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ABSTRACT

A study analyzed the attitudes of newspaper subscribers and nonsubscribers to determine whether the two groups were truly distinct, homogenous segments of the public or whether there were "atypical" subscribers and nonsubscribers. Data were gathered through telephone interviews with more than 1,000 adults in the southeastern United States. Based on their responses to a number of questions related to newspaper use, these adults were segmented into four groups: (1) hard-core newspaper subscribers, who indicated that they would continue subscribing to a given newspaper; (2) marginal subscribers, who said they might stop subscribing; (3) potential subscribers, who said they might begin subscribing; and (4) hard core nonsubscribers, who indicated that they would not begin subscribing. Analysis of data generated in the study revealed that newspaper subscribers and nonsubscribers are not distinct, homogenous groups. When segmented to reflect strength of commitment to continue subscribing, the respondents indicated that there are atypical subscribers and nonsubscribers who share many of the same demographic and news content interest characteristics. The findings suggest that two segments of the reading audience are of critical importance to newspapers--the marginal and the potential subscriber. By identifying the members of these segments, newspapers can focus their promotional and marketing efforts on the people most likely to affect circulation trends. (FL)

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NEWSPAPER DIVISION

NEWSPAPER SUBSCRIBERS VS. NON-SUBSCRIBERS:  
FURTHER SEGMENTATION OFFERS NEW INSIGHTS

By

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NEWSPAPER SUBSCRIBERS VS. NON-SUBSCRIBERS:  
FURTHER SEGMENTATION OFFERS NEW INSIGHTS

For more than 25 years, communication researchers have been studying newspaper readers vs. non-readers and subscribers vs. non-subscribers in an attempt to better understand the phenomena of non-reading/non-subscribing behavior. Almost all of the previous work in this area has been based on studying readers/subscribers and non-readers/non-subscribers as distinct segments of the audience.

In 1958, the Surveys Committee of the National Association of Science Writers presented evidence that age, sex, urbanism, education, and income were related to newspaper reading vs. non-reading. (1) Westley and Severin found support in a 1961-62 survey in Wisconsin that:

The non-newspaper reader proves to be low on the scale of occupations, low in education, low in income and likely to regard himself as "working class" rather than "middle class." He is much more likely to be a farmer than a city dweller and, among the non-farm population, somewhat more likely to be a resident of a place under 10,000 population than a larger city. The non-reader is no more likely to be of one sex or the other, but tends

to be either in his 20's or in his 70's or older. He tends to have lived only a few years at his present address. (2)

Similarly, Greenberg and Kumata found the highest multiple correlation of any media use patterns came with newspaper reading, and that only four demographic variables -- sex, age, education, and income -- accounted for 27 percent of the variability in newspaper readership scores. (3)

More recently, Rarick speculated that household characteristics rather than those of individuals in the household are better predictors of subscribers vs. non-subscribers to daily newspapers. (4) Again looking at subscribers and non-subscribers as distinct segments, Rarick concluded that the best predictors of newspaper subscribing are income, length of residence, and home ownership.

Several other studies of readers vs. non-readers of newspapers have focused on the two segments, and have found similar patterns which tend to distinguish readers from non-readers. (5) However, Poindexter in 1979 proposed a new approach to the study of newspaper non-readers, based on her findings that non-readers are not a homogenous segment, but that many "non-readers" are atypical in demographic characteristics. That is, they tend to be more like readers than other non-readers on measures of sex, income, or education. She concluded:

Determining why this contradiction exists underscores the significance of this analysis of the daily newspaper non-reader community, and it also questions the validity of writing

off the non-reader group as a lost cause as previous studies have suggested. (6)

### The Problem

This study attempts to analyze newspaper subscribers and non-subscribers in order to determine whether the two groups are distinct, homogenous segments or whether there are "atypical" subscribers and non-subscribers. The answer to this question has obvious implications for newspaper circulation marketing and promotion since newspaper household penetration levels continue to decline in this country.

