

LEE ENTERPRISES AUDIENCE REPORT

JAN 2015 – JUN 2015



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Methodology

HOW: Telephone Survey

WHO: Randomly Selected Adults In Billings NDM

WHEN: January 2015 – June 2015

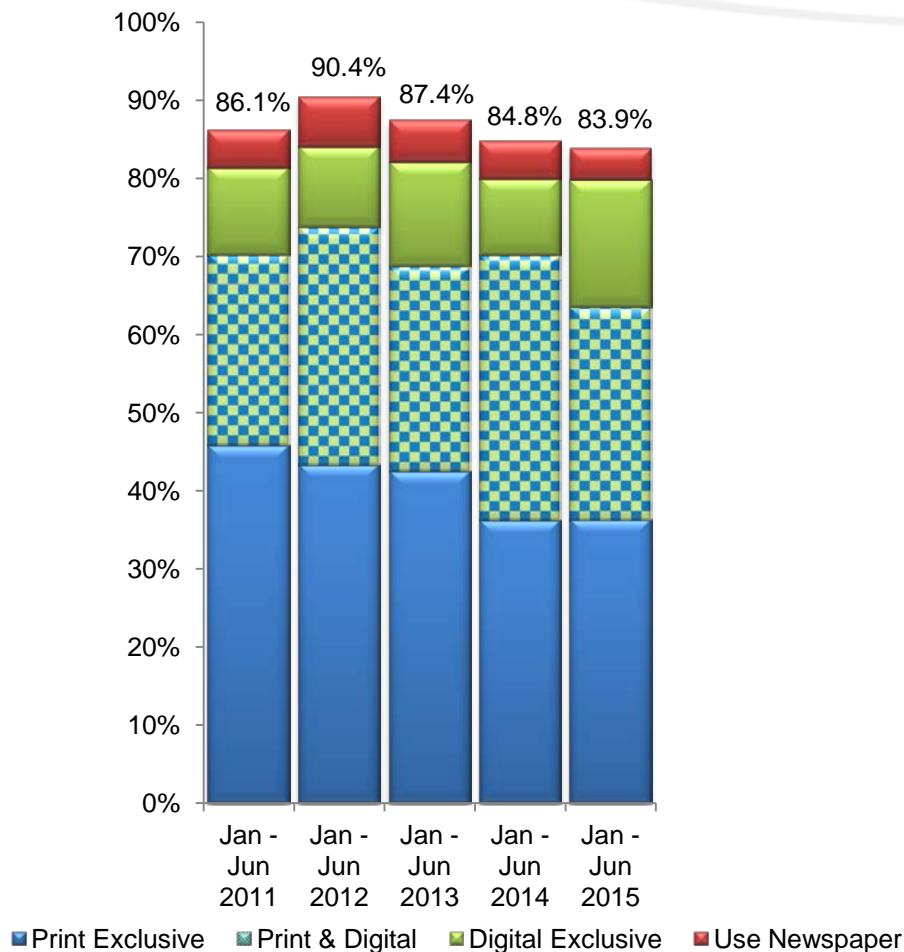
CONDUCTED BY: Thoroughbred Research, Louisville, KY

SAMPLE SIZE: 502 Total Interviews of Adults 18+

MARGIN OF ERROR: Total Sample (n=502) +/- 4.4% Points
Total Internet Sample (n=373) +/- 5.1% Points

Print + Digital Reach

Q: Have you accessed the Billings Gazette digitally, read or used The Billings Gazette or done both in the past 7 days?



	Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Print Exclusive	49.7%	45.9%	45.8%	43.3%	42.5%	36.2%	36.3%
Digital Exclusive	8.4%	12.6%	11.2%	10.4%	13.4%	9.8%	16.3%
Print & Digital	25.0%	24.8%	24.4%	30.4%	26.2%	34.0%	27.2%
Use Newspaper	-	6.0%	4.7%	6.3%	5.3%	4.8%	4.1%
Total Reach	83.1%	89.3%	86.1%	90.4%	87.4%	84.8%	83.9%

Base: All Adults

(n=600)

(n=600)

(n=600)

(n=603)

(n=600)

(n=601)

(n=502)

Margin of Error:

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

+/- 4.4% Points

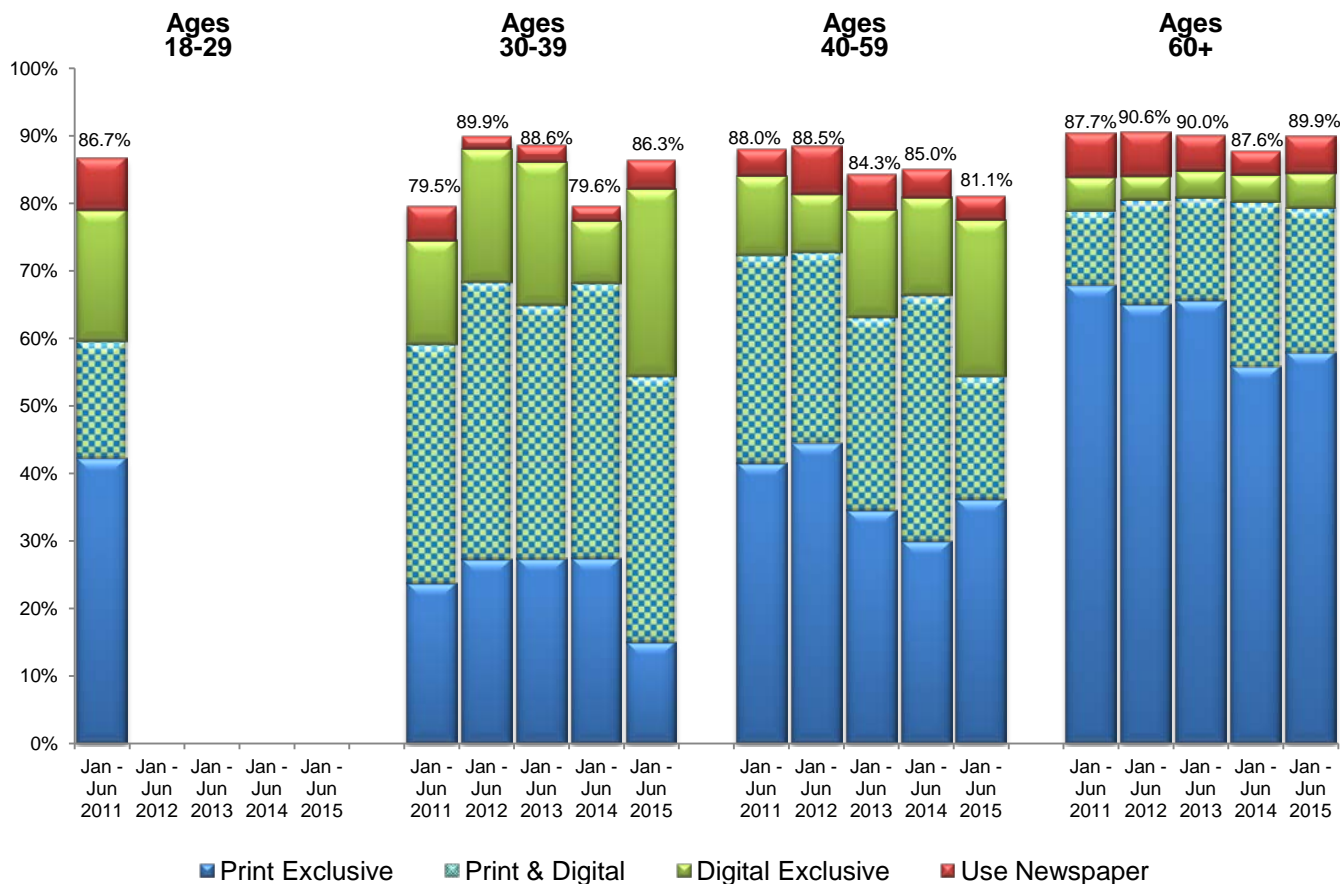
(Print = Read Print Past 7 Days, Digital = Visited Fixed Website, Mobile Website, Or Mobile App Past 7 Days)

Note: When Adults that 'use' the newspaper but have not read the printed version or visited the website in the past week are added, the Billings Gazette and its digital products reach % of all adults each week

Starting in 2012, digital readership includes readers from the fixed website, mobile website, and mobile apps.

