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Abstract

Customers in the U.S. are rapidly shifting to consume content on mobile devices, such as cellphones, smartphones and tablets, rather than traditional media, such as computer screens and paper. More than half of the adult population (58%) in the U.S. owns a smartphone¹, and three out of five smartphone owners get news on their devices². In 2008-2013, U.S. daily smartphone use time grew nearly 22 times, while for newspapers use time tanked by more than half³.

According to eMarketer, the global mobile ad market doubled in 2013⁴, and in the U.S. it is projected to grow nearly fourfold in 2013-2017⁵. This new and promising revenue stream of mobile ads is currently dominated by tech giants rather than media companies that actually produce the content mobile users consume. In North Carolina, this report found that half of 166 newspapers' websites were not offering mobile products at all, and more than a third of those that did were still sticking to the simplest mobile product type available – a standalone mobile website, oftentimes severely limited in functionality and potentially hard to monetize.

The survey of 81 community newspaper executives in North Carolina revealed that managers did realize the importance of mobile, but were hesitant to bet big on the mobile market with its elusive returns, citing additional staff workload, costs and return on investment as primary concerns. Almost a third of surveyed newspaper managers were not fully aware of their own company's mobile offerings.

Most executives who planned to build mobile products in the near future didn't have a strategy for implementing mobile or making it profitable. The majority weren't sure what exactly they were going to build. As a result, instead of embracing it as a chance to grow readership and digital revenue, executives are considering mobile as a more defensive strategy.

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INTRODUCTION

In the U.S., consumers' eyes are on their mobile devices. This product group, composed of cellphones, smartphones, tablet computers and other similar gadgets (excluding desktops and laptops), enjoyed spectacular growth over the last couple of years. Smartphones are spreading faster than any other technology innovation in American history. It took 45 years for landline phones to go from 5% household penetration to 50%, and smartphones leaped from 5% to 40% in about 4 years⁶. Tablet penetration skyrocketed to 10% in 1.5 years, much faster than other innovations such as television (11 years), the Internet (9 years), telephone (25 years) or electricity (30 years).

In line with that blossoming market, mobile news consumption is also on the rise in the United States. More than half of adults own smartphones (58%)⁷ and get news on a mobile device (54%)⁸. In 2008-2013, U.S. daily smartphone use time has grown more than 22 times (2133%), while for newspapers use time decreased in half (50%)⁹. As smartphone penetration has rapidly accelerated, media organizations have increasingly turned to mobile, a game-changing reporting tool and a promising news delivery system that helps make digital content accessible for untapped populations, such as minorities and low-income families.

Mobile audience growth is booming and news is an integral part of the mobile experience for many. The State of the News Media 2014 report stresses that "news is a part of the explosion of social media and mobile devices, and in a way that could offer opportunity to reach more people with news than ever before."¹⁰ The authors state that "social and mobile developments are doing more than bringing consumers into the process – they are also changing the dynamics of the process itself." In its recent report "U.S. Digital Future in Focus 2014," ComScore said mobile was "the single most significant change in this [media] landscape since the invention of the internet."¹¹

However, news organizations are still struggling to turn the platform into a meaningful source of income¹². As the State of the News Media 2013 report puts it, "For most publications, advertising on the Web has generated only a fraction of the revenue print or television advertising once earned, and mobile ads are bringing in only a fraction of what Web ads make"¹³. News companies introduced mobile applications, mobile-optimized websites and other mobile-oriented products, but the return on investment was often elusive. The Federal Communications Commission (FCC) noted in its report "Information Needs of Communities: The Changing Media Landscape in a Broadband Age" that "so far, mobile devices have not proved to be a major source of revenue for news outlets, neither through advertising nor paid applications, but news organizations are still experimenting with different business models"¹⁴.

The period of experimentation has lasted for years without significant progress, so certain experts question the possibility of identifying a plausible solution for the industry¹⁵. But the quest is not going to stop, as newspaper publishing, dubbed a "dying industry" in certain

reports¹⁶, relentlessly keeps pushing to transform itself with digital revenue models in mind. Successful transition to new digital-based revenue models, with mobile being one of them, is essential for the entire newspaper industry to endure through the time of disruption caused by the Internet and subsequent technological advances¹⁷.

The only media organizations that survive will be those that reinvent themselves to remain relevant for consumers in the digital age. Mobile is at the heart of this ongoing transformation. Scholars and industry experts praise the concept called “mobile first” that focuses on using mobile as a primary delivery platform for news¹⁸. The approach also encompasses mobile-friendly design (“responsive design”), functionality, and full accessibility of online resources for the growing audience of mobile device users. Existing reports of mobile adoption by community newspapers¹⁹ highlight that the “mobile first” approach is barely embraced by community newspapers, as they are yet to focus their efforts on mobile²⁰.

The renowned news industry analyst Ken Doctor²¹ said²², “There’s simply no way to over-emphasize the centrality of getting smartphone and tablet experiences right for news customers”. He emphasizes that newspapers failing to adopt mobile-centric content and sales development approaches “have slim hopes of growing digital ad revenue over the next several years”.

Successful transformation for an organization is impossible without an effective vision – “an imaginable picture of the future”²³. In turn, crafting that vision is challenging without relevant and accurate information about the market and the competition. While mobile products are being launched by newspapers of different scale²⁴, it is only the mobile advancements of national news companies that enjoy massive publicity. Accounts of smaller news media organizations’ attempts to implement mobile are scarce, both in scholarly sources and in professional media.

The studies that do look into the issue from a smaller news company perspective²⁵ reveal certain unique challenges these organizations face, such as limited cell coverage in remote areas, lack of digitally-savvy sales staff or management’s naivety about the colossal ongoing change in the media business. Thus, the example of national news operations is barely, if at all, relevant to smaller newspapers. This difference underscores the importance of closing the gap in the coverage of mobile adoption by national and community newspapers, especially given that the latter amount to 82% of all newspapers in the U.S.²⁶.

The purpose of this report is to provide professionals and scholars in the field with a market-wide insight into adoption of mobile by community newspapers in North Carolina, in the time frame of late 2013 to early 2014. The report is supplemented by an interactive web presentation of results available at <http://www.nickky.com/mobileadoption>.

CHAPTER 1

The Age of Mobile and the Decline of Newspapers

Newspapers continue to navigate through the most severe financial crisis in decades. In 2012, newspapers' advertising revenues fell for a sixth year in a row with inflation-adjusted numbers dropping below the levels of the 1950s²⁷. Newsroom staffing declined to 38,000 professional full-time news jobs, falling below 40,000 for the first time since the American Society of News Editors started its annual newsroom census in 1978²⁸. In the period between 2000 and 2013, the industry lost 18,400 jobs, nearly a third of all full-time available newsroom positions²⁹. Newspaper companies have to deal with a multitude of issues, such as diminishing advertising revenues, the painful transition to digital, cost-cutting, layoffs, debts and pension obligations, just to name a few³⁰.

Despite print circulation's slump in 2008-2011 and stabilization at 0% change in 2012³¹, digital audiences continued to rise sharply. "The vast majority of Americans now get news in some digital format," said Pew Research Center's State of the News Media 2014 report³². In 2013, 82% of Americans got news on a desktop or laptop and 54% got news on a mobile device. Moreover, 21% were getting news "frequently" on mobile devices.

Growing consumption levels of mobile news content were highlighted in a 2012 survey by the Pew Research Journalism Project³³. According to the study, three out of five smartphone owners (62%) and nearly the same share of tablet owners (64%) said they were getting news on their mobile devices. The news consumption was reaching well beyond the simple checking of news headlines: 73% of tablet and 61% of smartphone news consumers confirmed they read longer, in-depth articles at least "sometimes." It is important to note that users were not necessarily abandoning their previous platform when consuming news content on mobile: 45% of mobile news consumers turn to desktops or laptops for news on a daily basis; 75% use these devices to get news at least once a week.

According to comScore, in September 2013 the number of unique adult visitors engaged with U.S. newspaper digital content reached 141 million, representing 11% growth since June 2013³⁴. More than half, or 77 million, of those engaged with news content came from mobile devices. Another study shows that in three years, U.S. Internet usage on smartphones surged more than fourfold, from 81 billion minutes in May 2010 to 381 billion minutes in May 2013³⁵. Time spent on digital media in 2013 overtook time spent watching TV, eMarketer³⁶ estimates. In 2013, average daily newspaper usage dropped to 18 minutes, or more than 50% since 2008. At the same time, daily mobile use surged 642% to 141 minutes; smartphone use time grew more than twenty two times, from 3 minutes to 67. Use of tablets skyrocketed from one minute per day in 2010 to an average of 63 minutes daily in 2013.

ComScore analysts said³⁷ that the growth of total U.S. time spent on digital platforms was fueled primarily by mobile devices. Between December 2010 and December 2013, total digital engagement time has grown 83% to 995 billion minutes. On smartphones it rose 237% to 442 billion minutes, and it grew more than tenfold on tablets (1040% to 124 billion minutes). At the same time, desktop engagement increased by just 7% to 429 billion minutes.

The role of digital as a source for news is constantly growing. In 2012, 39% of respondents in a Pew Research Center survey reported that they accessed news online “yesterday,” up from 24% in 2004³⁸. Newspapers in 2012 were referenced to as a daily news source by just 29% of the respondents, down from 42% in 2004.

The mobile media market emerges as a more and more important part of digital media, even though its impressive growth hasn’t yet become the majority of the market. Mobile Internet traffic in the U.S. still amounts to less than a quarter of total Internet traffic, even at its all-time high of 23.51% in February 2014³⁹. Nevertheless, a number of online services are already attracting more traffic from mobile devices rather than from laptops or desktops. According to comScore⁴⁰, in June 2013, Zynga had 71% “mobile only” visitors, Groupon – 68%, Pandora – 67%, AccuWeather Network – 63%.

News companies are swiftly catching up with the trend. In July 2013, BBC News reported that mobile traffic to its sites (excluding tablets) trumped desktop traffic on Saturdays and Sundays. On a typical weekday, mobile phones drove 42% of BBC News’ total traffic⁴¹. For Mirror.co.uk, mobile traffic prevailed on weekends for the first time in July⁴². A study based on comScore data showed that up to 42% of digital visitors of major UK newspapers such as *Mirror* and the *Evening Standard* accessed these websites only via mobile and tablets⁴³ in September 2013. For *Financial Times*, mobile is 50 percent of their traffic⁴⁴.

Similar tendencies are surfacing in U.S. media. In September 2013, ESPN’s website registered more unique visitors from mobile devices than from desktops and laptops⁴⁵. Half of all of BuzzFeed’s traffic, 35% of Forbes’, 42% of SheKnows’ and 41% of YouTube’s traffic came from “non-desktop devices,” i.e. smartphones and tablets⁴⁶. The McClatchy Company, a large newspaper chain, reported that in the first quarter of 2014, mobile users represented 43% of total monthly unique visitors to the company-owned newspapers’ websites⁴⁷.

Products by news media companies are of particular appeal to mobile audiences. According to comScore Media Metrix, in September 2013, Huffington Post and its owner, AOL Inc., reached 50.1% of the U.S. mobile media market, ranking sixth among the top “U.S. Smartphone Properties”⁴⁸. CBS Interactive and Turner Digital respectively ranked 10th (39.8%) and 11th (38.1%) on the list. ESPN and Glam Media ranked 13th and 14th with a 33.4% and a 33% reach respectively. Recognizing the importance of mobile among content consumers, Nielsen added mobile audience to its TV show ratings⁴⁹.

“Mobile is becoming the web for many people,” Ken Doctor said in an exclusive commentary for this report. “Today, mobile traffic to news sites makes up 35-40% of all traffic, up from 25% 18 months ago. By the short time that 2016 rolls around, the majority of traffic will be coming from mobile.” It’s especially true for some population groups, such as low-income families and minorities: for them, a Pew Internet’s study says, a mobile device serves as a primary tool to get online⁵⁰. Latino consumers were found to be more likely than the general population to own a smartphone, and less likely to have a desktop computer⁵¹. Magdalena Pantelis, general manager of the Polish Daily News in Chicago, said for many Polish immigrants “a home computer is a luxury,” but suddenly “smartphones appeared, and it has become the computer you can carry in your pocket.”⁵²

While actively consuming digital content, customers were not necessarily willing to pay for it. Only 14% of mobile news consumers reported they had subscriptions for both print and digital access. Just 9% of the respondents had digital-only subscriptions, compared to 31% who subscribed to print editions. The Pew study⁵³ showed that only 6% of weekly tablet news users have ever paid for news on their device. The situation might improve gradually as more and more newspapers move to charge for digital content but will remain a challenge⁵⁴. About 420 daily newspapers in North America offered digital subscriptions or used paywalls as of October 2013⁵⁵, but even market giants such as *The New York Times* are still getting a remarkably larger share of circulation income from print. In 2013, *The Times’* paper circulation brought the company \$675 million, compared to \$149 million, or about 22%, in revenue from digital subscriptions⁵⁶.

Some experts note that pricing might be a sensitive issue in a push for greater returns from digital subscriptions. Customers get used to the bundled pricing of news products (paper plus digital), but the common approach of offering deeply discounted digital subscriptions for a limited time might backfire, slowing down customer adoption of bundles at a full price⁵⁷. What is even more important, despite all newspapers’ digital efforts, is that consumers continue to consider print to be a more valuable platform and are unwilling to pay for online content, no matter the payment model⁵⁸.

U.S. newspapers traditionally considered circulation to be the second most important revenue source after advertising. While advertising revenues were declining in print⁵⁹, the digital advertising markets continued to expand, growing 17% to \$37.3 billion in 2012⁶⁰. Mobile advertising is booming. According to eMarketer, the global mobile ad market more than doubled (105%) in 2013⁶¹, reaching \$17.96 billion. It’s projected to grow 75% in 2014, to \$31.45 billion. ComScore notes⁶² that mobile advertising works especially well in improving brand metrics, particularly purchase intent (28%), likelihood to recommend (22%) and aided awareness (20%).

Advertisers expect to spend a larger percent of their budgets on mobile; the share is projected to grow from 2.6% in 2012 to 24.9% in 2018. At the same time, the spending on print ads in newspapers is expected to decline from 11.5% in 2012 to 7.4% in 2018⁶³. Google and

Facebook currently dominate the mobile advertising market, taking home 67% of revenues⁶⁴; the situation is predicted to remain the same in 2014.

In Great Britain, mobile ad spending is projected to surpass newspaper print ad spending in 2014⁶⁵. Mobile advertising in the U.S. is estimated to grow nearly fourfold from 2013 to 2017, significantly outpacing the total market's growth of 15% in the same period⁶⁶. However, eMarketer expects that for U.S. newspapers, print advertising market will remain almost flat, with a slight decline projected at 3% in 2014-2018⁶⁷, while digital ad spending on newspapers and magazines will increase by 12%. According to eMarketer's Global Media Intelligence report⁶⁸, mobile advertising will grow from \$7.7 billion in 2013 to \$29 billion (a 277% increase) by the end of 2017 in North America alone. At the same time, the total media advertising market in North America is expected to grow at a significantly slower rate, from \$184.7 billion in 2013 to \$212.4 billion by the end of 2017.

Media companies enjoy high demand for their content on mobile but fail to turn the platform into a sustainable revenue source despite a growing mobile advertising market⁶⁹. According to Gasee⁷⁰, screen size issues and fragmentation of user attention may serve as possible explanations.

