



MONTANA

Statewide Media Habits Survey

**Data from a telephone survey of 526 adults in Montana,
conducted April-May 2015.**

Methodology

The survey was completed April-May 2015, among 526 adults in Montana and has a margin of error of $\pm 4.3\%$.

The survey was fielded by the Bureau of Business and Economic Research at the University of Montana-Missoula with questionnaire and analytical assistance from Nicole McCleskey of Public Opinion Strategies.

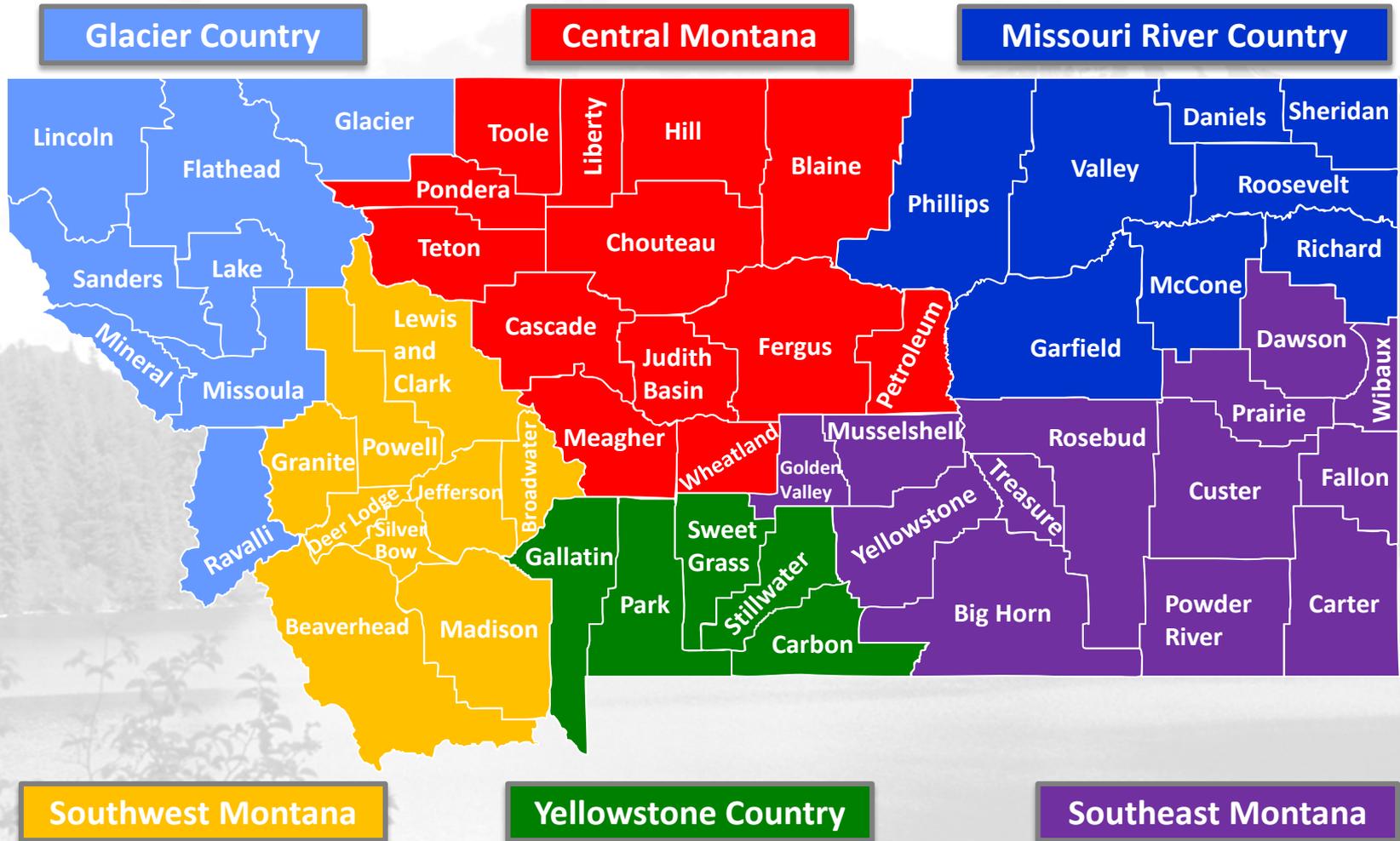
Methodology

- **Population represented: Montana residents ages 18+**
- **Type of sample: probability**
- **Mode of data collection: telephone (landline and cell)**
- **Are the data weighted? Yes, to state targets from U.S. Census Bureau, Gallup, and phone type estimates by U.S. National Center for Health Statistics**
- **Full question wording may be obtained from John Baldrige of UM BBER: john.baldrige@umontana.edu**

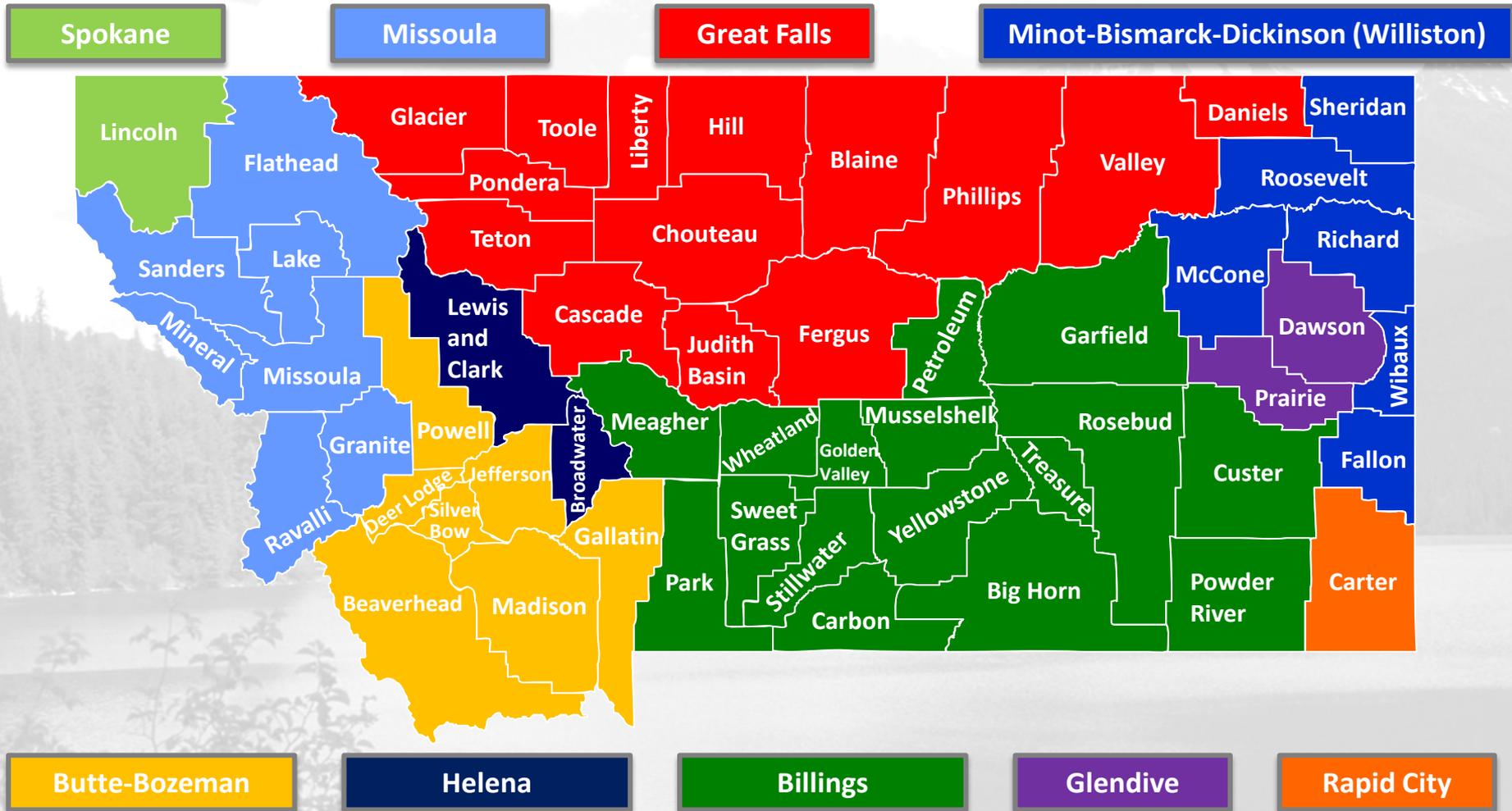
Key Findings

- **Television remains a key source of news and information**
- **Local news from all sources is very closely followed and highly sought after**
- **The rate of internet access in homes now matches that found nationwide**
- **Handheld devices are used by a significant portion of Montanans to access news**

Montana - Regions Map



Montana - Media Market Map



Key Demographics

Education



High School or Less	33%
Some College	32%
College +	34%

Party Affiliation



Republican	50%
Independent	17%
Democrat	33%

Gender/Age



Male	Age 18-34	29%
50%	Age 35-44	15%
Female	Age 45-54	19%
50%	Age 55-64	19%
	Age 65+	20%

Ethnicity



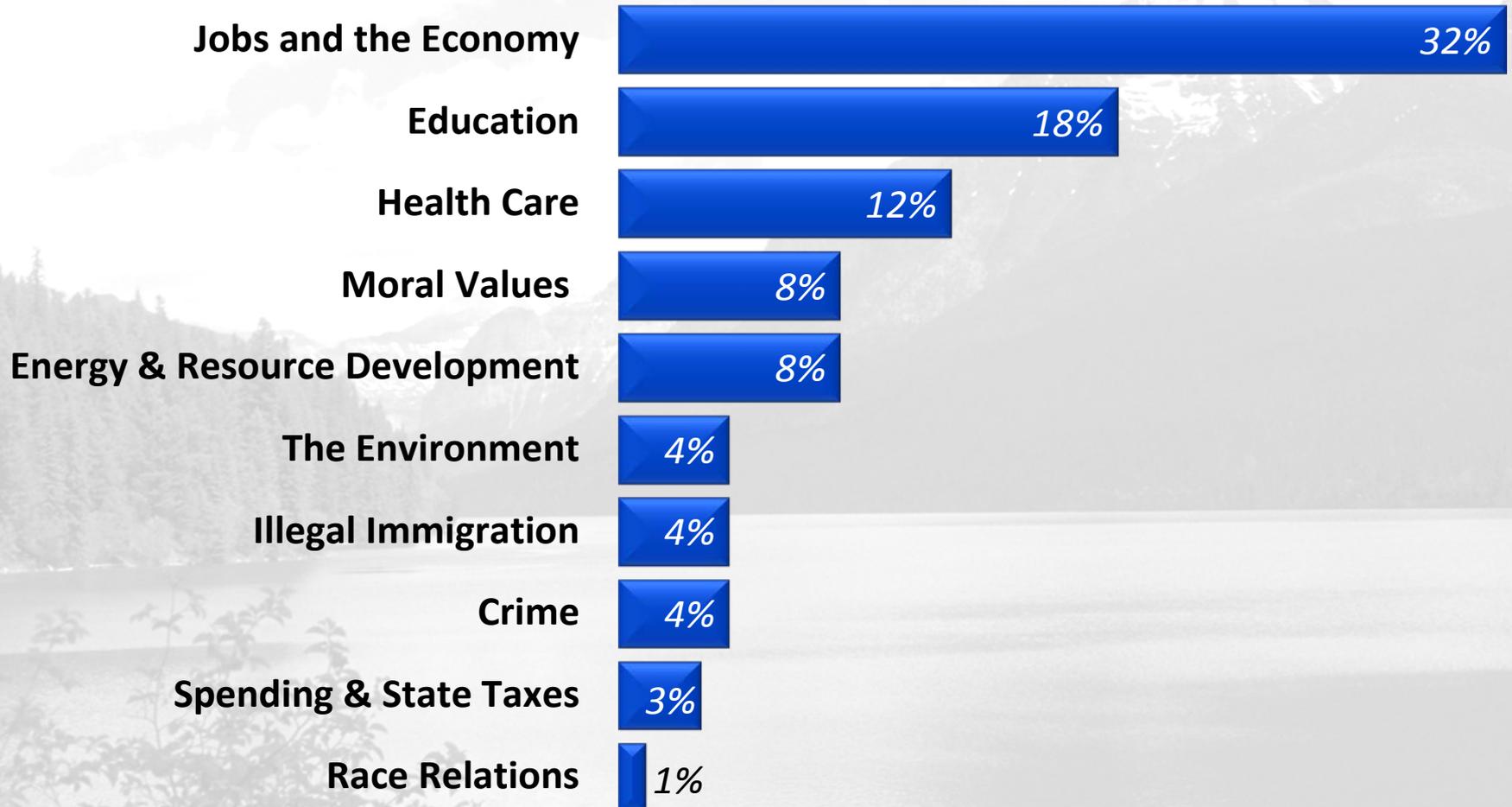
White	86%
Hispanic, Spanish	4%
African American, Black	-
Asian	1%
American Indian	7%



