

Colorado Media Project Detailed Survey Analysis

SEPTEMBER 2018

Agenda

Survey parameters

Key insights

- Target segment demographics
- Local information interest
- Format/topic preferences
- Willingness to pay

Compendium

Survey parameters

Survey designed to understand how Coloradans' media consumption habits and areas of opportunity

Primary areas of questioning in the survey



News interest and motivations

Do Coloradans want local (neighborhood, city, state) news? If so, which types? For what reasons do residents consume news? How satisfied are Coloradans' with current options?



Format and topic preferences

How do Coloradans consume news by topic, format, and frequency? Through what mediums do they discover and consume news? How do awareness and consumption differ across groups?



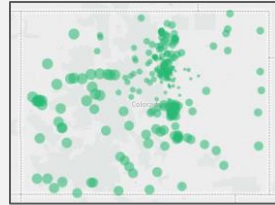
Willingness to pay

Are Coloradans willing to pay for local news? If so, how much? What drives willingness to pay?

Surveyed Coloradans all across the state



Surveyed **2,014** Coloradans



From **279** unique zip codes



Aged between **18-75** years old



Respondent demographics consistent with gender, income and education demographics representative of Colorado

Survey demographics match demographics of Colorado

M/F - All	Count (weighted)	%	Target
Female	1001	53%	51%
Male	972	47%	49%

Education - All	Count (weighted)	%	Target
Some high school	25	1%	1%
High school grad or equiv.	213	11%	10%
Some vocational/technical school	29	1%	1%
Vocational/technical school	73	4%	4%
Some college, no degree	397	20%	19%
College graduate	828	42%	44%
Master's or prof. degree	405	21%	21%
Other	3	0%	0%

Ethnicity - All	Count (weighted)	%	Target
White or Caucasian	1694	85%	86%
Black or African American	73	5%	4%
Asian American	58	3%	3%
Alaskan Native, Native Hawaiian or other Pacific Islander	21	1%	1%
Other	126	5%	6%

Family status	Count (weighted)	%	Target
Households with children	681	35%	41%
Households without children	1291	65%	59%

Age - All	Count (weighted)	%	Target
18-24	225	10%	11%
25-34	401	21%	20%
35-44	379	17%	19%
45-54	379	18%	19%
55-64	357	20%	18%
65+	232	14%	12%

Income - All	Count (weighted)	%	Target
Under \$25,000	253	13%	13%
\$25,000 - \$49,999	385	19%	20%
\$50,000 - \$74,999	368	19%	19%
\$75,000 - \$99,999	303	16%	15%
\$100,000 - \$149,999	362	18%	18%
\$150,000+	302	15%	15%

Ethnicity - All	Count (weighted)	%	Target
Yes, Hispanic or Latino origin	356	16%	18%
No	1616	84%	82%

Key insights

Key insights

Addressable market ~2.4M, interested in local news, motivated by impact and discovery in community

Themes	Question to answer	Key insights around target segment	
Target Segment	What users are interested in local news, digitally savvy, willing to pay for news and typically read longer news content?	1	Target market (addressable market willing to pay) is 18% of population or ~1M Coloradans
		2	Target segment primarily female (55%), married (68%) and highly educated (69%) 47% more likely to be Hispanic, 21% more likely to have a higher income, and 37% more likely to identify as a Democrat than non-target segment
Local news interest	Do Coloradans want local (neighborhood, city, state) news? If so, which types?	3	Target segment believes local and state government has a slightly stronger influence on their life and they have a strong affiliation to CO over national
		4	Target segment has higher average awareness (37%) of Colorado news outlets and is 20%+ more likely to consume a local outlet
		5	Motivated to consume news to learn about things that impact their life (74%) and to discover things in their community (67%)
Format & topic preferences	If Coloradans want local news what should that platform look like (format, topics, frequency, etc.)?	6	Highest interest in gov't and politics (47%) and lowest interest in celebrities (0%)
		7	Prefers reading news on their mobile several times per day (41%) as their most frequent news consumption method
		8	Identified an ad-free platform (42%) as the attribute most likely to increase their consumption of city/state news
Willingness to pay	Are Coloradans people willing to pay for local news? If so, how much?	9	Pricing (25%), feeling good about contributing to an org. (21%) and topic coverage (19%) are target segments most important willingness to pay drivers
		10	Currently pays for news for exclusive benefits (27%), topic coverage (24%) and because info is relevant to their community (23%)



Key insights

Target segment



Survey used four criteria to define CMP's target market based on CMP's stated goals

CMP's goals for a future news source



Colorado-wide



Digital, scalable solution



Enable scrutiny



Sustainable business model

Criteria for CMP target market



Interested in CO news

Ranks neighborhood, city, or state news as 1st or 2nd for interest in consuming



Digitally savvy

Uses a mobile device or tablet at least one time per day to consume news



Reads more than headlines

Typically reads short summaries, full length, or long form news



Willing to pay

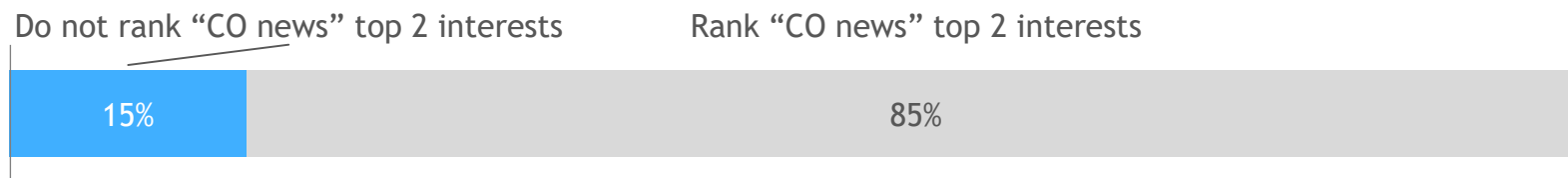
Consumes and pays for at least one news outlet

Also consider those who currently do not pay as part of the addressable market for a non-subscription based model

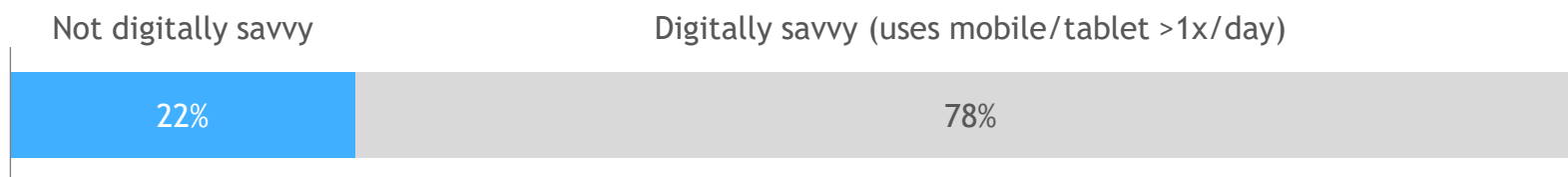


Large proportions of Coloradans meet individual target segment criteria, addressable market must meet all four

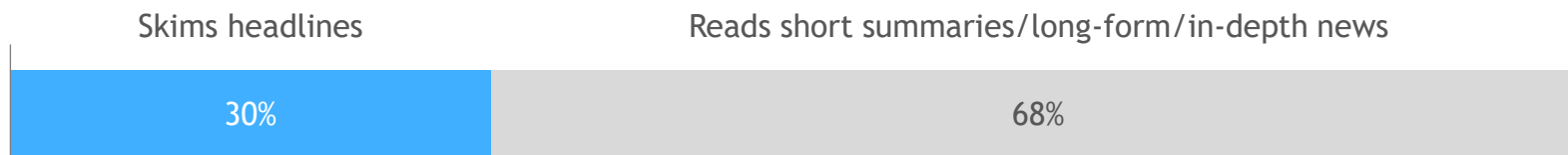
85% of Coloradans rank neighborhood, city or state news in their top two of five news interests



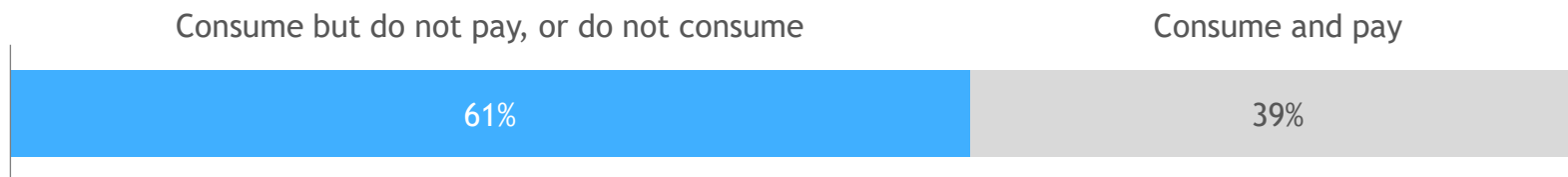
77% of Coloradans are digitally savvy



68% of Coloradans don't skim headlines



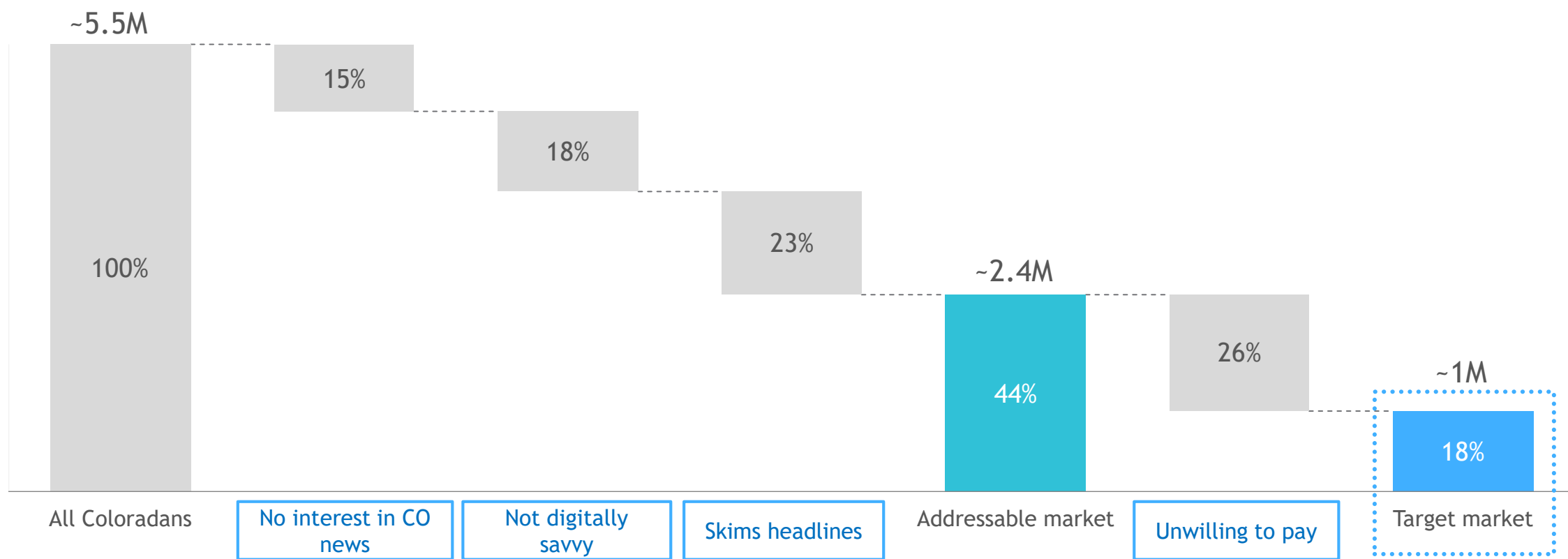
39% of Coloradans are willing to pay for news





Using the criteria, survey identified addressable market of ~2.4M CO residents, & a ~1M target market with willingness to pay

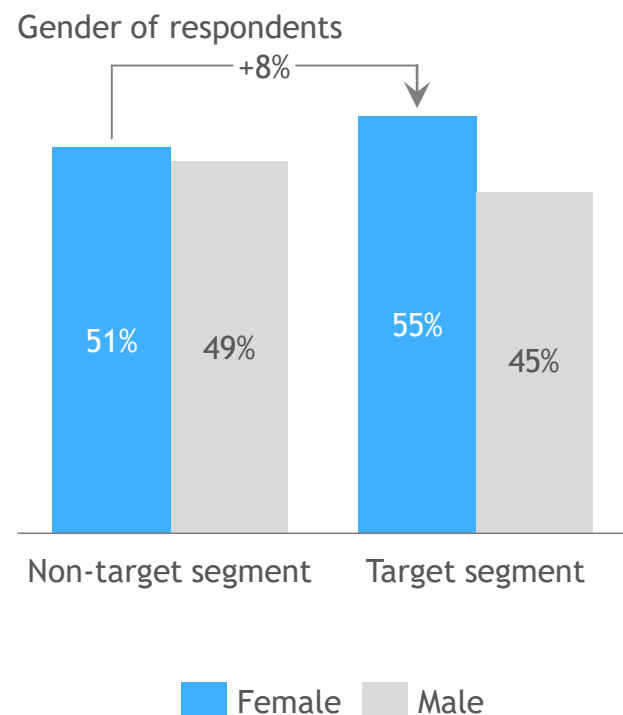
Defining the addressable and target markets from the Colorado population overall



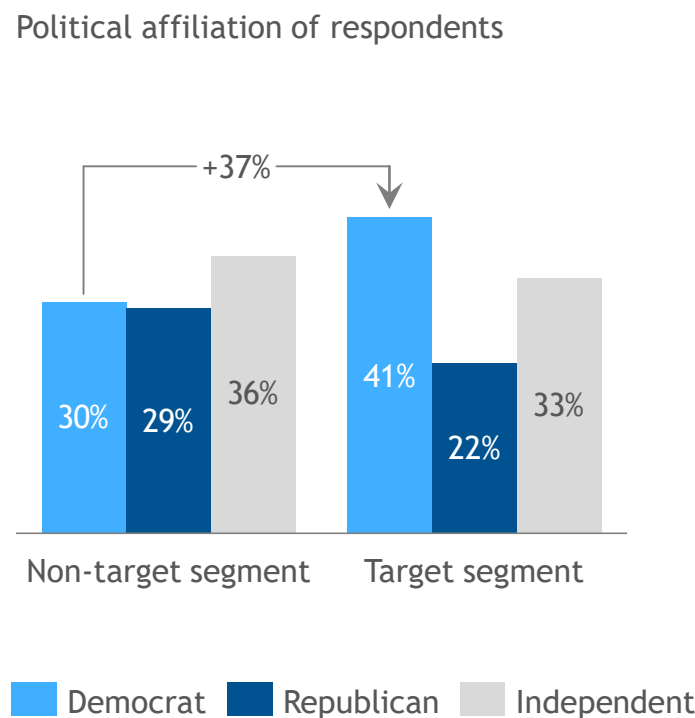


Target segment is more likely to be female (55%), a Democrat (41%) and have a higher income (57%) than non-target segment

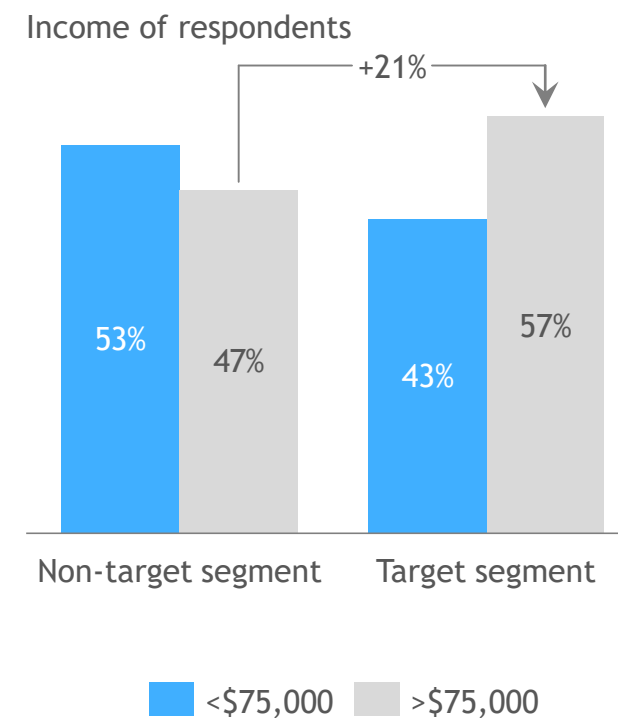
8% more likely to be female



37% more likely to be a Democrat



21% more likely to have income >\$75k

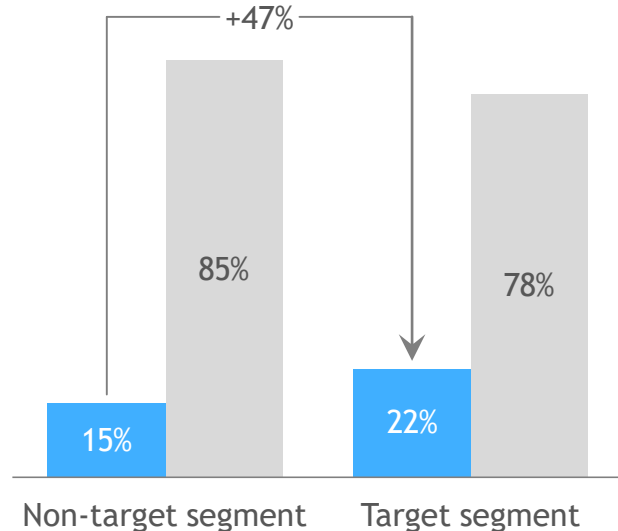




Target segment is also more likely to be Hispanic (22%), married (68%) and more educated (69%) than non-target segment

47% more likely to be Hispanic

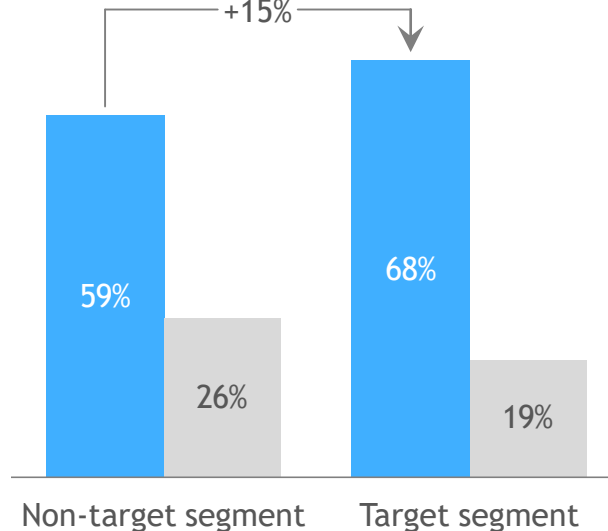
Ethnicity of respondents



■ Hispanic ■ Non-Hispanic

15% more likely to be married

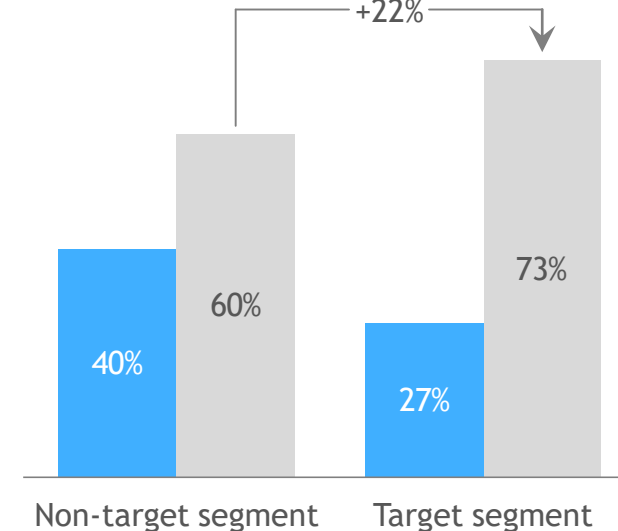
Marital status of respondents



■ Married/civil union ■ Never married

22% more likely to have college or higher degree

Education level of respondents



■ Some college or less
■ College graduate or more



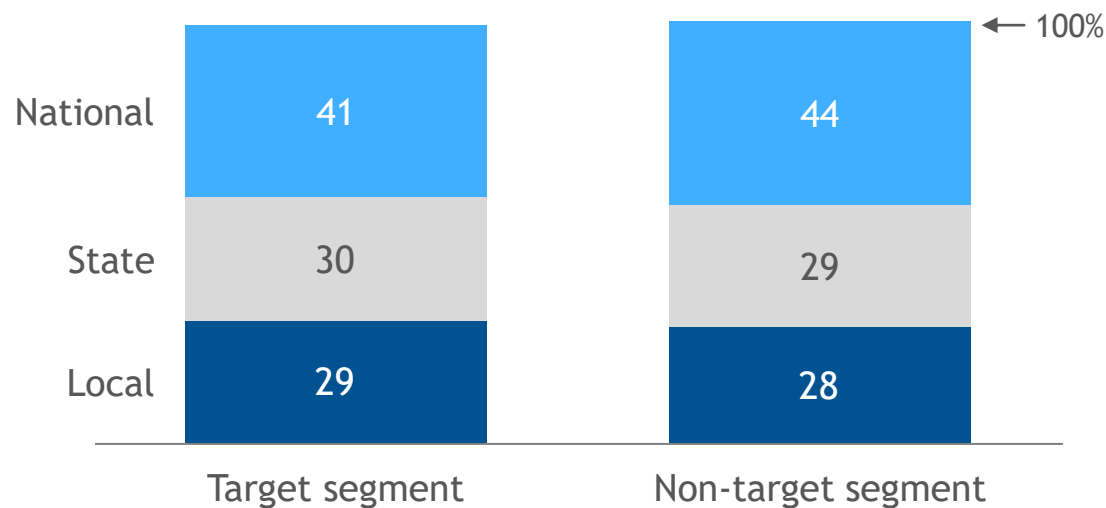
Key insights

Local news interest



Target segment's beliefs about local and state governmental influence consistent with broader population, but they identify more locally than non-target segment

Gov't influence: Target segment's belief that local and state government influence is stronger than national is aligned with Colorado as a whole

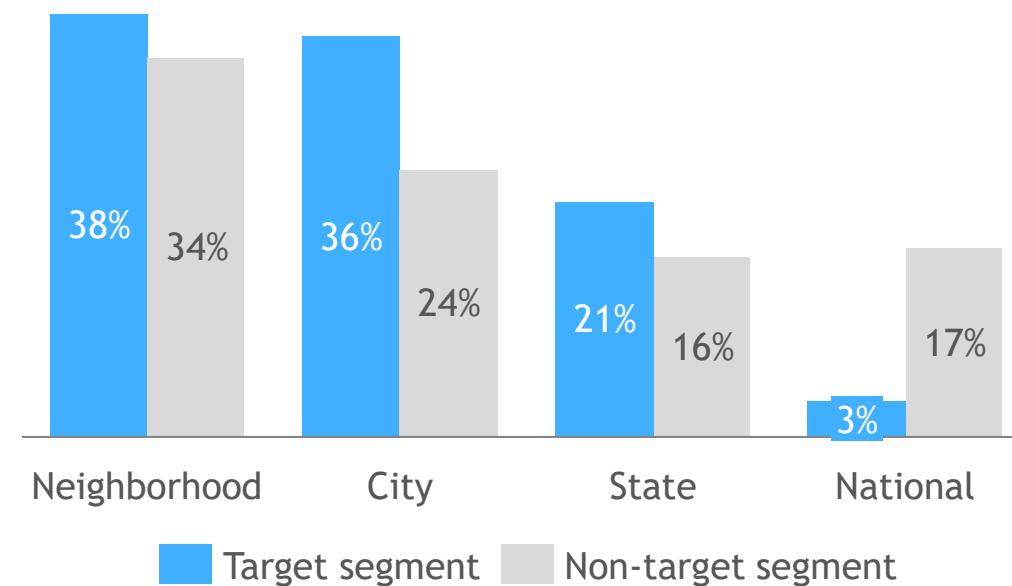


Survey question

Think about the issues that matter most to you. To what extent do you believe that the following levels of government influence the topics you care about?

Affiliation: Target segment has much stronger affiliation to their neighborhood (43%) and city (33%) over national

Target segment ranking #1 affiliation (%)

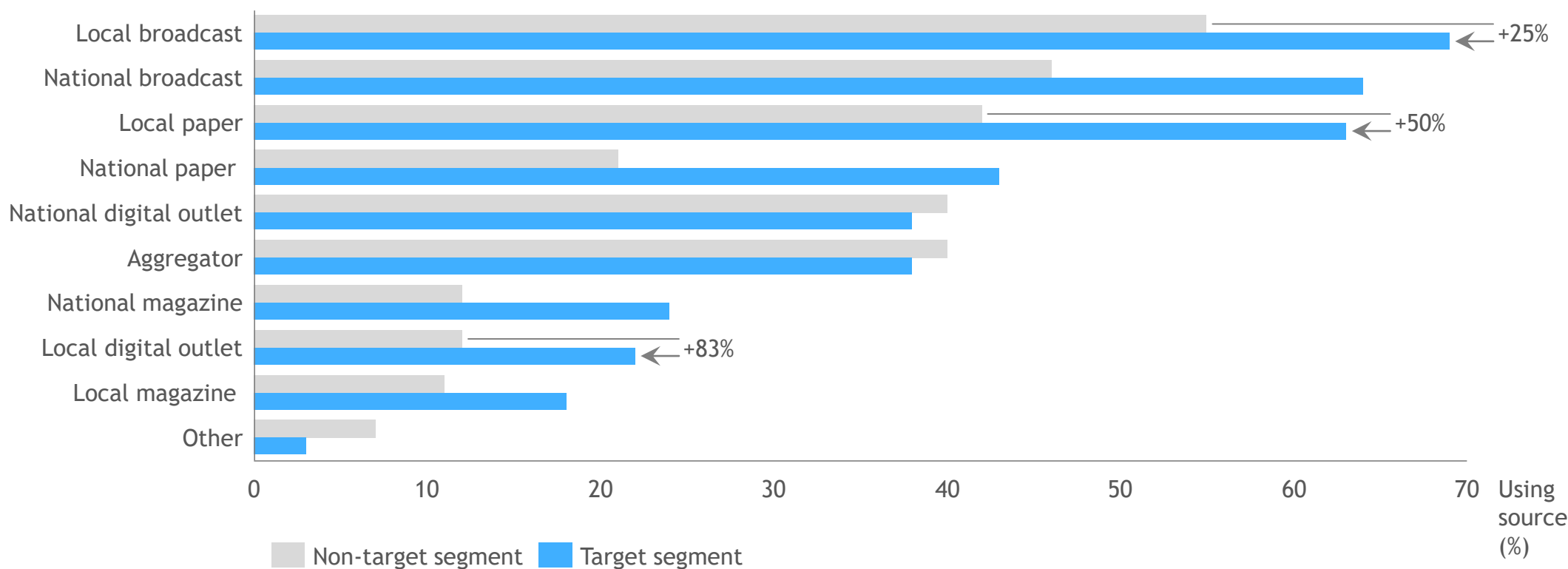


Survey question

Think about the current neighborhood, city, state and country in which you live. Please rank which you have the strongest affiliation to.