The transition to digital for newspapers is happening at a faster pace, but there is still no definitive solution to the fundamental problem of trading analog dollars for digital pennies, as NBC Universal's CEO Jeff Zucker famously put it⁷¹. Jason Del Rey in *Advertising Age*⁷² rephrased the saying to reflect the current state of affairs: "If publishers once lamented that offline dollars turned into 'digital dimes' as content and audiences moved to the web, here's what might be keeping them up at night: Digital dimes are turning into mobile pennies." He noted a range of challenges for mobile advertising, such as significantly lower bulk prices, device-specific space restraints and advertiser unpreparedness for efficient mobile campaigns.

Newspapers continue to experiment with additional revenue streams, but most of these media companies struggle to offset their losses in print advertising, while advertising in general accounts for 69% of the total money supporting the newsrooms⁷³. Part of the solution might be fixing a longtime disproportion between advertising and circulation revenues. The equation was severely skewed toward advertising in the past and experts note that it might take years for companies to reach a roughly even split between circulation and advertising revenues⁷⁴. *The New York Times* has already reached the point at which, for the first time in the newspaper's history, circulation revenues surpassed those from advertising⁷⁵. But for the industry as a whole, the picture remains bleak. In the decade from 2002 to 2012, print advertising collapsed 50% from \$44 billion to \$22 billion, while circulation revenues fluctuated slightly between \$10 and \$11 billion. According to Pew Research Center's estimates, just 24% of total financial support for news is coming from the audience⁷⁶.

The data collected in 2011 from a sample of 38 U.S. newspapers by Pew Research revealed that for about every \$11 of print revenue, the participants attracted just \$1 online, and mobile

contributed to just 1% of this “digital dollar”⁷⁷. The situation with mobile monetization has improved since then. According to a survey of publishers (122 out of 210 were newspaper publishers, 188 out of 210 currently distribute mobile content) conducted by the Alliance for Audited Media⁷⁸, a majority (54% and 56%) of respondents said mobile represented up to 9% of their advertising and circulation revenues. Publishers said they anticipated the growth of mobile advertising through the end of 2014. While 40% of the surveyed publishers said they were not currently charging for their content across platforms, 77% were looking at both advertising and circulation as sources for mobile revenue. Nearly all (90%) respondents claimed a mobile presence compared to just 51% in 2009, and the remaining 10% said they were planning to develop mobile-optimized content in 2013. Some analysts are optimistic, too. In January 2013, BIA/Kelsey reported that advertiser demand for mobile will increase in the next 12-24 months and that the industry should expect a significant shift towards highly localized “native advertising” campaigns, with mobile advertising selling at premium rates⁷⁹. However, the report highlighted that mobile held 10% of media time for consumers, but just 1% of advertising revenue.

Mark Jurkowitz, associate director of the Pew Research Center’s Project for Excellence in Journalism, agreed that seizing the opportunity in mobile monetization might be challenging. “One big question is whether newspapers can turn their growing mobile audience into mobile dollars” because these revenues “may end up in the pockets of the tech giants rather than the news producers”⁸⁰. A continuing decline in print revenues will fuel the newspapers’ willingness to explore new digital and mobile revenue models, but at this point some remain skeptical. “We spend 90 percent of our time talking about 10 percent of our revenue,” a newspaper executive was quoted saying⁸¹. True, media industry experts have long been calling for newspapers to pursue a comprehensive “mobile first” strategy⁸², a strategy that embraces the idea newspapers must “move aggressively to mobile immediately – don’t wait for revenue to materialize.”⁸³

While big news organizations have seemingly responded to the call by developing and executing their mobile strategies, it is unclear if the vast majority of newspapers in the U.S. are as enthusiastic about going down the mobile path, which is thorny, unbeaten and barely lucrative for now.

CHAPTER 2

Community Newspapers Going Digital

Community newspapers constitute 82% of the newspapers in the United States. According to *Editor and Publisher Newspaper Data Book 2013*, as of February 2013 there were 6,476 community newspapers (weeklies) in the U.S., compared to just 1,427 dailies⁸⁴. Scholars highlight the importance of local, community newspapers to their communities, journalism and democracy⁸⁵. Prior to the recent economic crisis, community newspapers were arguably in better financial shape than many other media companies⁸⁶, but as the Internet and then mobile gained strength as gales of creative destruction⁸⁷, these news organizations faced the urgent need to reinvent themselves for a digital age. “The viability of the news product and the very survival of these newspapers are at stake,” said Mark Jurkowitz⁸⁸. Some scholars even call for a “systematic overhaul of the press, one that returns news organizations to the communities they serve”⁸⁹ through the evaluation and implementation of new community-based, commercial, foundation or government-supported models for community press.

Community newspapers face multiple challenges and opportunities on the way to adopting these new commercial digital models. Community newspapers enjoy a number of favorable conditions in their transition to digital and mobile. Most importantly, they have a highly loyal audience. According to a survey by the National Newspaper Association⁹⁰, readers reported high interest in community newspapers: 71% read a community newspaper at least once a week and 96% of respondents paid for them. The survey revealed that 75% of participants read all or most of their newspaper, 92% participants thought local newspapers were informative and 53% of participants preferred “newspaper” to other sources of local news, such as TV and radio. Nearly half (47%) of online users reported that a local newspaper’s website was their favored source of community news.

The Nielsen National Cross-Media Engagement study⁹¹ showed that local newspapers enjoy high trustworthiness (56%) and rank higher than average in advertising engagement (119 for local newspapers, compared to 94 of Cable TV). In addition, a bigger share of customers reported noticing advertising in local newspapers (48%) compared to national newspapers (46%) or national news websites (36%). Local newspaper digital ads are reported to be less noticeable (40%), but at the same time less annoying (37%) than on national newspapers’ websites (39%), cable TV (40%) or social networks (46%). “Content publishers of all sorts should move as quickly as possible to connecting with users on mobile devices (tablets and smartphones),” the report says⁹².

Advertisers seem loyal towards community newspapers and local media in general. The National Newspaper Association reported that 53.5% of respondents to an informal survey saw revenue increases in the last five years⁹³. In November 2013 BIA/Kelsey updated its outlook⁹⁴ and projects that local media advertising revenues will grow from \$132.9 billion in

2013 to \$151.5 billion in 2017, driven by a 13.8% compound annual growth in digital advertising. Mobile advertising spending is expected to increase nearly threefold, to \$20.7 billion in 2017. According to Borrell Associates⁹⁵, small and medium businesses (SMBs) currently spend the largest share of their budgets (22%) on local newspapers, with online/digital ranked second by share size (19%). For the entire U.S., the authors note, online/digital ad spending comprises 25% of local ad budgets and newspapers' share is 19%. The survey shows SMBs are likely (47% of respondents) to use mobile advertising in the next 12 months, so the current mobile advertising share of 5% is going to grow.

Community newspapers are likely to be more flexible in building and implementing their strategies; only 60% of weekly newspapers were estimated to be chain-owned, compared to 80% of dailies⁹⁶. While private, individually-owned newspapers may enjoy better control and efficiency in decision-making, an ownership by large, publicly traded chains oftentimes opens up access to resources and expertise to drive innovation⁹⁷. Limited resource is one of the many items on the list of challenges community newspapers face in their transition to digital. Other problems include trouble with basic staffing⁹⁸, debt burdens that many newspaper companies still bear, underfunded pension plans⁹⁹, and management stiffness in terms of mobile adoption¹⁰⁰. According to Pew Research Center's analysis, weekly newspapers' share in annual ad revenue was just 2.7% compared to 58.6% of dailies¹⁰¹, so the amount of funds to invest in the digital future might be severely limited for smaller newspapers.

When compared to familiar, relatively straightforward print revenue models (advertising and subscriptions or rack sales), digital and especially mobile revenue models are much more complex while generating significantly lower return: \$3.4 billion in digital ad revenues compared to \$18.9 billion coming from print ads in 2012, according to the Newspaper Association of America¹⁰². However, currently there is no single digital revenue solution that could've easily replaced print revenues to sustain newspaper operation.

"I think that the solution will be multiple revenue streams, it will be experimental, how creative you are in seeking out those revenue streams... we must try everything. And we must not believe that one thing is going to work over the other until we actually experience it," Justin Smith of Atlantic Media said at a conference, as quoted in the "Out of Print" book¹⁰³.

"When we talk about publishers' digital revenue strategy ... I think most people realize that has got to be a much more diverse bet or set of investments than it's been historically," Jed Williams, Vice President of Strategic Consulting and Senior Analyst at BIA/Kelsey, said in an exclusive commentary for this report.

"If you're just relying on selling your own online inventory, and even your mobile inventory, and having your sales team sell it through basic advertising inventory, that's just not gonna create enough new revenue to offset print losses and offset legacy costs and create sustainable growth for you," he said.

Strained financial resources, print revenues that are still substantial and the lack of understanding of new digital revenue models, much more complex than those of the print age, may lead to a cultural lock-in, threatening community newspapers' survival¹⁰⁴.

Discrepancies between community expectations and newspapers' digital approaches undermine successful implementation of digital-centered strategies. As media consultant and futurist Amy Webb puts it, "The most important thing a small news organization can do is to figure out who, exactly, its audience is, and what the competition is up to."¹⁰⁵ Some communities seem to be unwilling to engage with mobile or even online content, not to mention paying for it. A National Newspaper Association¹⁰⁶ survey revealed that 49% of readers had "never" read local news online and only 24% owned smartphones (60% owned simple cell phones). However, 69% of cell phone owners reported accessing local news on their devices in the last 30 days.

While community newspapers were found¹⁰⁷ to "fairly quickly" adopt the tools and technology for reaching audiences in new ways, they still struggle to meet the digital needs of audiences, especially those of young adults. Winning the attention of younger audiences is crucial to successfully implementing new digital and mobile business models in the long run, as the demographics of communities continuously change. A survey by Graybeal¹⁰⁸ confirmed that community newspapers realize the importance of attracting youth to digital (web) versions of their newspapers. A Pew Internet study¹⁰⁹ shows that the millennial generation (ages 18 to 25) ranks the highest in terms of mobile phone ownership (95%) and is the most active in using mobile Internet access (63%). For these audiences, utility and ease of use were positively correlated to mobile news adoption¹¹⁰. The authors found that students' news consumption preferences and patterns influenced the adoption of mobile news.

Young readers are of great interest to local media, as the demographics of their communities change along with reading habits. A study by Hunt, Atkin and Kowal¹¹¹ showed that a number of interactive features, as well as attachment to their communities, influence the frequency and duration of young readers' interaction with their community newspapers' websites. A study by Weiss¹¹² found that news organizations lag behind in the implementation of location-based news services in their mobile apps, even though these services are among the most popular features of mobile handsets. The author notes that "a gap exists between what news consumers, particularly young adults, are doing and using on their smartphones and what news organizations are able to provide"¹¹³. Karlis, Mitchell and Collins emphasized¹¹⁴ that local weeklies generally lag behind in providing comprehensive information on their websites, including searchable archives and interactivity options. The experimental study by Graybeal, Sindik and Qingmei¹¹⁵ looked into plausible monetization models for online news providers. The authors found that flexibility, in terms of paying for content (article by article or page by page), makes it more appealing to young customers. To some extent, their findings might also be generalized to mobile users, given the similarity of the medium. Chyi, however, highlights that consumers are still generally unwilling to pay for digital content, no matter the model¹¹⁶.

With such a variety of challenges, opportunities, audiences and markets, most mobile advocates in the industry agree that there is no universal approach to successful implementation of digital and mobile models for newspapers¹¹⁷. They are unanimous, however, that media organizations should start doing mobile right now.

CHAPTER 3

Newspaper Landscape in North Carolina

In August 1751, James Davis, a seasoned printer from Virginia, published the first issue of the first North Carolinian newspaper: *The North Carolina Gazette* in New Bern.¹¹⁸ More than 2000 different newspapers have come and gone in the state since then¹¹⁹. Today, according to the *Editor and Publisher Newspaper Data Book 2013*, there are more than 46 dailies and another 120 community newspapers published on different schedules (“weeklies”) in North Carolina¹²⁰.

The daily circulation of North Carolina newspapers¹²¹ in 2013 varied significantly between 1,000 and 137,000 copies, with an average of 12,270. The majority of newspapers, 105, were owned by companies that operate more than one newspaper in the state (“chain-owned”), while 61 were considered “independent,” including those operated by companies that didn’t have any other newspaper properties in North Carolina. The data from 2013 showed that 18 companies were running more than one newspaper in the state. The largest newspaper owners, by North Carolina presence, were Civitas Media, LLC (14 newspapers), Cooke Communications, LLC (11 newspapers) and Warren Buffett’s BH Media Group (10 newspapers¹²²) The McClatchy Company owned the two biggest daily newspapers in the state, *The (Raleigh) News & Observer* and *The Charlotte Observer*, with a combined circulation of nearly 260,000.

To explore mobile adoption in the state, a mixed-method study was conducted, consisting of a two-phase survey of editors and publishers in North Carolina about mobile adoption, in-depth interviews with editors, publishers, and experts and also a content analysis, i.e. evaluation of the newspapers’ websites for mobile readiness and actual availability of mobile products. The project utilized an expanded meaning of the term “community newspapers,” as suggested by Abernathy¹²³. These include “newspapers that serve specific geographic, ethnic or cultural communities” compared to the traditional understanding of the term, “newspapers with a circulation of 50,000 or less”¹²⁴. The broader approach of this study essentially removes size limitations and allows the exploration of a wider variety of newspapers, from small rural weeklies to large dailies covering multiple counties and large urban areas. The study used the full sample (census) of NC newspapers based on the representation in the *Editor and Publisher Newspaper Data Book 2013*. Some newspapers were excluded from the census for various reasons¹²⁵, such as stopping their publication or merging with other newspapers.

In total, websites of 166 active North Carolina newspapers were evaluated (census). The two-phase survey of editors and publishers garnered 81 responses from the initial census-based sample of 247 individuals (33% personal response rate). Overall, executives of 75 newspapers returned surveys (45% organizational response rate). Six newspapers were represented by both editors and publishers who submitted their survey answers. For the matters regarding

the current newsroom situation, organizational mobile adoption and strategy, primarily publishers' answers were analyzed¹²⁶.

The subsample of survey respondents closely resembled the census in terms of newspaper ownership: 63% of newspapers in the census were part of a media group ("in-chain"), on par with 62% in the subsample of newspapers that answered the survey. Due to self-selection, the survey subsample was skewed toward newspapers offering mobile products: 55% of these newspapers returned the survey, compared to just 36% of newspapers with no identifiable mobile products. The survey participant self-selection subsample was also skewed toward daily newspapers: 54% of them returned the survey, compared to a 35% response rate of newspapers with different publishing schedules (weeklies and others). Nearly three quarters (72%) of newspapers in North Carolina were not publishing daily.