Issues

Jobs & the Economy tops the list of issues facing the state.

“Turning now to some issues, which ONE of the following issues is currently the most important issue facing the state?”

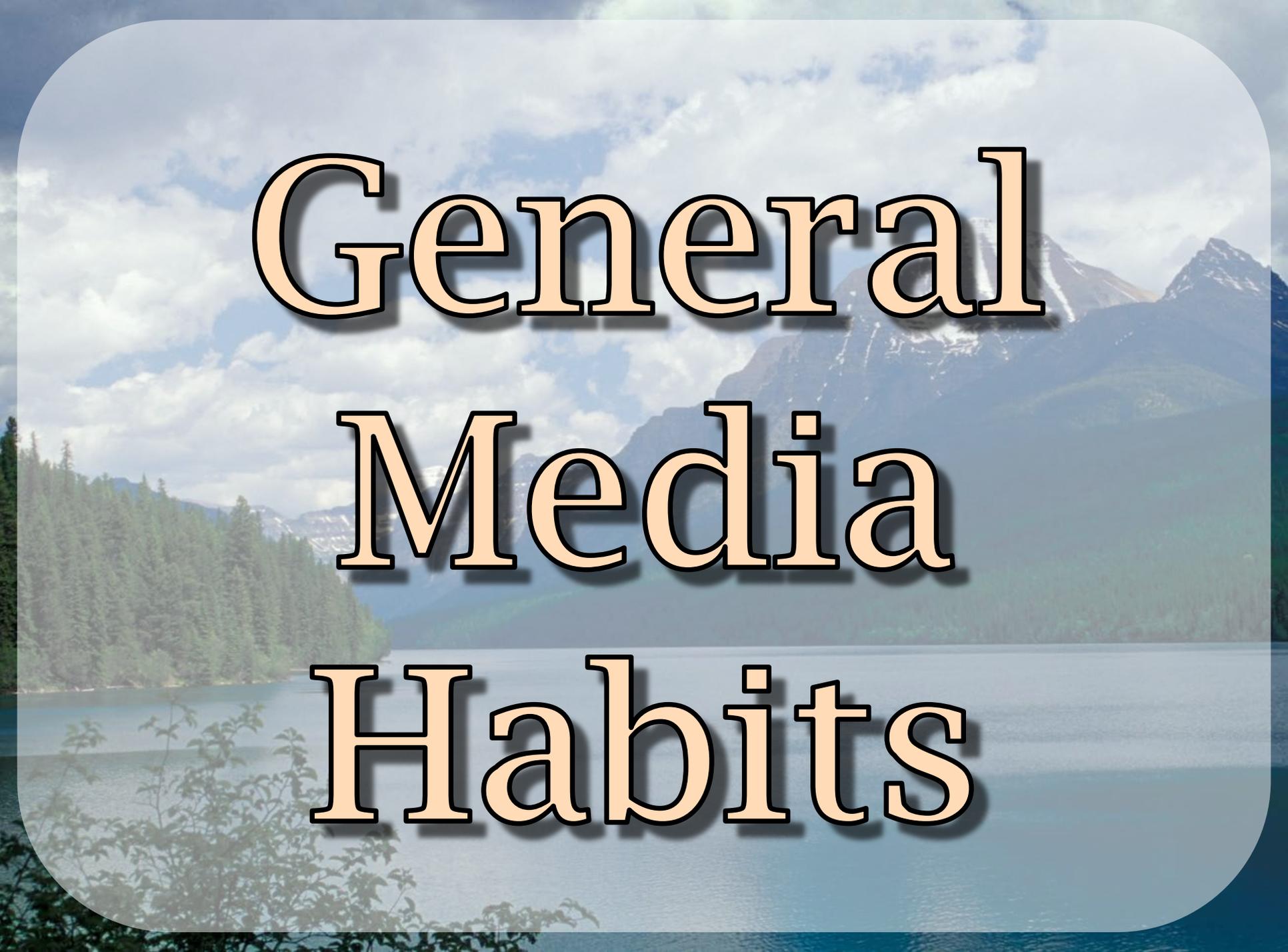


Top Issues By Gender/Age

<u>Men 18-49</u>	<u>Men 50+</u>	<u>Women 18-49</u>	<u>Women 50+</u>
Jobs and the State Economy 29%	Jobs and the State Economy 35%	Education 26%	Jobs and the State Economy 38%
Education 15%	Health Care 12%	Jobs and the State Economy 24%	Education 22%
Moral Values 12%	The Environment 11%	Health Care 16%	Health Care 10%
Energy & Resource Development 12%	Education 10%	Moral Values 9%	Moral Values 5%
Health Care 9%	Illegal Immigration 9%	Energy & Resource Development 6%	Spending & State Taxes 5%

Top Issues By County Type

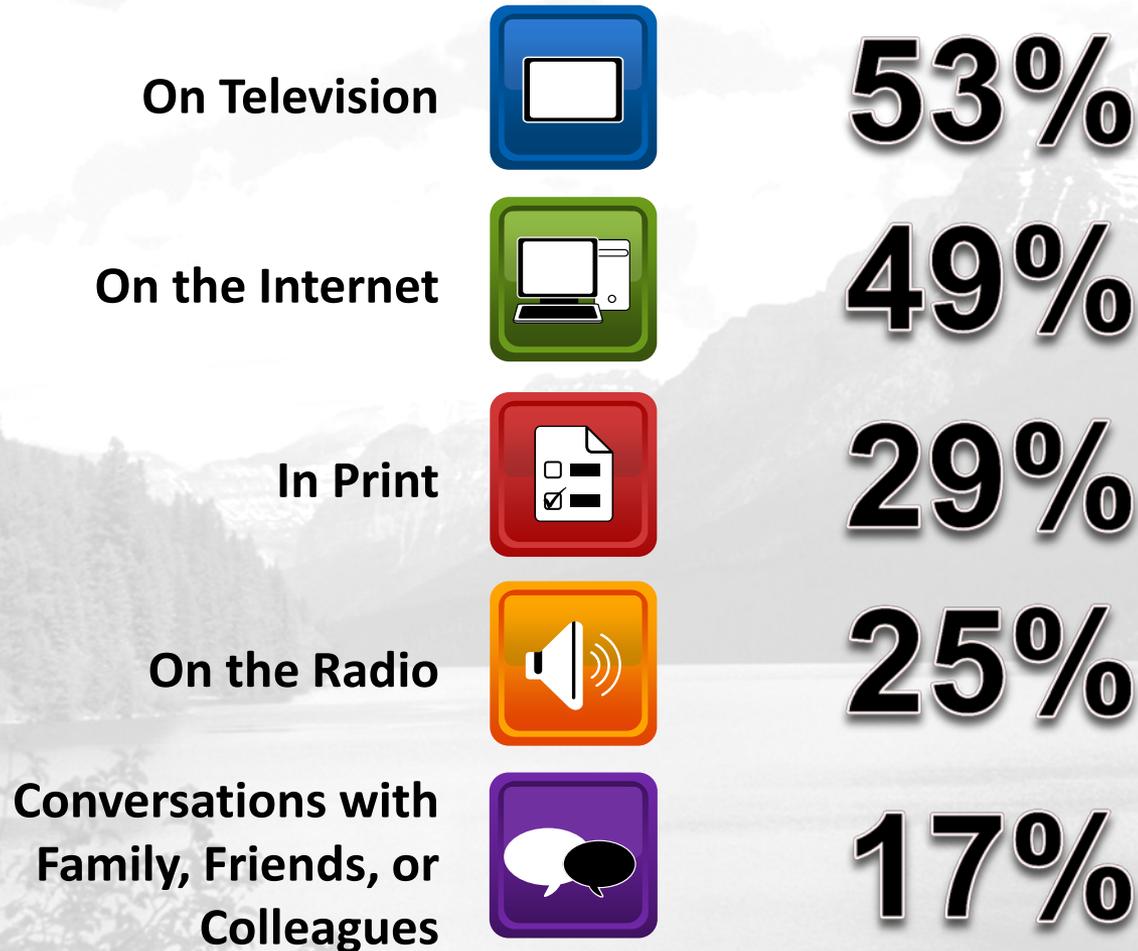
<u>Top 7 Counties</u>	<u>Other Counties</u>
Jobs and the State Economy 32%	Jobs and the State Economy 29%
Education 20%	Education 17%
Health Care 12%	Moral Values 11%
Energy & Resource Development 6%	Health Care 10%
Moral Values 6%	Energy & Resource Development 10%

A scenic landscape featuring a large, calm lake in the foreground, surrounded by dense green forests. In the background, majestic mountains with patches of snow rise against a blue sky filled with white, fluffy clouds. The entire scene is framed within a rounded rectangular border.

General Media Habits

Most adults turn to TV and the internet to get their news.

“Thinking about the news, how did you get your news in the past week?”



There are some significant differences in news consumption by gender and age.

<i>News Source by Gender/Age</i>	Men 18-49 (27%)	Men 50+ (23%)	Women 18-49 (25%)	Women 50+ (25%)
On Television	31%	68%	37%	77%
On the Internet	63%	35%	63%	34%
In Print	18%	36%	20%	42%
On the Radio	30%	27%	22%	19%
Conversations with Family, Friends, or Colleagues	17%	9%	25%	15%

Rural respondents are less plugged in to the internet for news.