Target segment 83% more likely to consume a local digital outlet

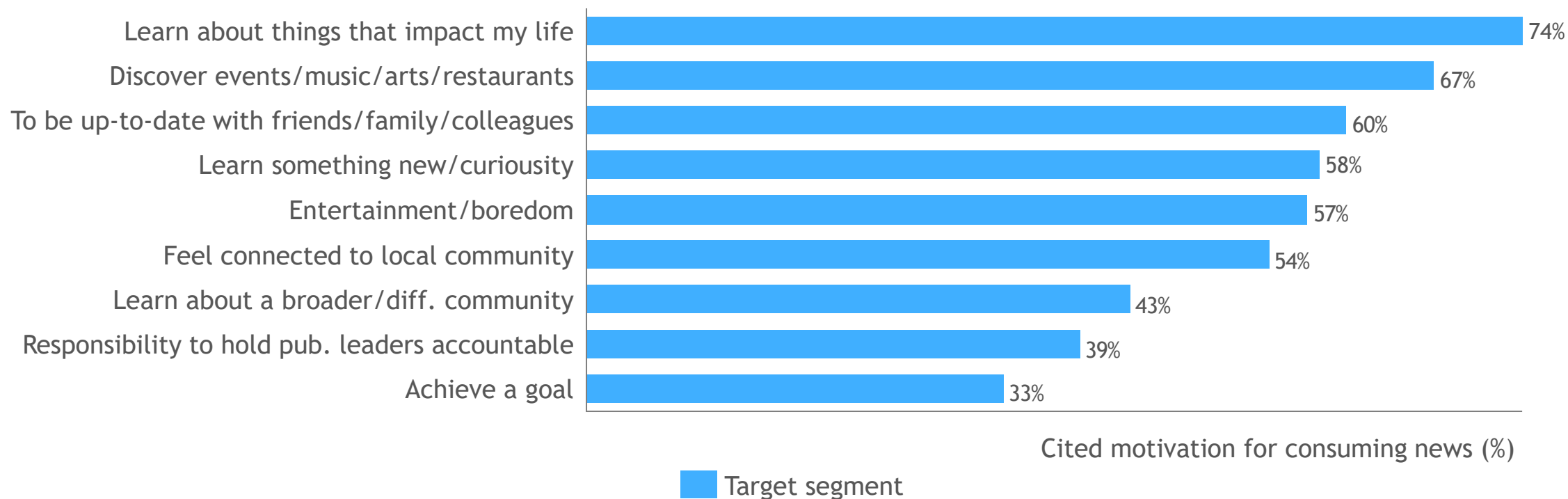


Survey question

Across all topics, which information sources do you use? (Select all that apply)



Target segment prefers to consume news that impacts their day-to-day lives, less interested in abstract topics



Survey question

What are your motivations for consuming published content and information?

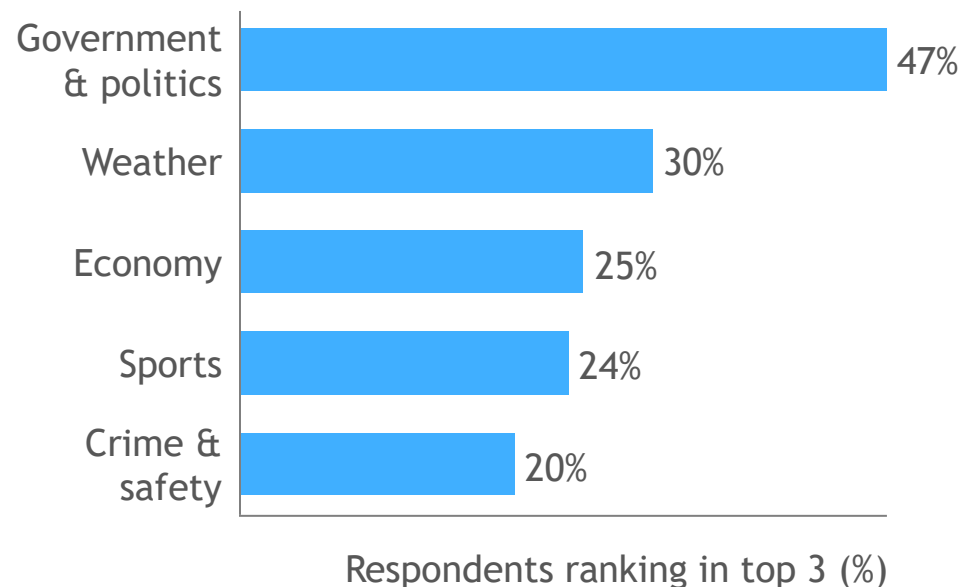


Key insights

Format & topic preferences

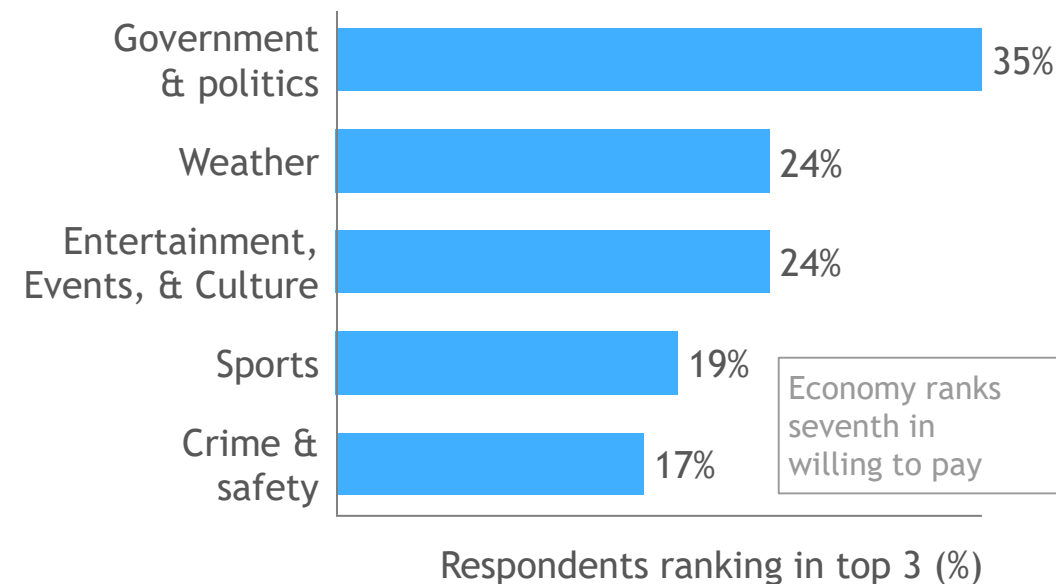
Target most interested in government and politics (47%); and topic interests closely aligned with WTP

Target segment consumption—top five topics



Survey question Of the topics that you typically consume, please rank them in order of importance to you:

Target willing to pay—top five topics



Survey question Thinking about paying for local information, please rank which topics of information you would be most likely to pay for:

Mobile has the most frequent touch-points with users, 41% are seeking news multiple times per day

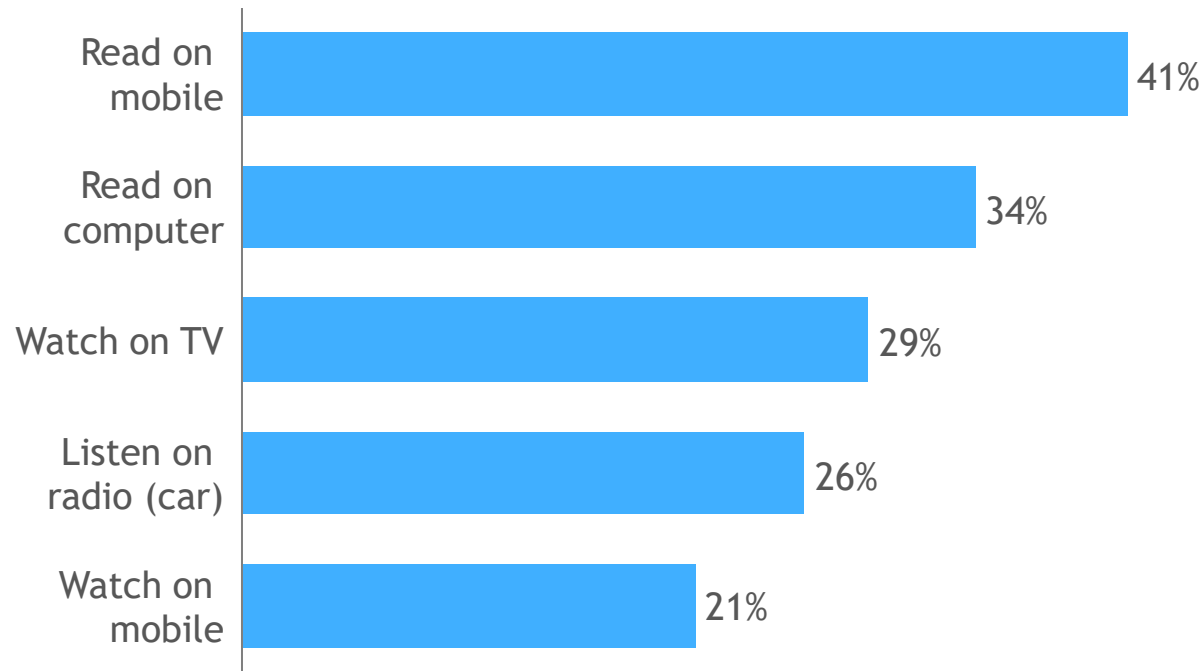


News is consumed throughout the day, spanning from the morning or afternoon (61%) to winding down in the evening (65%)



Format preferences are time-dependent

- In morning, reading on mobile (24%) and computer (21%) are most common
- In evening, TV is most-used (34%)

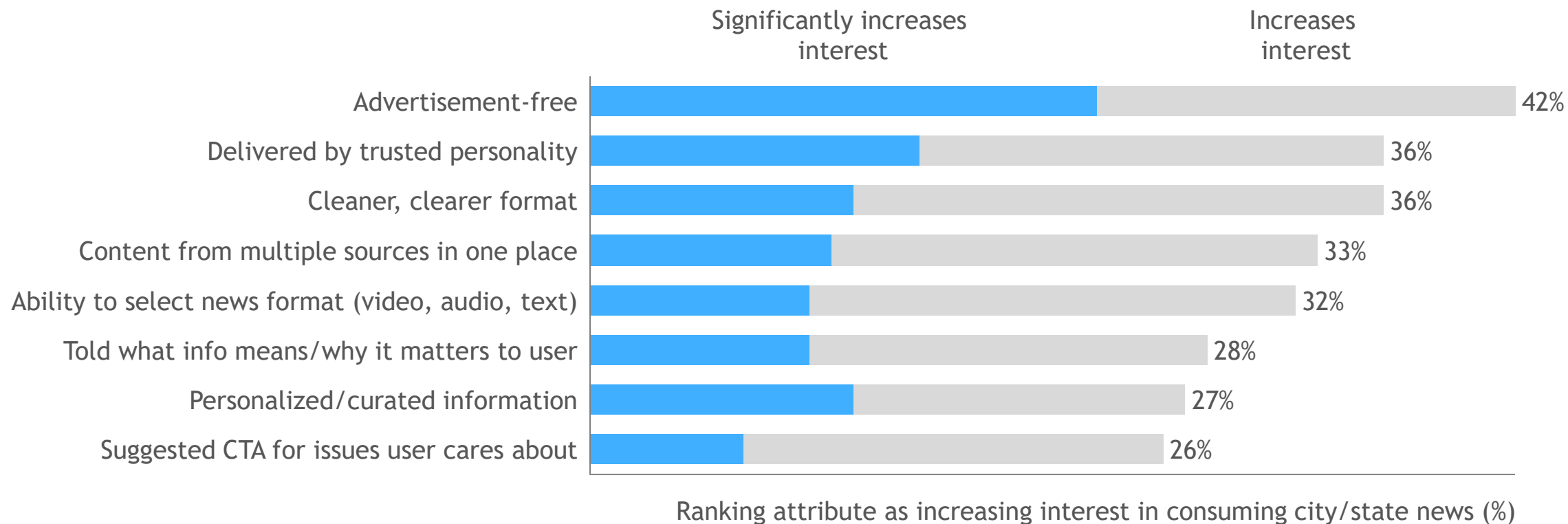


Respondents that use format several times per day (%)

Survey question

Please specify how frequently you consume information in the following ways:

Can increase target's interest in city and state news by building trust; driven largely by how content is delivered, as well as who delivers it



Survey question

To what extent would the following factors increase your interest in consuming information related to developments in your city and state?



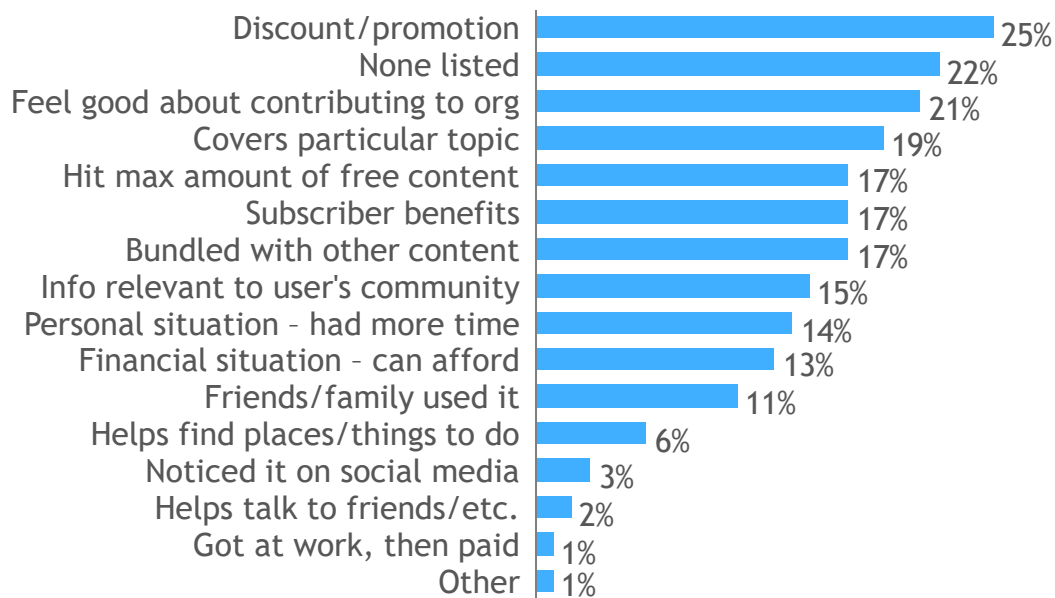
Key insights

Willingness to pay



Pricing (25%), feeling good about contributing to an org. (21%) and topic coverage (19%) are target segment's most important willingness to pay drivers

Willing to pay reasons: discount/promotion (25%) feel good about contributing to an org. (18%)

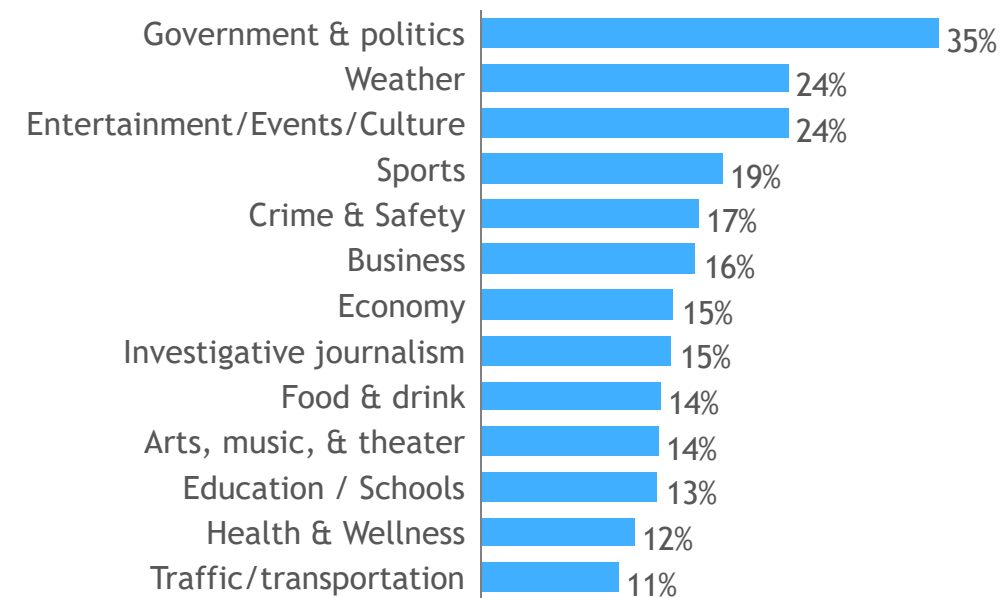


Target segment cited as reason willing to pay (%)

Survey question

For the information outlets you do not pay for, what would make you consider paying for this information?

Willing to pay topics: Gov't and politics (35%), weather (24%) and entertainment/events (24%)



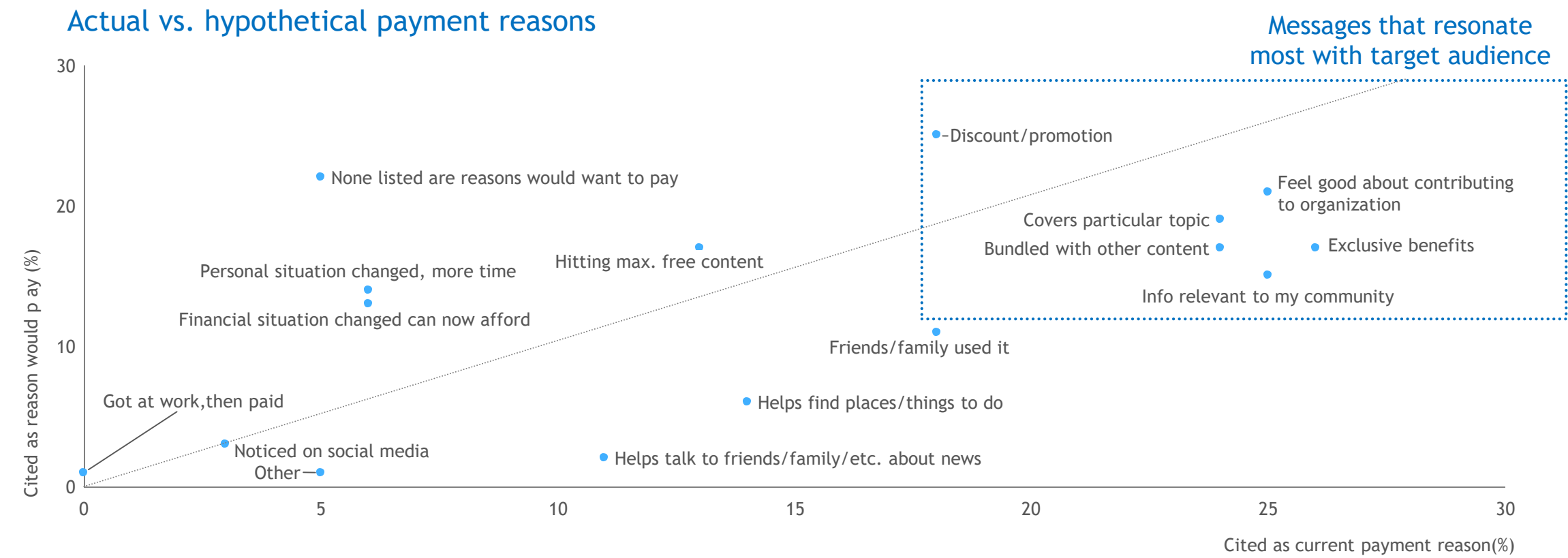
Target segment ranked in top 3 topics willing to pay for (%)

Survey question

Thinking about paying for local information, please rank which topics of information you would be most likely to pay for



Current payment reasons cited less often as reasons target would pay for additional outlets



Survey question

- For the information outlets you pay for, what are the main reasons you pay for these? (Select all that apply)
- For the information outlets you do not pay for, what would make you consider paying for this information?

Compendium



Compendium

Local news interest



Key insights: Local news interest

Do Coloradans want local
(neighborhood, city, state) news?
If so, which types?



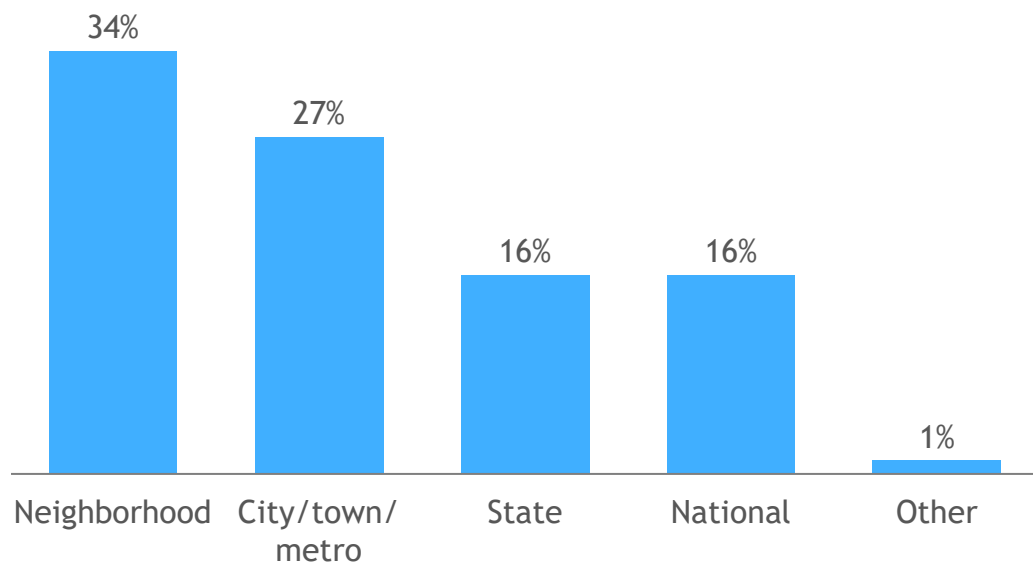
- 1 Majority of Coloradans (77%) have a strong affiliation with either neighborhood, city or state news
 - Highest affiliations to state and city news sources
- 2 Coloradans believe local and state gov't have >50% influence on their lives
 - Nat'l gov't represents the strongest (43%) influence, but local and state represent 28% and 29% influence respectively
- 3 Preferences for type of news consumption (nbhd, city, state, nat'l, etc.) vary significantly by gender/ethnicity/income/education
 - Females, Hispanics, lower income and less educated are more interested in neighborhood news
 - Males, non-Hispanics, higher income and higher educated are more interested in national news
- 4 Coloradans have a higher awareness of nat'l outlets than CO outlets
 - Awareness of CO digital outlets are all <50%
 - Awareness of nat'l digital outlets slightly higher, but lowest across all outlets
- 5 Coloradans purport to be somewhat satisfied or greater (73%) with existing outlets available to them
- 6 Coloradans are somewhat satisfied or greater (73%) with the specific outlets they use to consume information
 - Republicans and independents are least satisfied with their specific outlets with 35% and 31% respectively reporting to be neutrally satisfied or less



Coloradans' state affiliation and news interest is low relative to local and national

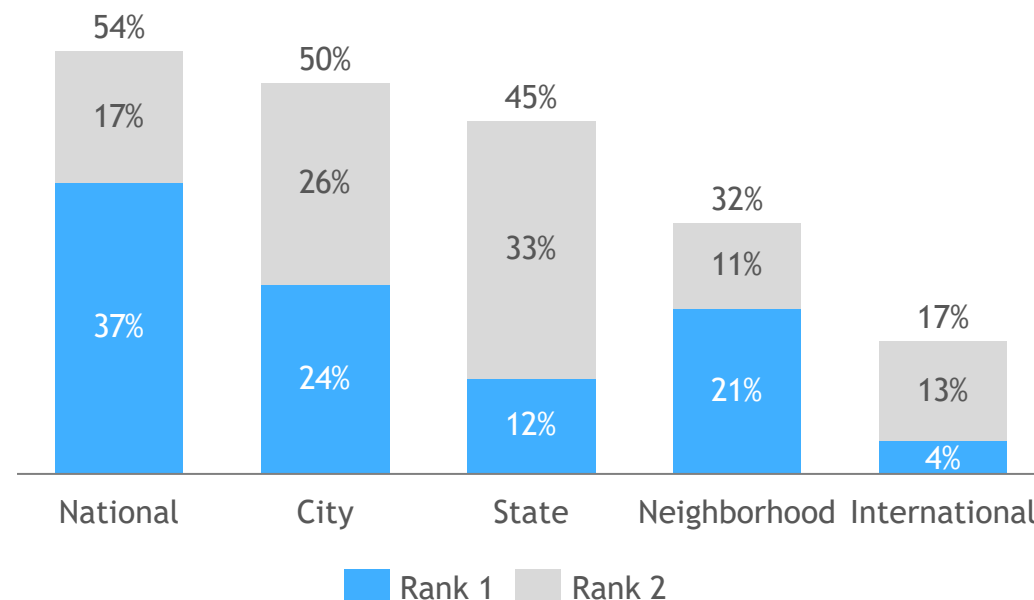
Strongest affiliations to their neighborhood and city

Respondents ranking top 3 affiliation (%)



Survey question Of the current neighborhood, city, state and country in which you live, which are you most affiliated to?