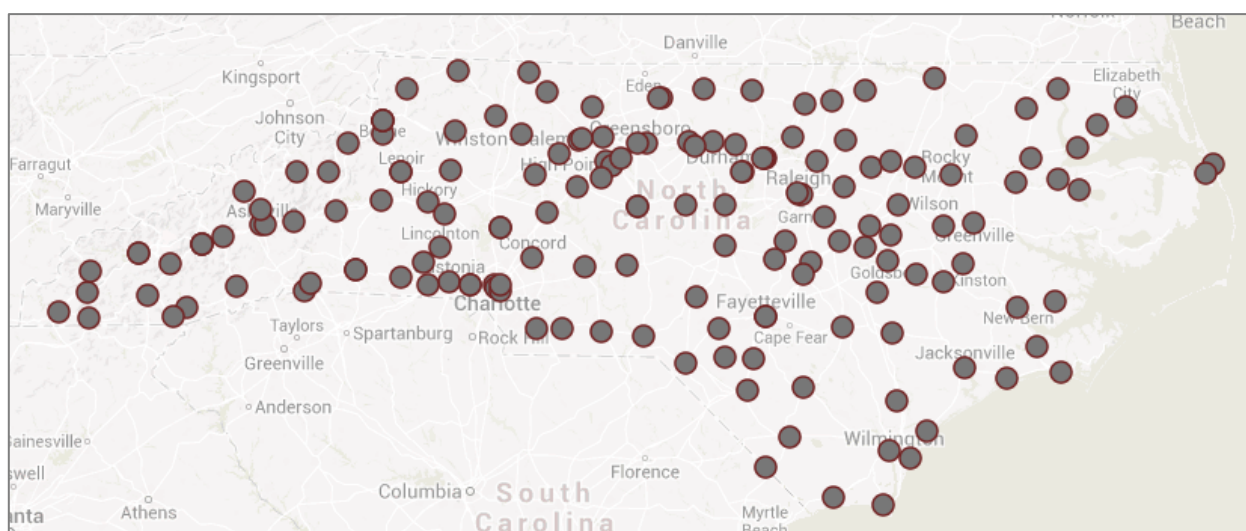


Chart 1: Distribution of North Carolina Newspapers: the Study Census, via Google Maps

The survey answers helped paint a self-reported picture of the current situation on newspapers' financials, mobile use and innovation. On a five-point agreement Likert-type scale (from 1 – strongly disagree – to 5 – strongly agree), newspaper executives confirmed the trend of shrinking financial resources (Mean = 4.12¹²⁷) and cost-cutting (M = 4.21). Some participants noted issues with funding newsroom staff and the use of outdated newsroom equipment; however, these were not strongly pronounced. There were no clear signs that surveyed newsrooms were "fostering innovation" (M = 3.59), but most participants agreed that their colleagues were at least comfortable with mobile (M = 4.2). Participants also indicated that they started using mobile phones, on average, 13 years ago (M = 13.04). Most of them owned a smartphone (N = 72, 90%) and a tablet computer (N = 55, 69%). In fact, 76% (N = 53) of smartphone users also had tablets. That's significantly higher than nationwide averages in January 2014. According to the Pew Research Internet Project¹²⁸, 58% of American adults had smartphones and 42% had tablets. Other mobile devices newspaper

executives mentioned included “a laptop,” “a Macbook Air” and “an iPod Touch.” One person said they didn’t currently own a mobile device.

Survey participants reported being “very involved” in making publishing (70%) and editorial decisions (74%), though a lesser share were as strongly involved in decisions about digital strategy (49%) and mobile strategy (46%). Survey respondents agreed that using mobile devices was, on average, easy for them ($M = 4.3$). Most of the participants accessed the Internet from their mobile devices daily ($M = 4.05$) and used mobile applications, or “apps” ($M = 4.2$). There was no clear agreement on if it was hard for participants to maintain productivity without their mobile devices ($M = 3.58$), and if they started using mobile before their colleagues ($M = 3.19$). Respondents who represented newspapers offering mobile products believed these products to be popular (59% agreed or strongly agreed), essential for customer satisfaction (55%) and to help companies do better news reporting (50%). The vast majority agreed (91%) that mobile presence is important for a modern media organization, while the same statement about social media presence elicited less support (80%). Newspaper managers agreed that users liked it when companies roll out mobile products (61%) and were willing (69%) to recommend that other media executives implement mobile.

CHAPTER 4

The Mobile Adoption Study – Executive Summary

As of March 2014, 81 executives of 75 North Carolina newspapers returned surveys. In addition, websites of 166 newspapers were evaluated manually for traces of mobile products. This data lies in the foundation of this report.

The results of manual website evaluation (content analysis) show that 49%, or 82 out of 166, North Carolina newspapers offered some type of mobile product for their readers. Thirteen newspapers didn't even have a website and five used Facebook pages for their web presence.

Most of newspapers with mobile products (59%) only offered one product, and they generally relied on a simple mobile website with significant functional limitations (34%). One-fifth (21%) of all newspapers with mobile products offered only responsive websites, a one-size-fits-all solution convenient for customers both on desktops and mobile.

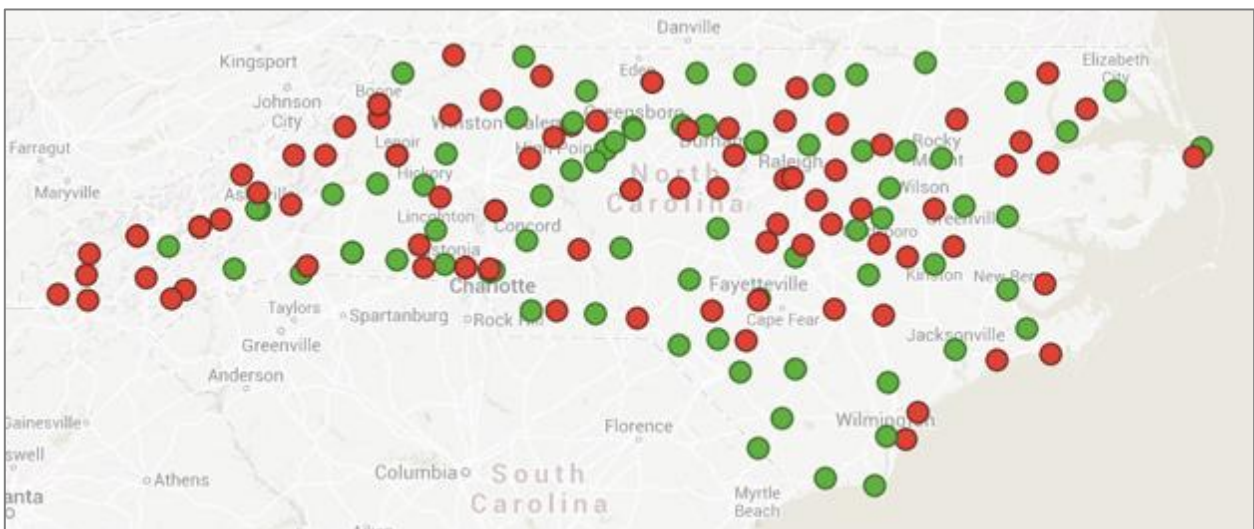


Chart 2: North Carolina Newspapers that Offer Mobile Products (green dots) and the Ones that Don't (red dots), via Google Maps

According to the survey results, 46 participating newspapers (61%) reported having a mobile product. The largest share¹²⁹, 35%, offered more than one mobile product, 13% were planning to introduce mobile products and 25% didn't have any. The most popular type of a mobile product was a responsive, mobile-optimized website (50% provided, 17% planned to), followed by a mobile app (32% provided, 26% planned to) and a tablet app (28% provided, 17% planned to).

In 23 cases (28%) discrepancies between self-reported and independently observed mobile product offerings were noticed. In the survey, 8 executives reported not having a mobile product (though in fact they did) and 15 mentioned mobile products nowhere to be found.

Respondents with mobile offerings believed that their products were popular (59% agreed or strongly agreed), essential for customer satisfaction (54%) and helped to perform news reporting better (50%). More than a third (38%) of newspapers offering mobile products expected these to become profitable in the next two years. About the same share (40%) said they were not sure how to monetize their mobile products. Still, the majority (65%) believed that their mobile product was important to their financial success in the future.

More than half of newspapers with mobile products (54%) said that these were producing revenue. The most popular ways of mobile monetization were digital advertising (85%) and subscriptions (52%). Some (11%) charged users per app download and 19% said they were getting money from sponsors.

Nearly half of the participants (47%) agreed or strongly agreed that they had plans to build a mobile product in the next couple of years. When asked about realizing this goal, more than half (57%)¹³⁰ of these said that they did not have a specific plan to implement mobile or to make it profitable (70%)¹³¹. More than three-fourths (83%)¹³² of newspapers aspiring to create new mobile products reported they didn't exactly know what they are going to build. While most (84%) of these companies said they were not going to create a mobile product by themselves, the majority (77%) reported having a designated person to oversee mobile efforts.

When making decisions about mobile strategy, the top three priorities participating managers highlighted were: costs (56%), staff workload or availability (48%) and ROI (40%). Other notable options included audience-related concerns (13%), revenue concerns (11%) and corporate strategy (6%).

CHAPTER 5

Mobile Products and Services Newspapers Offer

As a part of the study, the sample (census) of NC community newspapers' websites was examined for mobile product availability¹³³. The results show that the majority of newspapers (N = 84, 51%) do not offer mobile products, and when they do, in a third of cases, the offering is very simple and outdated: a mobile website lacking in functionality.

TYPES OF MOBILE PRODUCTS

In most situations, news organizations in the U.S. offer the following mobile products for their customers:

- **"Mobile-friendly website"**

This is a type of newspaper website specifically designed for the small screens of mobile devices. Mobile versions of websites typically offer simplified design, increased font size and optimized multimedia elements (smaller pictures and video). The functionality of these mobile websites is often limited, as some features that exist on a full website might be unavailable on the mobile version or fail to work as expected.

While modern smartphones are powerful enough to display a standard ("desktop") version of traditional websites, it's often inconvenient to navigate through their small elements on mobile screens sized typically between 3" to 5" (compare with standard laptop screens, 11" to 17", and desktop screens, 17" to 26").

Contemporary web design trends push webmasters to create integrated "responsive" websites (contrary to standalone mobile versions), that can be conveniently viewed on screens of different sizes without loss of functionality: the same website automatically adjusts its design for different devices and screen sizes. "Responsive" websites offer a richer and better experience compared to the traditional standalone mobile versions.

Studies show that customers prefer apps to mobile websites. BI Intelligence found that U.S. users spent more time a day on mobile apps than browsing the web¹³⁴. Flurry Analytics' report¹³⁵ highlights the difference: in the first quarter of 2014, the average U.S. consumer spent 86% of mobile time on apps (including 3% on news apps), and just 14% on mobile browsers. According to a Nielsen study in 2012¹³⁶, the time spent on mobile apps more than doubled in a year, while mobile web usage remained flat.

Mark Zuckerberg, founder and CEO of Facebook, has famously expressed his regret in 2012 that Facebook was relying too much on universal HTML5-based websites rather than “native apps,” tailored specifically to each mobile platform. “The biggest mistake we made as a company was betting too much on HTML5 as opposed to native,” Zuckerberg said¹³⁷.

- **Mobile application**

A mobile application (also sometimes called an app, or a “native app”) is a program that runs on a user’s smartphone, performing different specific tasks.

Compared to websites accessed from a browser on mobile, a dedicated application is easier for customers to access, often better-tailored to users of mobile devices and offers richer functionality and easier access to multiple features of the smartphone. Studies show that customers are using apps more actively than their mobile browsers¹³⁸.

Applications not only deliver news and stories, but also notify customers about breaking events, deliver location-specific information (weather forecast, story alerts) and help users easily submit their own content to a publication (for example, quickly sending an eyewitness video or alerting the newsroom where an accident happened). These advanced features are generally hard or sometimes even impossible to reproduce without an app.

According to a study by StepLeader¹³⁹, 42% of respondents said that breaking news was the most important news category of mobile news apps. National and local news ended up second (18%) and third (12%). About a third of participants (32%) said they preferred to actually read news on smartphone apps, while 41% clung to breaking news alerts.

The absolute majority of smartphones today in the U.S. use baseline software from Apple (iOS – 41%) or Google (Android – 52%)¹⁴⁰. These are the two mobile platforms that most mobile app developers use nowadays. The same mobile applications offered for different platforms may vary significantly in their feature set and design. Individualized mobile applications are generally more expensive in terms of development and integration, when compared to mobile websites.

- **Tablet application**

Popularity of tablet computers (also called “tablets”) has been skyrocketing in the U.S. These devices gained traction blazingly fast, reaching 10% penetration in just 18 months. It took the Internet nine years to reach the same mark, and 11 years for television¹⁴¹. According to the Pew Internet Project’s research¹⁴², as of January

2014, 42% of U.S. adults had tablets, slightly lower than 58% of U.S. adults who owned smartphones. E-readers might be also considered “tablets” (32% of U.S. adults owned them).

Tablets with screen sizes generally ranging between 7” and 12” took their niche between smartphones and laptops. Some popular tablet models are Apple iPad, Samsung Galaxy Tab, Amazon Kindle Fire or Microsoft Surface.

With their comfortably-sized screens, tablets are perfectly suited for content consumption. Typical websites might be conveniently viewed on tablets without special adaptation, and standard smartphone apps may work too, but a number of news organizations are offering “native tablet applications” to make their content look even more compelling on tablet devices.

These devices should be paid special attention to: tablet penetration growth is rapid, and their vivid large screens allow for richer customer experience. What is more, consumers actually prefer reading news stories on tablets (55%), rather than smartphones (32%), a study shows¹⁴³. Even if a news organization doesn’t plan to build a fully-functional app and just straightforwardly publish a PDF version of the print paper in their mobile apps, tablets would be better suited to this.

- **Other**

Mobile products should not, obviously, be limited to just mobile websites and applications. Text alert service is an example of a different type of mobile product. Customers provide their mobile numbers to a newspaper and then get instant text message notifications when something important happens, or news breaks, or whatever else the customer considers valuable and the newspaper is willing to provide (e.g. sports scores updates).

However, with the proliferation of smartphones and advanced apps, these notifications may be delivered at a whole new level of quality and integration, compared to relatively simple text alerts.

While monetization of mobile products as a whole remains challenging, consumers are less willing to pay¹⁴⁴ for mobile applications, compared to online editions. According to a February 2014 poll¹⁴⁵ conducted by the American Press Institute and the Associated Press-NORC Center for Public Affairs Research at the University of Chicago, just 15% respondents had paid news phone-based app subscriptions (16% for tablet-based), compared to 40% with paid online newspaper subscriptions and 64% who had subscribed to print newspapers.

CURRENT MOBILE OFFERINGS: OBSERVATIONS

The content analysis study of 166 newspapers in North Carolina took place in February-May 2014¹⁴⁶. Its main goal was to manually identify traces of mobile products on these newspapers' websites. It was found that 13 newspapers (8%) lacked web presence completely and 5 (3%) used Facebook pages as their main hubs of online presence.

The content analysis of the websites shows that 82 (49%) North Carolina newspapers offered some type of mobile product for their readers. This share was much higher among dailies (87% offered mobile products) than non-dailies (just 34% offered mobile products). A newspaper owned by a media chain¹⁴⁷ was more likely to have a mobile product (53% of these had mobile products) than an independent newspaper (43% had a mobile offering).

In terms of mobile product types, 34 (42%) out of 82 newspapers that offered mobile products provided more than one mobile product. Unsurprisingly, the most comprehensive mobile offering was provided by large dailies, such as McClatchy's The Charlotte Observer and The News and Observer or Berkshire Hathaway's Winston-Salem Journal : these media organizations offer multiple mobile and tablet apps, mobile website and text alerts. For smaller weeklies, the widest type of mobile offering observed was a mobile (or responsive) website complemented by text alert service or an app.

