
- What advantages do consumers see with newspaper preprints?
- What form of preprint delivery do consumers prefer?
- How important are preprints in relation to other newspaper content?
- Which preprints do consumers read, and what is the shelf life of those preprints?
- What do readers prefer regarding preprint size and format?

The study also addresses several other advertising-related issues, including ROP advertising readership and readership drivers, print-and-online coupon usage and preferences, advertising on spadea sheets and newspaper delivery bags, and an extended look at online shopping.

This report discusses results from a telephone survey of 3,008 American adults. The research was conducted by MORI Research of Minneapolis. Fieldwork took place in March-April 2006. Technical details are in the appendix.

A Note on Terms: The terms “inserts,” “free-standing inserts,” “FSIs,” and “preprints” are used more or less interchangeably in the industry. In this report “inserts” and “preprints” refer to newspaper formats of this advertising. Occasional references to preprints delivered by direct mail are clearly noted.

2. Overview

The following summarizes the research findings presented in more detail in the following chapters.

Checking Advertising

There has been much recent discussion in the advertising community about “audience engagement,” or getting the attention of consumers who have become resistant to a constant barrage of commercial messages.

- However, this research finds that almost two-thirds of American adults actively check advertising at least weekly for things they might want to buy. They are selective about when and where they check advertising; the focus of this report.
- Consumers may consult advertising at any time, but Sunday is by far the most likely day for about one-half of shoppers, while Saturday is a distant second—noted by one-fifth of consumers. The only other days in double figures are Wednesday and Friday, at 13 percent each. Sunday newspaper and preprint readers drive the preference for Sunday, as they are far ahead of nonreaders on this indicator.

Media Choices for Shopping Planning

Despite readership declines, newspapers are, by a substantial margin, the leading destination for people interested in checking advertising and shopping information. This pattern is consistent across several indicators, including:

- Usage of different media in both the previous 7 days and previous 30 days
 - Primary shopping and advertising information source among media in general
 - Primary shopping and advertising source for major store categories individually
 - Preferred media source for preprint delivery, and
 - Preferred media source for nongrocery coupons.
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- For example, 53 percent of adults used newspapers to make a shopping or purchase decision in the previous 30 days, while 27 percent used the Internet, which now is the second-leading source.
 - The Internet effect is consistent with high-income (\$100K+) shoppers, who are lower on newspapers and higher on the Internet on several usage and attitude measures in this survey. Even with this group, however, almost one-half say that newspapers are their primary shopping medium, compared with one-third who rely on the Internet.
 - The other strong Internet segment is young adults. A plurality among those age 18-24 consider the Internet to be their primary advertising source, but reliance on newspapers (including preprints) jumps markedly among the 25-34 age group who are married with children.

Preprint Reading

- Newspaper-insert usage remains substantial. Almost half (46 percent) of adults used newspaper preprints in the previous week for shopping planning, as did 64 percent in the past 30 days. Three-fourths of adults (77 percent) read preprints at least occasionally.
- Some questions in this survey gauged the interest in preprints relative to various other sections of the newspaper. Only the main news and the local news sections exceed preprint readership among newspaper readers (60 percent always or usually reading, and 84 percent reading at least occasionally.) One reason for the high score is that single-copy buyers match subscribers in their readership of preprints.
- Insert readership is especially strong among women and primary household shoppers (who tend to be women). Men, however, lead on some store categories. Minority adults, especially African Americans, also are consistently above average in reading preprints.
- Regular readership for 10 major store categories averages 51 percent among newspaper readers and ranges from 19 percent for cell-phone stores to 79 percent for food stores.
- Newspaper readers (48 percent) say they look through most inserts. Other readers divide about equally between looking at inserts from their regular stores, plus a few others, and looking at only those from their regular stores.
- Majorities of insert readers will look beyond their regular stores when they want to compare prices, to check different stores for a particular product, or if they are curious about an unfamiliar store.
- Almost one-half (45 percent) of newspaper-preprint readers have played the advocate role in the previous 30 days by suggesting to friends or relatives that they look at a particular insert. Almost as many (41 percent) took an insert with them while shopping in the past month.
- Preprint readers keep their preprints for an average of four days.
- Three-fourths of newspaper readers notice spadea ads. For those readers, around 4 in 10 usually note what is being advertised in the spadea.
- Readership of preprints by direct mail is considerably lower than it is for newspapers: 29 percent in the past 7 days and 46 percent in the past 30 days. Consumers also prefer newspaper delivery over direct mail by a more than two-to-one margin. Sunday subscribers feel especially strongly about this.

Preprint Readership Benefits and Occasions

- Several attitudinal indicators show that consumers use inserts because they facilitate the shopping process in various ways. Easing comparison shopping, weekly availability and savings of time and money are the highest-rated benefits for around two-thirds of readers. At a slightly lower level is the belief that preprints accurately show what products look like.
- The leading occasions for using preprints are for checking sales or when one is in the market to buy something (three-fourths of readers). Two-thirds of readers like to browse even when they are not looking for anything in particular, while around one-half use inserts to plan their regular shopping.
- Half of readers express having seen or heard promotions for Sunday newspaper preprints at least occasionally.
- The survey gauged reader preferences on several items.
 - Sunday is the preferred day for preprint delivery for 57 percent of readers. (Two-thirds of readers said they look at inserts when inserted with weekday newspapers.)
 - There is no consensus on preferred page size for preprints, as 37 percent favor newsweekly size, 30 percent favor tabloids, and 20 percent like broadsheets. On the other hand, preference for glossy pages over newsprint is robust.

- Readers like fewer pages rather than more. Eight-page inserts are preferred over 24-pages by a two-to-one margin, while very small groups of consumers prefer larger options. The reasons for choices all have to do with cutting points when trading off ease of use against more complete information.
- Online shoppers by more than a two-to-one margin say that products are displayed more realistically online than in printed inserts. About one-half of online shoppers are aware of electronic versions of newspaper preprints that are available at major store Web sites.
- Newspaper Web site users, however—who tend to be among the most active online shoppers—favor printed inserts over online versions by a two-to-one margin, which suggests that online preprints are not as convenient or easy to use.

Newspaper ROP Advertising

- Almost nine in ten newspaper readers at least occasionally read run-of-paper (ROP) ads. Two-thirds normally read or glance at them as they page through the paper, while one in five readers say they look only when they are in the market for something.
- There is little demographic variation among ROP readers other than women and Hispanics being above average, and high-income adults being somewhat below-average. Preprint readers and coupon savers also are strong ROP readers.
- ROP readers appear to be attracted by ads that have coupons, or ads promoting sales or special savings, or most especially, ads that show prices, whether or not a sale is on.

Other Advertising Vehicles

- In the previous 30 days, half of adults have received, through mail or home delivery, a free shopper publication with preprints, and 42 percent of adults said they had received one in the previous week. Three-fourths of those who receive these publications say they read at least some of the advertising inserts that come with them.
- Almost half of consumers regularly or occasionally save nongrocery coupons. Two-thirds of coupon savers prefer newspapers for coupon delivery (mostly on Sundays). Consumers in the \$50,000 to \$99,000 income range are active in saving coupons as well.
- Half of newspaper subscribers have seen plastic delivery bags, and half of them, or one-fourth of subscribers, said they usually read the ads.

Internet Shopping and Advertising

- Three-fourths of adults with Internet access have shopped online in the past 30 days. This represents about half of all adults. The incidence of gathering information for online buying is slightly higher than for purchases at “regular” stores. Newspaper Web site visitors are far above average on each type of online shopping measured, which is consistent with other research regarding newspaper site users.
- Online shopping generally increases with each increment of household income. Young adults also are strong online shoppers, but those age 18-to-24 are more likely to use online information to buy at brick-and-mortar stores, while 25-to-34-year-olds are more likely to buy online.
- Most online shoppers view their experience positively, describing it as convenient, quick, easy, satisfactory and excellent, among other adjectives. Only 10 percent of shoppers were critical in their appraisal. Three-fourths of online buyers said they would be likely to make the same purchase again.
- One quarter of all adults have visited newspaper Web sites in the past month. Six in ten Web site users cited advertising as a reason why they visit, including 30 percent who mention shopping information for retail stores.

3. Using Advertising Media

Audience “engagement” is a hot topic in recent advertising-community discussions because of the high level of media fragmentation, the volume of advertising bombarding consumers and advertisers’ concerns about return on investment. Engagement can be defined in different ways, but this report focuses on intentionality among consumers. That is, how often, when and where do consumers go when they want to see advertising?

Checking Advertising

The survey asked respondents how often they “check out advertising or shopping information for things you might want to buy.” Almost two-thirds of American adults said they do this at least weekly, with 1 in 5 adults conducting this search daily and another 42 percent saying less often, but at least weekly.

QUESTION: ABOUT HOW OFTEN DO YOU CHECK OUT ADVERTISING OR SHOPPING INFORMATION FOR THINGS YOU MIGHT WANT TO BUY: ALMOST EVERY DAY, AT LEAST ONCE A WEEK, EVERY FEW WEEKS, OR LESS OFTEN?

Frequency of Checking Advertising

Once a week or more often	62%
Almost every day	20
At least once a week	42
Every few weeks or less often	37
Every few weeks	12
Less often	25
Don’t know/Refused	1

Base = Total

The propensity to check ads at least weekly is widespread with moderate variations among differing demographic groups.

