



NEWSPAPER ASSOCIATION OF AMERICA  
Advancing Newspaper Media  
[www.NAA.org](http://www.NAA.org)

Ohio Newspaper Association  
2015 Annual Conference

## Building the Sustainable Business Model - And Benchmarking the Progress



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Today we'll look 2015 Strategies for Building the  
New Business Model with a:

# **Focus on Audience and New Revenue**

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...And measuring our progress.



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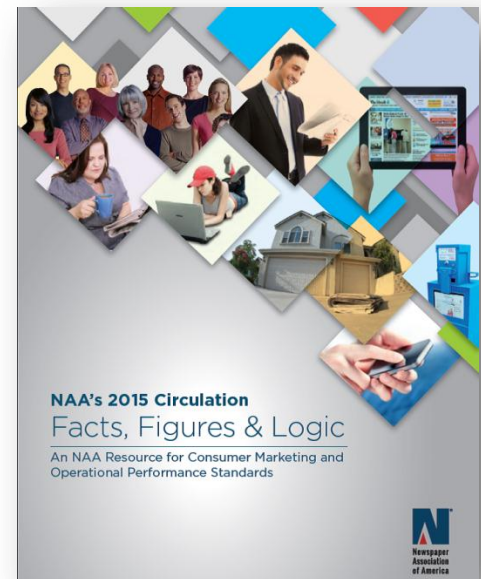
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# What's Working and Benchmarking the Progress...

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- Today's Newspaper Audience - Where the new reader's are
- Operational Efficiencies – NAA's 2015 Circulation Facts, Figures & Logic
- New Revenue: Marketing the Total Access Model
- Marketing to the Occasional Reader
- Telling your newspaper's story
- Strategic Issues in AAM Reporting
- Summary: Identifying the priorities



# Today's Newspaper Audience



# Goin' Mobile

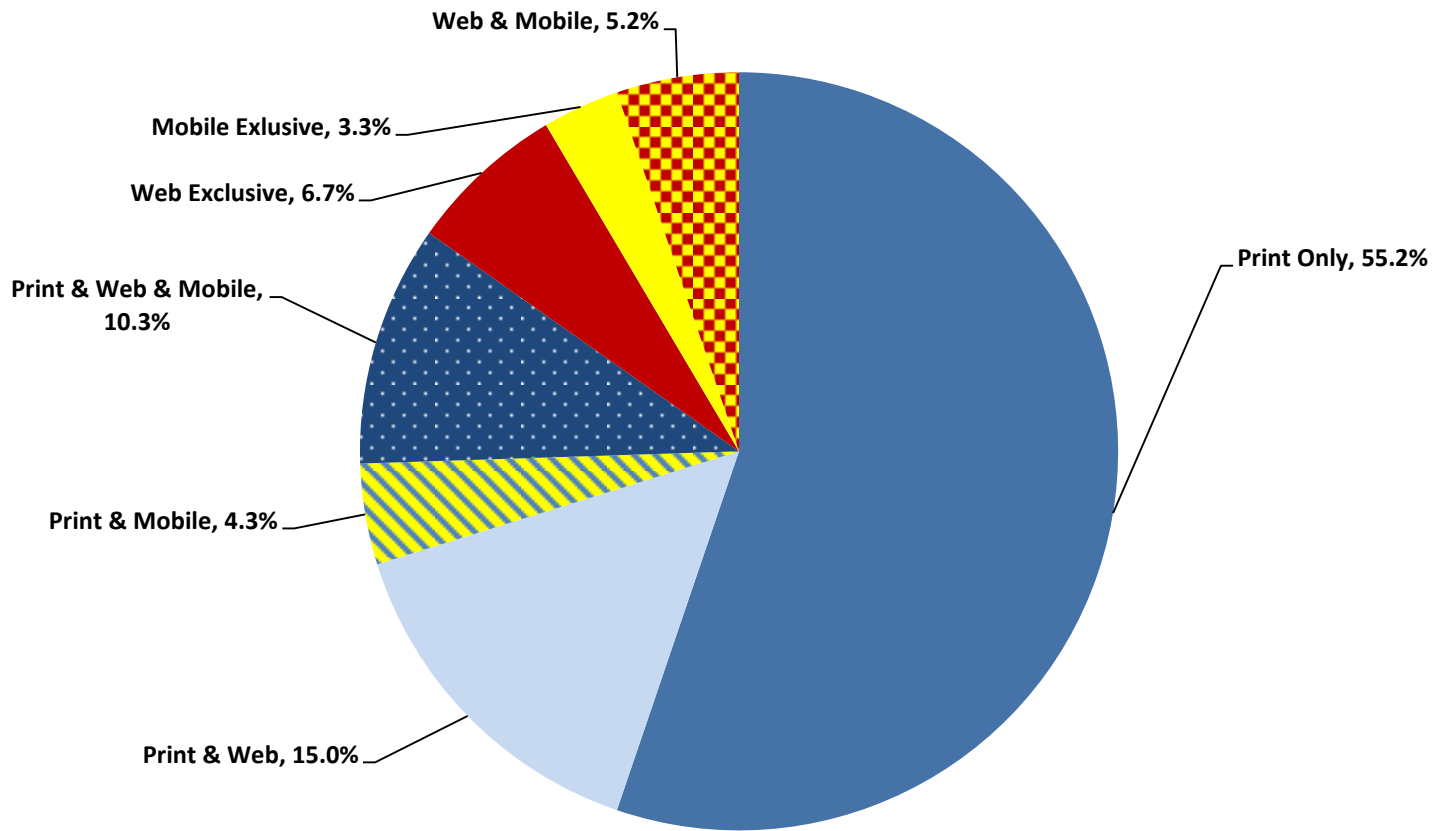


# The Digital Audience



# Opportunities to Engage Readers

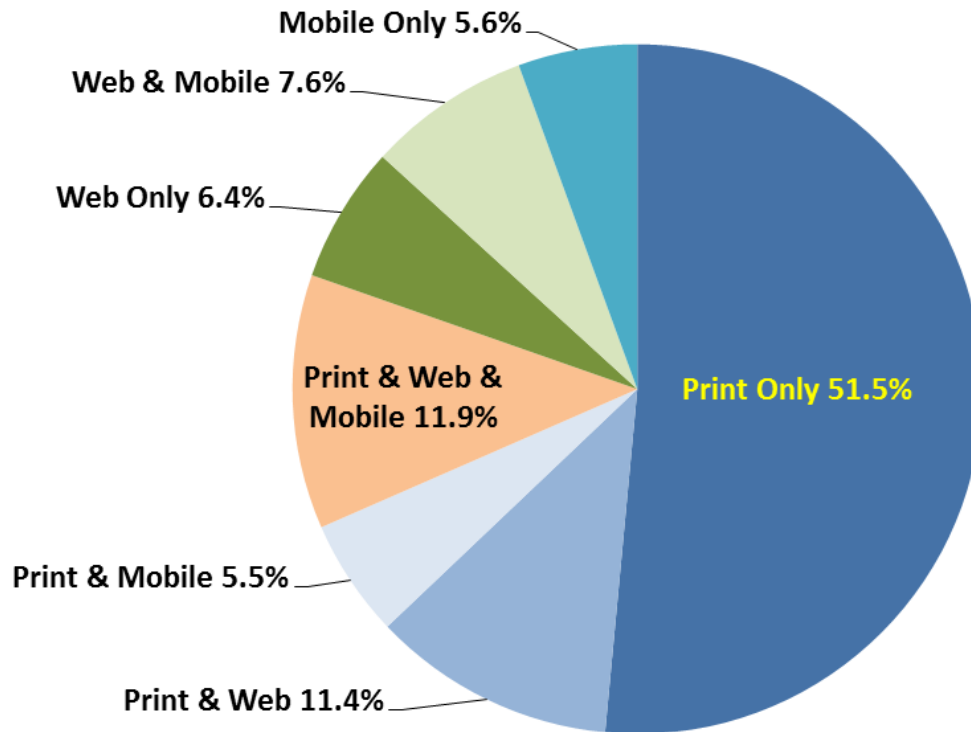
2013 Newspaper Media Audience Composition





# Opportunities to Engage Readers

**Compositon of Newspaper Media Audience by Platform**  
(Past 7 Days)



Source: Nielsen Scarborough, Release 2, 2014

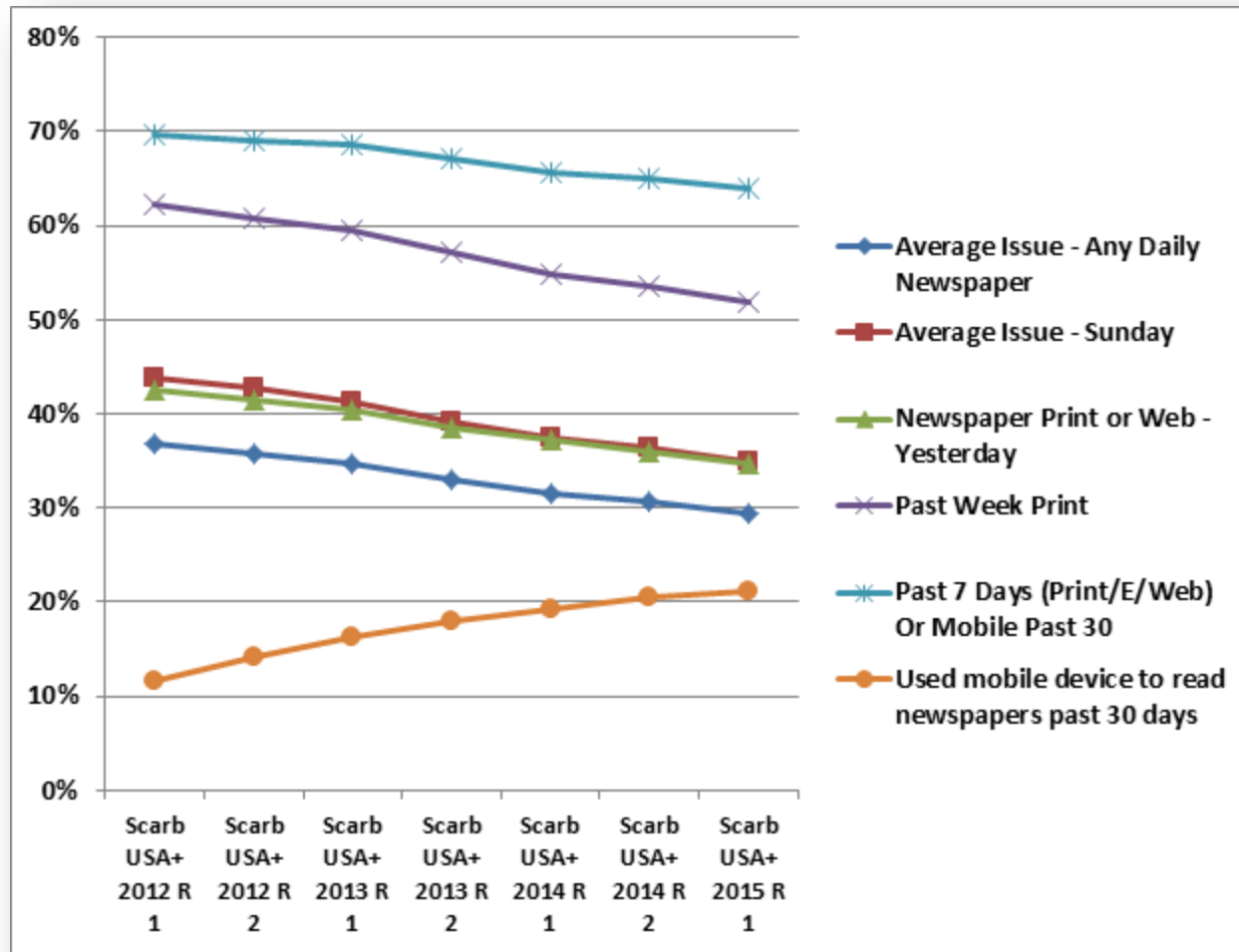


# Opportunities to Engage Readers... And Mobile is the Growth Area.

	Adults	Percent Change R1 2014 vs. R2 2013
<b>Base Total Adult Population</b>	<b>241,532,600</b>	<b>0.6%</b>
Average Issue - Any Daily Newspaper	76,265,120	-3.4%
Any Newspaper Website (non-extendable)	23,706,220	-2.8%
Online Only (Not Print) - Yesterday	13,640,790	-0.6%
Newspaper Print or Web - Yesterday	89,920,700	-2.9%
Average Issue - Sunday	90,681,180	-3.7%
Past Week Print	132,554,200	-3.3%
Any Newspaper Website Past 7 days	43,810,590	-1.9%
Past 7 Days: Print/E-edition/Website	147,600,600	-2.8%
<u>Past Week Plus Mobile 30</u>	<u>158,451,700</u>	<u>-1.6%</u>
Used mobile device to read newspapers past 30 days	46,680,560	8.8%
Any Newspaper Website Past 30 Days	61,179,500	-0.7%



# Opportunities to Engage Readers... And Mobile is the Growth Area.



# Millennials

Nearly 44 million, or 60%, of Millennials engage with newspaper content in either print, on mobile or PC Web



# Boomers

More than 7 out of 10 adults 45-64 engage with newspaper content in either print, on mobile or PC Web



