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Advancing Newspaper Media

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# Single Copy Sales: Building Audience & Revenue ...and Benchmarking the Process



ONA's  
"Retail Revenue & Sales  
Strategies"

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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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Strategies

...And measuring our progress.



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Strategies

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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
- The Role of Audience and Circulation in Building a Sustainable Business Model
- Marketing to the Occasional Reader
- Telling your newspaper's story
- Summary: Identifying the priorities



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# Today's Newspaper Audience



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# Goin' Mobile



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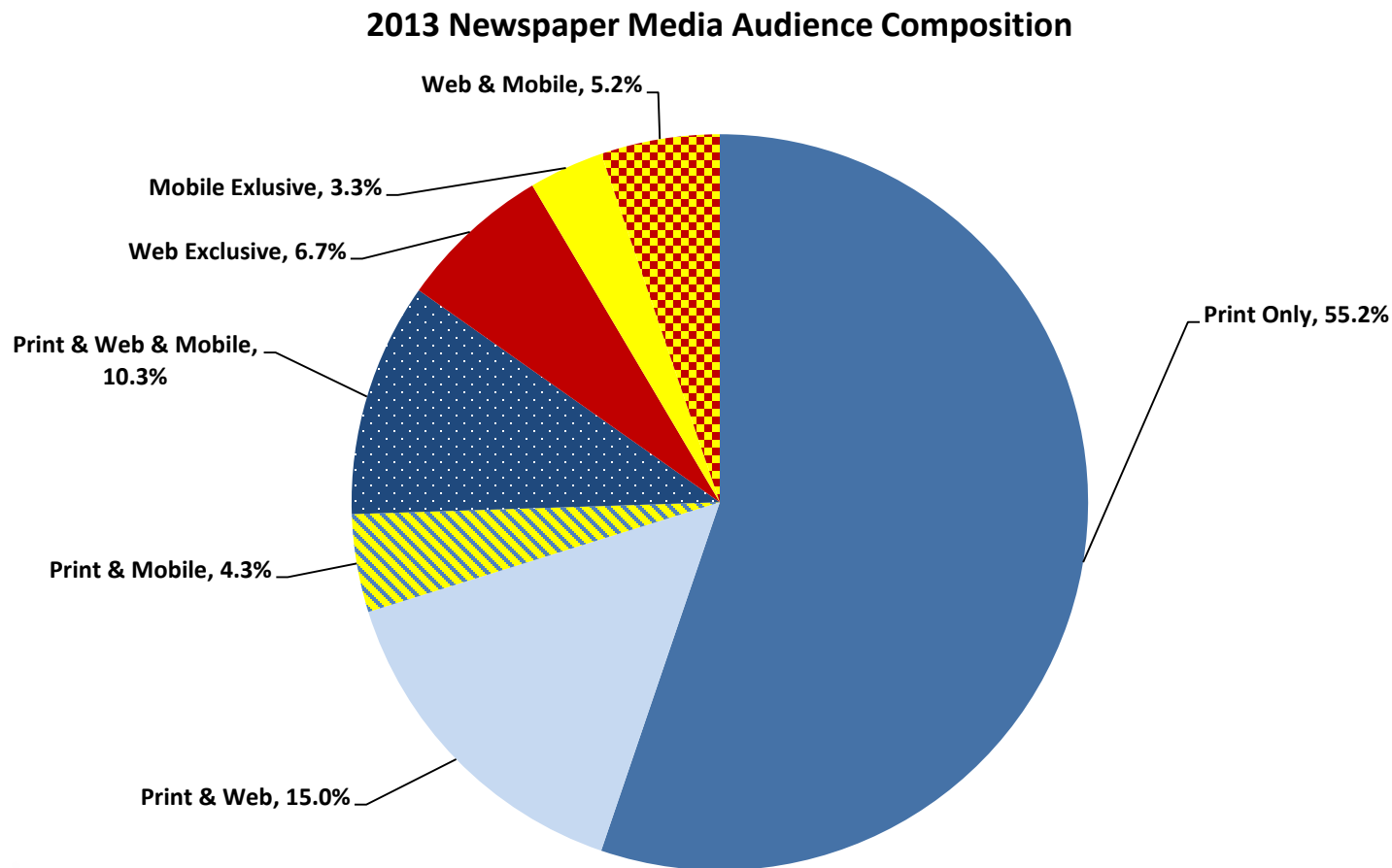
# The Digital Audience



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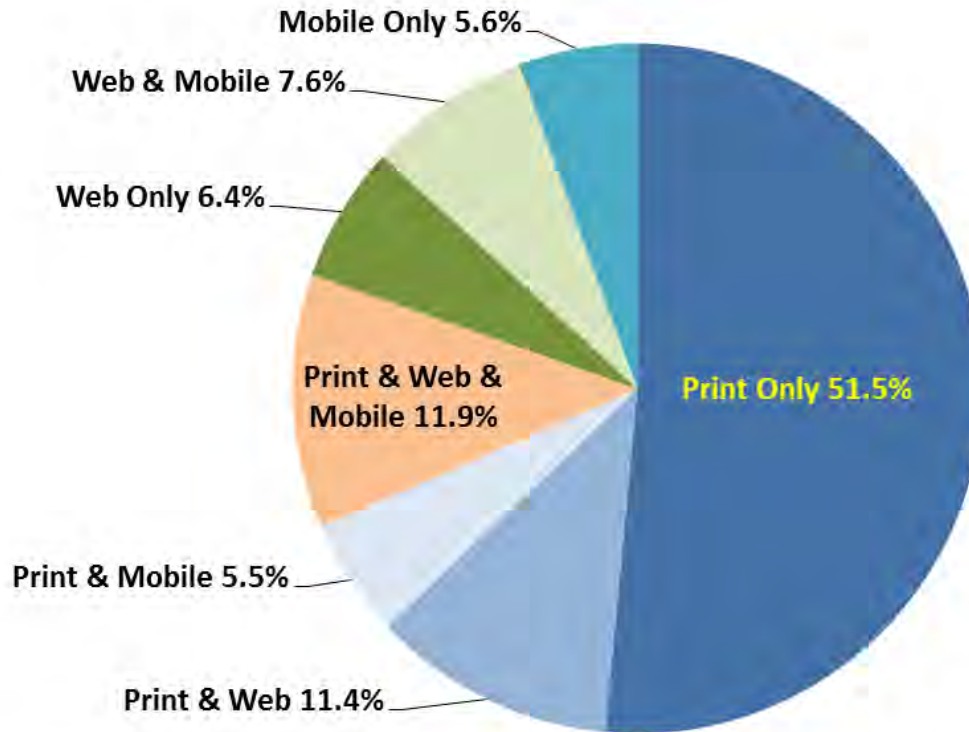
# Opportunities to Engage Readers





# 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
Base Total Adult Population	241,532,600	0.6%
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%
Past Week Plus Mobile 30	158,451,700	-1.6%
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%



# 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

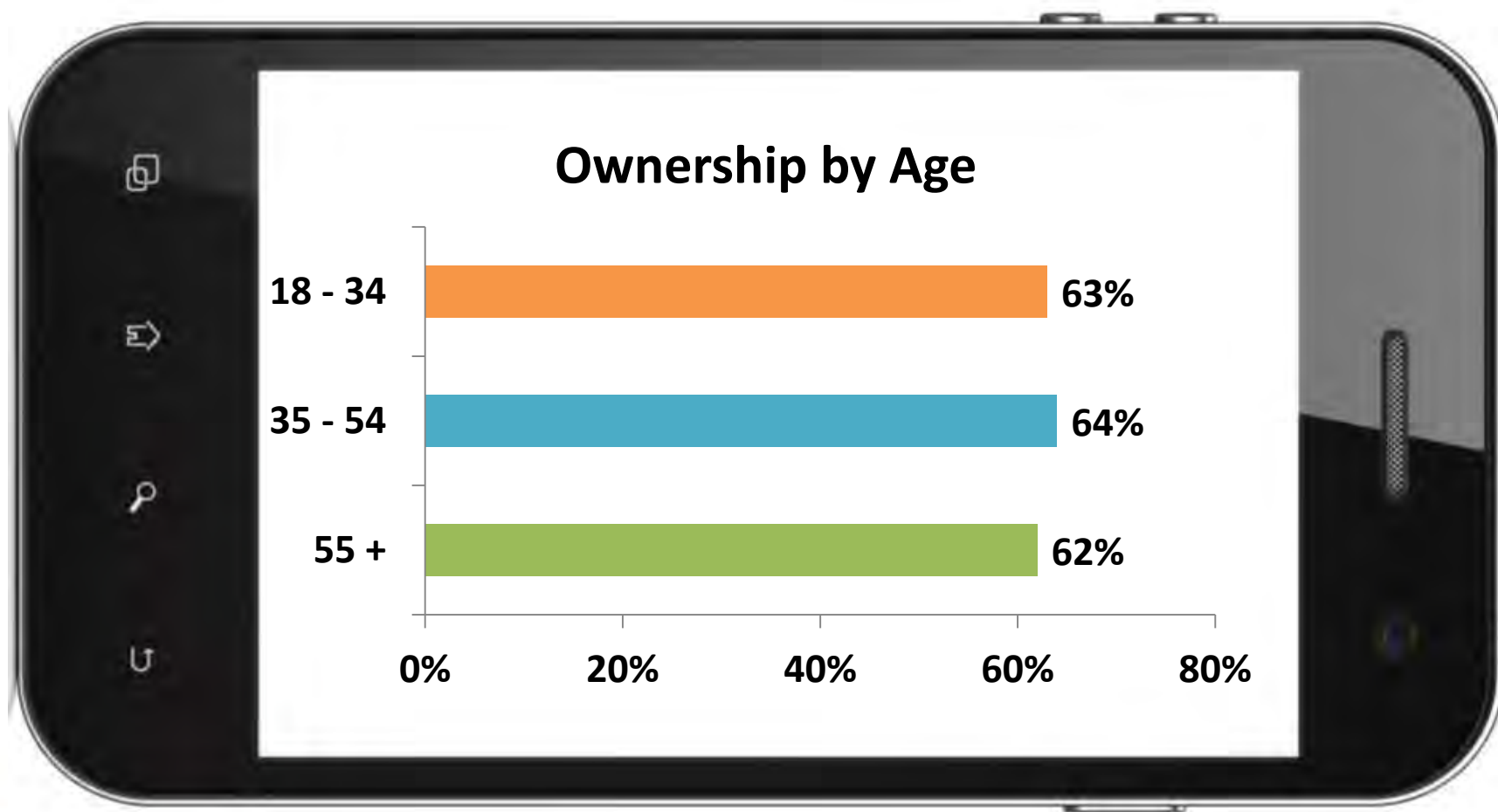
\* Print, Mobile or PC Web newspaper media usage