- As we would expect, women (68 percent) lead men (56 percent) in each age group. Primary household shoppers (who tend to be women) also are high at 67 percent. For both genders, regular ad checking increases slowly with age, with the 55+ group leading the 18-to-34 group by 10 points. Middle-income adults (65 percent) are somewhat higher on this measure compared with those above \$100,000 or below \$35,000 (both at 59 percent).
- Characteristics related to shopping strongly influence intentional advertising consumption. Weekly checking is especially high among coupon savers (78 percent) and those who regularly use newspaper preprints (76 percent). Even higher are consumers who use newspapers as their primary source of advertising (82 percent).
- Newspaper reading in general drives advertising usage. For example, 71 percent of frequent weekday readers (4-6 issues per week) consult advertising weekly, compared with 61 percent among those who read less often, and only 47 percent for nonreaders.
- Newspaper Web site users also are above average, with 68 percent consulting advertising at least weekly.

Days of the Week for Checking Advertising

When do consumers check advertising to plan shopping? Half of respondents by a large margin were most likely to reserve Sundays for this purpose. Saturday followed at 21 percent, and Friday and Wednesday at 13 percent each.

QUESTION: WHICH ONE OR TWO DAYS OF THE WEEK ARE YOU MOST LIKELY TO CHECK OUT ADVERTISING FOR THINGS YOU MIGHT WANT TO BUY?

Days Advertising Most Often Checked

Sunday	49%
Monday-Saturday (net)	54
Monday-Thursday (net)	27
Friday-Saturday (net)	30
Monday	5
Tuesday	5
Wednesday	13
Thursday	7
Friday	13
Saturday	21
Varies/No pattern/None	10
Don't know/Refused	3

Base = Total

- Women (53 percent) are more likely than men (45 percent) to check ads on Sundays.
- Adults age 35-to-54 (54 percent) are more likely than older (49 percent) or younger (43 percent) adults to check ads on Sundays.
- The propensity to check ads on Sundays generally increases with income but peaks at \$75,000 to \$99,000 (58 percent).
- Sunday newspaper reading clearly drives the preference for advertising on Sunday. For those citing Sundays, three-fourths (73 percent) consider newspapers to be their primary advertising medium. Similarly, 65 percent of adults who read the Sunday newspaper every week mentioned Sunday as a primary day for checking advertising. This compares with 40 percent among less frequent Sunday newspaper readers, and only 20 percent among nonreaders.
- Similar numbers for Sunday for newspaper preprint readers were discovered. Among self-described, regular preprint readers, 61 percent favor Sundays, compared with 47 percent for occasional readers, 36 percent for those who read less often and 27 percent for nonreaders of newspaper preprints.
- Demographic subgroups more likely to check ads on days other than Sunday include: Low-income adults (62 percent Monday-Saturday); the 18-to-34 age group (58 percent); and adults living in the Southern census region (57 percent).
- Monday-Thursday preference is relatively high for adults age 55+ (35 percent), while the Friday-Saturday preference is higher for the 18-to-34 age group (40 percent).
- Men lead women on Fridays (16 percent vs. 11 percent), while the numbers are reversed on Wednesdays.

Medium Used Most Frequently for Advertising

A key indicator of advertising “wantedness” is where consumers choose to go when the purpose is to gather information for shopping. While the Internet has gained significantly as a preferred medium for shopping-information seekers, newspapers remain by far the dominant shopper destination.

- More than half of adults said they use newspapers most of the time for checking ads for things they might want to buy.
- Only one-third as many respondents chose the Internet, followed by direct mail at 9 percent and television at 8 percent.
- Sixty-two percent of newspaper readers cite newspapers as their primary source.

QUESTION: WHICH ONE OF THE ADVERTISING MEDIA I WILL NAME DO YOU USE MOST OF THE TIME TO CHECK OUT ADS FOR THINGS YOU MIGHT WANT TO BUY

Advertising Medium Used Most of the Time

Newspapers	55%
Internet	19
Direct mail	9
Television	8
Magazines	4
Radio	2
Yellow Pages	1
Billboards	<0.5
None of these/Don't know/Refused	2

Base = Total

Looking at use of newspapers and the Internet for advertising by demographics, we note the following tendencies:

- As would be expected, the 18-34 age group is most likely to rely on the Internet (32 percent) or to rely on television (13 percent). Nonetheless, a plurality of more than one-third (36 percent) of these young adults use newspapers most often for shopping information.
- Reliance on newspapers is higher among older adults. Among adults age 35-54, 60 percent rely on newspapers and 17 percent shop on the Internet. Among those age 55+, 70 percent rely on newspapers and only eight percent shop on the Internet.
- Six-figure-income adults are generally less likely than middle-income consumers to rely on newspapers for shopping and more likely to shop on the Internet. This pattern is consistent over several indicators in this study. Nevertheless, newspapers lead the Internet as the primary ad medium with this group by a 45-percent to 32-percent margin.

Advertising Medium Used Most of the Time

	Newspapers	Internet	Direct Mail	Television
Total	55%	19%	9%	8%
Primary Shopper	61	14	11	6
Men	50	24	7	9
Women	60	14	12	6
18-24	28	39	7	10
25-34	41	28	10	14
35-54	60	17	10	5
55+	70	8	9	5
African-American	55	16	13	6
Hispanic-origin	45	23	11	10
Northeast Region	55	17	9	10
Southern Region	52	19	10	9
Midwest Region	63	15	8	5
Western Region	54	23	10	6
<\$35,000	54	13	12	10
\$35,000-\$49,999	64	14	9	5
\$50,000-\$74,999	59	19	8	8
\$75,000-\$99,999	56	22	6	6
\$100,000+	45	32	8	6

Base = Total

Media Used Recently for Advertising

Direct questions about actual recent media usage for shopping corroborate the patterns of media reliance reviewed above.

- One-half of consumers used newspapers in the past seven days to help plan shopping or make purchasing decisions, as did 71 percent over the past 30 days. Newspapers remain well ahead of other media on these indicators of recent, actual usage for shopping.
- The Internet is second for both past week and past 30 days.
- Women are more likely than men to use newspapers (63 percent vs. 51 percent) and direct mail (26 percent vs. 15 percent) for advertising in the past week, while men are more likely than women to use the Internet (35 percent vs. 24 percent) and radio (8 percent vs. 3 percent).
- Reliance on newspapers is mostly consistent across income groups but drops somewhat at the \$100,000+ household-income level. Reliance on the Internet, however, increases with income. High-income adults are equally likely to cite newspapers and the Internet for recent shopping (around 47 percent each for the past 7 days).

QUESTIONS: NOW FOR EACH MEDIUM I NAME, PLEASE TELL ME IF YOU USED ADVERTISING FROM IT IN THE PAST 30 DAYS TO HELP PLAN SHOPPING OR TO MAKE PURCHASING DECISIONS. NOW PLEASE TELL ME WHICH MEDIA YOU USED IN THE PAST 7 DAYS TO HELP PLAN SHOPPING OR TO MAKE PURCHASING DECISIONS.

Advertising Media Used

	Past 30 Days	Past 7 Days
Any listed (net)	93%	81%
Newspapers	71	53
Internet	45	27
Television	42	15
Direct mail	39	20
Magazines	31	9
Yellow Pages	21	6
Radio	19	5
Billboards	6	1
Don't know/Refused	<0.5	<0.5

Base = Total

- The 18-to-34 age group is very diverse in terms of the advertising media they choose, relying on the Internet (42 percent), newspapers (39 percent) and television (25 percent) in large numbers over the past week. This group is more likely to use the Internet, while the 25-to-34 age group is equally likely to use newspapers and the Internet.
- African Americans and English-speaking Hispanics, who tend to be younger than average, also are more varied in their advertising-media choices, with above-average use of television (27 percent) and, among Hispanics, above-average use of magazines (17 percent) and radio (11 percent), as well.
- The Internet leads newspapers narrowly for computer stores and cell-phone stores, and is second in five categories: office supplies, sporting goods, appliances, home furnishings and home electronics. In the first four categories, Internet shopping is a *distant* second, at least 30 points behind newspapers.

QUESTION: AMONG DIFFERENT ADVERTISING SOURCES, WHICH ONE ARE YOU MOST LIKELY TO CHECK WHEN YOU ARE THINKING OF BUYING SOMETHING FROM THE FOLLOWING TYPES OF STORES?

Advertising Source Used Most When Shopping Stores

	Newspapers	Direct Mail	Internet	TV	Magazines	Yellow Pages	Radio	Bill-board
Grocery or food stores	71%	22%	2%	3%	1%	1%	<0.5%	<0.5%
Department stores	62	16	10	6	3	1	1	<0.5
Drug stores	62	17	7	7	2	4	1	<0.5
Discount stores	61	18	10	5	2	2	1	1
Home building centers	57	16	13	6	3	4	1	<0.5
Office supply stores	54	12	19	6	3	4	1	<0.5
Sporting goods stores	53	12	18	5	7	4	1	<0.5
Appliance stores	52	12	21	6	4	4	1	<0.5
Home furnishings stores	51	14	17	10	4	3	1	<0.5
Home electronics stores	48	10	29	6	3	3	1	<0.5
Computer stores	34	10	44	5	3	3	1	<0.5
Cell phone stores	27	13	34	18	2	4	2	1

Base = Adults naming any media source (bases vary by store category)

- Direct mail is second to newspapers in the remaining five categories: grocery, drug, discount, building centers, and department stores. In the latter two categories, however, the gap between direct mail and the Internet is narrow.
- Television has by far the largest share in the cell-phone category at 18 percent.

Reasons for Choice of Medium: An open-ended, follow-up question summarized in the table below provides insight into why respondents prefer different media for shopping information.

Consumers who generally prefer newspapers, Internet or direct mail all cite convenience and price information, but in different degrees. Internet users strongly emphasize convenience (61 percent) but also note ease of price comparisons, and breadth and depth of information. Newspaper users also emphasize habit, sales information and coupons.