Interest in news topic, as ranked by respondent



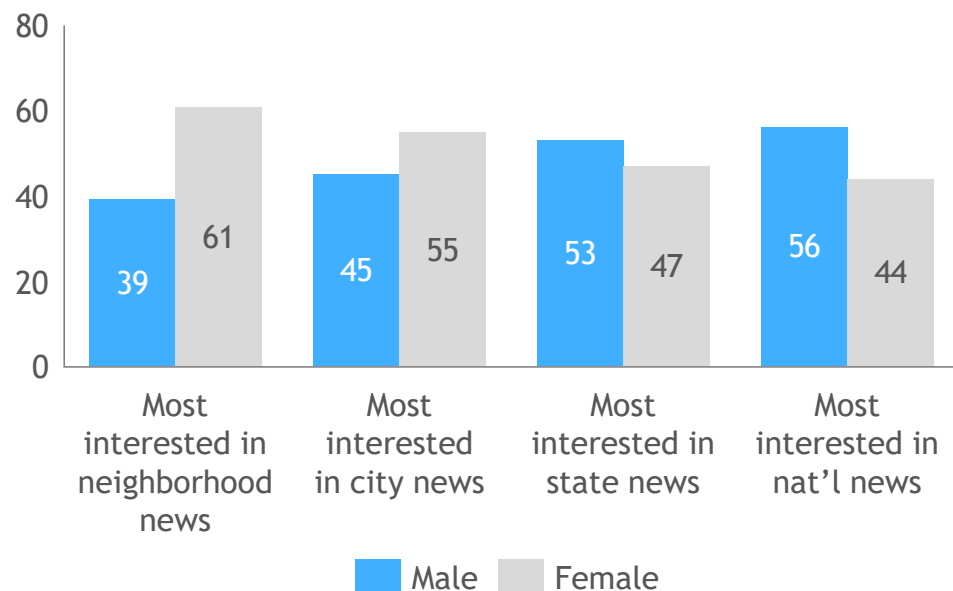
Survey question Please rank the types of information you're most interested in consuming



Interest in Colorado (neighborhood, city, state) news varies depending on gender and ethnicity

Females have high interest (61%) in neighborhood news, males have high interest (56%) in nat'l news

Avg. % interested in a information type

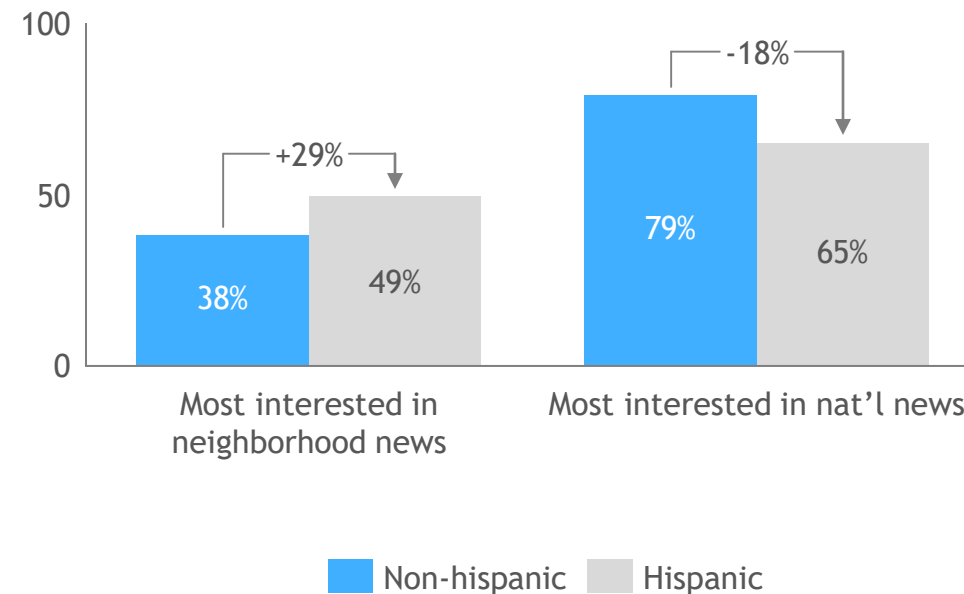


Survey question

Please rank the types of information you're most interested in consuming

Hispanic population has higher interest (49%) in nbhd news, non-Hispanic higher interest (79%) in nat'l news

Avg. % interested in a information type

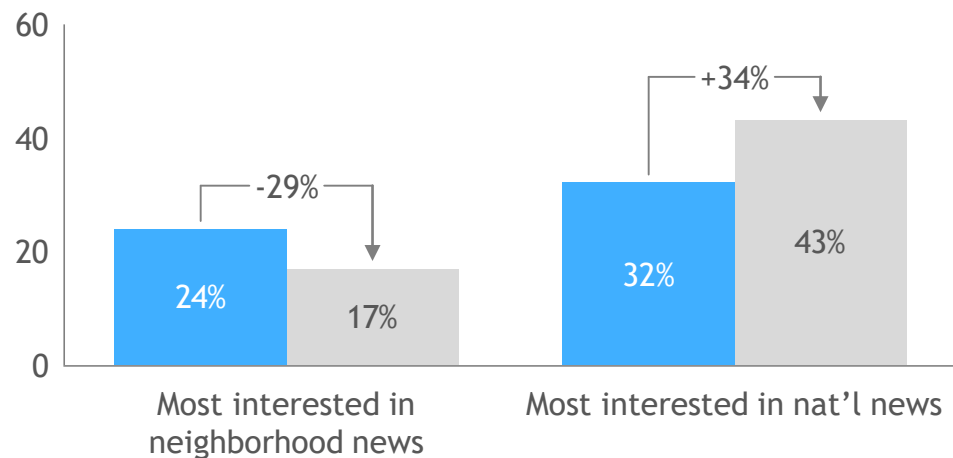




Interest in Colorado (neighborhood, city, state) news also varies depending on income and level of education

Lower income higher interest (24%) in nbhd news, higher income higher interest (43%) in nat'l news

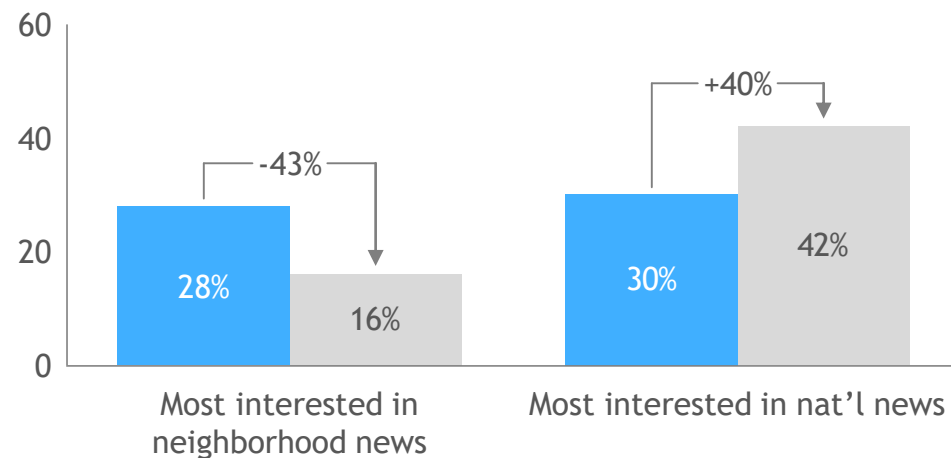
Avg. % interested in a information type



■ <\$75,000 ■ >\$75,000

Less educated higher interest (28%) in nbhd news, more educated higher interest (42%) in nat'l news

Avg. % interested in a information type



■ Some college or less ■ College graduate or higher

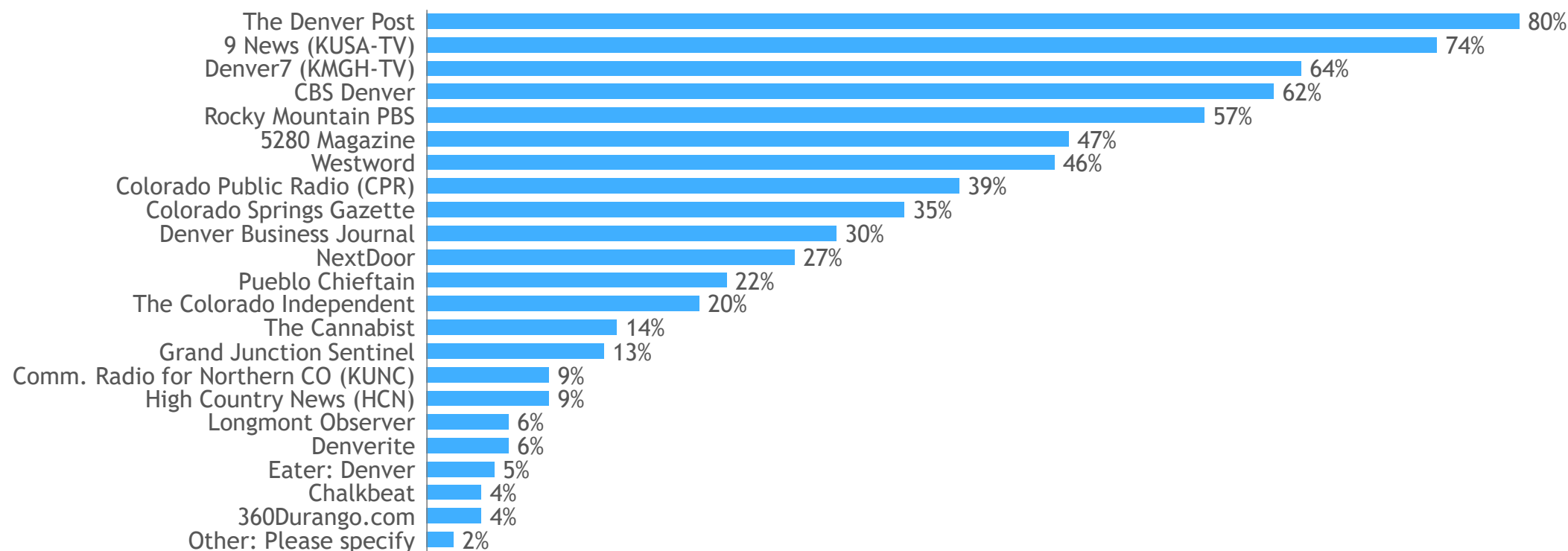
Survey
question

Please rank the types of information you're most interested in consuming



Awareness of CO outlets—outside of the major traditional print and broadcast players—is <50%

Denver outlets have highest awareness Colorado-wide



Awareness of Colorado outlets (%)

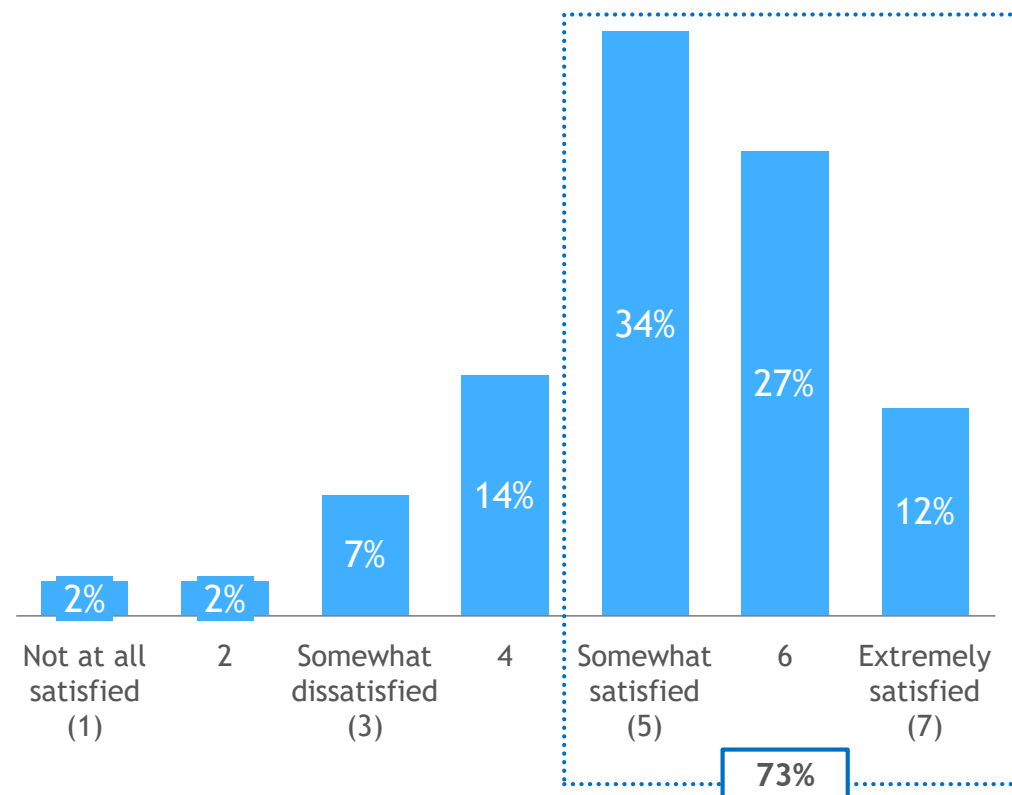
Survey
question

Which of the following information outlets are you aware of? (Select all that apply)



While majority of Coloradans are satisfied with existing CO news outlets overall, very few are extremely satisfied with the outlets (12%) and quality (8%)

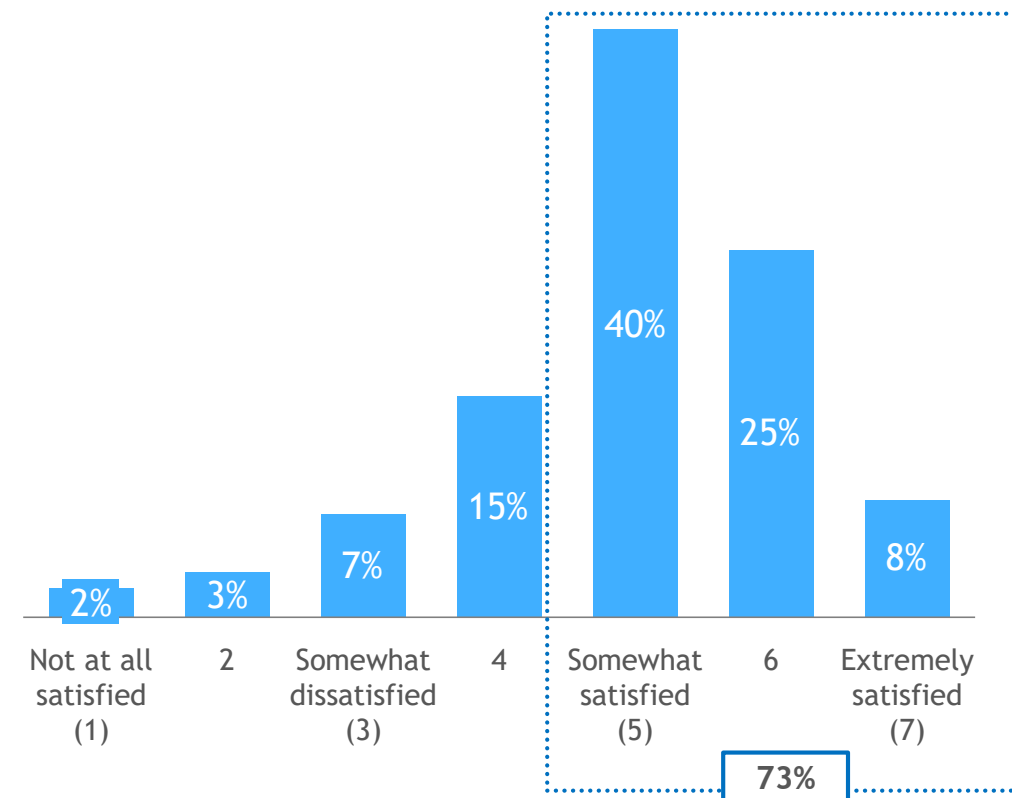
Satisfied with existing CO news outlets (%)



Survey question

How satisfied are you with the existing Colorado information outlets available to you?

Satisfied with existing CO news outlet coverage (%)



Survey question

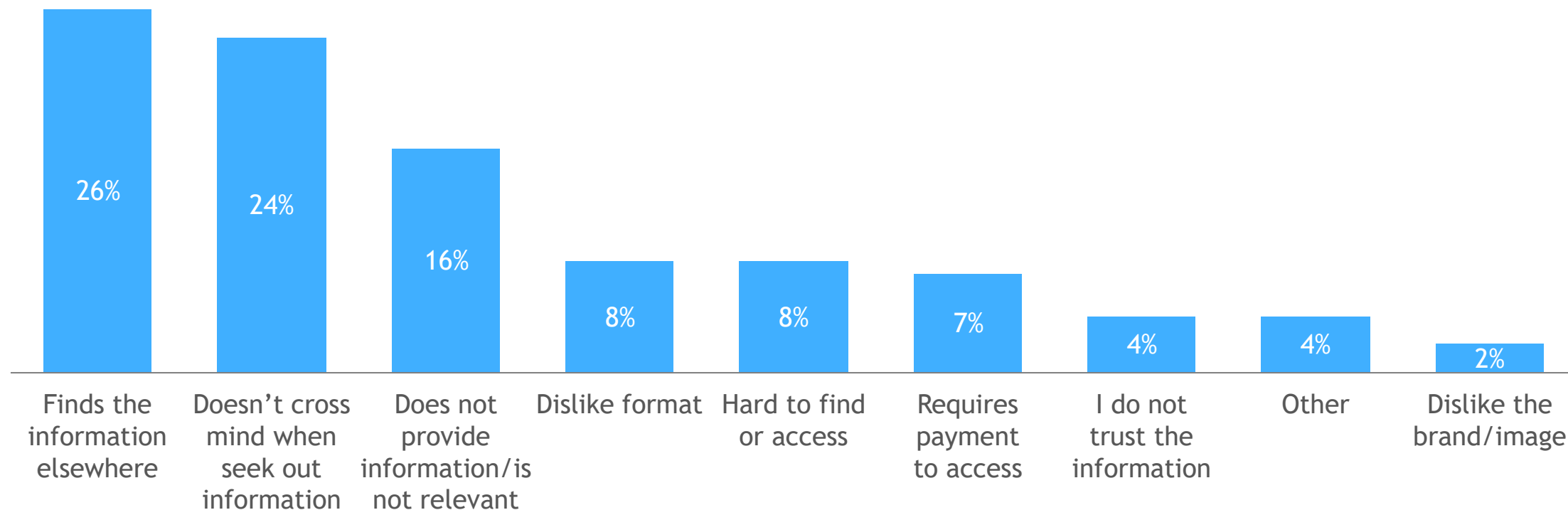
How satisfied are you with the quality of coverage by the outlets and sources you use to consume information?



Primary reasons for knowing of, but not consuming, colorado outlets are that information can be found elsewhere (26%) or source does not cross mind (24%)

Another prominent reason is local sources don't provide information or are not relevant (16%)

Selected as reason for not consuming CO outlet (%)



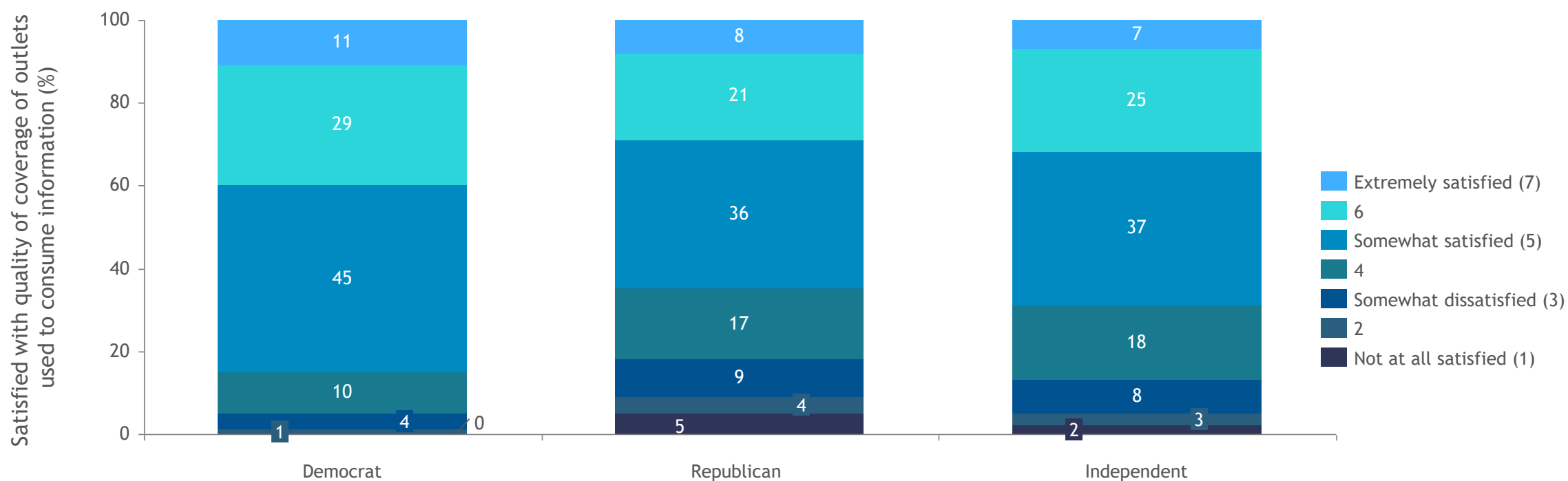
Survey question

For the Colorado information outlets that you know but do not consume, what is the main reason?



Opportunity to increase the satisfaction in quality of coverage for republicans and independents

35% of republicans and 31% of independents are neutrally satisfied or less with the quality of coverage of outlets they use to consume information



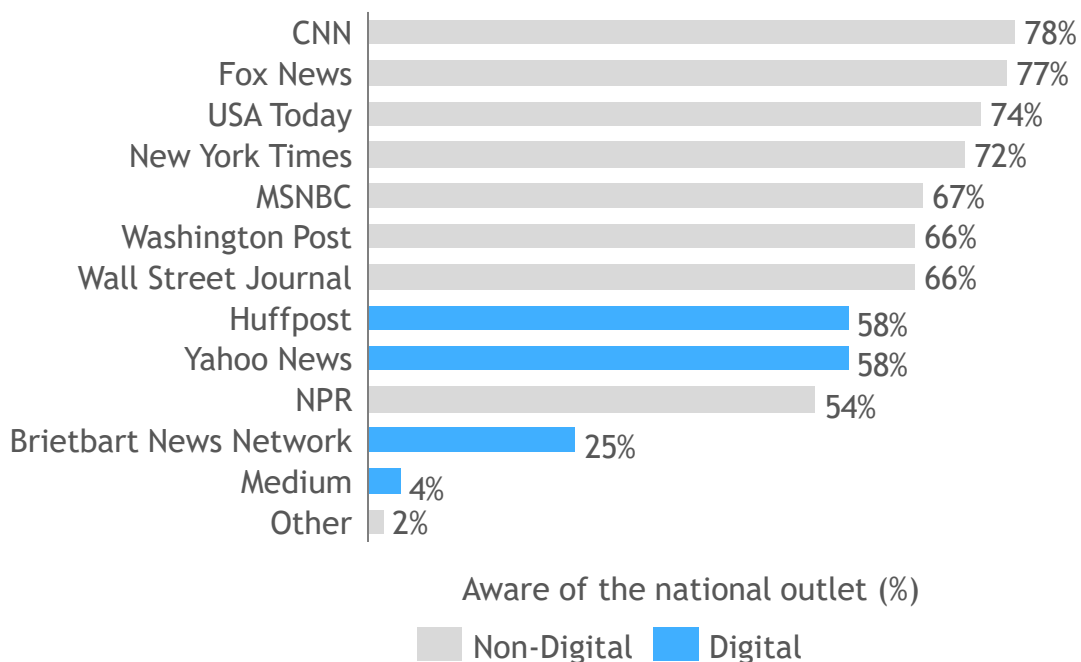
Survey question

How satisfied are you with the quality of coverage by the outlets and sources you use to consume information?



National outlets have high (58%) awareness, with two-thirds of respondents aware of more than half of the outlets

High awareness of outlets ...



... but majority of stated national outlet awareness is of traditional (non-digital) outlets

- Highest awareness for broadcast and traditional newspapers
- Digital outlets (Huffpost, Yahoo News, Brietbart, Medium) all lowest ranked outlets

Survey question

Which of the following information outlets are you aware of? (Select all that apply)



Compendium

Format & topic preferences



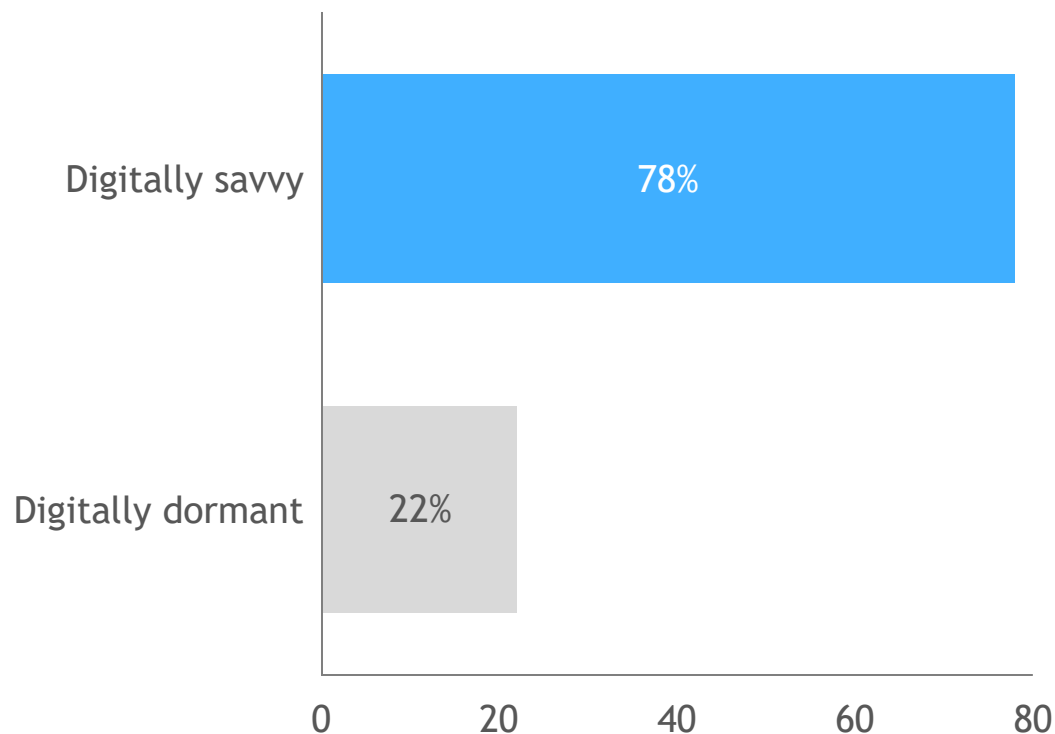
Key insights: Formats preferences—

If Coloradans want local news
what should the format look like?