Print + Digital Reach Across Generations

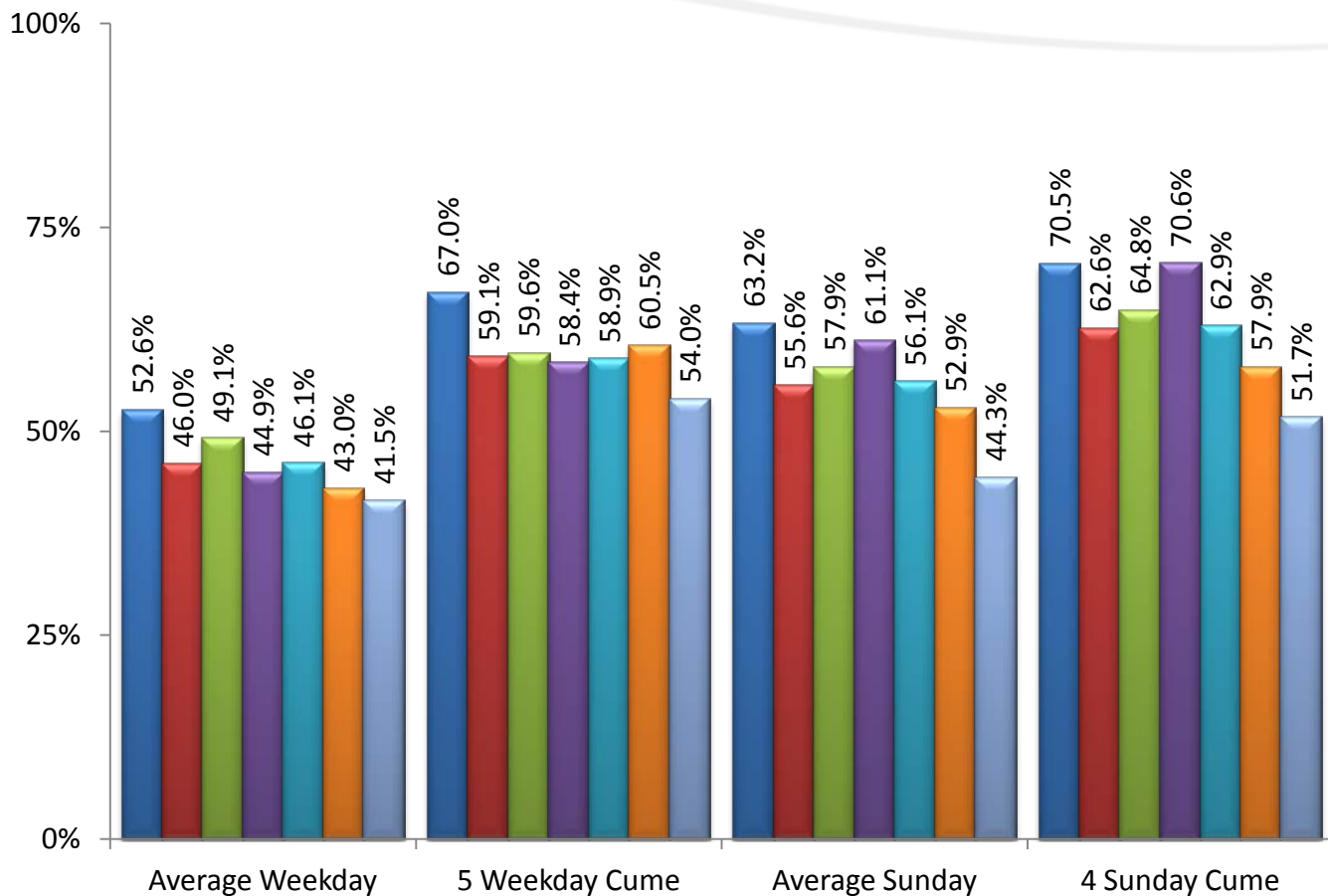
Q: Have you accessed the Billings Gazette digitally, read or used The Billings Gazette or done both in the past 7 days?



Past 7 Days	Ages 18-29	Ages 30-39	Ages 40-59	Ages 60+
Print Exclusive		14.9%	36.1%	57.9%
Digital Exclusive	Sample Size	27.7%	23.2%	5.2%
Print & Digital	Too Small	39.4%	18.2%	21.4%
Use Newspaper		4.3%	3.6%	5.4%
Total Reach		86.3%	81.1%	89.9%
Base:		(n=21)	(n=153)	(n=312)
Margin of Error:		+/- 21.4% Points	+/- 7.9% Points	+/- 5.5% Points

Average Readership

Q: Did you read *The Billings Gazette* yesterday?



■ Jan - Jun 2009 ■ Jan - Jun 2010 ■ Jan - Jun 2011 ■ Jan - Jun 2012 ■ Jan - Jun 2013 ■ Jan - Jun 2014 ■ Jan - Jun 2015

	Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Average Weekday	52.6%	46.0%	49.1%	44.9%	46.1%	43.0%	41.5%
5 Weekday Cume	67.0%	59.1%	59.6%	58.4%	58.9%	60.5%	54.0%
Average Sunday	63.2%	55.6%	57.9%	61.1%	56.1%	52.9%	44.3%
4 Sunday Cume	70.5%	62.6%	64.8%	70.6%	62.9%	57.9%	51.7%

Base: All Adults

(n=600)

(n=600)

(n=600)

(n=603)

(n=600)

(n=601)

(n=502)

Margin of Error:

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

+/- 4.0% Points

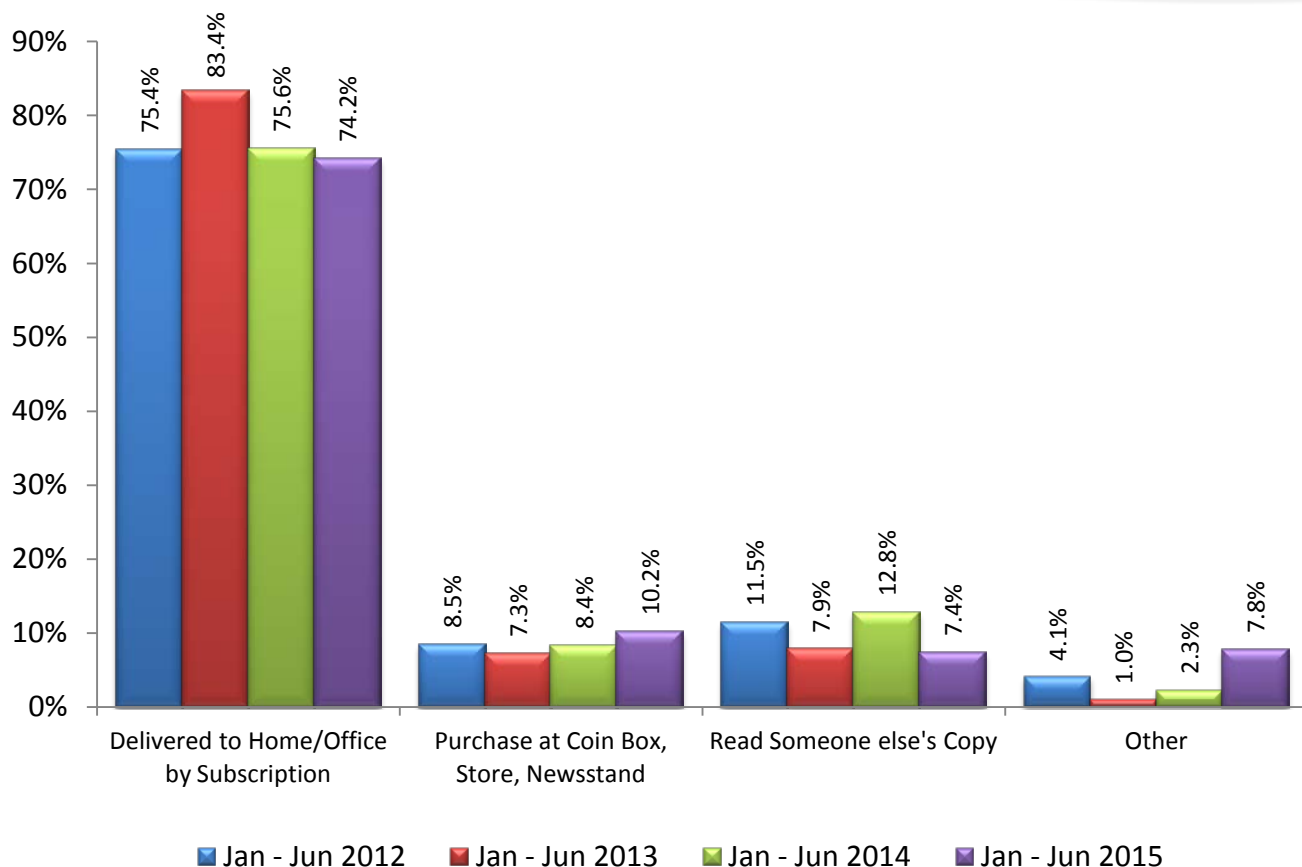
+/- 4.0% Points

+/- 4.0% Points

+/- 4.4% Points

Source of Weekday Newspaper

Q: Where do you usually get your copy of the daily, Monday through Friday, newspaper?