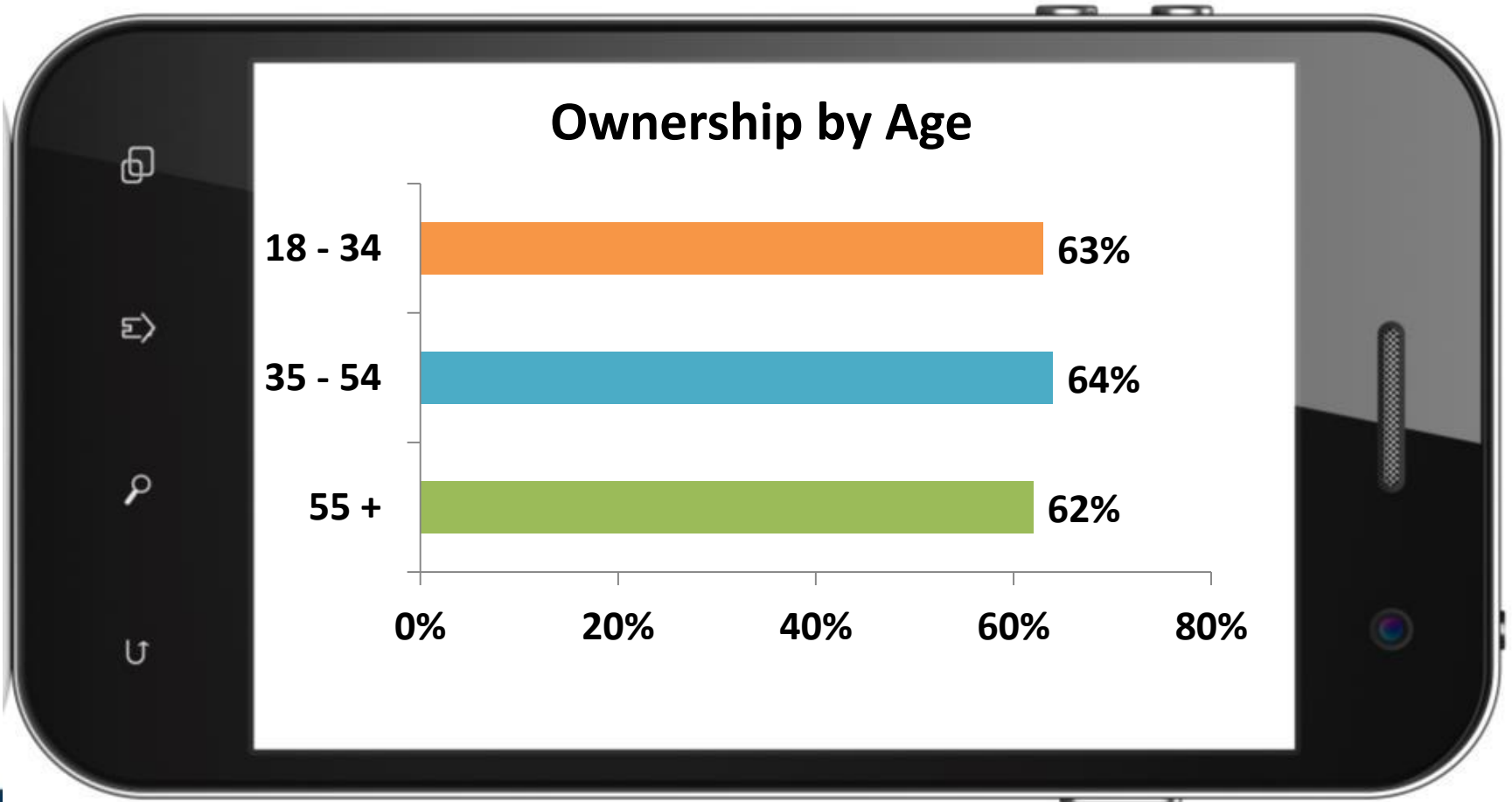
Source: Scarborough, 2013; Adult 18-34 pop 72.5 million

\* Print, Mobile or PC Web newspaper media usage



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# Surge in Smartphones

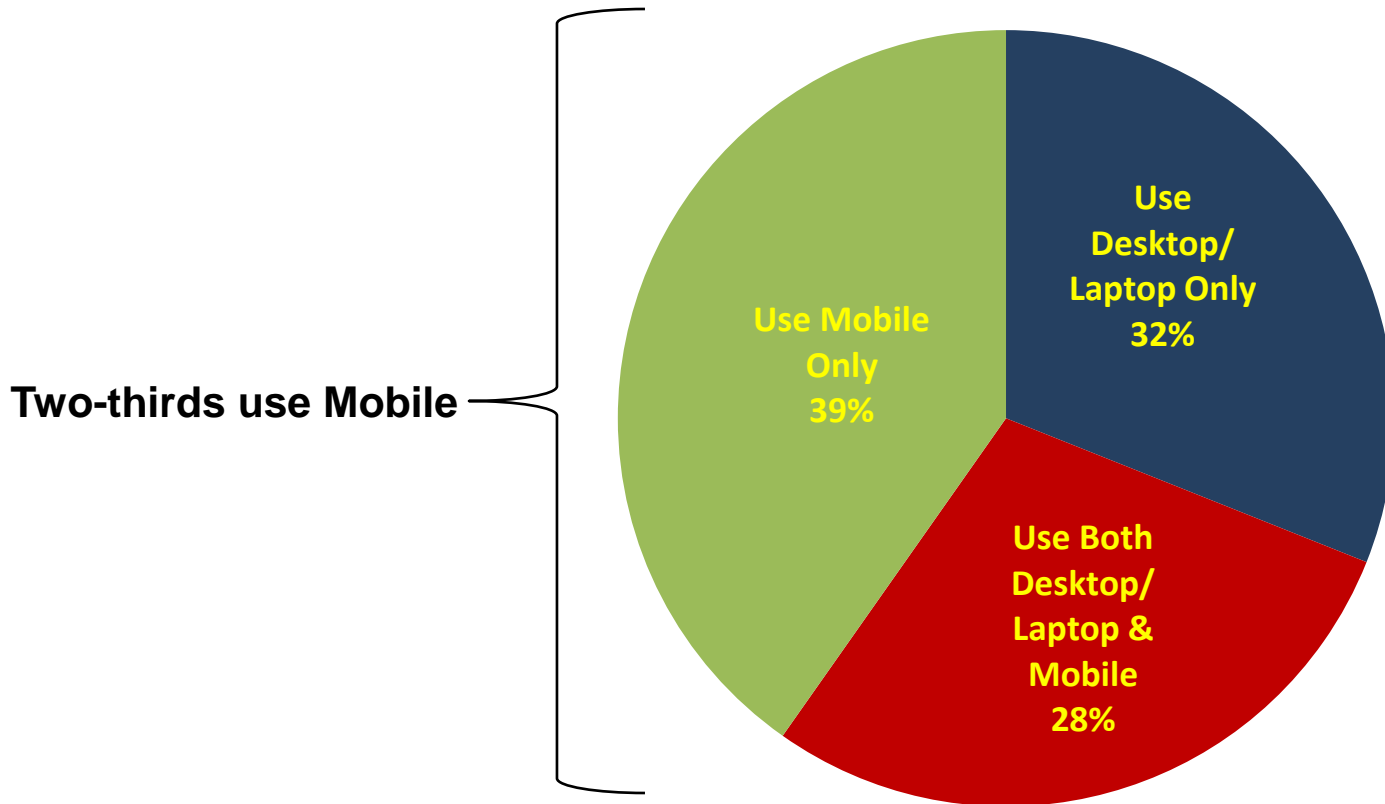


Source: Reynolds Journalism Institute, May 2014



# Digital Audience: 176 Million Unique Visitors

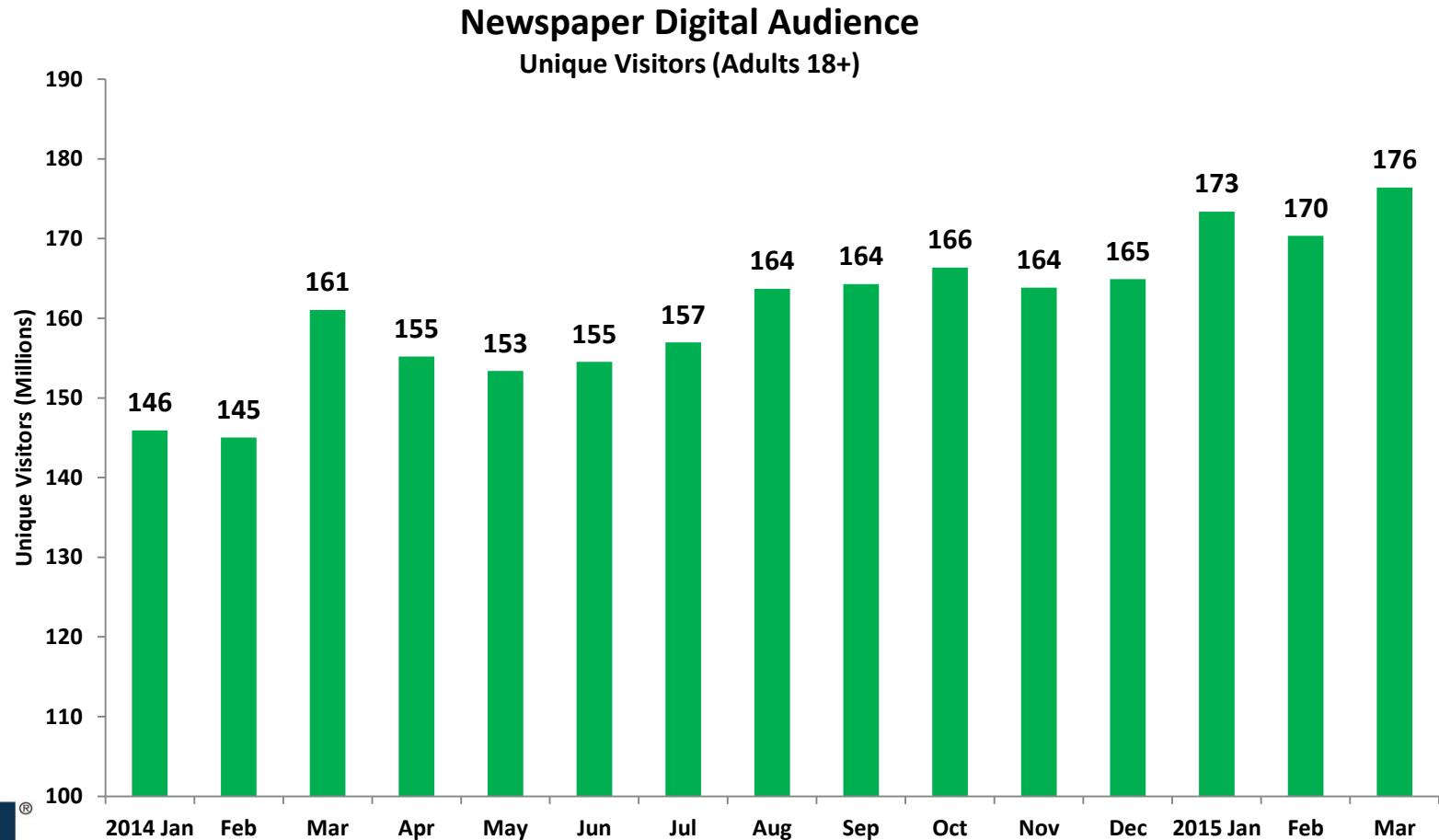
Composition of Newspaper Digital Audience,  
Unique Visitors by Device Type, March 2015