- 1 77% of Coloradans use mobile for news 1x/day or more (digitally savvy) and 22% use mobile for news <1x/week (digitally dormant)
 - Digitally dormant are younger (75% aged 44+) and identify as Independent (43%)
 - Digitally savvy are younger (58% aged 18-44)
- 2 Nearly two-thirds of Coloradans' primary motivation for consuming news is to learn about things that impact their life
 - Digitally savvy has much stronger secondary motivations: 23% more motivated by entertainment, 16% more motivated by being up to date to share and 26% more motivated to discover new things
- 3 Coloradan's most used information source (59%) is local broadcast and less than half of Coloradans use a digital outlet
 - Digitally savvy users are 49% more likely to use an aggregator, 34% more likely to use a national digital outlet and 67% more likely to use a local digital outlet
- 4 Majority of Coloradans (58%) consume news at least once per day, and over one third consume several times per day or at least once per week
 - **Reading news:** 32% of Coloradans read news on their mobile several times per day and 33% read news on their computer at least once per day
 - **Watching news:** 37% of Coloradans watch news on their TV and 23% watch on their computer at least once per day
 - **Listening to news:** Nearly one fifth of Coloradans listen to radio in their car at least once per week or more frequently, but >50% don't listen to news
- 5 Apps are the top three most preferred format for Coloradans consuming news on mobile
 - Hispanic population prefers social or entertainment apps 25%+ more than non-Hispanic population
 - 18-44 aged respondents have stronger preference (~50%+) for apps on mobile, whereas 45+ have stronger preference (85%+) for mobile news via email 65%
- 6 Most Coloradans read headlines, summaries, or full-length articles rather than long-form



Coloradans are distributed between those who are digitally savvy (78%) and digitally dormant (22%)



Digitally savvy defined as user that reads/watches/listens on mobile/tablet 1x/day or more



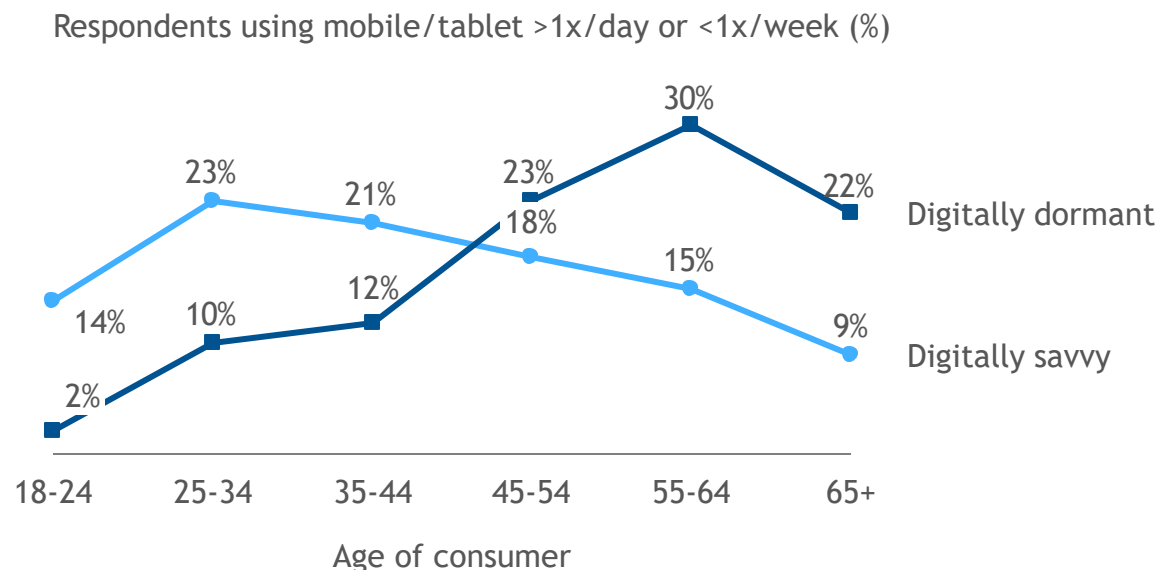
Digitally dormant defined as user that reads/watches/listens on mobile/tablet <1x/week or less

Survey question

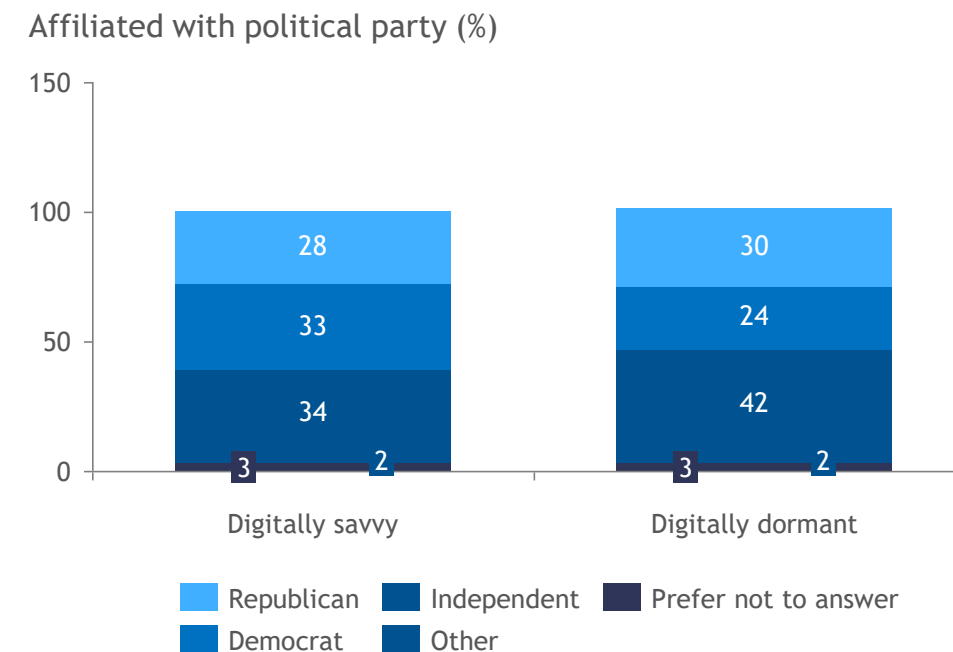
Please specify how frequently you consume information in the follow ways:

Digitally dormant consumers are older and report the strongest affiliation with the Independent party

75% of digitally dormant Coloradans are aged 45+ and 58% of digitally savvy Coloradans are aged ≤44



Digitally dormant 24% more to be an Independent and digitally savvy 27% more likely to be a Democrat



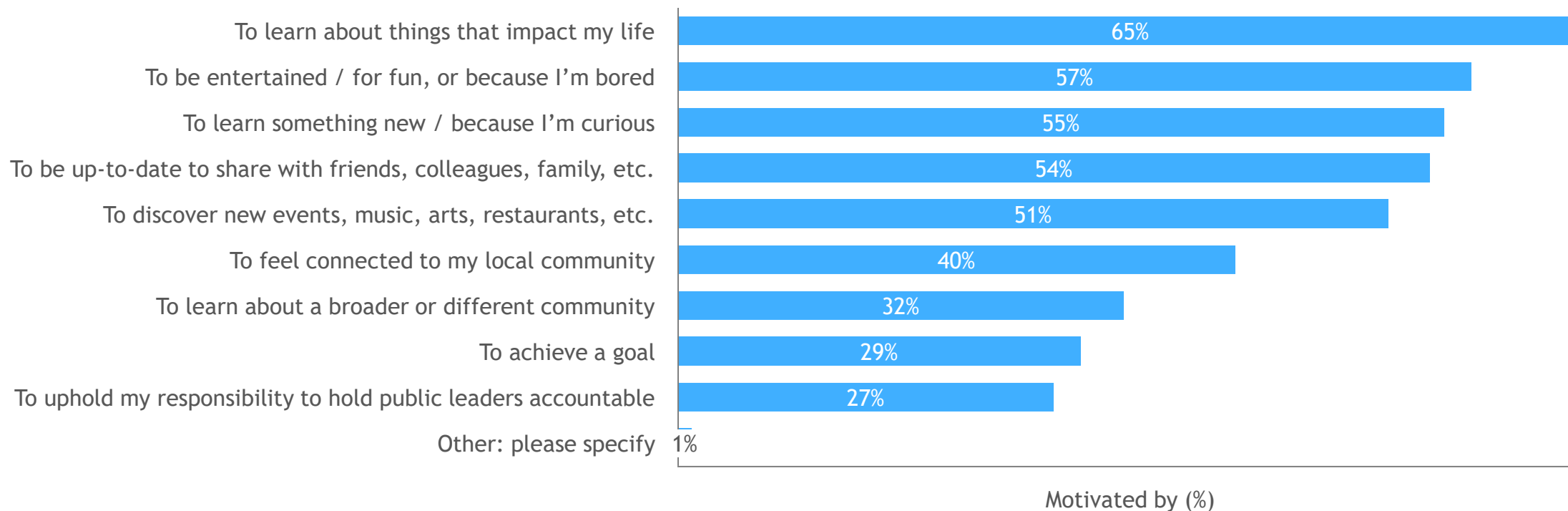
Survey question

- Please tell us your age
- Please specify how frequently you consume information in the follow ways

Survey question

In politics today, do you consider yourself most closely identified as a Republican, Democrat, or Independent?

Primary motivations for consuming news for Coloradans as a whole are learning about things that impact life, entertainment, learning

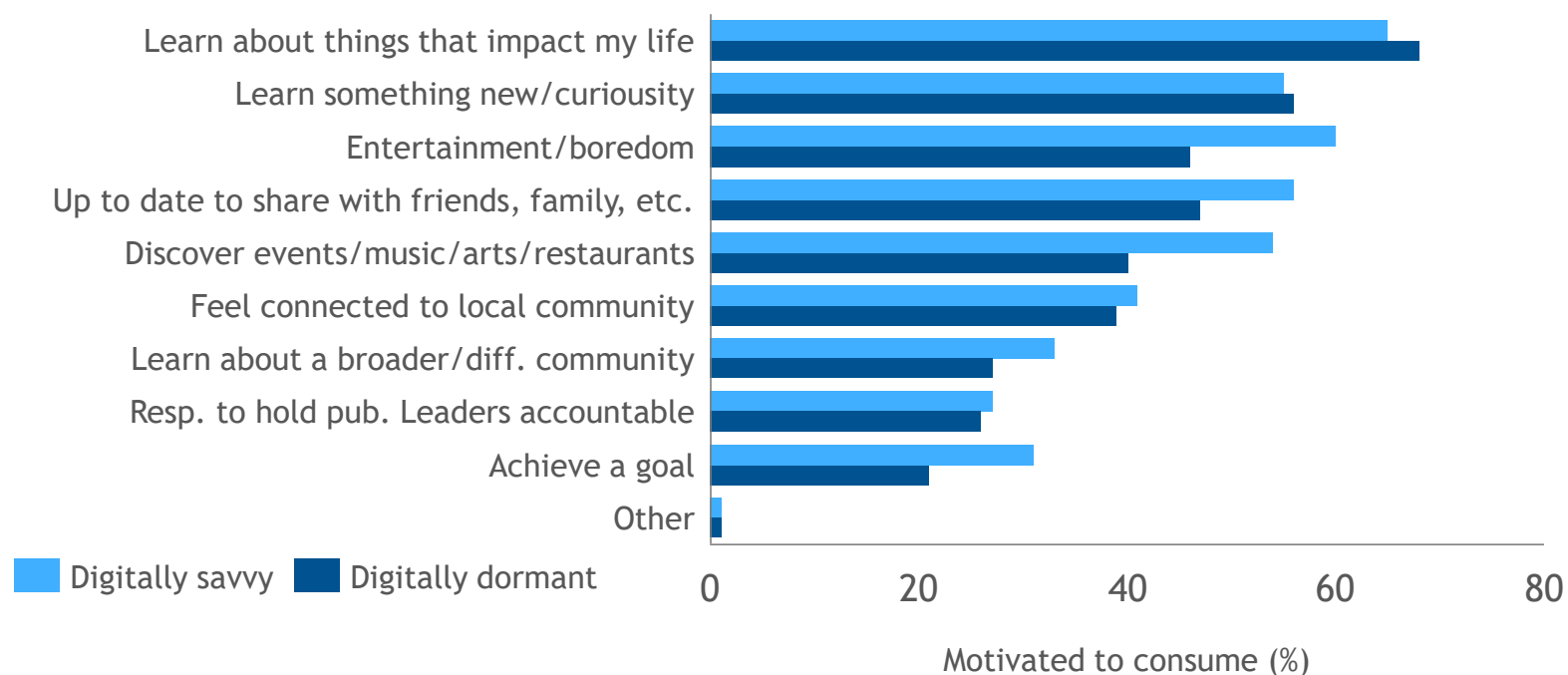


Survey question

What are your motivations for consuming published content and information?

Digitally savvy respondents use media for more uses than dormant respondents, with strongest differentiation in secondary motivations

Digitally savvy (65%) and dormant (68%) primarily motivated to learn about things that impact their life



Digitally savvy group has much stronger secondary motivations

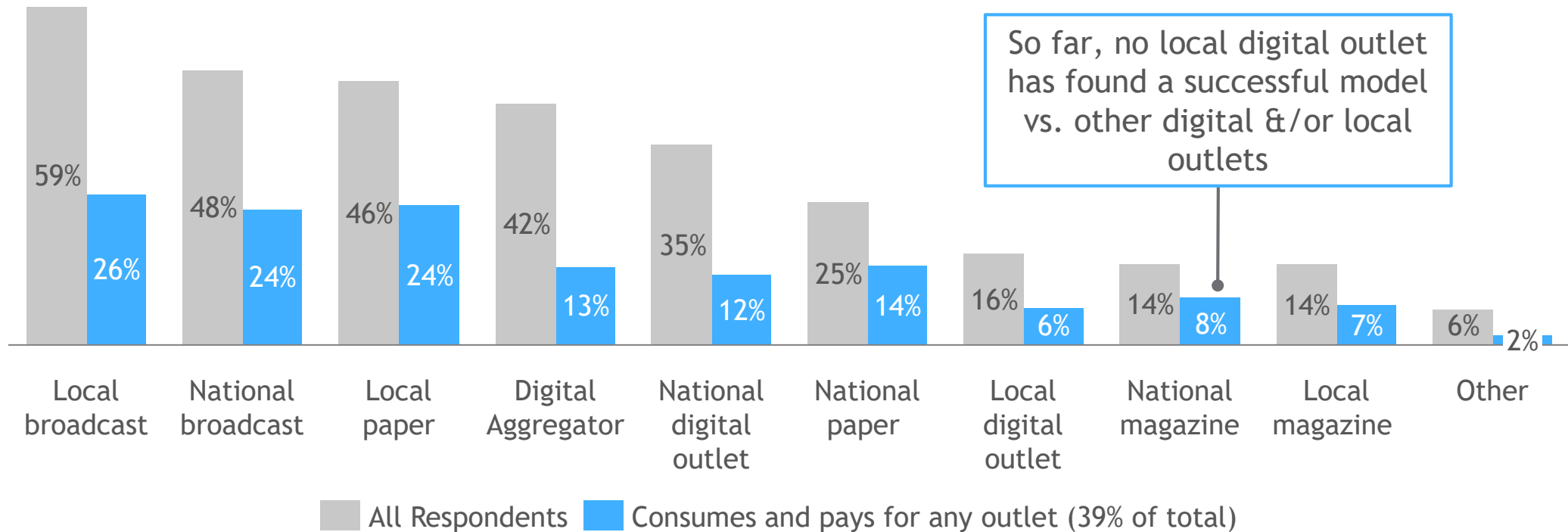
- Digitally savvy motivated much more (23%+) by entertainment
- Digitally savvy motivated more (+16%) by being up to date to share
- Digitally savvy motivated more (26%) to discover new things

Survey question

What are your motivations for consuming published content and information?

While local news sources are commonly used, digital usage of local news lags significantly (<20% of Coloradan's)

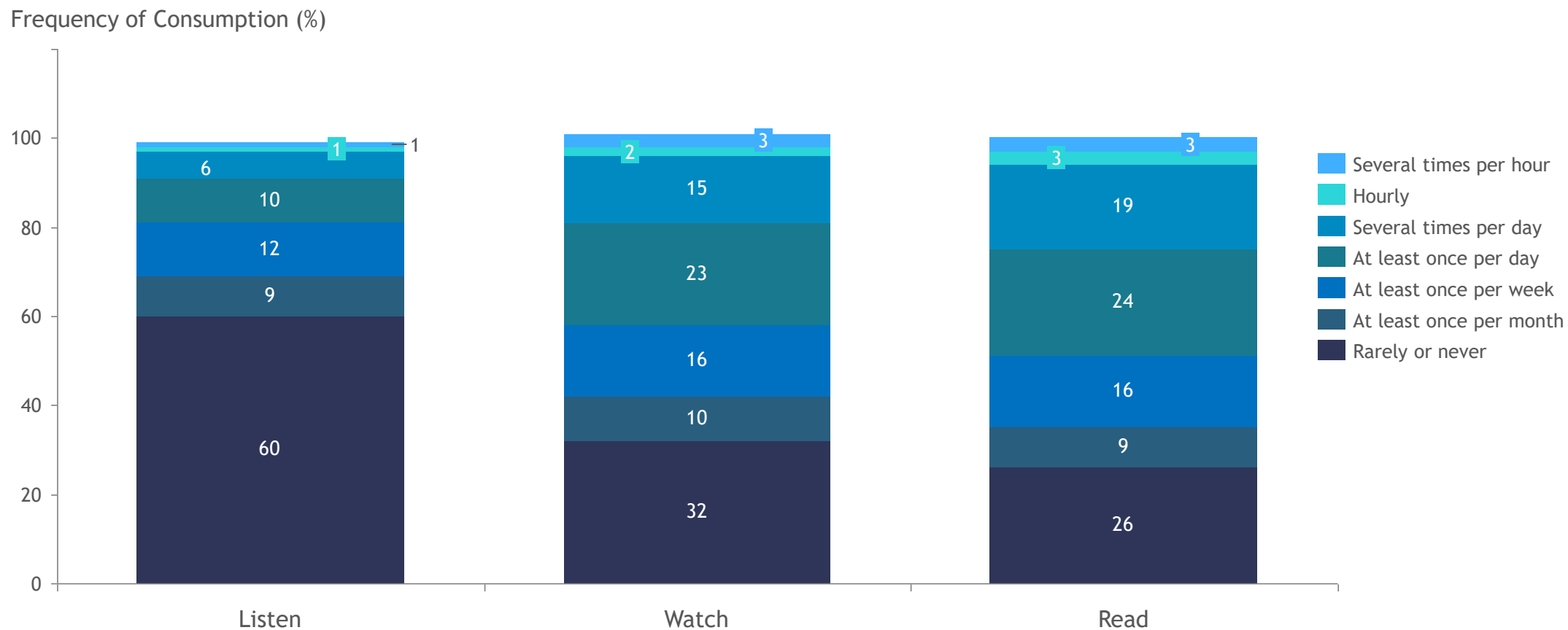
Respondents using information source (%)



Survey question

Across all topics (that you typically consume), which information sources do you use? (all respondents)

Coloradans more likely to read news content at least once per day (49%) than to watch or listen at same frequency



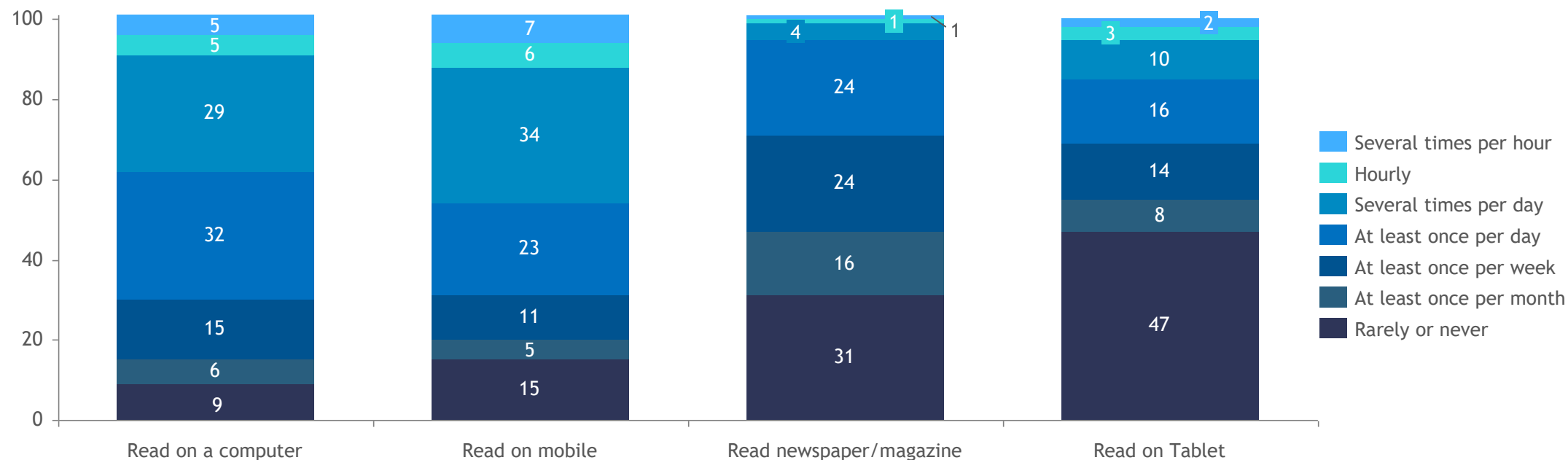
Survey question

Please specify how frequently you consume information in the follow ways ...

Most prevalent way to read news is on mobile or on a computer, at least once or several times per day

32% of coloradans read news on their mobile several times per day and 33% read news on their computer at least once per day

Reading frequency of specific formats (%)



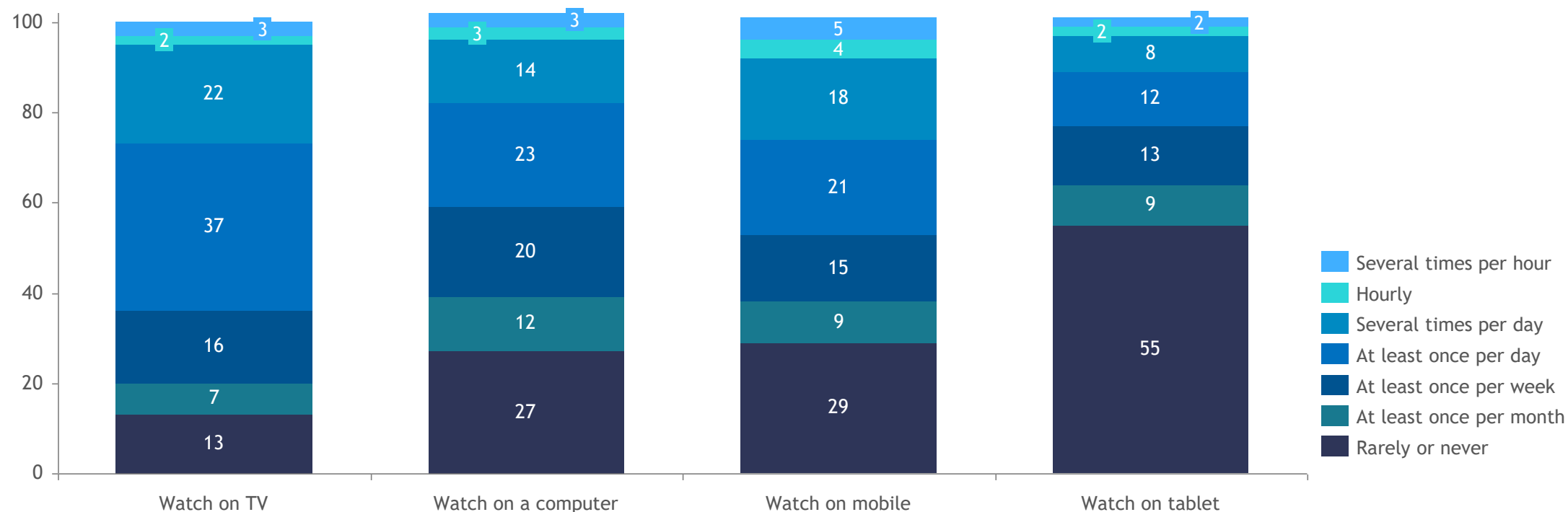
Survey question

Please specify how frequently you consume information in the follow ways ...