### Methods

The data for this analysis were obtained in a comprehensive marketing survey for a daily newspaper in the Southeastern United States. A randomly selected sample of 1,102 adults were interviewed by centralized WATS telephone interviewers, with continuous supervision and monitoring.

All interviewing was completed during August 1982. The interviews averaged approximately 20 minutes and included standard newspaper readership questions, demographics, reading interests, and shopping patterns.

In addition, the following questions were asked to provide a base for segmenting the broad subscriber/non-subscriber groups in the market:

(SUBSCRIBERS) "How likely are you to continue subscribing to the (NAME OF PAPER) -- are you almost certain to continue subscribing, will you probably continue, are the chances 50-50, will you probably not continue, or are you almost certain that you will not continue subscribing to the (NAME OF PAPER)?"

(NON-SUBSCRIBERS) "How likely would you, say you are to start subscribing to the (NAME OF PAPER) in the next few months -- that is, receiving home delivery....are you almost certain that you will start subscribing, will you probably start, are the chances 50-50, will you probably not start subscribing, or are you almost certain that you will not start subscribing to the (NAME OF PAPER)?"

Results are summarized in Table 1.

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TABLE 1 ABOUT HERE

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Those subscribers who said they were almost certain to continue subscribing were classified as "hard-core subscribers" and all others were classified as "marginal subscribers." Non-subscribers who said the chances were 50-50 or better that they would start subscribing were classified as "potential subscribers" and all others were classified as "hard-core non-subscribers." This resulted in the following cell sizes for the analysis:

	<u>Respondents</u>
<u>Total Subscribers</u>	<u>370</u>
Hard-core Subscribers	228
Marginal Subscribers	142
<u>Total Non-subscribers</u>	<u>732</u>
Potential Subscribers	92
Hard-core Non-subscribers	640

The analysis included comparisons of demographics, newspaper content interests, and reasons for starting/stopping a newspaper subscription between total subscribers vs. total non-subscribers and then among the four segments of hard-core subscribers, marginal subscribers, potential subscribers, and hard-core non-subscribers.

Demographics

Results

As was expected, there were clear distinctions between the segments of total subscribers vs. total non-subscribers. Consistent with previous studies, subscribers tended to be older, higher income, married home owners who had lived in the area longer. (See Table 2)

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TABLE 2 ABOUT HERE

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The only differences between subscribers and non-subscribers which were statistically significant were age and length of residence in the area, however. The others, although in the expected direction, were not statistically significant.

A very different pattern emerges, though, when the subscriber and non-subscriber segments are further segmented into the four classifications. The hard-core subscribers and the hard-core non-subscribers tend to be more similar, and the marginal subscribers tend to be more like the potential subscribers on demographics. For example, the two hard-core segments tend to be older, higher income, home owners, and long-time residents of the area whereas the marginal subscribers and the potential subscribers tend to be younger, lower income, single, and newer residents in the area. (See Table 3)

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TABLE 3 ABOUT HERE

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As shown in Table 3, there is no statistically significant difference on age between hard-core subscribers and marginal subscribers. However, the differences are statistically significant between potential subscribers and hard-core non-subscribers, as well as between hard-core subscribers and hard-core non-subscribers and between marginal subscribers and potential subscribers. This suggests that the potential subscribers are a very different group and not similar to hard-core subscribers.

The income comparisons are even more interesting. While there was not a statistically significant difference between total subscribers vs. total non-subscribers, the differences become statistically significant when the four circulation segments are analyzed, as shown in Table 3. However, there is not a statistically significant difference between hard-core subscribers and hard-core non-subscribers nor between marginal subscribers and potential subscribers, while there is a statistically significant difference between hard-core subscribers and marginal subscribers, as well as between potential subscribers and hard-core non-subscribers. This indicates that on the measure of income, hard-core subscribers and hard-core non-subscribers are similar, while the marginal subscribers are more like the potential subscribers.