<i>News Source by County Type</i>	Top 7 Counties (63%)	Other Counties (37%)
On Television	49%	57%
On the Internet	56%	39%
In Print	29%	27%
On the Radio	25%	24%
Conversations with Family, Friends, or Colleagues	18%	13%

There are differences in consumption by education attainment as well.

<i>News Source by Education & Opinion Elites</i>	High School or Less (33%)	Some College (32%)	College+ (34%)	Opinion Elites (15%)
On Television	62%	50%	46%	48%
On the Internet	36%	53%	58%	61%
In Print	24%	28%	34%	37%
On the Radio	23%	20%	30%	34%
Conversations with Family, Friends, or Colleagues	13%	19%	18%	20%

Two-thirds of adults say they have a trusted source of information.

“Do you have a source of news you consider a trusted source of information?”

Yes 62%

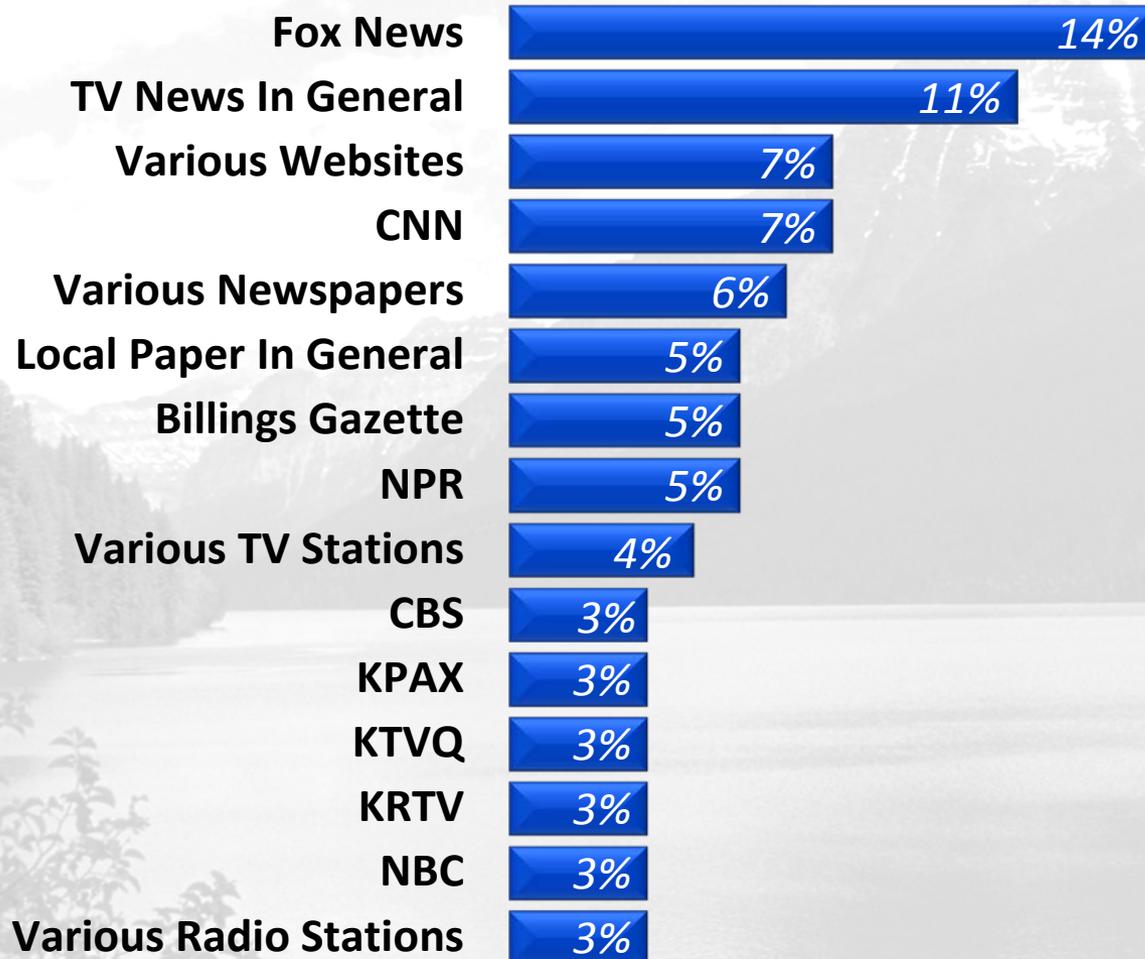
No 35%

Top Groups – Yes (62%)	
Opinion Elites	75%
Follow News Very Closely	75%
Ages 35-44	73%
Base Republicans	73%
Men College+	73%
Southwest Montana	72%
Base Democrats	72%
Democratic Men	72%
News Source – National Daily Paper	72%
College+	71%
Women College+	70%
News Source – Cable News	70%
Republican Women	69%
Employed Women	69%
Time on Internet – Daily	69%
News Source – News Magazines	69%
Butte DMA	68%
1-3 Hours Watching TV	68%

Fox News is most often cited as a trusted source.

“And, what specific news source do you consider a trusted source of information?”

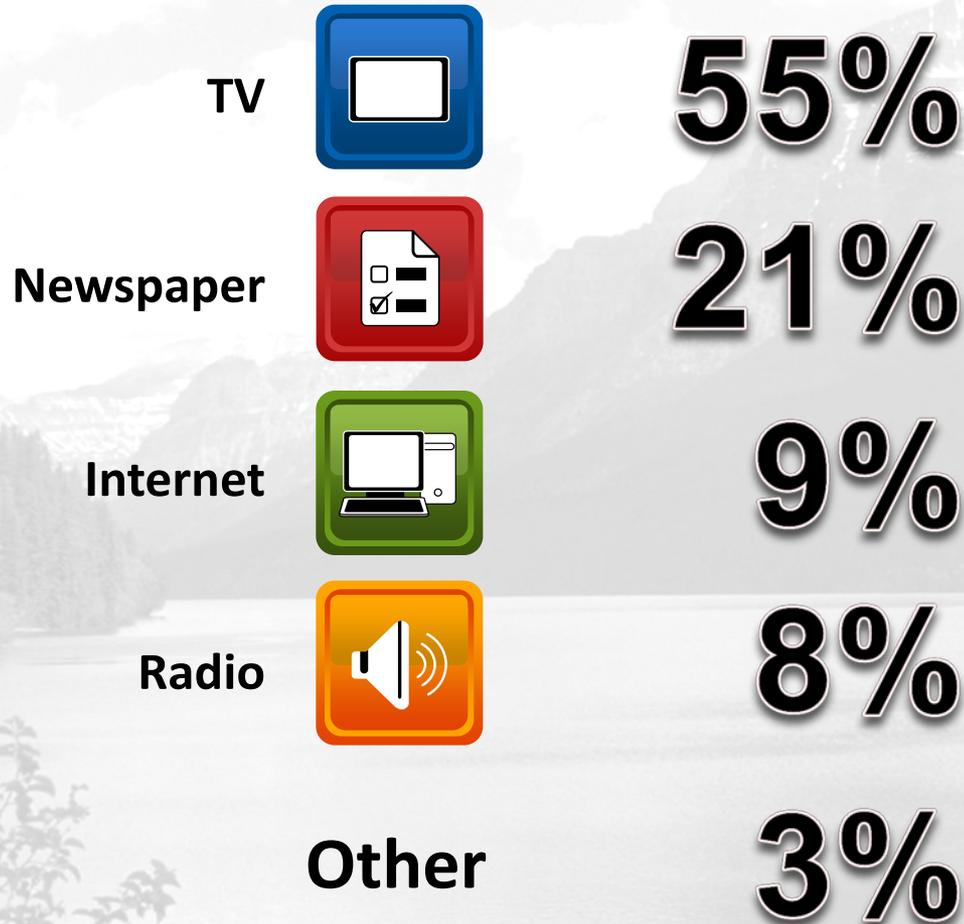
Among the 62% of Adults With a Trusted News Source



TV generally has more credibility.

“And, what specific news media do you consider a trusted source of information?”

Among the 62% of Adults With a Trusted News Source



Local news sources are dominant.

“Now, I’d like to know how often you access certain types of news sources. For each that I read, tell me if you watch or listen to it regularly, sometimes, hardly ever, or never.”

	Sometimes/ Regularly
Watch the <u>local news</u> about your viewing area which usually comes on before or after the national news in the evening and again later at night.	64%
Read a <u>local</u> daily newspaper such as the Missoulian, or the Billings Gazette.	63%
Read a <u>local</u> weekly community newspaper.	52%
Watch the nightly network news on CBS, ABC, NBC or PBS. This is different from local news shows about the area where you live.	43%
Watch cable news channels such as CNN, MSNBC, or Fox News.	41%
Watch Sunday morning news shows such as Meet the Press, This Week, or Face the Nation.	15%
Read news magazines such as Time or Newsweek.	14%
Read a national daily newspaper such as the New York Times, Washington Post or Wall Street Journal.	13%

News Source Access by County Type

<i>%Regularly</i>	Top 7 Counties (63%)	Other Counties (37%)
Watch the local news about your viewing area which usually comes on before or after the national news in the evening and again later at night.	38%	45%
Read a local daily newspaper such as the Missoulian, or the Billings Gazette.	37%	34%
Read a local weekly community newspaper.	21%	52%
Watch the nightly network news on CBS, ABC, NBC or PBS. This is different from local news shows about the area where you live.	29%	33%
Watch cable news channels such as CNN, MSNBC, or Fox News.	21%	26%
Watch Sunday morning news shows such as Meet the Press, This Week, or Face the Nation.	8%	8%
Read news magazines such as Time or Newsweek.	7%	4%
Read a national daily newspaper such as the New York Times, Washington Post or Wall Street Journal.	2%	5%