- Discount store and home furnishing shoppers are especially likely to cite convenience regarding newspapers.
- Shoppers from appliance stores, home building centers, office supply stores and food stores are more likely than average to mention habit regarding using newspapers.
- Shoppers from appliance and computer stores valued price comparisons in newspaper ads, while food store shoppers were more likely to mention coupons.
- Computer and home electronics store shoppers were above average in citing the variety and selection in newspaper advertising.

QUESTION: WHY ARE YOU MOST LIKELY TO CHECK [MEDIUM] INSTEAD OF OTHER ADVERTISING SOURCES WHEN YOU ARE PLANNING TO SHOP AT [STORE TYPE]?

Reasons for Preferring Shopping Information Source

	Newspapers	Internet	Direct Mail
Easy to use/efficient (net)	36%	61%	38%
Easy to use, available, convenient	35	58	37
Saves time, efficient	1	14	1
Use to this source (net)	24	2	13
Frequently use for this type of store	17	2	7
Has ads for stores usually shop	7	--	6
Price information (net)	23	29	26
Provides sales notices/discounts/coupons	18	26	22
Can compare to get best deal	6	4	5
Only source that has the information	13	4	11
Better selection/information	7	18	9
Credible source	6	7	5

Base = Prefer source for shopping at selected stores (partial sample; base varies)

4. Using Preprints

This chapter addresses several questions regarding how consumers routinely use preprints. How many adults use preprints from newspapers and from direct mail to plan shopping? Which delivery channel do they prefer? How important are preprints in the decision to read Sunday newspapers? How often do readers use newspaper preprints and for which types of stores? How selectively do readers scan preprints, and what is their shelf life?

Newspaper vs. Direct Mail Preprints

Newspapers: The use of newspaper preprints to plan shopping, or to make purchasing decisions, is widespread among American adults. Measures of past-7-day and past-30-day usage show that about one-half of American adults (46 percent) used weekday or Sunday preprints in the past seven days to make purchasing decisions. About two-thirds (64 percent) did so in the past 30 days. Past-30-day use of newspaper preprints is especially high among these groups:

- Primary household shoppers (72 percent)
- Women (70 percent); especially age 35+ (74 percent)
- Middle-income adults (71 percent among \$35K-\$99K households)
- Northeast and Midwest census regions (69 percent each)
- Coupon users (84 percent)
- Sunday subscribers (78 percent) and single-copy buyers (69 percent)

Past-30-day, newspaper-insert usage increases with age from 43 percent for those age 18-to-24, to 59 percent for 25-to-34-year-olds, to 69 percent for those age 35-plus. Shopping habits typically change with the arrival of children, and those age 18-to-34 who are married and have children are far more likely to use newspapers inserts compared with their peers who are single and without children (62 percent vs. 44 percent).

Upper-income (\$100K+) adults measure at 51 percent for past 30-day usage of newspaper preprints. As discussed elsewhere, high-income consumers are most likely to substitute the Internet for traditional media in shopping. On the other hand, the reach of newspaper preprints among this audience is substantial.

QUESTIONS: FIRST, DURING THE PAST 30 DAYS, DID YOU USE ANY ADVERTISING INSERTS THAT CAME WITH A WEEKDAY OR SUNDAY NEWSPAPER ADVERTISING CIRCULARS THAT CAME IN THE MAIL, TO HELP PLAN SHOPPING OR TO MAKE PURCHASING DECISIONS? HOW ABOUT IN THE PAST 7 DAYS?

Used Weekday or Sunday Newspaper Inserts

Past 30 days	64%
Past 7 days	46

Used Direct Mail Circulars

Past 30 days	46%
Past 7 days	29

Base = Total

Direct Mail: Three in 10 adults used direct mail in the past seven days to make purchasing decisions. About half did so in the past 30 days. The 30-day effective reach of direct-mail preprints matches the 7-day reach of preprints delivered with newspapers (46 percent).

The demographics of direct mail preprint users are less differentiated than for newspaper preprints. Among past-30-day users, women lead men 53 percent to 38 percent, which is the largest demographic gap. Otherwise, usage is lower than average among the 18-to-24 age group, those 65 or older and among high-income adults.

Additionally, there is considerable overlap of audiences, as 80 percent of adults who used direct-mail preprints in the past 7 days also used newspaper preprints. (A smaller proportion—50 percent—of newspaper preprint readers also used direct-mail circulars over the past 7 days.)

Duplicate & Exclusive Preprint Usage

	Past 30 Days	Past 7 Days
Advertising inserts only	25%	23%
Direct Mail circulars only	7	6
Both	39	23
Neither	29	49

Base = Total

Preference for Newspaper or Mail: There is a greater than two-to-one consumer preference for newspaper over direct-mail for preprint delivery. Presently, 60 percent of adults prefer newspaper preprints (most feel strongly this way) while 26 percent would take direct mail.

QUESTIONS: IN GENERAL, HOW DO YOU PREFER THAT MOST ADVERTISING INSERTS OR CIRCULARS BE DELIVERED: WITH NEWSPAPERS OR WITH YOUR MAIL? DO YOU FEEL STRONGLY ABOUT THAT OR NOT STRONGLY?

Preference for Preprint Delivery Channel

Newspapers	60%
Feel strongly	42
Do not feel strongly	18
Mail	26
Feel strongly	16
Do not feel strongly	10
No preference	14

Base = Total

Women are about average on this question, with 57 percent for newspapers and 30 percent choosing direct mail, but men more strongly prefer newspapers (64 percent).

Others likely to prefer newspaper preprints include those with household incomes from \$50,000 to \$99,000 (67 percent), adults living in the Midwest (66 percent), and regular preprint readers (68 percent).

Sunday subscribers have the strongest feelings, with 76 percent preferring preprints and 55 percent strongly preferring them. Preprints in fact are a significant reason for getting the Sunday newspaper, as discussed below.

Advertising and the Decision to Read the Sunday Newspaper

Preprint Readership: Fifty-six percent of American adults say they read or look at newspaper preprints “regularly,” and 22 percent do so “occasionally,” for a net of 78 percent. Another 11 percent of adults describe their preprint reading as “seldom,” leaving only 11 percent of adults who never read newspaper preprints.

- The table below profiles preprint readers as using the “regular” or “regular or occasional” time frames. What stands out is the uniformity across most categories. At the high end of regular readers are two crucial groups: women (65 percent) and the primary shoppers in their households (66 percent).
- Regular reading is much lower than average among the 18-24 age group but becomes average starting with the next age group.

Newspaper Preprint Readership Among All Adults

	Regular	Regular or Occasional
Total	56%	78%
Primary Shopper	66	83
Men	48	74
Women	65	83
18-24	34	71
25-34	54	77
35-54	60	81
55+	62	79
African-American	61	87
Hispanic-origin	50	79
Northeast Region	58	82
Southern Region	57	77
Midwest Region	60	81
Western Region	51	75
<\$35,000	57	79
\$35,000-\$49,999	63	81
\$50,000-\$74,999	57	82
\$75,000-\$99,999	57	81
\$100,000+	48	67

Base = Total

- The other group standing out as below-average is the \$100,000+ income category, which is consistently lower on several usage questions in this survey due, apparently, to their increasing reliance on the Internet. At the same time, half of this group are regular readers and two thirds read at least occasionally.

Advertising and News Content: American adults cite news over advertising as the dominant reason for buying or reading Sunday newspapers (51 percent over 31 percent). This means, however, that advertising is very important for a large segment of readers.

QUESTION: WHICH IS USUALLY MORE IMPORTANT TO YOU IN YOUR DECISION TO BUY OR READ A SUNDAY NEWSPAPER: THE NEWS ARTICLES AND FEATURES IN THE DIFFERENT SECTIONS OF THE PAPER OR THE ADVERTISING CARRIED BY THE NEWSPAPER?

News articles & features	51%
Advertising	31
Both	11
Never read Sunday newspapers	7
Don't know/Refused	1

- Young women (48 percent of those age 18-34), adults of Hispanic origin (45 percent), coupon users (42 percent), parents (39 percent) and renters (39 percent) are especially likely to buy Sunday newspapers mainly for the advertising. In general, interest in news content increases with age.
- African Americans choose news (44 percent) over advertising (33 percent).
- Higher-income adults are generally more likely to read Sunday newspapers for the news content rather than for the advertising.
- Sunday single-copy buyers are about average on this question, but subscribers—who are strongest in their preference for newspaper preprints over direct mail—strongly favor news content (61 percent) as the primary reason for getting the Sunday newspaper.

Inserts Among Other Newspaper Sections: Another way to gauge the importance of preprints for newspaper readers is to compare against section readership. Advertising inserts are the third-most read among standard newspaper sections, with 60 percent of newspaper readers saying they always or usually read this content, and 84 percent reading at least occasionally.

- Inserts trail only the main or front news section and local news, while other sections appeal to much smaller segments of the newspaper audience.
- Single-copy buyers trail subscribers on news-and-feature-section readership, but they are identical with subscribers on inserts, with 60 percent always or usually reading. (Single-copy buyers lead subscribers on classified advertising.)

QUESTION: PLEASE TELL ME WHETHER YOU USUALLY READ OR LOOK AT THE FOLLOWING SECTIONS OR PART OF THE NEWSPAPER ALWAYS, USUALLY, OCCASIONALLY, SELDOM, OR NEVER.

Section Readership

	Always/Usually	Occasionally	Seldom/Never
Main or front news section	85%	10%	5%
Local news section	78	14	8
Advertising inserts	60	24	16
Food section	47	23	30
Entertainment section	43	30	27
Sports section	38	19	42
Business section	35	27	38
Classified advertising	30	28	42

Base = Read weekday newspaper in past week or Sunday newspaper in past four weeks

Newspaper Preprint Readership by Category

Regular Reading for Major Store Categories: Respondents who read newspaper preprints (89 percent of adults) noted which of 12 major store categories in the Sunday newspaper they regularly check. Department- and discount-store preprint use is still widespread at 72 percent and 66 percent, respectively. Food-store preprints have the highest readership at 79 percent.