The same situation exists on type of residence, which was not statistically significant between total subscribers vs. total non-subscribers. When the four circulation segments are analyzed, the difference is statistically significant. And, as with income, the statistically significant differences



are between hard-core subscribers vs. marginal subscribers, and potential subscribers vs. hard-core non-subscribers, with no statistically significant differences between hard-core subscribers vs. hard-core non-subscribers or between marginal subscribers vs. potential subscribers.

Length of time in the area is the only demographic characteristic which does distinguish between the two subscriber segments vs. the two non-subscriber segments. There are no statistically significant differences between hard-core subscribers and marginal subscribers or between potential subscribers and hard-core non-subscribers. However, hard-core subscribers are significantly different from hard-core non-subscribers and marginal subscribers are significantly different from potential subscribers.

There were no statistically significant differences among the various circulation segments on marital status.

Clearly, then, on the basis of demographics subscribers and non-subscribers are not distinct, homogenous segments of the audience. On some characteristics, marginal subscribers are more like potential subscribers and hard-core subscribers are more like hard-core non-subscribers.

#### Newspaper Content Interests

Consistent with previous studies (7), non-subscribers are generally less interested in all types of newspaper content than are subscribers. (See Figure 1) The largest differences are on locally oriented content. (8)

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FIGURE 1 ABOUT HERE

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However, as with demographics, when the two broad circulation segments are analyzed in more detail with four classifications, some very different patterns emerge in newspaper content interests. (See Figure 2)

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FIGURE 2 ABOUT HERE

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Potential subscribers and marginal subscribers, for example, have about the same levels of interest in such content as tips on how to save money, personal health and medicine, things to do and places to go in the area, do-it-yourself articles, city government news, county government news, and foods and recipes -- mostly "soft" news content. Hard-core non-subscribers are less interested than any other segments in all but four types of content -- local news, national and world news, local sports news, and national sports news -- where they express slightly more interest than the potential subscribers.

Thus, as with demographics, valuable insights can be gained into subscribing vs. non-subscribing behavior by analyzing the four circulation segments than just the two broad segments.

#### Reasons for Starting/Stopping

Finally, current subscribers were asked for the main reasons they might stop subscribing to the newspaper, and non-subscribers were asked for the main reasons they do not subscribe to the newspaper. When analyzed as two broad segments, subscribers are much more likely to mention delivery service and billing procedures as reasons they would stop subscribing, whereas non-subscribers are much more likely to mention price and content.

(See Table 4)

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TABLE 4 ABOUT HERE

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However, as with the previous analyses, when the two broad circulation segments are divided into the four segments, different patterns emerge. (See Table 5). Hard-core subscribers and potential subscribers are

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TABLE 5 ABOUT HERE

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more concerned about delivery service and billing procedures, whereas marginal subscribers and hard-core non-subscribers are more concerned about price and content.

In other words, hard-core subscribers appear to be well satisfied with the newspaper and will continue to subscribe so long as they do not encounter serious delivery service or billing procedure problems, and potential subscribers share a concern about receiving good delivery service without billing procedure problems. In contrast, the marginal subscribers seem to be saying that they will stop subscribing if they perceive the newspaper as no longer worth the cost of subscribing, with substantially less concern about delivery service and billing procedures, and the hard-core non-subscribers -- with their lower levels of interest in newspaper content -- apparently do not perceive the newspaper in its current form as worth the cost.

On reasons for stopping or starting a subscription to the newspaper, then, all four circulation segments are significantly different. In other words, they have very different concerns that relate to their decision to stop or start a subscription.

### Discussion

This study strongly suggests that daily newspaper subscribers and non-subscribers are not distinct, homogenous segments. When further segmented to reflect strength of commitment to continue subscribing or to begin subscribing, four circulation segments indicate that there are "atypical" subscribers and non-subscribers who share many of the same demographic and news content interest characteristics. These characteristics distinguish the "swing" segments from the broader segments of subscribers vs. non-subscribers.