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# Surge in Smartphones



Source: Reynolds Journalism Institute, May 2014



# Millennials and Mobile



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# Millennials and Mobile

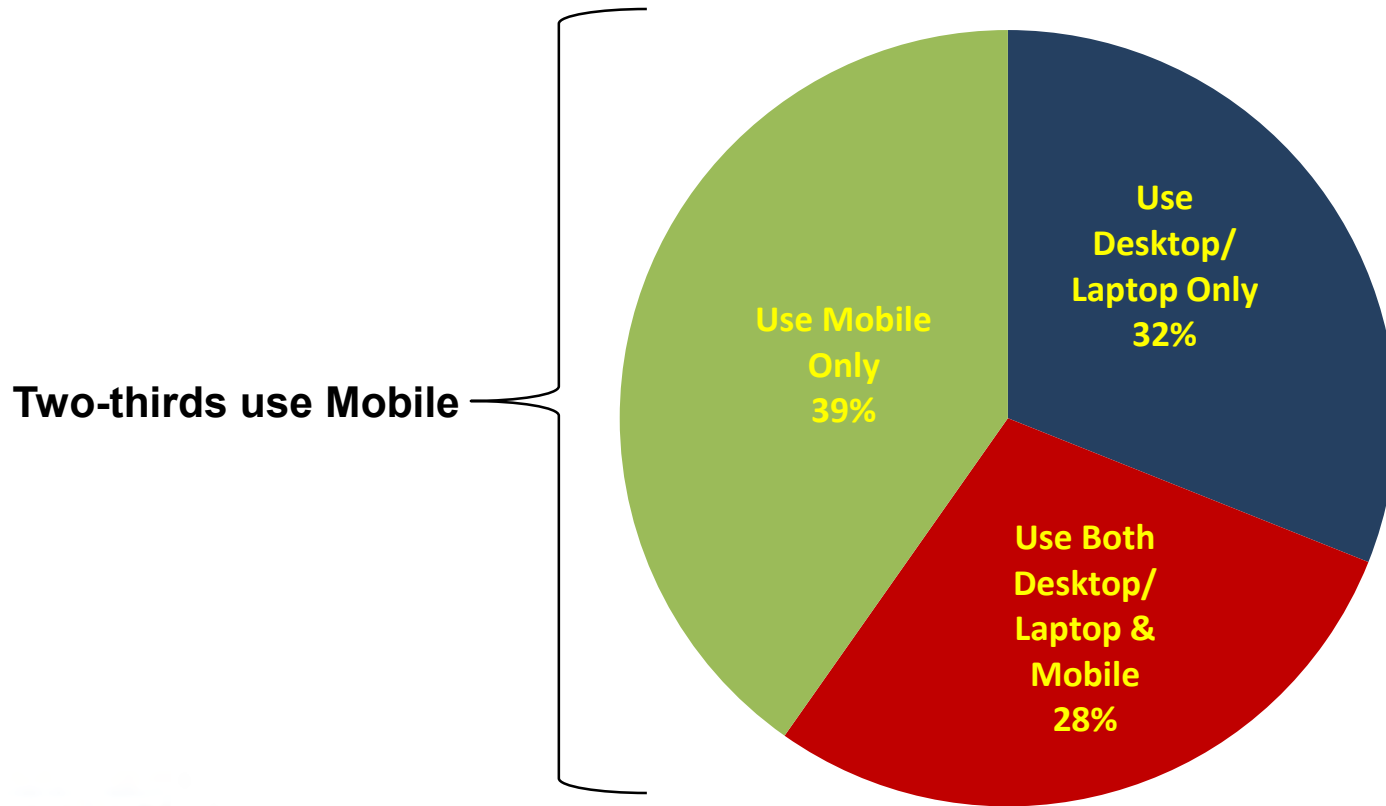


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# Digital Audience: 176 Million Unique Visitors

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



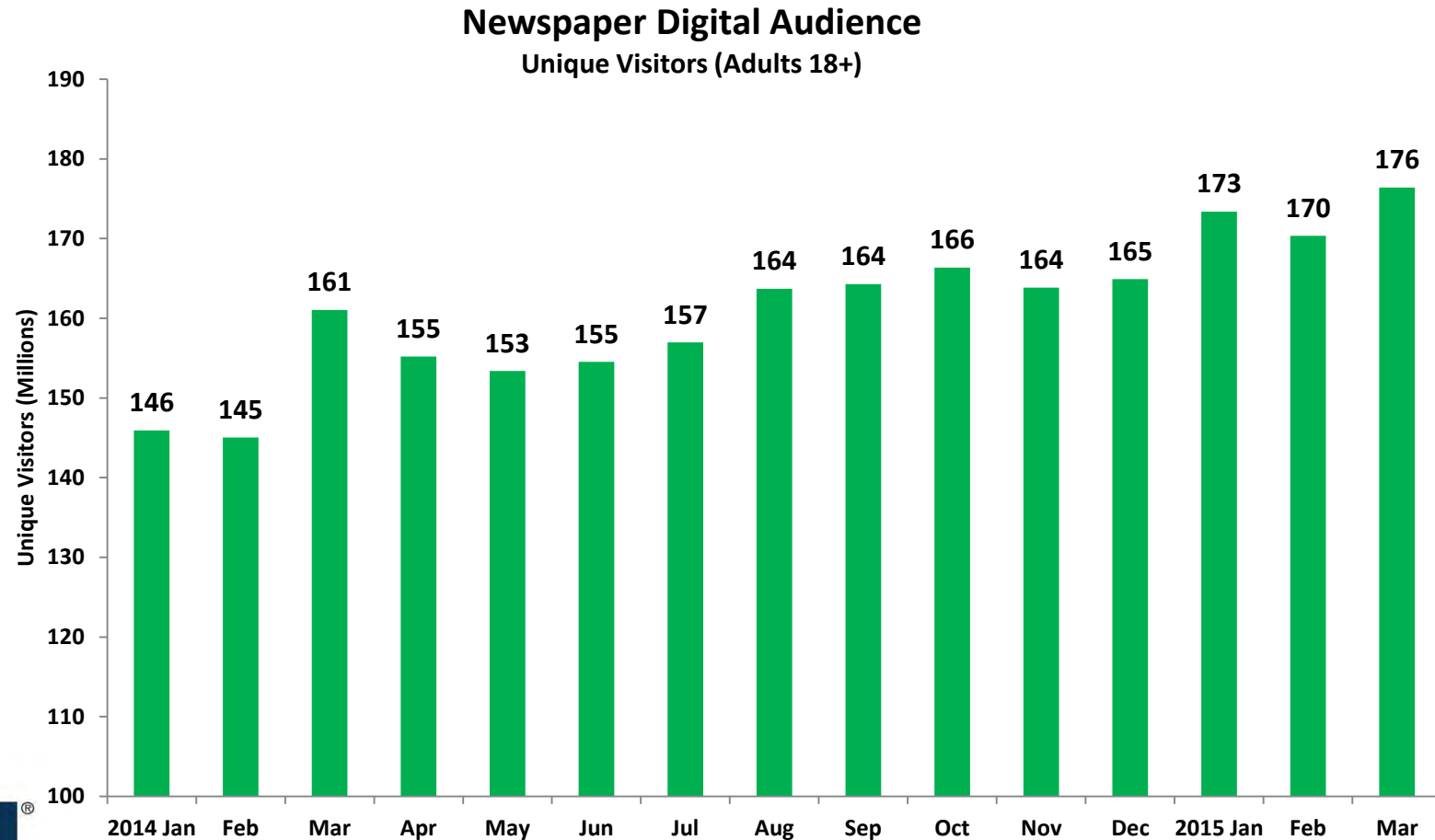
Source: comScore



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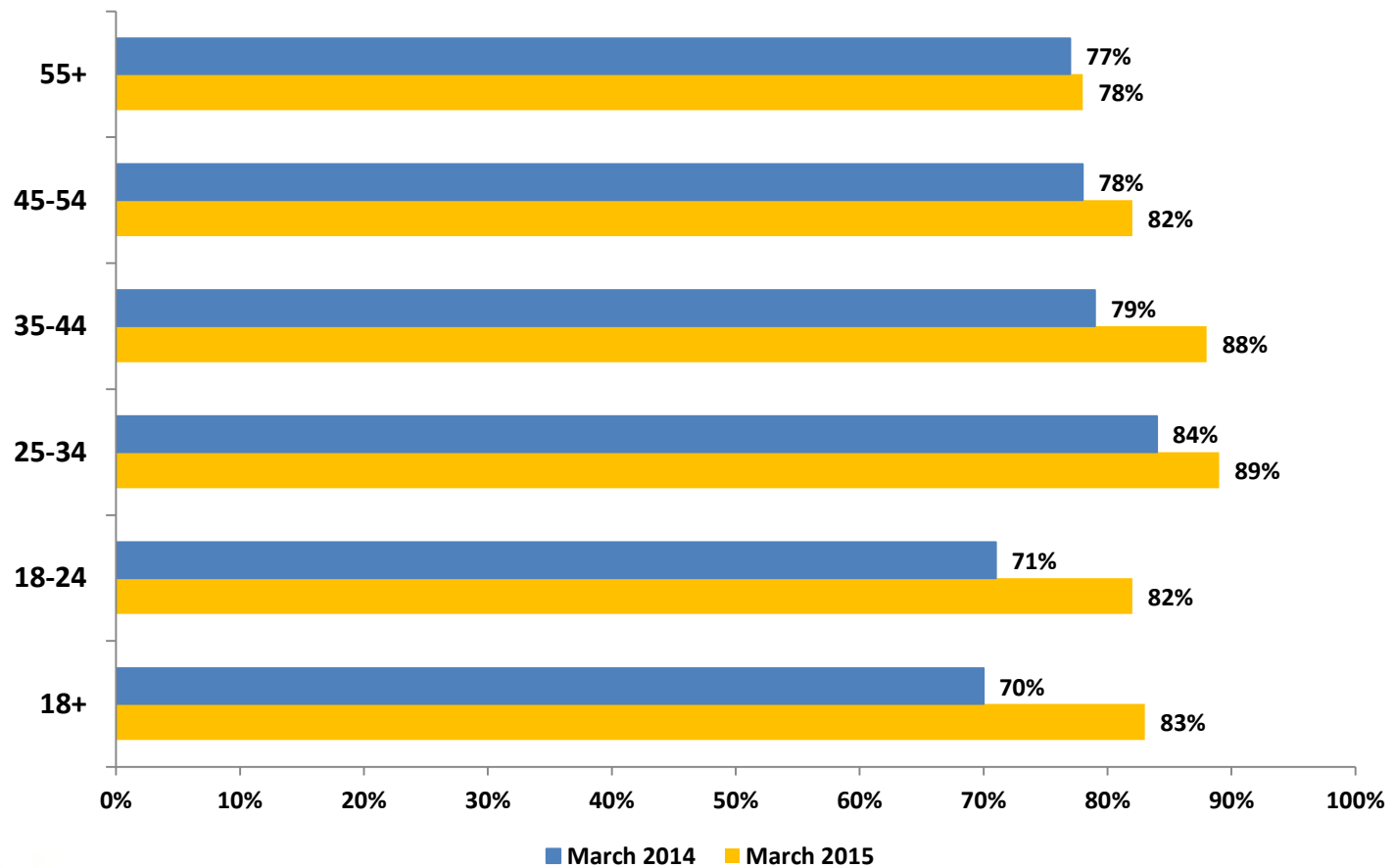
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# Newspaper digital media now reaches more than 8 in 10 online adults in the U.S.