Most prevalent way to *watch* news is on a TV or computer, at least once/day

37% of Coloradans watch news on their TV and 23% watch on their computer at least once per day

Watching frequency of specific formats (%)

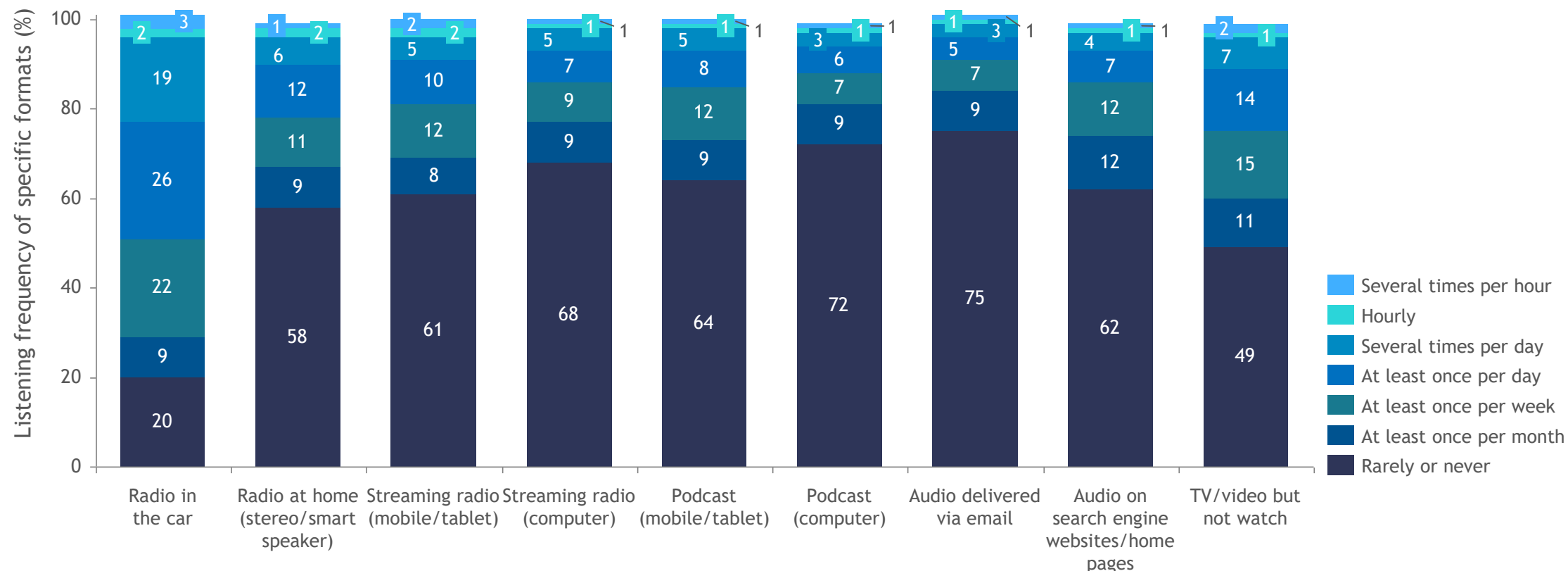


Survey question

Please specify how frequently you consume information in the follow ways...

Majority of respondents (~50%+) are not listening to news, but those that are, listen to the radio in their car

Nearly one fifth of coloradans listen to radio in their car at least once per week or more frequently

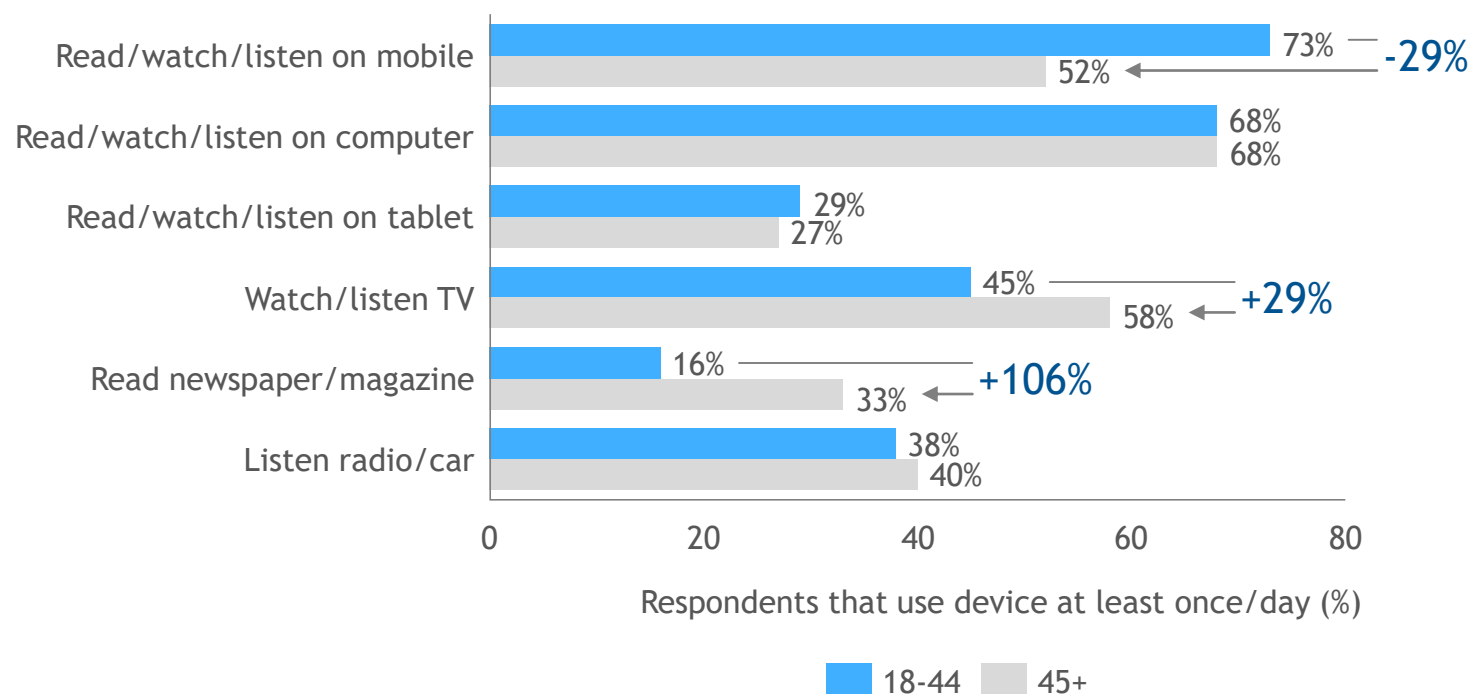


Survey question

Please specify how frequently you consume information in the follow ways ...

Significant divide between younger users (18-44) consuming on mobile and older users (45+) consuming through traditional formats

18-44 aged use mobile most frequently (73%) 45+ aged use computer most frequently (68%)



Younger users consume more on digital (mobile/tablet) than older users

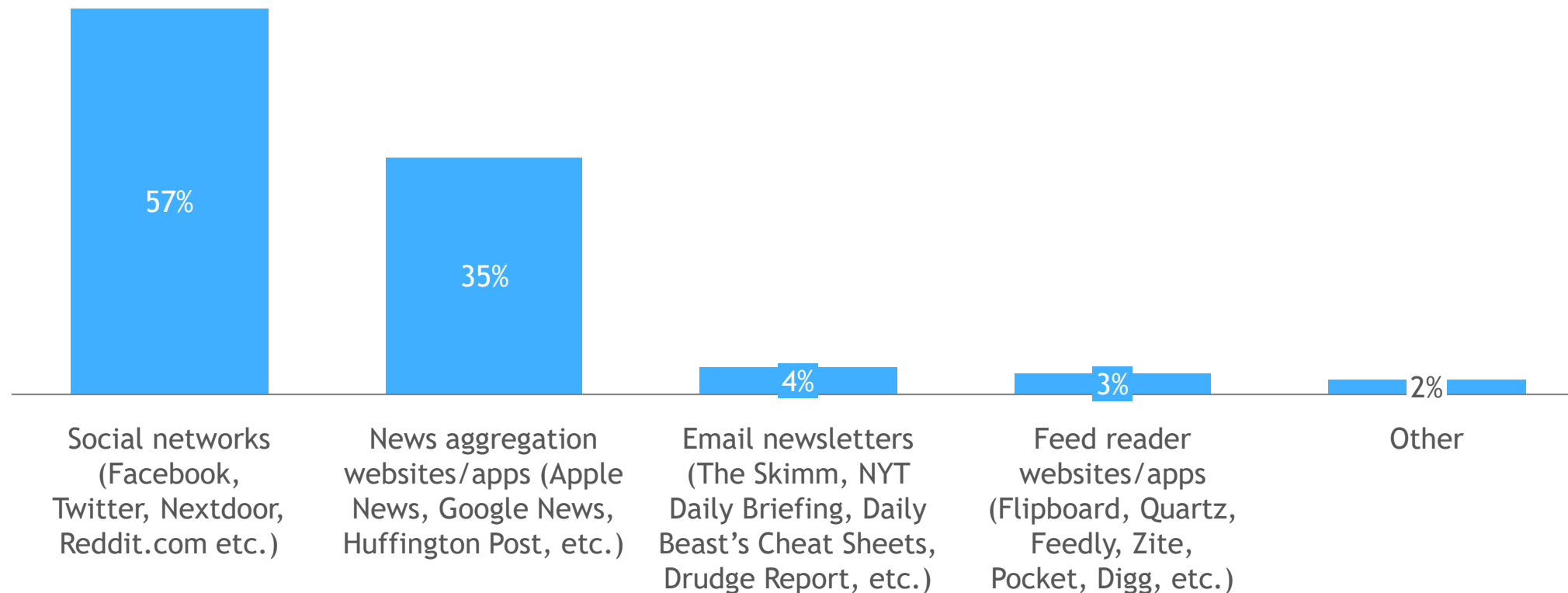
- Younger users using mobile 29% more frequently to read/watch/listen to information more than older users
- Older users watch/listen to news on the TV 29% more and read newspapers/magazines 106% more frequently than younger audiences

Survey question

Please specify how frequently you consume information in the follow ways...

Social media and news aggregation websites most frequently used aggregators

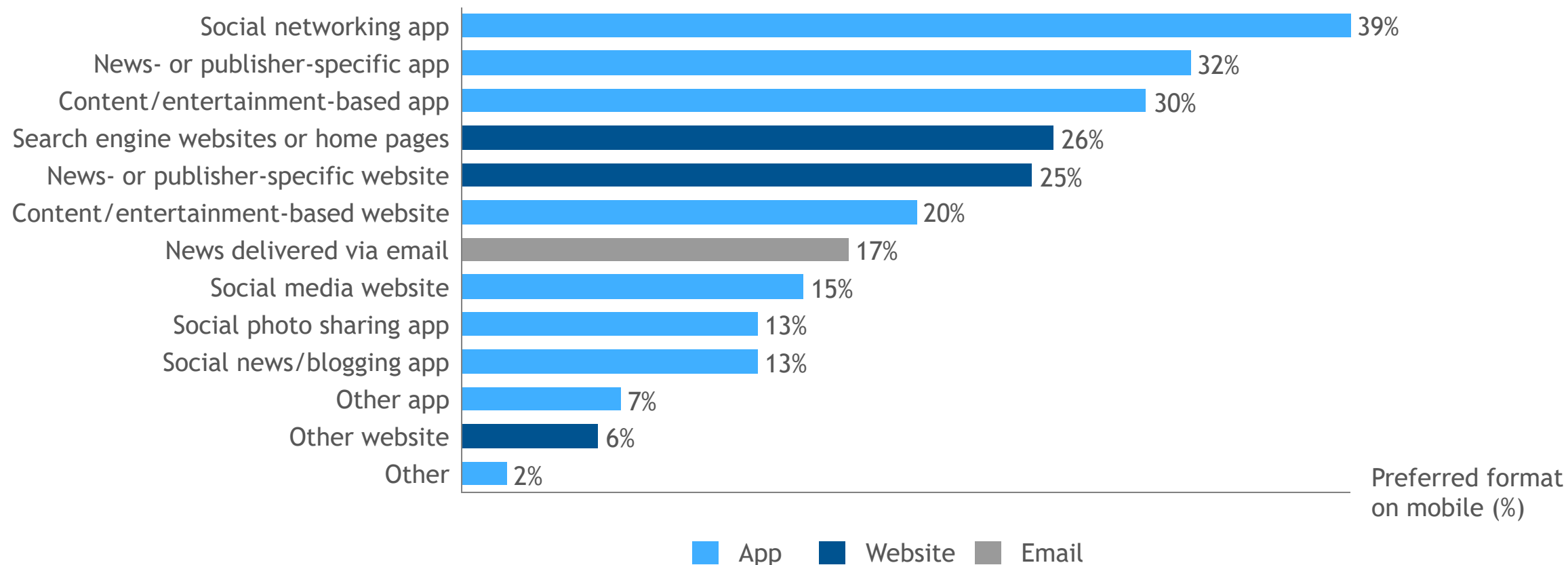
Aggregator most likely used to consume (%)



Survey question

Thinking of the aggregators you typically use to consume information, please rank them in order of most likely to consume

Similarly, more than 30% of Coloradans cite an app as preferred mobile format

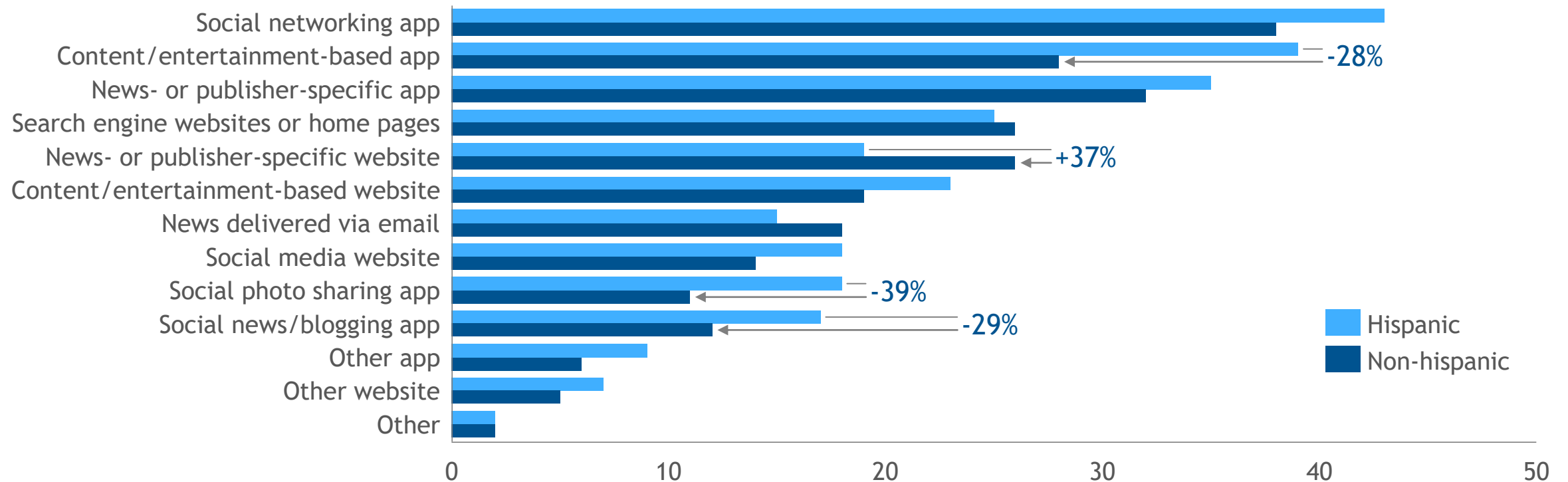


Survey question

When you typically consume information on your mobile phone or tablet, what are your preferred formats?

Hispanic and non-Hispanic population mobile format preferences segmented by entertainment/social versus news

Hispanic population prefers social or entertainment apps 25%+ more than non-Hispanic population



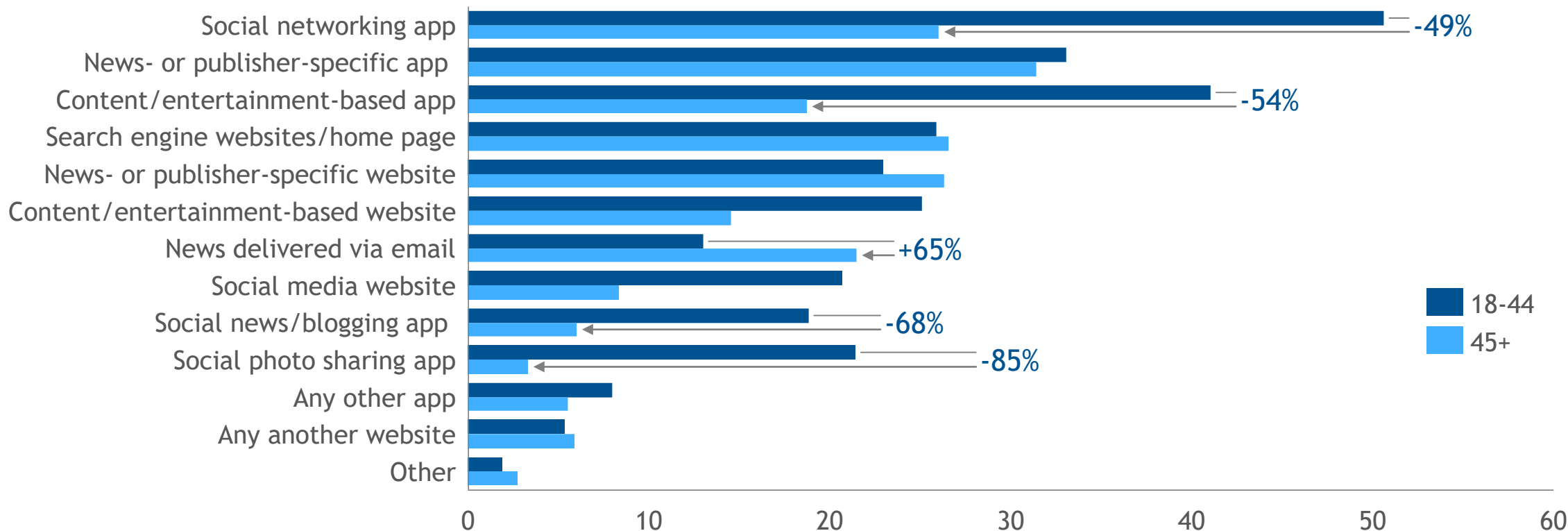
Using format on mobile (%)

Survey question

When you typically consume information on your mobile phone or tablet, what are your preferred formats?

Preferred formats for mobile news consumption heavily fragmented by age

18-44 aged respondents have stronger preference (~50%+) for apps on mobile than aged 45+ respondents, whereas 45+ have stronger preference (85%+) for mobile news via email 65%

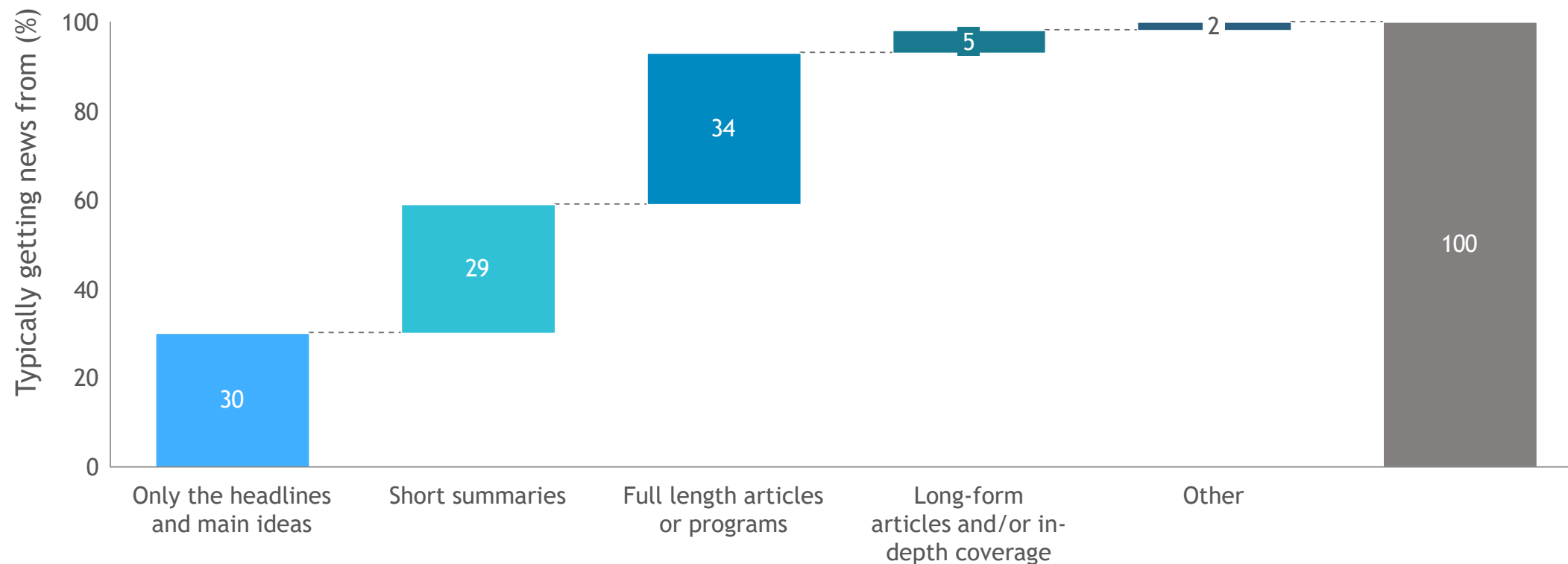


Survey
question

When you typically consume information on your mobile phone or tablet, what are your preferred formats?

Mobile respondents using format (%)

Majority of Coloradans consume most of their news in short-form formats



Survey question

Typically, I get most of my news from: (select one)



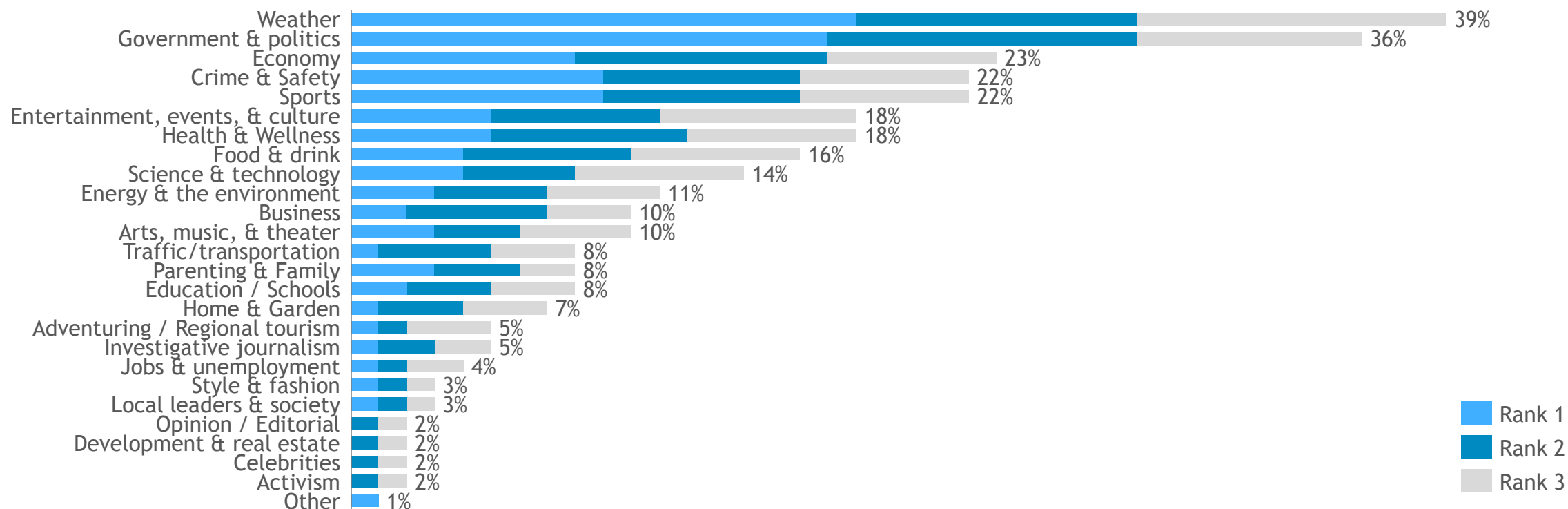
Key insights: Topic preferences

*If Coloradans want local news
what topics should that platform
cover?*

- 1 Topics ranked as most important to Coloradans are: weather, gov't & politics, the economy, crime & safety and sports
 - Weather is most frequently consumed several times per day
 - All other topics consumed most frequently at least once per day
- 2 Digital usage (both frequency of using mobile/tablet and usage of digital outlets) impacts the topics Coloradans rank as most important
 - Digitally savvy and digitally dormant rank gov't & politics and weather and topics of most importance, but digitally savvy ranks sports and crime & safety as 21% and 38% more important respectively
 - Coloradans using a digital outlet allocate higher importance (18%) to gov't & politics, and Coloradans who don't use digital outlet/aggregator allocate higher importance to weather (66%)
- 3 Whether or not a Coloradan prefers neighborhood news versus national news also heavily impacts the topics they're interested in
- 4 Length of news typically consumed correlated to preference for neighborhood vs. national news and to whether or not the respondent pays for news they consume
 - Coloradans who prefer neighborhood news or consume and don't pay for news are more likely to read just headlines and less likely to read full length articles
 - Coloradans who prefer national news or consume and pay for news are more likely to read full length articles and less likely to read just headlines

Coloradans ranked weather, gov't & politics, the economy, crime & safety and sports as the most important topics

Over one-third of respondents ranked government & politics or weather as the most important topics

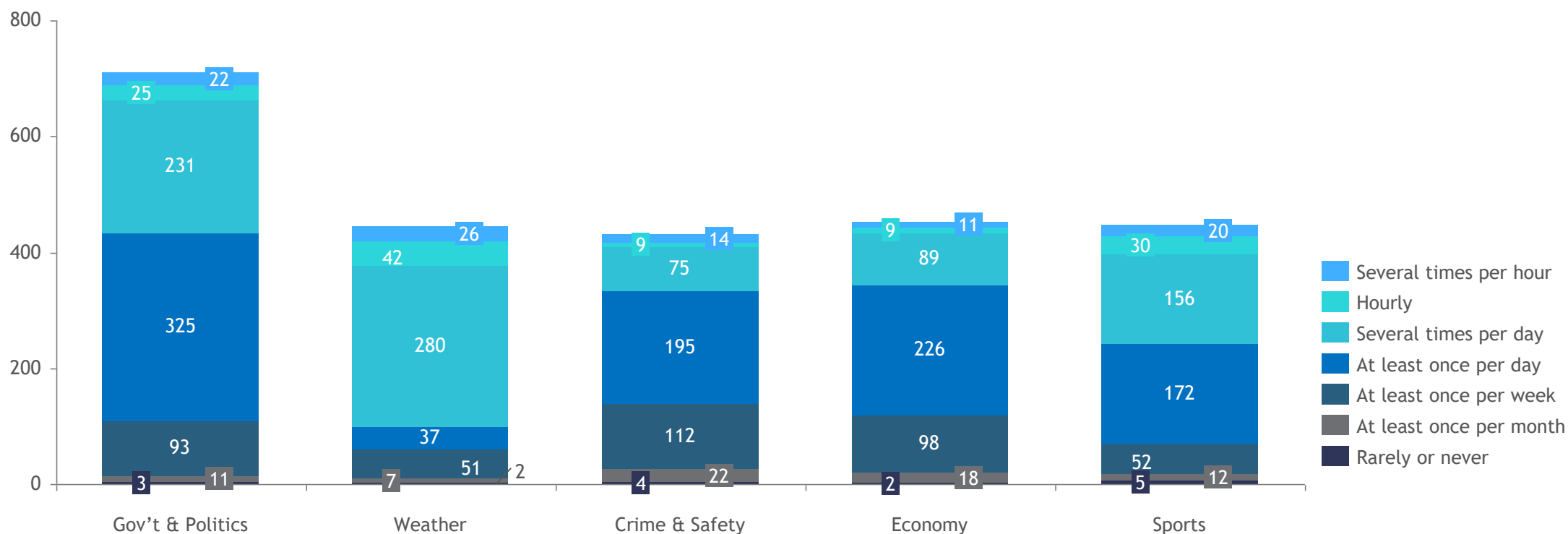


Survey question Which of the following topics do you typically consume? Of the topics that you typically consume, please rank them in order of importance to you (ranked 1-3)