The decision to subscribe or not subscribe to a daily newspaper involves at least a sub-conscious cost-benefit analysis. There are costs involved in subscribing to and reading a daily newspaper -- the price of the subscription, the time and effort required to read it, etc. There also are benefits to be derived from subscribing to and reading a daily newspaper -- being informed, saving money through advertisements and how-to-do-it articles, planning leisure activities, the enjoyment of reading, deriving a sense of participating in the community, etc.

If a person feels that the benefits outweigh the costs of subscribing to a daily newspaper, that person probably will continue or begin to subscribe. If the perceived costs outweigh the perceived benefits, a person probably will stop or not begin subscribing.

In terms of the analytic cells in this study, hard-core subscribers apparently feel that the benefits of subscribing to a daily

far outweigh the costs. These people probably will continue to subscribe to the newspaper unless they encounter serious problems with delivery service and/or billing procedures.

The hard-core non-subscribers, with their generally lower levels of interest in all types of newspaper content, seem to perceive the value of a daily newspaper as not worth the costs involved in subscribing to and reading the newspaper. These individuals would appear to offer little potential for the newspaper.

Between the two extreme segments, among the marginal subscribers and the potential subscribers, we can assume that the perceived costs and the perceived benefits of subscribing to and reading a daily newspaper are about equal, and that on a teeter-totter of costs-benefits, these people would be at or near the fulcrum. These two segments, then, appear to offer the greatest potential for maintaining or increasing newspaper circulation.

The ultimate objective of a newspaper's circulation marketing strategic planning must be to maintain the current base of subscribers while adding new subscribers to the franchise. Otherwise, there will be continual "churn" in the circulation, with new subscribers only replacing old subscribers who stop receiving home delivery of the newspaper.

This study suggests that two segments of the audience are of critical importance to the newspaper -- the marginal subscribers, who might cancel, and the potential subscribers, who might begin subscribing. In terms of marketing strategies, the hard-core subscribers appear to be "safe" for the newspaper, requiring attention primarily as it relates to satisfactory delivery and billing procedures. Extensive promotional efforts directed

toward the hard-core non-subscribers will not be productive. Before most of these people could be "sold" on subscribing to a specific newspaper, they first would have to be "sold" on the value of reading a newspaper in general.

Thus, by identifying the key segments of marginal subscribers and potential subscribers, a newspaper could focus its promotional and marketing efforts on the people most likely to affect both short-run and long-run circulation trends. This study indicates that the marginal subscribers may be more similar to potential subscribers than to hard-core subscribers in many characteristics. This suggests that in this market, at least, many of the same strategies and targets for maintaining marginal subscribers may be similar to the best strategies for attracting potential subscribers.

#### Summary

This study of 1,102 randomly selected adults in a Southeastern United States market indicates that daily newspaper subscribers and non-subscribers are not distinct, homogenous segments of the audience. Further analysis of the data reflects that "atypical" subscribers and non-subscribers may be more similar to each other than to the broader subscriber/non-subscriber segments of which they are a part.

Another study currently underway in a major Southwestern United States newspaper market includes the same measures as the ones used in this study. The results will be compared to determine if the findings might apply more broadly than the single Southeastern market.

Table 1. Subscribing Intentions

	Total Subscribers (N=370)	Total Non-Subscribers (N=732)
Likelihood of Continuing/Starting:		
Almost certain to	61.6%	1.2%
Probably will	24.9%	2.9%
Chances 50-50	9.5%	8.5%
Probably will not	0.3%	28.7%
Almost certain not to	1.4%	53.6%
Not sure/Refused	2.4%	5.2%