News Source Access by Gender/Age

% Regularly

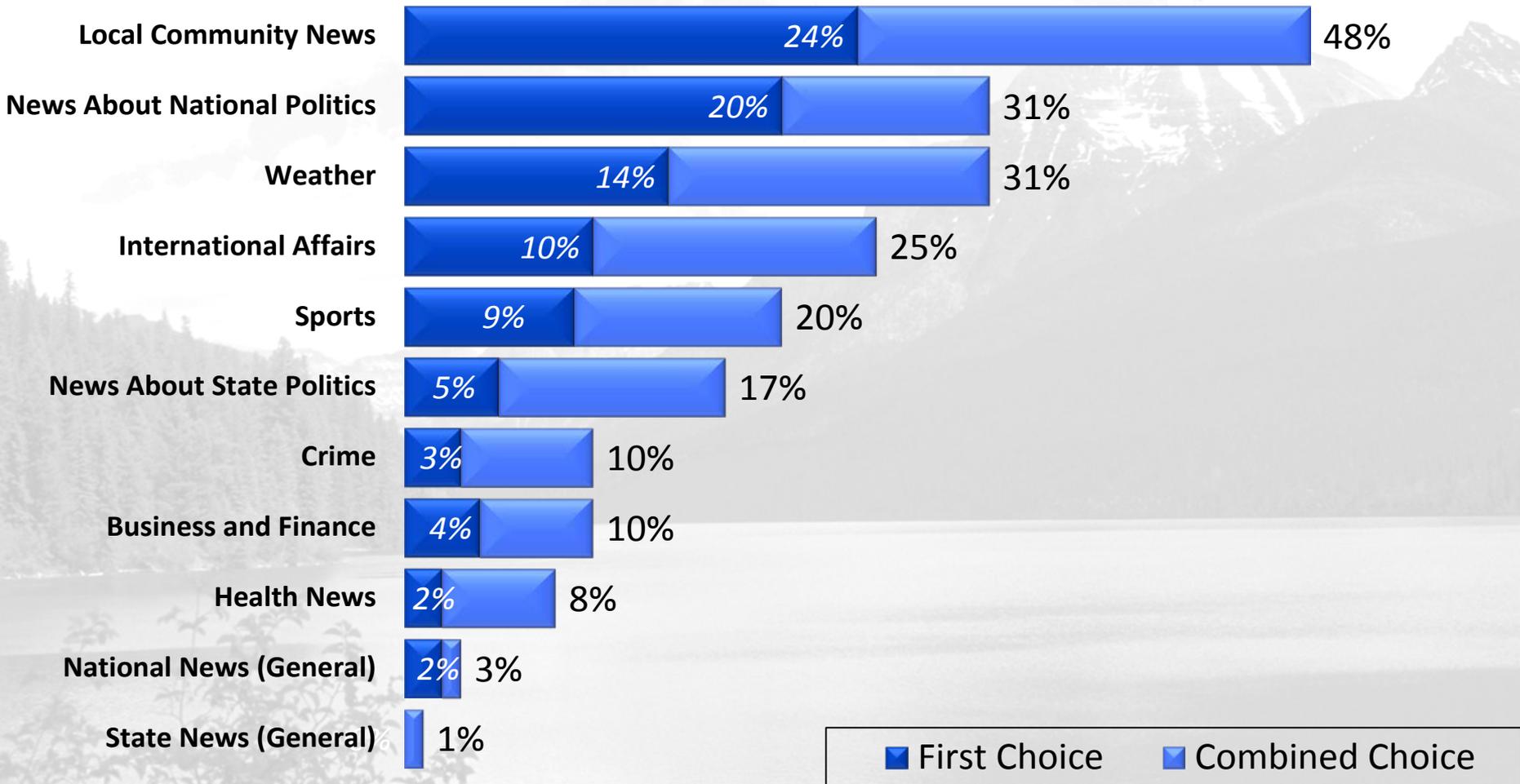
	Men 18-49 (27%)	Men 50+ (23%)	Women 18-49 (25%)	Women 50+ (25%)
Watch the local news about your viewing area which usually comes on before or after the national news in the evening and again later at night.	19%	56%	20%	72%
Read a local daily newspaper such as the Missoulian, or the Billings Gazette.	22%	44%	27%	54%
Read a local weekly community newspaper.	24%	36%	29%	43%
Watch the nightly network news on CBS, ABC, NBC or PBS. This is different from local news shows about the area where you live.	7%	44%	11%	62%
Watch cable news channels such as CNN, MSNBC, or Fox News.	16%	33%	14%	30%
Watch Sunday morning news shows such as Meet the Press, This Week, or Face the Nation.	2%	9%	3%	18%
Read news magazines such as Time or Newsweek.	7%	4%	3%	6%
Read a national daily newspaper such as the New York Times, Washington Post or Wall Street Journal.	3%	3%	3%	4%

News Source Access by Education & Opinion Elites

<i>% Regularly</i>	High School or Less (33%)	Some College (32%)	College+ (34%)	Opinion Elites (15%)
Watch the local news about your viewing area which usually comes on before or after the national news in the evening and again later at night.	45%	42%	36%	41%
Read a local daily newspaper such as the Missoulian, or the Billings Gazette.	29%	32%	46%	54%
Read a local weekly community newspaper.	34%	30%	32%	37%
Watch the nightly network news on CBS, ABC, NBC or PBS. This is different from local news shows about the area where you live.	34%	30%	26%	31%
Watch cable news channels such as CNN, MSNBC, or Fox News.	23%	22%	24%	21%
Watch Sunday morning news shows such as Meet the Press, This Week, or Face the Nation.	5%	9%	9%	9%
Read news magazines such as Time or Newsweek.	3%	2%	9%	14%
Read a national daily newspaper such as the New York Times, Washington Post or Wall Street Journal.	-	3%	6%	10%

Adults are most interested in community news stories.

"I'm going to read you a list of different types of news and information programming. Please tell me which two or three types of news and information programming interest you the most."



Top News Interests By Gender/Age

<u>Men 18-49</u>	<u>Men 50+</u>	<u>Women 18-49</u>	<u>Women 50+</u>
Local Community News 36%	Local Community News 49%	Local Community News 61%	Local Community News 47%
Sports 33%	News About National Politics 44%	Weather 30%	Weather 39%
News About National Politics 30%	Weather 27%	International Affairs 28%	News About National Politics 28%
International Affairs 29%	International Affairs 24%	News About National Politics 24%	International Affairs 18%
Weather 26%	Sports 23%	News About State Politics 17%	News About State Politics 18%

Top News Interests By County Type & DMA Regions

<u>Top 7 Counties</u>	<u>Other Counties</u>	<u>East/Central DMAs</u>	<u>West DMAs</u>
Local Community News 51%	Local Community News 43%	Local Community News 52%	Local Community News 45%
Weather 31%	News About National Politics 35%	News About National Politics 34%	Weather 31%
News About National Politics 29%	Weather 31%	Weather 30%	News About National Politics 29%
International Affairs 26%	International Affairs 22%	International Affairs 24%	International Affairs 26%
Sports 23%	News About State Politics 16%	Sports 20%	News About State Politics 20%

A scenic landscape featuring a calm blue lake in the foreground, a dense green forest on the left, and majestic snow-capped mountains in the background under a bright, cloudy sky. The entire scene is framed within a rounded rectangular border.

Media Habits: Television

TV news consumption shows local preference.

Watch Local News

64%

**Watch Nightly
Network News**

43%

Watch Cable News

41%

Montana adults who watch nightly news primarily tune into CBS and NBC.

“And, on which network or networks do you watch the nightly network news?”

 CBS	20%
 NBC	17%
 abc	11%
 PBS	7%

**Data Shown Among
Total Sample*

Among PBS viewers, PBS is a higher draw with more educated adults.

<i>Network Viewership by Education</i>	High School or Less (33%)	Some College (32%)	College+ (34%)
 CBS	21%	20%	20%
 NBC	17%	19%	15%
 abc	15%	7%	11%
 PBS	6%	3%	11%

**Data Shown Among Total Sample*

Cable news viewers tune in to Fox and CNN.

"And, which cable news channels do you watch?"

	24%
	19%
	6%

**Data Shown Among
Total Sample*

There is a partisan dimension to cable news preference.

Cable News Viewership by Party	Republicans (50%)	Independents (17%)	Democrats (33%)
	34%	16%	11%
	16%	20%	23%
	3%	3%	12%

**Data Shown Among Total Sample*

A majority of Montanans also watch non-news programming on television.

“Apart from the news, did you watch anything else on television yesterday?”

Yes 56%

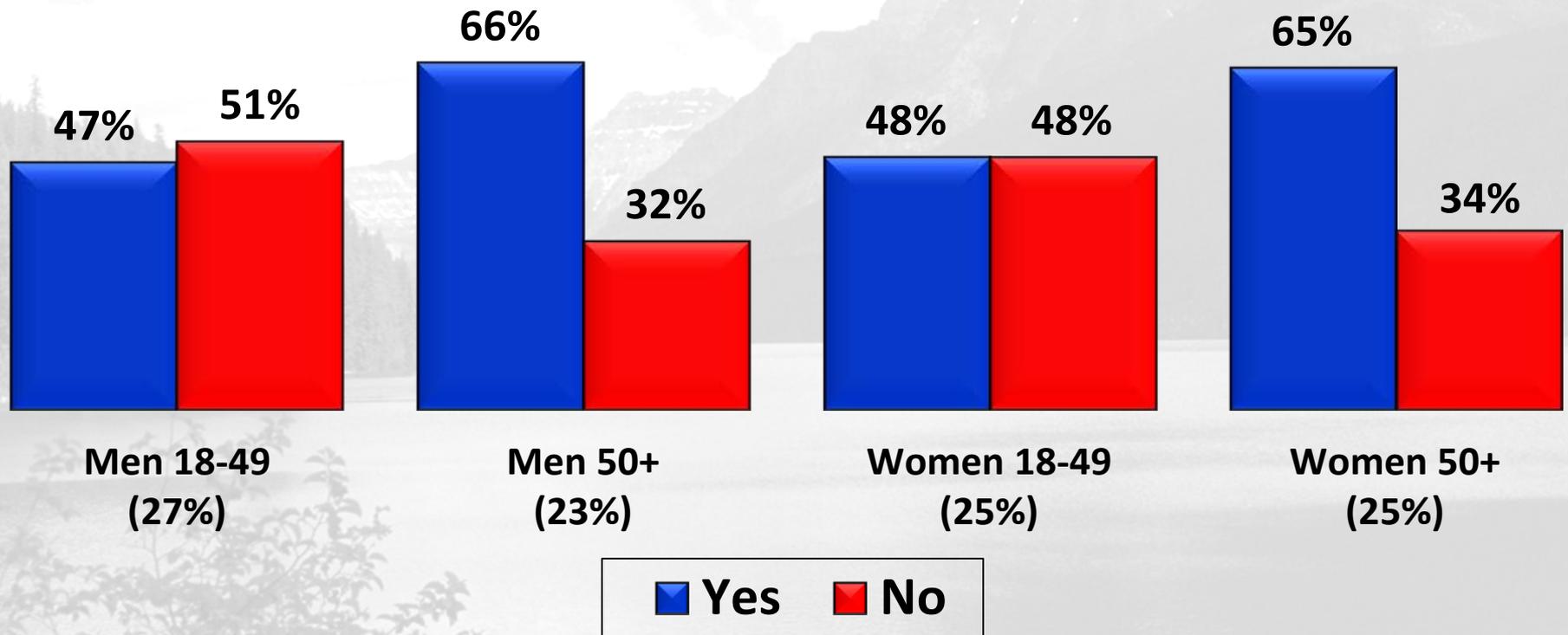
No 42%

“About how much time did you spend watching TV yesterday, not including the news?”