# Reach Increased for All Age Groups

Net Reach Among Unique Visitors by Age  
for Newspaper Digital Content



Source: comScore

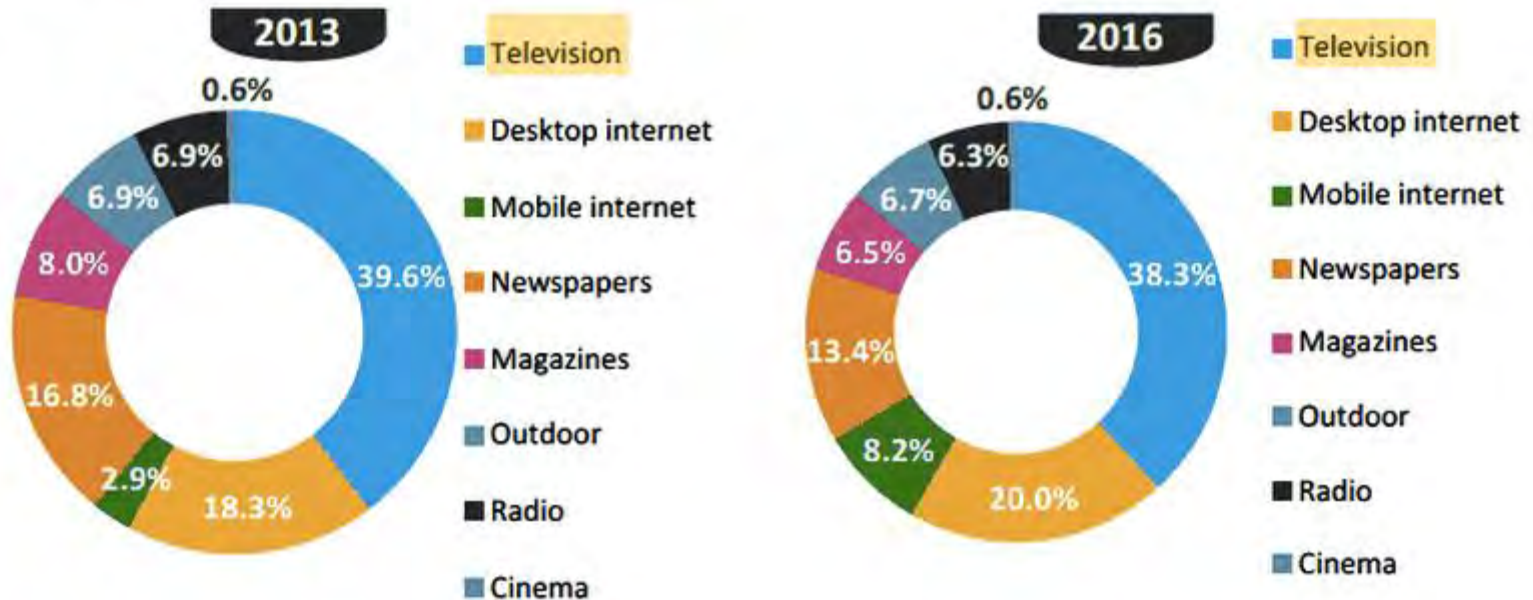


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# Relevance of Mobile Audiences

Share of global adspend by medium (%)



Source: ZenithOptimedia



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# Building the Sustainable Business Model

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New Revenue Streams:

The Value of Content



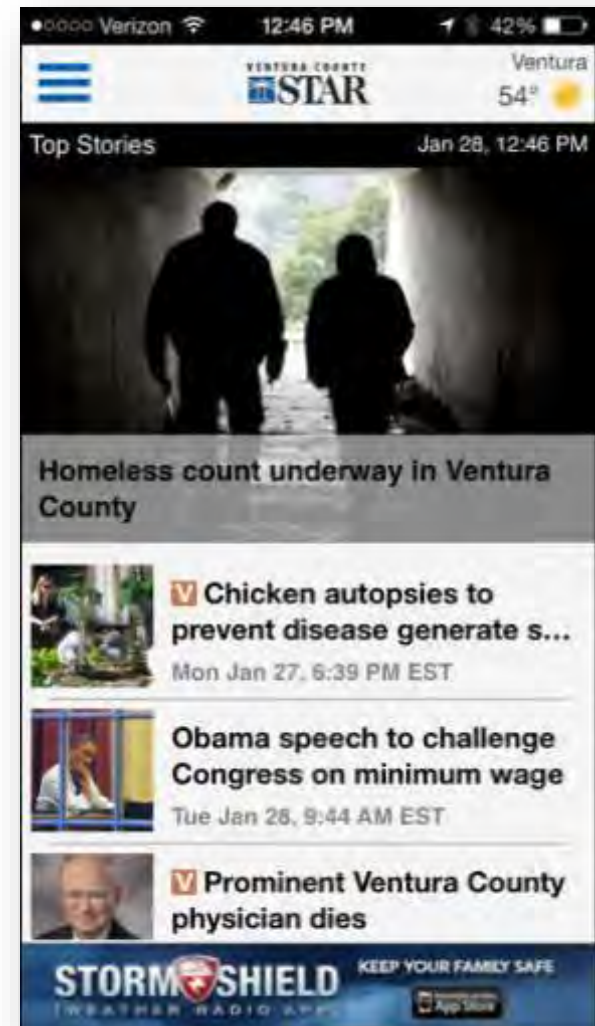
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# Marketing Digital Content and the Revenue Possibilities...



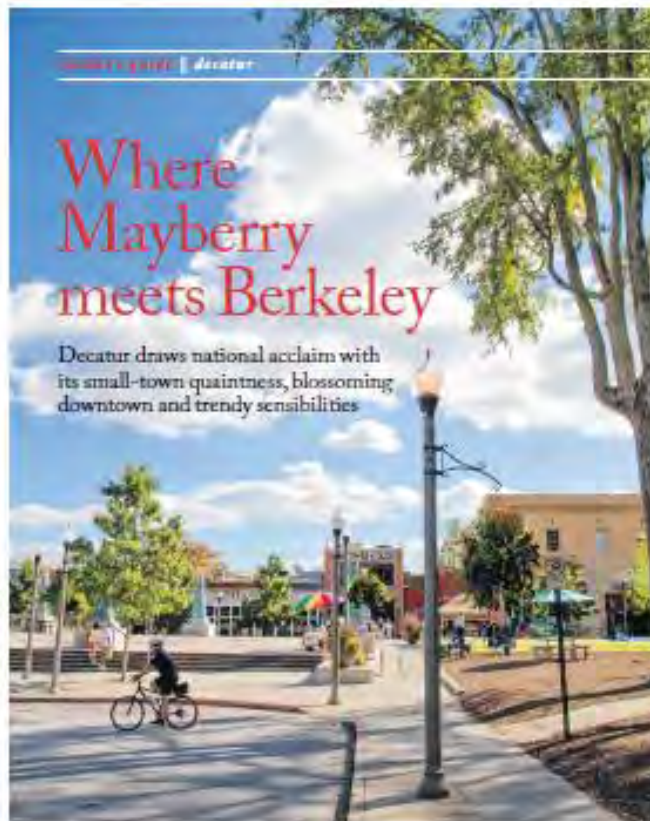
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# Marketing Digital Content and the Revenue Possibilities...



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PLEASE VISIT OUR APP BY CLICKING HERE >>  
(click on the calendar icon in the top left for 2014 issues)



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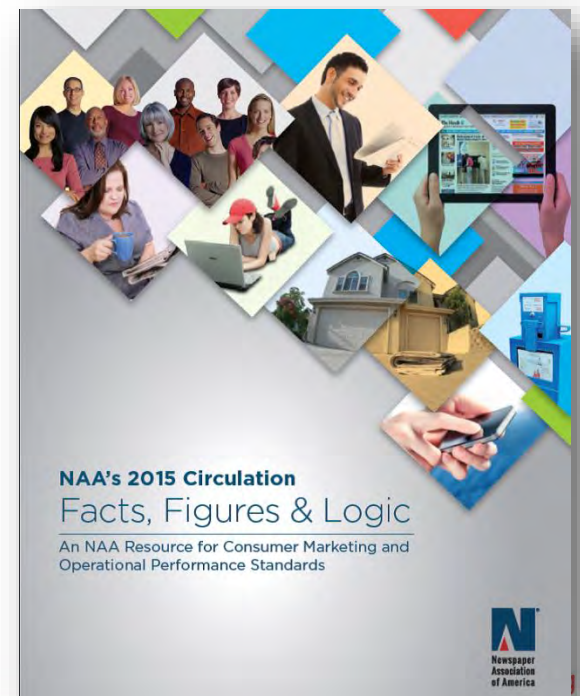


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# What's Working and Benchmarking the Progress...

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# Making A Difference...

Circulation: Bottom Line Contribution		
	2014	2011
<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





# 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%

NAA 2015 Circulation Facts, Figures & Logic



# Operational Changes

Trend: Outsource Any Home Delivery			
	2014	2011	2008
	%	%	%
<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

NAA 2015 Circulation Facts, Figures & Logic



# Operational Changes

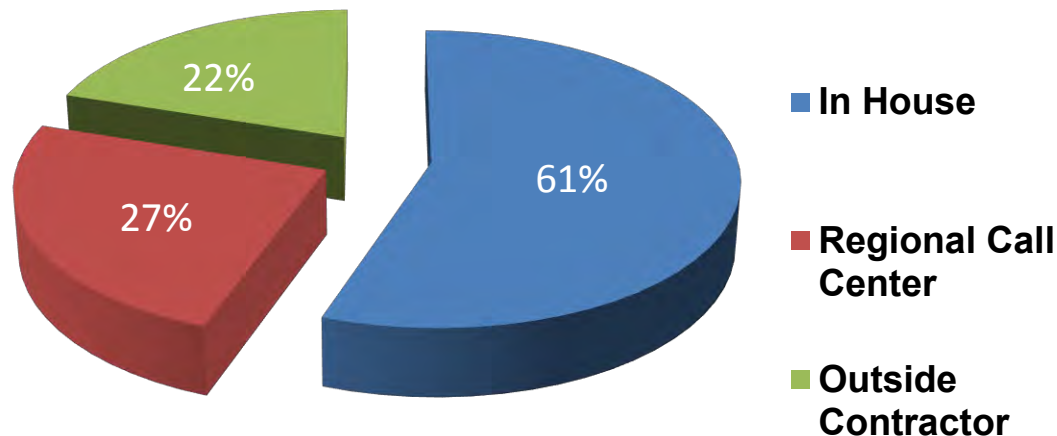
Newspapers that Deliver Other Different Publications			
	Yes, Deliver Other Publications		Number of Different Publications Delivered Daily
Q.13	2014		2014
	%		#
<b>Industry</b>	<b>43</b>		<b>4</b>
25,000 and under	27		2
25,001-50,000	48		4
50,001-100,000	68		3
100,001-200,000	93		10
200,001+	78		7

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# Operational Changes

## How Customer Service Function is Performed...



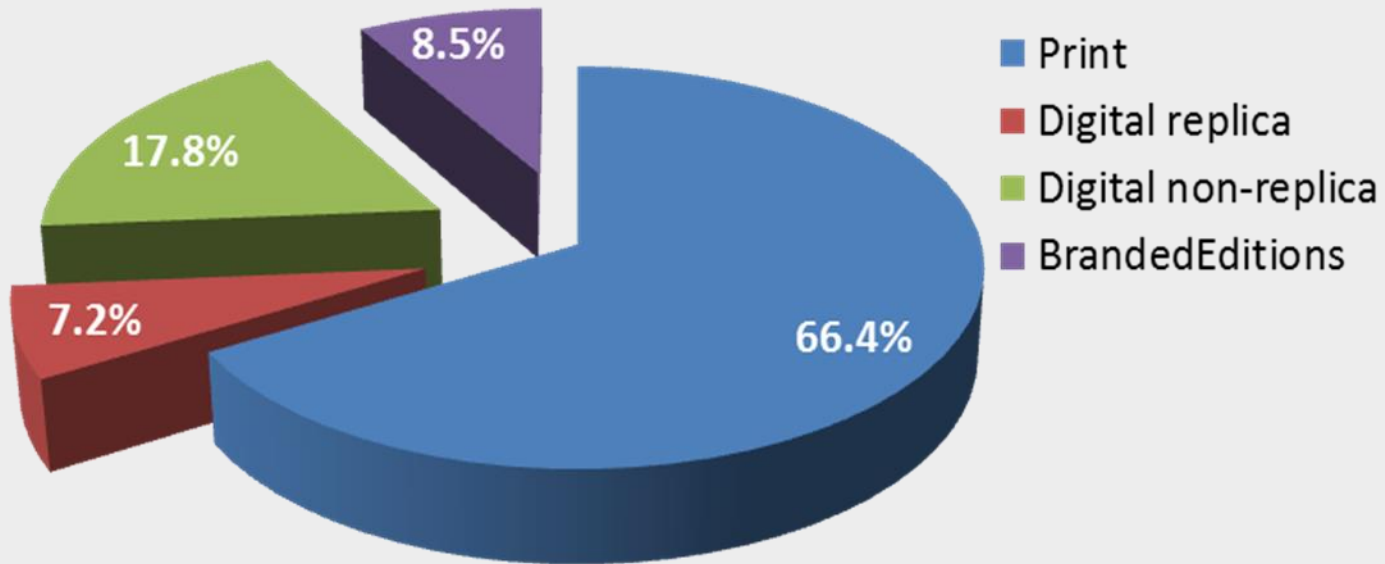
# New Revenue Streams: The Value of Content