Table 2. Demographics of Total Subscribers vs. Total Non-Subscribers

	Total Subscribers	Total Non-Subscribers
Age:		
18 to 34	28.3%	<u>40.6%</u>
35 to 49	29.9%	25.9%
50 and older	<u>41.7%</u>	34.1%
$\chi^2 = 15.54, 2 \text{ d.f.}, p < 0.01$		
Income:		
Under \$20,000	57.3%	60.4%
\$20,000 and over	42.7%	39.6%
$\chi^2 = 0.96, \text{ N.S.}$		
Residence:		
Own home	84.9%	82.9%
Rent, other	15.1%	17.1%
$\chi^2 = 0.91, \text{ N.S.}$		
Marital Status:		
Married	71.2%	70.3%
Not married	28.8%	29.7%
$\chi^2 = 0.17, \text{ N.S.}$		
Time in Area:		
3 years or less	6.0%	<u>13.2%</u>
4 to 10 years	14.6%	<u>18.5%</u>
More than 10 years	<u>79.4%</u>	68.3%
$\chi^2 = 18.56, 2 \text{ d.f.}, p < 0.01$		



Table 3. Demographics of Hard-Core Subscribers vs. Marginal Subscribers vs. Potential Subscribers vs. Hard-Core Non-Subscribers

Age:	Hard-Core Subscribers	Marginal Subscribers	Potential Subscribers	Hard-Core Non-Subscribers
18 to 34	27.8%	29.3%	61.2%	37.1%
35 to 49	29.1%	31.3%	15.5%	27.0%
50 and older	43.2%	39.5%	23.3%	35.9%

$\chi^2 = 37.73, 6 \text{ d.f.}, p < 0.01$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 0.56, 2 d.f., N.S.

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 7.51, 2 d.f.,  $p < 0.05$

$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 24.41, 2 d.f.,  $p < 0.01$

$\chi^2$  Potential Subscribers vs. Hard-core Non-Subscribers = 20.58, 2 d.f.,  $p < 0.01$

Income:

Under \$20,000	54.4%	61.9%	69.1%	56.6%
\$20,000 and over	45.6%	38.1%	30.9%	43.4%

$\chi^2 = 12.33, 3 \text{ d.f.}, p < 0.01$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 3.00, 1 d.f.,  $p < 0.10$

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 0.39, N.S.

$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 1.26, N.S.

$\chi^2$  Potential Subscribers vs. Hard-core Non-Subscribers = 5.90, 1 d.f.,  $p < 0.05$

Residence:

Own home	87.5%	81.0%	73.1%	84.7%
Rent, other	12.5%	19.0%	26.9%	15.3%

$\chi^2 = 11.05, 3 \text{ d.f.}, p < 0.05$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 4.08, 1 d.f.,  $p < 0.05$

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 1.29, N.S.

$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 2.26, N.S.

$\chi^2$  Potential Subscribers vs. Hard-Core Non-Subscribers = 7.47, 1 d.f.,  $p < 0.01$

Table 3. Demographics, continued

	Hard-Core Subscribers	Marginal Subscribers	Potential Subscribers	Hard-Core Non- Subscribers
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Marital Status:

Married	72.8%	68.6%	63.9%	71.4%
Not married	27.2%	31.4%	36.1%	28.6%

$\chi^2 = 3.20, 3 \text{ d.f.}, \text{N.S.}$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 1.22, N.S.

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 0.20, N.S.

$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 0.32, N.S.

$\chi^2$  Potential Subscribers vs. Hard-core Non-Subscribers = 1.88, N.S.

Time in Area:

3 years or less	4.7%	7.9%	18.5%	12.3%
4 to 10 years	13.8%	15.8%	15.9%	18.8%
More than 10 years	81.5%	76.3%	65.4%	68.8%

$\chi^2 = 22.7, 6 \text{ d.f.}, p < 0.01$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 3.10, N.S.

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 16.44, 2 d.f.,  $p < 0.01$

$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 5.73, 2 d.f.,  $p < 0.10$

$\chi^2$  Potential Subscribers vs. Hard-core Non-Subscribers = 2.56, N.S.

