

FREE NEWSPAPER READERSHIP

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Abstract

Twelve years after the introduction of the first free commuter newspaper in Sweden, circulation of free newspapers has risen to 40 million daily copies. Readership of free newspapers is more complex and in many cases harder to pin down. In general it is different from readership of paid newspapers. The first difference concerns the demographics of the readers: free papers target the affluent 18 to 34 group and in many cases try to achieve that by choosing particular ways of distribution, and also by concentrating on specific content. Age, indeed seems to be significantly lower in most cases although the average readers does not seem to be particularly wealthy. The second distinct feature is the amount of unique readers of free newspaper. Results on the few available cases indicate that around half of the readers only read papers although also lower levels have been reported. The third issue concerns readers per copy. The traditional free commuter daily can reach to a rather high number of readers per copy; but with many markets reaching free newspaper saturation this number seems to be dropping, whereas free door-to-door distributed free papers and afternoon papers have a lower readership per copy. In this paper we will present information on these three issues from a dozen markets, using audited readership data.

Free Newspaper Readership

The World Association of Newspapers (2007) reported on the year 2006 that daily circulation of newspapers increased with 4.61 percent (25 million copies) compared to 2005. Over a five-year period the increase was almost 15%. This news must have come as a surprise to many newspaper researchers. It was hardly in line with articles like *Who killed the Newspaper* (The Economist, 2006), books like *The Vanishing Newspaper* (Meyer, 2004) and numerous news item about falling newspaper circulation in almost every market in Europe and Northern America. A more detailed inspection of the WAN data revealed that there were two main sources for the remarkable increase. The first was a more than 10 million rise in paid circulation in India, a market without official audited circulation data. The second is an increase of again more than 10 million in circulation of free dailies.

The circulation of free dailies has grown from 200,000 in 1995 to more than 40 million at halfway 2007 (*Newspaperinnovation*, 2007). In Europe where almost 70 percent of the total circulation of 40 million is distributed, market share of free dailies has risen to more than 20 percent, in three countries (Iceland, Spain and Denmark) more free than paid papers are distributed while in 14 countries the market share is above 25%. In ten countries the paper with the highest circulation is a free daily. Outside Europe free papers had a market share in 2006 of more than 25 percent in Botswana, Hong Kong, Singapore, the Dominican Republic, Chile, and Canada. The US and Korea have a lower market share of free papers but in both countries the combined circulation is more than three million.

Whereas the circulation of free dailies is documented quite well, less is known about readership. Common knowledge about readership of paid dailies – if there is such a thing – can hardly be applied to free dailies because these are very different from paid dailies. First of all they are almost exclusively distributed in metropolitan areas through public transport (either in trains, buses, trams and subways or in stations) and in public places (shopping malls, restaurants, retail stores, bakeries, parking garages, filling stations, schools, universities, street corners) by hand or through boxes, although some titles also rely on home delivery. Almost all titles are only published on weekdays; few papers publish more than five days a week. Free dailies in general have a smaller news hole, the average page count is around 30 pages (tabloid). Most free dailies specifically target young urban readers from higher income groups.

In this paper we will first map the advance of free newspapers and assess the general situation of newspapers markets after this development. After that we will move to three related questions that zoom in on the special position of free newspapers and the main differences between readership of paid and free newspapers.

The advance of free dailies newspapers

The first free modern commuter daily, Metro, was launched in Stockholm in February 1995¹. Publisher Metro International introduced the concept in Czech Republic, Hungary, Finland and the Netherlands in the nineties of the last century. During the introduction years other publishers also launched free dailies, either as a defence measure against Metro or other entrepreneurs, or as a possibility to get access to new readers. In 1999 the free commuter daily was introduced on the American continent, in 2000 Asia followed. After five years, in 2000, almost 60 titles were introduced in 24 countries. Total circulation was just below eight million. In 2000 and 2001 circulation increases rapidly but slowed down after the post 9/11 recession. In 2004, 2005 and 2006 growth in circulation picked up again. The link with economic developments is quite obvious; launches follow the economy. As the number of titles increases much faster than the amount of countries with free dailies, also competition between free dailies increases. Monopolistic markets are in fact quite rare, while markets with three to four different titles are by no ways exceptional. Korean capital Seoul even has eight different titles (figure 1).