	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Delivered to your home/office by subscription	75.4%	83.4%	75.6%	74.2%
Purchase at coin box, store, or newsstand	8.5%	7.3%	8.4%	10.2%
Read someone else's copy	11.5%	7.9%	12.8%	7.4%
Other	4.1%	1.0%	2.3%	7.8%

Base: Respondents who read, looked at, or used the weekday paper during the past week or were not sure.

Margin of Error:

(n=339)

(n=342)

(n=333)

(n=270)

+/- 5.3% Points

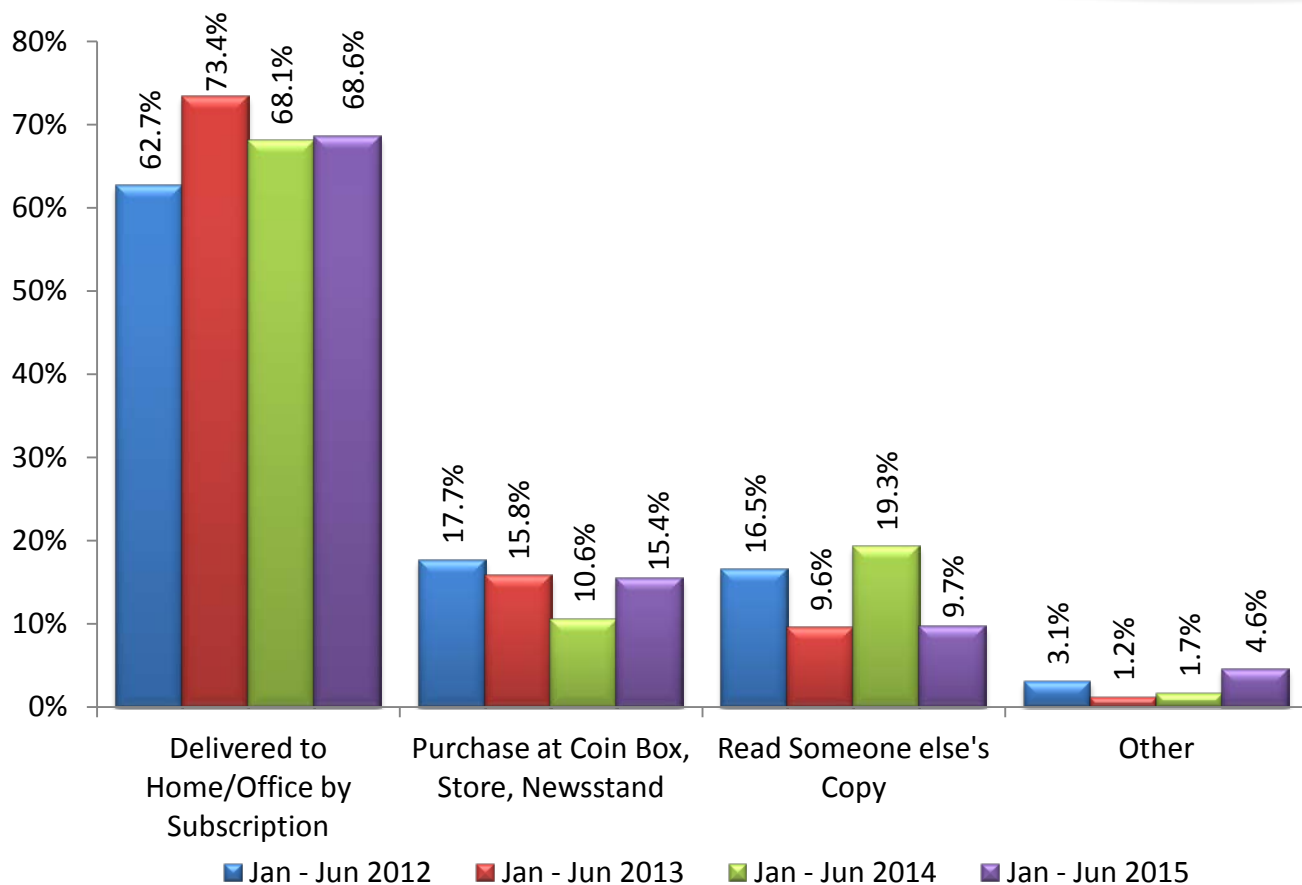
+/- 5.3% Points

+/- 5.4% Points

+/- 6.0% Points

Source of Sunday Newspaper

Q: Where did you get the Sunday newspaper you read or looked into most recently?



	Jan - Jun 2012	Jan - Jun 2013	Jan-Jun 2014	Jan-Jun 2015
Delivered to your home/office by subscription	62.7%	73.4%	68.1%	68.6%
Purchase at coin box, store, or newsstand	17.7%	15.8%	10.6%	15.4%
Read someone else's copy	16.5%	9.6%	19.3%	9.7%
Other	3.1%	1.2%	1.7%	4.6%

Base: Respondents who read, looked at, or used the Sunday paper during the past four weeks or were not sure.

Margin of Error:

(n=441)

(n=411)

(n=403)

(n=332)

+/- 4.7% Points

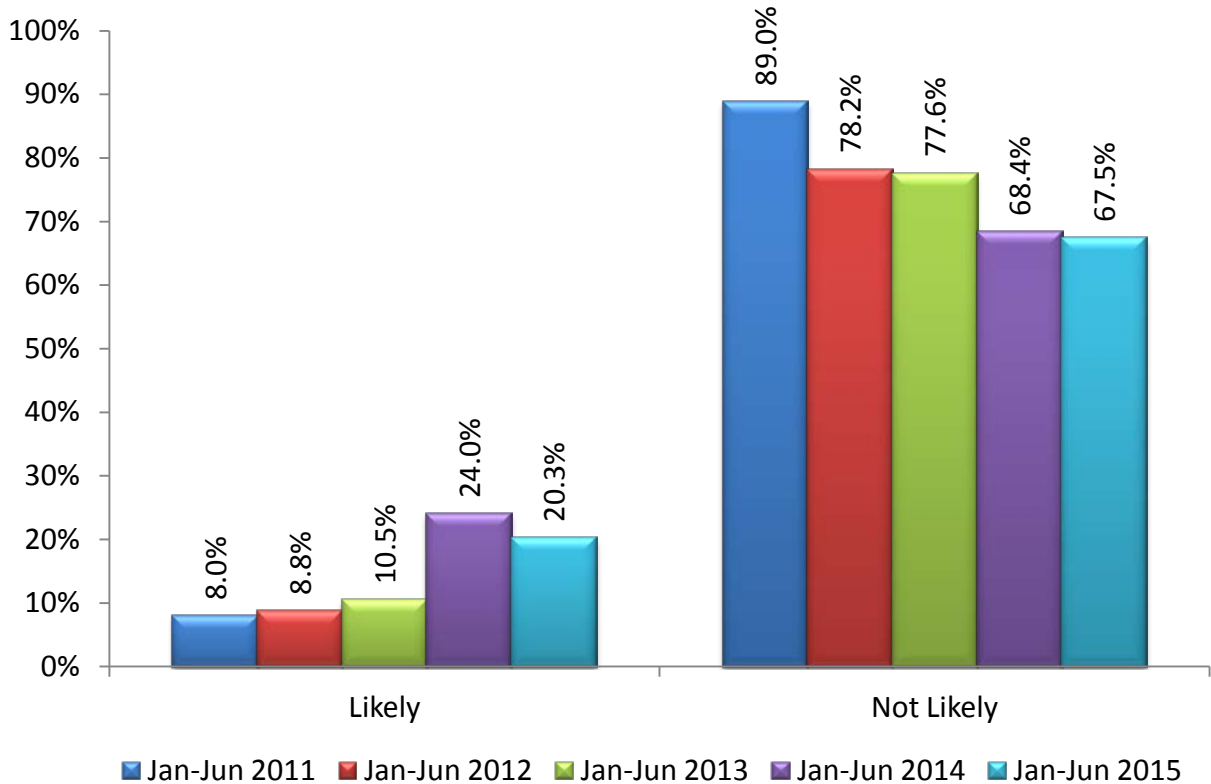
+/- 4.8% Points

+/- 4.9% Points

+/- 5.4% Points

Likelihood of Discontinuing Print Readership

Q: You identified yourself as a person who reads The Billings Gazette both in print and online. How likely are you to stop reading the printed version in the next six months?