Source: comScore

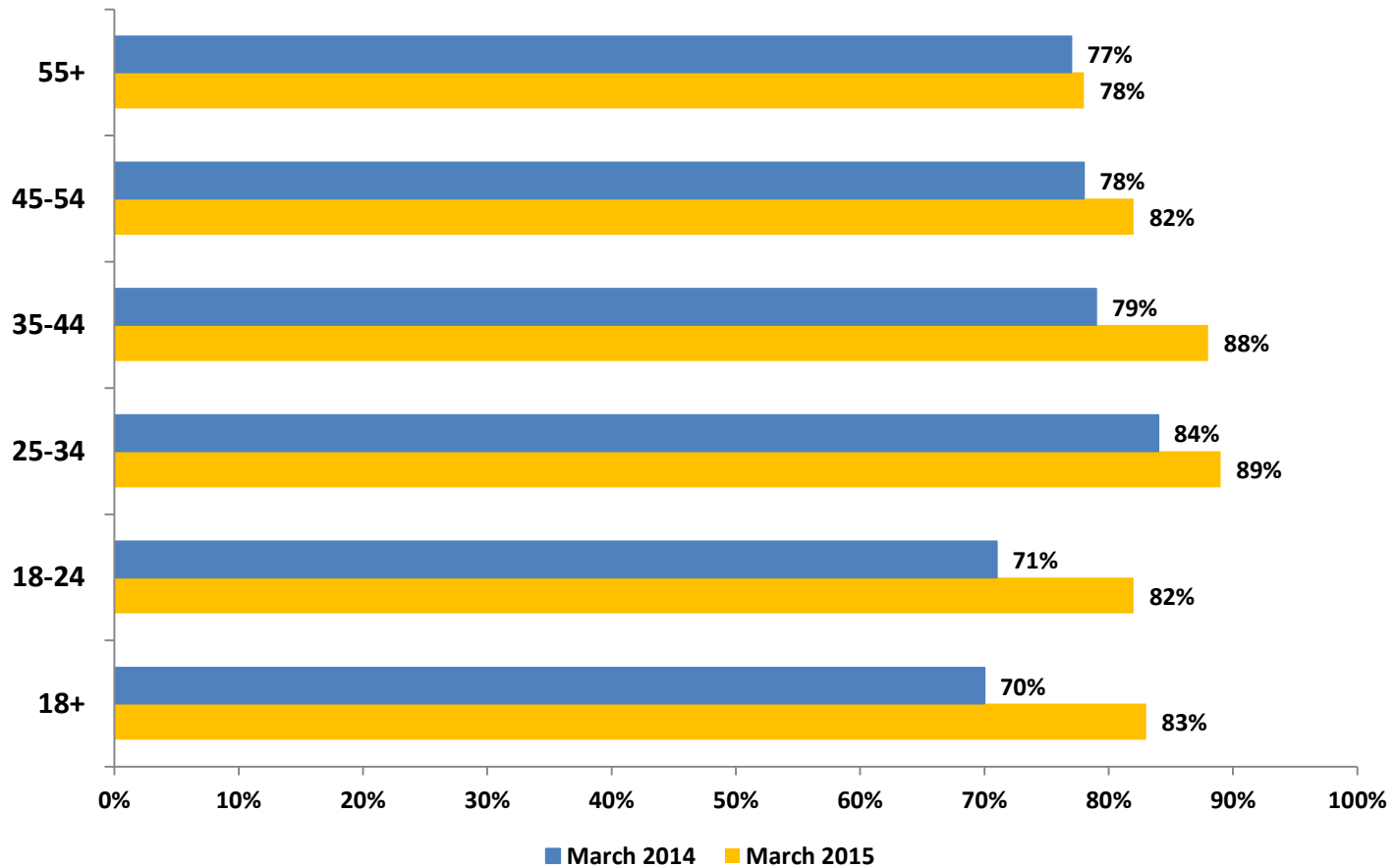


# Newspaper digital media now reaches more than 8 in 10 online adults in the U.S.



# Reach Increased for All Age Groups

Net Reach Among Unique Visitors by Age  
for Newspaper Digital Content



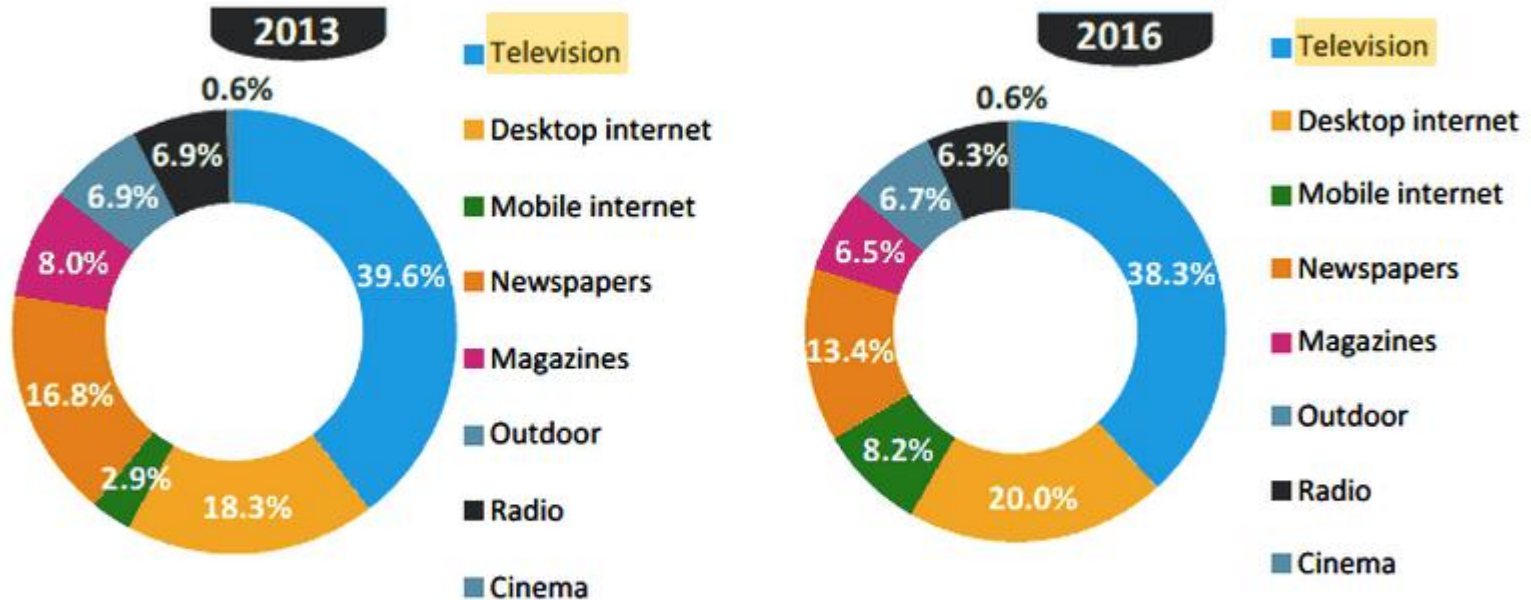
Source: comScore





# Relevance of Mobile Audiences

Share of global adspend by medium (%)



Source: ZenithOptimedia



# Building the Sustainable Business Model

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New Revenue Streams:

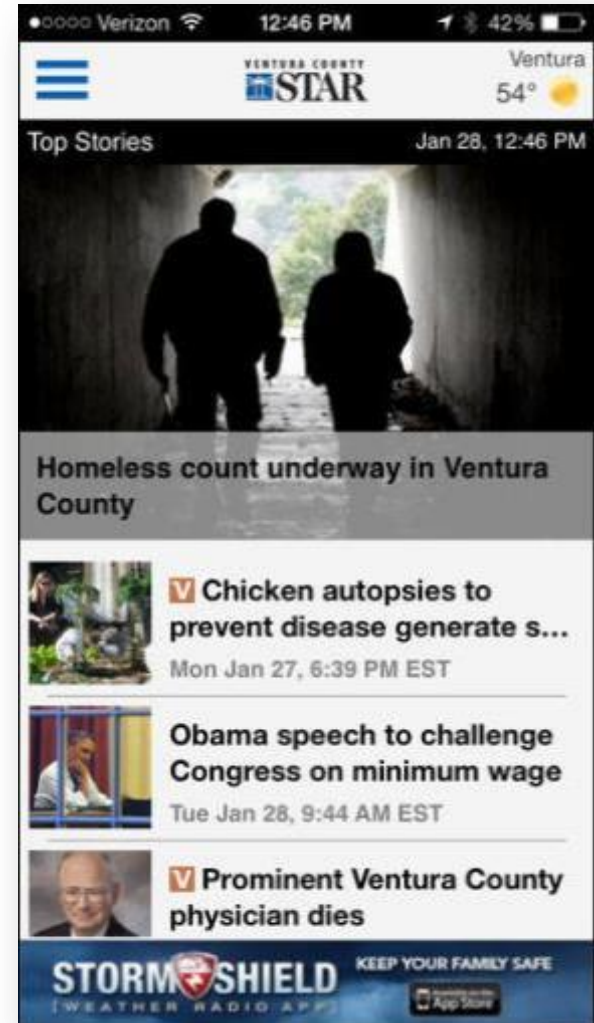
## The Value of Content



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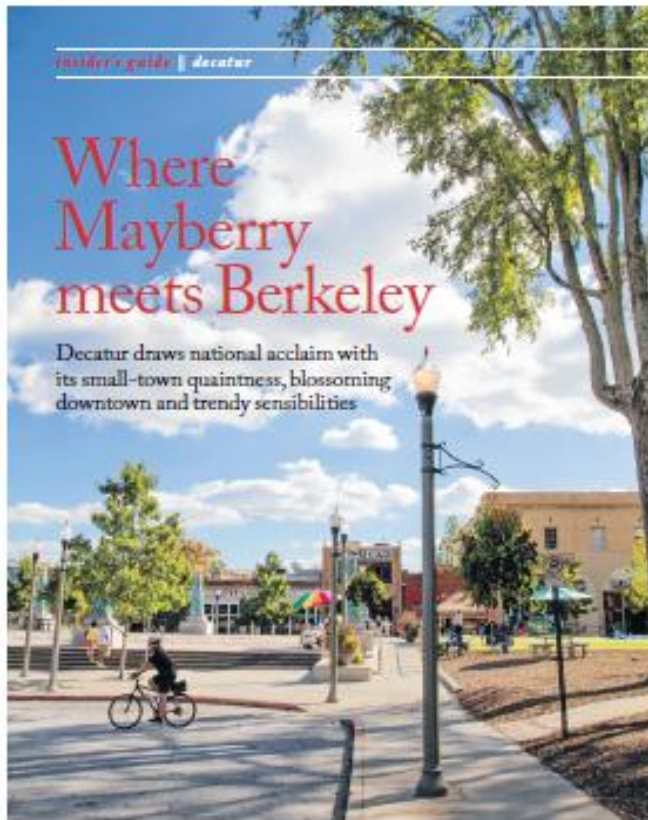
# Marketing Digital Content and the Revenue Possibilities...



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# Marketing Digital Content and the Revenue Possibilities...



Story by JON WATERHOUSE  
Photos by JENNI GUTMAN

**C**hains of shops overflow with creativity and free-spirited style. Boho-casual eateries attract enthusiastic foodies. Pedestrians congregate at a lively downtown square as a convenient MARTA rail line rumbles underneath.

These are just a few of the reasons that Downtown Decatur has attained national popularity. With its fusion of small-town quaintness, intown diversity and college-town cool, it recently received honors from the American Planning Association as a Top 10 Great American Neighborhood.

While its acclaimed school system and blossoming downtown boosted property values, and then helped sustain them during the economic slump, Downtown Decatur's left-of-center brand of food, shopping and entertainment draws visitors from surrounding areas eager to sample its charms.



Left, in many ways highlights Downtown Decatur's small-town quaintness. Right, East Coast Square offers an exciting blend of shops and restaurants for another shopping or people-watching.



Stores, from left, Wild Cat's and Lily Clark's offers clay pots and textiles, while Spanish Boutique features accessories, jewelry and more.

TO SEE MORE OF THIS ARTICLE OR THE FULL PUBLICATION, PLEASE VISIT OUR APP BY CLICKING HERE >>>  
(click on the calendar icon in the top left for 2014 issues)



2015 Circulation Strategies: Building the  
New Business Model

# Making A Difference...

<b>Circulation: Bottom Line Contribution</b>		
	<b>2014</b>	<b>2011</b>
<b>Industry</b>	<b>56.1%</b>	<b>42.6%</b>
25,000 and under	52.5%	52.8%
25,001-50,000	45.8%	46.1%
50,001-100,000	67.1%	56.5%
100,001-200,000	47.3%	31.0%
200,001+	52.1%	48.0%

NAA 2015 Circulation Facts, Figures & Logic



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2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

<b>Trend: Price for One Week of Subscription Package</b>			
Daily and Sunday Package			
Q.35a	2014	2011	2008
<b>Industry</b>	<b>\$5.74</b>	<b>\$4.50</b>	<b>\$3.66</b>
25,000 and under	\$4.63	\$3.83	\$3.14
25,001-50,000	\$5.53	\$4.50	\$3.85
50,001-100,000	\$6.00	\$4.44	\$4.10
100,001-200,000	\$6.65	\$5.11	\$3.94
200,001+	\$6.60	\$5.55	\$4.88

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Improved Revenue: Circulation Pricing Update:

Trend: Price for One Week of Subscription Package				
Daily and Sunday Package				
Q.35a	2014	2011	2008	5 Year % Inc:
<b>Industry</b>	<b>\$5.74</b>	<b>\$4.50</b>	<b>\$3.66</b>	<b>56.8%</b>
25,000 and under	\$4.63	\$3.83	\$3.14	47.5%
25,001-50,000	\$5.53	\$4.50	\$3.85	43.6%
50,001-100,000	\$6.00	\$4.44	\$4.10	46.3%
100,001-200,000	\$6.65	\$5.11	\$3.94	68.8%
200,001+	\$6.60	\$5.55	\$4.88	35.2%

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# What's Working and Benchmarking the Progress...