The highest importance news topics are consumed one to several times per day, with very few consuming several times per day or hourly

Weather most frequently consumed several times per day—all other topics consumed most frequently at least once per day

Number of users consuming topics per frequency

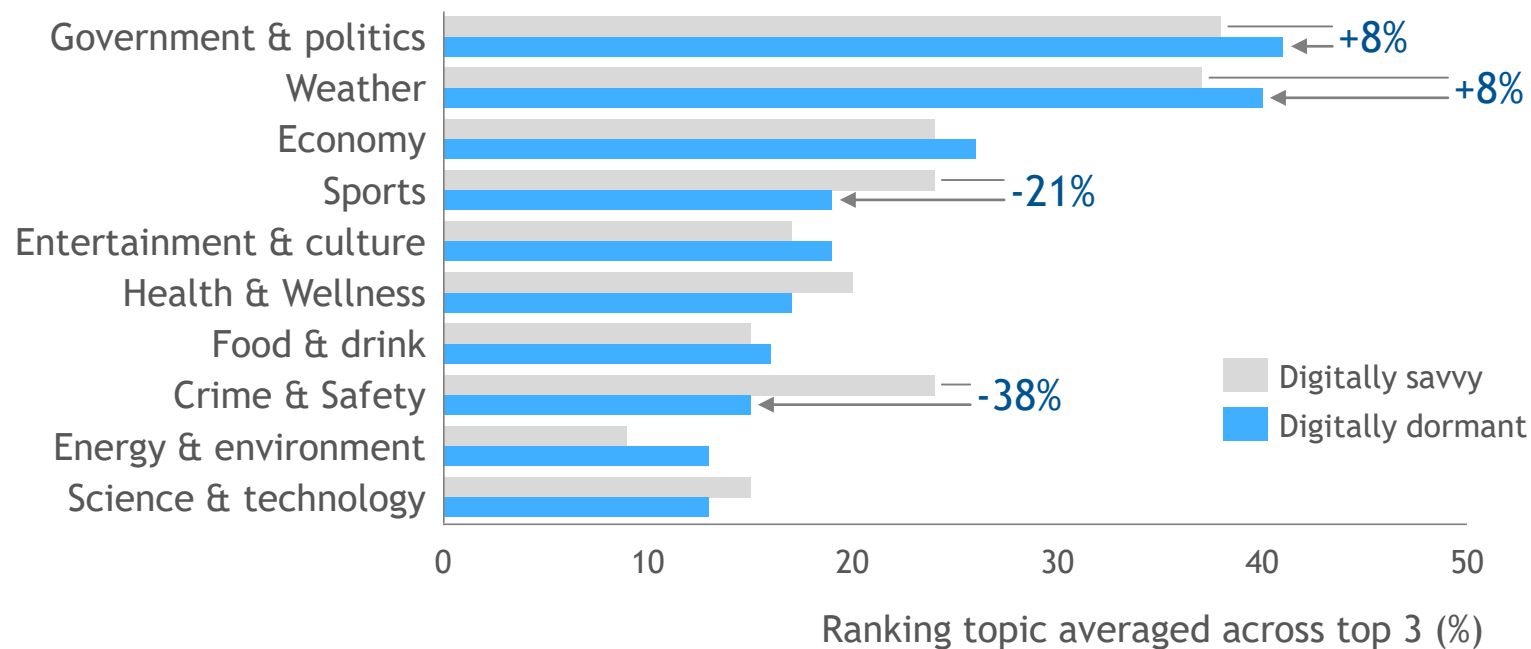


Survey question

How often do you seek out information on the topics most important to you?

Digitally savvy and dormant are aligned on the importance of majority of topics, but have preference differences

Digitally savvy and digitally dormant rank gov't & politics and weather and topics of most importance



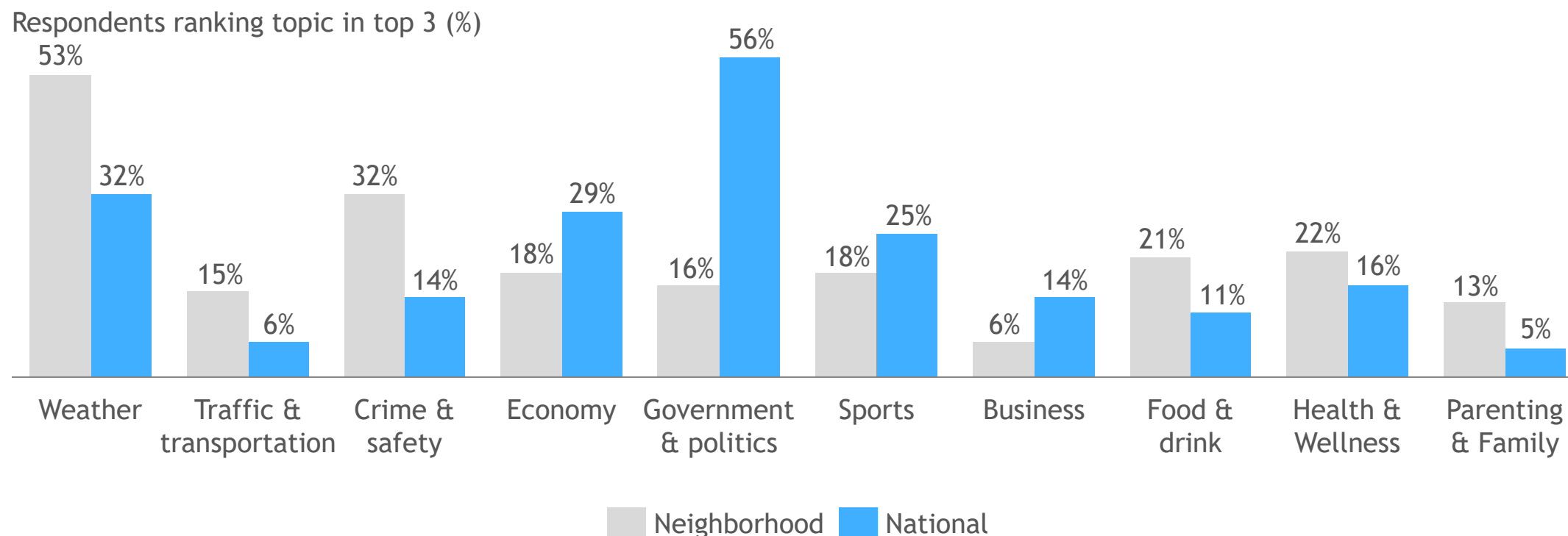
Digitally savvy respondents index higher importance on crime & safety and sports

- Digitally savvy ranks sports and crime & safety as 21% and 38% more important respectively
- Digitally dormant ranks government & politics and weather as 8% more important

Survey question Which of the following topics do you typically consume? Of the topics that you typically consume, please rank them in order of importance to you (ranked 1-3)

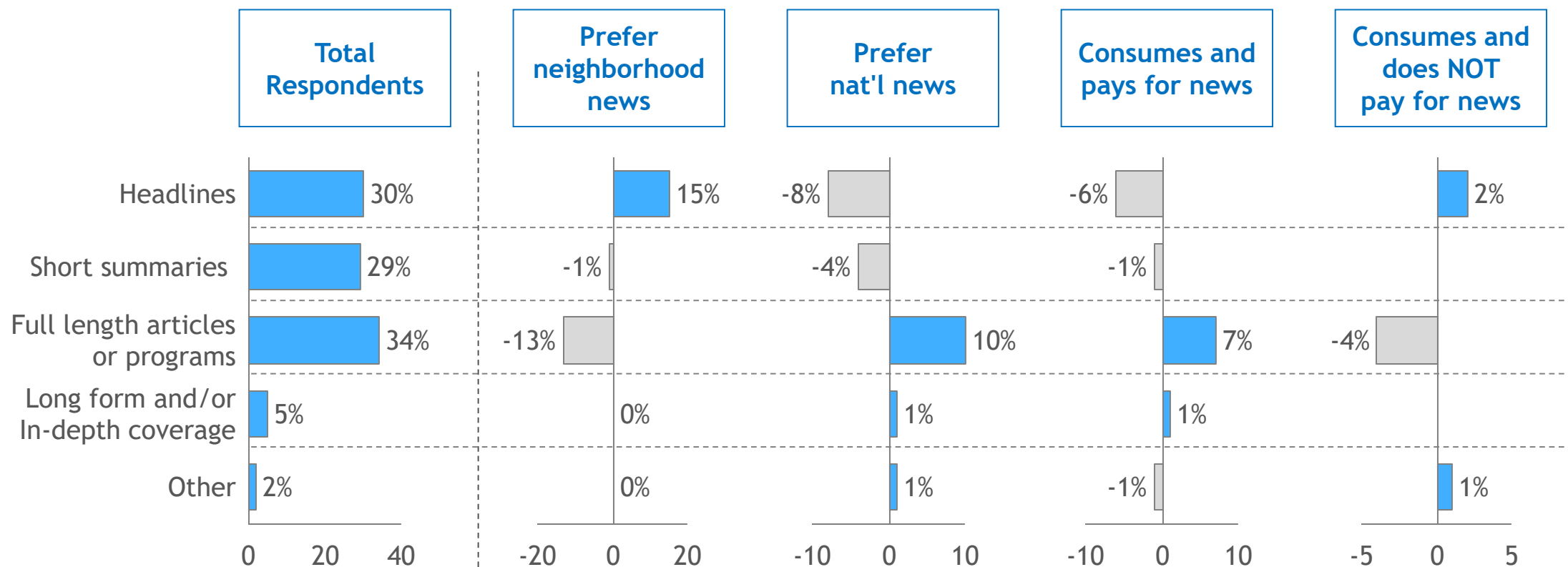
Those interested in neighborhood vs. nat'l news have significant topic preference differences

Those most interested in neighborhood news have strong preference for weather and crime & safety; and those most interested in national news have stronger preference for gov't & politics, weather and economy



Survey question Which of the following topics do you typically consume? Of the topics that you typically consume, please rank them in order of importance to you (ranked 1-3)

Preference in reading headlines versus full length articles correlated to neighborhood/national news preferences and if a respondent pays for news



Survey question

Typically I get most of my news from...



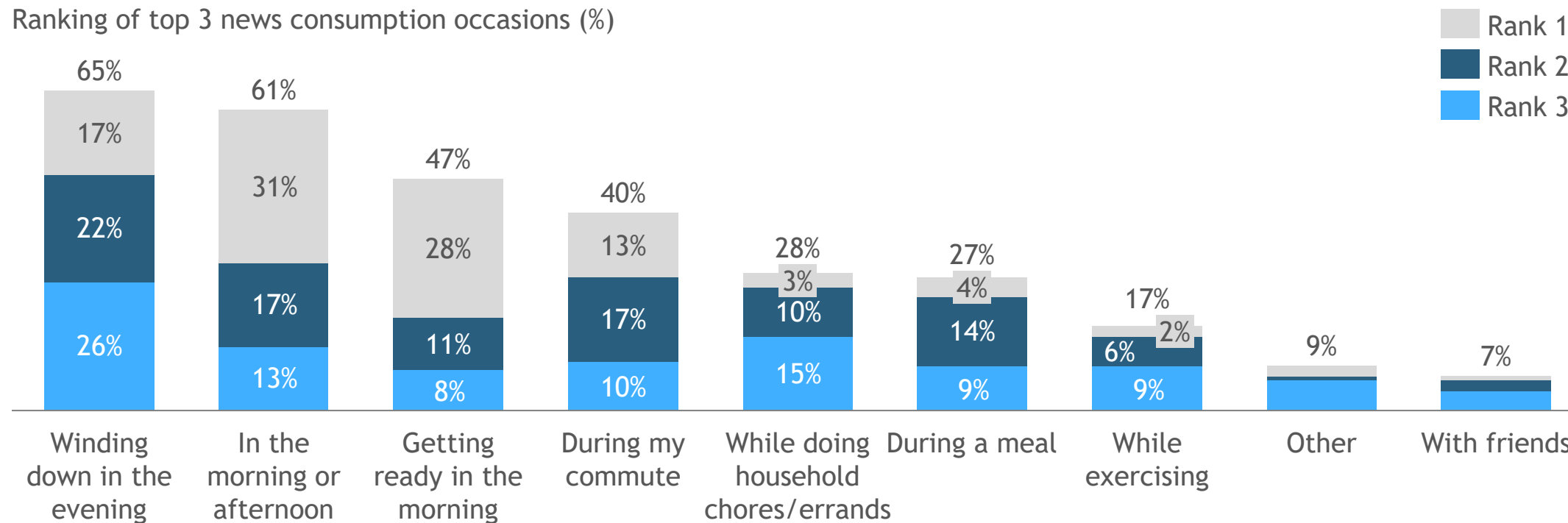
Key insights: Occasion

*If Coloradans want local news
what occasion should that
platform target?*

- 1 Coloradans prefer consuming news while winding down in the evening (65%) or in the morning/afternoon (61%)
 - Weather is most frequently consumed several times per day
 - All other topics consumed most frequently at least once per day
- 2 Preferences for news consumption occasion vary by ethnicity and age
 - Hispanic populations have a higher preference (+15%) for consuming news while getting ready and a lower preference (-14%) for consuming news while winding down in the evening
 - Younger Coloradans (18-44) have a higher preference for consuming news during their commute (+20%) and lower preference (-26%) for consuming news while winding down in evening

Respondents prefer consuming news while winding down in the evening (65%) or in the morning/afternoon (61%)

Ranking of top 3 news consumption occasions (%)

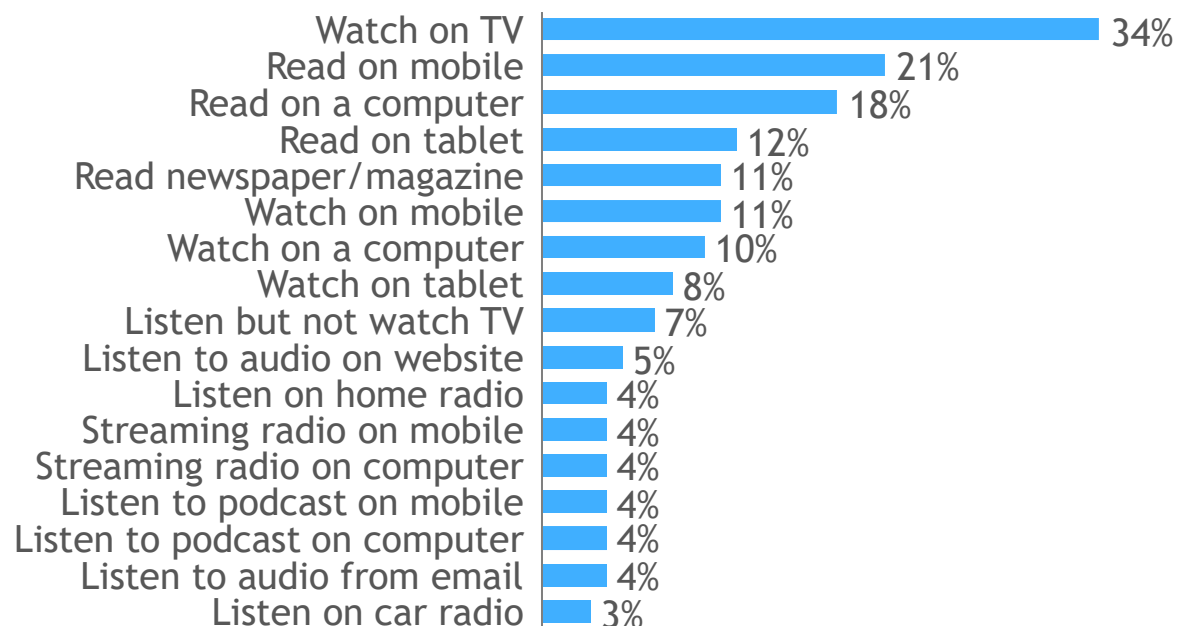


Survey question

On what occasion do you most prefer to consume information? (ranked 1-3)

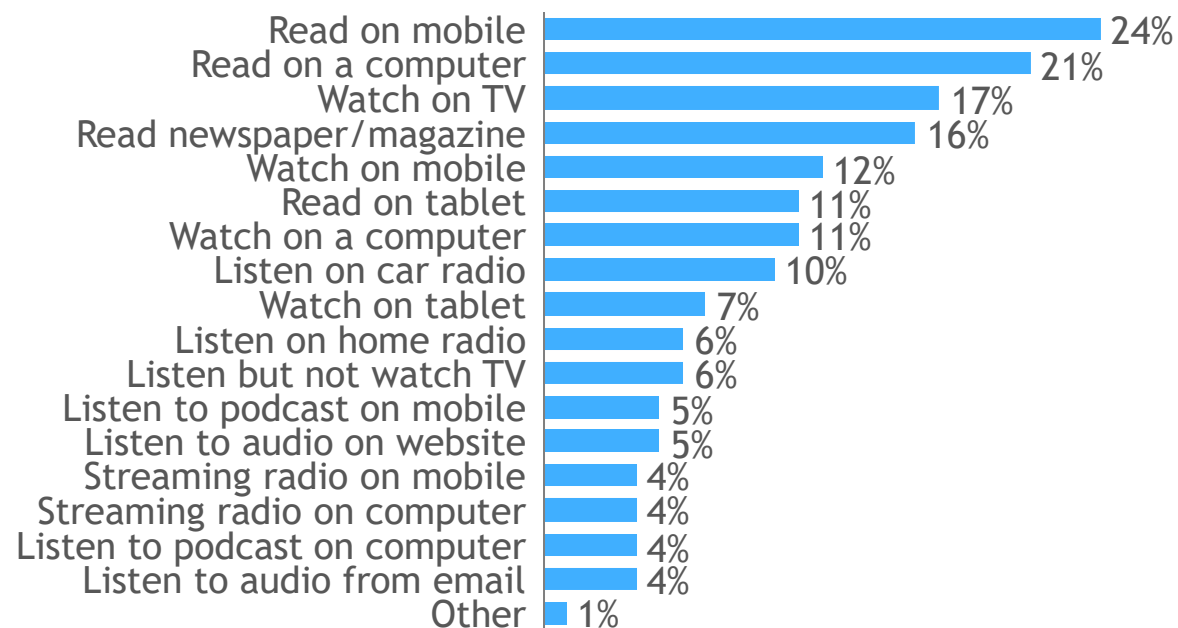
Format preferences differ by time of use: in evening, TV is most-used, while reading on mobile or computer is more common in morning

When winding down in evening, a majority watch news on TV (34%)



That use format while winding down in the evening (%)

In morning, TV is still used often (17%) but reading on mobile (24%) or computer (21%) more common



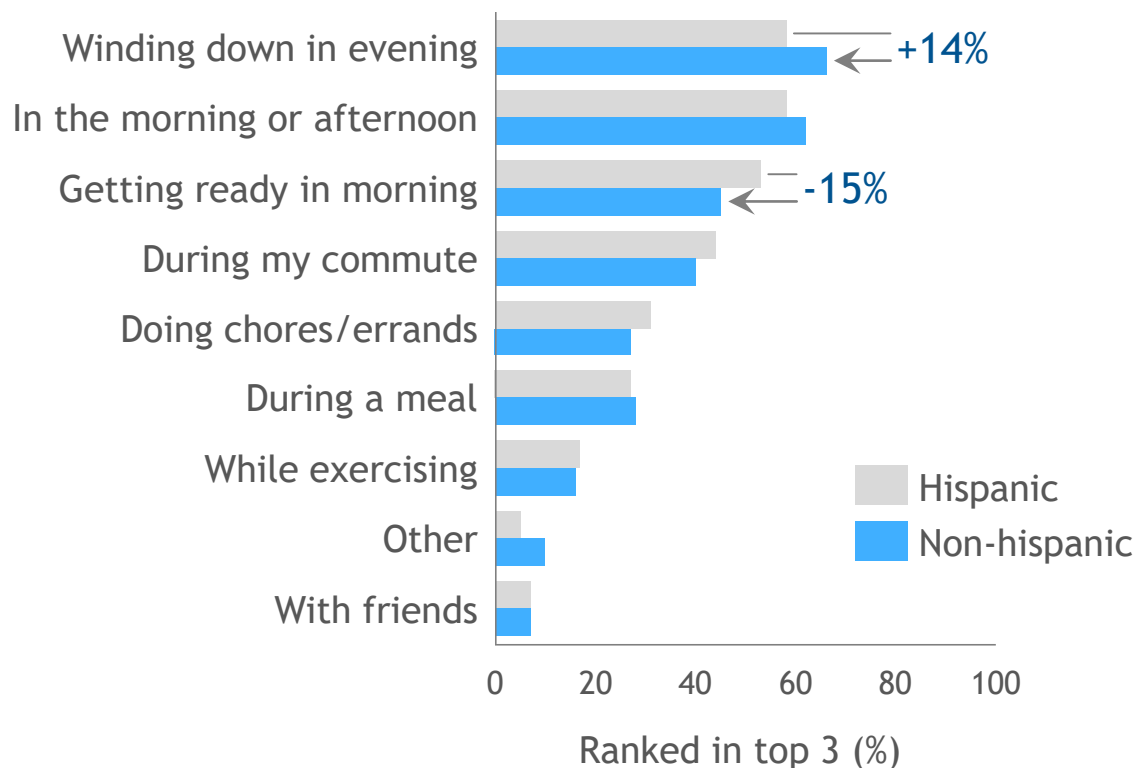
Users that use specific format in the morning/afternoon (%)

Survey question

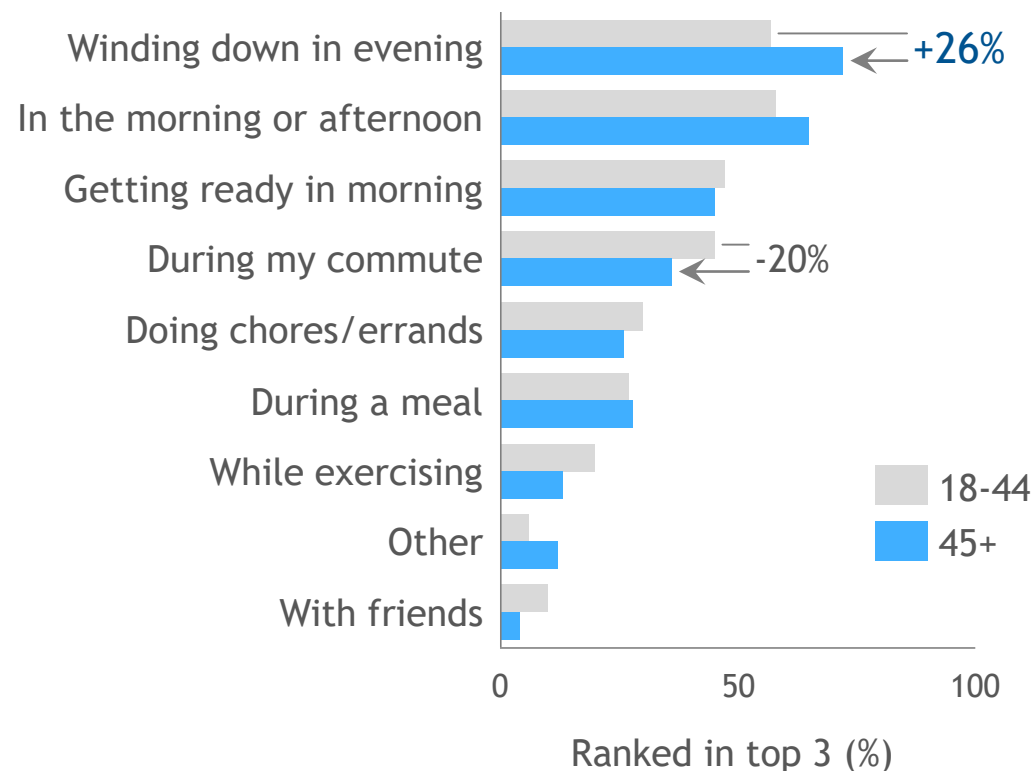
Of the occasions you prefer consuming information, what formats do you prefer for each occasion?

Occasion preferences differ based on ethnicity and on age

Hispanics higher pref. (+15%) while getting ready and lower pref. (-14%) while winding down in the evening



18-44 aged higher pref. during commute (+20%) and lower pref. (-26%) while winding down in evening



Survey
question

On what occasion do you most prefer to consume information? (ranked 1-3)



Compendium

Willingness to pay



Key insights: Willingness to pay

Are Coloradans people willing to pay for local news? If so, how much?