	Jan-Jun 2011	Jan-Jun 2012	Jan-Jun 2013	Jan-Jun 2014	Jan-Jun 2015
Likely	8.0%	8.8%	10.5%	24.0%	20.3%
Not Likely	89.0%	78.2%	77.6%	68.4%	67.5%
Base: Adults who read both in print and online	(n=119)	(n=121)	(n=123)	(n=144)	(n=110)
Margin of Error:	+/-9.0% Points	+/-8.9% Points	+/-8.8% Points	+/-8.2% Points	+/-9.3% Points

Print + Digital Demographics

Q: Have you accessed Billings Gazette digitally, read or used The Billings Gazette or done both in the past 7 days?

Jan – Jun 2015	Market	Print Exclusive	Digital Exclusive	Print & Digital	Use Newspaper	None
Male	49.0%	48.3%	61.9%	40.9%	40.4%	53.3%
Female	51.0%	51.7%	38.1%	59.1%	59.6%	46.7%
Ages 8-29	9.2%	2.6%	0.0%	21.5%	0.0%	15.1%
Ages 30-39	17.6%	7.2%	29.6%	25.7%	19.1%	15.1%
Ages 40-59	43.4%	42.9%	61.0%	29.3%	40.3%	50.8%
Ages 60+	29.8%	47.3%	9.4%	23.6%	40.6%	18.9%
<i>Median Age</i>	<i>55.1</i>	<i>58.6</i>	<i>42.5</i>	<i>47.2</i>	<i>54.3</i>	<i>43.7</i>
Children Under 18 at home	36.9%	27.3%	58.0%	31.5%	27.5%	48.6%
Lived In Area Less Than Five Years	11.1%	5.9%	10.6%	12.8%	28.7%	16.1%
6 - 10 Years	18.1%	12.8%	19.0%	20.0%	1.5%	30.5%
11 - 14 Years	6.3%	8.2%	4.8%	1.5%	7.0%	11.0%
15 - 20 Years	17.1%	8.4%	19.9%	23.3%	29.0%	20.4%
21 Years +	47.3%	64.7%	45.7%	42.3%	33.7%	22.1%
<i>Median Length of Residence</i>	<i>20.1</i>	<i>23.3</i>	<i>19.7</i>	<i>19.0</i>	<i>17.6</i>	<i>12.2</i>
Less than \$35K Household Income	34.7%	37.2%	17.0%	35.2%	81.4%	37.4%
\$35K - \$50K	9.1%	6.4%	7.3%	11.2%	0.0%	14.6%
\$50K - \$75K	20.1%	25.3%	20.1%	14.2%	16.0%	19.8%
\$75K+	36.1%	31.2%	55.6%	39.4%	2.7%	28.2%
<i>Median Household Income (\$000)</i>	<i>59.0</i>	<i>56.3</i>	<i>110.4</i>	<i>56.2</i>	<i>17.7</i>	<i>47.9</i>
High School Grad or Less	29.2%	35.0%	13.4%	24.3%	53.7%	34.4%
Some College	32.5%	31.0%	37.9%	36.4%	36.0%	23.1%
4 Year College or More	28.3%	27.7%	44.1%	23.5%	2.1%	28.4%
Graduate Degree	10.0%	6.3%	4.6%	15.8%	8.1%	14.2%
Base: All Adults	(n=502)	(n=251)	(n=49)	(n=114)	(n=23)	(n=65)
Margin of Error:	+/- 4.4% Points	+/- 6.2% Points	+/- 14.0% Points	+/- 9.2% Points	+/- 20.4% Points	+/- 12.1% Points

Print + Digital Demographics

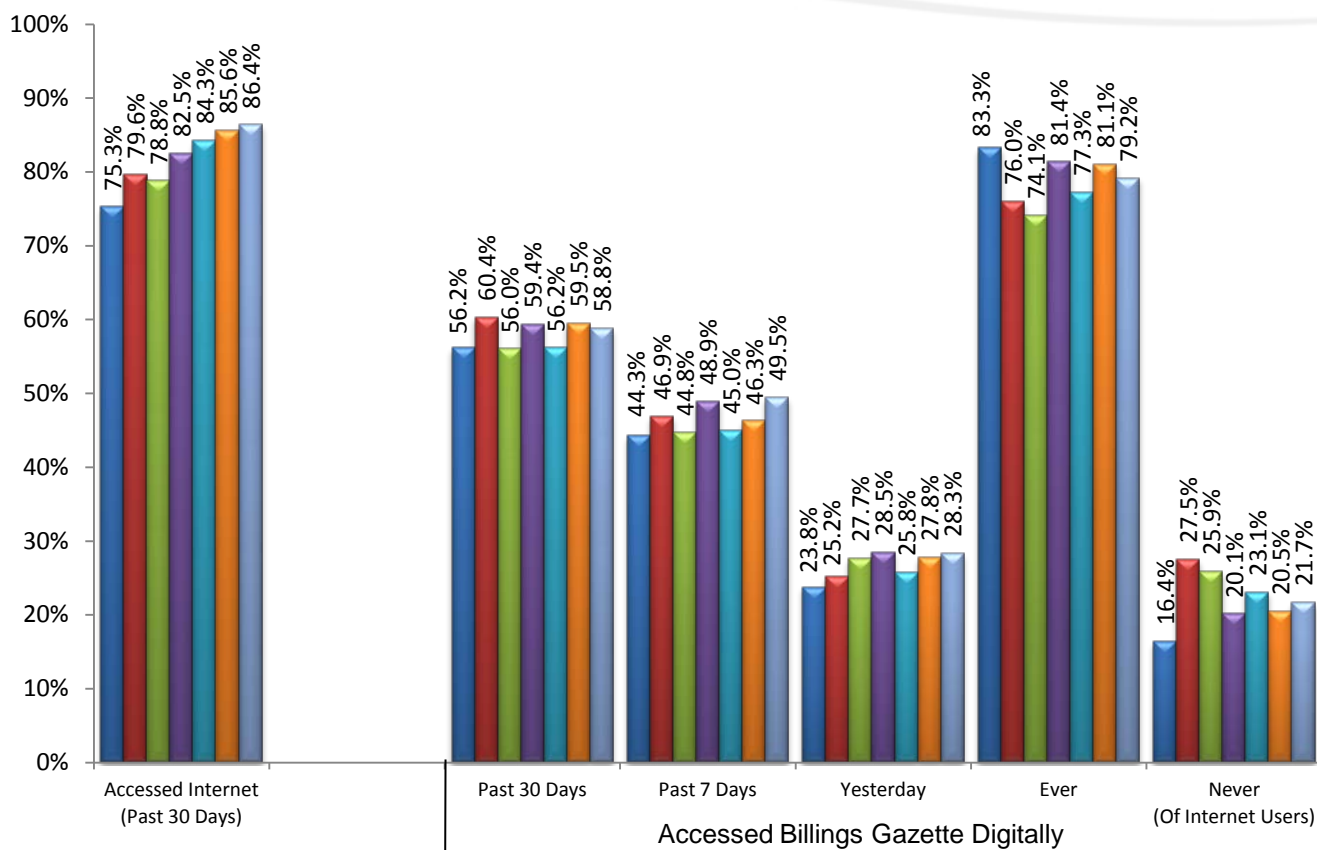
Q: Have you accessed Billings Gazette digitally, read or used The Billings Gazette or done both in the past 7 days?

Jan – Jun 2015	Market	Print Readers	Digital Readers	None
Male	49.0%	45.2%	48.8%	50.7%
Female	51.0%	54.8%	51.2%	49.3%
Ages 8-29	9.2%	10.6%	13.4%	12.2%
Ages 30-39	17.6%	15.1%	27.2%	15.9%
Ages 40-59	43.4%	37.1%	41.3%	48.8%
Ages 60+	29.8%	37.2%	18.2%	23.2%
<i>Median Age</i>	<i>55.1</i>	<i>54.4</i>	<i>42.5</i>	<i>44.2</i>
Children Under 18 at home	36.9%	29.0%	41.6%	44.3%
Lived In Area Less Than Five Years	11.1%	8.9%	12.0%	18.7%
6 - 10 Years	18.1%	15.9%	19.6%	24.6%
11 - 14 Years	6.3%	5.4%	2.8%	10.2%
15 - 20 Years	17.1%	14.8%	22.0%	22.1%
21 Years +	47.3%	55.1%	43.6%	24.4%
<i>Median Length of Residence</i>	<i>20.1</i>	<i>21.9</i>	<i>19.2</i>	<i>13.6</i>
Less than \$35K Household Income	34.7%	36.3%	28.5%	43.8%
\$35K - \$50K	9.1%	8.5%	9.8%	12.5%
\$50K - \$75K	20.1%	20.3%	16.3%	19.2%
\$75K+	36.1%	34.8%	45.4%	24.5%
<i>Median Household Income (\$000)</i>	<i>59.0</i>	<i>81.3</i>	<i>67.9</i>	<i>42.4</i>
High School Grad or Less	29.2%	30.4%	20.2%	38.3%
Some College	32.5%	33.3%	36.9%	25.7%
4 Year College or More	28.3%	25.9%	31.3%	23.1%
Graduate Degree	10.0%	10.4%	11.6%	13.0%
Base: All Adults	(n=502)	(n=365)	(n=163)	(n=88)
Margin of Error:	+/- 4.4% Points	+/- 5.1% Points	+/- 7.7% Points	+/- 10.4% Points

Internet Access & Billingsgazette.com Usage

Q: When was the last time you accessed the Internet?