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# Operational Changes

<b>Q5a. Changes in Distribution Structure</b>		
	<b>2014</b>	<b>2011</b>
Yes, but only in select geographic areas	<b>5%</b>	<b>5%</b>
Yes, changed the distribution structure eliminated district manager positions - now use independent contractors that subcontract with carriers	<b>11%</b>	<b>9%</b>
No, we have retained the structure of the distribution function regardless of whether we have eliminated some positions	<b>84%</b>	<b>86%</b>

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# Operational Changes

<b>Trend: Outsource Any Home Delivery</b>			
	<b>2014</b>	<b>2011</b>	<b>2008</b>
	<b>%</b>	<b>%</b>	<b>%</b>
<b>Industry</b>	<b>27</b>	<b>22</b>	<b>15</b>
25,000 and under	12	11	7
25,001-50,000	28	28	4
50,001-100,000	50	38	27
100,001+	68	60	48

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# Operational Changes

<b>Newspapers that Deliver Other Different Publications</b>			
	Yes, Deliver Other Publications		Number of Different Publications Delivered Daily
Q.13	2014		2014
	%		#
<b>Industry</b>	<b>43</b>		<b>4</b>
25,000 and under	27		2
25,001-50,000	48		4
50,001-100,000	68		3
100,001-200,000	93		10
200,001+	78		7

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# Operational Changes

How Customer Service Function Is Performed		
	2014 Industry %	2008 Industry%
In House	61	68
Regional Call Center	27	13
Outside Contractor	22	9

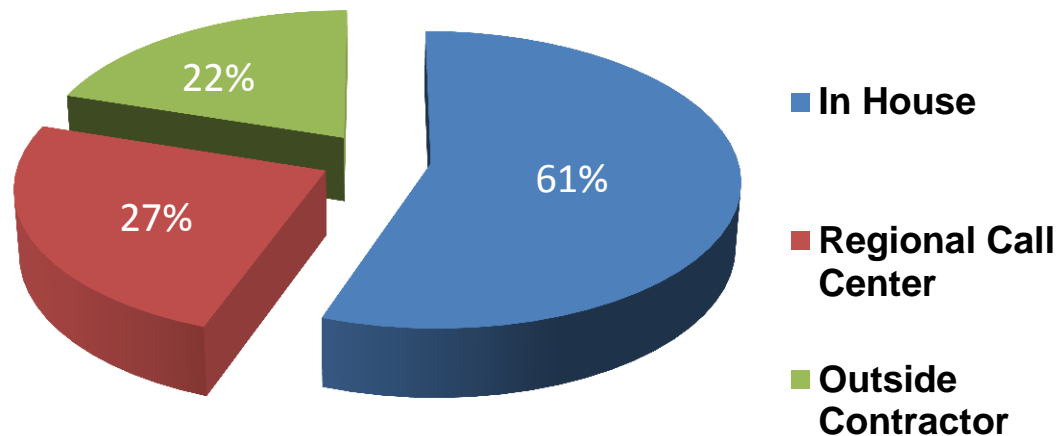
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2015 Circulation Strategies: Building the  
New Business Model

# Operational Changes

## How Customer Service Function is Performed...



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# What's Working and Benchmarking the Progress...

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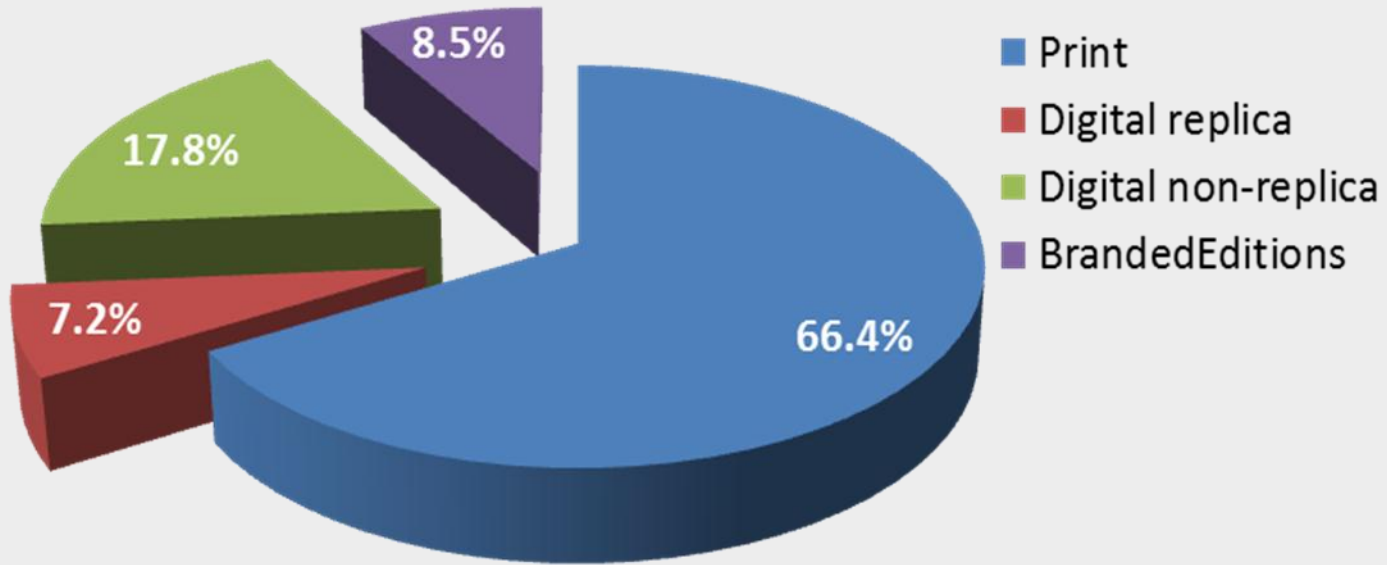


# New Revenue Streams: The Value of Content



# Two thirds of total daily circulation is traditional print

## Weekday Circulation by Publishing Platform





# Marketing Digital Content and the Revenue Possibilities...

Tablet interstitial and mobile banner

Billboard

Austin360 launch email

300x250 Digital display ad

Austin360 full-page ad

Slide 1 Slide 2 Slide 3 Slide 4 Slide 5

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# Marketing Home Delivery

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Charge Nonsubscribers for Digital Access to the Newspaper's Website		
Q.33	2014	2011
	%	%
<b>Industry</b>	<b>75</b>	<b>27</b>
25,000 and under	76	28
25,001-50,000	84	25
50,001-100,000	63	19
100,001-200,000	69	20
200,001+	75	40

NAA 2015 Circulation Facts, Figures & Logic



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New Business Model

# Marketing Home Delivery

Percentage of Paid Starts That Are:			
Q.16*	Print Exclusively	Digital Exclusively	Print + Digital
	%	%	%
<b>Industry</b>	<b>37</b>	<b>5</b>	<b>58</b>
25,000 and under	48	4	48
25,001-50,000	18	6	76
50,001-100,000	30	9	61
100,001-200,000	22	5	73
200,001+	15	14	71

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# Marketing Home Delivery

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Median number of digital-only subscribers	
Q.28b	# 2014
<b>Industry</b>	<b>587</b>
25,000 and under	219
25,001-50,000	1,402
50,001-100,000	1,878
100,001-200,000	4,021
200,001+	10,202

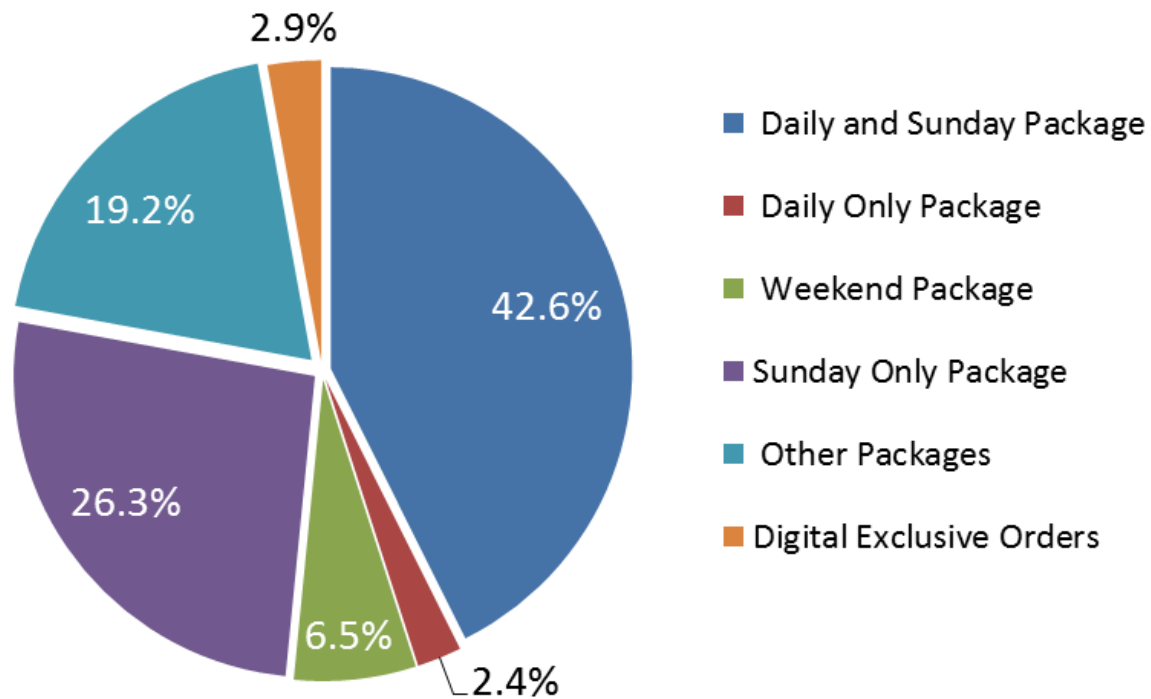
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# Marketing Home Delivery

Type and Frequency of Subscriptions Sold



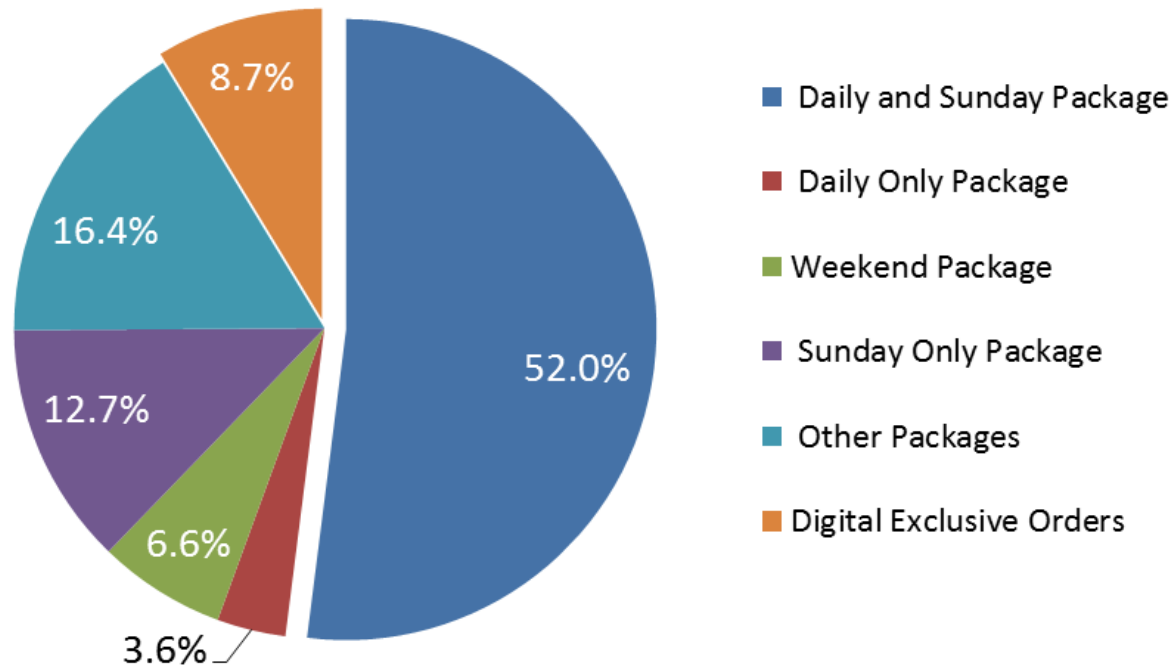
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# Marketing Home Delivery

Voluntary Starts by Type and Frequency



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# Marketing Home Delivery and Maximizing Revenue

<b>Trend: Offer Discounts for Long-Term Advance Payment</b>			
Q.29a	<b>2014</b>	<b>2011</b>	<b>2008</b>
% Yes	%	%	%
<b>Industry</b>	<b>53</b>	<b>58</b>	<b>59</b>
25,000 and under	62	66	60
25,001-50,000	63	52	58
50,001-100,000	35	44	62
100,001-200,000	29	38	51
200,001+	38	30	57

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2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery and Maximizing Revenue

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<b>Trend: Offer Lower Subscription Rate for Easy Payment Plan</b>			
Q.30	2014	2011	2008
% Yes	%		%
<b>Industry</b>	<b>59</b>	<b>74</b>	<b>92</b>
25,000 and under	78	83	88
25,001-50,000	58	76	96
50,001-100,000	35	74	96
100,001-200,000	29	33	97
200,001+	13	20	100

NAA 2015 Circulation Facts, Figures & Logic





2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery and Maximizing Revenue

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Do you credit for vacation stops?			
2014 Q.48.	Yes %	No %	
<b>Industry</b>	<b>59</b>	<b>41</b>	
25,000 and under	73	27	
25,001-50,000	63	37	
50,001-100,000	41	59	
100,001-200,000	15	85	
200,001+	50	50	

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2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Percentage of Subscribers Paying By....					
	Credit Cards	Recurring Bank Debit	Recurring Credit Cards	Internet Transactions	Bill by e-mail
	2014	2014	2014	2014	2014
Q.31	%	%	%	%	%
<b>Industry</b>	<b>25</b>	<b>10</b>	<b>19</b>	<b>4</b>	<b>3</b>
25,000 and under	23	10	14	4	3
25,001-50,000	25	17	24	3	1
50,001-100,000	29	7	22	5	4
100,001-200,000	31	9	34	9	1
200,001+	28	1	30	2	16