- It is notable that preprint reading for different retail segments is about the same when we compare subscribers, single-copy buyers, and readers who usually find unpaid or “pass-along” copies of the newspaper. These three groups are within a few points of each other on each category, with no consistent pattern.

QUESTION: PLEASE TELL ME IF YOU REGULARLY CHECK SUNDAY INSERTS FROM ANY STORES FROM THE FOLLOWING GENERAL CATEGORIES.

Regularly Check Sunday Inserts by Category

Grocery or food stores	79%
Department stores	72
Discount stores	66
Home building centers	57
Home electronics stores	54
Drug stores	52
Home furnishings stores	48
Appliance stores	44
Sporting goods stores	43
Computer stores	40
Office supply stores	39
Cell phone stores	19

Base = Adults who ever read or look at newspaper advertising inserts

- Women, primary shoppers, and coupon savers are more likely to use preprints from most store categories. Four exceptions are home-improvement centers, home electronics, and sporting goods and computer stores; for which preprints are used more widely by men than by women. Two additional exceptions are office-supply and cell-phone stores, which appeal about equally to men and women.
- Young adults are close to the average on most categories but lead other age groups on home electronics, sporting goods, computer stores and cell-phone stores. Homebuilding centers, home-furnishings stores and appliance stores appeal to home buyers, and in fact, the 25-to-34 age group is more like the 35-54 age category than those age 18-to-24 for these types of stores.

Regularly Check Sunday Inserts by Category—by Age and Gender

	Total	Men	Women	18- 34	35- 54	55+
Grocery or food stores	79%	72%	86%	75%	80%	83%
Department stores	72	61	82	72	76	68
Discount stores	66	58	74	61	70	67
Home building centers	57	62	53	46	68	56
Home electronics stores	54	63	45	69	58	33
Drug stores	52	39	64	45	52	59
Home furnishings stores	48	40	55	49	54	40
Appliance stores	44	45	43	47	48	35
Sporting goods stores	43	55	31	52	46	28
Computer stores	40	50	31	53	44	23
Office supply stores	39	41	37	38	43	34
Cell phone stores	19	20	18	30	17	10

Base = Adults who ever read or look at newspaper advertising inserts; Bold = above average

Selective Reading and Acting on Preprints

Other questions relating to Sunday-preprint usage include how readers select which preprints to review from the large selection that typically comes with the newspaper, the typical preprint shelf life, ways in which readers respond to the advertising and awareness of insert-promotion advertising.

Selectivity in Reading Newspaper Preprints: One-half of preprint users say they look at most of the inserts that come with the paper. Others read more selectively: 26 percent look at inserts from stores they regularly shop, plus a few others, while 22 percent look only at inserts from their regular stores.

QUESTION: WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU HANDLE THE SUNDAY STORE INSERTS?

Manner of Looking Into Sunday Store Inserts

Look through most inserts	48%
Look at inserts from stores shop & a few others	26
Only look at inserts from stores shop regularly	22
Other/Don't know/Refused	3

Base = Adults who ever read or look at newspaper advertising inserts

- Consumers who are most likely to read preprints also are most likely to look through the entire set that comes with the Sunday paper. This includes women in general but especially those age 35-54 (57 percent), African Americans (62 percent) and single-copy buyers (56 percent).
- Selectivity in reading also is inversely related to income, with 55 percent selectivity for those with household incomes below \$35,000, down to 33 percent selectivity for those with household incomes at \$100,000 or more. The high-income group is far more likely than others to look only at inserts from their regular stores (31 percent).
- What situations encourage looking at inserts beyond one's usual stores? Six in ten insert readers noted three scenarios for this behavior: comparing prices, searching for a certain product and curiosity about a new store.

QUESTION: SOMETIMES YOU MAY DECIDE TO LOOK AT ADVERTISING INSERTS FROM STORES YOU DO NOT USUALLY SHOP. PLEASE TELL ME HOW MUCH THE FOLLOWING REASONS FOR LOOKING AT THESE TYPES OF INSERTS APPLY TO YOU, USING A 1-TO-5 SCALE, WITH "1" MEANING THEY STATEMENT DOES NOT APPLY AT ALL, AND "5" MEANING IT APPLIES EXTREMELY WELL.

Reasons Look at Advertising Inserts from Stores Not Usually Shopped (Rating 4-5)

Want to compare prices	64%
Checking different stores for a particular product	60
Store is new to you & you are curious	58

Base = Adults who ever read or look at newspaper advertising inserts

Actions Taken with Newspaper Preprints: Shoppers can act on advertising in a variety of ways, but the survey measured two consumer actions in particular.

- Almost one-half of readers (45 percent) in the previous 30 days had suggested to friends or relatives that they look at a particular preprint.
- Almost as many (41 percent) had taken an insert along while shopping in the past 30 days. Together, the two activities net to 61 percent of readers.
- Women (69 percent) are more likely than men (53 percent) to engage in these activities, as we would expect given their greater interest in preprints and shopping. In particular, 18-34 (56 percent) and 35-54 women (53 percent) are most likely to suggest looking at a preprint. Middle-aged women also are most likely to take preprints with them while shopping (53 percent).
- Groups who tend to be strong preprint readers also are above average on these activities, including coupon users, African Americans, Hispanic adults and primary household shoppers.

Preprint Shelf Life: Shoppers keep inserts that interest them an average of four days.

QUESTION: FOR HOW MANY DAYS DO YOU USUALLY KEEP THE SUNDAY STORE INSERTS YOU ARE INTERESTED IN?

Number of Days Keep Sunday Store Inserts

One	17%
Two to five (net)	51
Two	19
Three	19
Four	7
Five	6
Six or more (net)	26
Six	2
Seven	21
More than Seven Days	3
Don't save/Don't know/Refused	5
Mean	4.0
Median	3.1

Base = Adults who ever read or look at newspaper advertising inserts

Spadea

Seven in 10 American adults have seen “spadea,” an advertising flap that wraps around the bottom or the side of the page. Among readers who have seen these ads, the proportion who say they usually notice what is advertised on the flap is 43 percent.

Midwestern and Western region adults (both 74 percent) are more likely than other regions to have seen spadea but are not more likely to notice the content. Young adults (48 percent of those age 18-to-34), particularly young men (56 percent), are more likely to notice what is advertised on the flaps. Minorities are also more likely to do so (64 percent of African Americans and 50 percent of Hispanics), as are renters (55 percent), coupon savers (52 percent), and low-income adults (50 percent). These higher regional levels perhaps may be due to more time spent watching television and, perhaps, more time spent looking at the TV listings booklet.

QUESTION: SOME NEWSPAPER SECTIONS, SUCH AS THE SUNDAY COMICS OR THE TV LISTINGS BOOKLET, MAY COME WITH AN ADVERTISING FLAP THAT WRAPS AROUND THE BOTTOM OR THE SIDE OF THE PAGE. HAVE YOU SEEN THESE KINDS OF ADS?

See Newspaper Advertising Flaps (Spadea)

Yes	73%
No	24
Never read advertising inserts	n/a
Don't know/Refused	3

Base = Adults who read a Sunday newspaper in the past month or a weekday newspaper in the past week

QUESTION: WHETHER OR NOT YOU LIKE THESE ADS, DO YOU USUALLY NOTICE WHAT IS BEING ADVERTISED IN THEM WHEN YOU SEE THEM, OR DO YOU NOT NOTICE?

Notice What is Advertised on Advertising Flaps (Spadea)

Usually notice	43%
Don't notice	55
Don't know/Refused	2

Base = Adults who have seen newspaper advertising flaps

5. Preprint Occasions, Benefits and Preferences

Usage Occasions and Benefits

Several attitudinal indicators show that consumers use inserts because they facilitate the shopping process in various ways.

- The top consumer benefits provided by newspaper inserts include making comparison shopping easier, predictable availability and saving time and money. Accurate product display and insert portability also appeal to large groups of consumers.
- Leading occasions for perusing preprints include routine scanning for sales, searching when definitely in the market for something or window shopping. Almost half of readers say they use preprints for planning their “regular” shopping.

The table below shows the percentage of all newspaper-insert readers who gave “4” or “5” ratings (positive) on a one-to-five agreement scale.

- Regular preprint readers have higher-than-average scores on these items, as we would expect. Among demographic groups, women and minority adults tend to be more positive than average.
- High-income (\$100,000+) consumers scored below average on most items, which seems due to their greater reliance on the Internet for shopping information. The youngest adults (age 18-24) also tend to be less enthusiastic compared with 25-to-34-year-olds.

QUESTION: NOW PLEASE TELL ME HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENTS ABOUT ADVERTISING INSERTS IN THE SUNDAY NEWSPAPER. WE ARE USING A 1-TO-5 SCALE, WITH “1” MEANING YOU DO NOT AGREE WITH THE STATEMENT AT ALL, AND “5” MEANING YOU STRONGLY AGREE.

Sunday Newspaper Insert Benefits (Rating4-5)

Operational Benefits	
Advertising inserts make it easy to comparison shop	69%
Checking store inserts is part of your routine because they are in the paper every week	65
Checking newspaper advertising inserts saves you time & money	62
Insert ads give you a good idea of what products really look like	53
You take inserts with you when you shop	30
Usage Occasions	
You usually check inserts to see what's on sale or other special savings	73%
You make a point to look at inserts when you are in the market for what they are selling	72
You enjoy browsing through inserts even if you are not looking for anything in particular	63
You use store inserts to plan your regular shopping	45

Base = Adults who ever read or look at newspaper advertising inserts

Operational Benefits

Aids Comparison Shopping: Easy comparison shopping is a particular strength of the Internet, although this activity for many people likely is easier to do with preprints, especially when comparing among stores. Overall, agreement with this statement regarding preprints is broad-based at 69 percent.