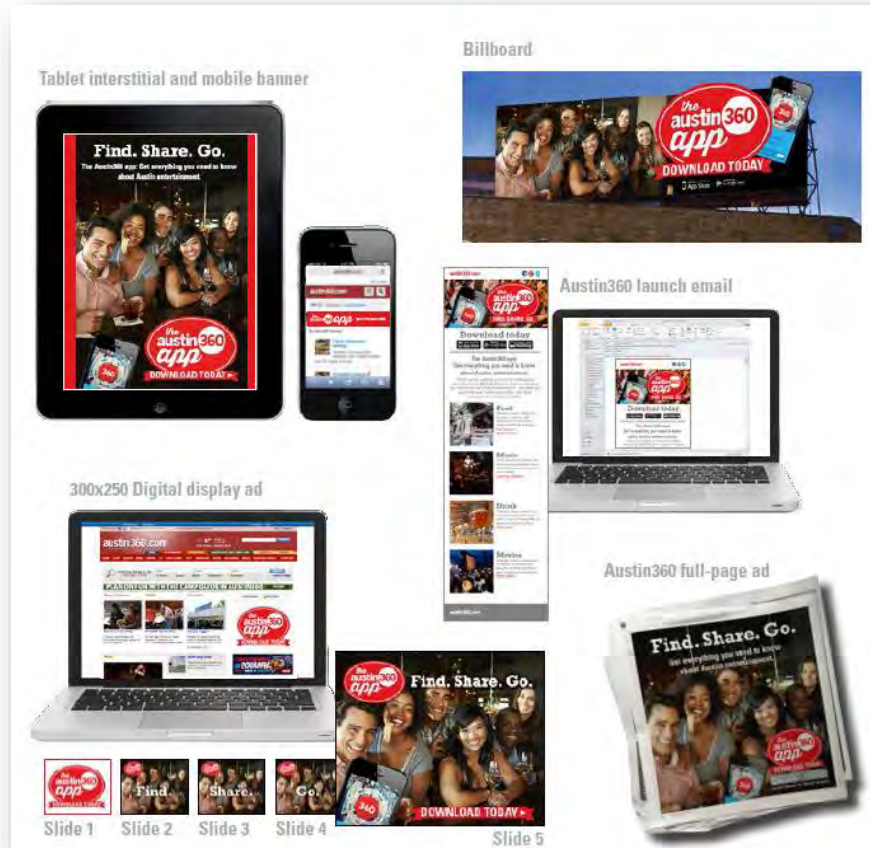


# Two thirds of total daily circulation is traditional print

Weekday Circulation by Publishing Platform



# Marketing Digital Content and the Revenue Possibilities...



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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

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# Marketing Home Delivery

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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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# 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>
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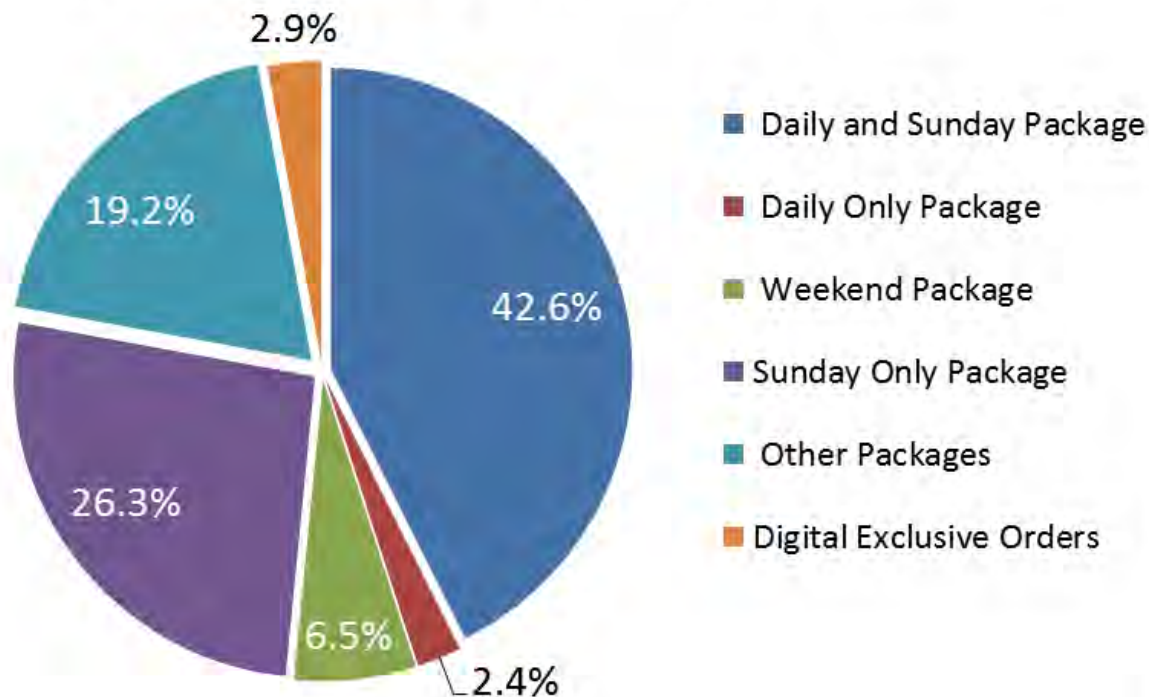




2015 Circulation Strategies: Building the  
New Business Model

# Marketing Home Delivery

Type and Frequency of Subscriptions Sold



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# Marketing Home Delivery and Maximizing Revenue

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Trend: Offer Lower Subscription Rate for Easy Payment Plan			
Q.30	2014	2011	2008
% Yes	%		%
Industry	59	74	92
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

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# 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

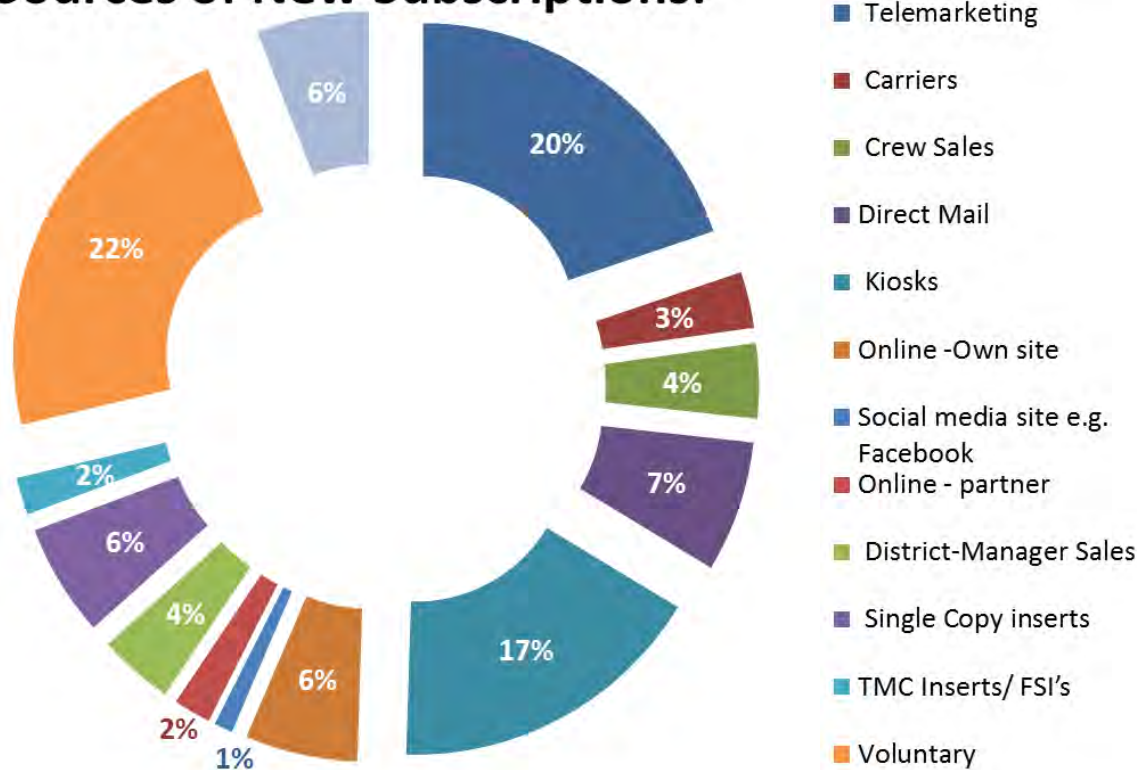
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# Marketing Home Delivery

Sources of New Subscriptions:



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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

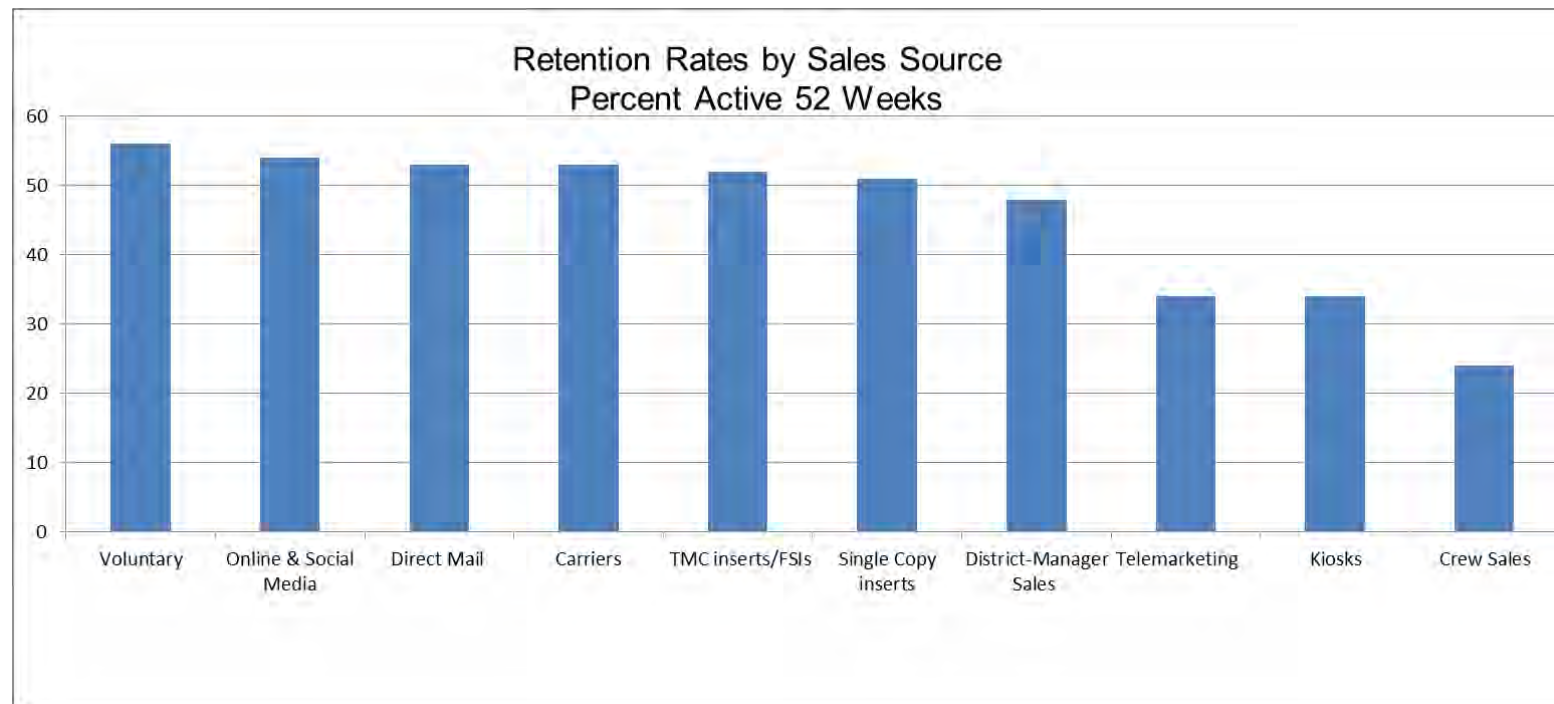
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# Marketing Home Delivery



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# 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

NAA 2015 Circulation Facts, Figures & Logic



# Marketing Home Delivery

Have Customer Loyalty/Value-Added or Frequent Reader Program		
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



# Email Marketing



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Our records indicate that **your newspaper is set to stop** this Saturday, January 17.