Table 4. Reasons for Stopping or Starting a Subscription

	Total Subscribers	Total Non-Subscribers
Price	41.4%	55.1%
Content	25.2%	42.8%
Delivery service	31.7%	33.4%
Billing procedures	25.9%	18.9%

$\chi^2 = 25.61, 3 \text{ d.f.}, p < 0.01$

Table 4. Reasons for Stopping or Starting by Circulation Segments

	Hard-Core Subscribers	Marginal Subscribers	Potential Subscribers	Hard-Core Non- Subscribers
Price	42.0%	<u>57.3%</u>	41.4%	<u>55.1%</u>
Content	21.8%	<u>30.0%</u>	18.0%	<u>49.3%</u>
Delivery service	<u>42.9%</u>	15.8%	<del>48.0%</del>	31.0%
Billing procedures	<u>31.8%</u>	17.5%	<u>28.0%</u>	17.3%

$\chi^2 = 25.61, 9 \text{ d.f.}, p < 0.01$

$\chi^2$  Hard-core Subscribers vs. Marginal Subscribers = 32.90, 3 d.f.,  $p < 0.01$

$\chi^2$  Hard-core Subscribers vs. Hard-core Non-Subscribers = 61.75, 3 d.f.,  $p < 0.01$

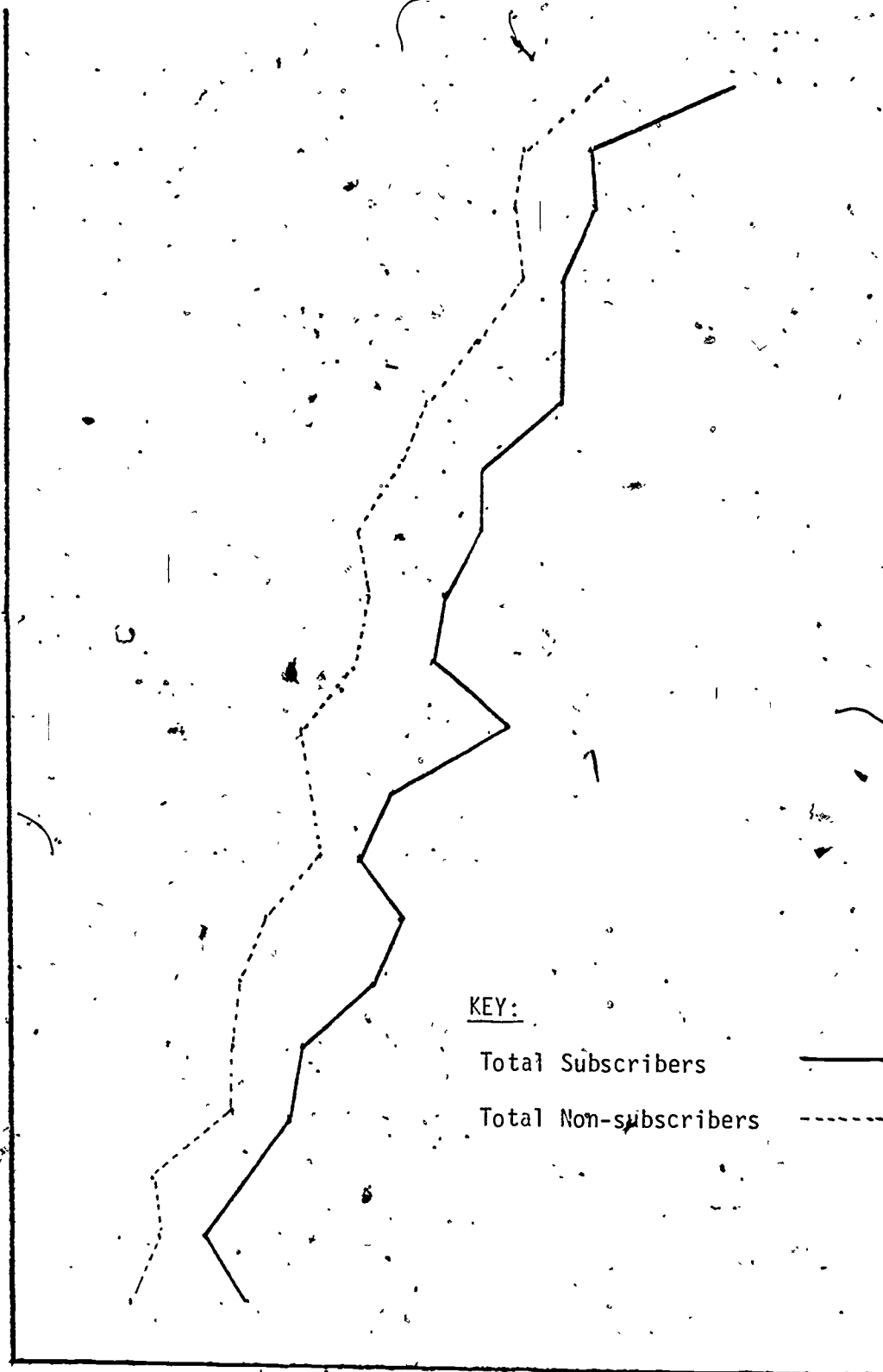
$\chi^2$  Marginal Subscribers vs. Potential Subscribers = 30.24, 3 d.f.,  $p < 0.01$