How about Billingsgazette.com?



■ Jan - Jun 2009 ■ Jan - Jun 2010 ■ Jan - Jun 2011 ■ Jan - Jun 2012 ■ Jan - Jun 2013 ■ Jan - Jun 2014 ■ Jan - Jun 2015

	Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Accessed Internet (Past 30 Days)	75.3%	79.6%	78.8%	82.5%	84.3%	85.6%	86.4%
Accessed Billings Gazette Digital Past 30 Days	56.2%	60.4%	56.0%	59.4%	56.2%	59.5%	58.8%
Accessed Billingsgazette.com Past 7 Days	44.3%	46.9%	44.8%	48.9%	45.0%	46.3%	49.5%
Accessed Billingsgazette.com Yesterday	23.8%	25.2%	27.7%	28.5%	25.8%	27.8%	28.3%
Accessed Billingsgazette.com Ever	83.3%	76.0%	74.1%	81.4%	77.3%	81.1%	79.2%
Never Accessed Billingsgazette.com (Internet Users)	16.4%	27.5%	25.9%	20.1%	23.1%	20.5%	21.7%

Base: Adults who accessed the internet in the past 30 days.

Margin of Error:

(n=410)

+/- 4.8% Points

(n=477)

+/- 4.5% Points

(n=421)

+/- 4.8% Points

(n=428)

+/- 4.7% Points

(n=457)

+/- 4.6% Points

(n=450)

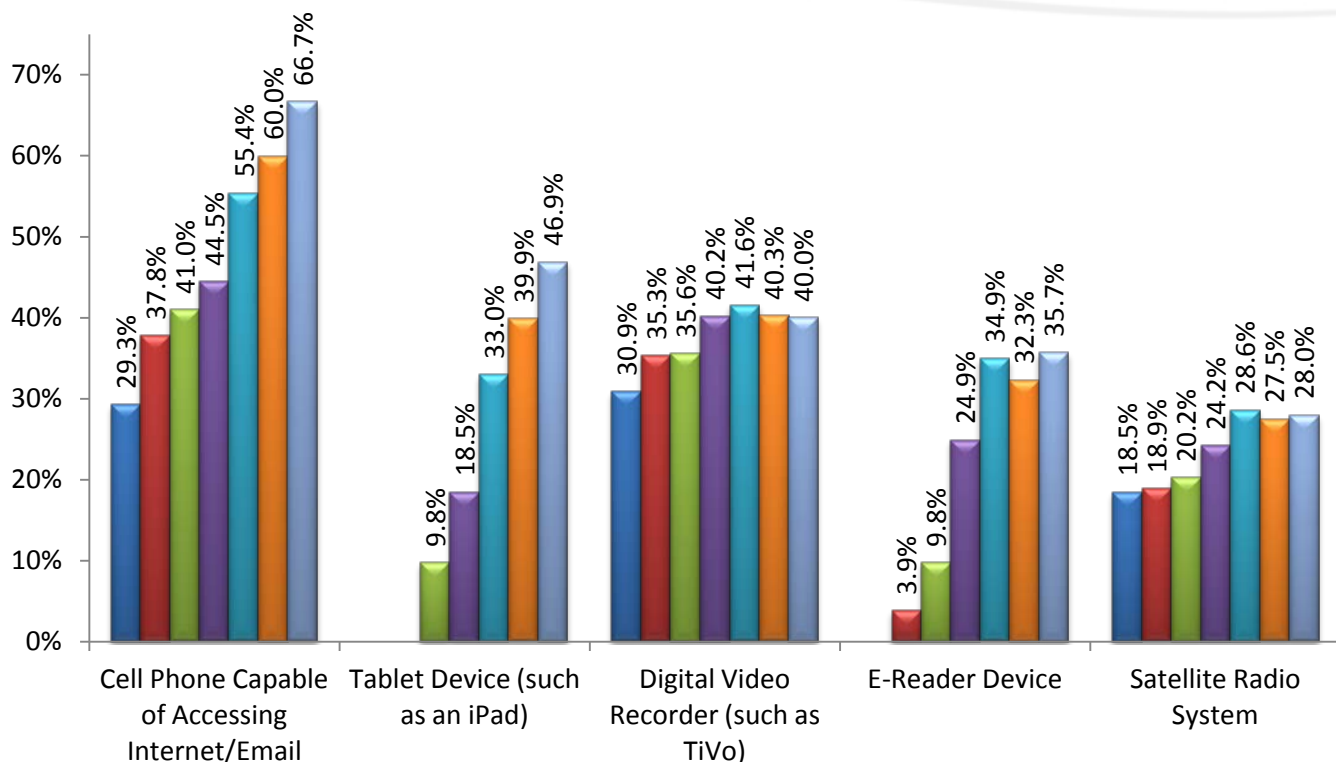
+/- 4.6% Points

(n=373)

+/- 5.1% Points

Technology Device Ownership

Q: Which of the following do you own?



■ Jan - Jun 2009 ■ Jan - Jun 2010 ■ Jan - Jun 2011 ■ Jan - Jun 2012 ■ Jan - Jun 2013 ■ Jan - Jun 2014 ■ Jan - Jun 2015

	Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Cell Phone Capable of Accessing Internet/Email	29.3%	37.8%	41.0%	44.5%	55.4%	60.0%	66.7%
Tablet Device (such as an iPad)	-	-	9.8%	18.5%	33.0%	39.9%	46.9%
Digital Video Recorder (such as TiVo)	30.9%	35.3%	35.6%	40.2%	41.6%	40.3%	40.0%
E-Reader Device	-	3.9%	9.8%	24.9%	34.9%	32.3%	35.7%
Satellite Radio System	18.5%	18.9%	20.2%	24.2%	28.6%	27.5%	28.0%