NAA 2015 Circulation Facts, Figures & Logic



# Marketing Home Delivery

Total Subscribers on Recurring Payment Plans: 35%

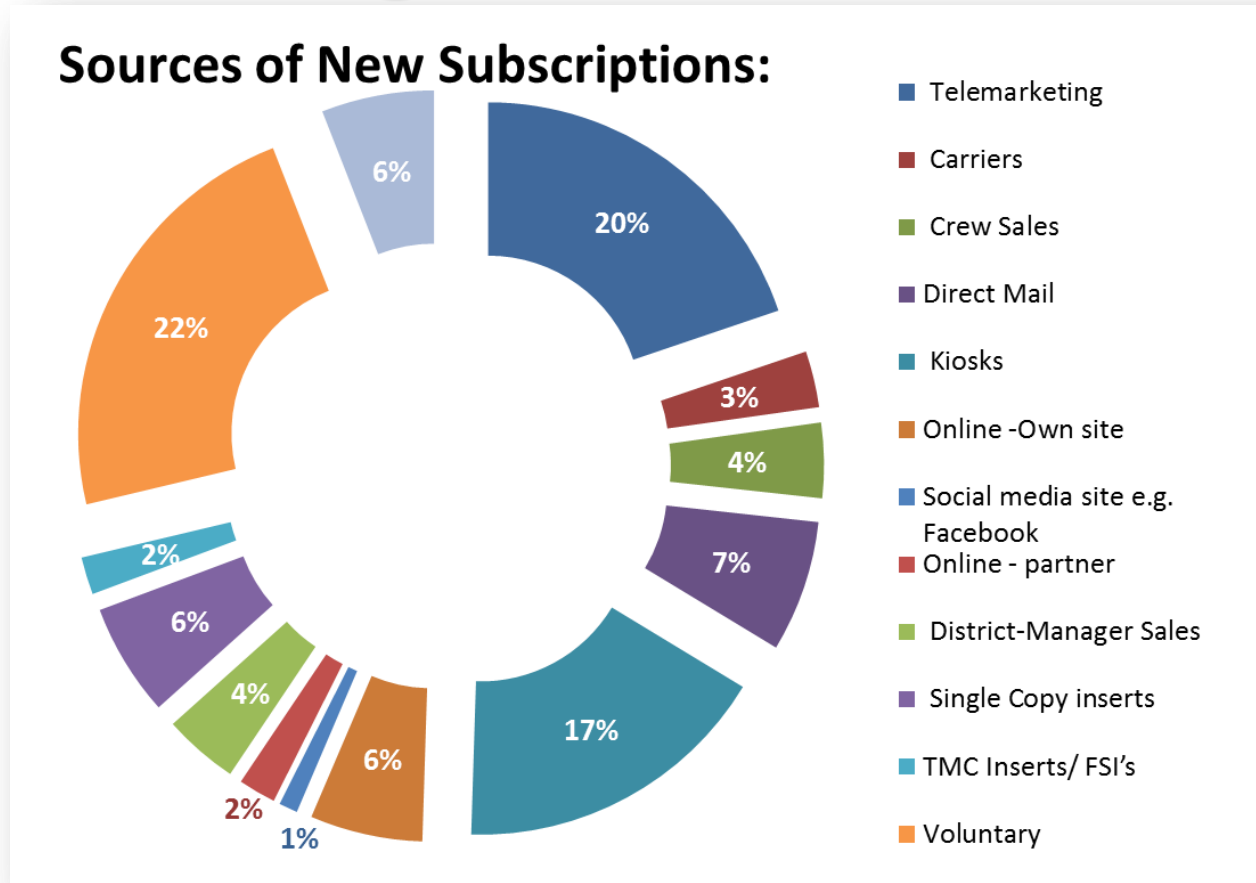
	Credit Cards	Recurring Bank Debit	Recurring Credit Cards	Internet Transactions	Bill by e-mail
	2014	2014	2014	2014	2014
Q.31	%	%	%	%	%
<b>Industry</b>	<b>25</b>	<b>10</b>	<b>19</b>	<b>4</b>	<b>3</b>
25,000 and under	23	10	14	4	3
25,001-50,000	25	17	24	3	1
50,001-100,000	29	7	22	5	4
100,001-200,000	31	9	34	9	1
200,001+	28	1	30	2	16

NAA 2015 Circulation Facts, Figures & Logic



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# Marketing Home Delivery



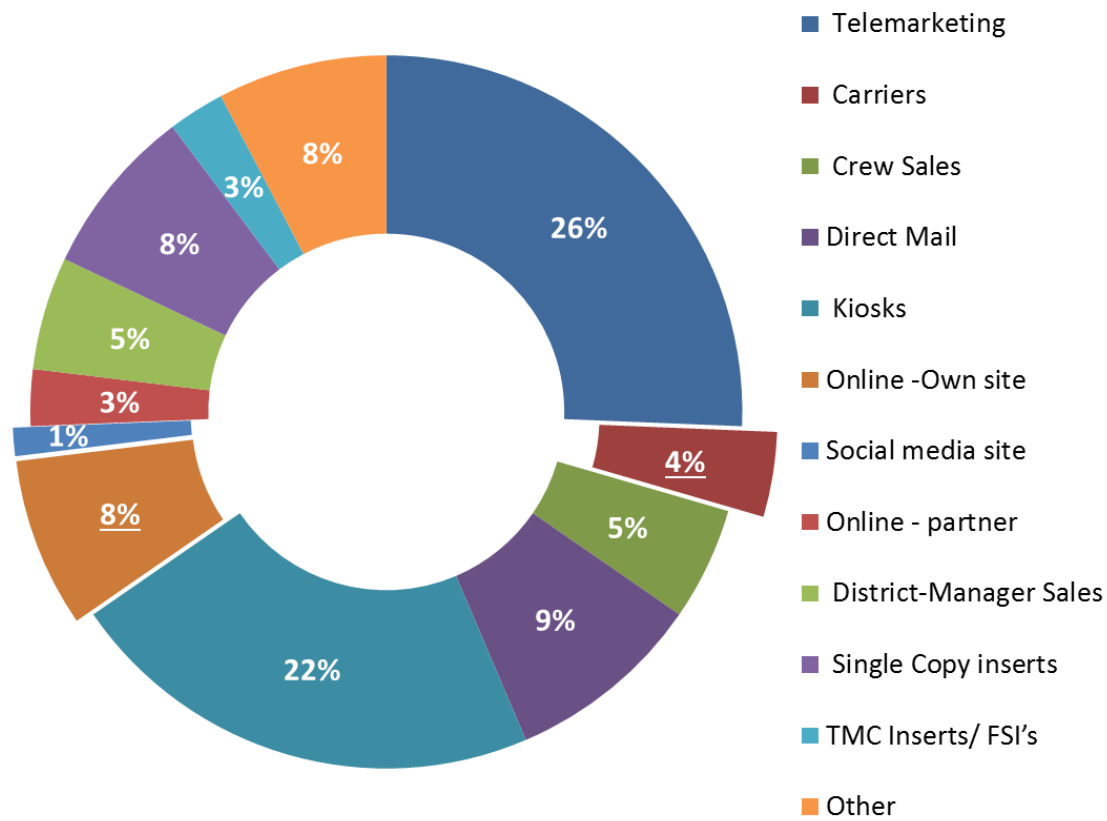
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2015 Circulation Strategies: Building the New Business Model

# Marketing Home Delivery

Subscription Sales Sources:



NAA 2015 Circulation Facts, Figures & Logic



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# Marketing Home Delivery

Percent of Annual Digital Sales Sold By...	
Q.19	%
a. Telemarketing	3
b. Carriers	*
c. Crew Sales	*
d. Direct Mail	2
e. Kiosks	2
f. Internet (Net)*	19
-Own site	51
-Social media site e.g. Facebook	3
-Internet partner	2
h. District-Manager Sales	1
Single copy/TMC Inserts/FSIs	*
i. Single Copy & TMC Inserts/ FSI's	1
j. Voluntary	25
k. Other	8

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2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

<b>Have Customer Loyalty/Value-Added or Frequent Reader Program</b>		
Q.20	2014	2011
	%	%
<b>Industry</b>	<b>29</b>	<b>23</b>
25,000 and under	16	15
25,001-50,000	40	25
50,001-100,000	35	26
100,001-200,000	57	67
200,001+	67	50



# Loyalty Club - BeeBuzzPoints

- Open Access
- Points based program
- Enter to win contests, auctions, prizes
- Interact at events

The screenshot shows the BeeBuzzPoints website for The Sacramento Bee. The header features the logo and navigation links like 'Get Points' and 'Win Prizes'. A central banner promotes joining the loyalty club for free and winning prizes, with icons for Feedback, Games, Contests, Read & Win, and Trivia. A 'Congratulations Giants!' banner offers a free cheer card. Another banner for 'Audience Appreciation Month' (October 2014) includes a 'Click Here!' link. A bottom banner for Disney offers 500 bonus points. The browser's address bar shows 'buzzpoints.sacbee.com' and the system tray at the bottom indicates the date is 10/31/2014.





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2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Retention Rates by Sales Source			
Q.24	2014	2014	2014
	13 Weeks %	26 Weeks %	52 Weeks %
a. Telemarketing	60	45	34
b. Carriers	82	65	53
c. Crew Sales	63	33	24
d. Direct Mail	76	64	53
e. Kiosks	65	46	34
Internet (Net)*	78	67	54
f. Own internet site	78	67	54
g. Internet partner	84	67	54
h. Internet social media site	67	62	54
h. District-Manager Sales	72	57	48
j. Single Copy inserts	76	65	51
k. TMC inserts/FSIs	76	64	52
L. Voluntary**	76	67	56

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

<b>Trend: Permanent Stops In Past 12 Months Daily and Sunday Package</b>			
Q.18	2014	2011	2008
	#	#	#
<b>Industry</b>	<b>6,300</b>	<b>5,859</b>	<b>7,000</b>
25,000 and under	2,660	3,103	2,965
25,001-50,000	8,435	9,057	8,347
50,001-100,000	12,677	17,889	17,950
100,001-200,000	28,800	31,806	35,095
200,001+	49,760	61,000	69,611

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Trend: How Subscription Sales Effort is Transacted								
	Credit/Debt		Cash		No Payment			
Q.26	2014	2008		2014	2008		2014	2008
	%	%		%	%		%	%
<b>Industry</b>	<b>46</b>	<b>38</b>		<b>38</b>	<b>34</b>		<b>15</b>	<b>28</b>
25,000 and under	<b>39</b>	36		<b>48</b>	40		<b>14</b>	24
25,001-50,000	<b>52</b>	38		<b>26</b>	33		<b>14</b>	29
50,001-100,000	<b>50</b>	42		<b>24</b>	28		<b>21</b>	30
100,001-200,000	<b>59</b>	39		<b>22</b>	23		<b>11</b>	39
200,001+	<b>67</b>	42		<b>36</b>	18		<b>7</b>	40

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# Marketing Home Delivery

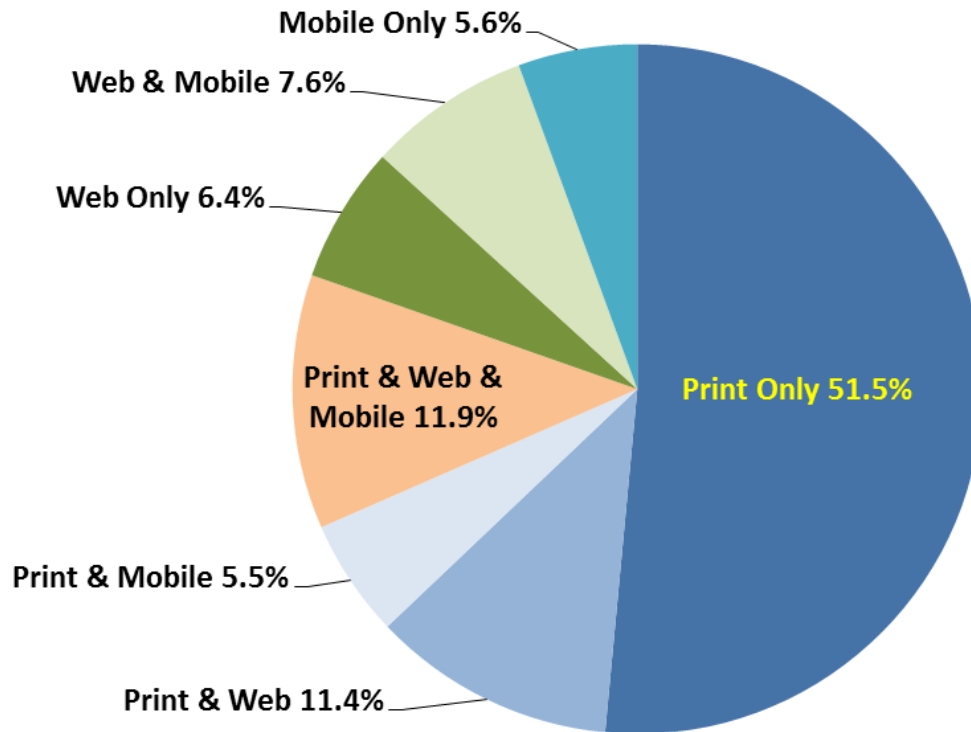
Home Delivery Subscriber Churn Rates			
	%	%	%
	Daily	Saturday	Sunday
<b>Industry</b>	<b>33</b>	<b>38</b>	<b>40</b>
25,000 and under	38	44	41
25,001-50,000	33	35	37
50,001-100,000	42	41	47
100,001-200,000	33	37	46
200,001+	26	41	34

NAA 2015 Circulation Facts, Figures & Logic



# Opportunities to Engage Readers

**Compositon of Newspaper Media Audience by Platform**  
(Past 7 Days)



Source: Nielsen Scarborough, Release 2, 2014



2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Median percentage of eligible subscriber base that has activated			
Q.28a	2014	%	
<b>Industry</b>		<b>25</b>	
25,000 and under		21	
25,001-50,000		25	
50,001-100,000		24	
100,001-200,000		29	
200,001+		61	

NAA 2015 Circulation Facts, Figures & Logic





2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Median percentage of subscribers who have accessed their digital replica edition			
Q.28e	2014	%	
<b>Industry</b>		<b>26</b>	
25,000 and under		23	
25,001-50,000		78	
50,001-100,000		17	
100,001-200,000		50	
200,001+		23	

NAA 2015 Circulation Facts, Figures & Logic



# Building the Sustainable Business Model

---

New Revenue Streams:

The Value of Content



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# Marketing Digital Content and the Revenue Possibilities...