$\chi^2$  Potential Subscribers vs. Hard-core Non-Subscribers = 50.99, 3 d.f.,  $p < 0.01$

Figure 1. News Interests, Total Subscribers vs. Total Non-Subscribers

CONTENT:

- Local News
- Nat'l Economy
- Tips on How to Save Money
- National/World News
- State News
- Area Crime News
- Personal Health & Medicine
- Local Business
- Things to do
- Do-it-yourself
- Obituaries
- Local Govt.
- County Govt.
- Editorials
- Local Sports
- National Sports
- Foods/Recipes
- Society News
- Concerts
- Comics

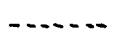


KEY:

Total Subscribers



Total Non-subscribers



3

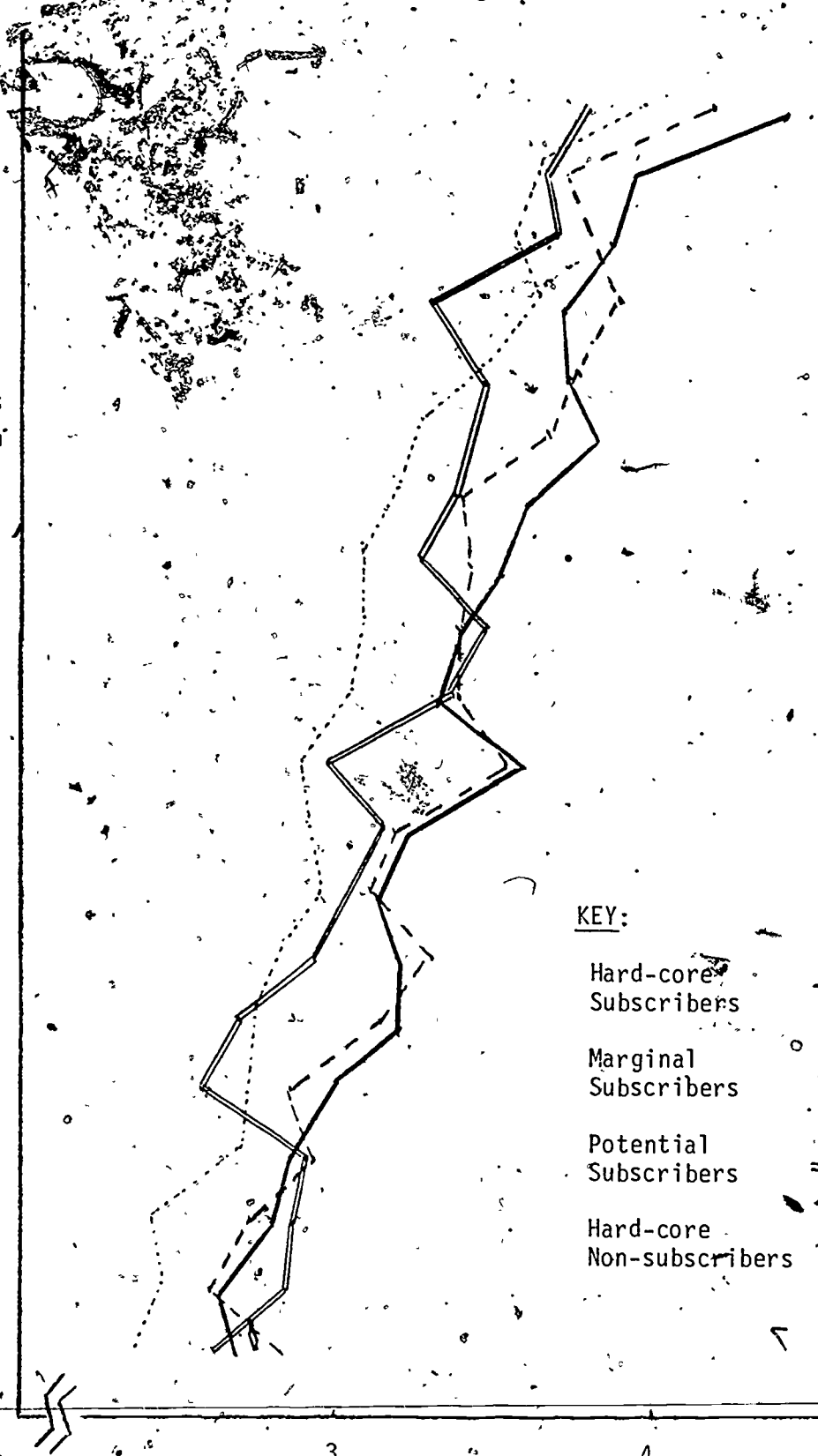
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MEAN INTEREST SCORES