That means you'll miss out on the money-saving coupons in this Sunday's Bee. This week features over \$64 in savings and coupons from local retailers like Walmart, Harbor Freight, Starbucks and more.

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Dear Maria Expire Pr:

**Your Sacramento Bee subscription is going to expire within the next 10 days.**

Please click on the button below to make your payment right now.

**Make A Payment**

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If you have any questions, please contact our Customer Service Team at **1-800-284-3233**; we're here to help!

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2015 Circulation Strategies: Building the  
New Business Model

# 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

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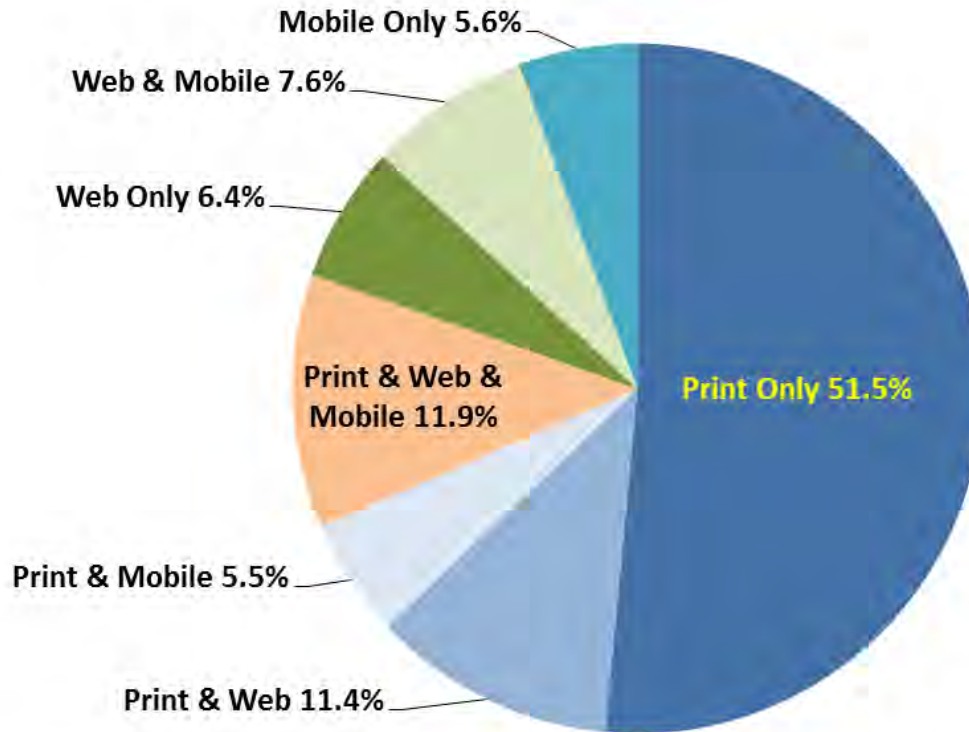
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# Opportunities to Engage Readers

**Compositon of Newspaper Media Audience by Platform**  
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Source: Nielsen Scarborough, Release 2, 2014



# 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	

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# 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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## Get Digital Access



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# Marketing Digital Content and the Revenue Possibilities...

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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.

**Get Digital Access**





# Driving Digital Subs

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

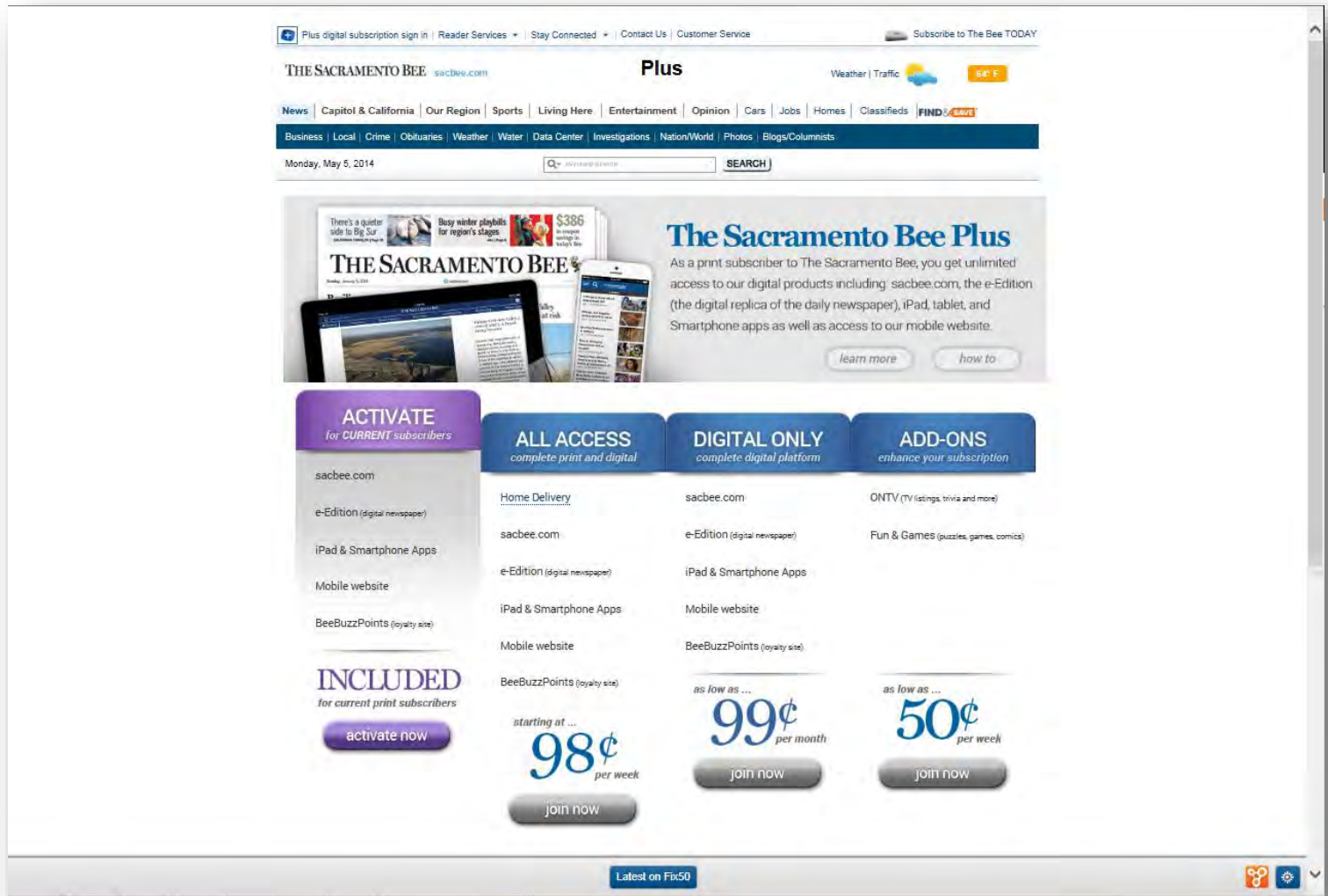


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# Driving Registration & Adoption



The screenshot displays the 'The Sacramento Bee Plus' subscription page. At the top, there's a navigation bar with links like 'Plus digital subscription sign in', 'Reader Services', 'Stay Connected', 'Contact Us', and 'Customer Service'. Below this is the main header with 'THE SACRAMENTO BEE' logo, a 'Plus' badge, and a weather widget. A secondary navigation bar lists various news categories. The main content area features a large banner for 'The Sacramento Bee Plus' with an image of the newspaper and digital devices. Below the banner, there are three main subscription options: 'ACTIVATE for CURRENT subscribers', 'ALL ACCESS complete print and digital', and 'DIGITAL ONLY complete digital platform'. Each option lists included features like 'sacbee.com', 'e-Edition', 'iPad & Smartphone Apps', 'Mobile website', and 'BeeBuzzPoints'. Pricing is shown at the bottom: 'starting at ... 98¢ per week' for All Access, 'as low as ... 99¢ per month' for Digital Only, and 'as low as ... 50¢ per week' for Add-ons. A 'Latest on Fix50' badge is visible at the bottom right of the page.

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Monday, May 5, 2014 | Q- ADVANCED SEARCH | SEARCH

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# **DIGITAL SUBSCRIPTION GROWTH:**

- Engagement = Print Retention
- Engagement = AAM Circulation
- Engagement = Increased Traffic
- Engagement = Value and Revenue
- Engagement = Building the Brand



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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





Single Copy Sales:

# **Building Audience & Revenue**



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2015 Circulation Strategies: Building the  
New Business Model

# The Challenge of building audience & revenue

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# The Sunday Single Copy Buyer

- They are younger, earn a good living and shop for value.

Age	Subscribers	Single Copy
18-34	13.8%	<b>31.4%</b>
35-54	33.4%	<b>41.3%</b>
55 & over	52.7%	<b>27.3%</b>
Employed F.T.	40.1%	<b>47.6%</b>
Wal-Mart (past 30 days)	47.4%	<b>56.2%</b>
Target (past 30 days)	42.8%	<b>40.7%</b>