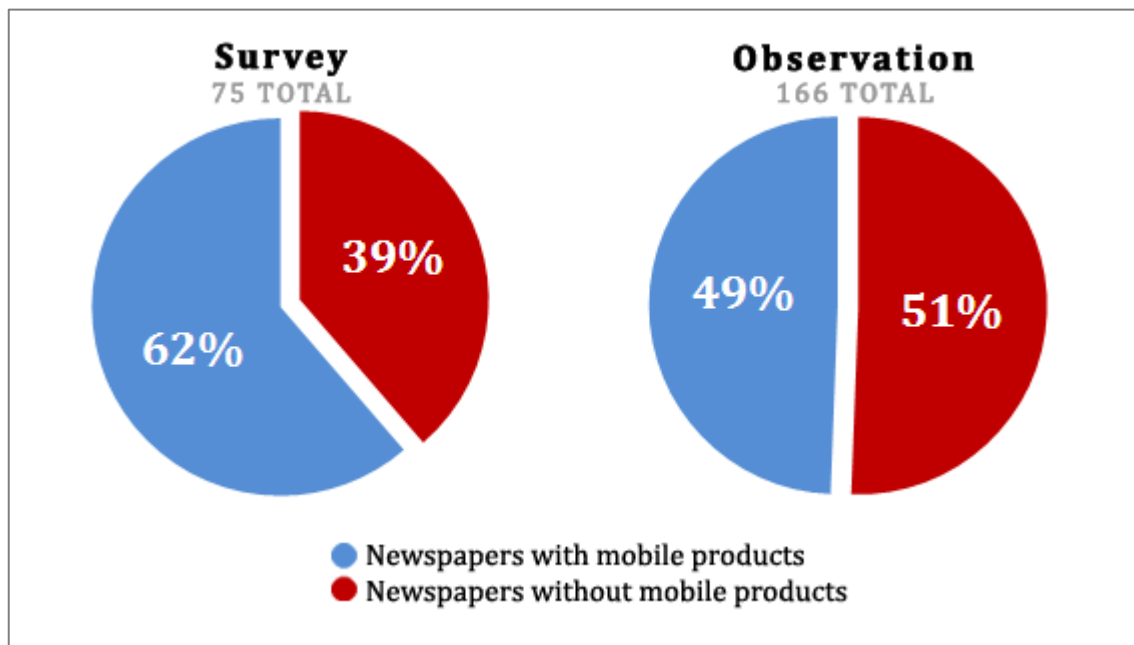


Chart 3: Mobile Product Offering Breakdown

While 19 (23%) newspapers switched to newer responsive websites, the majority (N = 47, 57%) relied on mobile versions, often outdated and barely functional. More than that, in 9 cases, the autodetection of a mobile device didn't work, so users had to type in an address of a mobile version manually. As a general rule, older websites that are not responsive automatically detect a user visiting from a smartphone and redirect the user to a mobile

version of the site that typically uses an address like “m.SITENAME.com” or “SITENAME.com/mobile.”

One newspaper’s website did detect a smartphone correctly, but it redirected the visitor to a completely separate-run mobile website that was nearly dysfunctional and had not updated for more than 1.5 years.

Responsive mobile websites are outnumbered nearly 1 to 3 by dedicated mobile websites, but executives seem to realize the potential of responsive websites and plan to switch. “We previously had a mobile version of our main site, but most users opted to load the main site anyway, even on their phones or tablets. We cancelled the mobile version and switched to responsive,” one executive said in a survey.

Mobile websites are the most pervasive, but apps are not very widespread: just 32 (19%) of all newspapers had mobile apps were identified (iOS apps had slightly better availability). Text alerts were rare to find – such a service was found at just 8 (5%) newspapers.

CURRENT MOBILE OFFERING: SELF-REPORTED

Among 75 North Carolina newspapers whose executives returned surveys¹⁴⁸, more than half (N = 46, 61%) were said to have a mobile product. More than a third (N = 26, 35%) offered at least two mobile products, 27% (N = 20) had one and 13% (N = 10) said they just had plans to introduce mobile products. A quarter (N = 19, 25%) didn’t have any mobile products.

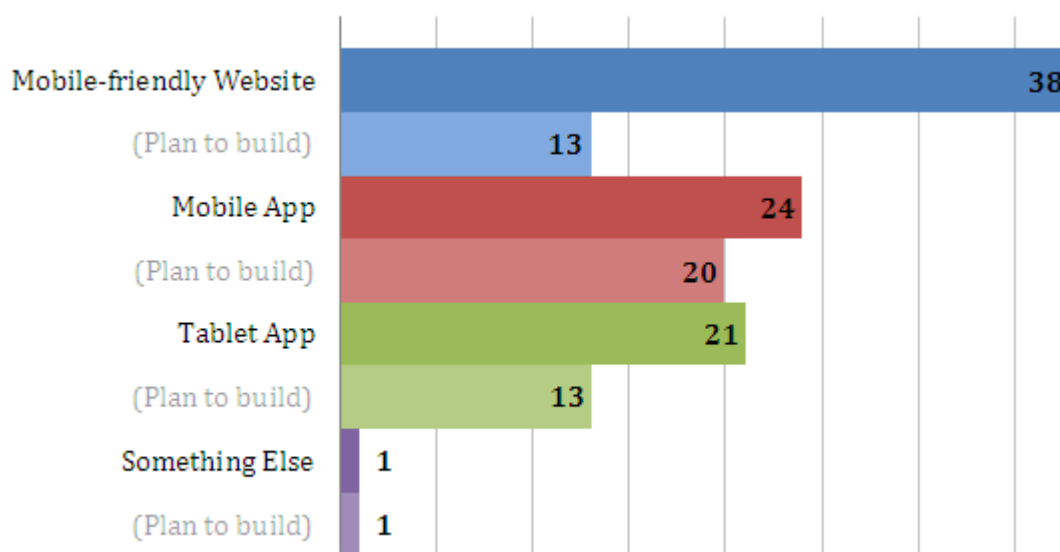


Chart 4: Existing and Planned Mobile Products (Survey Data)

The most popular type of mobile product was a mobile-ready website (either responsive or standalone mobile version): 50% of respondents said they had it, 17% planned to offer it. The next type, ranked by popularity, was a mobile app (32% provided, 26% planned to) and a tablet app (28% provided, 17% planned to). A “mobile application” was the most planned-for type of product (N = 20).

Unsurprisingly, among 33 organizations that explicitly named their most successful mobile product, a responsive website was leading the way (N= 18, 55%) and a mobile app followed (N = 11, 33%). Some newspapers weren’t ready to name their most successful products: “None – our technology vendor sucks,” one executive answered.

Some participants said they used social media, specifically Facebook, as their mobile product instead of apps: “We tried a cheap mobile phone app, but it was not satisfactory,” another executive said. Mobile application per se is not a sure bet, as these products might well be unsuccessful, no matter resources invested. One newspaper executive said their experiment with an app displaying location-based drink specials in the area “did not catch on with advertisers or users.”

DISCREPANCIES BETWEEN REPORTED AND OBSERVED MOBILE OFFERINGS

The comparison of survey results with content analysis results showed that nearly a third (N= 23, 31%) of survey answers differed from the content analysis observations: 8 participants (11%) said they didn’t have a mobile product when in fact they did, and 15 (20%) participants referred to mobile products that couldn’t be confirmed.

It’s important to note that the content analysis part of the study was limited to the information publicly available. It’s also possible that some participants were confused by the wording of a question. They may have failed to consider some specific offerings, such as separate mobile websites or text alerts, as legitimate mobile products. Finally, some participants might have inadvertently chosen the wrong option or have forgotten to tick the right one.

Jed Williams, Vice President of Strategic Consulting and Senior Analyst at BIA/Kelsey, said that a glut of different digital distribution platforms might have caused the confusion among executives.

“If there are so many new platforms and channels you have to be on, you have to have a desktop site, you have to have a mobile site, it has to be responsive across those two, and on tablet as well, and you gotta be presenting news on multiple social networks, through email newsletters, etc., right?.. It’s hard to keep up with a number of different channels and platforms that you have to accelerate your offering onto and distribute onto. So I can understand how that becomes almost a blur at some point,” he said.

PLANS AND SATISFACTION

According to the survey, respondents with mobile offerings believed that their products were popular (59% agreed or strongly agreed), essential for customer satisfaction (55%) and helped lead to better news reporting (50%). Nearly three-fourths (73%) agreed that their mobile products were growing in popularity.

The absolute majority of respondents agreed or strongly agreed that it's important for a modern media company to have a mobile presence (91%). The importance of social media was supported by a slightly smaller share (80%). More than half (61%) of respondents agreed that users like it when companies offer mobile products, and 69% of respondents said they would recommend that other media executives develop mobile products.

Less than half (N = 31, 47%) of respondents planned to create at least one new mobile product in the next couple of years. Among all participants, most are considering a mobile app (N = 20, 26%), next an app for tablets (N = 13, 17%) or a mobile-friendly responsive website (N = 13, 17%).

For some, it won't be the first mobile product. *The Sanford Herald*, a daily newspaper in Lee county, explicitly listed mobile-related requirements in their contract with its website provider. And it plans to do the same the next time it switches website providers. "More and more people relying on mobile for information, it was obviously essential for us that the web-provider have a mobile platform that's user friendly," said Bill Horner III, the publisher of *The Sanford Herald*.

That level of determination isn't a norm for media executives, as for many of them mobile development remains a blurry area. More than half (N = 17, 57%)¹⁴⁹ of these executives who planned to roll out mobile products soon said they didn't have a specific plan to implement mobile.

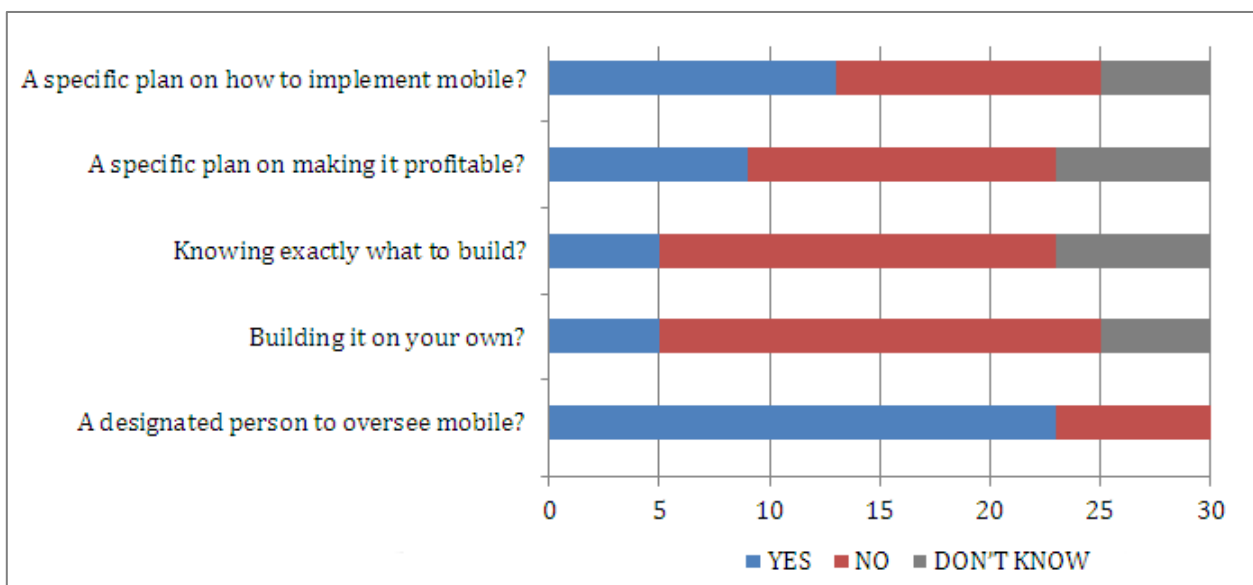


Chart 5: Mobile Implementation Readiness (Referring to a Planned Mobile Product)

“We've never discussed a "mobile" strategy for the newspaper,” one newspaper executive said in the survey. “It's understood that a mobile presence is important, but we're not sure how to implement a strategy right now,” an executive from another newspaper said.

More than three-fourths (N = 25, 83%)¹⁵⁰ of newspapers aspiring to create new mobile products reported they didn't know exactly what they're going to build. “I've honestly never even considered making a mobile (non iOS or Android compatible) website or version of our paper,” said a newspaper executive.

The vast majority (N = 25, 84%) of the companies represented said they were not going to create a mobile product by themselves. Still most of them (N = 23, 77%) reported having a designated person to oversee mobile efforts.

CHAPTER 6

Monetization of Mobile Products, Mobile Strategy and Reasoning behind Mobile Adoption

This study shows that monetization of mobile products is difficult for community newspapers. In terms of mobile strategy, many of those who would like to build a mobile product don't have a clear strategy on how to approach it. ROI, costs and staff-related questions are dominating issues that publishers consider when deciding on their mobile adoption.

MOBILE REVENUE

Monetization of mobile news products remains a challenging issue for newspapers throughout the nation¹⁵¹, and North Carolina newspapers are no exception. The survey shows that just 30% of newspaper executives had specific ideas on how to monetize mobile products they planned to build.

While 54% of newspapers with mobile products were producing revenue, just a little more than a third (38%) of these products were expected to become profitable in the next two years. Still, the majority (65%) of respondents believed that their mobile products were important to their financial success in the future.

With such a great share of existing mobile products being essentially mobile websites (50% of survey participants' and 40% overall), it's no surprise that newspapers were using familiar digital techniques for monetization. According to the survey, the most popular forms of mobile monetization were advertising (85%) and subscriptions (52%). Some (11%) charged users per app download and 19% of respondents reported getting money from sponsors.

Revenue opportunities on mobile remain a key concern, especially for smaller newspapers. This is not an easy task to tackle, experts note. With digital, newspapers may need to juggle multiple revenue streams to stay in business, and mobile is just one of them.

"I don't think mobile can be 'the cure-all remedy', I don't think it can be the panacea; it's part of the solution though," said Jed Williams. "It absolutely is incremental to digital revenue and needs to be one of many incremental digital revenue streams that put together become the digital solution or the digital way forward from a business perspective for these newspapers," said Williams.

Digital products could be used to increase the value of current print offerings, said John Drescher, the executive editor of The News & Observer: "We've ... effectively bundled the print sales with the digital sales and that might only be a short-term solution but anything that kind

of buys us some time now and enables us to hold on to the journalistic resources we have is good.”

Selling of digital and print advertising together is beneficial for both advertisers and newspapers. For advertisers, the use of two or more mediums increases the efficiency of advertisements by 50% or more¹⁵², allowing newspapers to charge at least 20% extra premium for the added value. This model also allows newspapers to evade the barely lucrative pay-per-view mobile advertising concept.