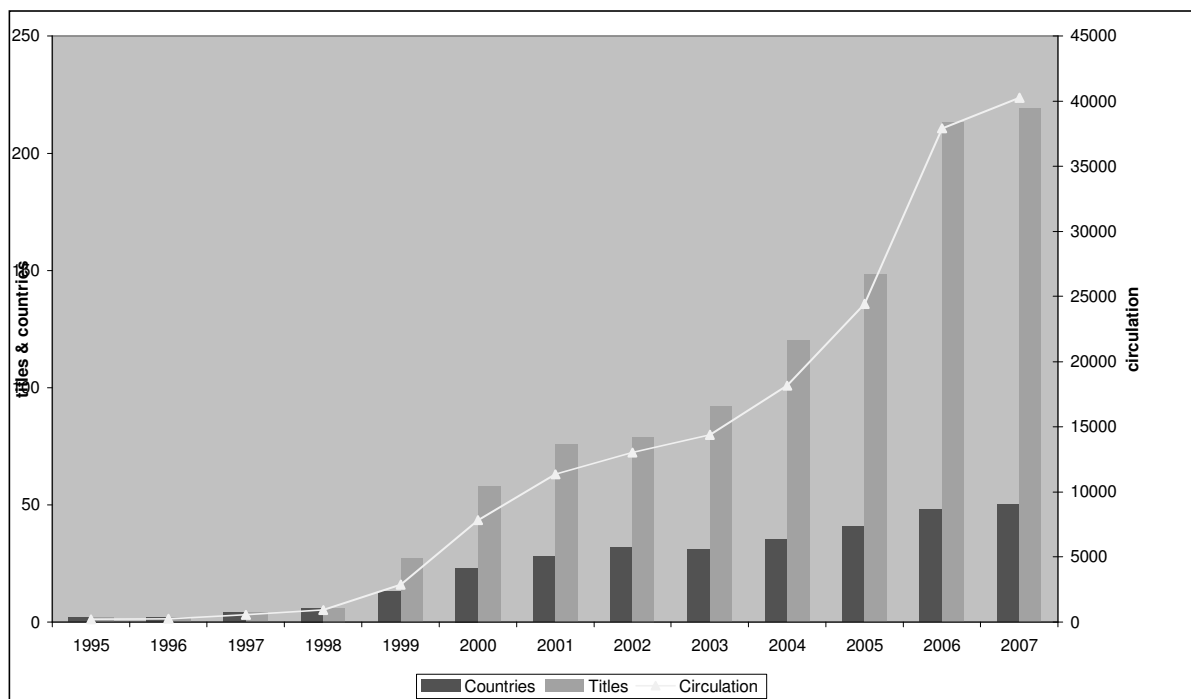


Figure 1: number countries with free dailies and number of titles (left axis) and circulation (right axis) 1995 (February) – 2007 (September).

In Europe where the bulk of the circulation of free dailies is distributed, the average market share is 23% (for the 21 markets² with full data since 1995), not only because of increasing circulation of free papers but also because paid papers have seen their circulation drop with 14% since 1995 (figure 2).

¹ Earlier local models were developed in Spain (1992), the US (from 1945 on), Brazil (1974), Russia (1992) and Australia (1906).

² For 21 European countries with (almost) complete data for the whole period, this includes all major markets. For Luxembourg one missing year was estimated, for Greece the 2005 data were also used for 2006 because of inconsistent measurements. Not included are the former Yugoslavian and Russian Federation countries, Albania, Turkey and Slovakia.

Theories on readership

Because of other distribution methods, different target audiences and different content readership of free dailies differs from readership of paid papers. Picard (2000) predicted that free dailies might be of interest mostly to occasional readers of paid papers so substitution would be minimal while he also did not expect too many non-readers to be converted to reading a newspaper.

The non-substitution hypotheses seems to hold in most cases. Bakker (2004) found only a minimal impact in the Netherlands when he examined circulation data of free papers and the most likely competitors. In Europe only Iceland is a clear case of substitution while in Denmark some substitutions seems to take place (Bakker, 2007). Both countries, however, are quite exceptional because free dailies are also home delivered. In most European countries paid circulation went down already before the introduction of free dailies. When free papers were introduced, there hardly was any relation between the rise in free and the decline in paid circulation. Also, in Germany, Luxemburg and Norway, countries without free dailies, circulation of paid newspapers decreased; in the case of Germany even more than the European average decline.

With substitution unlikely or minimal, most readers of free dailies must be either new readers or reading both paid and free dailies (Bakker, 2002). On double versus unique readership, research results differ. Mahoney and Collins (2005) researched four major markets in the US and found high duplication of paid and free readership. A detailed analysis of readership patterns in the city of Gothenburg (Sweden), revealed that the increase in newspaper readership – and unique readership – after the introduction of free dailies, was most of all visible in neighborhoods where lower social classes, meaning low readership of paid papers, dominated (Wadbring, 2007).

Research questions: demographics, unique readership, readers per copy

Knowledge on readership of free dailies is still not well developed; this is even more problematic because of the rising importance of this new form of newspaper. First of all the demographic of the ‘typical’ reader of free newspapers will be analyzed and compared to the profile of the readers of paid papers. Publishers of free dailies usually claim they target the ‘affluent young ABC1 urbanite’ but these claims are in many cases not backed up with too much data. Mahoney and Collins (2005), however, confirm the ‘young’ or rather ‘younger’ but very much doubt the ‘affluent’.

Also the ‘overlap versus unique’ question is not clearly answered. Does the free newspaper indeed increase the amount of newspaper readers – even without cannibalizing the paid papers – or does the audience of free dailies mainly consist of people that already read paid papers. Increasing the audience would be important for society in general but also for advertisers.

Another issue concerns the amount of readers per copy. Critics of free dailies have often pointed to the waste free newspapers cause. On the other hand, publishers, claim a high readership, mainly because of many people leaving their paper at the subway or train after reading it, which would point to a very efficient medium and a high number of readers per copy.

Method and data

In this article we will use data from official auditing organizations in stead of data from papers themselves. The research is therefore limited to countries where free dailies participate in the audits and where this information is available to third parties. In some of these markets, however, free dailies are only audited for a limited number of years while in many cases only general or aggregated data is made public. We will use data from the Netherlands, USA, Belgium, Switzerland, France, Spain, Denmark, Australia, Korea, Sweden and Denmark.

Demographics

The often-repeated claim of free newspapers is their young and affluent readership. Steve Auckland, managing director of Metro UK (by Associated Newspapers) was quoted on the Timesonline website for saying that “the paper was ‘enormously popular with young, affluent readers’, and their average age was 34” (Goodman, 2007). Metro International, responsible for a total circulation of eight million worldwide everyday, sees their readers as: “young, well networked trend-setters, cash-rich but time-poor” (Metro, 2007). Australian free daily mX claims “mX has tapped into a unique audience of young, time-starved individuals who are increasingly difficult to reach using traditional media. (...) The mX reader is primarily 18-34 years” (MX, 2007). New York free daily AM NewYork: “Successfully targeting a younger, professional and more urban demographic than traditional newspapers” (AM New York, 2007). RedEye Chicago: “RedEye, an edition of the Chicago Tribune, has become the leading vehicle in Chicago for advertisers wanting to reach young, urban professionals who are short on time and long on disposable income” (Redeye, 2007).