---

## Get Digital Access



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# Marketing Digital Content and the Revenue Possibilities...

---

Marketing Digital is really three related objectives and sales strategies:

1. Sell complete print/digital bundled subscriptions
2. Drive current print subscribers to activate:
  - I. The Value Statement
  - II. Engagement = Retention
  - III. Measurable and reportable
3. Sell digital subscriptions for profit and reach.

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- **GET IN THE HOLIDAY SPIRIT** with the daily and Sunday Denver Post. Every day, The Post, in print and online, keeps you up to date on holiday events, happenings and entertainment ideas.

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# The Marketing Plan Starts with the Strength of the Brand and the Audience




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**Charge my credit card:**  American Express®  Discover® Card  MasterCard®  Visa®

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

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# Most Digital Only Sales Are Made when “hitting the wall”.

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# Driving Registration & Adoption

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Monday, May 5, 2014

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BeeBuzzPoints (loyalty site)	Mobile website	BeeBuzzPoints (loyalty site)	
	BeeBuzzPoints (loyalty site)		
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<b>INCLUDED</b> <i>for current print subscribers</i>	<input type="button" value="join now"/>	<input type="button" value="join now"/>	<input type="button" value="join now"/>
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- Engagement = Print Retention
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- Engagement = Increased Traffic
- Engagement = Value and Revenue
- Engagement = Building the Brand



# Driving Registration & Adoption

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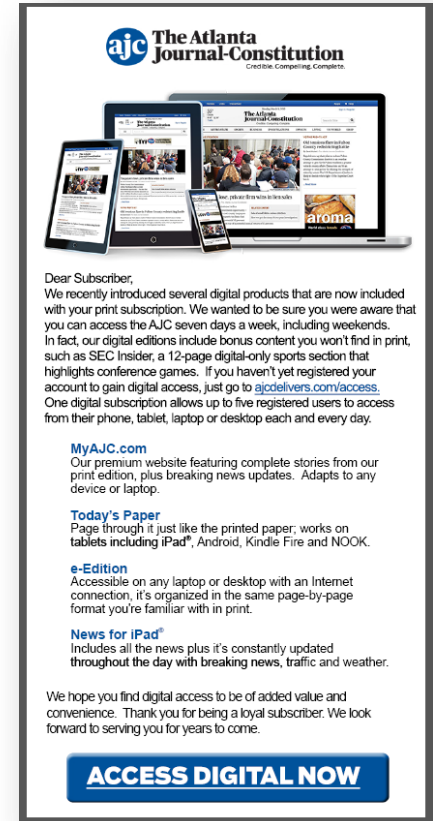
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The Palm Beach Post  
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## RESPONSE RATE

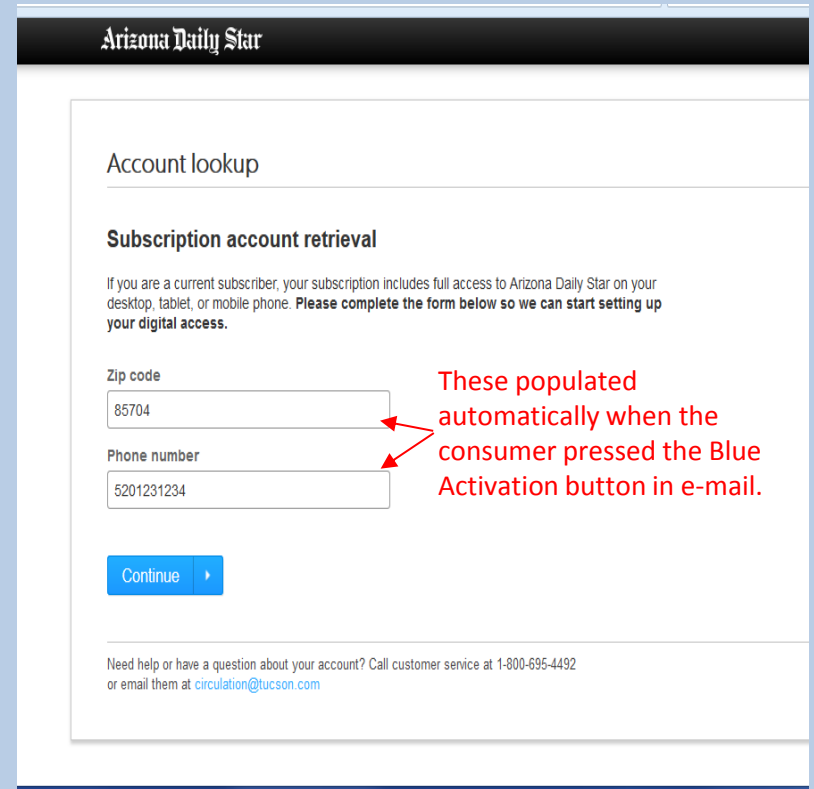
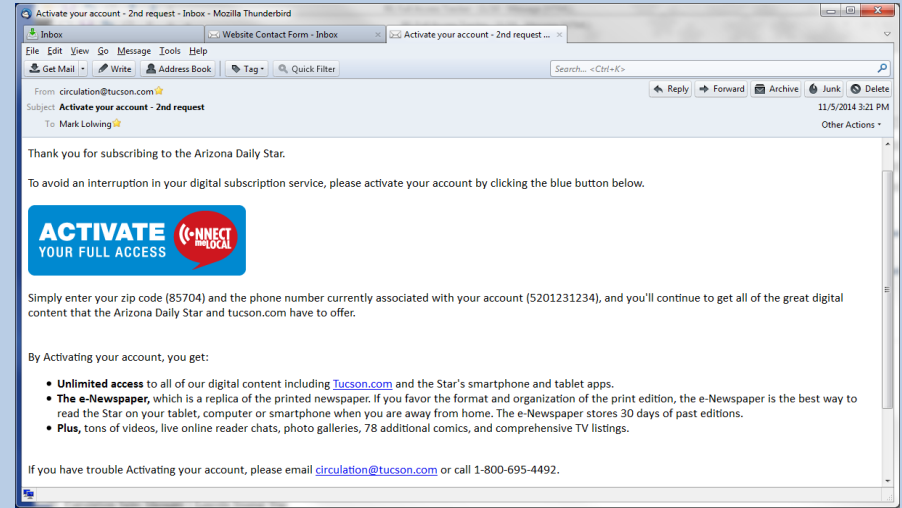
### Arizona Daily Star DAILY & SUNDAY CIRCULATION 78,313 / 107,109

### SALES SOURCE(S) eMail

### TARGET AUDIENCE Current print subscribers who had not yet activated their digital account



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**243**  
**ORDERS**

**1.4 %**  
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**SALES SOURCE**

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# THE TENNESSEAN

1300  
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92,000 daily/150,000 Sunday

SALES SOURCE

Consumer Events/Engagement

TARGET AUDIENCE

Consumer engagement events are chosen to align with key audience groups



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# What's Working and Benchmarking the Progress...

---

- Today's Newspaper Audience - Where the new reader's are
- Operational Efficiencies
- New Revenue: Marketing the Total Access Model
- **Marketing to the Occasional Reader**
- Telling your newspaper's story
- Strategic Issues in AAM Reporting
- Identifying the priorities



Single Copy Sales:

# **Building Audience & Revenue**



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2015 Circulation Strategies: Building the  
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# The Challenge of building audience & revenue

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# The Print Audience



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# Critical Role for Print Remains Apparent

## THE WALL STREET JOURNAL.

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<http://www.wsj.com/articles/retailers-cant-shake-the-circular-habit-1426113760>

BUSINESS

## Retailers Can't Shake the Circular Habit

Inserts in newspapers draw more shoppers than digital ads, but cost a lot more



In 2014, circulars generated an estimated \$5.84 billion in revenue for newspapers, down 6.9% from \$6.27 billion the prior year, according to one market researcher. PHOTO: ANDREW HARRER/BLOOMBERG NEWS



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# 70% Of Consumers Still Look To Traditional Paper-Based Coupons For Savings

posted: 4/17/2015

Seventy percent of consumer packaged goods coupon users still use print-based coupons such as those in free standing inserts (FSI) typically found in Sunday papers to find savings (1) according to a study that will be presented by GfK Custom Research and News America Marketing at the Association of Coupon Professionals' 10th annual Industry Coupon Conference on Thursday, April 16 in San Antonio.

The new study reveals surprising statistics about consumer coupon usage including that traditional FSI coupons are redeemed at a rate eight times that of digital coupons (2), and that among heavy CPG coupon users, those using paper coupons spend 8% more annually than their digital counterparts (3).

"While consumers continue to adopt digital savings tools, this study reaffirms the value of the traditional print FSI," said Mark Peiser, VP, Marketing Research, News America Marketing. "When you look at the numbers, you can see that print coupon redemption rates still dominate consumer savings."

So, too millennial coupon users are looking to the FSI – with 63% of this age group using traditional print coupons. (1)

The presentation is based on a series of studies conducted throughout 2014 and analyzed and compiled at the beginning of this year. It's unique in that it focused only on Consumer Packaged Goods coupon users, not the larger universe of clothing, home store, or other types of retail shoppers.

"The data we collected shows that while digital coupons are an important saving tool, traditional paper coupons are still a predominant player in the world of savings," said Neal Heffernan, SVP, Shopper & Retail Strategy, GfK Custom Research.



# Daily & Sunday Retail Pricing Trends:



Single Copy Retail Prices			
Weekday Single Copy Rate	No. of Newspapers	Sunday Single Copy Rate	No. of Newspapers
\$2.50	1	\$6.00	1
\$2.00	3	\$3.50	2
\$1.50	16	\$3.00	17
\$1.25	6	\$2.99	1
\$1.00	262	\$2.75	1
\$0.94	1	\$2.50	36
\$0.80	1	\$2.25	5
\$0.75	213	\$2.10	1
\$0.60	2	\$2.00	207
\$0.50	87	\$1.99	1
\$0.25	1	\$1.75	32
		\$1.59	1
<b>Total</b>	<b>593</b>	\$1.50	141
		\$1.25	40
		\$1.00	25
		\$0.75	4
		\$0.50	2
		<b>Total</b>	<b>517</b>





# Retailing the Newspaper

<b>Trend: Prices Offered by Newspaper Weekday Single Copy</b>			
	2014	2011	2008
Q.36a			
<b>Industry</b>	<b>\$1.00</b>	<b>\$0.75</b>	<b>\$0.50</b>
25,000 and under	\$0.75	\$0.75	\$0.50
25,001-50,000	\$1.00	\$0.75	\$0.75
50,001-100,000	\$1.00	\$0.75	\$0.50
100,001-200,000	\$1.00	\$1.00	\$0.75
200,001+	\$1.25	\$1.00	\$0.75

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

<b>Trend: Prices Offered by Newspaper Sunday Single Copy</b>			
	2014	2011	2008
Q.36d	\$	\$	\$
<b>Industry</b>	<b>\$2.00</b>	<b>\$1.50</b>	<b>\$1.50</b>
25,000 and under	\$1.63	\$1.50	\$1.25
25,001-50,000	\$2.00	\$1.75	\$1.50
50,001-100,000	\$2.00	\$2.00	\$1.50
100,001-200,000	\$2.00	\$2.00	\$1.50
200,001+	\$2.50	\$2.00	\$1.75

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

<b>Trend: Charge Premium On Holiday</b>				
	<b>Thanksgiving</b>			<b>Other Holiday</b>
Q.36e	<b>2014</b>	<b>2011</b>	<b>2008</b>	<b>2014</b>
	%	%	%	%
<b>Industry</b>	<b>92</b>	<b>64</b>	<b>35</b>	<b>5</b>
25,000 and under	91	55	16	5
25,001-50,000	90	87	51	5
50,001-100,000	94	79	66	6
100,001-200,000	100	91	60	-
200,001+	88	70	54	13

NAA 2015 Circulation Facts, Figures & Logic



# Atlanta: AJC Early Edition Thanksgiving Day Newspaper Sold 44K Copies

- For years, we faced a dilemma: The Thanksgiving Day newspaper is our largest of the year. Yet, some local supermarkets are closed on Thanksgiving.
- The answer: Deliver an early edition of our Thanksgiving Day paper to our top six single copy outlets by noon on Wednesday, Nov. 26.
- For supermarkets, the Wednesday before Thanksgiving is the busiest shopping day of the year. This means for the first time, our biggest newspaper was in front of their biggest crowds.
- Working hand-in-hand with the newsroom, we produced a newspaper that contained updated stories and a complete Thanksgiving Day insert package.
- AJC sold 44,000 editions of the early Thanksgiving Day edition – contributing to an 5% single-copy increase year-over-year.