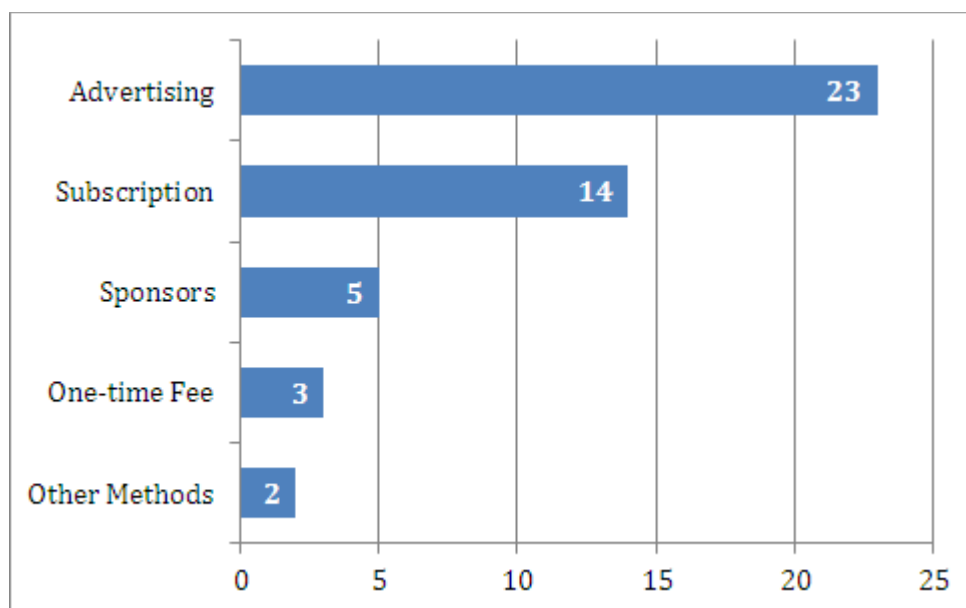


Chart 6: Revenue Sources for Existing Mobile Products
(by Number of Newspapers Using Each Model)

While bundling digital offerings with print looks like a step in the right direction from the revenue perspective, there’s still no universal solution for mobile monetization that news media organizations could adopt: each company needs to consider its audience, its capabilities and its advertisers while choosing the best monetization approach.

“Someday maybe we’ll get through and there’ll be some kind of obvious revenue idea to us, but right now we’re just kind of trying different things,” said Drescher.

MOBILE STRATEGIES

The strategy in mobile was an issue for many executives surveyed. More than half (N = 17, 57%) of newspaper executives who planned to build a mobile product soon said they didn’t have a specific plan to implement mobile, and the majority of them didn’t know how to make the mobile product profitable (N = 21, 70%)¹⁵³. Without a mature one-size-fits-all business model for newspapers, sensible mobile monetization remains a challenge.

"I just don't think mobile is ever going to be a business model that is sustainable like how the newspaper model has been for long time," said Bill Horner III, the publisher of *The Sanford Herald*. "I just don't think the dollars are gonna be there. I think you will have an opportunity with mobile to monetize it, but ... pennies are gonna stay pennies."

Williams disagrees. "Mobile pennies won't stay mobile pennies forever," he said. "I'm not sure that digital dimes are ever going to become digital quarters, but I like to believe that the mobile pennies can start to become mobile dimes. And maybe become mobile quarters," he said.

Horner notes that "a mobile-native generation" of younger consumers got used to free digital and mobile content. "We're expected to spend the same money we're spending now to put together a product but never charge for it," he said. "I just don't think mobile is ever gonna be a revenue driver for the newspaper business."

Beth Hunt, manager of editorial operations at American City Business Journals, recognizes the challenge: "Mobile is... indecipherable. It's completely necessary, and it's the hardest business problem that any media company is having to solve right now," especially in cases when all the resources and effort companies pump into mobile produce "a really zero return."

"It used to be that content sustained the company. It's now more and more looking like content will sustain content, and other products will sustain the company," she said.

In the survey, one executive said that their newspaper was approaching mobile devices "cautiously," that they're "willing to be on leading edge, but not the Bleeding Edge. There needs to be ROI that is sustainable."

Despite the importance of digital and mobile, print still needs a significant amount of managers' attention and resources, because it still brings a greater share of revenues. For *The News & Observer*, more than half of revenue comes from print.

"It's all about striking a balance," said Drescher. "If we could just give up our print newspapers ... in a lot of ways that would make the digital transition easier, because we could take a lot of resources that are devoted to print and put them to digital," he said.

"We have to find a way to take some of what we spend on print now and spend it on digital. And I spend a large part of my time now thinking about how to do that," he said.

Some other newsroom managers remain skeptical nevertheless. "Making money/revenue off 'free' internet, apps - old problem, no real solutions," one of the surveyed managers said.

DECISION-DRIVING FACTORS

Is it only pragmatism that drives executives' moves about mobile? Most managers who participated in the survey agreed on the following three factors as the main drivers of their mobile decisions¹⁵⁴: costs (56%), staff workload or availability (48%) and return on investment, ROI (40%).

"All of that comes into play: how to monetize it, how to recoup cost, can existing staff handle what need to happen," said one executive.

Media managers mention audience growth potential, deficit of expertise, owners' corporate plans and policies ("That is driven from the home office - they set standard and we follow"), post-recession economy, impact on core publication, accessibility of technology, and logistics as factors influencing their decisions about mobile.

Then there's a "readiness" of their readers, too. Michael Powell, the editor of *The Cherryville Eagle*, said that some share of their audience is "die hard old school guys, they got to have a hard copy of a paper in their hands, because that's all they know." He said "that'll be an unheard of science-fictionish type of thing" for them to abandon the paper and switch to ephemeral mobile apps: "they not only don't get it, they don't want it."

In case of *The Cherryville Eagle*, the audience is split 70/30 between older and younger people, and that's yet another factor publishers need to include into the equation. For older people, "there are some ... physical limitations, problems with their eyesight or their dexterity, their ability ... to touch one of those little buttons to get it to go on. Much of that for the elderly and people who have physical limitations, that [mobile products] obviously is gonna be detrimental. It isn't that they don't want to do that ... but unfortunately in some cases physically they can't," Powell said.

"Still getting subscribers. Hard copy. I do not put things online. Too much cost," said a newsroom manager. Another participant noted that contemporary smartphones are powerful enough to process even websites that are not optimized for mobile. Some respondents seemingly confused the use of mobile as a publishing platform with personal use of mobile devices by newsroom staff ("With computers there's no need for smartphones in the newsroom," "We all have our own personal mobile devices").

For some, the importance of mobile and other digital channels lies in their ability to spur consumption of the print product. "The future for print advertising is pretty scary, but that's where the money is right now, and that's why we're trying to get every other platform that we have, whether it's the digital platform, the mobile platform ... to drive people to the print product," says Bill Horner III.

“We deliver information to readers, but we also deliver readers to advertisers ... If we can’t put advertisers and readers together, then we’ve lost the leverage that we have, we’ve lost our business model,” said Horner. “I just don’t think that mobile is going to work to put advertisers and readers together. I just don’t think because there’s just not enough volume there to make that happen,” he said.

Despite the many lingering concerns, the absolute majority of respondents (91%) agreed on the importance of going mobile. “Audience growth is projected most in this niche, so newspaper media need to be there,” said one executive. “Staying relevant and up-to-date on technology is also a key consideration,” another newsroom manager said.

Innovation speed and problems on the paper revenue side also come into play, at least tangentially. “The rate of change is so fast and there are so many different things and our revenue base has been shrinking, and so you’re already trying to manage your shrinking resources, at the same time that you need to be developing and launching new products – it’s a lot of stuff to manage,” said Drescher.

Numerous obstacles in front of newspaper managers deter them from fully embracing mobile. The issue with mobile adoption is complex. As one media executive summarized, “We need it, but also need help getting there.”

CHAPTER 7

Results, Implications and Suggestions

Mobile is complex, but shall media organizations rush and adopt it? This chapter summarizes findings, explores market forecasts and provides suggestions to newspapers seeking opportunities in mobile.

RESULTS

The research shows that 49% of community newspapers in North Carolina were offering mobile products, and in many cases these were basic and outdated. More than a third (35%) of newspapers with mobile products had only the simplest standalone mobile websites in place.

Advanced mobile products, such as smartphone and tablet apps, were scarce on the market (just 30 newspapers, or 18%, had them), despite their potential, demand and popularity. BI Intelligence recently found that U.S. customers are spending more time daily on mobile apps than browsing the web (both on desktop and mobile)¹⁵⁵. In 2012, Nielsen found¹⁵⁶ that time spent on mobile apps more than doubled in a year, while mobile web usage remained flat.

For community newspapers, the study found that nearly a third of media executives were not fully aware of their newspaper's mobile offering: their answers in the survey didn't match findings made in the content analysis study of the respective websites. The executives either referred to mobile products that didn't exist or failed to disclose products that were actually implemented.

Survey respondents with mobile products agreed that their products were popular, important for customer satisfaction and even helped lead to better news reporting. More than a third of newspapers with mobile products expected them to become profitable in the next two years. When deciding on their mobile strategies, managers said costs, staff workload and ROI were the most important factors.

Monetization remains a challenge (about a third said they were not sure how to make money out of their mobile products), but the majority of respondents were optimistic and believed that the mobile product was important to their financial success in the future. Still, many newspapers are lacking a plan to get to that future. Nearly half the participants had plans to build mobile products, but the majority didn't have a specific strategy. More than three-fourths were not even sure about what mobile product they were going to build.

IMPLICATIONS

Consumption of content on mobile devices is growing explosively. Consumers are already there, but a number of producers are lagging behind with their mobile offerings.

Time spent on digital media in 2013 overtook time spent watching TV, eMarketer¹⁵⁷ estimated. In five years, average daily newspaper usage dropped more than in half, reaching 18 minutes in 2013 (compared to 38 in 2008). In the same period, daily mobile use surged nearly 7.5 times to 141 minutes and smartphone use grew more than twenty times, from 3 minutes to 67. Use of tablets skyrocketed from 1 minute per day in 2010 to an average of 63 minutes daily in 2013.

Mobile advertising is currently showing triple-digit growth.

For the period between 2012 and 2017, eMarketer projects¹⁵⁸ that the global mobile ad market will surge nearly tenfold, from \$8.76 billion to \$77.67 billion. In the U.S. it will grow at nearly the same rate, from \$4.36 billion to \$35.62 billion¹⁵⁹. In the same period, the desktop-based digital ads market is projected to decline 16% to \$27.21 billion.

The traditional revenue prognosis is grim for newspapers: Zenith Optimedia estimates¹⁶⁰ that their share in U.S. ad spending will decline to 9.4% in 2016 from 13.8% in 2013. The U.S. print ad market will remain almost flat in 2014-2018¹⁶¹, with a slight 3% decline projected.

Results of the national cross-media engagement study conducted by Nielsen and the Newspaper Association of America in 2013 highlight the importance of mobile¹⁶².

“The findings also reinforce data found in other research that content publishers of all sorts should move as quickly as possible to connecting with users on mobile devices (tablets and smartphones). Contrary to what some local newspaper publishing companies might initially believe, the data suggest this is a particular opportunity for growth one not fully taken advantage of by newspaper publishers,” the study authors said.

These facts and forecasts leave little hesitation about the importance of mobile. But adopting mobile as a publishing platform and finding appropriate business models remains a challenging task.

Ken Doctor recently noted¹⁶³ that it was impossible to “over-emphasize the centrality of getting smartphone and tablet experiences right for news customers.” In his opinion, newspapers failing to adopt mobile-centric content and sales development approaches “have slim hopes of growing digital ad revenue over the next several years.”

In considering mobile strategies, community newspapers should be aware that there’s no silver bullet. A long advocated “mobile-first” approach might not be the best solution for 100% of media organizations at the moment, and it may never be. While the readership is clearly shifting from print to digital and mobile (and to ubiquitous content provided by numerous companies), the lack of the single sustainable monetization model makes it challenging for management to fully embrace mobile and digital strategies and, ultimately, decide what specifically needs investments, and how much. On the other hand, these publishers who would

offer solid mobile products to users craving them, would win increased audience loyalty while also enjoying better chances of retaining old and attracting new readership, even in cases when the immediate bottom line improvement might be insignificant or non-existent.

WHAT'S NEXT

While demand for mobile content remains strong and keeps growing rapidly, the next big thing might be right around the corner. Many suggest that the next major stage of technology innovation will be driven by so-called wearable computing, the term encompassing such devices as smart watches, intelligent wristbands or augmented reality glasses, the market segment spearheaded by Google Glass¹⁶⁴ and Facebook's Oculus VR augmented reality helmets¹⁶⁵.

These new developments would, in turn, trigger new models for news consumption, adding to the complexity of the platform mix that media have to navigate nowadays. Wearable technology might also revolutionize the way newsrooms operate and assist reporters in delivering breaking, on-the-ground coverage with unprecedented ease and excellence¹⁶⁶.

Market analysts expect explosive growth in that emerging sector. According to an IHS iSuppli forecast¹⁶⁷, the global market for smart glasses alone could amount to 9.4 million units by the end of 2016. In May 2013, Credit Suisse analysts predicted the wearable technology market to grow tenfold over the next three to five years, from currently estimated \$3-5 billion to \$30-50 billion¹⁶⁸. Juniper Research expects a similar rate of growth (tenfold over five years) but is more skeptical in terms of absolute numbers. According to a Juniper Research report published in October 2013, spending on wearable technology worldwide may skyrocket from \$1.4 billion in 2013 to \$19 billion by 2018¹⁶⁹.

The shift to wearables, while significant in nature, is likely to happen gradually, since many of these wearable computing devices are currently in the early adoption stages or haven't hit the mass market yet. Moreover, these products are likely to co-exist with mobile technology for a considerable amount of time: currently available wearable devices, such as Google Glass or Samsung Galaxy Gear¹⁷⁰, are designed to be connected to and controlled via existing mobile devices, such as smartphones and tablets.

Similarly to other disruptive technologies, growth of the emerging wearable devices segment might at some point skyrocket, helping these products to take over the personal technology market in a heartbeat. This dramatic shift will lead to the transformation of the entire mobile industry, and newspapers will need to embrace a new medium (or media) once again.

Publishers, media managers and editors shouldn't be concerned about wearable media for a couple of years down the road. Even so, thoughtful implementation of mobile products might become a perfect training ground to streamline internal processes and get newspaper organizations accustomed to continuous digital innovation that is the key to survival for most

of them. With the right processes, strategies and internal procedures in place, it would be easier for media companies to publish on wearable devices or whatever else comes next.

THIRTEEN SUGGESTIONS ON MOBILE FOR COMMUNITY NEWSPAPERS

- 1) If your company is currently offering mobile products, consider auditing them independently. It's critical to evaluate what you have before you start developing or updating your mobile strategy.

Reach out to your readers and advertisers. Ask if they're happy with what you're providing, and if they're using it at all. Maybe your mobile website is lacking important features so that no one uses it? Or it's outdated? Or maybe your customers just don't know that you have a designated mobile website or an app? Or the font size is too small that it's hard for them to read?

The importance of direct feedback from your customers cannot be overemphasized, notes Jed Williams, Vice President of Strategic Consulting and Senior Analyst at BIA/Kelsey. "Go talk to your customers ... It seems obvious, but it's surprising to me how infrequently it gets done," he said.

"Talk to your customers and your advertisers, talk to them more consistently, talk to them continuously, if possible, and learn how their needs are changing ... Build and adapt your strategy around that feedback that you get. Same thing with advertising."

- 2) If your company is not offering mobile products, start by outlining a strategy for mobile (and digital as a whole, if you don't have it yet). The issue of digital media strategy development and implementation lies beyond the scope of this report, so you might need to consult specific literature on management and digital media economy, such as "Saving Community Journalism: How Newspapers Can Make Money Again" by Penelope Muse Abernathy¹⁷¹.

Prior to developing your mobile strategy, ask yourself, your management and employees the following questions:

- What do we want to build? Shall we just make the existing website mobile-friendly? Or would we like to build something else (an app) from the ground up?
- How important is swift financial return for us on this project? If you'd like to get your money back fast, you shouldn't be pursuing mobile in the first place, unless you invent your own unique monetization model.