# 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."

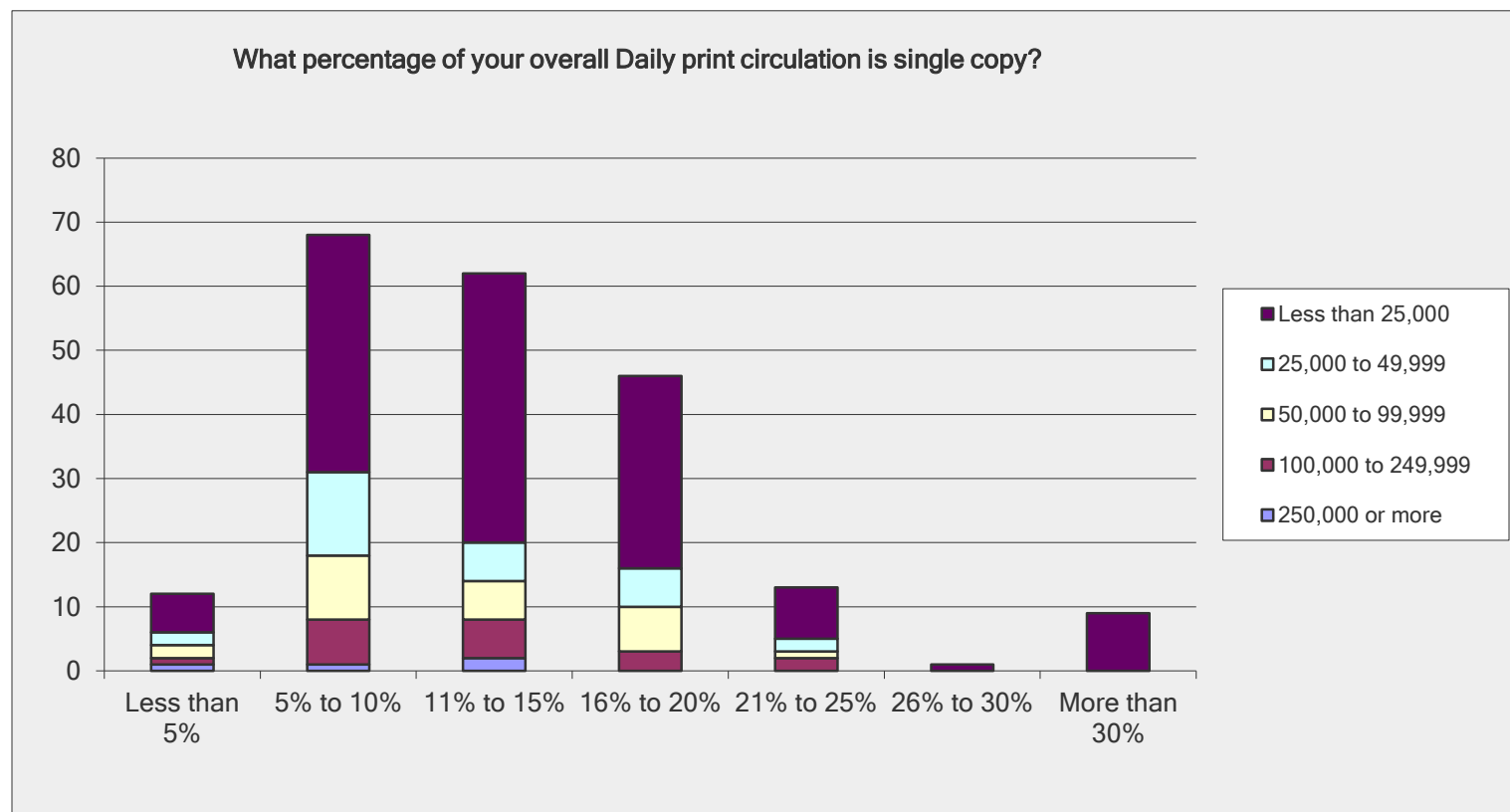
So, too millennial coupon users are looking to the FSI – with 63% of this age group using traditional print coupons. (1)

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.

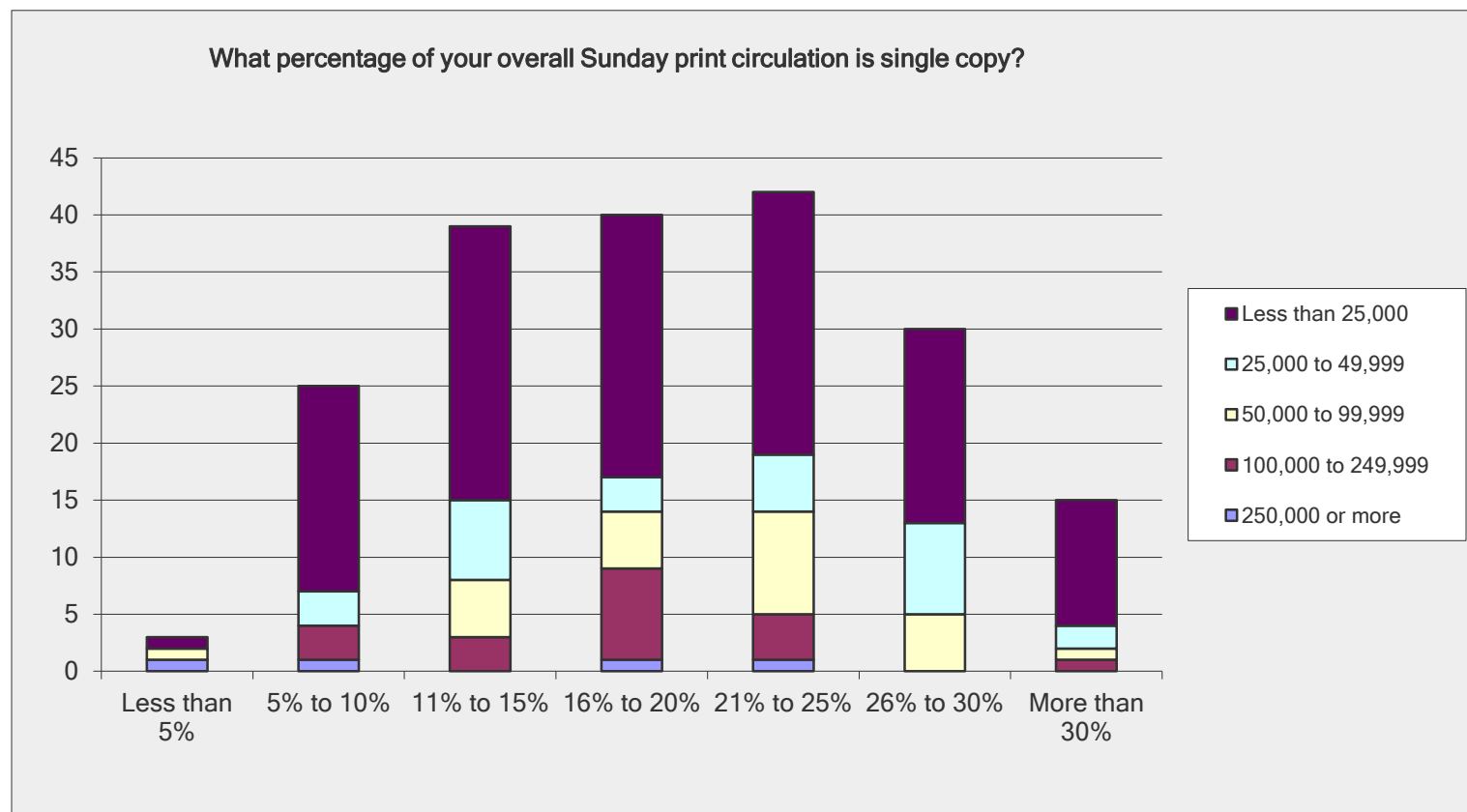
"The data we collected shows that while digital coupons are an important saving tool, traditional paper coupons are still a predominant player in the world of savings," said Neal Heffernan, SVP, Shopper & Retail Strategy, GfK Custom Research.



# Single Copy Snapshot



# Single Copy Snapshot



# 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
Total	593	\$1.50	141
		\$1.25	40
		\$1.00	25
		\$0.75	4
		\$0.50	2
		Total	517



# Retailing the Newspaper

Trend: Prices Offered by Newspaper Weekday Single Copy			
	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





# Retailing the Newspaper

Trend: Prices Offered by Newspaper Sunday Single Copy			
	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



# Retailing the Newspaper

Trend: Charge Premium On Holiday				Other Holiday
	Thanksgiving			
Q.36e	2014	2011	2008	2014
	%	%	%	%
<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

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## 2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Trend: Margin for Single copy Distributors/Agents on a Buy/Sell Agreement						
	Daily			Sunday		
	2014	2011	2008	2014	2011	2008
Q.42a	%	%	%	%	%	%
<b>Industry</b>	<b>20</b>	<b>24</b>	<b>26</b>	<b>21</b>	<b>24</b>	<b>25</b>
25,000 and under	19	20	20	20	24	24
25,001-50,000	18	20	24	20	21	23
50,001-100,000	20	29	32	21	28	33
100,001-200,000	23	33	31	28	29	24
200,001+	29	30	32	32	33	28

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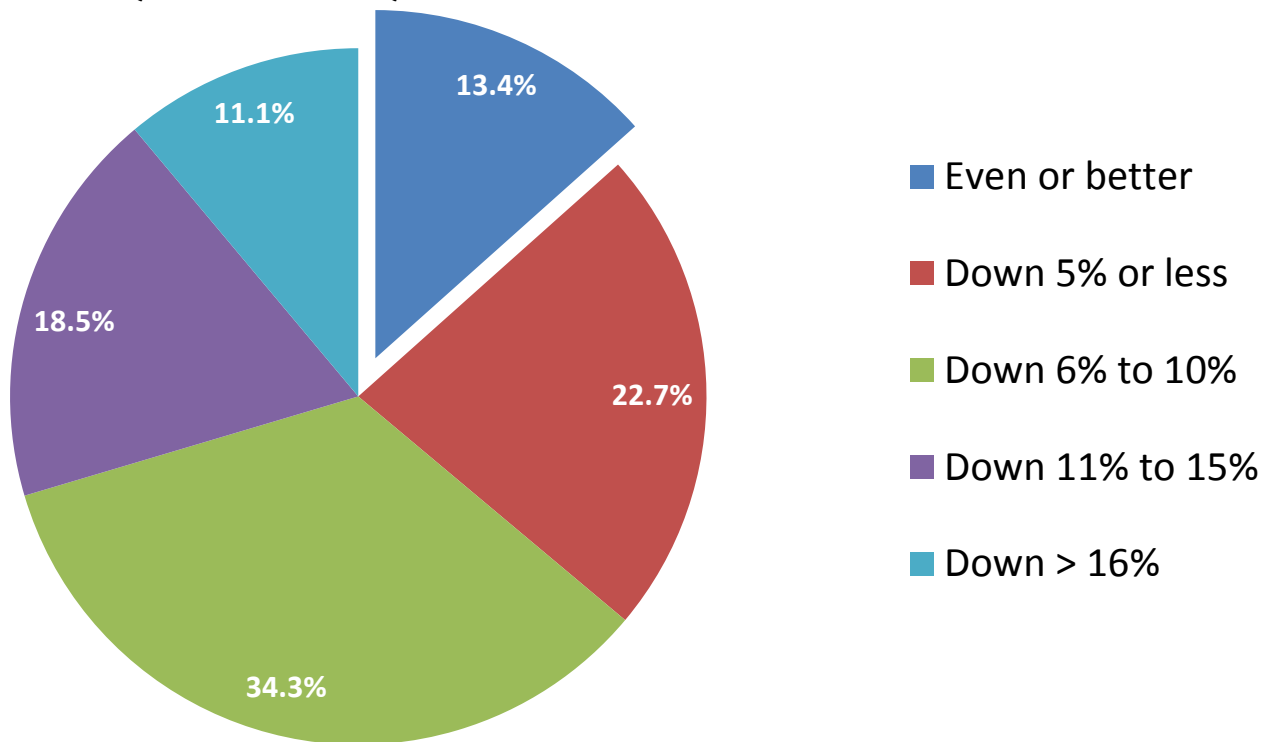
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# Single Copy Snapshot