Predictability: Two-thirds of all users agree that “checking store inserts is part of your routine because you know they are in the paper every week.” Consumers have clear expectations about inserts and the Sunday newspaper, as shown by the very high readership scores compared with other sections of the paper reviewed elsewhere in this report. Very young adults (age 18-24) are much less likely to agree with this statement than those who are age 25-34 (45 percent vs. 60 percent).

Saves Time and Money: Almost two-thirds of readers agree with this concept, which essentially summarizes the range of consumer benefits provided by inserts.

Realistic Presentation: Now, more than half of newspaper-insert readers agree that “insert ads give you a good idea of what products really look like.” Elsewhere in this report, we note that a solid majority of online shoppers say that products are more realistically presented online than in preprints. Among those who feel this way, 44 percent still said that insert ads display products well.

Usage Occasions

Routine Sales Scanning: Three-fourths of newspaper insert readers “usually check inserts to see what’s on sale or other special savings.” Agreement again is quite broad among various target groups, including 18-to-24-year-olds (72 percent) and 25-to-34-year-olds (75 percent), who match the sample average. High-income readers score below average at 62 percent, but this number still represents a strong interest in scanning for sales.

Check When In the Market: Almost three-fourths of readers say they review preprints when they are “in the market” to buy. Other studies have found that being in the market focuses consumer attention on advertising until the need has passed. There is very substantial agreement with this item across analytic groups.

Browsing for Fun: Almost two-thirds of all insert users said they “enjoy browsing through inserts even when you’re not looking for anything in particular,” which is a form of traditional window shopping. Women are well above men on this behavior (72 percent over 54 percent).

Planning Regular Shopping: In the survey, almost half of all insert users use store inserts to plan their “regular shopping.” Women again lead men on this category (53 percent vs. 36 percent). It is almost surprising that the overall proportion isn’t higher, but the “2006 How American Shops and Spends” study by NAA shows that the timeline from plan to execution typically is very brief. Many people still plan “regular shopping,” but probably not on the same scale as in the past.

Take Inserts When Shopping: Women in the 35-54 age group are highest on this question at 42 percent. This item may understate the behavior, though, as we found in a direct question, discussed elsewhere in this report, that 45 percent of newspaper preprint readers carried preprints to a store in the previous 30 days. Easy portability is a hallmark of newspaper preprints and likely has something to do with the preference among many shoppers for small ad formats.

Advertising Cues for Newspaper Preprints

Slightly more than half of American adults recall seeing advertising that referenced Sunday preprints at least occasionally. Only 15 percent, however, say that they see this type of promotional message regularly.

QUESTION: HOW OFTEN DO YOU SEE OR HEAR AN AD OR COMMERCIAL THAT SAYS TO CHECK THE ADVERTISING INSERT OR CIRCULAR IN THE SUNDAY NEWSPAPER?

Frequency of Seeing or Hearing Advertising to Check Sunday Advertising Inserts

Regularly/Occasionally (net)	54%
Regularly	15
Occasionally	39
Seldom/Never (net)	46
Seldom	32
Never	14
Don't know/Refused	<0.5

Base = Adults who ever read or look at newspaper advertising inserts

Sunday single-copy buyers (59 percent) are slightly more likely than subscribers (54 percent) to see these references to Sunday preprints. African Americans (68 percent), coupon users (66 percent), Hispanics (63 percent), Southerners (59 percent), renters (59 percent) and low-income adults (59 percent) are also more likely to recall seeing references to preprints. This could be due to greater use of broadcast media, greater price-consciousness or both. There is no difference between women and men on this measure.

Preprint Preferences

Preferred Preprint Day: Sunday

The preference for Sunday delivery of inserts over other days of the week measured at 57 percent. Preference for Sundays increases with income, from 50 percent among low-income adults (less than \$35K) to 68 percent among high-income consumers (\$75K to \$99K). Preference for Sundays is higher than average among college graduates (63 percent), adults age 35 to 54 (62 percent) and parents with children at home (61 percent).

QUESTION: WHICH ONE DAY OF THE WEEK WOULD BE BEST FOR YOU FOR GETTING NEWSPAPER ADVERTISING INSERTS?

Day Prefer to Receive Newspaper Advertising Inserts

Sunday	57%
Monday-Saturday (net)	37
Monday	3
Tuesday	2
Wednesday	10
Thursday	6
Friday	7
Saturday	9
None/Any/Doesn't matter	4
Don't know/Refused	1

Base = Adults who ever read or look at newspaper advertising inserts

Weekday Newspaper Preprints: Sixty-eight percent of preprint readers said they look at inserts when they appear in their weekday newspapers. Weekday single-copy buyers (78 percent) are about the same as subscribers (74 percent) regarding weekday preprints. Readership is demographically broad-based and does not vary significantly by age. Consistent with Sundays, readership is higher for women (72 percent) than for men (63 percent) and is markedly lower than average for those with \$100,000+ household incomes (49 percent).

Page Size Preference: Variable

Insert readers have no clear preferences regarding page size, voting in order for newsweekly size (37 percent), then for tabloid (30 percent), then for full-size pages (20 percent). Preference for newsweekly size preprints increases with income and education level, reaching 45 percent of adults with six-figure incomes and 42 percent among college graduates. Young adults (45 percent of those age 18-to-34), particularly young women (50 percent of women age 18-to-34), are more likely to prefer newsweekly size preprints.

QUESTION: NOW I HAVE A QUESTION ABOUT THE SIZE OF THE PAGES USED FOR ADVERTISING INSERTS. IN GENERAL, DO YOU PREFER ADVERTISING INSERTS THAT ARE ...?

Advertising Insert Size Preference

Size of regular-sized magazine pages, like Time or Newsweek	37%
Half the size of regular newspaper pages	30
Same size as regular newspaper pages	20
Size of small magazine pages, like Reader's Digest	5
No preference	8
Don't know/Refused	1

Base = Adults who ever read or look at newspaper advertising inserts

Paper Preference: Glossy

Insert readers strongly prefer glossy paper (61 percent) over newsprint (18 percent). Young adults (71 percent of those age 18-to-34), particularly women age 18-to-34 (74 percent), are more likely to prefer preprints on glossy paper.

QUESTION: SOME ADVERTISING INSERTS ARE PRINTED ON GLOSSY PAPER, AND OTHERS ARE ON THE SAME KIND OF PAPER THAT IS USED FOR THE REGULAR PAGES OF THE NEWSPAPER. WHICH ARE YOU MORE LIKELY TO LOOK AT?

Advertising Insert Paper Preference

Glossy paper inserts	61%
Newsprint inserts	18
Doesn't matter	20
Don't know/Refused	1

Base = Adults who ever read or look at newspaper advertising inserts

Number of Pages Preferred: 8 to 24

Readers strongly prefer an insert with 8-24 pages. Brief preprints (8 pages) are preferred over longer inserts (24 pages) by a ratio of two to one. Preference for fewer pages increases with age (71 percent among those age 55+) and education (61 percent of college graduates). Conversely, young adults (48 percent of those age 18-to-24, 34 percent of those age 25-to-34) are more likely than average to prefer longer preprints.

QUESTION: SOME ADVERTISING INSERTS COME WITH EIGHT PAGES, AND OTHERS MAY HAVE A LOT MORE—SAY 24 PAGES OR MORE. IN GENERAL, FOR STORES THAT YOU SHOP, WHICH ONE OF THE SIZES THAT I WILL NAME DO YOU PREFER FOR ADVERTISING INSERTS?

Preferred Number of Pages for Advertising Inserts

8 pages	57%
24 pages	29
48 pages	2
64 pages	3
No preference/No answer	9

Base = Adults who ever read or look at newspaper advertising inserts

Reasons for page number preference: Respondents with an opinion about number of pages were asked in an open-ended question about why they want one size or another for their preprints. The responses are noted below and show the tradeoff between ease of use and breadth of information. Smaller numbers of pages obviously have major cost advantages, but they also create bigger challenges for designers.

- **Eight Pages:** more is too much (34 percent), to the point (25 percent), quick read (26 percent), shows real deals, not entire inventory (13 percent).
- **Twenty-four Pages:** greater variety, comparisons, more sales (42 percent); to the point (20 percent); more is too much (24 percent); less is not enough (12 percent).
- **Forty-eight Pages:** greater variety of products, comparisons and sales (87 percent); more would be too much (11 percent).
- **Sixty-four Pages:** greater variety of products, comparisons, sales (88 percent).

6. Other Print Advertising: ROP, TMC, Coupons and Bags

Preprints are a major part of the total newspaper-advertising package, but hardly the whole story. This chapter reviews consumer behavior and opinions regarding advertising that appears on regular news pages of the paper, free-advertising-oriented publications produced by newspapers for nonsubscribing households, nongrocery coupons, and advertising printed on plastic bags that cover home-delivered newspapers.

ROP Reading and Related Attitudes

This report has shown that a majority of consumers actively look for advertising and shopping information on at least a weekly basis and that newspapers are their primary destination. Preprints most easily illustrate these behaviors and attitudes, but what about the other major format for newspaper-printed advertising: run-of-paper (ROP)?

Reading Experience: ROP ads provide a very different experience than preprints because they are integrated into the news and feature pages of the newspaper. Preprints are a particular section of the newspaper and so command, more or less, exclusive attention when reading. ROP ads are integrated into every section, causing readers' eyes to move rapidly back and forth between stories and ads as they scan a page. Because of this difference in format, we would expect less variability in reading ROP advertising among different types of newspaper readers than is the case for preprints.