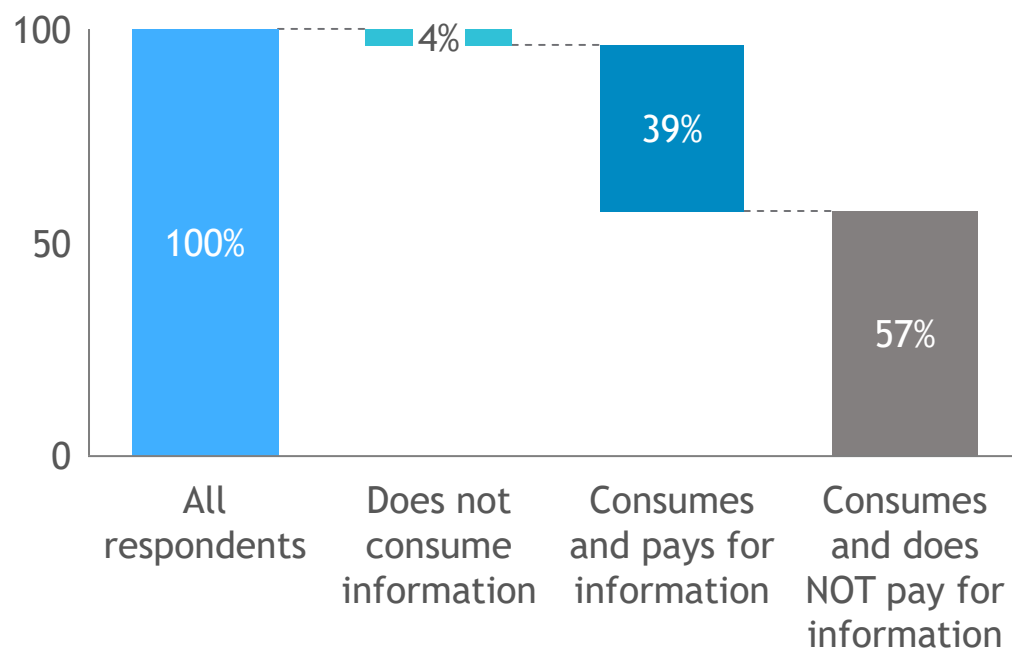
- 1 Over one third of Coloradans are paying for news
 - Large variance in subscription rates reported by respondents
 - 40% of respondents expect to pay the same amount in the future for news that they pay currently
- 2 Paying consumers identify as primarily paying for non-digital, only one third of respondents or less pay for some digital outlet
- 3 Payment divide is strongly correlated to age—older audiences more likely to pay, younger audiences more likely to consume and not
 - Willingness to pay for news increases 2.7x from ages 18-24 to peak ages (55-64)
- 4 The most preferred format by those paying for local news is non-digital—watching TV (45%)
- 5 Coloradans who are digitally savvy are 53% more likely to consume and not pay consume and pay
 - Paying consumers present as older (45+) and digitally dormant
- 6 When paying for a news outlet, the most important attribute to Coloradans is that it helps them to stay informed and be a better citizen
 - Entertainment, comprehensive/relevant topic coverage are also top attributes
- 7 Consumers that pay primarily pay because of exclusive subscribers benefits (26%) or bundled content (24%)
 - Subscribers paying for CO news are 75% more likely to cite news relevance to their community as a reason for paying
 - Younger (18-44) and older (45+) audiences have substantially disparate payment reasons
 - All respondents paying for news most motivated to learn about things that impact their life
 - For those that consume but do not pay main reason because they can get the content for free elsewhere (81%)
- 8 All respondents paying for news rank gov't and political news as the most important topic



Over one third of Coloradans are paying for news

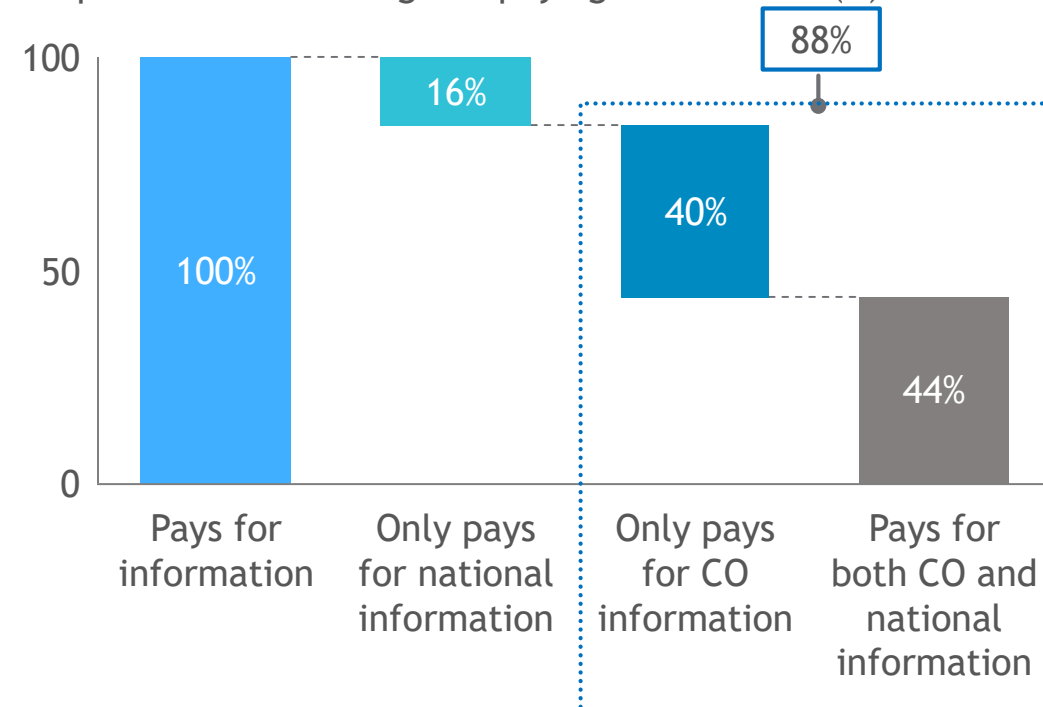
39% of respondents pay for news ...

Respondents consuming and paying for news (%)



... and of those who pay for information 88% pay for Colorado news in some way

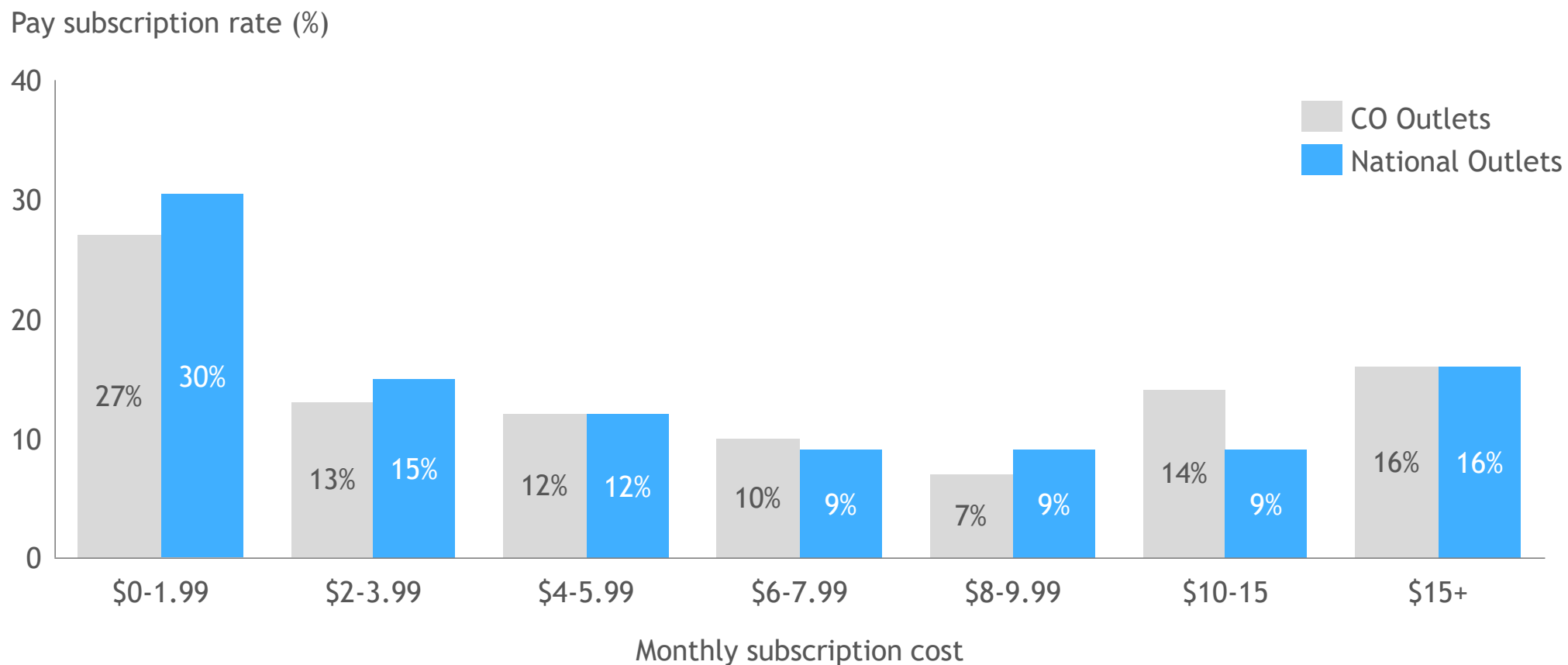
Respondents consuming and paying for CO news (%)



Survey question

Of the information outlets you are aware of, what is your level of consumption for each?

Subscription rates vary widely across those paying for news



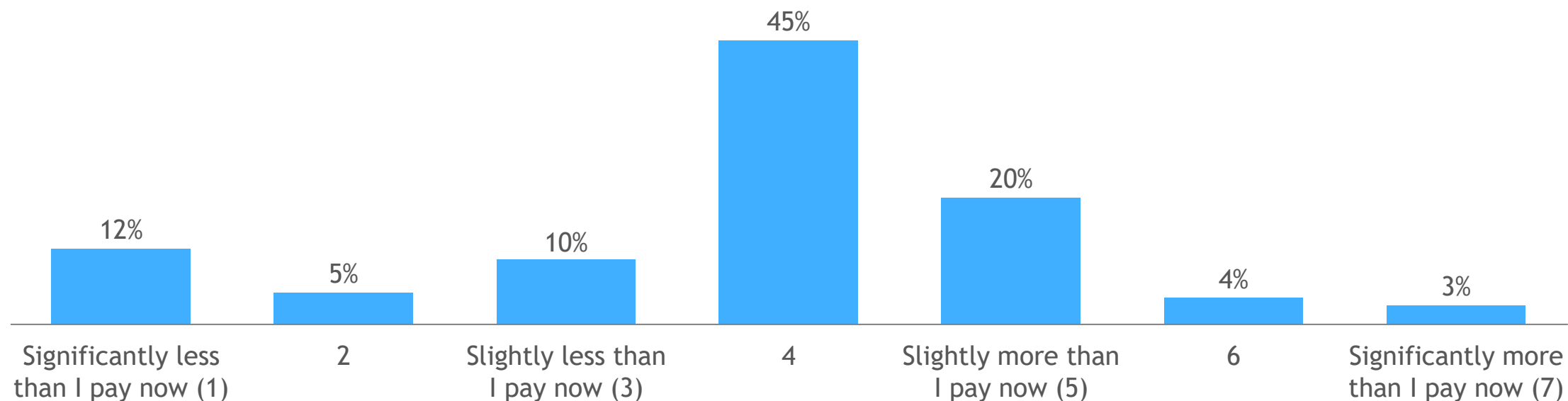
Survey question

For the information outlets you pay for, how much do you pay per month?



Coloradans do not anticipate any major changes in future news spend

Expectation to pay in future for news (%)

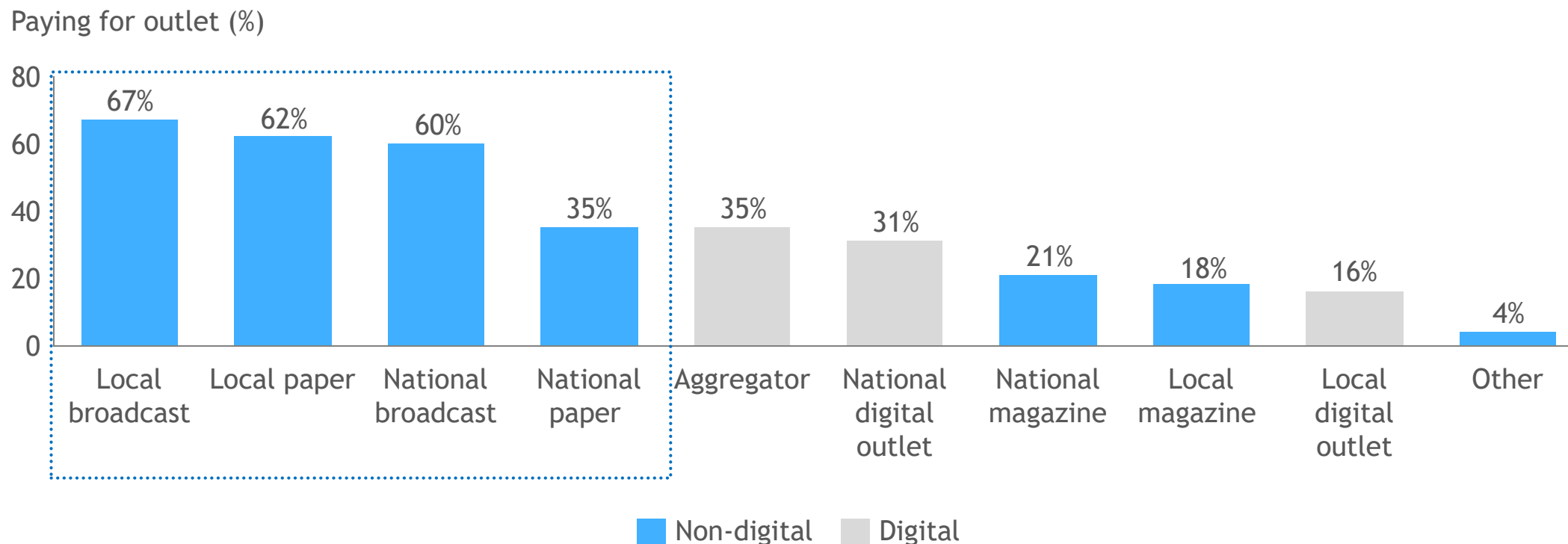


Survey question

In the future, how much do you expect to pay for information based on increasing/decreasing consumption habits?



Paying consumers identify as primarily paying for non-digital outlets, one third of less of respondents pay for some digital outlet

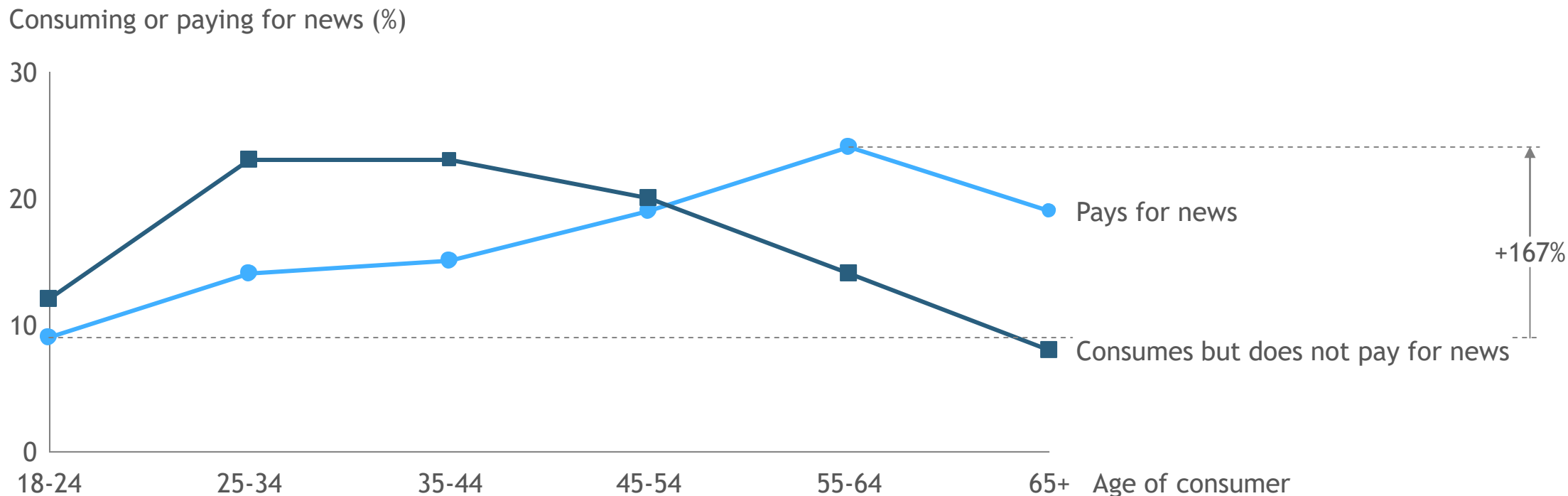


Survey question

Across all topics, which information sources do you use? (Select all that apply)

Payment divide is strongly correlated to age: older audiences more likely to pay, younger audiences more likely to consume and not pay

Increase in willingness to pay for news increases 167% from ages 18-24 to peak ages (55-64) of payment



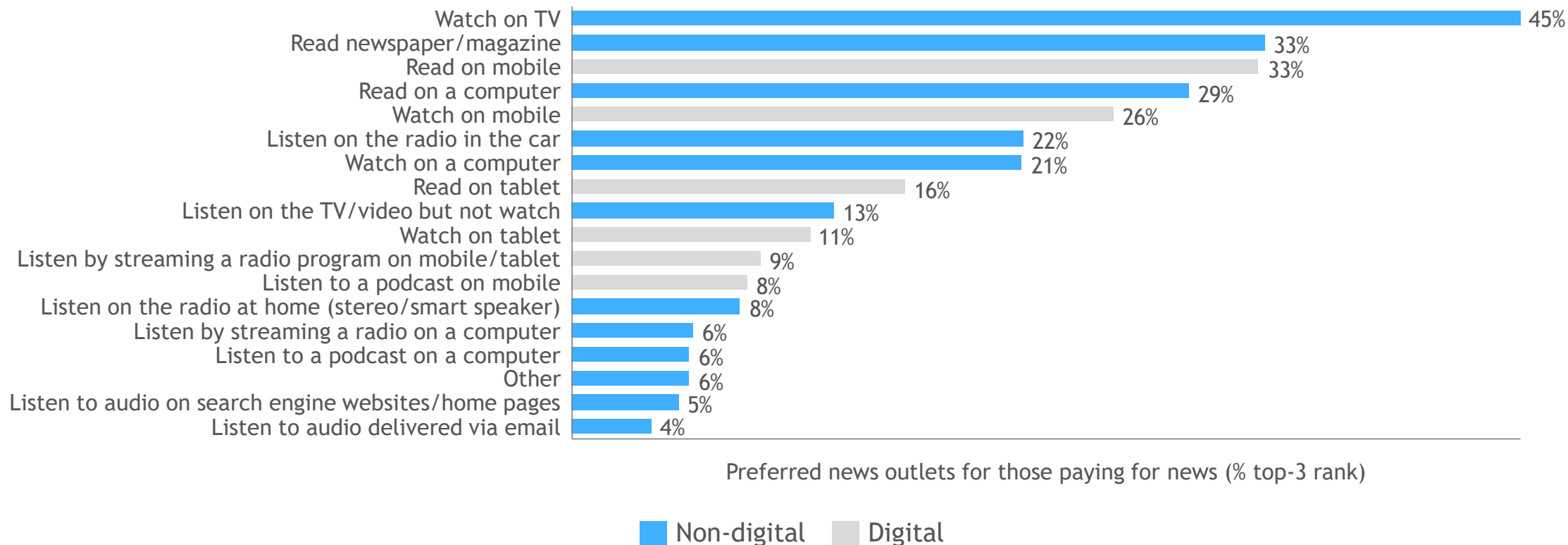
Survey question

Of the information outlets you are aware of, what is your level of consumption for each?



The most preferred (45%) format by those paying for local news is TV

33% of respondents paying for local news rank reading on mobile as their most preferred format



Survey question

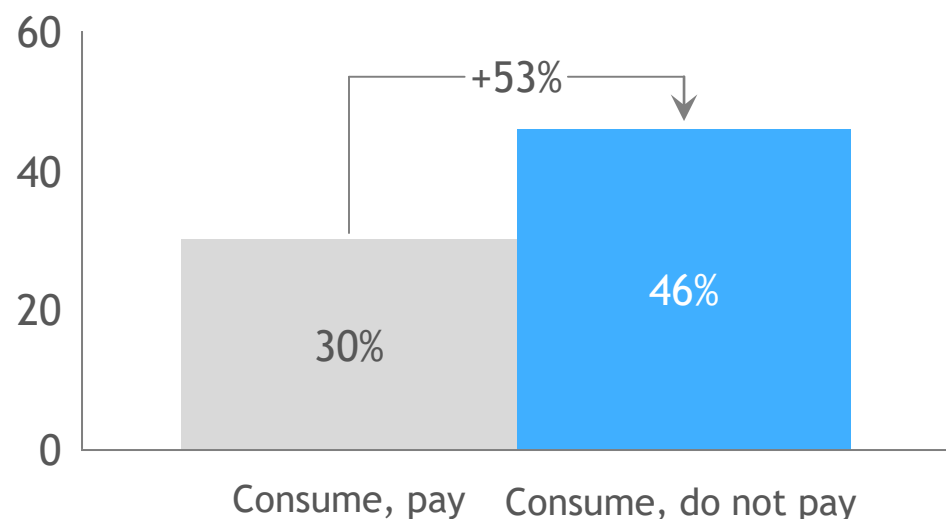
Thinking about paying for local information, please rank which information formats you would be most likely to pay for:



Digitally savvy users are significantly more likely to consume, but relatively less likely to pay for what they consume

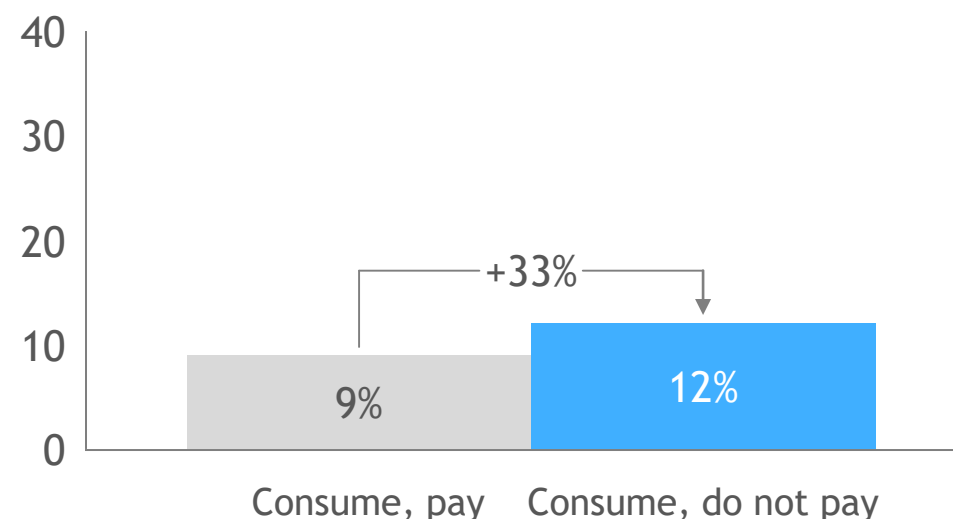
Digitally savvy respondents have a willingness to pay divide of 53%

Digitally Savvy



Digitally dormant willingness to pay divide is much smaller (33%) than digitally savvy's payment divide

Digitally Dormant



Survey question

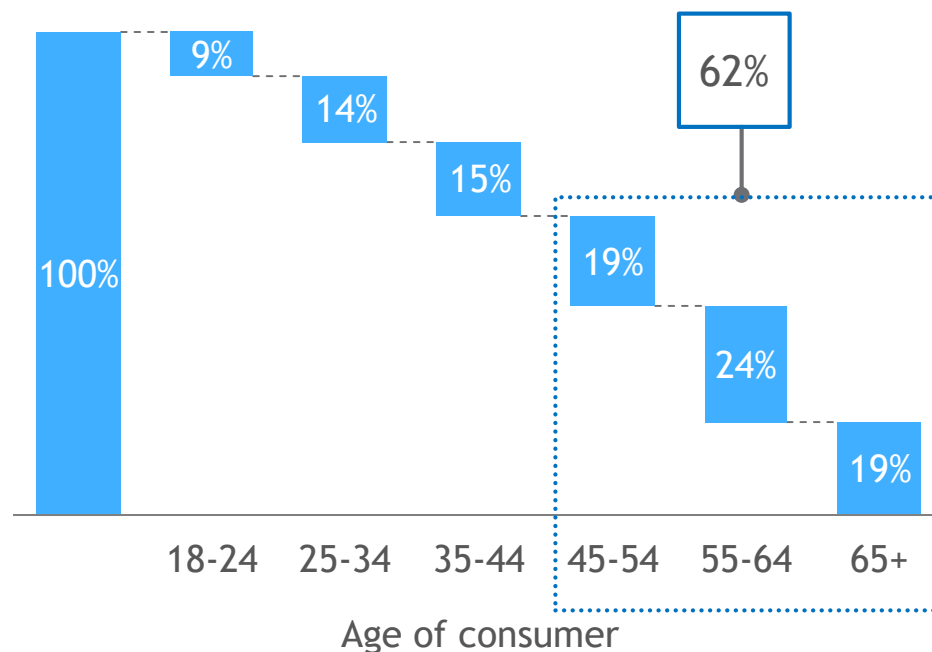
Of the information outlets you are aware of, what is your level of consumption for each?