Figure 2. News Interests by Circulation Segments

CONTENT:

- Local News
- Nat'l Economy
- Tips on How to Save Money
- National/World News
- State News
- Area Crime News
- Personal Health & Medicine
- Local Business
- Things to do
- Do-it-yourself
- Obituaries
- City Govt.
- County Govt.
- Editorials
- Local Sports
- National Sports
- Foods/Recipes
- Society News
- Concerts
- Comics



KEY:

- Hard-core Subscribers (solid line)
- Marginal Subscribers (dashed line)
- Potential Subscribers (double line)
- Hard-core Non-subscribers (dotted line)

MEAN-INTEREST SCORES

Footnotes

1. The Public Impact of Science in the Media. Ann Arbor: Survey Research Center, University of Michigan, 1958.
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4. Galen R. Rarick, "Differences Between Daily Newspaper Subscribers and Nonsubscribers," Journalism Quarterly, Vol. 50: 265-70, Summer 1973.
5. For example, Jeanne Penrose, David H. Weaver, Richard Cole and Donald Lewis Shaw, "The Newspaper Non-reader 10 Years Later: A Partial Replication of Westley-Severin," Journalism Quarterly, Vol. 51: 631-38, Winter 1974; John Clinton Schewitzer, "The Newspaper and Its Community: An Analysis of Non-readership," unpublished Dissertation, University of North Carolina at Chapel Hill, 1974; Maxwell E. McCombs, L. E. Mullins and David H. Weaver, "Why People Subscribe and Cancel: A 'Start-Stop' Survey of Three Daily Newspapers," American Newspaper Publishers Association News Research Bulletin No. 3, April 5, 1974, p. 12.
6. Paula Poindexter, "Daily Newspaper Non-Readers: Why They Don't Read," Journalism Quarterly, Vol. 56: 764-70, Winter 1979.
7. More than 25 proprietary surveys conducted for newspaper clients between 1977 and 1982 by Gerald L. Gotta.
8. This also is consistent with many proprietary surveys.