At the Readership Research Symposium 2005, Mahoney and Collins (2005) showed that these claims were only partly true for four US-markets. Readers of free dailies were indeed younger although the average age was between 36 (Dallas) and 41 (Chicago). They were not *more* but *less* affluent while the most significant difference seemed to be the white/non-white distribution of the readers, a feature seldom advertised by free dailies themselves. Educational levels and male / female division in readership hardly differed (table 1).

Table 1 Readers profile in four US markets 2005

	<i>Paid Daily Readers</i>	<i>Free Daily Readers</i>
<i>New York</i>		
Average age	48	40
Household Income	\$107,000	\$90,000
White	66%	36%
<i>Boston</i>		
Average age	49	37
Household Income	\$98,000	\$78,000
White	88%	61%
<i>Chicago</i>		
Average age	46	41
Household Income	\$75,000	\$69,000
White	48%	37%
<i>Dallas</i>		
Average age	48	36
Household Income	\$96,000	\$63,000
White	68%	32%

Source: Mahoney & Collins, 2005, pp. 6-7

For other markets these features seem to hold in most cases. Household income, educational level and race are in most cases not reported but age is. In Sweden the age profile of free dailies is indeed different from that of paid ones. For each free paper the reach in the youngest two age groups (15-24 and 25-34) is higher than the average reach, their reach in the oldest groups (55 and older) is in all cases (except Metro Gothenburg) lower than average. Paid papers show a different picture, the reach in the youngest group is lower than average, but paid papers seem to have a more balanced readership with the reach in all groups (except the youngest) more or less around the average (figure 3). Male / female division again did not differ much.

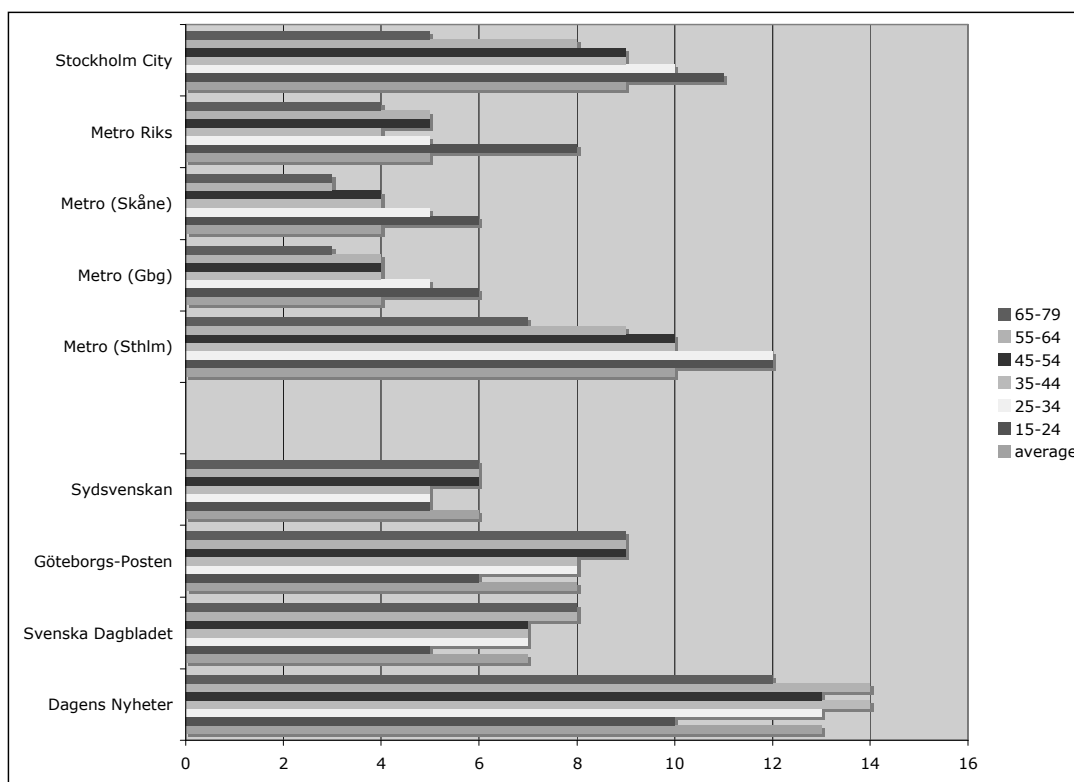


Figure 3: age profiles of paid and free dailies in Sweden, 2006.

Source: Orvesto Konsument 2006.

Although Wadbring (2007) only investigated readership profiles in Gothenburg, her results seem to support the findings on income and race by Mahoney and Collins (2005). In neighborhoods where lower income groups are dominant and relatively many non-Swedes live, the growth in total newspaper readership increased much more than in richer and more upper class neighborhoods, indicating a relatively high readership within these groups. In the Netherlands too, race is not reported, but a Foquz, a specialized ethno-marketing organization, reported after interviewing 2,400 Turks, Moroccans, and people from

former colonies Surinam and the Antilles that more than 50 percent of the people interviewed read either Metro of Spits, which is a much higher penetration than the Dutch average (Foquz Enthomarketing, 2007).