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Filename: AJ-MAIN-AJCD1126-Extra Date/Time created: Nov 26 2014 12:32:18.540AM Username: SPEEDORIVER07  
Cyan Magenta Yellow Black 1A X Wednesday, Nov 26, 2014 MAIN 1A

Our biggest paper of the year is stuffed with savings

## Happy Thanksgiving

**The Atlanta Journal-Constitution**  
Credible. Compelling. Complete.

**THURSDAY EARLY EDITION**

**NOV. 27, 2014**

**There are 60+ inserts to prepare for Thanksgiving & Black Friday shopping!**

**CYBER MONDAY DIGITAL EXTRA**

Out of Ideas? Gifts for everyone on your list are just a click away. Make the most of your subscription with our guide to holiday shopping and deals, exclusively on the AJC ePaper.

**AJC ePaper**

**Bulldogs & Yellow Jackets**

Bonus posters and a preview of Saturday's game between UGA and Georgia Tech.

**\*SPORTS, D6-D9**

**Jim Brickman for Christmas**

The pianist-composer talks about his eighth holiday album and his career.

**\*LIVING, F1**

**Your holiday movie guide**

**BONUS SPECIAL SECTION** delves into 'Hunger Games,' 'Penguins of Madagascar,' 'Horrible Bosses 2,' 'Hobbit,' two films about ALS, award-season releases and more. **B1 PLUS: GO TO MYA.AJC.COM/GOGUIDE FOR 'MOCKINGJAY' LANDMARKS IN GEORGIA**

**THE GIFT OF KINDNESS**

Katherine Ramsey, who cannot work because of epilepsy and other health issues, decided to sell cookies to earn money to pay for her son Noah's 10th birthday party this year. When her condition forced her to curtail her bake sale, donors made contributions and Noah was able to have his birthday party. [www.ajc.com](http://www.ajc.com)

### A FAMILY'S LASTING THANKFULNESS

**B**ecause of kindnesses from people they may never meet, life has changed for the Ramsey family. When Noah Ramsey turned 10 in August, he got a birthday party – his first. When the weather turned cold this fall, new clothes kept Noah warm. As many Americans give thanks today, this Marietta child's family, too, is grateful. And the kind strangers? They were just happy to help.

**READ OUR REPORT IN LIVING, PAGE F1**

There is nothing worse than being a parent and have your child wish for something that you just cannot give them. We were so glad to see Noah's wish for a party come true.

— Nancy Cohen, Sandy Springs donor

**IN YOUR SCHOOLS, A9**  
**School lunches improving**  
Stricter Georgia standards boost health.

**NATION & WORLD, A6-A7**  
**Questions remain in Ferguson**  
Atlanta responds with mostly peaceful protests.

**METRO AIRPORT GUIDE, C7**  
**Hartsfield-Jackson: How to get around**  
Everything you need to know about navigating the world's busiest airport.

Classified: F2 Editorial: D3 Television: F2  
Features: F1  
©2014 A.J.C. VOL. 86, NO. 339  
PRINTED WITH 100% RECYCLED PAPER

Magenta Yellow Black 1A X  
Filename: AJ-MAIN-AJCD1126-Extra Date/Time created: Nov 26 2014 12:32:18.540AM Username: SPEEDORIVER07

**+12.4%**

**SINGLE COPY UNITS**

**+20.9%**

**REVENUE INCREASE**

The Times Media Co

DAILY & SUNDAY CIRCULATION  
77,300/85,400

SALES SOURCE(S)  
Single Copy Retail Locations

TARGET AUDIENCE  
Single Copy Customers



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Advancing Newspaper Media

Thanksgiving Day Exclusive

ENTER TO WIN  
**\$5,000 THANKS GIVEAWAY**

Purchase your Thanksgiving Paper  
on **Wednesday** at our Single Copy Locations!

Details revealed only in Thanksgiving Day edition of the Times

THE TIMES | nwi.com  
MEDIA COMPANY

print :: digital :: social



**CPO: \$0.00**

# Single Copy Snapshot

---

- Price increases clearly correlate with the losses. Newspapers that increased the weekday price increase since July 2013:
  - 79 percent posted sales declines greater than 5 percent while only 58 percent of newspapers that did not increase the price in the last year reported that level of losses.
  - Among the newspapers that increased the price, 21 percent, had losses of 20 percent or more, almost three times as many as the newspapers that did not price since July 2013.
  - Newspaper priced at \$1.00 also reported larger losses than newspapers below that price point.



# Single Copy Snapshot

---

- ✓ Two of three newspapers reported single copy sales are 15% or less of total daily circulation.
- ✓ Fifty-Five percent of the respondent newspapers reported Sunday single copy sales are 20 percent or less of total Sunday circulation.
- ✓ 72% reported that “convenience stores” was the inside retail sales category that has performed best for your daily newspaper this year. On Sunday 51.9 % reported convenience stores and 33.9% responded that grocery/supermarket was their best category.
- ✓ More than seven of ten newspapers reported adding inside locations or being flat with last year.
- ✓ Two of three newspapers responded that their newspaper reduced the number of rack locations.
- ✓ 55.9 %, “welcome more accounts to be converted to a scan-based accounting system” and 55.3 % reported more than 25% of their sales are now scan based. In response to the question on SBT losses, 63.4 percent reported losses of 10% or less.



# Single Copy Snapshot

---

- ✓ Walmart is an important location. Nine of ten respondents reported their newspaper is available for sale inside all the Wal-Mart stores in their market.
- ✓ 68.5% reported having two or locations inside the store
- ✓ 25% of the newspapers reported selling more than 20 copies daily.
- ✓ More than half reported selling more than 40 copies per location on Sunday.



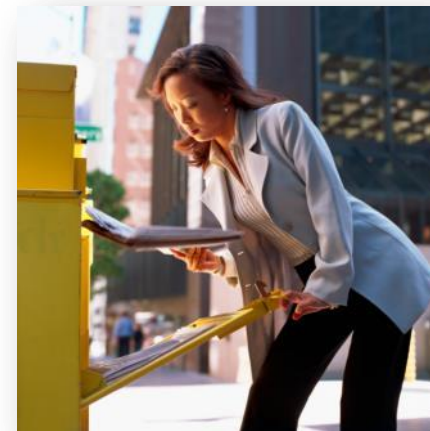


2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

**Trend: Median Number of Coin Operated Newsrack Locations for Daily Newspaper**

	2014	2011	2008
Q.40	#	#	#
<b>Industry</b>	<b>128</b>	<b>150</b>	<b>210</b>
25,000 and under	70	74	84
25,001-50,000	150	254	266
50,001-100,000	318	495	663
100,001-200,000	420	1,030	1,197
200,001+	772	2,075	3,038



**Trend: Median Number of Coin Operated Newsrack Locations for Sunday Newspaper**

	2014	2011	2008
Q.40	#	#	#
<b>Industry</b>	<b>123</b>	<b>146</b>	<b>220</b>
25,000 and under	61	77	90
25,001-50,000	150	230	270
50,001-100,000	320	438	555
100,001-200,000	259	944	937
200,001+	671	1,087	1,991



2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Trend: Median Number of Retail/Over the Counter Locations for Daily Newspaper				
	2014		2011	2008
Q.40	#	#	#	#
<b>Industry</b>	<b>250</b>	<b>165</b>	<b>205</b>	<b>205</b>
25,000 and under	124	90	80	80
25,001-50,000	412	393	261	261
50,001-100,000	585	701	480	480
100,001-200,000	1,340	1,366	1,135	1,135
200,001+	2,301	3,000	2,500	2,500



Trend: Median Number of Retail/Over the Counter Locations for Sunday Newspaper				
	2014		2011	2008
Q.40	#	#	#	#
<b>Industry</b>	<b>265</b>	<b>172</b>	<b>225</b>	<b>225</b>
25,000 and under	128	96	80	80
25,001-50,000	409	381	253	253
50,001-100,000	577	667	503	503
100,001-200,000	1,469	1,509	1,076	1,076
200,001+	2,382	3,322	2,428	2,428



# Retailing the Newspaper

<b>Trend: Mean percentage of Daily Single Copy Sales Sold OTC Retail Locations</b>			
Q.39	2014	2011	2008
	%	%	%
<b>Industry</b>	<b>79</b>	<b>69</b>	<b>62</b>
25,000 and under	73	67	59
25,001-50,000	88	75	68
50,001-100,000	84	72	63
100,001-200,000	84	71	69
200,001+	85	74	65

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

<b>Trend: Mean percentage of Sunday Single Copy Sales Sold OTC Retail Locations</b>			
Q.39b	2014	2011	2008
	%	%	%
<b>Industry</b>	<b>80</b>	<b>74</b>	<b>71</b>
25,000 and under	69	69	64
25,001-50,000	92	83	74
50,001-100,000	88	78	73
100,001-200,000	92	83	78
200,001+	93	85	82

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2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

<b>Trend: Charge Premium On Holiday</b>				
	<b>Thanksgiving</b>			<b>Other Holiday</b>
Q.36e	<b>2014</b>	<b>2011</b>	<b>2008</b>	<b>2014</b>
	%	%	%	%
<b>Industry</b>	<b>92</b>	<b>64</b>	<b>35</b>	<b>5</b>
25,000 and under	91	55	16	5
25,001-50,000	90	87	51	5
50,001-100,000	94	79	66	6
100,001-200,000	100	91	60	-
200,001+	88	70	54	13

NAA 2015 Circulation Facts, Figures & Logic



2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

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The challenge of  
minimizing sellouts in a  
period of higher prices  
and lower sales.



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2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Trend: Sales Per Outlet of <u>Daily</u> Newspaper			
OTC			
	2014	2011	2008
Q.39c	#	#	#
<b>Industry</b>	<b>10</b>	<b>11</b>	<b>13</b>
25,000 and under	11	12	15
25,001-50,000	11	12	12
50,001-100,000	9	9	11
100,001-200,000	7	8	12
200,001+	6	7	11
Trend: Sales Per Outlet of <u>Sunday</u> Newspaper*			
OTC			
	2014	2011	2008
Q.39c	#	#	#
<b>Industry</b>	<b>19</b>	<b>23</b>	<b>25</b>
25,000 and under	16	20	23
25,001-50,000	21	30	23
50,001-100,000	19	28	28
100,001-200,000	25	23	30
200,001+	16	18	33



2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

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<b>Median Sellout percentages for Daily and Sunday Editions</b>		
Q.38a	Daily 2014	Sun 2014
	%	%
<b>Industry</b>	<b>20</b>	<b>17</b>
25,000 and under	12	15
25,001-50,000	20	19
50,001-100,000	20	18
100,001-200,000	28	21
200,001+	25	23

NAA 2015 Circulation Facts, Figures & Logic





2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

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Trend: Return percentages for Sunday Editions - Total Combined			
	2014	2011	2008
Q.37b	%	%	%
<b>Industry</b>	<b>23</b>	<b>20</b>	<b>20</b>
25,000 and under	23	20	20
25,001-50,000	24	19	19
50,001-100,000	23	19	20
100,001-200,000	22	21	19
200,001+	26	25	19

NAA 2015 Circulation Facts, Figures & Logic

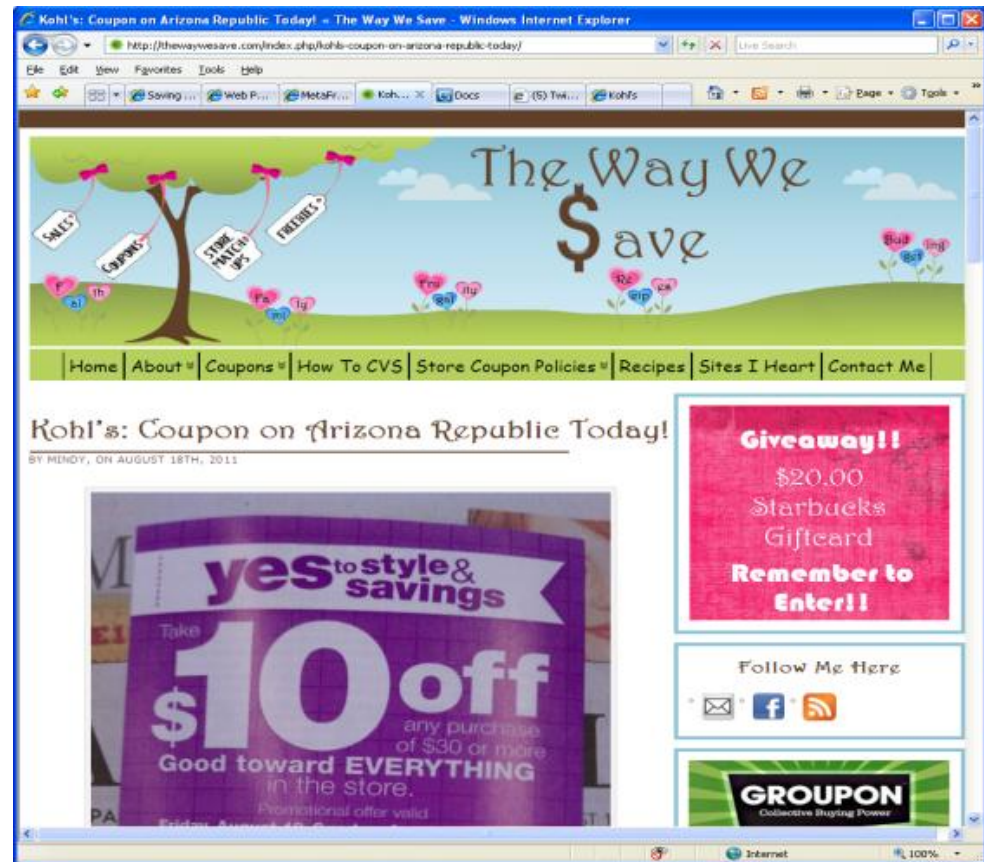


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# Promote, Promote, Promote... Cross Platform Engagement

- Bloggers
- Facebook
- Twitter
- YouTube
- Email
- Online
- Print



# Pushing Value...

azcentral.com

Having trouble viewing this email?  
VIEW THIS EMAIL AS A WEB PAGE

## sunday news and deals

### Coming This Sunday in The Arizona Republic

#### DINING



#### [Sunday Brunch](#)

Who doesn't love brunch! Find out where to get a Sunday Mexican brunch for only \$16.99!