	%
Did Not Watch	42%
1-29 Minutes	5%
½ -1 Hour	11%
1-2 Hours	17%
2-3 Hours	11%
3-4 Hours	11%
4 Hours+	-

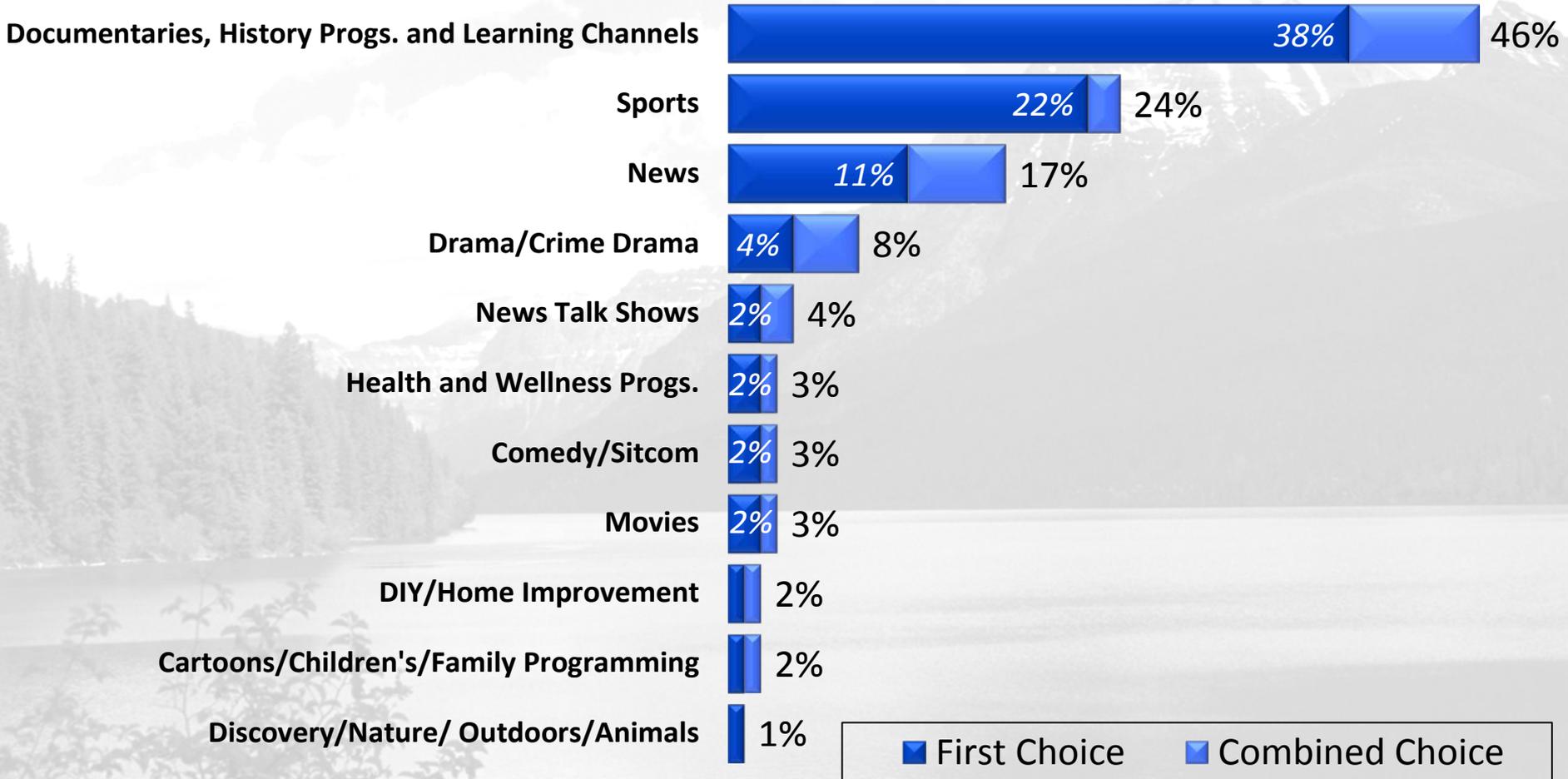
Older respondents are more likely to have watched TV.

Watched Television Yesterday Other Than News by Gender/Age



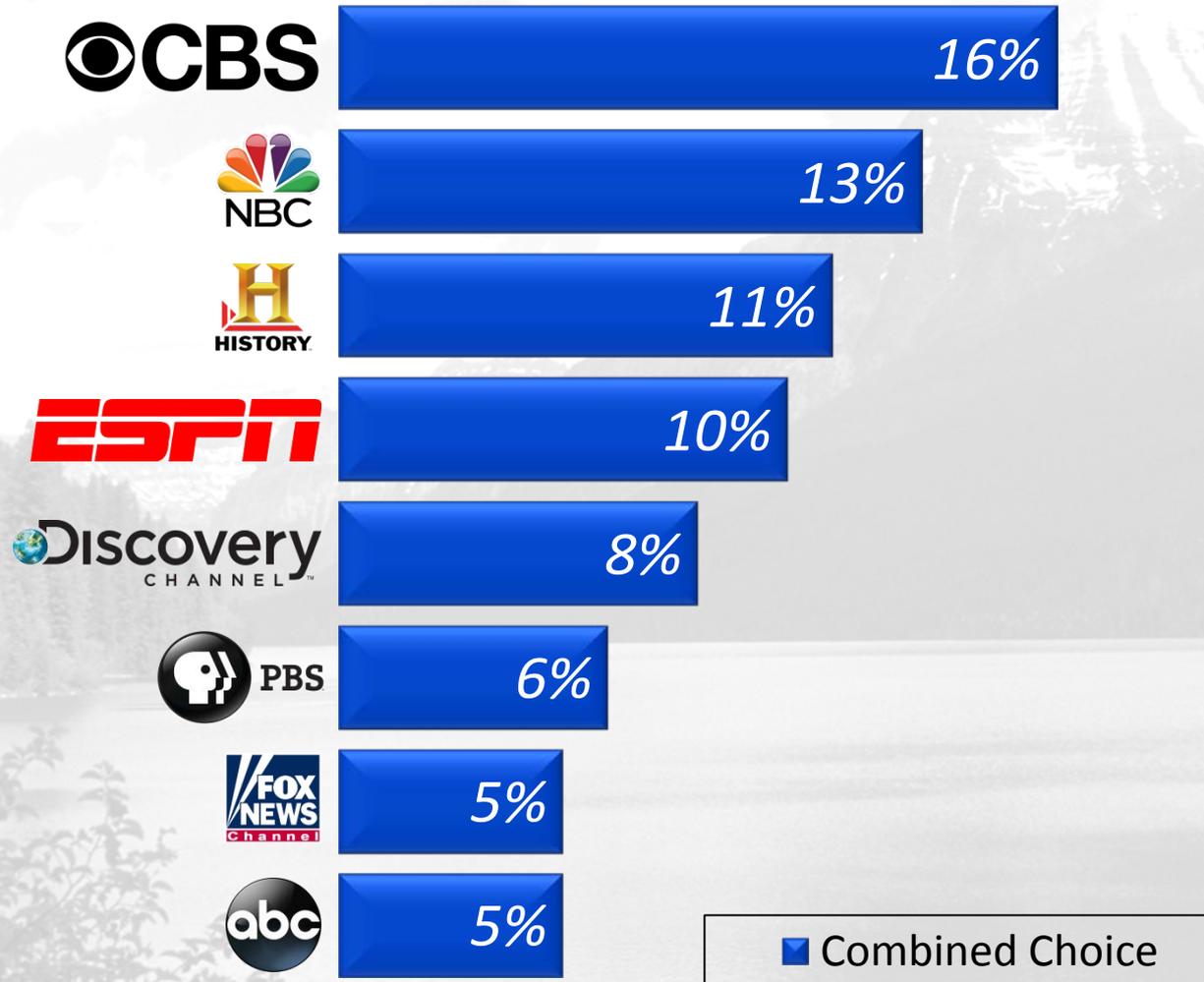
Documentaries and learning channels are adults' preferred informational TV programs.

“Now, thinking about the TV you watch...which one or two of the following types of informational TV shows, if any, do you most like to watch?”



And, in an open-ended question, one-in-five adults offer CBS as the channel they watch most frequently.

“And, what one or two television channels do you watch most often?”



A scenic landscape featuring a calm blue lake in the foreground, a dense green forest on the left, and snow-capped mountains in the background under a bright, cloudy sky. The text is overlaid on this scene.

Media Habits: Radio

Forty-two percent of Montana residents listen to the radio more than an hour per day.

“About how much time, if any, did you spend listening to the radio yesterday?”

Among All Adults

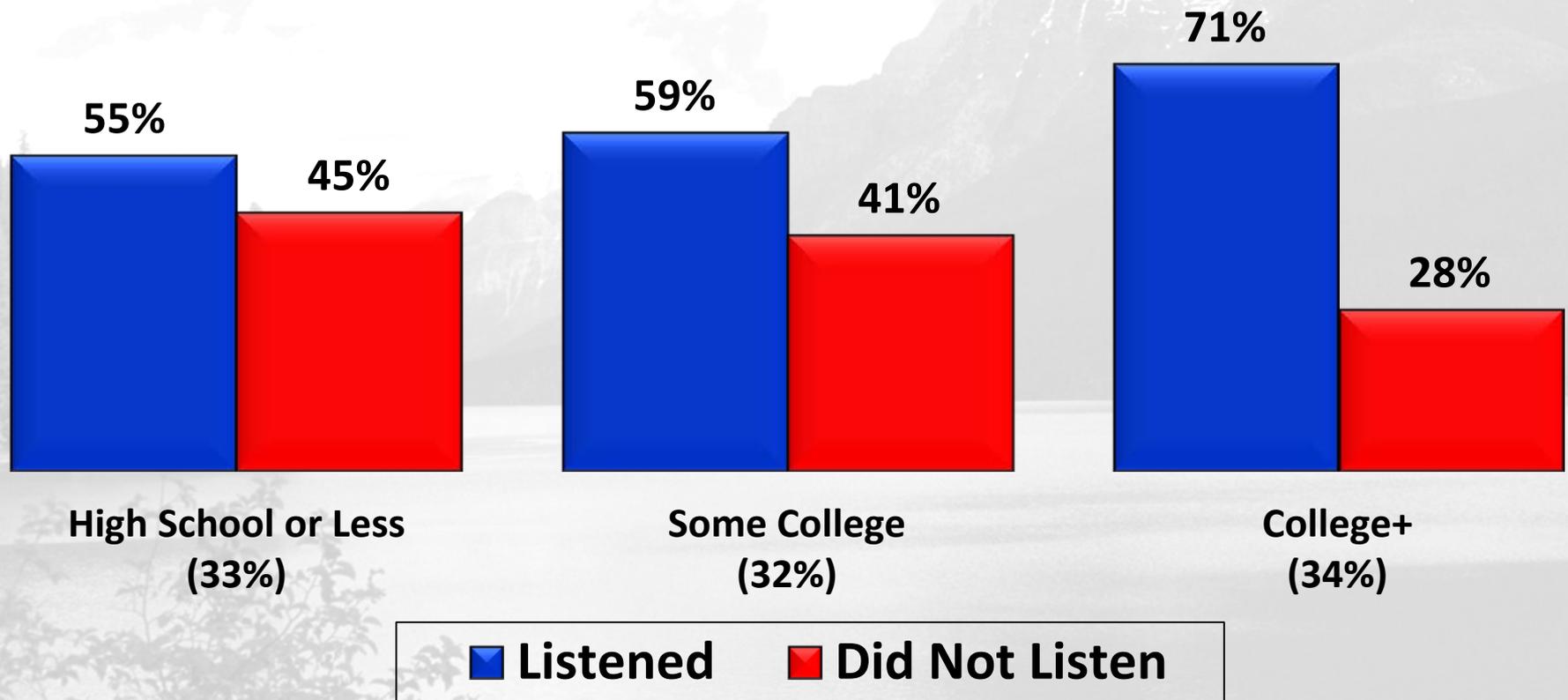
Listened **61%**

Did Not Listen **38%**

	%
Did Not Listen	38%
1-14 Minutes	3%
15-29 Minutes	5%
30-59 Minutes	11%
1 Hour or More	42%