- Who will be in charge of all mobile efforts? Will that person be fully supported by management, or will he/she have to fight internal procedures most of the time, instead of innovating?
- How would your readers interact with the site from their mobile devices? Is there a way to improve their experience (e.g. make font size adjustable in the app? offer immediate mobile notifications about the important stories? etc.)?
- What specific goals are you pursuing with your effort (monetization, expanding digital reach, experimentation) and how are you going to track their completion?

3) It's crucial for newspaper managers to break that vicious circle of daily grind and carve out time for strategic decisions.

"People who run newspapers and other news outlets have a lot of stuff they have to do every day, but the market is not going to say: 'Well I understand, you couldn't advance because you were busy that day,' you have to figure out the way to do it," said John Drescher, the executive editor of *The News & Observer*.

"We all understand and sympathize" with overburdened newspaper publishers, said Williams. "But what's going to be the new path forward for them? If they're always too busy and the business is too stressful in the moment ... they're just continuing down this path, down into ... either a slow and steady decline or eventually maybe a more dramatic and precipitous decline."

4) Consider opening an intern position or work with colleges in your area to bring in young, digital savvy staff (even temporary employees) to coordinate and inspire mobile developments.

You don't have to have a designated full-time staffer to deal with mobile, and if implemented properly (e.g. fully integrated into the existing website system), additional staff load might be minimized.

You will need digital- and mobile-savvy employees to further implement your mobile strategy: build, support, enhance and sell your mobile products.

Consider proper personnel training, giving them mobile devices and asking them to test out your company's digital products.

5) If you don't have any mobile products, consider starting a mobile-friendly responsive website or an application ("native app") for popular mobile platforms (see the next suggestion for details). An app is more flexible and can have more features, while the site is a versatile and a more cost-efficient solution.

Williams recommends building whatever your audience would like the most: “Go talk to your audience, to your customers, and find out where they do more of their mobile consumption and spend more of their mobile time, for news and information. Is it in native app experiences or is it in the browser?”¹⁷²

- 6) When choosing the platform for your mobile apps, you should ideally be shooting for both of the most popular mobile platforms out there, Apple iOS and Google Android. The latter is slightly more popular in the U.S. (with 52% market share)¹⁷³.

If you’d like to just pick one to start, take a look at your website’s statistics (use Google Analytics or embedded tools) and examine the operating system distribution, in terms of Android users vs iOS users.

Another option would be setting up a temporary poll on your website or randomly surveying your readers.

- 7) If you’re not building your mobile product in-house (which may be a viable decision, depending on your staff and their expertise), choose your provider carefully. Would you rather have an integrated content management system for both digital and mobile, or would you be okay with these parts separated?

If your mobile product is not overly complex and doesn’t have to be seamlessly integrated into existing operations software (such as online content management system), consider outsourcing your project to a freelancer. There’s plenty of specialized websites that help freelancers and prospective clients find each other¹⁷⁴.

“They may not be full-serve vendors like Verve or StepLeader or some of the others I know of, that do this for much bigger media properties, but maybe they can help build infrastructure or at least sort of a support system or add certain features to the mobile experience,” said Williams.

The market offers multiple DIY tools¹⁷⁵ for companies that are willing to quickly assemble their own mobile apps, but don’t have expertise in mobile development. Using these products could help cut development costs significantly and swiftly roll out mobile applications of reasonable quality.

For many newspapers without a significant digital or mobile footprint, it might be a good idea to stick with trusted and widely used content management platforms, such as WordPress¹⁷⁶. With the use of responsive design templates, WordPress-based sites can be easily turned into mobile-friendly resources at an immensely competitive price¹⁷⁷.

- 8) When your company builds corresponding expertise in digital and mobile, consider offering digital marketing agency services to your advertising clients: BIA/Kelsey estimates a \$2 billion market opportunity for newspapers in that niche by 2016¹⁷⁸.

These services include mobile marketing, analytics, branding, mobile-optimized website consulting and production, content marketing, search engine marketing and so forth¹⁷⁹. BIA/Kelsey recommends collaborating with partners in delivering these services to ensure quality.

Williams warns it's important to remain focused and not to rush into this model, especially if the expertise is lacking. "If building a local restaurant's website and running their Facebook page, and running their SEO, and running their Google AdWords spend – if none of that is your core competency, and you really haven't done any of that historically, and then one day you snap your fingers and you start wanting to do all of that ... just because you want to doesn't mean you're capable of doing it effectively," he said.

"If your sales [are] struggling to sell digital, do you really want them trying to sell 15 different digital products? Would you rather they really focus on three or four?" said Williams. "Start with selling your own inventory then get into some different forms of digital monetization, including mobile, that are truly effective for your advertisers."

- 9) When building mobile products, Ken Doctor recommends "designing – separately – smartphone and tablet experiences from the ground up, instead of repurposing" and also designing "ad experiences that play to how we use phones and tablets."

"Local news media must ... make themselves the local go-to check-in app, earning that loyalty with speed, smarts and depth," he said.

Bigger newspapers in other states are building their mobile apps not necessarily around news. For example, Tribune's RedEye Chicago¹⁸⁰ provides extensive information on city transit and dining - news is only one of four main tabs. According to BIA/Kelsey, in 2013, the application was downloaded more than 140,000 times. It is monetized through sponsorships and ads.

The Dallas Morning News offers SportsDayHS app¹⁸¹ that is built around high school sports. It features staff-covered game updates, live scoring info, rankings and more. The app brings in revenue through sponsorships and ad placements.

- 10) George Brock, the head of the Journalism School at City University of London and the author of “Out of Print,”¹⁸² recommended newspapers leave behind the bulky “innovation process” and embrace swift experimentation.

“If you bellow at people that they should innovate, mostly they freeze; if you say, however, ‘what you should be doing is experimenting’ that’s much easier to organize. Media companies are very bad in experimentation,” he said.

He suggested that the innovation budget could be effectively split into ten, “and each bit given to somebody under the age of 28, let’s say, to do with anything they could find that might be useful, that might improve the reading experience of the people who consume whatever they produce.”

“Eight of those projects will be no good. The ninth one might be okay, might not. If you got a tenth that works, that’s a hit, that’s a success, that’s real experimentation – and media companies find that incredibly hard,” Brock said.

- 11) John Drescher, the executive editor of The News & Observer, said that tablets may be a platform of particular interest for newspapers.

“The tablet reading experience is far more immersive and people stay on their tablet for a long period of time,” Drescher said.

“People tend to go to their phone just for a quick hit, kind of for a headline and a few sentences, but they go to the tablet for a deeper reading experience, more like a print newspaper reading experience, so obviously that’s a strength that we have,” he said.

- 12) When selling ads in mobile products, it may be a good idea to consolidate offerings (“bundling”), rather than have different people selling different ad inventories (i.e. print and digital). By offering comprehensive multiplatform packages (for example, print+online+mobile), newspapers could improve the efficiency of advertisements to 50% or more¹⁸³, allowing newspapers to charge at least 20% extra premium for the added value.

To successfully transition to the bundled model, newspapers “will need to reposition themselves as cross-platform advertising mediums,” Jed Williams has said¹⁸⁴.

And a number of news organizations are getting there. John Drescher, the executive editor of The News & Observer, said that his newspaper “effectively bundled the print sales with the digital sales.” However, he noted that it “might only be a short-term solution.”

Bundling may also effectively make your inventory leaner. The size factor might be important: “If your sales [are] struggling to sell digital, do you really want them trying to sell 15 different digital products? Would you rather they really focus on three or four products and services,” said Williams.

- 13) While it does pay off sometimes to use caution in navigating through uncharted waters of new technologies, don’t be passive about mobile. The survey respondents and experts were unanimous about that.

“To pretend that mobile is a niche, and one that can be added some time in small increment, is a fantasy. Journalists, and publishers, don’t get to live in a fantasy world,” said Ken Doctor.

“In the denial of the centrality of mobile in news publishing, I see – and wish I didn’t – what I saw as the news industry has been too late to the party in search, social, city guide, aggregation, native advertising and just about every other innovation that has roiled our world. It’s too small a niche, too small a niche...; and then in a blink of an eye, it’s too late,” he said.

Jed Williams agreed: “Newspapers ... have a well-documented history of being slow to these new platforms and ... these new channels.”

“Is it really about whether you think you should be there or not, or is it about where your customers and your audience already are? If you want to maintain brand and audience loyalty and build new readers and new audience, which is really gonna be the future of your business ... expanding the audience demographics that you reach, if you’re going to do that, you have to be mobile now; frankly, you needed to be mobile yesterday, you certainly need to be mobile now and you’d better be mobile tomorrow,” he said.

John Drescher thinks that there are reasons for optimism.

“When you look at the growth in digital advertising and then when you look at the growth in digital subscriptions, it comes to be a pretty nice increase in revenue for most of us. That’s a pretty nice trend line to see that growth in digital advertising and digital subscription revenue. I don’t know if there is a silver bullet out there, probably not, but who knows?”

APPENDICES

I. Study Design, Method and Limitations

This study sought to provide a broad exploratory account of mobile adoption by community newspapers in North Carolina. It sought to identify strategies and attitudes toward the implementation and subsequent monetization of mobile media products and/or services among the newsroom managers and publishers in the state. Accordingly, this study addressed the following set of questions:

- What mobile products (services) do community newspapers currently offer?
- To what extent are community newspapers satisfied (dissatisfied) with their existing mobile products (services)?
- What mobile products (services) do community newspapers plan to provide in the near future?
- Are community newspapers getting revenue from mobile products (services) and in what ways?
- Do community newspapers have strategies for implementing mobile products (services), what are these strategies and how developed are they?
- Do community newspapers perceive mobile products (services) as important to their success in the future?
- What factors influence managerial decisions about the development of mobile products (services) by community newspapers?

To answer these questions, the study utilized a mixed-mode approach, combining quantitative methods (survey, content analysis) and qualitative interviews.

The survey of community newspaper managers and editors utilized an expanded meaning of the term “community newspapers,” as suggested by Abernathy¹⁸⁵. These include “newspapers that serve specific geographic, ethnic or cultural communities” compared to the traditional understanding of the term, “Newspapers with a circulation of 50,000 or less”¹⁸⁶. The broader approach of this study essentially removes size limitations and allows the exploration of a wider variety of newspapers, from small rural weeklies to large dailies covering multiple counties and large urban areas.

The study used the full sample (census) of NC newspapers based on the representation in the *Editor and Publisher Newspaper Data Book 2013*¹⁸⁷. Some newspapers were excluded from the census for various reasons, such as stopping their publication or merging with other newspapers (see Appendix II for details).

SURVEY

The two-phased survey of newspaper executives started in late November 2013 and

concluded in March 2014. It relied on Dillman's Tailored Design Method approach¹⁸⁸, employing a mail survey as the main mode. This method was appropriate because of the reasonable implementation costs, reduced coverage error (some people tend to pay more attention to mail than email and thus might join the survey even if they miss an email) and potentially higher response rates. Moreover, this approach helped to reduce nonresponse error by allowing respondents to select their preferred survey mode.

According to the summary by the Bureau of Labor Statistics in regards to establishment surveys, paper mail had a 44% response rate, three times more than the second-most efficient – Web (13%). Thus, mail was chosen as a primary mode for this survey, with a range of alternative options offered to participants. These additional modes included web, phone or fax. The study design included, as the Tailored Design Method suggested, several standard stages. Every person in the sample was contacted initially with a preliminary email (pre-notice letter), where the suggested design approach (mail) was introduced, and prospective participants were given an opportunity to choose the preferred contact mode (web, phone, fax) or opt out of the survey. A pre-notice outlined the study goals and benefits.

In the next phase, a first-class mail letter was sent to the whole sample, excluding participants that opted out or those that had chosen a different survey mode (e.g. web). The mailing included an invitation letter, a paper questionnaire (the questionnaire remained essentially the same, with slight deviations due to the nature of each mode) and a return envelope.

Participants were incentivized by early access to a summary of the study results, combined with a set of suggestions on media for media organizations. No monetary incentive was used for the survey, following Adams¹⁸⁹, Graybeal¹⁹⁰ and guidelines in Dillman¹⁹¹. The study followed the mail preference model (no Internet link in the first letter) suggested by Dillman. This approach was expected to produce a better response rate, as some examples showed. In one study, when a link wasn't provided in the first letter, response rate reached 71%; in another similar study, when the link was used in the first letter, response rate totaled 55%¹⁹².

In this survey, people who indicated online as their preferred method received a link by email instead of a paper letter. For all the follow-up mailings and calls, immediately excluded were the individuals who explicitly opted out of participation, those who chose a different contact mode (e.g. those who said they'd prefer email didn't receive any additional paper mail) and those who had already completed the survey. A postcard reminder followed several days after the initial mail contact. It included a link to the electronic version of the survey¹⁹³. An email with a similar text was sent out seven days following the reminder postcard. The second phase of the study took place in January-March 2014; it included mailing a replacement questionnaire and a final telephone call¹⁹⁴.

The survey elicited responses from 81 out of 247 newsroom managers initially contacted; participants represented 75 newspapers from 69 locations in North Carolina. There were 32 daily (40%) and 49 non-daily (60%) newspapers represented. The response rate for

individual participants reached 33% (40% if adjusted to the effective sample size) and reached 45% for newspaper organizations. Most (N=52, 64%) of the respondents preferred a paper version to a web-based survey (N=29, 36%).

There were six newspapers represented in the survey by responses from both participants initially contacted (generally, a publisher and an executive editor). According to the study design, when one person from any newspaper answered, the subsequent contacts to reach other prospective participants from the same organization ceased. In some cases, however, both managers replied as a response to the initial contact. The main study focus was the newspaper strategy as a whole, so only the answers of publisher-role respondents from these newspapers were considered in further analysis of answers to the newsroom-related questions. The whole sample, without excluding these six participants, was used for the analysis of individual questions (i.e. age, personal attitudes to mobile, etc.).

With the average age of respondents being 51 years, they've spent more than half of their lives working in the media business (27 years). Respondents worked in their companies, on average, for 15 years, and on their respective positions for 11 years. Participants reported high levels of involvement in making publishing and editorial decisions, with a slightly lower degree of participation when partaking in decisions on digital and mobile strategy.

CONTENT-ANALYSIS OF NEWSPAPER WEBSITES

Supplementary content analysis helped to examine the level of mobile adoption of those community newspapers that did not participate in the survey. Websites of all newspapers in the census (N = 166, see below) were examined manually by one coder for links to their mobile products. Following the codebook (see Appendix V), each newspaper was examined on several parameters:

- Availability of a website;
- Availability of a designated mobile website;
- “Responsiveness” of the website;
- Availability of mobile/tablet apps (Apple, Android, other platforms);
- Discoverability of mobile products (is there a link to a mobile app? does a reader gets redirected to a mobile version automatically?);
- Ownership and circulation (does a newspaper belongs to a chain or is it independent).

Coding took place in February-March, 2014. Websites of newspapers and application availability were identified using Google.

A smartphone (Windows Phone 8-based Nokia Lumia 520, browser – Internet Explorer) and a laptop computer (Windows 8-based, browser – Google Chrome) were used to test auto detection of redirection to mobile website versions and responsiveness of each website's design.