In Switzerland age, income, gender and educational level is measured. Gender differences between free and paid newspapers are only marginal. Age, again is the most significant difference (figure 4). Tabloid paper Blick has an age profile that is almost identical to the Swiss average. All other paid German language papers perform worse in the youngest age group. Free dailies 20 Minuten and heute have a much younger readership than average with more than 80 percent below the age of 55, evening paper heute scores even more than 50 percent below the age of 35. French language paid daily Le Matin has like Blick an average readership profile; both French language free dailies 20 Minutes and Le Matin Bleu, however, have more than 40% young (below 35) readers.

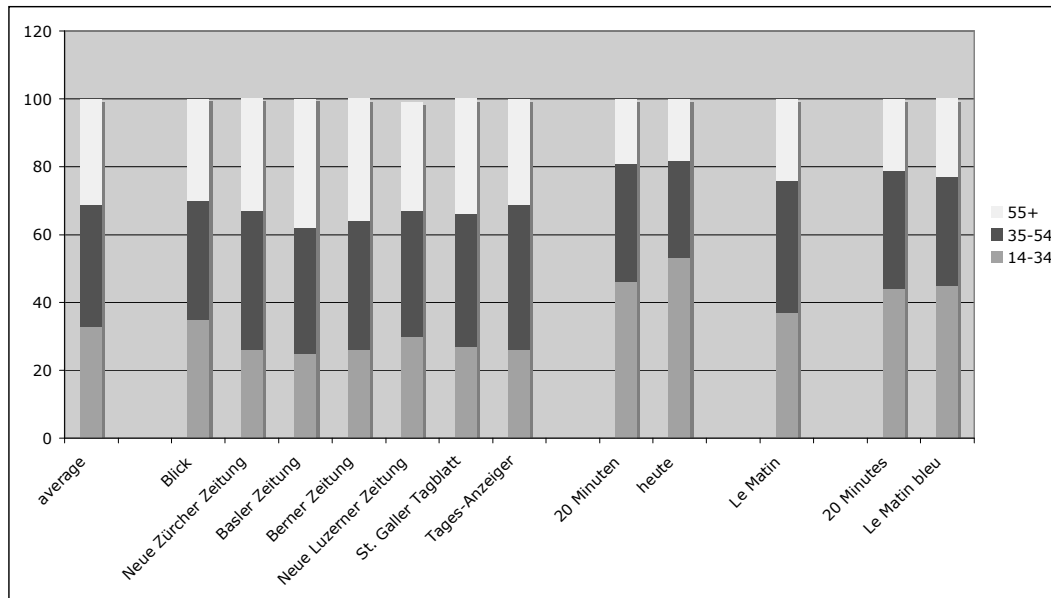


Figure 4: age profiles Swiss paid and free newspapers, 2005-2006

Source: MACH Basic 2006-2, WEMF, April 2005 - March 2006

For educational level and income only the German language paid papers and 20 Minuten can be compared. The free daily has a readership that is almost equal to the average. Tabloid Blick is the leader in the lowest segment (up to apprenticeship), followed by the St. Galler Tagblatt and 20 Minuten. The NZZ is by far the leader in the high education (college / university) group, followed at a distance by the Tages-Anzeiger and the Basler Zeitung (table 2). When the income of the different newspapers readers is compared, again NZZ is leader in the highest group, followed again by the Tages-Anzeiger and the Basler Zeitung. Free daily 20 Minuten is just above average.

Table 2: readership of Swiss free and paid papers, 2006

	<i>Educational level</i>			<i>Income</i>		
	<i>low</i>	<i>middle</i>	<i>high</i>	<i>low</i>	<i>average</i>	<i>high</i>
average	72	19	9	42	39	19
Neue Zürcher Zeitung	37	32	31	24	36	40
Basler Zeitung	62	25	13	38	41	21
Berner Zeitung	67	22	10	42	40	18
Blick	84	12	3	44	40	16
Neue Luzerner Zeitung	71	21	8	40	41	19
St. Galler Tagblatt	75	19	6	43	39	18
Tages-Anzeiger	54	28	18	28	40	32
20 Minuten	73	18	9	38	42	20

Source: MACH Basic 2006-2, WEMF, April 2005 - March 2006

For the Netherlands, the age hypothesis also holds. When free dailies Metro and Spits are compared to the five major national paid titles, they both stand out from the crowd, drawing more than 40 percent of their readers from the below 35 age group and scoring less than 10 percent in the above 65 group. Only one paper, de Volkskrant, has a readership age profile younger than average (figure 5).

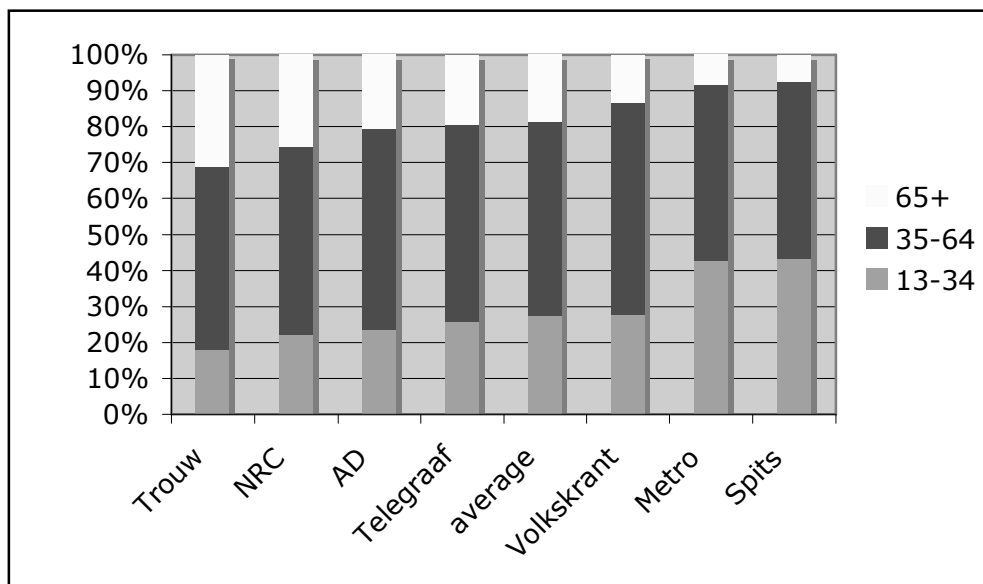


Figure 5: age profile paid and free dailies in the Netherlands, 2005.