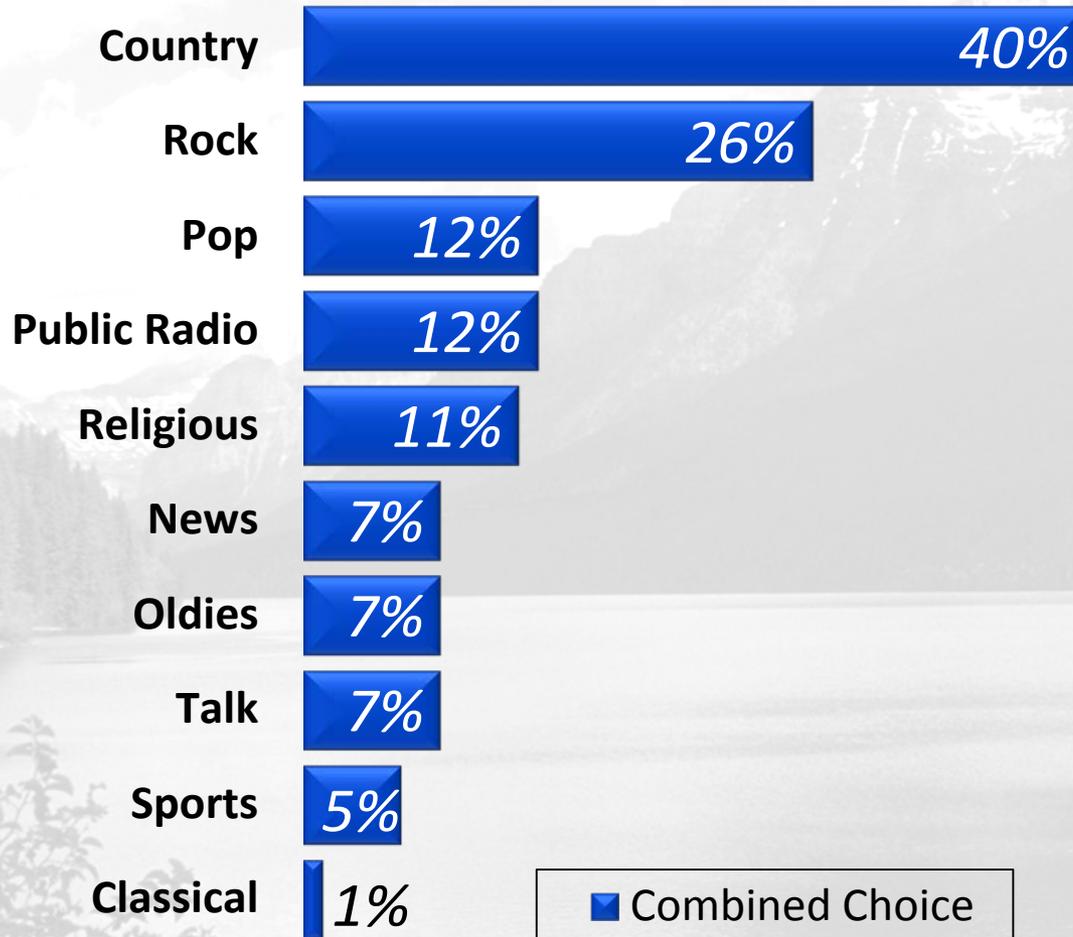
College-educated adults are more likely to listen to the radio.

Time Spent Listening to Radio by Education



Country and rock top the list of station preferences.

“And what one or two types of radio stations would you say you listen to most often?”



Urban & Suburban respondents are more apt to listen longer each day.

	Top 7 (63%)	Other (37%)
Did Not Listen	32%	49%
1-14 Minutes	3%	2%
15-29 Minutes	7%	4%
30-59 Minutes	13%	7%
1 Hour or More	44%	39%

	Top 7 (63%)	Other (37%)
Country	35%	49%
Rock	28%	23%
Religious	9%	13%
Public Radio	14%	19%
Pop	14%	19%
Oldies	8%	6%
News	6%	8%
Talk	7%	8%
Sports	7%	2%

The background of the slide is a scenic landscape. In the foreground, there is a calm blue lake reflecting the sky. The middle ground is filled with a dense forest of green evergreen trees. In the background, there are large, rugged mountains with patches of snow on their peaks and slopes. The sky is bright blue with scattered white clouds. The entire scene is framed by a semi-transparent blue overlay with rounded corners.

Media Habits: Internet

More than eight-in-ten adults have internet access at home.

“Do you have internet access at your home?”

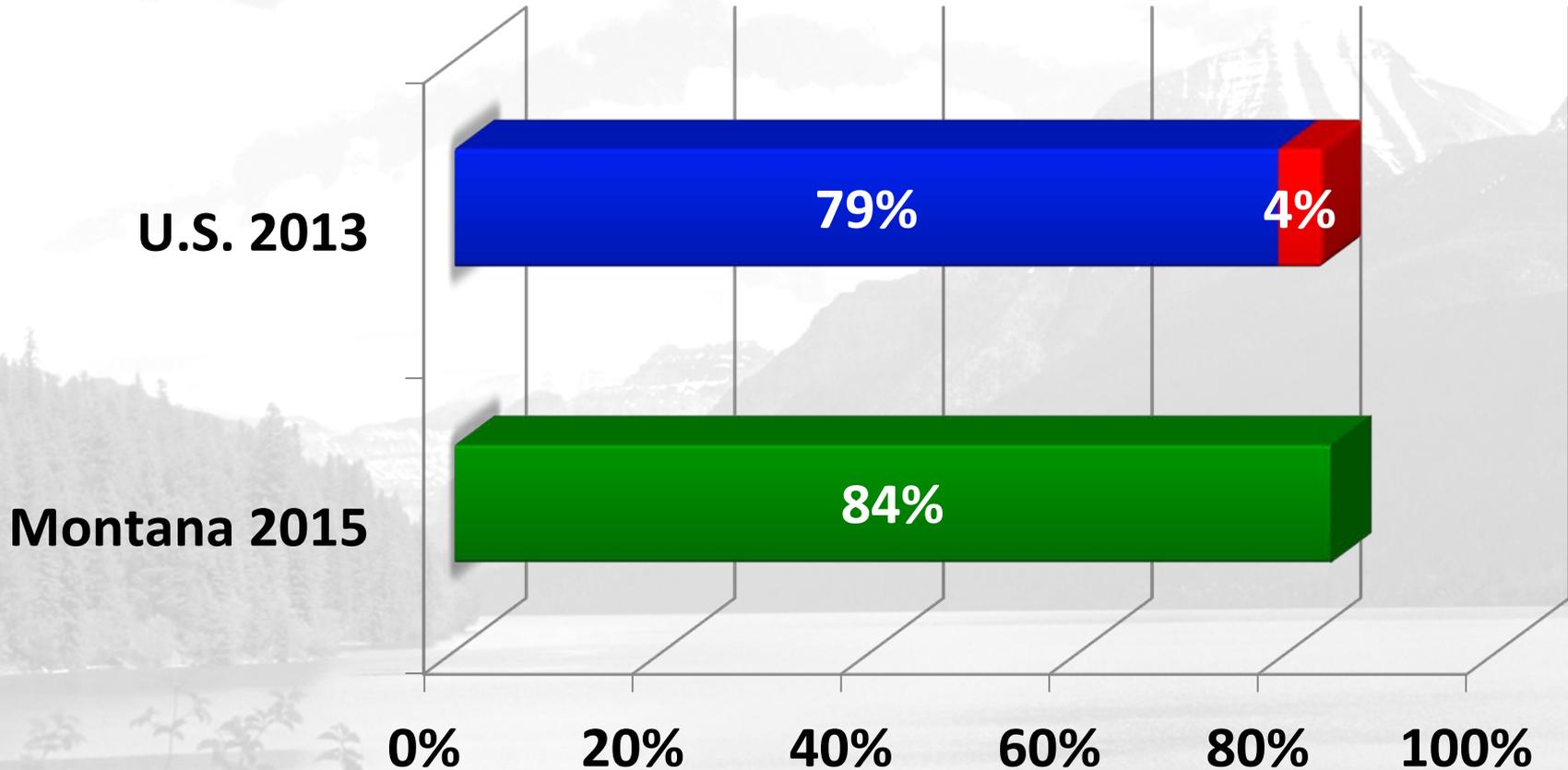
Yes 84%

No 16%

Top Groups – No (16%)	
Time on Internet – Less Often/Never	68%
Ages 65+	28%
Great Falls DMA	28%
High School or Less	28%
Retired	27%
Central Montana	26%
Men Income Under \$50K	25%
Independent Men	24%
Income Under \$50K	24%
Unemployed	24%
No Trusted News Source	24%
Women Income Under \$50K	23%
Men Ages 50+	22%
Independents	22%
Did Not Listen to Radio Yesterday	22%
Balance DMA	21%
Base Democrats	21%
Not Registered to Vote	21%
Men Less College	21%
News In Last Week - TV	21%
East/Central DMAs	20%
Democratic Women	20%
News Source – Network News	20%

Yes, the respondent has internet access at home.

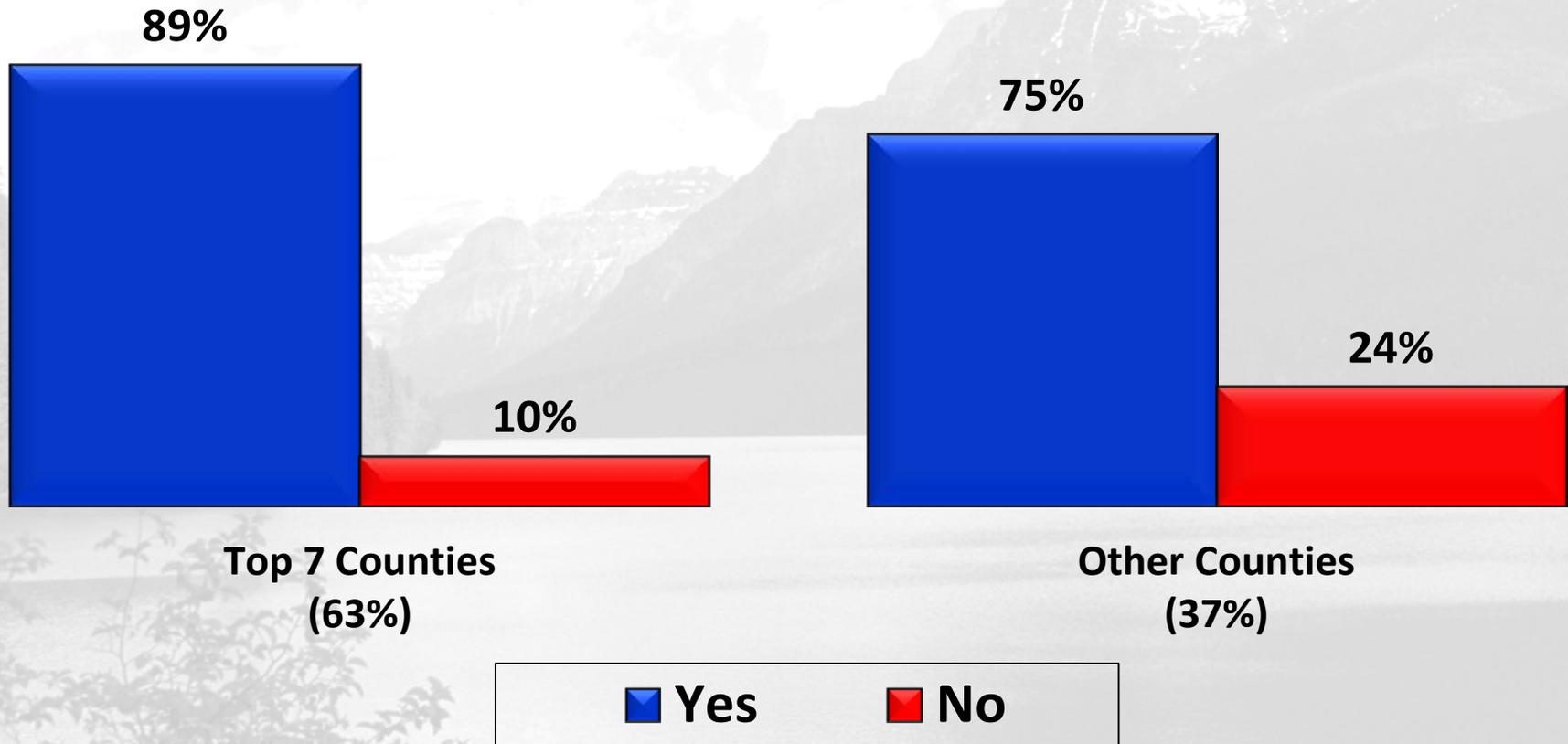
“Do you have internet access at your home?”