INTERVIEWS

In order to further substantiate findings and clarify and enrich them with more context, qualitative interviews were set up with select newspaper managers and media experts. Given the supplemental nature of the qualitative component of this study and the limited access to subjects (people in managerial positions with obvious time restraints), the initial interview sample was limited to 4 participants. As of March 2014, the interviews with the following people were conducted:

John Drescher (Executive editor, *The News & Observer*)

Bill Horner III (Publisher, *The Sanford Herald*)

Michael Powell (Editor, *The Cherryville Eagle*)

Jed Williams (Vice President of Strategic Consulting, Senior Analyst, BIA/Kelsey)

The following people commented on several important issues for the report:

George Brock (Head of Journalism, City University London)

Ken Doctor (News Media Analyst, Newsonomics.com)

Beth Hunt (Manager of Editorial Operations, American City Business Journals)

LIMITATIONS

The nature of the study population, busy business-minded managers, negatively impacted the response rate (33%), limiting generalizability of the study findings and the statistical power to draw inferences. However, the percentage of returned surveys in this study was significant, on par with response rates in similar studies conducted by Graybeal¹⁹⁵ – 8.9%, Adams¹⁹⁶ – 29.5%, Gade¹⁹⁷ – 39.5% and White¹⁹⁸ – 44%. When the original sample was decreased after filtering out some media organizations for a variety of reasons (see Appendix II), effective response rate reached 40%. Multiple individuals for some organizations were surveyed; when looking at just the number of organizations that responded, and not the total number of people contacted, the response rate reached 45%.

The use of the *Editor and Publisher Newspaper Data Book 2013* limited the sample as some newspapers were not included on their list; it has also turned out that some data about newspapers was inaccurate (see details in Appendix II). Due to self-selection, the survey subsample was skewed toward newspapers offering mobile products: 55% of these newspapers returned the survey, compared to just 36% of newspapers with no identifiable mobile products. The survey participant self-selection subsample was also skewed toward daily newspapers: 54% of them returned the survey, compared to a 35% response rate of

newspapers with different publishing schedules (weeklies and others). Nearly three quarters (72%) of North Carolina newspapers in the sample were not publishing daily. Still, the total circulation of dailies in the state comprised 55% of all newspaper circulation.

Newspapers that serve specific ethnic groups were barely represented in the *Editor and Publisher Newspaper Data Book 2013* and were not treated specially in this project. According to some accounts¹⁹⁹ the level of mobile adoption in these newspapers might differ from the average.

In addition, this study didn't address the possible relationship between the level of mobile adoption by a newspaper manager and its influence on the whole organization's strategy in mobile. The study also didn't explore mobile adoption by individuals in newsrooms and their influence on mobile adoption by their organizations as a whole.

This study was aimed specifically at providing a general picture of mobile adoption by North Carolina community newspapers and attitudes towards mobile of local media managers. However, as the importance of mobile as an emerging medium for news is booming, scholars and industry practitioners should consider further exploration of the field, perhaps in a more focused way. Which mobile products are the easiest to monetize? Which are the most liked by audience? What ingredients (and in what proportion) make a mobile news product successful? What is the best (easiest, cheapest, fastest yet still efficient) way for a newspaper to adopt mobile?

All these questions lie outside of scope for this study, but answering them would be beneficial for community newspapers and their readers, both in North Carolina and nationwide.

II. Sample

Newspaper executives (senior editors and publishers) were the units of analysis for this study. A census was used for the survey's initial sample, based on the data from the *Editor and Publisher Newspaper Data Book 2013*²⁰⁰.

According to the approach employed, any non-trade-specific newspaper in the state was considered a community newspaper when it served the needs of a certain community (people who live in the designated metro area, people of a certain ethnicity, people who work and study in a university and so on). Daily newspapers serving specific communities were also included in the survey. The total size of the initial sample was $N = 247$ individuals, who were publishers, general managers, executive editors, managing editors and editors of North Carolina newspapers. No more than two managers were selected for each newspaper. After someone from a newspaper responded, the other person at the same newspaper was removed from the subsequent contacts list because the study focused more on organizations rather than individuals.

When there was no information about a newspaper's management in *Editor and Publisher Newspaper Data Book 2013*, and (or) the information couldn't be fully confirmed online, the publication was excluded from the sample. Newspapers were also excluded from the sample when mail was returned undelivered or when there was no information about their updated postal addresses on the Internet. *Ashe Mountain Times*, *Times-News*, *Charlotte Business Journal*, *Triangle Business Journal*, *The Business Journal – Greensboro*, *The Smithfield Herald*, *Southwest Wake News*, *Lake Gaston Gazette-Observer*, *Rhinoceros Times*, *Creative Loafing Charlotte*, *Yancey Common Times Journal*, *Pender-Topsail Post-Voice* were all excluded for that reason.

The contact information of managing editors and publishers was taken from *Editor and Publisher Newspaper Data Book 2013*, from the "daily newspapers" and "weekly newspapers" volumes. Some additional data (updated emails, telephone numbers, and addresses) was looked up manually on the Internet. When two or more newspapers were created by the same newsroom with the same editors-publishers, only the bigger newspaper was included in the sample: *The Weekly Herald* "included" *The Enterprise & Weekly Herald*, *Mount Airy News* "included" *Surry Scene*, *The Observer-News-Enterprise* "included" *Outlook*, *The Eden Daily News* "merged" with *Reidsville Review*, *Cashiers Crossroads Chronicle* "merged" with *Crossroads Chronicle*, *The Butner-Creedmoor News* "included" *Independent Tribune*, *The Red Springs Citizen* included *Eden News*.

In the case of a single publisher or general manager controlling several newspapers, the person was excluded on subsequent occurrences (alphabetically); however, some participants were still inadvertently contacted more than once.

Statesville Record & Landmark was excluded from the sample due to a technical error. *The Carrboro Citizen* was removed from the list despite being properly listed in the data book because the newspaper ceased to exist in October 2012. *The Beaufort-Hyde News'* last edition was published on November 27, 2013, and was also excluded.

As the result of all aforementioned adjustments that took place before and throughout the survey process, the final effective size of the census (full sample) shrank to 201 managers from 166 North Carolina newspapers.

III. Data Tables

These tables represent actual quantitative results from the studies: the survey (1-12) and the content analysis (13-14).

In tables, "N" reflects the number of corresponding participants, while "%" represents a respective share in percent that N constitutes of " N_{TOTAL} ", the total number of participants who answered that specific question. N_{TOTAL} is reported either for the whole set of questions or, when its value varies, on a question-per-question basis. N_{TOTAL} is reported in italics for reader convenience.

“M” refers to the mean value of a particular variable. If the value of M lies in the range between 1 and 5, it means that for this answer a Likert type agreement scale was used. In that case, participants were asked to mark their agreement level with a statement based on a following scale: strongly disagree (1), disagree (2), neither agree nor disagree (3), agree (4) or strongly agree (5). For example, overall level of “3.5” means that most of participants’ answers fell between “3” (neither agree nor disagree) and “4” (agree).

When analyzing the data one should consider standard deviation (SD): it represents how far the answers spread from the mean value. The lower the SD, the closer are the values to the mean, M. Percentages might not add up to 100% due to rounding and in cases with several answer options permitted.

Table 1. Survey Demographics

	M	SD	N_{TOTAL}
Age, full years	51.25	9.72	81
Working experience, full years			
in the media business	26.77	10.83	81
in current role	11.34	9.96	81
in current organization	14.54	11.58	81
Degree of involvement in making			
publishing decisions	4.46	1.06	80
editorial decisions	4.52	0.96	81
decisions on digital strategy	4.19	1.05	81
decisions on mobile strategy	4.05	1.09	81

Table 2. Mobile Device Ownership

	N	%	N_{TOTAL}
A survey participant owns:			
a cellphone	10	13	80
a smartphone	72	90	80
a tablet	55	69	80
a different mobile device	4	5	80

Table 3. Personal Mobile Adoption

	M	SD	N_{TOTAL}
Experience with mobile phones, full years	13.04	5.54	80
A participant			
thinks that using mobile devices is easy	4.30	0.82	80
is a daily user of Internet on mobile devices	4.05	1.36	79
uses applications (apps) on mobile devices	4.20	1.20	80
feels unproductive without his mobile device	3.58	1.29	80

started using mobile before colleagues 3.19 1.22 79

Table 4. Mobile Product Availability (Self-reported)

	Providing		Planning to		Not providing	
	N	%	N	%	N	%
Any mobile product	46	61	10	13	19	25
A responsive (“Mobile-friendly”) website	38	51	13	17	24	32
A mobile application	24	32	20	27	31	41
A tablet application	21	28	13	17	41	55
Something else	1	1	1	1	73	97

Please note that 26 out of 46 newspapers listed in Table 4 were providing more than one mobile product. Other options mentioned (“Something else”) were “Mobile App Facebook” (“already providing”; likely referring to a newspaper’s Facebook page) and “Calendar of events” (“planning to provide”).

Table 5. The Most Successful Mobile Products (Self-reported)

	N	%
A mobile website (responsive or standalone)	18	55
A mobile application	11	33
A tablet application	1	3
Other (Facebook-based mobile application, online edition)	3	9

$N_{TOTAL} = 33$

Table 6. Mobile Product Economics and Attitudes

	Strongly Disagree		Disagree		Neither Agree Nor Disagree		Agree		Strongly Agree		N_{TOTAL}
	N	%	N	%	N	%	N	%	N	%	
Referring to a participant newspaper's mobile product:											
It will be profitable in the next 2 years	4	9	5	11	19	42	9	20	8	18	45
We're not sure how to monetize it	6	13	6	13	17	35	12	25	7	15	48
It is important to our future financial success	2	4	4	8	11	22	22	45	10	20	49
We plan to build at least one in the next few years	4	6	5	8	26	39	16	24	15	23	66

Table 7. Monetization Models of Mobile Products

	N	%	N_{TOTAL}
A survey participant's mobile product is producing revenue	27	54	50
through advertising	23	85	27
by charging users once (application price)	3	11	27
by charging users periodically (subscription)	14	52	27
by getting money from sponsors	5	19	27
through other methods	2	7	27

“Metered access” and “Selling ads on standard website that can be viewed on mobile” were mentioned as other methods in Table 7.

Only those who “agreed” that they were planning to build mobile products soon were asked the questions in Table 8:

Table 8. Mobile Implementation Readiness

	"YES"		"NO"		"DON'T KNOW"	
	N	%	N	%	N	%
Referring to a planned mobile product, a survey participant's newspaper						
has a specific plan on how to implement mobile	13	43	12	40	5	17
has a specific plan on how to make it profitable	9	30	14	47	7	23
knows exactly what they're going to build	5	17	18	60	7	23
plans to build a mobile product on their own	5	17	20	67	5	17
has a designated person who oversees mobile	23	77	7	23	0	0
<i>N_{TOTAL} = 30</i>						

Percentages do not sum up due to multiple choice options. Answers like “all of the above” (e.g. ROI, costs, additional workload) were excluded. There is a possibility that results were affected by examples used in the question. The full question was worded like this: “When making decisions about your company’s strategy in mobile, what are the main factors you consider? (e.g. ‘ROI’, ‘costs’, ‘additional workload for staffers’...)”.

Table 9. Factors Influencing Mobile Decisions

	N	%
Costs	35	56
Staff workload or availability	30	48
Return on investment (ROI)	25	40
Audience readiness	8	13
Revenue opportunities	7	11
Corporate strategy	4	6
Staying relevant	2	3
Other factors	24	39
<i>N_{TOTAL} = 62</i>		

Other factors included:

- “Giving our readers and customers what they want, as we charge for our digital products”
- “What do readers want and expect from their primary source of local news and information?”

- “How well it can push users to our printed product”
- “Post-recession economy”
- “Visibility”
- “Branding”
- “Lack of time and expense of providing higher quality app”
- “With the rise of smartphones (or iOS/Android devices) that are capable of fully displaying our website, we have no need to waste resources developing for a specific mobile requirement.”
- “Knowledge”
- “Still getting subscribers. Hard copy. I do not put things online. Too much cost.”
- “Impact on core print publication”
- “Outreach. Marketing.”
- “Logistics - how to bring it together and make the best use of the product.”
- “Readers aren't ready; don't want to dilute printed product”
- “Money”

Only newspapers that reported having a mobile product were supposed to answer questions in Table 10:

Table 10. Existing Mobile Product Satisfaction Level

	Strongly Disagree		Disagree		Neither Agree Nor Disagree		Agree		Strongly Agree		<i>N</i> _{TOTAL}
	N	%	N	%	N	%	N	%	N	%	
Referring to a participant's mobile product:											
the number of its users is growing	0	0	3	6	10	21	17	35	18	38	48
it is essential for customer satisfaction	1	2	5	10	16	33	19	39	8	16	49
it helps do better news reporting	1	2	6	12	18	36	16	32	9	18	50
it is popular	1	2	4	8	15	31	19	40	9	19	48

Table 11. Beliefs About Mobile and Social Media

	Strongly Disagree		Disagree		Neither Agree Nor Disagree		Agree		Strongly Agree		<i>N</i> _{TOTAL}
	N	%	N	%	N	%	N	%	N	%	
It's important for a media company to have a mobile presence	0	0	2	3	5	7	25	34	42	57	74
Users like mobile products	1	1	1	1	26	36	29	40	16	22	73
"I'd recommend other media execs to create a mobile product"	2	3	1	1	19	27	27	38	22	31	71
It's important for a media company to have a social media presence	1	1	4	5	10	14	27	36	32	43	74

In Table 12, *N*_{AGREED} and %_{AGREED} represent, respectively, the number and the share of respondents who “agreed” or “strongly agreed” with the following statements:

Table 12. Newsroom Situation

	M	SD	N_{AGREED}	%_{AGREED}	N_{TOTAL}
Referring to a survey respondent's newsroom:					
its staff is comfortable with mobile	4.19	0.77	63	84	75
it fosters innovation	3.59	0.87	37	49	75
its financial resources are shrinking	4.12	0.89	59	79	75
it didn't have issues with funding staff	2.55	1.18	18	24	74
it has been cutting costs	4.21	0.93	63	84	75
it is using up-to-date newsroom equipment	3.13	1.02	30	40	75

Following tables are based on the content-analysis of community newspaper websites (N_{TOTAL} = 166):

Table 13. Mobile Product Offering (by publishing schedule)

	N	%
Newspapers that offer mobile products	81	49
Daily newspapers	40	24
Weekly newspapers	41	25
Newspapers that don't offer mobile products	85	51
Daily newspapers	6	4
Weekly newspapers	79	48

Table 14. Mobile Product Offering (by product type)

	N	%
Mobile websites (standalone)	47	28
Responsive websites	19	11
Applications (at least one)	32	19
for iPhones/iPods	30	18
for iPads	6	4
for Android devices	23	14
for Windows Phone devices	2	1
Text alerts	8	5

For additional data and maps please refer to an interactive web presentation of results at <http://www.nickky.com/mobileadoption>.

IV. Survey Questionnaire

Dear PARTICIPANT,

Thank you for taking this survey! It should take you about 10 minutes to complete.

Let's get started! First, please tell us about your personal experience with mobile.

1) When did you start using mobile phones?

I started using them about ____ years ago.

2) What mobile devices do you own?