Base: All Adults

(n=600)
+/- 4.0%
Points

(n=600)
+/- 4.0%
Points

(n=600)
+/- 4.0%
Points

(n=603)
+/- 4.0%
Points

(n=600)
+/- 4.0%
Points

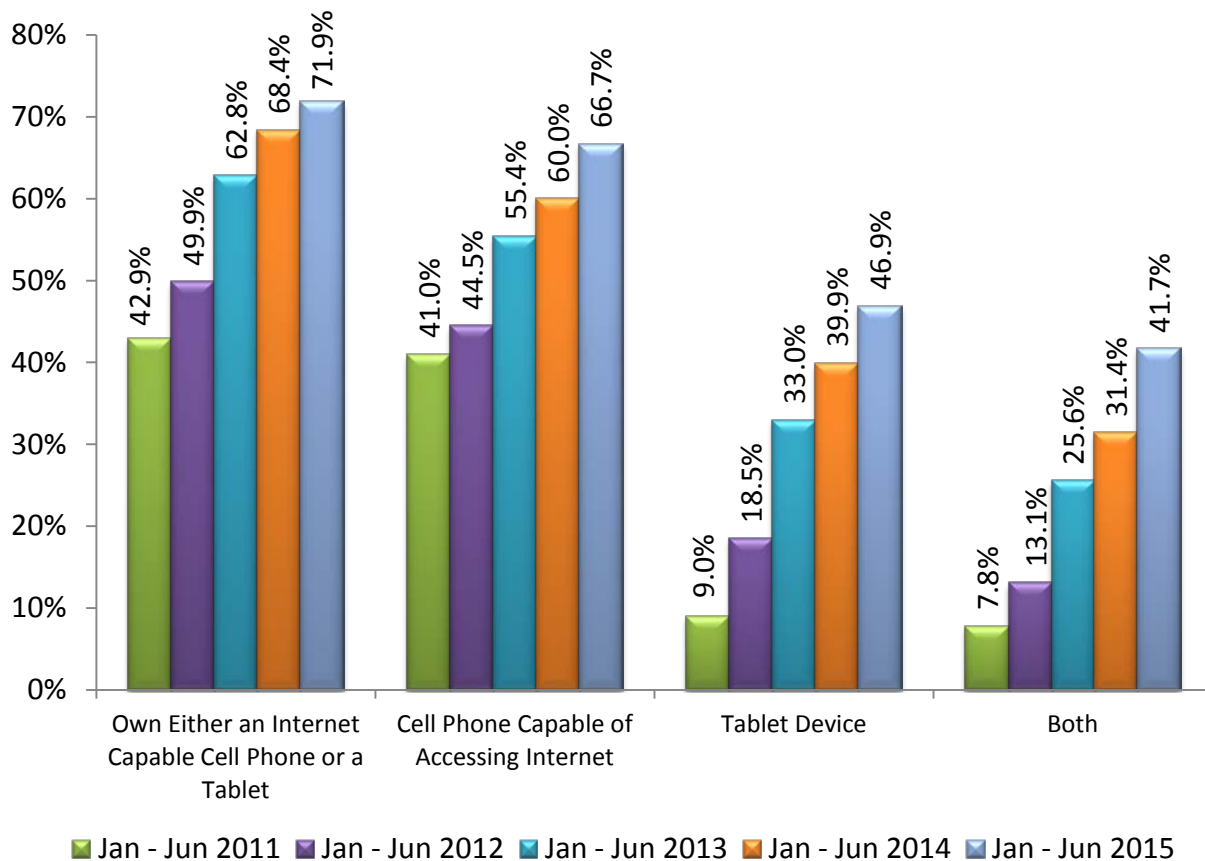
(n=601)
+/- 4.0%
Points

(n=502)
+/- 4.4%
Points

Margin of Error:

Mobile Device Ownership

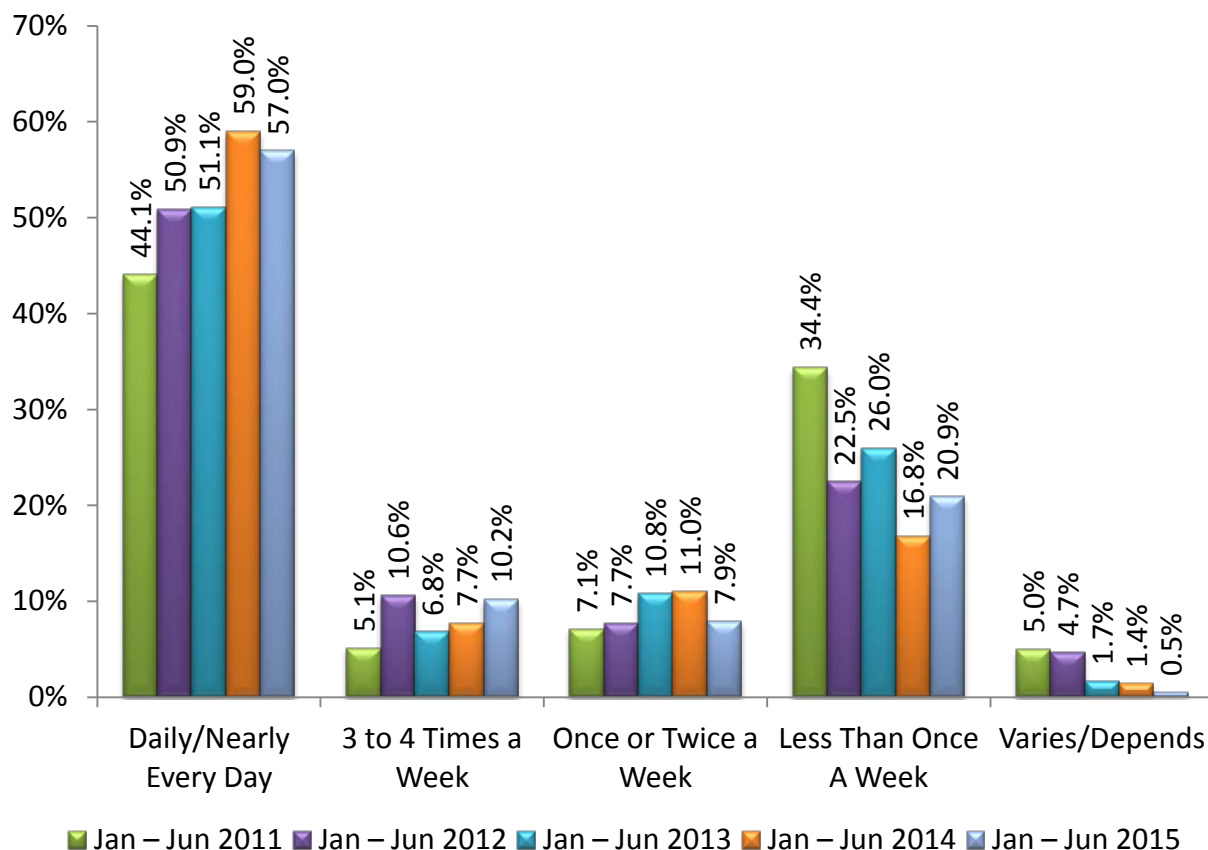
Q: Which of the following do you own?



	Jan – Jun 2011	Jan – Jun 2012	Jan – Jun 2013	Jan – Jun 2014	Jan – Jun 2015
Own Either an Internet Capable Cell Phone or a Tablet	42.9%	49.9%	62.8%	68.4%	71.9%
Cell Phone Capable of Accessing Internet/Email	41.0%	44.5%	55.4%	60.0%	66.7%
Tablet Device	9.0%	18.5%	33.0%	39.9%	46.9%
Both	7.8%	13.1%	25.6%	31.4%	41.7%
Base: All Adults	(n=600)	(n=603)	(n=600)	(n=601)	(n=502)
Margin of Error:	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.4% Points

Frequency of Accessing the Internet Via Mobile Device

Q: How often do you use your tablet or mobile device to access the Internet?



	Jan – Jun 2011	Jan – Jun 2012	Jan – Jun 2013	Jan – Jun 2014	Jan – Jun 2015
Daily/Nearly Every Day	44.1%	50.9%	51.1%	59.0%	57.0%
3 to 4 Times a Week	5.1%	10.6%	6.8%	7.7%	10.2%
Once or Twice a Week	7.1%	7.7%	10.8%	11.0%	7.9%
Less Than Once A Week	34.4%	22.5%	26.0%	16.8%	20.9%
Varies/Depends	5.0%	4.7%	1.7%	1.4%	0.5%

Base: Adults who own a tablet or cell phone capable of accessing the internet/email

(n=194)

(n=228)

(n=297)

(n=330)

(n=298)

Margin of Error:

+/- 7.0% Points

+/-6.5% Points

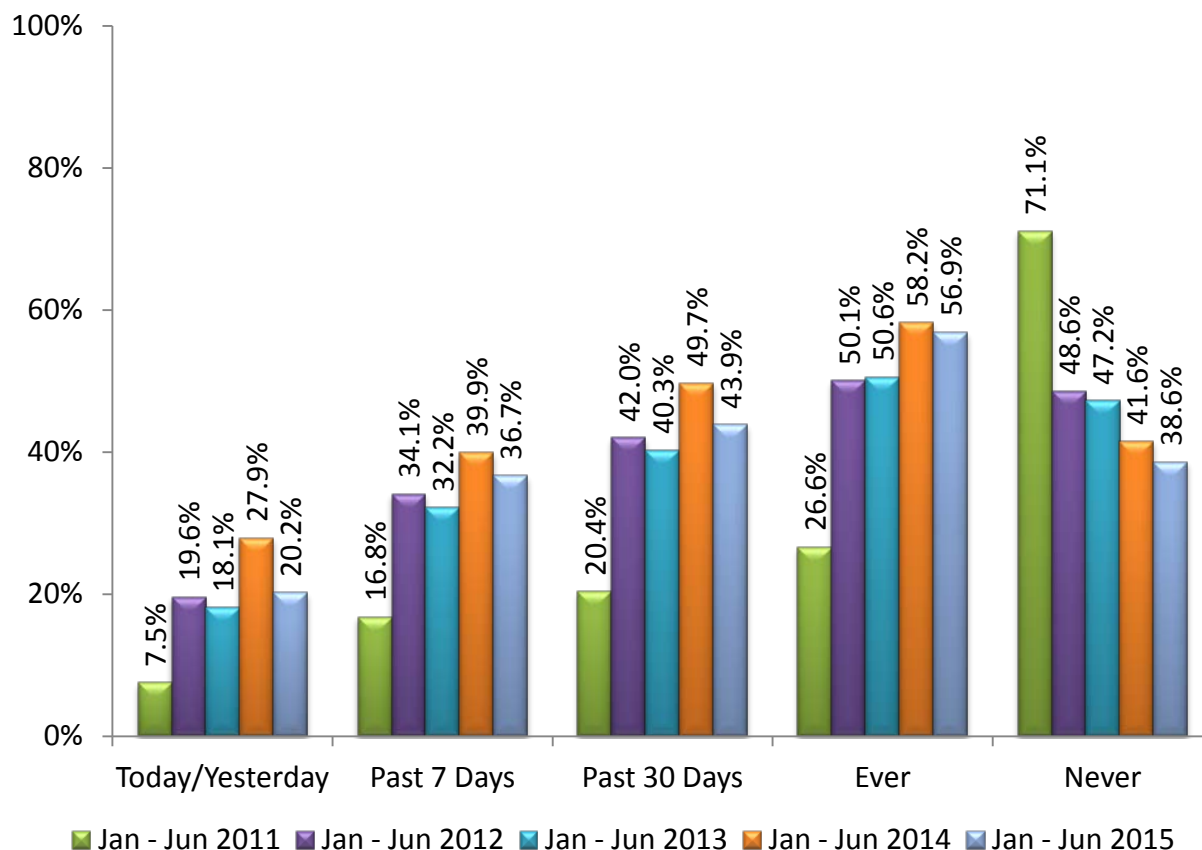
+/-5.7% Points

+/-5.4% Points

+/-5.4% Points

Last Time Accessed Lee Website Via Mobile Device

Q: When was the last time you used your tablet or cell phone to access BillingsGazette.com?



	Jan – Jun 2011	Jan – Jun 2012	Jan – Jun 2013	Jan – Jun 2014	Jan – Jun 2015
Today/Yesterday	7.5%	19.6%	18.1%	27.9%	20.2%
Not Yesterday, But Within Past Seven Days	16.8%	34.1%	32.2%	39.9%	36.7%
Eight to 30 Days Ago	20.4%	42.0%	40.3%	49.7%	43.9%
More Than 30 Days Ago	26.6%	50.1%	50.6%	58.2%	56.9%
Never	71.1%	48.6%	47.2%	41.6%	38.6%

Base: Adults who own a tablet or cell phone capable of accessing the internet/email

(n=194)

(n=228)

(n=297)

(n=330)

(n=298)

Margin of Error:

+/- 7.0% Points

+/- 6.5% Points

+/- 5.7% Points

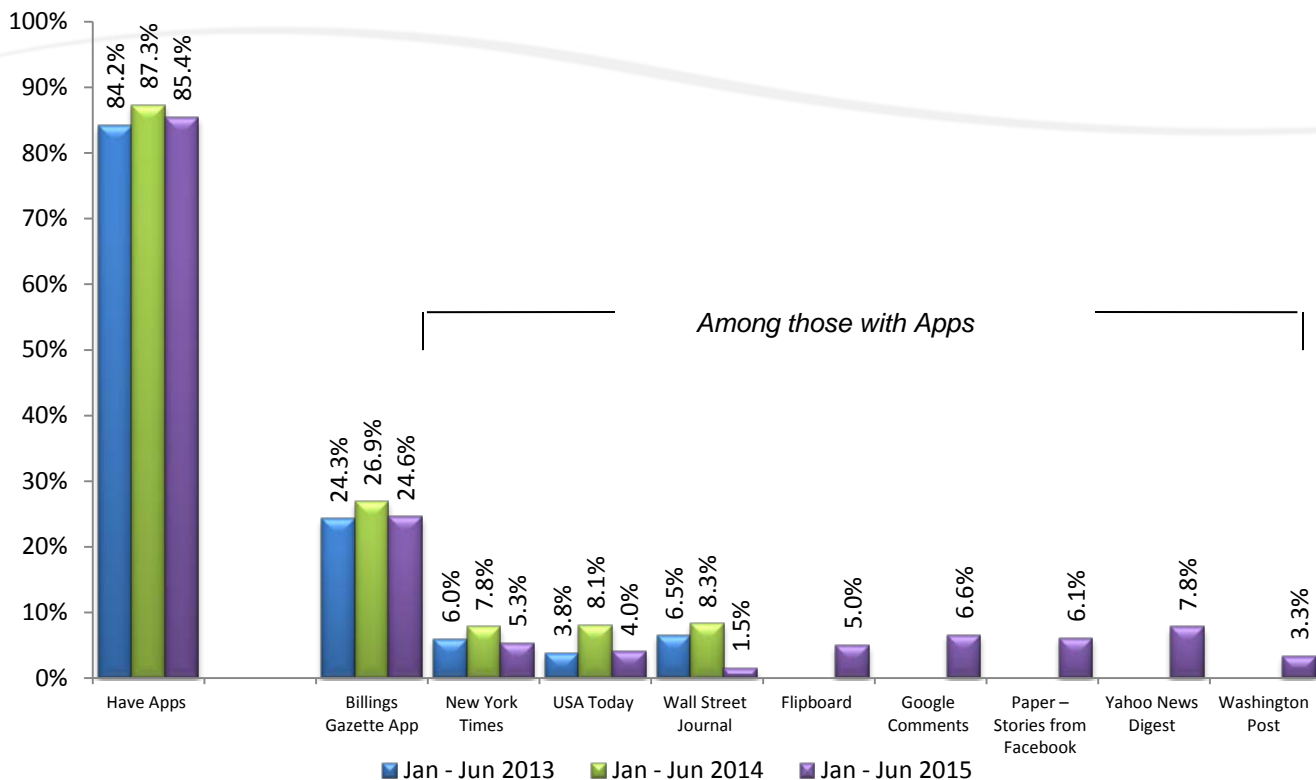
+/- 5.4% Points

+/- 5.4% Points

Mobile News Apps

17

Q: Does your electronic tablet or cell phone have apps? Have you downloaded any of the following news apps?



	Jan – Jun 2012	Jan – Jun 2013	Jan – Jun 2014	Jan – Jun 2015
Have Apps	77.2%	84.2%	87.3%	85.4%
Billings Gazette App	28.8%	24.3%	26.9%	24.6%
New York Times	6.3%	6.0%	7.8%	5.3%
USA Today	4.5%	3.8%	8.1%	4.0%
Wall Street Journal	5.7%	6.5%	8.3%	1.5%
Flipboard				5.0%
Google Comments				6.6%
Paper – Stories from Facebook				6.1%
Yahoo News Digest				7.8%
Washington Post				3.3%

Base: Adults who own a tablet or cell phone capable of accessing the internet/email

(n=234)

(n=330)

(n=227)

Margin of Error:

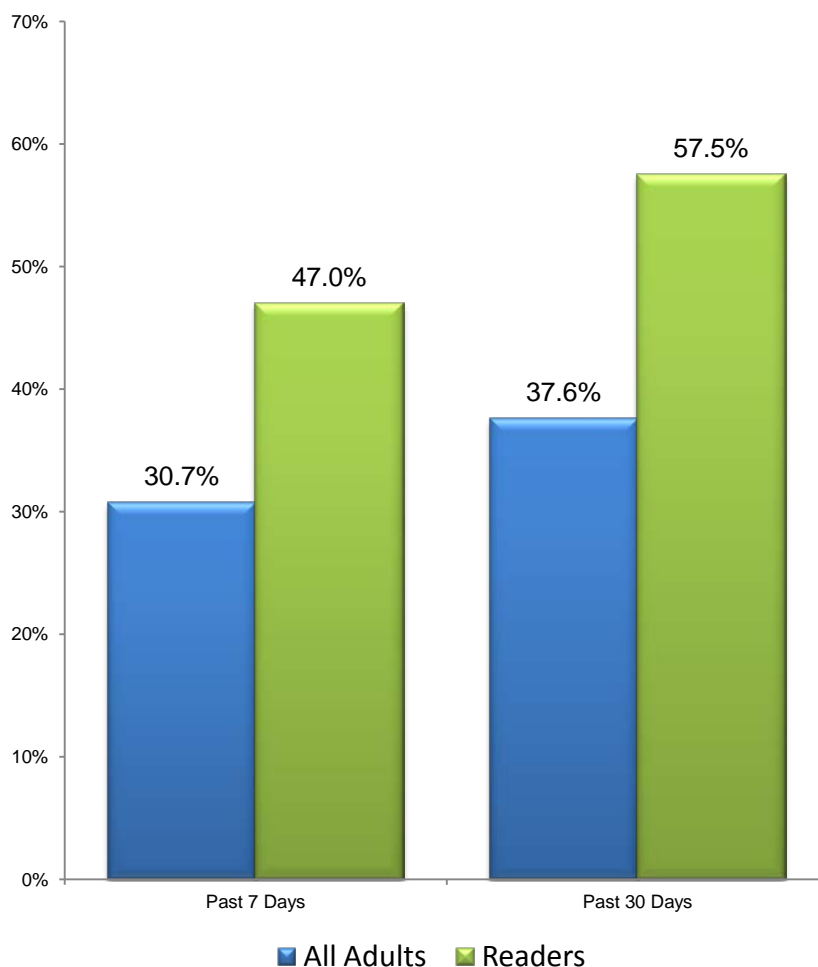
+/- 6.4% Points

+/- 5.4% Points

+/- 6.5% Points

Preprint Readership

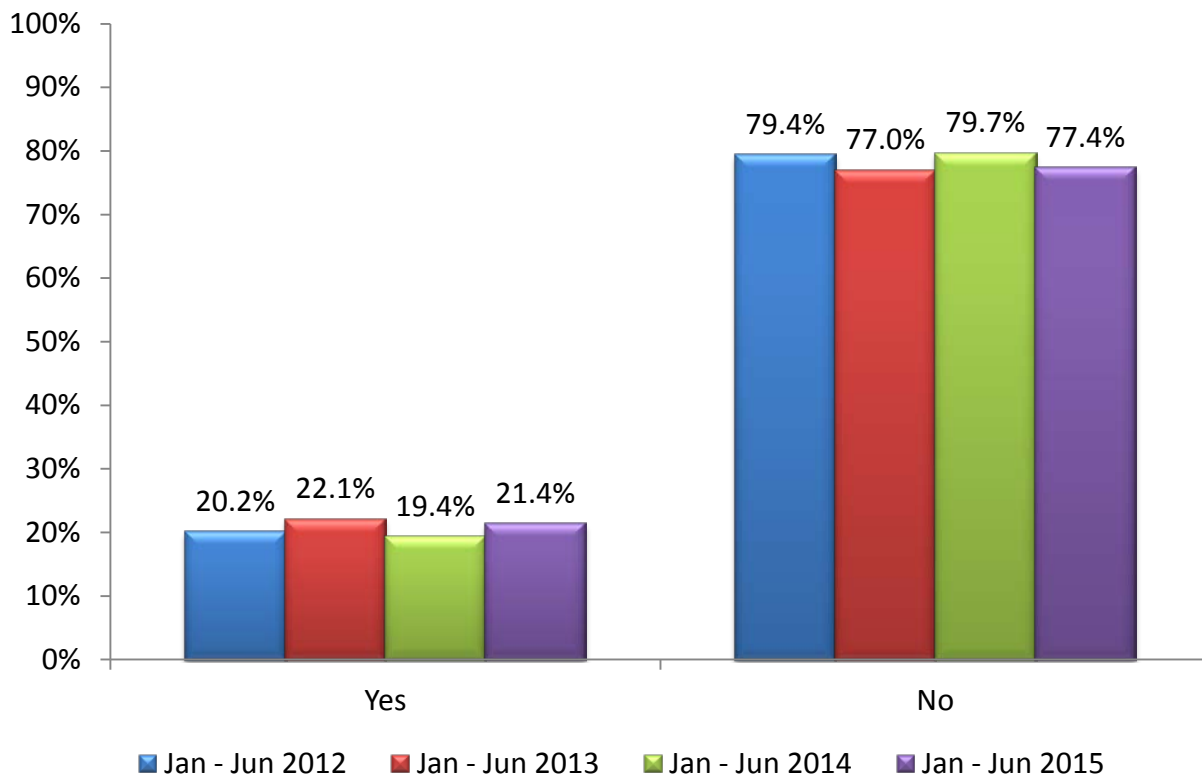
Q: In the past 30 days have you read preprinted advertising in the newspaper? In the past 7 days?



	All Adults							Readers						
	Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014		Jan - Jun 2009	Jan - Jun 2010	Jan - Jun 2011	Jan - Jun 2012	Jan - Jun 2013	Jan - Jun 2014	Jan - Jun 2015
Past 7 Days	35.5%	35.3%	33.2%	30.8%	32.6%	32.3%	30.7%	45.5%	47.9%	45.1%	39.2%	45.2%	45.1%	47.0%
Past 30 Days	48.3%	45.8%	44.1%	43.3%	44.1%	43.8%	37.6%	61.9%	62.2%	59.9%	55.1%	61.3%	61.1%	57.5%
Base:	(n=600)	(n=600)	(n=600)	(n=603)	(n=600)	(n=601)	(n=502)	(n=477)	(n=462)	(n=470)	(n=485)	(n=466)	(n=460)	(n=376)
Margin of Error:	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.4% Points	+/- 4.5% Points	+/- 4.5% Points	+/- 4.5% Points	+/- 4.4% Points	+/- 4.5% Points	+/- 4.6% Points	+/- 5.0% Points

Television Service

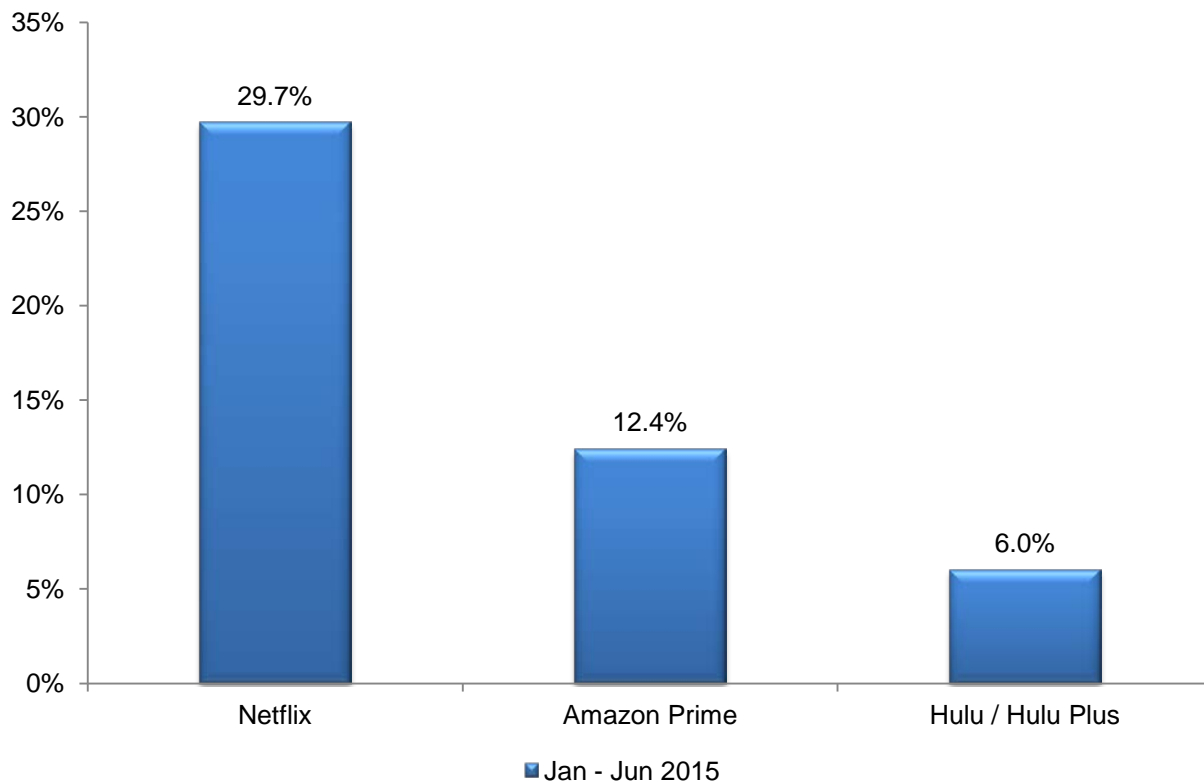
Q: During the past year, have you cancelled or cut back on your cable or satellite TV service?



	Jan – Jun 2012	Jan – Jun 2013	Jan – Jun 2014	Jan – Jun 2015
Yes	20.2%	22.1%	19.4%	21.4%
No	79.4%	77.0%	79.7%	77.4%
Base: All Adults	(n=603)	(n=600)	(n=601)	(n=502)
Margin of Error:	+/- 4.0% Points	+/- 4.0% Points	+/- 4.0% Points	+/- 4.4% Points

Video Streaming Services

Q: Do you have a subscription to any of the following video streaming services?



	Jan-Jun 2015
Netflix	29.7%
Amazon Prime	12.4%
Hulu / Hulu Plus	6.0%

Base: All Adults

(n=502)

Margin of Error:

+/- 4.4% Points