Sources: File, Thom and Camille Ryan, “Computer and Internet Use in the United States: 2013,” American Community Survey Reports, ACS-28, U.S. Census Bureau, Washington, DC, 2014, Table 2; and 2015 Greater Montana Foundation Survey.

Access is a somewhat lower in rural communities.

Internet Access at Home by County Type



About half report using the internet on a daily basis.

“On average, which of the following best describes how often you are on the internet?”

	%
Daily	45%
Weekly+	39%
Less Often	4%
Never	12%

As expected, there are significant differences by age.

<i>Time Spent on Internet By Age</i>	Ages 18-34 (29%)	Ages 35-44 (15%)	Ages 45-54 (19%)	Ages 55-64 (19%)	Ages 65+ 20%
Daily	54%	66%	42%	42%	24%
Weekly+	40%	27%	46%	37%	40%
Less Often	2%	-	6%	7%	6%
Never	3%	6%	6%	14%	30%

Montanans with college degrees spend more time online.

<i>Time Spent on Internet By Education</i>	High School or Less (33%)	Some College (32%)	College+ (34%)
Daily	31%	48%	58%
Weekly+	40%	42%	34%
Less Often	6%	2%	3%
Never	22%	8%	5%

Four-in-ten access news online or on a mobile device on a daily basis.

“How often do you get NEWS online or on a mobile device?”

Among All Adults

%

Daily

43%

Weekly+

23%

Less Often

9%

Never

13%

Again, those accessing mobile news tend to be younger adults.

<i>News Online/ On Mobile Device By Age</i>	Ages 18-34 (29%)	Ages 35-44 (15%)	Ages 45-54 (19%)	Ages 55-64 (19%)	Ages 65+ 20%
Daily	58%	54%	45%	29%	26%
Weekly+	26%	27%	26%	26%	12%
Less Often	8%	7%	6%	14%	11%
Never	4%	7%	17%	17%	22%

**Data Shown Among Total Sample*

There are also some differences by income and education.

<i>News Online/ On Mobile Device By Income/Education</i>	Income Under \$50K (38%)	Income Over \$50K (44%)	High School or Less (33%)	Some College (32%)	College+ (34%)
Daily	38%	53%	29%	52%	50%
Weekly+	21%	28%	24%	23%	24%
Less Often	9%	6%	8%	8%	11%
Never	16%	10%	17%	10%	10%

**Data Shown Among Total Sample*

And some differences by county type.

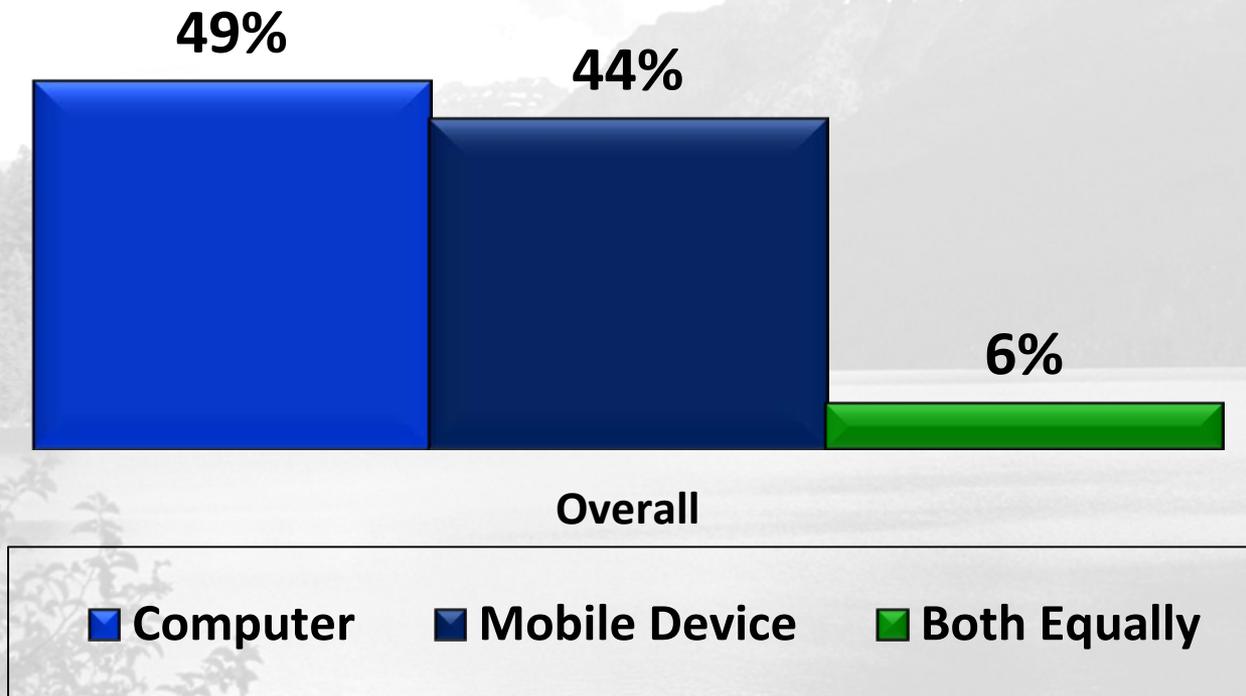
<i>News Online/ On Mobile Device By County Type</i>	Top 7 Counties (63%)	Other Counties (37%)
Daily	46%	38%
Weekly+	25%	22%
Less Often	9%	9%
Never	12%	14%

**Data Shown Among Total Sample*

Respondents split on access via mobile or desktop computer access.

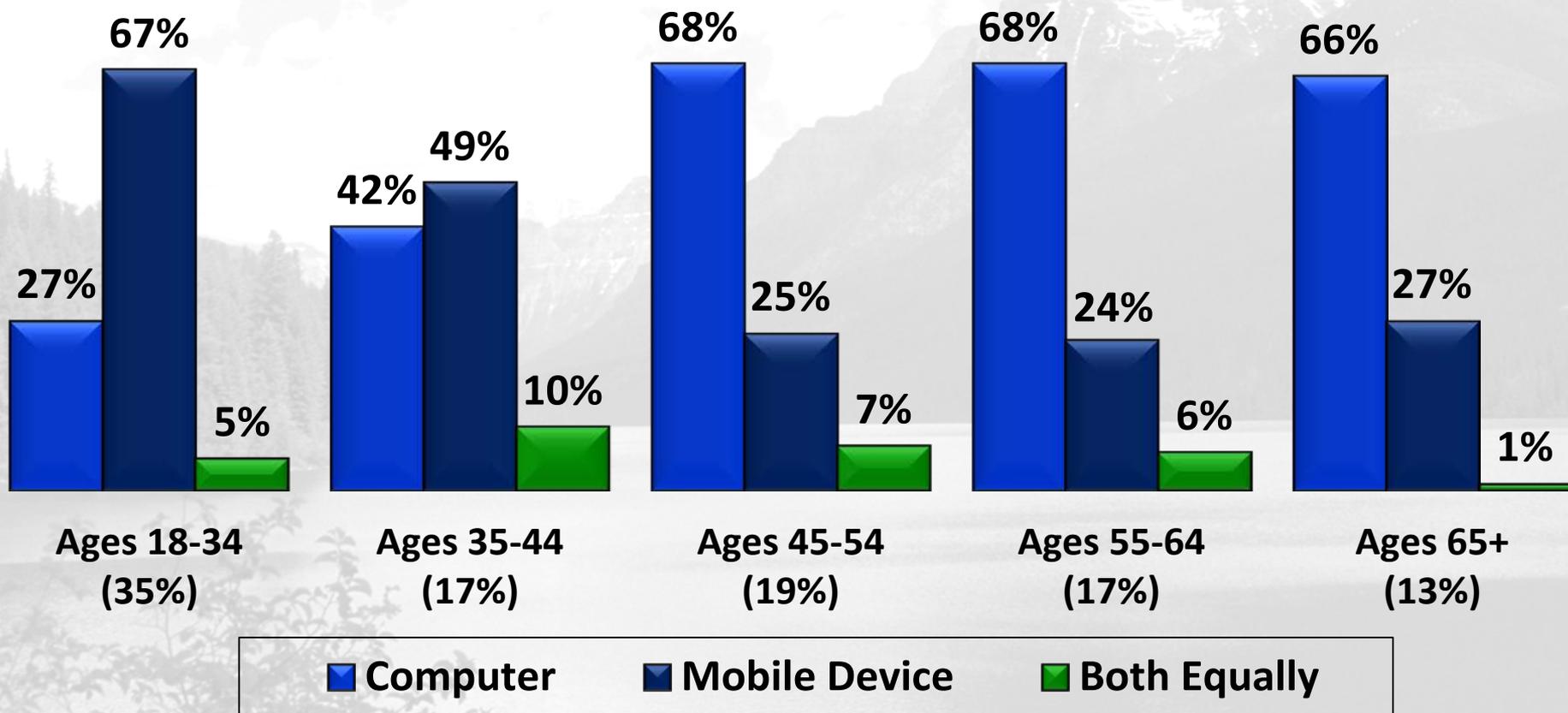
“Do you get more of your online news using a computer or a mobile device?”