Source: NOM Print Monitor 2005-II.

Income, again, paints a different picture. In the most wealthy group (W1) NRC, Volkskrant and to a lesser extend Trouw, are dominant, while the free dailies and popular papers AD and De Telegraaf draw only 20 percent of their readers from that group. The last four papers, in fact, have a very similar profile when income is concerned (figure 6).

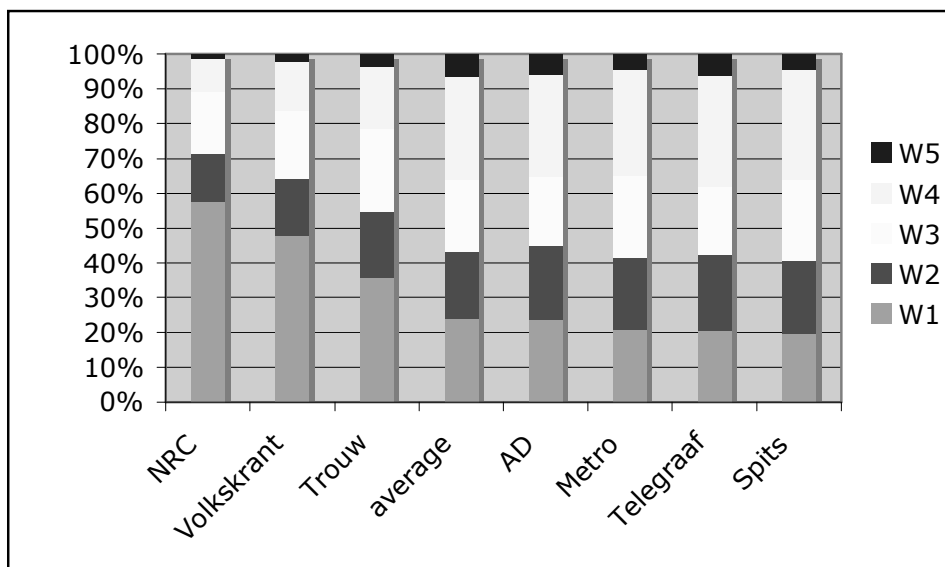


Figure 6: income profile paid and free dailies in the Netherlands, 2005.

Source: NOM Print Monitor 2005-II.

In Belgium the age difference is again striking. More than 50 percent of Metro’s readers are below the age of 35 for Metro (Concentra Group) and less than 14 percent is older than 55. Paid papers again have a older readership (figure 7).

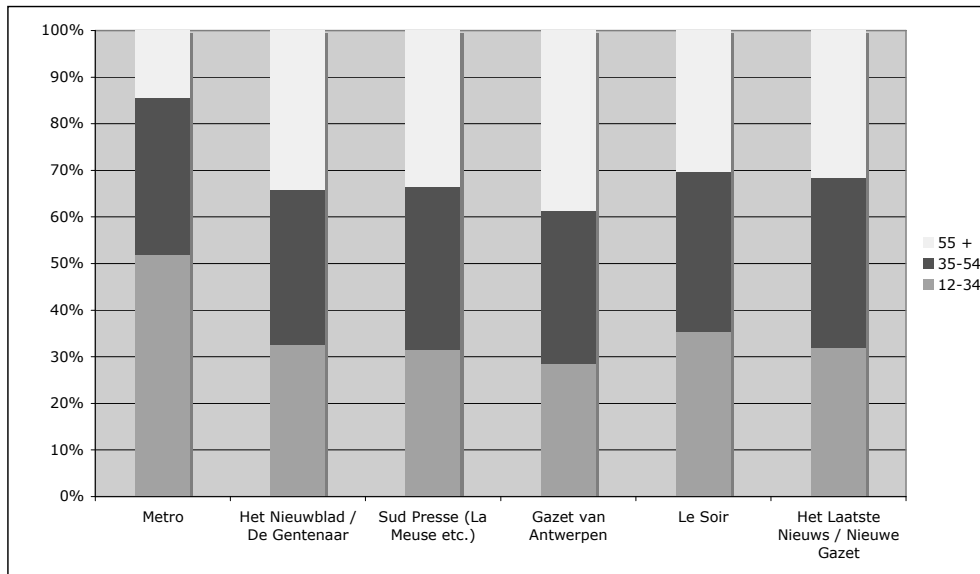


Figure 7: age profile paid and free dailies in Belgium, 2005-2006.

Source: CIM 2005-2006.

Educational differences are less prolific although Metro is after Le Soir the paper with the smallest share of low-education readers and also has the second highest share of high-educated readers (figure 8).