Paying consumers present as older (45+) and digitally dormant

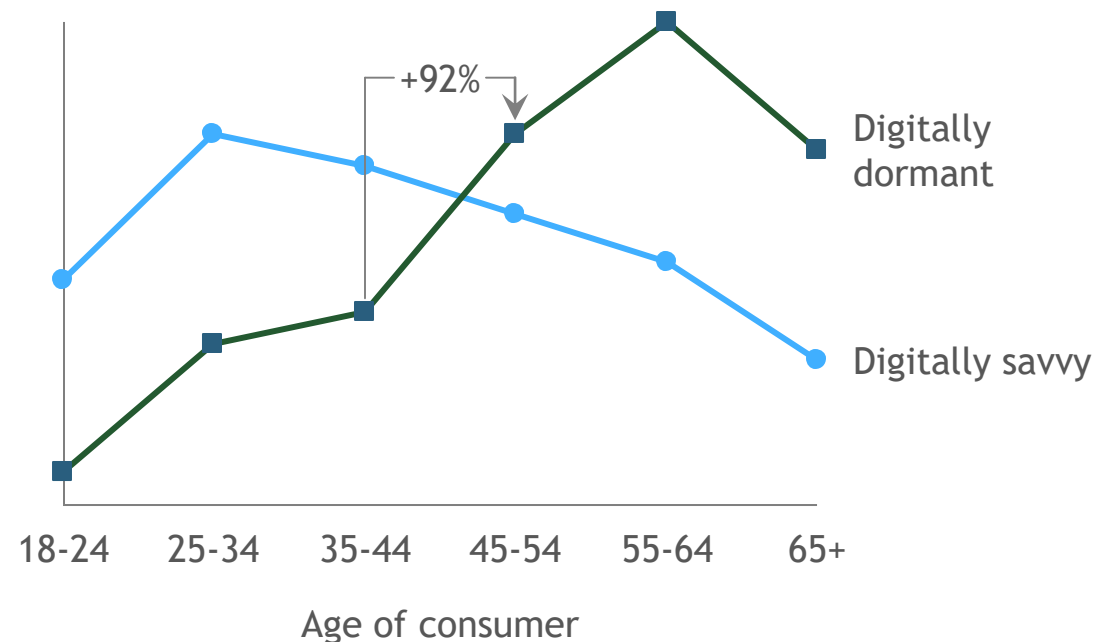
62% of paying consumers are aged 45 or older

Consumers paying for news (%)



Digital dormancy increases significantly (92%) between the ages of 35-44 and 45-54

Consuming news (%)

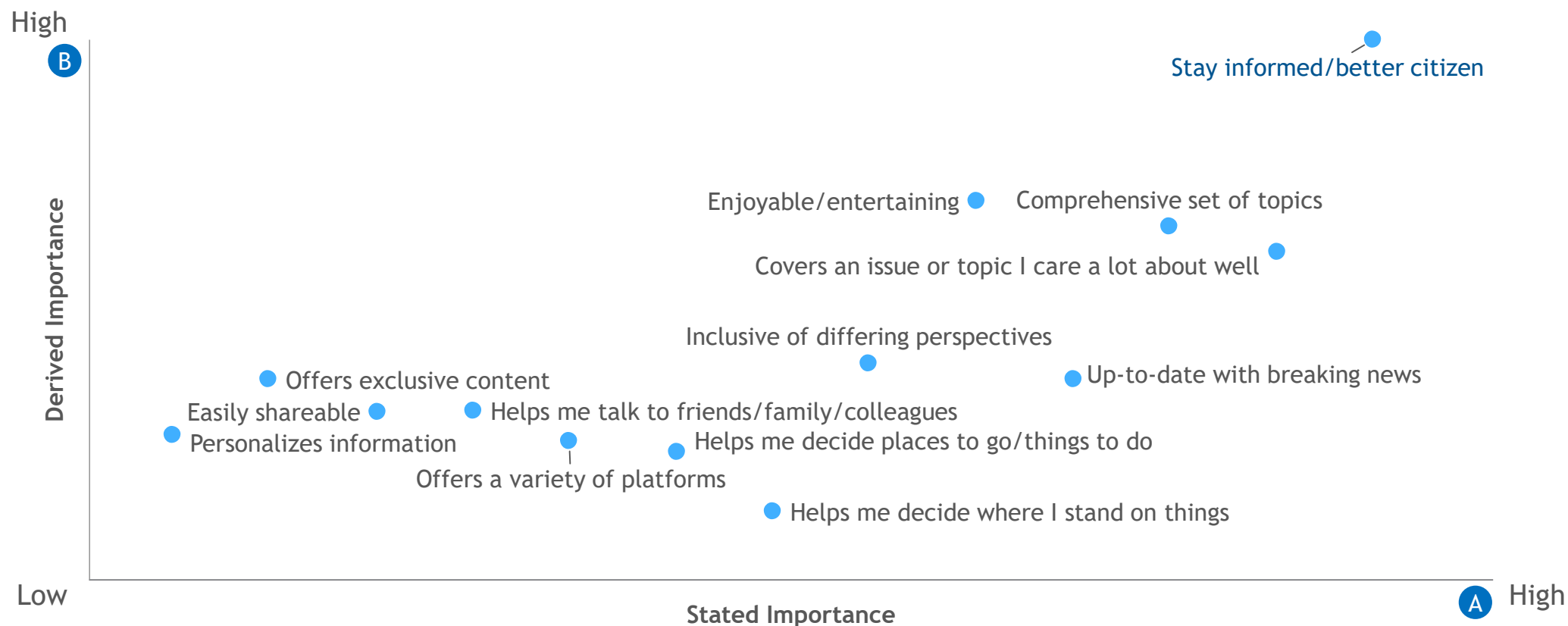


Survey question

Of the information outlets you are aware of, what is your level of consumption for each?



When paying for a news outlet, the most important attribute to Coloradans is that it helps them to stay informed and be a better citizen



Survey
question

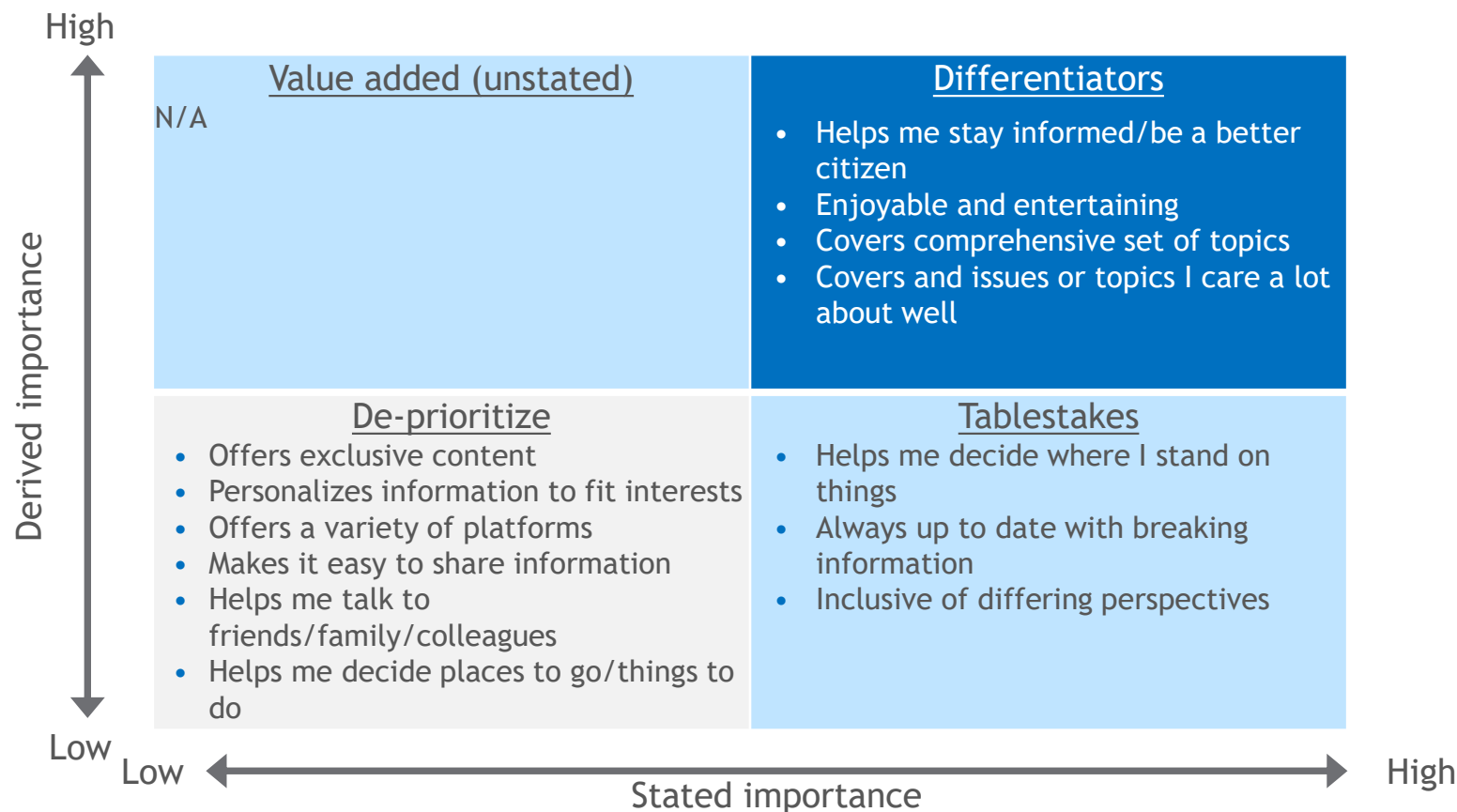
A
B

How important are the following attributes to you in choosing the information outlet you paid for?

Across all of the outlets that you pay for, how satisfied were you with each of the following attributes?



Coloradans also seek news that is entertaining, comprehensive and covers topics they care about



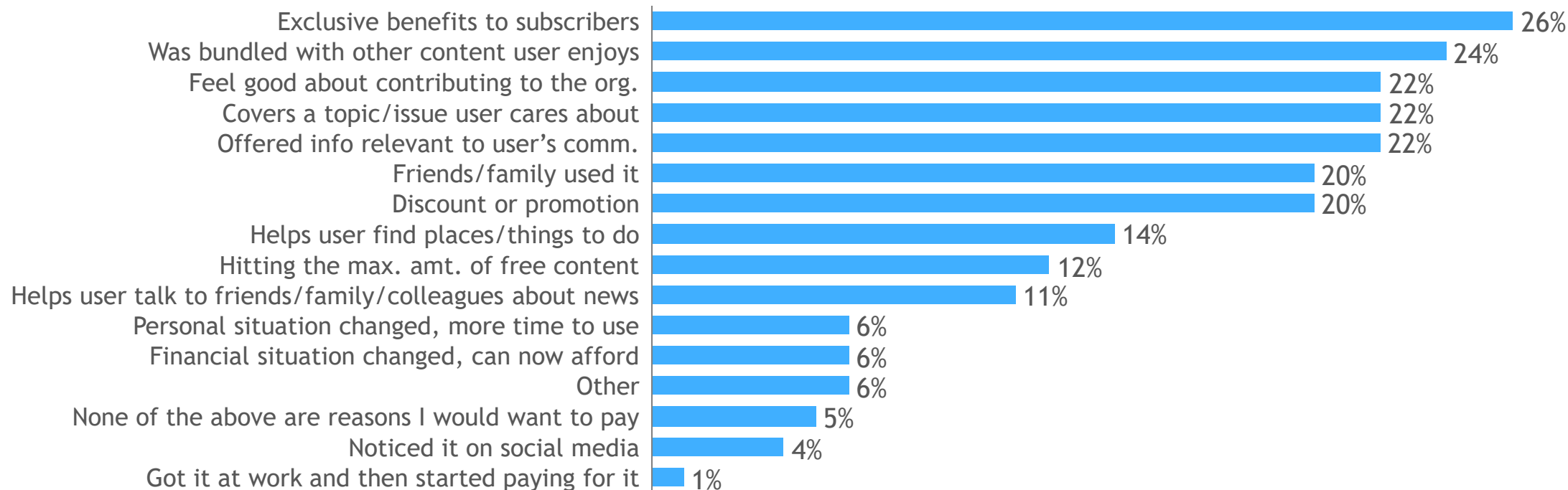
Survey question

- How important are the following attributes to you in choosing the information outlet you paid for?
- For the following outlets you indicated paying for, how satisfied were you with your OVERALL experience?
- Across all of the outlets that you pay for, how satisfied were you with each of the following attributes?



Consumers that pay do so primarily because of exclusive subscribers benefits (26%) or bundled content (24%)

Over one fifth of paying users pay because the outlet offered information relevant to their community



Paying respondents selected as payment reason (%)

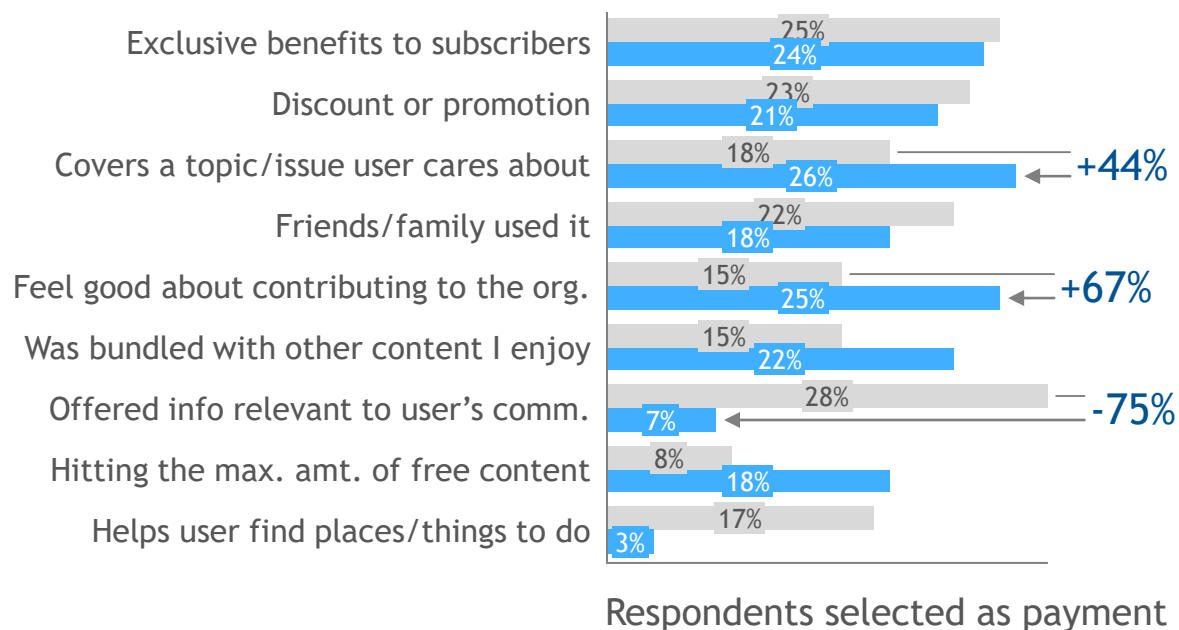
Survey question

For the information outlets you pay for, what are the main reasons you pay for these? (Select all that apply)



Subscribers paying for CO news are 75% more likely to cite news relevance to their community as a reason for paying

Strong divides in payment reason depending on whether respondent pays for CO news or nat'l news



Payment reasons for nat'l news subscribers are feeling good about contributing and topic coverage

- Subscribers paying for national news differing motivations
 - 67% more likely to subscribe because they feel good about contributing to the organization
 - 44% more likely to subscribe if the outlet covers a topic/issue the user cares about

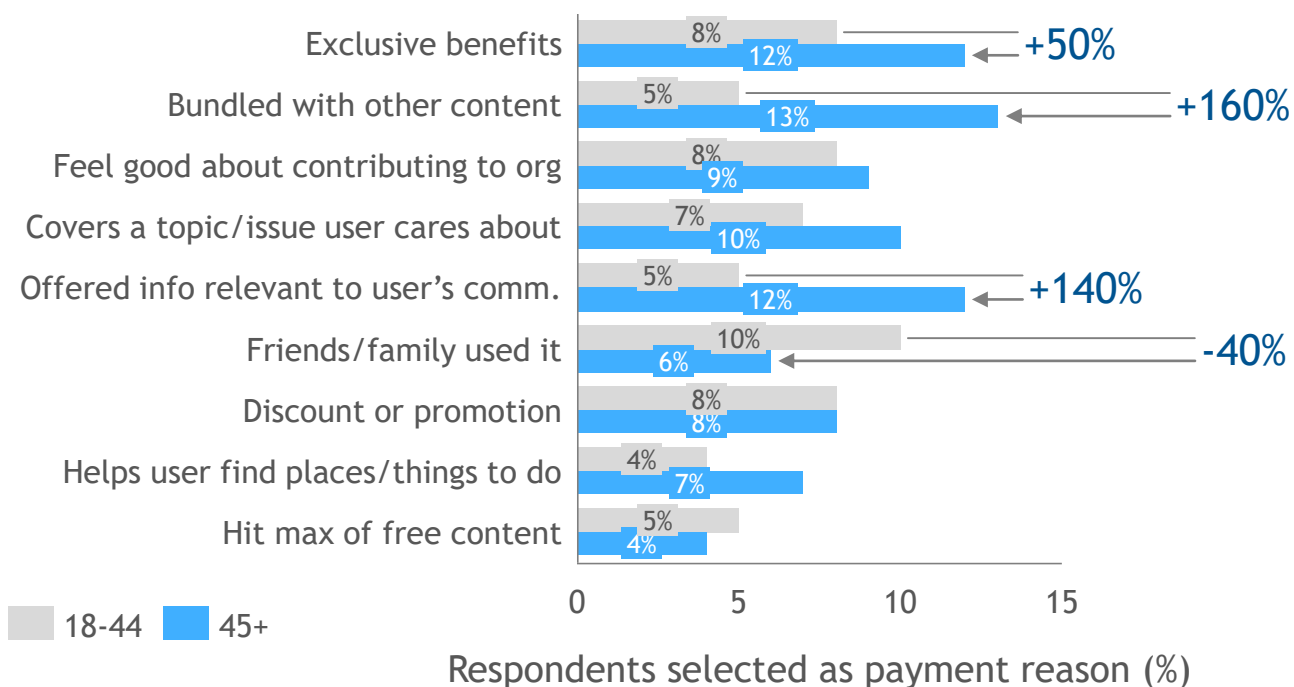
Survey question

For the information outlets you pay for, what are the main reasons you pay for these? (Select all that apply)



Younger (18-44) and older (45+) audiences have substantially disparate payment reasons

Subscription reasons by age



Younger and older audiences have different reasons they subscribe to news outlets

- Younger (18-44) subscribers 40% more likely to be motivated by friends and family using the outlet (10%)
- Older (45+) subscribers motivated to pay by:
 - Bundled content (13%)
 - Exclusive subscriber benefits (12%)
 - The outlet offered information relevant to the user's community

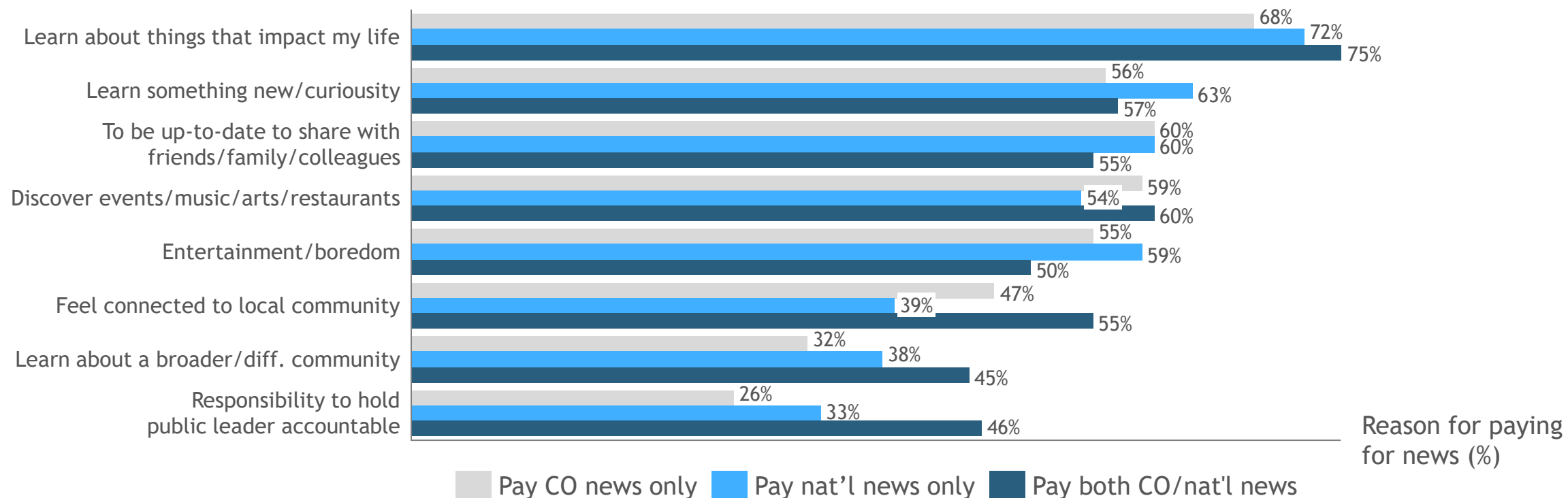
Survey question

For the information outlets you pay for, what are the main reasons you pay for these? (Select all that apply)



All respondents paying for news are most motivated by learning about things that impact their life

Those paying for nat'l news only more motivated by learning something new (63%), those consuming both CO and nat'l news more motivated by discovery (60%) and feeling connected to local community (55%)



Survey question

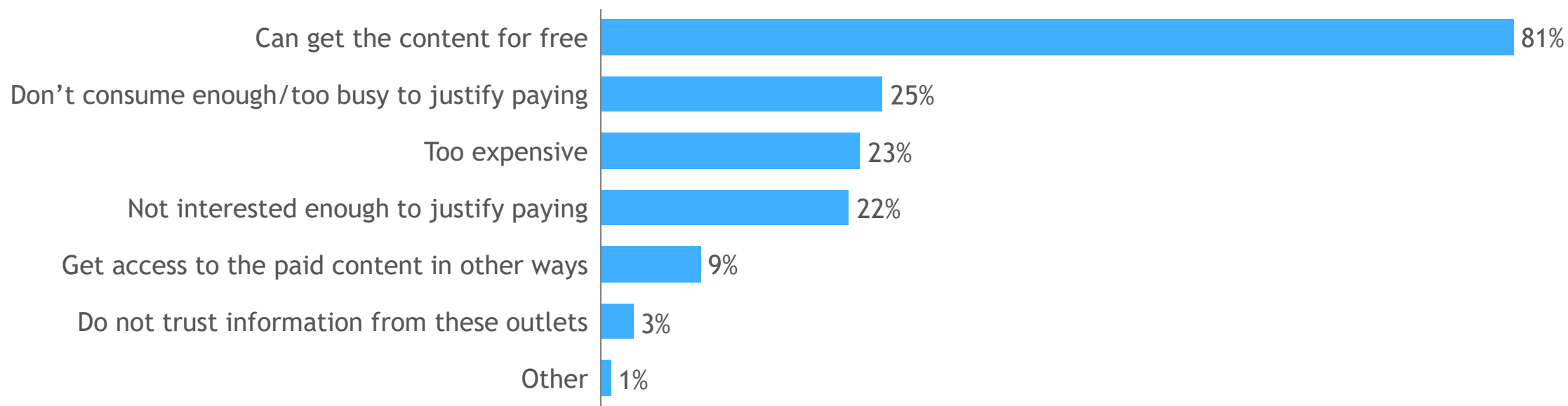
What are your motivations for consuming published content and information? (Select all that apply)



For those that consume but do not pay main reason cited is that they can get the content for free elsewhere (81%)

Nearly one quarter of respondents consume but do not pay for news because they don't consume enough to justify paying (25%), it's too expensive (23%) or they're not interested enough to justify paying (22%)

Consume and do not pay reasons



Respondents non-payment reason (%)

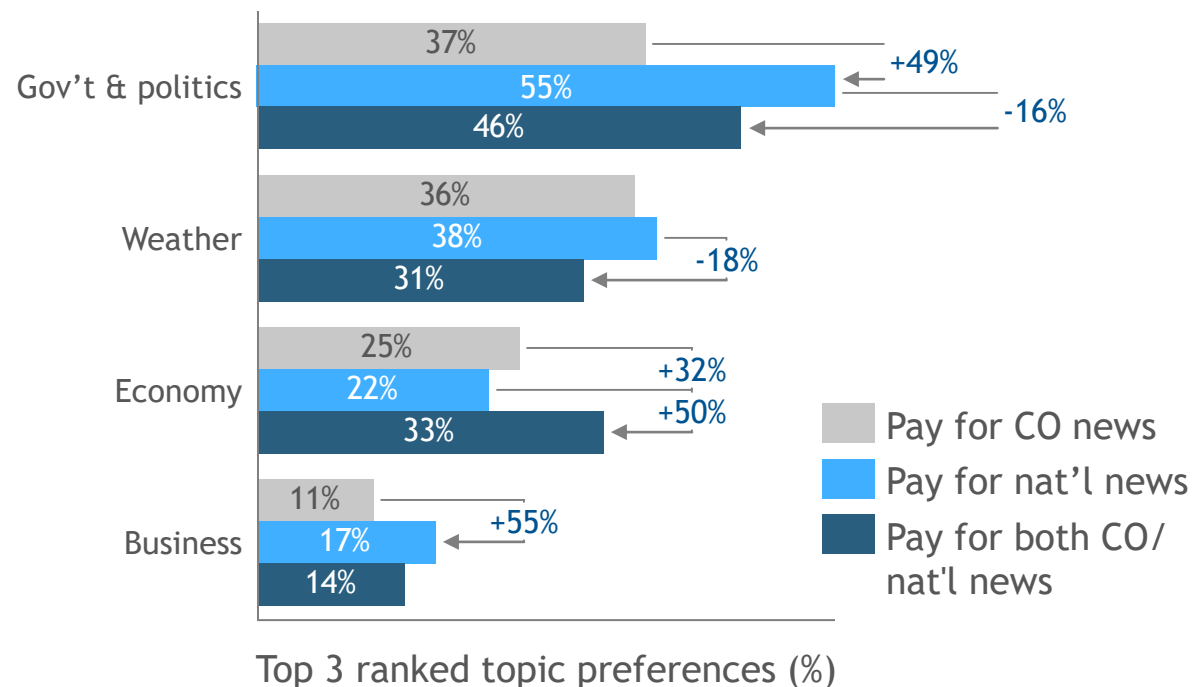
Survey question

For the information outlets you do not pay for, what are the main reasons you do not pay?



All respondents paying for news rank gov't and political news as the most important topic

Topic preference by type of outlet pay for



National news consumers have stronger preferences for specific topic areas

- Users paying for national news have higher preference for:
 - Government and politics
 - Weather
 - Business
- Users paying for both CO and national news have a higher preference for economic news

Survey question

Of the topics that you typically consume, please rank them in order of importance to you