Among Adults Who Get News Online or On a Mobile Device (N=398)



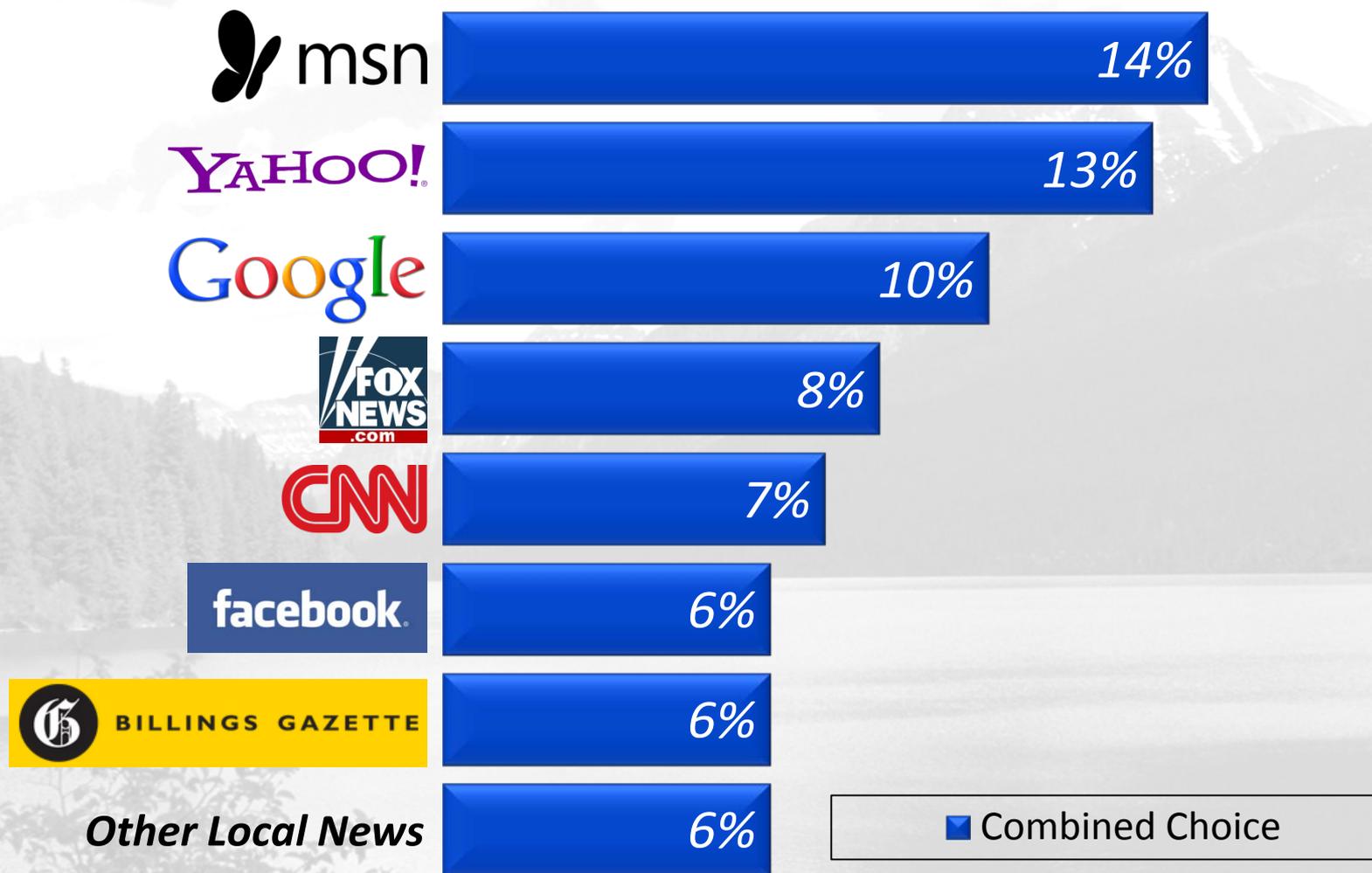
Younger adults tend to use mobile devices, while older respondents prefer computers.

Online News Source by Age Among Adults Who Get News Online or On a Mobile Device



Most Frequently Used Websites for News & Information

“And, what are the one or two websites you use most frequently for news and information?”



Six-in-ten use social media.

“Have you ever created your own profile on any social networking site like Facebook or Twitter or haven’t you done this?”

Yes 62%

No 26%



59%



11%



10%



4%

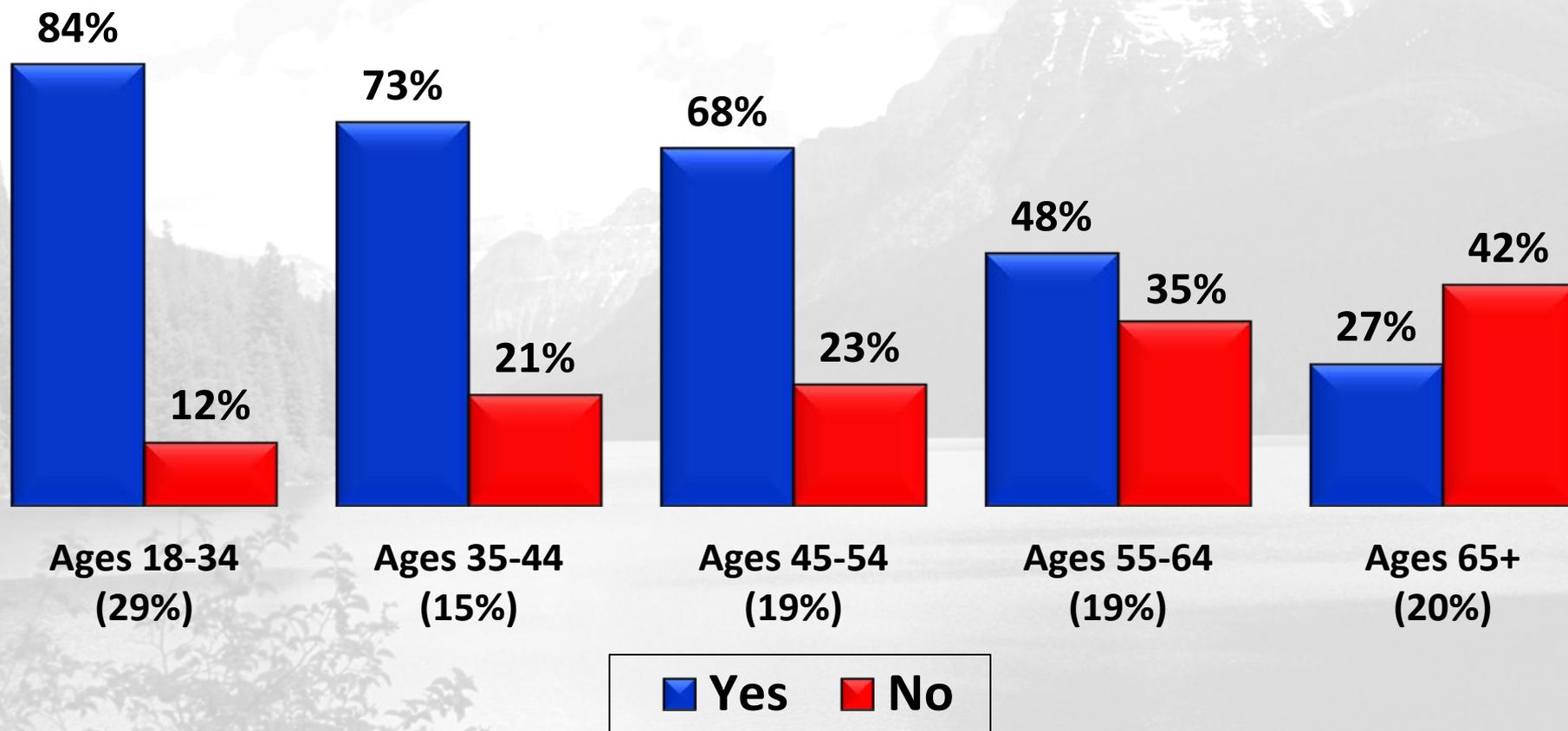


3%

**Data Shown Among Total Sample*

Social media usage is more prevalent among younger age groups.

Created Social Media Profile by Age



Most social media users access their accounts on a daily basis.

“And, how often do you access a social networking site like Facebook or Twitter?”

<i>Among Adults Who Use Social Media</i>	%
Daily	69%
Weekly+	19%
Less Often	12%

Daily users tend to be younger.

Social Media Access by Gender/Age Among Adults Who Use Social Media

	% Daily
Men 18-49 (31%)	76%
Men 50+ (15%)	46%
Women 18-49 (34%)	75%
Women 50+ (19%)	66%

One-in-three Montanans uses social media to access news and information.

“Do you use Facebook, Twitter or other social media site to access news or information?”

Among Total Base

Yes 34%

No 27%



32%



5%

Younger women are particularly reliant on social media for news and information.

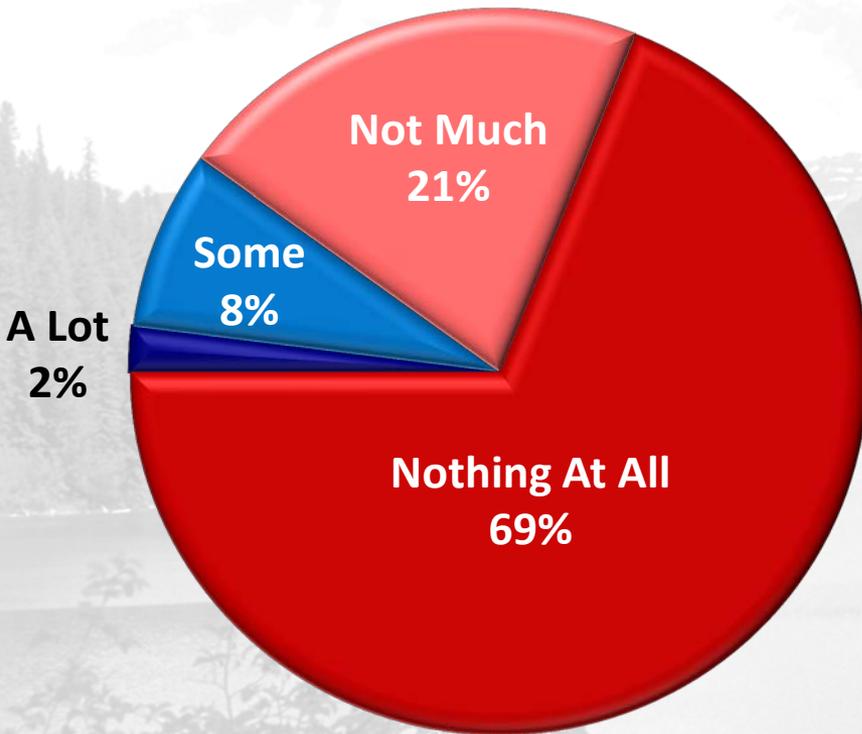
Use Social Media for News by Gender/Age Among Total Base

	% Yes
Men 18-49 (27%)	45%
Men 50+ (23%)	12%
Women 18-49 (25%)	60%
Women 50+ (25%)	18%

Not surprisingly, awareness of the Greater Montana Foundation is lower.

“How much have you seen, read or heard about the Greater Montana Foundation?”

Total A Lot/Some	10%
Total Not Much/Nothing	90%



Top Groups – A Lot/Some (10%)	
News Source – Sunday AM Shows	30%
Follow News Very Closely	23%
Independent Women	21%
Ages 55-64	19%
Women Ages 50+	17%
News Source – Network News	17%
Central Montana	16%
News Source – News Magazines	16%
Billings DMA	15%
Retired	15%
Less Than 1 Hour Watching TV	15%
No Social Media Profile	15%
Base Democrats	14%
Women College+	14%
Urban/Suburban	14%



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