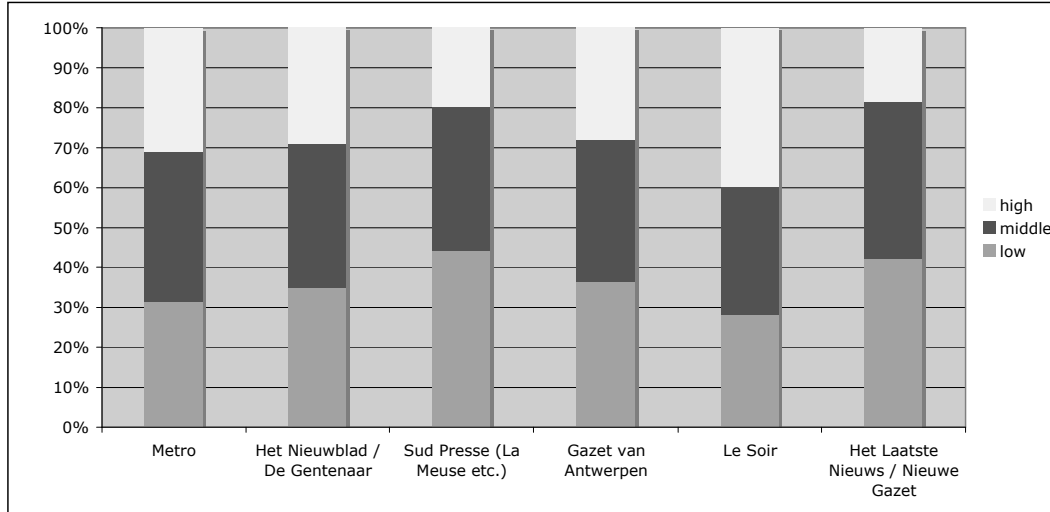


Figure 8: education of readers of paid and free dailies in Belgium, 2005-2006.

Source: CIM 2005-2006.

In Asia, the Korean capital Seoul has eight different free titles in 2007. In 2006, when the last readership data became available, there were five free dailies on the market, although only Daily Focus and Metro participated in the readership audit by Korea Media Index (KEI). The age profile of free papers differs significantly from the major paid papers. Total reach of free papers is far less than paid papers (below 3 percent) but as paid papers have their highest penetration in the older groups, the free titles show exactly the opposite: high in younger groups and low in older groups (figure 9).

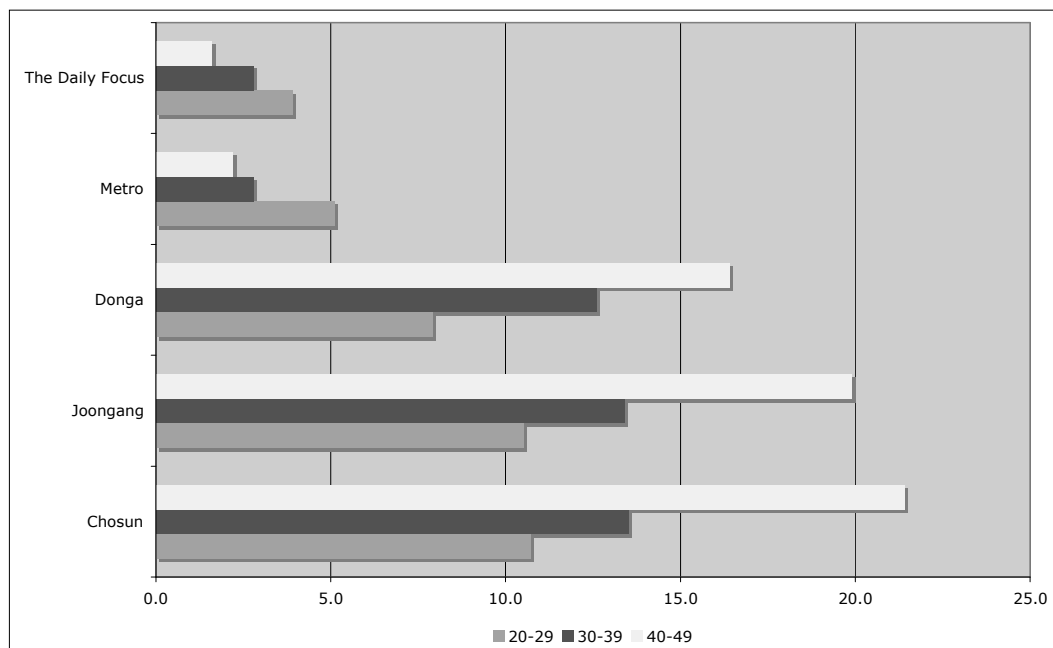


Figure 9: age profile of free and paid dailies Korea.

Source: Korea Media Index (KEI) Jan. - Apr. 2006.

Substitution, overlap and unique readership

Does the introduction of free newspapers increase total readership of newspapers or does the readership shows substantial overlap with paid readership? A third possibility - the one most feared by publishers of paid newspapers - is that readers will substitute paid for free dailies. In this paper we will not focus on substitution as this was already covered and was not very likely or was only found to be minimal. Mahoney and Collins (2005) found no proof substitution in four US markets:

Trends wherein there is stability in overall readership levels, declines in paid newspaper readership and increases in free tabloid readership – the pattern of evidence to be found with substantial switching from paid to free readership – are nowhere to be seen.

In Switzerland a national report on the development of the press also concluded that “there are no apparent substitution effects” (*Pressevielfalt Schweiz*, 2007, p. 19). An other European example from Spain, where more than half of the total weekday circulation consists of free dailies, might illustrate this too. All paid papers, except El Periodico and ABC gained readers after the introduction of free papers. 20 Minutos started in 2000 in Barcelona and Madrid; Metro launched in both cities in 2001. From 2003 on both papers expanded to other markets while Qué! and ADN were introduced in all major markets in 2005 and 2006 (table 3).