## Daily single-copy sales:

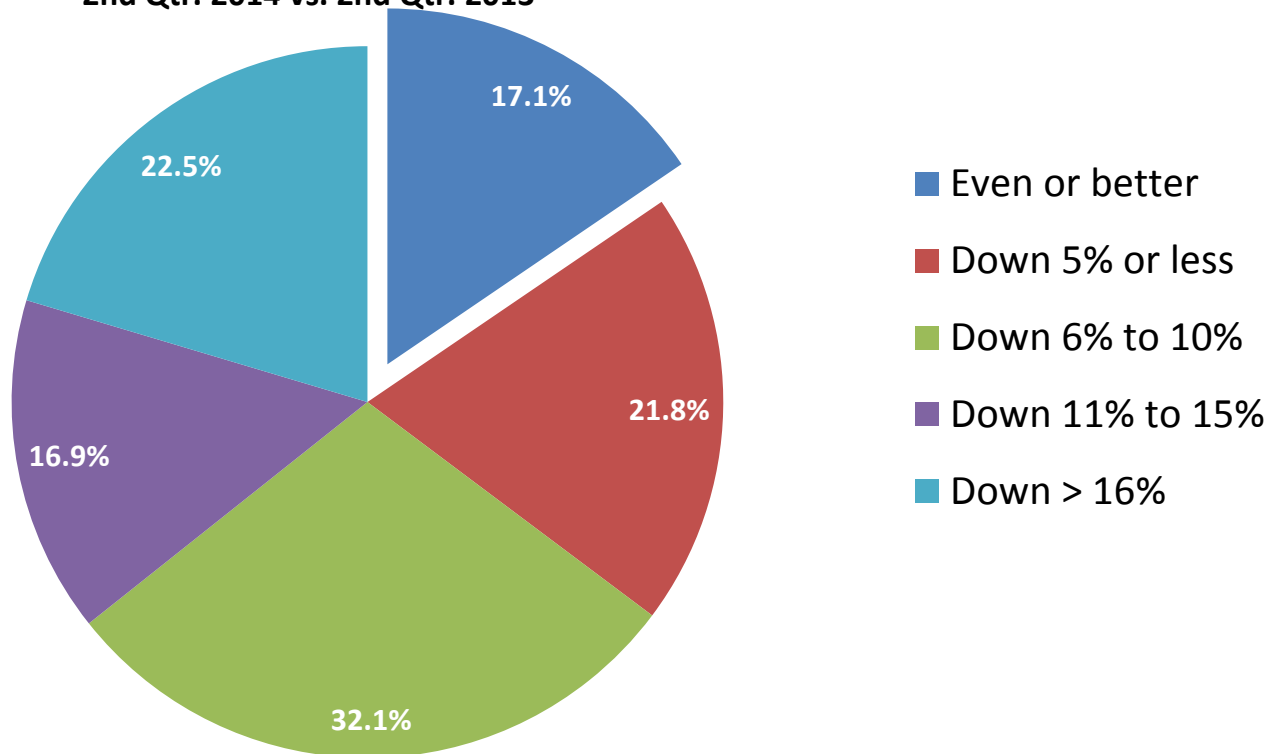
2nd Qtr. 2014 vs. 2nd Qtr. 2013



# Single Copy Snapshot

## Sunday single-copy sales:

2nd Qtr. 2014 vs. 2nd Qtr. 2013





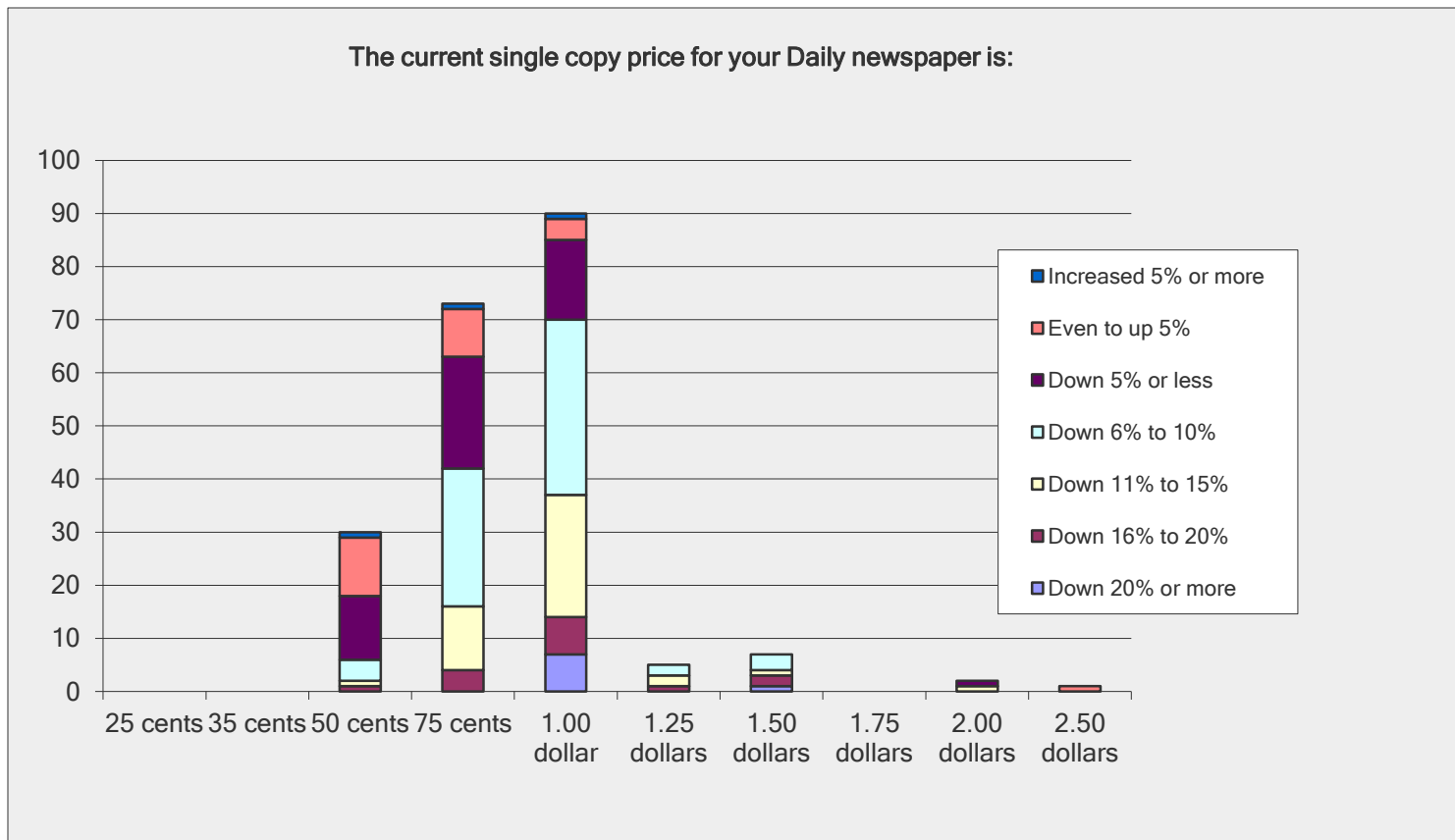
## Single Copy Snapshot

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- 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



# Single Copy Snapshot

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- ✓ 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.



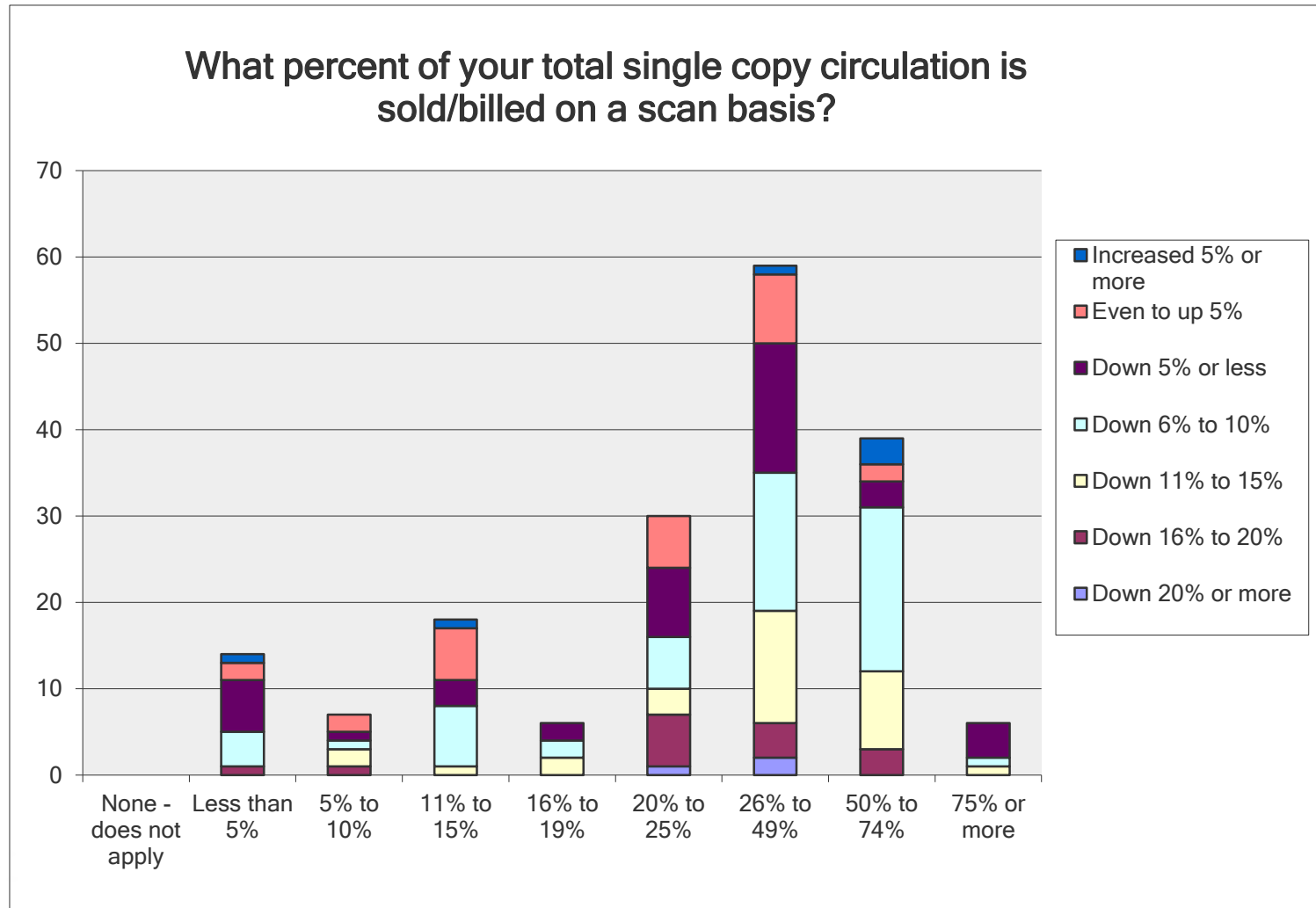
# Single Copy Snapshot

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- ✓ 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.