- Cellphone (simple mobile phone, you cannot install software on it) ☐
- Smartphone (you can install apps on it - iPhone, Android or similar device) ☐
- Tablet (Apple iPad, Kindle Fire, Google Nexus or similar device) ☐
- Something else: _____ ☐

Please tell us about your personal experiences with mobile. Circle the number that best reflects your experience:

*1 – strongly disagree, 2 – somewhat disagree, 3 – neither agree nor disagree,
4 – somewhat agree, 5 – strongly agree. If you don't know, leave it blank*

3) Using a mobile device is easy.	1	2	3	4	5
4) I use my mobile device to access the Internet on a daily basis.	1	2	3	4	5
5) I use apps on my mobile devices.	1	2	3	4	5
6) It would be hard for me to remain productive without my mobile device.	1	2	3	4	5
7) I used a mobile device before most of my colleagues started using them.	1	2	3	4	5

Thank you! Let's move on to the next section, which focuses on your newsroom. Do you agree or disagree with the following statements? Circle the number that best reflects your agreement with each statement:

*1 – strongly disagree, 2 – somewhat disagree, 3 – neither agree nor disagree,
4 – somewhat agree, 5 – strongly agree. If you don't know, leave it blank*

8) My colleagues in the newsroom are comfortable using mobile devices.	1	2	3	4	5
9) Our newsroom fosters innovation.	1	2	3	4	5
10) Financial resources in my newsroom have been shrinking over the past few years.	1	2	3	4	5
11) Over the past few years, we did not have issues with funding the newsroom staff.	1	2	3	4	5
12) Over the past few years, we have been cutting costs.	1	2	3	4	5
13) We use up-to-date newsroom equipment (such as the latest smartphones, telephones, laptops, cameras etc.) in our business.	1	2	3	4	5

It's very important for us to know what mobile efforts you are already making at and what your company's general strategy is regarding mobile technology.

If your organization doesn't have any mobile products, please proceed to question 25.

14) What mobile products do you provide, or plan to provide, to your readers?

	Already providing	Plan to develop
– Responsive ("Mobile-friendly") web site	<input type="checkbox"/>	<input type="checkbox"/>
– Mobile application	<input type="checkbox"/>	<input type="checkbox"/>
– Tablet application	<input type="checkbox"/>	<input type="checkbox"/>
– Something else: _____	<input type="checkbox"/>	<input type="checkbox"/>

If your organization is already providing at least one mobile product, please tell us about it.

15) What is the single most successful mobile product your company offers?

Now please specify the degree to which you agree or disagree with the following statements about the product you identified in the previous question by circling the appropriate number:

*1 – strongly disagree, 2 – somewhat disagree, 3 – neither agree nor disagree,
4 – somewhat agree, 5 – strongly agree. If you don't know, leave it blank*

16) The number of customers using our mobile product is growing.	1	2	3	4	5
17) Our mobile product is essential for customer satisfaction.	1	2	3	4	5
18) Our mobile product helps us do better news reporting.	1	2	3	4	5
19) Our mobile product is popular.	1	2	3	4	5
20) We expect our mobile product to be profitable in the next two years.	1	2	3	4	5
21) We're not sure how to make money from our mobile product.	1	2	3	4	5
22) Our mobile product is important for our financial success in the future.	1	2	3	4	5

23) Does your mobile product produce revenue?

No ☐

Yes ☐ *If yes, what business model do you use? Please check everything that applies:*

We sell ads in our product ☐

We charge our users for the product *once* (i.e., per app download) ☐

We charge our users for the product *periodically* (i.e., subscription) ☐

Our sponsors support the product

☐

Something else: _____

☐

24) If you have more than one mobile product (even unsuccessful/cancelled) which is different from the one you described above, please tell us about it:

What is driving your mobile decisions?

25) When making decisions about your company's strategy in mobile, what are the main factors you consider? (e.g. "ROI", "costs", "additional workload for staffers" ...)

How important do you think technology is for a media company? Please tell us to what degree you agree or disagree with the following statements by circling the respective number.

*1 – strongly disagree, 2 – somewhat disagree, 3 – neither agree nor disagree,
4 – somewhat agree, 5 – strongly agree. If you don't know, leave it blank*

26) It is important for a modern media organization to have a mobile presence.

1 2 3 4 5

27) Users like it when media companies roll out mobile products.

1 2 3 4 5

28) I would recommend other media executives to consider developing mobile products for their audiences.

1 2 3 4 5

29) A strong presence in the social media field (profiles on Twitter, Facebook, etc.) is important for a media organization nowadays.

1 2 3 4 5

30) My company plans to create at least one mobile product in the next couple of years.

1 2 3 4 5

If you answered "4" or "5" in question 30 (the company does plan to invest in mobile), please tell us about how you are going to approach the goal:

No Yes Don't Know

31) Do you have a specific plan for how to implement mobile?

☐

☐

☐

32) Do you have a specific plan on how to make it profitable?

☐

☐

☐

33) Do you know exactly what you want to build?

☐

☐

☐

34) Are you going to build the product on your own?

☐☐☐

35) Do you have a designated person who oversees mobile efforts in your company?

☐☐☐

Thank you! We're almost finished. It's very important for us to know how newsroom management experience affects your attitude to mobile. Please share additional information about yourself and remember that it will remain confidential.

36) What's your age?

___ full years

37) How many years have you been working in the media business?

___ full years

38) How many years have you been working in your current role?

___ full years

39) How many years have you been working at ?

___ full years

Please share some details about your current position and managerial capabilities. Please tell us to what degree you are currently involved in making the following decisions.

*1 – not involved at all, 2 – somewhat uninvolved, 3 – neither involved nor uninvolved,
4 – somewhat involved, 5 – very involved*

40) How involved are you in making publishing decisions?	1	2	3	4	5
41) How involved are you in making editorial decisions?	1	2	3	4	5
42) How involved are you in making decisions on digital strategy?	1	2	3	4	5
43) How involved are you in making decisions on mobile strategy?	1	2	3	4	5

44) What else would you like to add about the usage of mobile devices or the implementation of mobile products in your company?

After the survey data have been analyzed we can provide you with a report on the findings and offer some suggestions about areas to improve. Would you like a copy?

Yes, please send me the survey results here: _____

Thank you so much for your time! Please return the completed survey in the envelope provided.

V. Codebook

Format: VARIABLE_NAME [VALUES] Description.

- 1) ID [XXX] A newspaper's identification number from the sample spreadsheet. If there are two entries for the same newspaper in the spreadsheet (publisher and editor), the first ID shall be used.
- 2) NEWSPAPER – The name of the newspaper.
- 3) DATE [MM.DD.2014] The date when the website was accessed.
- 4) WEB [URL or NO = 0] A web address (URL) of the newspaper's website. "0" should be used in the case when a website cannot be found with Google search.

If the newspaper provides different websites for mobile devices and desktop computers, this variable should list an address of a mobile-optimized website.

- 5) IS_RESPONSIVE [YES = 1, PARTIALLY = 0.5, NO = 0] Does the website have specific optimization features for mobile ("responsive design")? Responsive websites typically offer mobile-readable (large) font sizes, auto scaling that fits content to small screen sizes, auto redirection to a mobile version when accessed from a smartphone. An example of responsive website: www.nando.com. An example of a website that is not responsive: www.hcpress.com. If a website has some responsive features, but does not work correctly or there are other

issues, this variable should be set to “0.5” (PARTIALLY).

If a newspaper offers different websites for mobile and desktop users, only the mobile-optimized website should be evaluated here (the URL in WEB variable).

Responsiveness should be tested on a Windows Phone handset Lumia 520 with the most up-to-date version of the Internet Explorer browser with default settings. If there are platform-related concerns about responsiveness (“0.5”), the website should be also tested on other mobile devices (Android-based devices, iPhones/iPads, etc.) Additional testing may be performed on a laptop with Chrome browser.

- 6) MOBILE_PRODUCT_AVAILABLE [YES = 1, NO = 0] Are there any signs of a mobile product available for the readers on the newspaper’s website? (banners, menu items, links to the application)

If no mobile product is available (“0”), stop coding.

- 7) TYPES – What types of mobile products are offered?
- a. APP_IPHONE [YES = 1, NO = 0] Is there a specific mobile application for iPhone/iPod Touch devices? (Only if available in AppStore, search “NewspaperName App Store” to check)
 - b. APP_IPAD [YES = 1, NO = 0] Is there a specific mobile application for iPad devices? (Only if available in AppStore, search “NewspaperName App Store” to check. To be considered a tablet app, optimization for tablets should be explicitly stated in the description)
 - c. APP_ANDROID [YES = 1, NO = 0] Is there a specific mobile application for Android-based devices? (Only if available in Google Play, search “NewspaperName Google Play” to check)
 - d. APP_WP [YES = 1, NO = 0] Is there a specific mobile application for Windows Phone-based devices? (Only if available in Windows Store) Check only if Apple or Google products are available.
 - e. APP_OTHER Provide text description of all other types of mobile products available. Products should be separated by commas.
- 8) LINK [MAIN_PAGE = 2, OTHER_PAGES = 1, NO = BLANK; AUTODETECT] Is there a direct link to at least one mobile product from the main page (“2”) or other pages (“1”) of the newspaper’s website? Leave blank when there are no links or if it is not applicable. Text blocks, menu items, and images might serve as links. If there’s no link from the mobile version of the site, the desktop version should be explored. Use “AUTODETECT” if the website correctly redirects mobile user to a mobile version.

A link to “a landing page” that describes all mobile products a newspaper offers (example: <http://www.newsobserver.com/mobile/>) counts as a direct link.

- 9) NOTES – Additional notes and details.

- 10) CHAIN (OWNED_BY_CHAIN = 1, INDEPENDENT = 0) Is the newspaper owned by a company that owns at least one more media company in North Carolina? If cannot be established or no information available, consider the newspaper independent ("0").
- 11) OWNER – Name of the parent company, or the name of the publishing business.
- 12) CIRCULATION – The most current data about the newspaper's circulation.

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- ¹²⁷ This statement means that most newspaper executives were falling between "agree" and "strongly agree" on the agreement scale, when asked to agree if financial difficulties existed (see Appendix IV for the full question list). In analyzing the data one should consider standard deviation (SD): it represents how far the answers spread from the mean value. The detailed data tables with SD values can be found in Appendix III.
- ¹²⁸ Pew Research Center's Internet & American Life Project (2013, December 27). Mobile Technology Fact Sheet. Retrieved March 20, 2014 from <http://www.pewinternet.org/fact-sheets/mobile-technology-fact-sheet/>
- ¹²⁹ Percentages may not add up to 100% because of rounding.
- ¹³⁰ Including the 10% who answered "Don't know."
- ¹³¹ Including the 24% who answered "Don't know."
- ¹³² Including the 24% who answered "Don't know."
- ¹³³ See Appendix I for more details on the study design.
- ¹³⁴ BI Intelligence. (2012, August 1). And The Winner Of The Apps vs. Browsers War Is... Business Insider. Retrieved March 21, 2014, from <http://www.businessinsider.com/mobile-usage-and-the-winner-of-the-apps-vs-browsers-war-is-2012-7>

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- ¹⁴¹ DeGusta, M. (2012, May 9). Are Smart Phones Spreading Faster than Any Technology in Human History? MIT Technology Review. Retrieved April 18, 2014, from <http://www.technologyreview.com/news/427787/are-smart-phones-spreading-faster-than-any-technology-in-human-history/>
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- ¹⁴³ Breaking News Is the Top Reason for Mobile News App Usage. (2014, March 31). eMarketer. Retrieved April 12, 2014, from <http://www.emarketer.com/Article/Breaking-News-Top-Reason-Mobile-News-App-Usage/1010719>
- ¹⁴⁴ It is also possible that the publishers are just less willing to charge for subscription on mobile apps, preferring different monetization models.
- ¹⁴⁵ Breaking News Is the Top Reason for Mobile News App Usage. (2014, March 31). eMarketer. Retrieved April 12, 2014, from <http://www.emarketer.com/Article/Breaking-News-Top-Reason-Mobile-News-App-Usage/1010719>
- ¹⁴⁶ See Appendix I for additional information about the content analysis part of the study
- ¹⁴⁷ "A media chain," here and throughout the report, is a company that owns at least two newspapers in North Carolina.
- ¹⁴⁸ Total sample was 81, but six media organizations were represented by two executives. See Appendix II for details.

¹⁴⁹ Including the 10% who answered “Don’t know”

¹⁵⁰ Including the 24% who answered “Don’t know”

¹⁵¹ Travaline, P. (2013, April 18). Survival of the Newspaper Industry: What Mark Jurkowitz Has to Say Skyword. Retrieved December 24, 2013, from <http://www.skyword.com/blog/survival-of-the-newspaper-industry-what-mark-jurkowitz-has-to-say/>

¹⁵² Abernathy, P. M. (2014). Saving Community Journalism: The Path to Profitability. Chapel Hill: The University of North Carolina Press. (page 174)

¹⁵³ Including the 24% who answered “Don’t know”

¹⁵⁴ There is a possibility that results were influenced by examples used in the question: “When making decisions about your company’s strategy in mobile, what are the main factors you consider? (e.g. ‘ROI’, ‘costs’, ‘additional workload for staffers’...)”

¹⁵⁵ BI Intelligence. (2012, August 1). And The Winner Of The Apps vs. Browsers War Is... Business Insider. Retrieved March 21, 2014, from <http://www.businessinsider.com/mobile-usage-and-the-winner-of-the-apps-vs-browsers-war-is-2012-7>

¹⁵⁶ Nielsen (2012, April 12). State of the Media: The Social Media Report 2012. Nielsen. Retrieved March 21, 2014, from <http://www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2012-Reports/The-Social-Media-Report-2012.pdf>

¹⁵⁷ AdAge. (2013, December 29). 2014 Marketing Fact Pack. AdAge. Retrieved from <http://adage.com/trend-reports/report.php?id=88> (page 20)

¹⁵⁸ eMarketer. (2014, March 19). Driven by Facebook and Google, Mobile Ad Market Soars in 2013. Retrieved March 21, 2014, from <http://www.emarketer.com/Article/Driven-by-Facebook-Google-Mobile-Ad-Market-Soars-10537-2013/1010690>

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¹⁶⁰ http://gaia.adage.com/images/bin/pdf/MFPweb_spreadsv2.pdf (page 16)

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¹⁷⁴ Check out <https://www.elance.com/r/contractors/cat-it-programming> or <https://www.odesk.com/o/profiles/browse/c/software-development/sc/mobile-apps/> or <https://www.freelancer.com/freelancers/skills/all/>

¹⁷⁵ Here's a neat summary of the most popular tools: <http://www.zdnet.com/blog/small-business-matters/14-diy-mobile-app-development-resources-for-small-businesses/2288> . Or, just in case the link gets broken, google any of the following names: Application Craft, Appmakr, AppNotch, App Press, AppsBuilder, Attendify, Bizness Apps, BuildAnApp, Huzzah Media, iBuildApp, Infinite Monkeys, JoeMobi, Magmito, Mippin App Factory, MobBase, Mobile Roadie, MobileAppLoader, Orbose, Mobile App Maker, ViziApps, Windows Phone App Studio or Wix.

¹⁷⁶ Get WordPress software for you website here <http://wordpress.org/>, or you may also quickly deploy a WordPress-based site for a fee on <http://wordpress.com/>.

¹⁷⁷ Explore available templates here: <https://wordpress.org/themes/responsive>, a roundup of mobile plugins <http://www.wpkube.com/wordpress-plugins-to-make-your-site-mobile-responsive/> and a brief tutorial <http://www.wpuniversity.com/wordpress-tips/quickly-and-easily-make-your-wordpress-site-mobile-friendly/>.

¹⁷⁸ See presentation: <http://www.biakelsey.com/Events/Speaking-Engagements/jed%20Williams%20Inland%20Press%20Group%20Executives%20Conference%208-1-13.pdf>

¹⁷⁹ Ibid (Slide 17)

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- ¹⁹³ Qualtrics-based.
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