ROP Readership: Two-thirds of all adults said they normally read or glance at ROP ads when paging through newspapers. Another 19 percent said they look at this advertising only when they are planning to shop for something. Only 15 percent of adults said they never look at ROP advertising. (Among newspaper readers only, we have 68 percent usually read, 19 percent read only when in the market for something and 11 percent who never read.) These results replicate a finding of the recent NAA study, "How America Shops and Spends 2006."

QUESTION: WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU PAGE THROUGH A NEWSPAPER?

Ways of Paging Through a Newspaper

Read advertising (net)	86%
Read or glance at advertising when paging through newspaper	68
Look at advertising only when planning to shop	19
Only look at stories & never look at advertising	11
Other	2

Base = Newspaper Readers

Who is most likely to read ROP ads? The patterns are less distinct than is the case for preprints, which illustrates the nature of this form of advertising.

- Women (67 percent) lead men (58 percent) in regular ROP reading, while Hispanics (73 percent) are above average and those with \$100,000+ incomes (54 percent) are below average. Otherwise, we find little variation among demographic groups.
- Interestingly, respondents who get the Sunday paper more for news (65 percent) are only slightly behind those who get the paper mainly for advertising (70 percent) in ROP readership. Similarly, subscribers, single-copy buyers and pass-along readers are within five points of each other on this indicator.
- Another dimension that impacts ROP readership is openness to advertising. Some people are simply more interested in the subject. Newspaper preprint readers are more likely than other consumers to look at ROP ads as well. The propensity to read ROP ads on a regular basis increases with the frequency of preprint readership, ranging from 46 percent of “infrequent” preprint readers, to 61 percent of “occasional” preprint readers, to 75 percent of “regular” preprint readers. Consumers who are active coupon savers (72 percent) also are more interested in ROP ads.

ROP Attractions: In general, readers are interested in price information and savings opportunities especially for things they have began thinking of buying. Respondents rated the seven circumstances that could increase the odds of their reading particular ROP ads, and the results are summarized in the table below.

- Being in the market for the item advertised is the strongest factor at 81 percent.
- Three price-related items, most especially whether the ad shows item prices (with or without a sale), measure at 51 percent agreement. Having a notice of a sale or special savings measured at 58 percent and having coupons for something “you” came in at 70 percent.
- Items regarding color ads (56 percent), being larger than other ads (41 percent) and proximity to a story “you” are reading (37 percent) also are significant.

QUESTION: SOMETIMES DIFFERENT THINGS INFLUENCE WHETHER YOU WILL READ OR LOOK AT AN ADVERTISEMENT PRINTED IN THE REGULAR SECTIONS OF THE NEWSPAPER. PLEASE TELL ME WHETHER EACH OF THE FOLLOWING MAKES IT MUCH MORE LIKELY YOU WILL READ OR LOOK AT THE AD, OR SOMEWHAT MORE LIKELY, OR NOT MORE LIKELY THAN YOU WOULD OTHERWISE.

What Increases Odds of Reading ROP Ads

Happen to be in the market for item that is advertised	81%
Ad has coupons for something you are interested in	70
There is a notice of a sale or special savings	58
Ad is shown in color	56
Ad shows prices of items, whether or not they are on sale	51
Ad is larger than other ads on page	41
Ad is next to story you are reading	37

Base = Adults who ever read or look at advertising printed in regular sections of newspaper

Response patterns for each item are noted below.

- **Ad shows items the reader is in the market for:** Significantly, there is no meaningful variation by demographic group on this item, which illustrates the power of intentionality in advertising. Most people who are in the market pay more attention.
- **Ad has coupons for something the reader is interested in:** We should note the qualifier on this item, which refers not just to coupons, but to coupons for an attractive product. The draw of such coupons is strong for both genders, although women (78 percent) lead men (61 percent). Minority adults also are high on this item (77 percent). High-income adults are below average on this question but only by a few percentage points.
- **Ad has a notice of a sale or special savings:** Women (66 percent) again lead men (49 percent) substantially, while minority and low-income adults also are around 66 percent. High-income consumers are significantly lower, but 49 percent remain positive on this item.
- **Ad is in color:** Women (60 percent) and minority adults (67 percent) are above average in being drawn to color. The appeal of color is highest among those age 18-to-24 (65 percent), and then declines with each age group to 46 percent for adults age 65-plus adults. Consumers expect color, as magazines, television and Internet all are near 100-percent color.
- **Ad shows prices of items, whether or not they are on sale:** Interest in this characteristic is general and does not vary markedly among target groups.
- **Ad is larger than other ads on the page:** This factor applies to most groups about equally, but renters (50 percent) and African Americans (54 percent) are above average.
- **Ad is next to a story being read:** Another factor that operates for all groups.

TMC/Shopper Vehicles

Many newspapers have TMC, or “total market coverage” publications that typically are delivered or mailed to households that do not subscribe. They may or may not be branded closely to the main newspaper, but they usually carry a selection of preprints that also are in the daily newspaper. Identifying TMC readers in a survey is difficult because of the variety of direct mail items that most people receive. The survey question therefore focused on the preprints that are common with the main newspaper in town, as well as the manner of delivery.

Six in 10 American adults say they have received these “shopper” publications, with 42 percent citing in the past seven days and 52 percent citing in the past 30 days. Above-average groups for the past 7 days include:

- Single-copy weekday newspaper buyers (52 percent)
- Sunday-only subscribers (49 percent)
- Single-copy Sunday newspaper buyers (47 percent)
- Midwest census region (49 percent)

QUESTION: DOES YOUR HOUSEHOLD EVER RECEIVE ANY FREE NEWSPAPER PUBLICATIONS THAT PRIMARILY CONTAIN ADVERTISING, INCLUDING STORE CIRCULARS THAT ALSO COME IN THE REGULAR LOCAL NEWSPAPER. THESE FREE NEWSPAPERS MAY COME IN THE MAIL OR ELSE WOULD BE LEFT IN FRONT OF YOUR HOUSE. **QUESTION:** WHEN WAS THE LAST TIME YOU RECEIVED ONE OF THESE FREE ADVERTISING PUBLICATIONS AT YOUR HOME?

When Last Received Free Newspaper Advertising Publications

Yes, have received	62%
Within the past 7 days	42
Longer than 7 days ago but less than 30 days ago	10
More than 30 days ago	8
Don't know	1
Don't receive free publication	38

Base = Total

Shopper Readership: Among adults who receive these shoppers, three quarters said they look at some or all of the advertising or inserts, while the others (26 percent) throw it out without looking at any of the advertising or inserts. (This yields an estimate of 45 percent of all adults who pick up and look at the publication.)

A majority of those who look at shopper advertising (51 percent of recipients) look only at ads for products or stores of interest. About one-fourth said they look at all of the advertising or inserts.

- Frequent preprint readers (82 percent) are more likely to look at shoppers they receive, as are those who get Sunday newspapers mainly for ads (83 percent).
- Low-income recipients are also more likely to look at shoppers they receive (82 percent up to \$49,000 income), but the usage rate decreases significantly for higher incomes.
- Looking at the census regions, Midwestern adults are the most likely to open shoppers (79 percent), as well as the most likely to receive them.

QUESTION: WHEN YOU RECEIVE ONE OF THESE ADVERTISING PUBLICATIONS, WHAT DO YOU USUALLY DO WITH IT?

Typical Response to Free Newspaper Advertising Publications

Look at some or all advertising (net)	73%
Read or look at some of the advertising or inserts, depending on products or stores advertised	50
Read or look at all of the advertising or inserts that it contains	23
Throw it away without reading or looking at any of the advertising or inserts that it contains	26
Don't know/Refused	1

Base = Adults who ever receive free newspaper publications

Nongrocery Coupons

Nearly half of American adults collect nongrocery coupons regularly or occasionally, with 1 in 5 doing so on a regular basis. In total, nearly three-fourths of adults ever save coupons for items other than groceries.

- Coupon collecting is about the same for income groups up to the \$99,000 level (around 50 percent). Upper-income adults measure at 36 percent for nongrocery coupons.

QUESTION: HOW OFTEN DO YOU SAVE COUPONS TO BUY OR PURCHASE THINGS OTHER THAN GROCERIES OR FOOD PRODUCTS? WOULD YOU SAY ...?

Saving Nongrocery Coupons

Regularly/Occasionally (net)	47%
Regularly	19
Occasionally	28
Seldom/Never (net)	52
Seldom	26
Never	26
Don't know/Refused	1

Base = Total

- Minority adults are more likely to save nongrocery coupons regularly or occasionally (61 percent of African Americans, 56 percent of Hispanics), as are primary shoppers in the household (54 percent). Women (57 percent) are far more likely than men (38 percent) to save coupons regularly or occasionally.
- Looking at the results by Census region, Northeastern adults (53 percent) are more likely to save nongrocery coupons regularly or occasionally while Western adults (43 percent) are less likely to do so.
- Single-copy buyers and subscribers are both about the same in their nongrocery coupon collecting at about 55 percent (regularly or occasionally).
- Even pass-along readers collect coupons in substantial numbers. Four in 10 Sunday pass-along readers, and 45 percent of weekday pass-along readers, save nongrocery coupons regularly or occasionally.
- The odds of collecting coupons increase with the frequency of preprint readership. More than six in 10 adults who read preprints regularly save nongrocery coupons regularly or occasionally, while 40 percent of those who read preprints occasionally, and 22 percent of those who seldom read preprints, do so.

Preference for Receiving Coupons: Direct mail as a preferred delivery medium for coupons is still a distant second to newspapers, by a nearly three-to-one margin.