#### STAYCATION



#### [Resort Living](#)

Need a getaway? Pick up Sunday's Republic to find out where you can extend your next staycation - resorts that let you save more by staying longer!

#### EVEN MORE DEALS



#### [Dining](#)

Don't miss this Sunday's Republic Classified Deals section to find the best weekday dining deals!

#### HOME DELIVERY

#### [Subscribe and Save](#)

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REPUBLIC

Already this year, The Arizona Republic has provided \$21,500 in savings! Subscribe today and get the best local deals, jobs, and in-depth investigative stories.

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GET SUNDAY  
**HOME DELIVERY**  
+  
GET WEDNESDAY  
AT NO ADDITIONAL  
COST!

FOR  
ONLY  
**\$1**

THE ARIZONA REPUBLIC

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SUBSCRIBE

THE ARIZONA  
REPUBLIC

## COMING SUNDAY

# PHILLIES PREVIEW

# BIGGEST JOB SECTION OF THE YEAR!

## EMPLOYMENT SUPER SUNDAY

PLUS: Money-saving coupons inside!

[careerbuilder.com](#)

TheNewsJournal  
[delawareonline.com](#)

Worth  
every  
cent.



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# The Total Value Proposition...



When you read The Enquirer, you  
**Get Connected.**

Pick up the Enquirer at  
local stores, or subscribe today.

**THE ENQUIRER**  
Cincinnati.com

- News Content & Features
- Coupons & advertisements
- Effective merchandising techniques
- Ongoing promotional marketing campaign pushing value
- Cross divisional teams inside newspapers focusing on volume and reach



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# Develop those retailer partnerships...



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# THE ARIZONA REPUBLIC

## Retail Creative Display Contest

Thanksgiving Day  
Sunday before Mother's  
Day

Prime position all year

## The Arizona Republic

DAILY & SUNDAY CIRCULATION  
217,000/364,000

### SALES SOURCE

Creative Retail Display Contest

### TARGET AUDIENCE

Strengthens retail relationships and  
maintains prime positioning at key retail  
chains



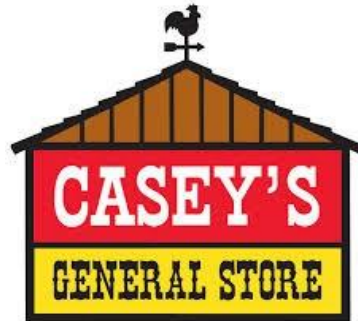
# GANNETT

It's all within reach.

**500+**  
Displays placed

**+7%** Daily

**+4%** Sunday  
SINGLE COPY  
INCREASE



## DAILY & SUNDAY CIRCULATION

### **Des Moines Register**

75,000 daily 135,000 Sunday

### **Sioux Falls Argus Leader**

25,000 daily 40,000 Sunday

### **Springfield News-Leader**

27,000 daily 38,000 Sunday

### **St Cloud Times**

16,000 daily 22,000  
Sunday



**Cost of single unit with Sunday fold up: \$130**

# Building the Sustainable Business Model

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Summary...

## **The Value of Audience and Content –**

An Audience Metrics Update



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# What's Working and Benchmarking the Progress...

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- Today's Newspaper Audience - Where the new reader's are
- Operational Efficiencies
- New Revenue: Marketing the Total Access Model
- Marketing to the Occasional Reader
- **Telling your newspaper's story**
- **Strategic Issues in AAM Reporting**
- Identifying the priorities



# AAM Changes: An Obligation and an Opportunity

**Consolidated Media Report** **Anytown News Group**  
Anytown, CT

4 quarters ended March 31, 2016  
Subject to Audit

**Engage Anytown.  
Get Results.**

Anytown and anywhere, Anytown News Group brands provide engaging premium content to consumers along with integrated marketing, media and business solutions to advertisers. Our media portfolio delivers customized solutions that align with your need — helping our business to achieve results.

**Anytown News Group**

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**PRINT**  
Anytown News Group  
4 quarters ended March 31, 2016  
Subject to Audit

**PUBLISHING PLANS**

<b>Anytown News</b>	Frequency: Daily Circulation: Print, digital, mobile Printed circulation classification: Paid Other information: Includes an online digital edition through a mobile app. Also includes a subscription service for digital editions. Includes a mobile app for smartphones and tablets.
<b>Sunday Direct</b>	Frequency: Weekly Circulation: Print only Printed circulation classification: Quality Other information: N/A
<b>Anytown Youth News</b>	Frequency: Weekly Circulation: Print only Printed circulation classification: Quality Other information: N/A
<b>Municipal News</b>	Frequency: Weekly (not every 7th day) Circulation: Print only Printed circulation classification: Paid Other information: N/A

**CIRCULATION\***

Newspapers	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Monthly
Anytown News	64,000	70,000	70,000	70,000	81,000	70,000	74,000	74,000			
Sunday Direct	24,000										
Anytown Youth News	198,727	198,727	198,261	198,822	198,861	198,861	198,861				
Municipal News											25,000
<b>Total Combined Average Circulation</b>	<b>198,987</b>	<b>268,727</b>	<b>268,261</b>	<b>268,822</b>	<b>274,861</b>	<b>268,861</b>	<b>268,861</b>	<b>268,861</b>	<b>268,861</b>	<b>268,861</b>	<b>268,861</b>

\*Figures include a digital edition.  
\*Figures are based on circulation data for the number of issues published, not the number of advertising spots.

Page 2 of 8 01-00003  
Alliance for Audit Media



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# What's Working and Benchmarking the Progress...

---

- Today's Newspaper Audience - Where the new reader's are
- Operational Efficiencies
- New Revenue: Marketing the Total Access Model
- Marketing to the Occasional Reader
- Telling your newspaper's story
- Strategic Issues in AAM Reporting
- Identifying the priorities



# Proven Strategies and Practices for Building Audience



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## SUMMARY:

*“While common approaches emerge across these papers and those profiled in the past, one theme consistently rises to the top year after year: leadership commitment to delivering increases in total print and online readership.”*



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## Proven Strategies and Practices for Building Audience



NEWSPAPER ASSOCIATION OF AMERICA

Other common strategies that surfaced include:

- *Knowing your audience well enough to identify new opportunities.*
- *Developing a integrated coherent strategy for digital.*
- *Focused investments in journalism.*
- *Smart investments of limited marketing dollars.*
- *Continued investments in print.*
- *Digital refinements*
- *Blocking and tackling*



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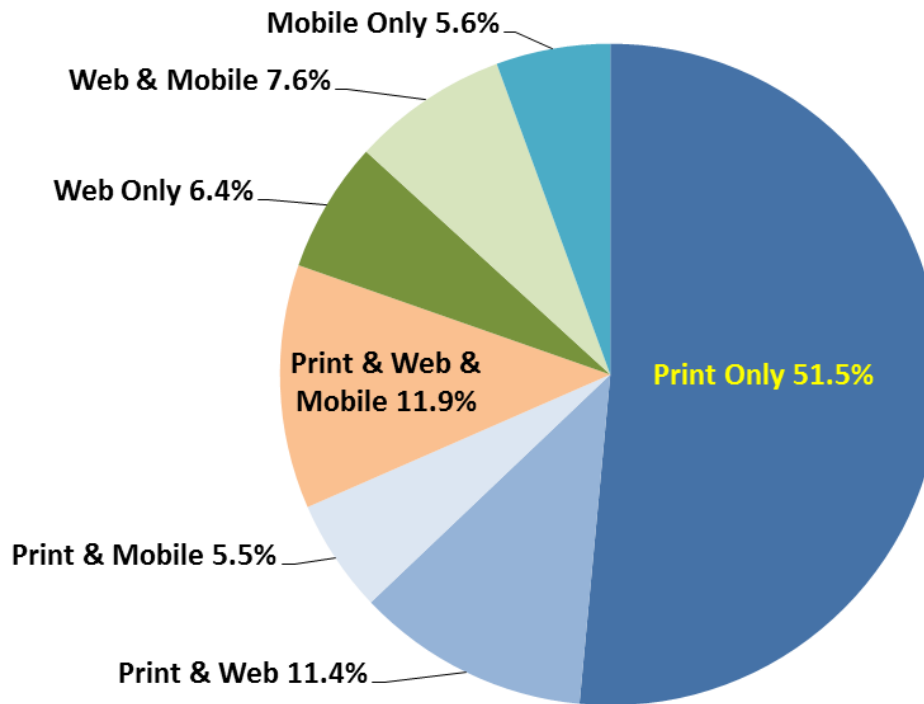
# Audience Development: Focus on Where the Growth is...

- ✓ The mobile audience skews young; the median age of an adult newspaper mobile user is 17 years younger than the print reader.
- ✓ The mobile-exclusive audience is even younger and that mobile-exclusive audience and it is the growth area.
- ✓ The majority (59%) of young adults, ages 18-24, read newspaper media in a typical week or access it on a mobile device in a typical month.
- ✓ The mobile newspaper audience is growing fast across age groups.



# Audience Development: Focus on Opportunities to Engage Readers...

**Compositon of Newspaper Media Audience by Platform**  
(Past 7 Days)

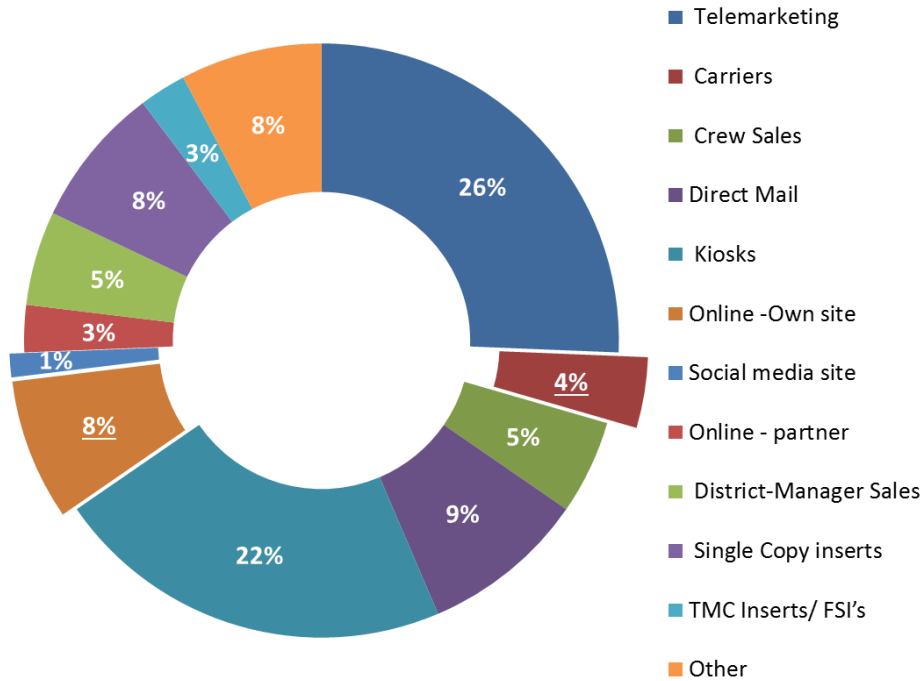


Source: Nielsen Scarborough, Release 2, 2014



# Audience Development: Take a step back and consider your entire investment to acquire long-term subscribers...

Subscription Sales Sources:





# SUMMARY:

## Building the Sustainable Business Model

---

### Audience Development:

- ✓ Know your audience and your market
- ✓ Leverage the power of your brand
- ✓ A product for every household and across multiple platforms
- ✓ Reward consumers for engagement
- ✓ Think total audience and how you can deliver that audience to your advertisers.
- ✓ Think in terms of the individual user level, their data, their media choices and be sure you have something for everybody.



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# Audience Development is Engaging Consumers.

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Thank you!



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Ohio Newspaper Association  
2015 Annual Conference