Table 3: readership of Spanish free and paid papers, 2000-2006

	2000	2001	2002	2003	2004	2005	2006
Marca	2256	2087	2255	2475	2619	2512	2391
el Pais	1447	1511	1603	1941	2155	2048	2058
El Mundo	996	948	1075	1169	1314	1342	1338
As	625	686	747	845	939	1015	990
El Periodico	839	767	764	831	884	854	789
ABC	923	802	813	802	903	840	739
La Vanguardia	623	615	629	653	800	649	697
<i>Free dailies</i>							
20 Minutos			857	1427	1862	2298	2379
Metro			877	1304	1605	1904	1675
Qué!						1923	1876
AND							1115

Source: AIMC

The two clear European examples of substitution seem to be Iceland and Denmark. For Iceland there is no public available readership data but the fact that two of the three paid dailies shut down in the last years indicates that the launch of two home delivered dailies in 2001 and 2005 might have some impact. The only remaining paid daily, however, has had a stable circulation since 1999. The Danish situation has some similarities to Iceland because also here home delivered papers were introduced.

Denmark saw the introduction of free commuter dailies in 2001 (MetroXpress and Urban) but after Icelandic publisher Dagsbrunn announced that they would launch home delivered free daily Nyhedsavisen, both leading Danish newspapers publishers JP/Politiken and Berlingske launched their own home delivered free dailies as well: 24timer and Dato (closed down April 2007). In October 2006 1.2 million free dailies were delivered to Danish households while another 800,000 were handed out to commuters. While both tabloids B.T. and Ekstra Bladet already lost readers in the first half of 2006, all other papers saw substantial drops in readership in the second half of 2006 and the first six months of 2007. Also existing free dailies MetroXpress and Urban lost readers. This distribution method and the fact that paid dailies in Denmark are the most expensive in Europe, might be explanations.

Table 4: readership of Danish free and paid papers, 2005-2007

	2005 II	2006 I	2006 II	2007 I
B.T.	460	417	402	383
Berlingske Tidende	356	360	352	342
Ekstra Bladet	462	442	418	396
Information	101	109	106	102
Jyllands-Posten	575	617	545	519
Politiken	463	461	439	429
Fyens Stiftstidende	176	176	169	164
Nordjyske Stiftstidende	199	204	187	183
<i>Free dailies</i>				
Urban	578	624	568	528
MetroXpress	646	680	629	574
24timer (August 2006)				443
Nyhedsavisen (October 2006)				320

Source: TNS Gallup

With substitution not very likely, the question is whether free dailies indeed attract new readers. According to Mahoney and Collins (2005) “the patterns of reading behavior suggest very high levels of free/paid duplicated reading” (p. 10). In New York 78 percent of the Am NewYork readers read a paid daily too, while 72 percent of the Metro readers did. There also was a substantial overlap between the free dailies, more than 50 percent of their audience read the other title on the same day. In Chicago overlap between paid and free was even higher: more than 90 percent, duplication between free dailies, however, was lower than in New York. In Dallas 75 percent of the readers of Quick read a paid daily. In Boston overlap between paid and free was 63 percent.

But even moderate levels of ‘unique’ free readership can mean substantial numbers of readers. Paid readership in the Netherlands went down from 70.8 percent (2002/2004) to 62.7 percent (2005/2006). With free papers included, readership dropped with 5.3 percent to 70.5. The main national paid morning papers lost readers, free papers gained. The percentage of unique free daily readers increases from 5 to 7.8 percent (table 5). As overlap between free dailies is not reported, total free readership must be least 12.7 percent in the last period (total overlap) and can be 25 percent at the most (no overlap). As neither option seems very likely because distribution systems are only partly similar, a total free readership of 16 or 17 percent at least can be assumed. This would mean that in the Dutch market there is also substantial overlap between free and paid readership although it is probably around the 50 percent.

Table 5: readership of Dutch free and paid papers, 2002-2006

	May '02 - April '04	May '03 - April '04	Nov. '03 - Oct. '04	May '04 - April '05	Nov. '04 - Oct. '05	May '05 - April '06
total paid	70.8	69.9	67.3	65.2	64.7	62.7
total	75.8	74.8	73.1	71.3	71.8	70.5
<i>paid national titles</i>						
De Telegraaf	18.8	18.1	17.5	16.5	16.1	16.3
de Volkskrant	6.3	6.0	5.8	5.2	5.7	5.5
Trouw	2.7	2.6	2.3	2.0	2.4	2.3
<i>free titles</i>						
Metro	8.9	8.2	9.3	12.0	12.0	12.3
Spits	11.4	10.9	11.6	12.5	12.5	12.7

Source: NOM Printmonitor

The 5 to 7.8 percent unique free daily readership, however, means 680,000 readers in the first period and more than a million in the last. The average audited circulation of free papers was 674,000 in the first period and 876,000 in the last. In 2002/2004 every free copy added one reader to the total Dutch readership; in 2005/2006 this was 1.2.

In neighbouring country Belgium only one free paper is published, Metro, by the Roularta group. The 2005/2006 survey by CIM showed that total readership without free papers was 51.4 percent and 55.4 percent with Metro included. Because Metro has a reach of 9.3 percent (842,000 readers), 5 percent is 'unique readership' while 4.3 percent consists of double readership. With an average circulation of 224,000 in these two years, every Metro copy adds 1.7 readers to the total readership.