QUESTION: FROM WHICH ONE OF THESE SOURCES I NAME DO YOU PREFER TO RECEIVE COUPONS?

Preferred Source for Receiving Coupons

Newspapers (net)	65%
Sunday newspaper inserts or circulars	54
Weekday newspaper inserts or circulars	8
Ads in regular pages of newspaper	3
Other media (net)	30
Direct mail	23
Internet	4
Magazines	3
None/No preference Don't know/Refused	5

Base = Adults who ever use coupons

Two-thirds of American coupon users prefer to receive coupons in newspapers. The 65 percent includes 54 percent who prefer Sunday preprints, 8 percent who prefer weekday newspapers and 3 percent who mentioned ads in the regular pages of the newspaper. Sunday preprints, however, are still by far the most widely preferred delivery medium.

Plastic Bag Advertising Awareness and Readership

A majority of subscribers (54 percent) notice advertising on plastic delivery bags. Among those who notice, one-half (50 percent) usually read the advertising.

QUESTION: IS YOUR NEWSPAPER EVER DELIVERED IN A PLASTIC BAG? [IF SO:] HAVE YOU EVER SEEN OR NOTICED ANY ADVERTISING PRINTED ON THE PLASTIC BAG IN WHICH THE PAPER WAS DELIVERED?

Plastic Delivery Bag Advertising

Yes, have seen or noticed advertising on plastic bag	54%
No, have not seen or noticed advertising on plastic bag	42
Paper not delivered in plastic bag	3
Don't know	<0.5

Base = Adults who subscribe for Sunday or weekday home delivery

QUESTION: PLEASE THINK ABOUT THE TIMES THAT YOU HAVE SEEN ADVERTISING PRINTED ON THE NEWSPAPER DELIVERY BAG. DO YOU USUALLY READ THE ADVERTISING PRINTED ON THE BAG, OR NOT?

Readership of Plastic Delivery Bag Advertising

Total	50%
No, do not usually read advertising on plastic bag	48
Don't know	2

Base = Adults who noticed advertising printed on plastic delivery bag, N=857

7. Internet Shopping & Advertising

This chapter considers the role of the Internet in shopping and consumer interest in several forms of online advertising.

Access

A limiting factor for Internet shopping is having access. Presently, around three-fourths of American adults say they have Internet access either at home, work, school or elsewhere. This is a national average, however, and large markets still can be 25 points higher than some smaller markets around the country.

Further, various national and local market studies by MORI and others indicate that the rate of access growth has been very slow in recent years.

QUESTION: DO YOU USE AN ONLINE SERVICE OR HAVE INTERNET ACCESS, EITHER AT HOME, AT WORK, OR SOMEPLACE ELSE?

Internet Access 2006

Total	76%
Men	79
Women	73
18-54	87
55-64	75
65+	46
Less than \$35,000	54
\$35K to \$49K	75
\$50K to \$74K	87
\$75K+	93
Hispanics (English-Speaking)	76
African Americans	67

Base = Total and subgroups

Online Shopping Activities

Online shopping is widespread among Internet users, as 72 percent engaged in at least one of the following activities in the past 30 days:

- Percentage of Internet users purchased something online in the past 30 days: 52
- Percentage who obtained shopping or product information for online purchases: 55
- Percentage who obtained shopping or product information for purchases at regular stores, or “offline:” 51
- Percentage of Internet users who obtained coupons online: 22. This includes 17 percent for use at regular stores, and 14 percent for online purchases.

Online Shopping by Total Adults: Online shoppers obviously are a very large audience, but it should be remembered that many adults do not use that channel. Converting the above numbers to percentages to include all adults yields the following:

- Fifty-four percent of all adults engaged in some form of online shopping in the past 30 days.
- Thirty-nine percent of all adults purchased something online in the past 30 days.
- Forty-two percent of all adults used the Internet to inform their online purchases.
- Thirty-nine percent of all adults used the Internet to support offline purchases.
- Sixteen percent of all adults obtained online coupons, including 13 percent for discounts at regular stores and 10 percent for online purchases.

Online vs. Offline Purchasing: Slightly more consumers use the Internet to support online purchasing rather than for purchasing at regular stores. This also illustrates the continuing importance of traditional, or offline, advertising channels, since the dollar volume for consumer offline buying is far larger than for online commerce.

Who shops online? Online shoppers tend to be the kinds of people who are generally active online. Newspaper Web site users especially stand out.

- The likelihood of online shopping in the past 30 days increases with each increment of household income and level of education. (This relationship, however, mostly disappears regarding online coupons.)
- Men and women are equally likely to look online for information to aid shopping at brick-and-mortar stores, but men are slightly more likely to buy online (54 percent for men vs. 49 percent for women). Women are more likely to get coupons online for offline shopping (21 percent for women vs. 14 percent for men). Women age 18-to-34 are the strongest demographic group for coupons.
- Young adults also are above average in shopping online, but shoppers age 18-to-24 and 25-to-34 differ in where they buy. The 25-34 age group is considerably more likely to buy online than is the case for 18-to-24-year-olds, but the two groups are the same in shopping online to support buying at regular stores. The 25-to-34-year-old group's average income is \$61,000 and is \$10,000 higher than for 18-24s, which likely explains the shopping difference.
- Residents of the Midwest census region trailed the other regions by five to 10 points on online shopping and purchasing and their satisfaction with online shopping (discussed elsewhere); they were about average, however, in obtaining online coupons.
- Newspaper Web site visitors are far above the average on each of the online shopping indicators discussed here. Another recent NAA report, "Power Users 2006," discusses this characteristic of the newspaper Web site audience in more detail. In the current study, 89 percent of past 30-day newspaper site visitors shopped online, compared with 72 percent for all Internet users, and only 63 percent of Internet users did not visit a newspaper Web site in the previous 30 days.

Online Shopping for Brick and Mortar Stores

Online shoppers looking to buy at "regular" stores are most likely to compare product features and prices online, but many also look for other types of relevant information.

- The top two items are forms of comparison-shopping—comparing product features (77 percent) and comparing prices between stores (76 percent).
- Next, at around two-thirds, online shoppers are checking for a product's availability and checking store hours, location or telephone number.

QUESTION: FOR WHICH OF THE FOLLOWING TYPES OF INFORMATION DID YOU USE THE INTERNET?

Shopping/Product Information Sought Online for Purchases At Regular Stores

Comparing features of different products	77%
Comparing prices between stores	76
Checking product availability	66
Checking store hours, phone number or location	62
Reading reviews or experiences of other shoppers	51
Don't know/Refused	2

Base = Adults who used Internet for shopping information or coupons in past 30 days for purchases at regular stores

- **Reviews:** Last on this list, but very interesting, is reading reviews contributed by other shoppers, noted by half of respondents. Evidence from other surveys, such as the Power User studies from the NAA New Media Federation, suggests that interest in this form of interactive content has grown substantially in the past two years and merits attention from the newspaper industry. Online consumer reviews are another form of word-of-mouth, which is a powerful form of advertising that some marketers are now trying to facilitate with “guerrilla marketing” tactics.
- Men are well ahead of women in comparing product features (84 percent vs. 70 percent) or reading product reviews (57 percent vs. 43 percent), but are only slightly more likely than women to compare prices online (80 percent vs. 72 percent). Men and women do not vary in levels of checking online for product availability or store information.
- Hispanic respondents (87 percent) also are above average in comparing store prices online.
- Newspaper Web site visitors are above the average in looking online for store hours and locations (68 percent), and in reading product-and-shopping-experience reviews (58 percent).

Online Shopping Navigation: Shoppers use several techniques for moving to and from online shopping sites.

- By far, the predominant modes of navigation: Search engines (used by 86 percent), and typing Web site addresses into the browser (79 percent) predominate. Many people use the search engine as a substitute for typing in the full name of the Web site on the address line, but we could not address that distinction in this study.
- Almost half of online shoppers mentioned keeping shopping sites on their favorites list. More than one-third (36 percent) said they typically follow links, either from online advertisements (26 percent) or from news Web sites (23 percent).

QUESTION: WHEN YOU USE THE INTERNET TO FIND SHOPPING OR PRODUCT INFORMATION, IN WHICH OF THE FOLLOWING WAYS DO YOU REGULARLY GET TO THAT INFORMATION?

Ways of Finding Shopping or Product Information Online

Use search engine	86%
Type in Web site address	79
Find Web site on your favorites list	46
Link to shopping Web site from online advertisement	26
Link to shopping Web site from news Web sites	23
Some other way	4

Base = Adults who shopped online in past 30 days

Following are types of online shoppers who are above average in using the indicated modes of navigation for online shopping.

- Typing in Web site address: Age 18-34
- Using favorites list: Age 55+
- Link to shopping Web site from advertisements: Southern census region, renters, African Americans, Hispanics and coupon users.
- Link to shopping Web site from news sites: Northeast census region, renters, African Americans, Hispanics, coupon users and newspaper Web site visitors.

The Online Shopping Experience

In One Word: We can expect the incidence of online shopping to continue to increase as more people become used to it. The experience is mostly good or at least satisfactory among 85 percent of respondents who were told to use one word to describe their experience.

- The most cited descriptors were convenient or quick (33 percent) and easy or simple (also 33 percent). One in five online shoppers was a bit-less positive, describing it merely as satisfactory, good, or adequate (22 percent).
- Ten percent of shoppers used negative descriptors, including “confusing” and “time consuming.”

QUESTION: STILL THINKING ABOUT THE LAST/MOST RECENT TIME THAT YOU SHOPPED OR PURCHASED SOMETHING ONLINE, HOW WOULD YOU DESCRIBE THE EXPERIENCE?