Wadbring (2007) analyzed the Göteborg market and found that between 1998 and 2004 readership of paid newspapers dropped from 82 to 78 percent in 'resource-rich' districts in the city; readership of all newspapers (including Metro) increased from 83 to 87 percent. In 'resource-poor' districts, paid readership went down from 57 to 50 percent while total readership went up from 76 to 79 percent. Unique free readership in 2004 was 9 percent in 'resource-rich' districts and 29 percent in 'resource-poor' districts. As Metro had a readership of 19 percent in the richer districts, less than half of its circulation consisted of unique readers. In poorer districts where Metro's readership was 45 percent, more than half of its readers only read Metro.

Research from Switzerland also supports these findings as free dailies seem to extended their readership most in groups that are underrepresented in the readership of paid paper (*Pressevielfalt Schweiz*, 2007, p. 20-21). In general the newspaper reading audience in German speaking Switzerland increased with 4 percent from 2001 to 2006, a growth that can mainly be attributed to free newspapers.

Readers per copy

In this last section we will compare readership with circulation data to assess the number of readers per copy. Two trends can be expected: first a growth of the number of readers per copy over the years because free papers will become more established brands. When a free competitor arrives readership could drop as readers will have more papers to chose from and papers will have to use more diverse distribution methods, mostly channels outside public transport were the chance of more readers per copy is less likely. In general, we expect that distribution will have a major effect of circulation, with home delivery having the lowest number of readers per copy and purely public transport distribution will lead to a high number of readers per copies.

In most cases the number of readers per copy indeed is going up as long as there is no competition. This can be seen in Belgium, France, the Netherlands, and Spain. Sweden seems to be an exception because there is a stable readership, but it must be noted that free dailies were already introduced in 1995 (Stockholm), 1998 (Göteborg) and 1999 (Skåne). The national (Riks) Metro edition was introduced in 2004 and shows a growth of readers per copy from 2005 on. Stockholm City was launched in 2002. Also 20 Minuten Switzerland is around for several years (since 1999) which could explain the lack of growth. In Australia mX Melbourne shows a growth since the launch in 2001 (table 6).

Competition (indicated as grey areas in table 6) causes the number of readers per copy to drop as can be seen in Denmark and to some extent in Sweden. In Spain 20 Minutos lost in the first competition year but recovered while Metro seemed to be unaffected. In Switzerland 20 was not affected by 'heute', but as this is an evening paper no real competition exists.

Table 6: readers per copy, 2001-2007*

		2001	2002	2003	2004	2005	2006	2007
Belgium	Metro				2.3		3.7	
Denmark	URBAN					2.6	2.5	1.6
	MetroXpress					2.7	2.9	2.4
	Nyhedsavisen							0.6
	24timer							1.0
France	20 Minutes						2.5	2.8
	Metro						1.8	2.3
Netherlands	Metro			3.7	3.7	3.9	3.9	
	Spits			4.2	4.4	4.4	4.9	
Spain	20 Minutos		1.7	2.6	2.9	2.3	2.5	
	Metro		2.2	2.2	2.3	2.3	2.2	
	Qué!					2.0	1.9	
	AND						1.2	
Sweden	Metro (Sthlm)				2.6	2.6	2.5	2.5
	Stockholm City				2.0	2.0	2.0	1.9
	Punkt SE Stockholm							2.0
	Metro (Gbg)				3.0	3.1	2.9	2.8
	City Göteborg							2.5
	Punkt SE Öresund							1.6
	Metro (Skåne)				3.2	2.9	2.8	2.5
	City Malmö/Lund							2.3
	Punkt SE Göteborg							1.4
	Metro Riks					1.6	2.0	2.3
Switzerland	20 Minuten				2.8	2.7	2.8	
	heute						1.1	
	Le Matin bleu						1.9	
	20 Minutes						1.6	
Australia	mX Sydney					1.0	0.7	1.0
	mX Melbourne	1.2	1.4	1.5	1.5	1.6	1.5	1.7

* As time spans for readership research and circulation audits mostly are not exactly similar a 'best fit' method is used. Example: when readership is measured from Nov. 2005 to April 2006, it is regarded as 2006.

The number of readers per copy differs, although in most cases papers have two or more readers per copy. Three or more readers per copy can be seen in Belgium and the Netherlands. Australia and heute in Switzerland (both afternoon papers) have a low number of readers per copies, while also home delivered Nyhedsavisen and 24timer do not perform well in this respect.

Conclusion

Free daily newspapers have changed the newspaper landscape and the readership of newspapers profoundly. Paid papers see their circulation drop while their readers are getting older every year. Free papers are moving in, looking for a new and younger audience. But when age, income and education are concerned, it seems quite clear that you can't have it both ways. If you have a younger audience, something almost every free daily has, you also end up with a less wealthy audience. The audience of the free paper does not consist of former paid readers; substitution – except in a few cases – is not very likely. The high overlap between free and paid, reported on the American market (Mahoney & Collins, 2005), however, is not found in the (European) cases reported here. Overlap is still substantial but in the cases studied it was more around 50 percent. This means that free papers indeed seem to add a substantial number of readers to total readership. When free papers are around for a longer time they seem to grow faster in readership than in circulation: the number of readers per copy goes up in most cases. Competition of other free titles, however, leads in most cases to a decline in the number of readers per copy. This leads to the conclusion that paid and free papers might not be perfect competitors but free papers do compete among themselves.

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Readership data

- Australia: Roy Morgan. www.roymorgan.com.au/
- Belgium: CIM. www.cim.be/
- Denmark: TNS Gallup. www2.tns-gallup.dk/
- France: EUROPQN.
- Korea: Korean Media Index.
- Spain: AIMC. www.aimc.es/
- Sweden: Orvesto Konsument. www.sifomedia.se.
- Switzerland: MACH Basic. www.wemf.ch/de/
- The Netherlands: NOM Printmonitor. www.nommedia.nl.