Online Shopping Experience in a Word

Positive experience (net)	85%
Convenient, quick	33
Easy, simple	33
Satisfactory, good, adequate	22
Excellent, great	13
Cheaper, bargain price	6
Different, exciting, interesting	3
Negative experience (net)	10
Bad, dull, confusing	6
Time consuming	4
Other (net)	5
Cautious, taking a chance	2
Other	3
Don't know/Refused	1

Base = Adults who shopped online in past 30 days, partial sample (one-third of those eligible)

- Residents of the Midwest census region were somewhat less enthusiastic about online shopping, as 76 percent described it positively, particularly on the dimension of convenience. Western region shoppers were most likely to describe the process as easy and providing bargain prices.
- Low-income (< \$35,000) shoppers also were below average in describing the experience positively (74 percent), while those from \$100,000+ households were the most positive at 92 percent.

Would do it again? Another indicator of satisfaction is whether consumers would use the same shopping channel the next time, and the response was positive. Online shoppers were asked to think about the last time they had shopped or purchased using the Internet and to rate their likelihood of going online for the same item again. Four in ten said they definitely would, and another 32 percent said they probably would.

- Responses were most positive among upper-income adults, men, Western census region residents and the 25-to-54 age group.
- Somewhat surprisingly, the age 18-to-24 group was well below average, with only 52 percent saying they definitely or probably would shop for the same item again online. This group also has the lowest average income by far, which may be driving their response.

QUESTION: THINKING ABOUT THE LAST/MOST RECENT TIME THAT YOU SHOPPED OR PURCHASED SOMETHING ONLINE, HOW LIKELY WOULD YOU BE TO SHOP OR PURCHASE THAT ITEM ONLINE AGAIN?

Likelihood of Purchasing Item Again Online

Will (net)	74%
Definitely will	42
Probably will	32
May or may not	15
Will not (net)	9
Probably will not	5
Definitely will not	4
Don't know/Refused	1

Base = Adults who shopped online in past 30 days

Items Would Purchase Online: Online shoppers are open to purchasing a variety of products online, but interest varies considerably depending on the item.

- At least half of shoppers would buy personal computer hardware or software, home electronics, clothing or shoes, office supplies or sporting goods by this channel.
- At the bottom end, with less than one-third expressing interest, are pharmaceuticals, major appliances, building or remodeling supplies, prepared food and groceries.
- Women and men vary considerably in their interest, depending on the product involved, as shown in the table on page 37.
- We also find regional variations on some items:
 - The Western and Southern census regions (48 percent) lead the Northeast and Midwest (37 percent) regarding financial services.
 - The South (70 percent) is far ahead of the Midwest (54 percent) for clothes and shoes.
 - The Midwest (31 percent) also trails other regions by around 10 points for health and beauty aids.
 - The West (79 percent) leads other regions by around 10 points on personal computer hardware and software.
- Past 30-day users of newspaper Web sites average five points higher than average on each item except for groceries and furniture, where they match the average.

QUESTION: PLEASE TELL ME WHETHER YOU WOULD CONSIDER PURCHASING THE FOLLOWING PRODUCTS OR SERVICES ONLINE.

Would Consider Purchasing Product or Service Online

	Internet Shoppers	Men	Women
Personal computer hardware or software	73%	79%	66%
Home electronics	65	74	56
Clothing or shoes for men, women or children	64	53	75
Office supplies	56	60	53
Sporting goods	50	58	41
Banking, insurance or financial products or services	44	47	39
Automotive parts or accessories	39	48	28
Health & beauty aids	38	28	49
Furniture or home furnishings	33	26	40
Prescription or non-prescription drugs or medicines	29	31	28
Major home appliances	29	34	24
Building or home remodeling products or supplies	26	27	25
Prepared food, for delivery or carry out	20	18	22
Groceries	13	10	16

Base = Adults who shopped online in past 30 days; partial sample (bases vary by store category)

Newspaper Web Sites and Shopping Information

One-third of Internet users (32 percent) and 24 percent of all adults visited a newspaper Web site in the previous 30 days

Newspaper Web site visitors on average do more things online, including shopping, than is the case with other Internet users. This is amply documented in the recent “Power Users 2006” report from NAA. For example, among past-30-day, newspaper-site visitors, 55 percent have seen or used online preprint advertising, compared with only 42 percent of other Internet shoppers.

Why do users visit newspaper Web sites? Almost two-thirds of past 30-day visitors mentioned various types of advertising information, including 30 percent citing retail shopping information in particular. This proportion spikes up to 39 percent among the 25-to-34 age group.

QUESTION: THINKING OF ALL THE REASONS YOU HAVE VISITED THE NEWSPAPER'S WEB SITE, FOR WHAT TYPES OF INFORMATION OR SERVICES HAVE YOU LOOKED AT OR USED THE SITE? (AIDED)

Reasons Visited Newspaper Web site

News (net)	88%
Local or regional news	80
National news	66
Advertising (net)	62
Shopping information for retail stores	30
Homes or real estate search	29
Job hunting information	28
Shopping for cars or trucks	19
Weather	57
Movie listings or other entertainment information	46
Sports scores & information	42
Stocks or stock market	21
None of these	2

Base = Adults who visited newspaper Web site in past 30 days

Online Inserts

Newspaper advertising preprints provide many advantages that shoppers readily understand, as reviewed elsewhere in this report. Can the preprint experience be transferred satisfactorily online? We could not explore this question in detail, but consumer response is more negative than positive.

Product Appearance: Earlier, it was noted that 53 percent of newspaper preprint users agreed that they give a good idea of what products look like. The Internet, however, seems to have an advantage over preprints on this characteristic, although there obviously is much room for variation. By a 62 percent to 25 percent margin, online shoppers said that they get a better sense of product appearance on the screen than with a printed insert. Women (55 percent) are somewhat less inclined than men (62 percent) to favor the Internet on this question. (Newspaper preprint users who shop online are about average on this question.)

QUESTION: IN GENERAL, WOULD YOU SAY THAT YOU GET A BETTER IDEA OF A PRODUCT'S APPEARANCE BY SEEING IT IN A PRINTED ADVERTISEMENT IN A NEWSPAPER INSERT, OR BY SEEING IT ONLINE, ON A WEB SITE?

Product Appearance in Printed Insert vs. Online

Better seeing product online	62%
Better seeing product in print advertisement	25
About the same	11
Neither	2
Don't know	1

Base = Adults who shopped online in past 30 days

Awareness of Online Inserts: Almost half of online shoppers said that they have seen or checked online versions of newspaper advertising inserts that are available at some store Web sites. Young adults, especially women age 18-34 (57 percent), are more likely to have seen online preprints. Awareness also is higher in the Northeast (52 percent) than the Western (42 percent) census regions.

QUESTION: SOME COMPANIES WHO ADVERTISE IN NEWSPAPER INSERTS MAKE THE SAME INFORMATION AVAILABLE ONLINE. THAT IS, YOU MIGHT GO TO A STORE'S WEB SITE, ENTER YOUR ZIP CODE, AND SEE PICTURES OF THE SAME INSERT THAT APPEARED IN YOUR LOCAL NEWSPAPER. HAVE YOU EVER SEEN OR USED A FEATURE LIKE THIS ON ANY STORE'S WEB SITE?

Aware that Inserts Are Available Online

Yes, have seen or used this type of feature online	47%
No, have not seen or used this type of feature online	52
Don't know	1

Base = Adults who shopped online in past 30 days

Online vs. Printed Inserts: Newspaper Web site visitors were asked whether they would prefer conventional printed inserts or electronic versions at newspaper Web sites. They favor the printed versions of inserts by a two-to-one margin (60 percent vs. 33 percent). The margin is greater among female visitors of newspaper sites (65 percent vs. 29 percent), although young adults divide about equally between the two.

Site visitors who think that products are better displayed in print overwhelmingly prefer printed inserts (82 percent vs. 15 percent). Those who think that online portrays product appearance better are split, with almost one-half favoring either medium.

QUESTION: SUPPOSE THAT YOU COULD ACCESS AT THE NEWSPAPER'S WEB SITE ALL THE STORE, COUPON AND SALES INFORMATION THAT YOU NOW RECEIVE IN THE PRINTED NEWSPAPER INSERTS. IN THAT CASE, WHICH WOULD YOU USE MOST OF THE TIME?

Printed Newspaper Inserts vs. Online Shopping Information

Printed version	60%
Online version	33
Other	7

Base = Adults who visited newspaper Web site in past 30 day

8. Appendix: Technical Notes

The Newspaper Association of America contracted MORI Research, Minneapolis, to conduct the research described in this report.

This study is based on a national telephone survey conducted from March 20, to April 15, 2006. The survey included 3,008 randomly-selected respondents in the 48 contiguous states.

The sample was balanced to match the population distributions of the four Census regions (Northeast, South, Midwest, and West). The telephone sample was RDD in format and was purchased from Survey Sampling, Inc. Interviews averaged 26 minutes in length and, where necessary, involved multiple attempts over several weeks to reach respondents selected for the survey.

For the total sample of 3,000 respondents, normal error, or variance, due to sampling fluctuations is approximately 1.8 percentage points at the 95-percent confidence level. Sampling error is larger for subgroups, and it should be remembered that survey research always is subject to other forms of measurement error, or variance, as well.

The data set was weighted by number of adults in the household, and then post-stratification weights were calculated simultaneously for age by gender categories, race (white, African American, and other), and Hispanic ethnicity. An additional weighting step adjusted for a small bias created by the length of the questionnaire and concentration on newspaper advertising. Analysis showed that respondents who dropped out checked advertising less frequently than was the case for respondents who completed the interview.

In order to facilitate analysis, missing responses on demographic questions were ascribed, or estimated, using multivariate methods commonly used in media research



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