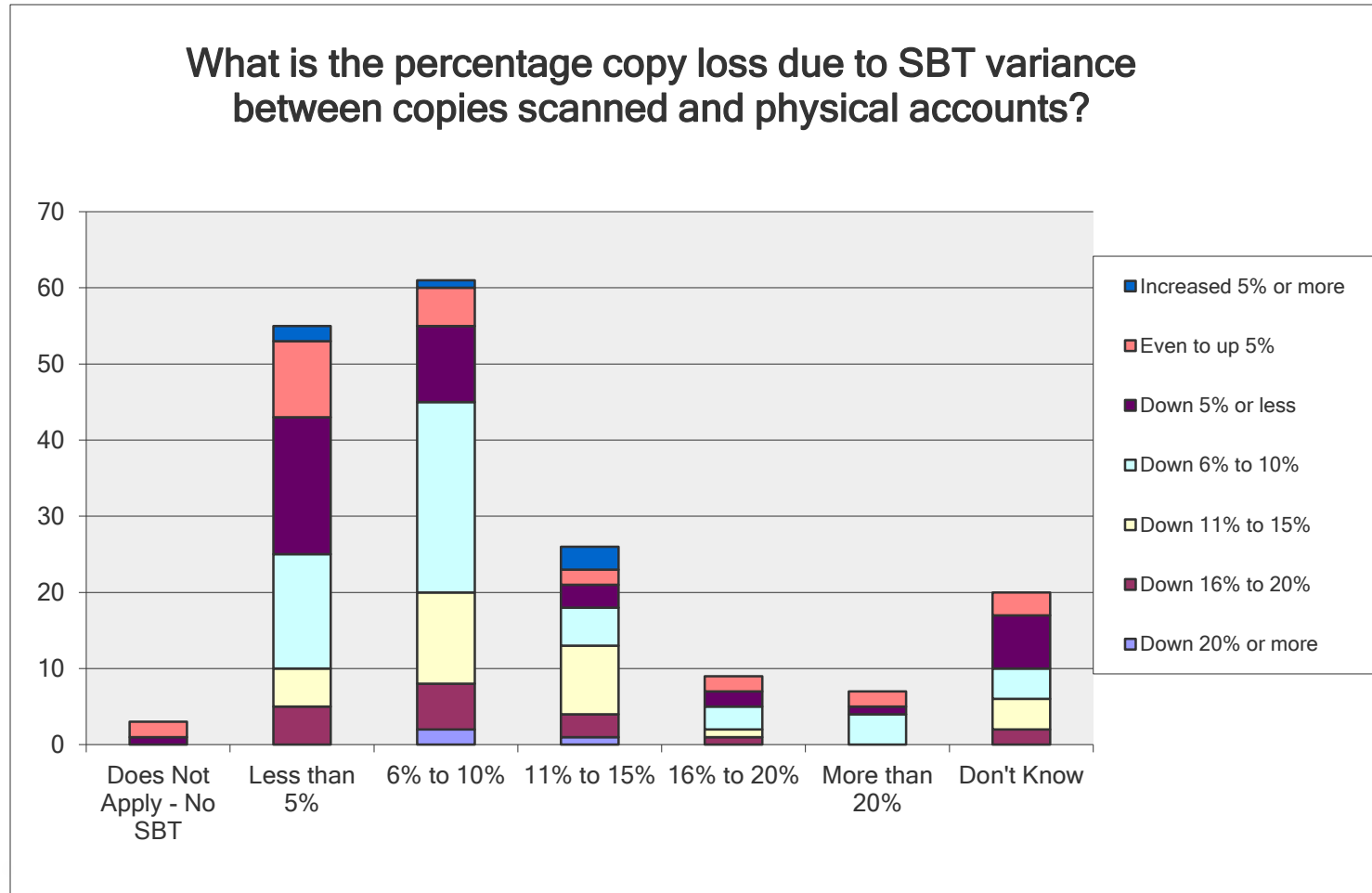


# Scan Based Management





# Scan Based Management



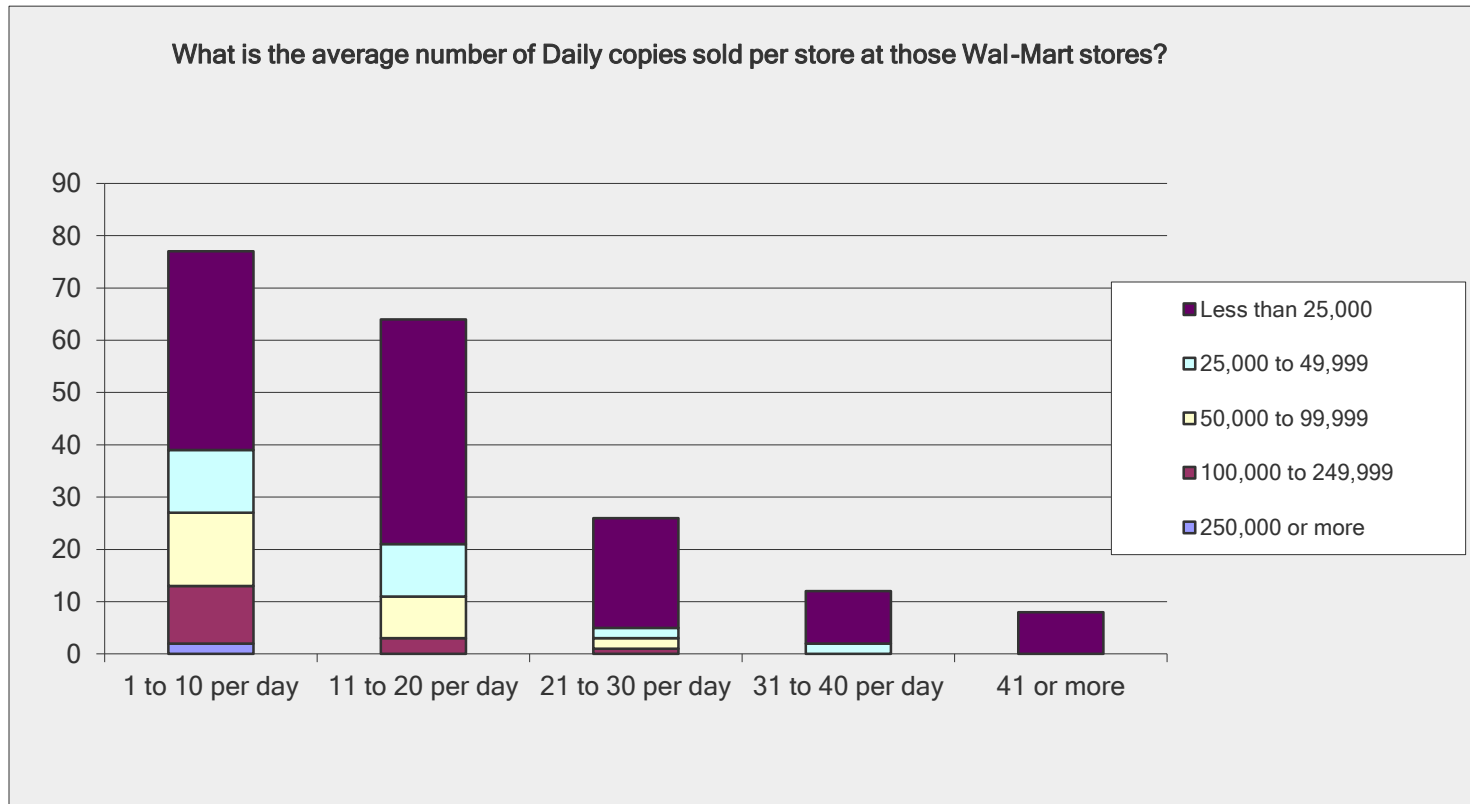
# Single Copy Snapshot



- ✓ 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.



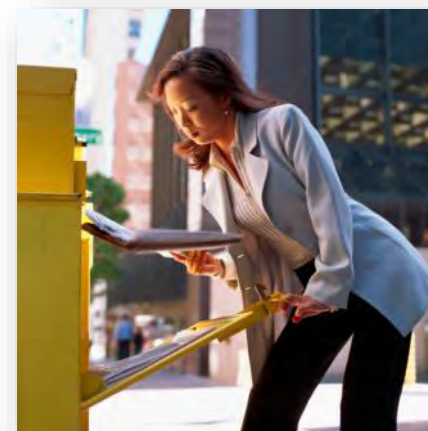


## 2015 Circulation Strategies: Building the New Business Model

# 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



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# How Albuquerque Journal phased out its news racks

Newspaper shares lessons learned from its test and process

- The [Albuquerque Journal](#) recently made the move amid declining rack sales
- Three years ago, the newspaper had more than 1,000 racks. Chipping away at its least profitable racks, it had 500 left by the start of this year. After further assessment, it decided to wrap up the rack service.
- Launched an 8-week test in a district. Eliminated the racks to gauge the effect on sales at existing retail locations, such as diners, as well as the response from consumers and vendors. Results showed a 10-15 percent lift in retail sales.





...cont.

- June 1. Phased out 125 racks a week for four weeks. Still maintains a handful of racks on a military base and some in rural areas.
- The newspaper opened over-the-counter sales at 50 retail locations and plans to add another 50 and started selling single copies in a non-traditional way at retail locations.
- Sells a bulk amount at a reduced rate, no return copies. Reduces overhead costs in terms of picking up return copies, among other things.
- Example: the nine IHOP locations in the metro area went from an average of 146 sales in racks to 750 single copies over the counter on a Sunday. Customer convenience is the key factor.



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## 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>
25,000 and under	124	90	80
25,001-50,000	412	393	261
50,001-100,000	585	701	480
100,001-200,000	1,340	1,366	1,135
200,001+	2,301	3,000	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>
25,000 and under	128	96	80
25,001-50,000	409	381	253
50,001-100,000	577	667	503
100,001-200,000	1,469	1,509	1,076
200,001+	2,382	3,322	2,428



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# Retailing the Newspaper

Trend: Mean percentage of Daily Single Copy Sales Sold OTC Retail Locations			
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

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# Retailing the Newspaper

Trend: Mean percentage of Daily Single Copy Sales Sold Through Newsracks			
Q.39	2014	2011	2008
	%	%	%
<b>Industry</b>	<b>20</b>	<b>26</b>	<b>33</b>
25,000 and under	27	28	36
25,001-50,000	11	26	27
50,001-100,000	15	22	34
100,001-200,000	16	23	28
200,001+	11	25	31

NAA 2015 Circulation Facts, Figures & Logic



# Retailing the Newspaper

Trend: Mean percentage of Sunday Single Copy Sales Sold OTC Retail Locations			
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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# Retailing the Newspaper

Trend: Mean percentage of Sunday Single Copy Sales Sold Through Newsracks			
Q.39b	2014	2011	2008
	%	%	%
<b>Industry</b>	<b>15</b>	<b>20</b>	<b>26</b>
25,000 and under	21	24	33
25,001-50,000	7	17	21
50,001-100,000	10	13	23
100,001-200,000	9	11	18
200,001+	4	11	12

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2015 Circulation Strategies: Building the  
New Business Model

# Retailing the Newspaper

Trend: Charge Premium On Holiday				
	Thanksgiving			Other Holiday
Q.36e	2014	2011	2008	2014
	%	%	%	%
<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

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# Retailing the Newspaper

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



## 2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Employees Dedicated to Single Copy Distribution Full-Time			
	2014	2011	2008
Q.44d	#	#	#
25,000 and under	1	1	1
25,001-50,000	1	2	2
50,001-100,000	2	2	3
100,001-200,000	2	4	6
200,001+	5	7	10
<b># of hours worked</b>	<b>2014</b>	<b>2011</b>	<b>2008</b>
Q.44d	#	#	#
25,000 and under	50	50	40
25,001-50,000	73	80	98
50,001-100,000	132	138	120
100,001-200,000	88	160	225
200,001+	150	250	360

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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

Trend: Sales Per Outlet of Daily Newspaper				
Newsracks				
	2014	2011	2008	
Q.39c	#	#		
<b>Industry</b>	<b>5</b>	<b>5</b>	<b>5</b>	
25,000 and under	8	6	7	
25,001-50,000	2	4	5	
50,001-100,000	3	3	4	
100,001-200,000	4	4	5	
200,001+	2	3	3	
Trend: Sales Per Outlet of Sunday Newspaper				
Newsracks				
	2014	2011	2008	
Q.39c	#	#	#	
<b>Industry</b>	<b>4</b>	<b>6</b>	<b>5</b>	
25,000 and under	5	7	7	
25,001-50,000	2	7	5	
50,001-100,000	5	4	5	
100,001-200,000	5	5	4	
200,001+	2	3	3	





## 2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Trend: Return Per Outlet of Daily Newspaper			
Newsracks			
	2014	2011	2008
Q.39d	#	#	#
<b>Industry</b>	<b>4</b>	<b>4</b>	<b>2</b>
25,000 and under	5	5	3
25,001-50,000	2	3	2
50,001-100,000	4	3	2
100,001-200,000	2	3	2
200,001+	2	6	2
Trend: Return Per Outlet of Daily Newspaper			
OTC			
	2014	2011	2008
Q.39d	#	#	#
<b>Industry</b>	<b>4</b>	<b>5</b>	<b>4</b>
25,000 and under	5	6	4
25,001-50,000	4	4	3
50,001-100,000	3	5	3
100,001-200,000	3	4	3
200,001+	3	5	3



## 2015 Circulation Strategies: Building the New Business Model

# Retailing the Newspaper

Trend: Return Per Outlet of Sunday Newspaper			
Newsracks			
	2014	2011	2008
Q.39d	#	#	#
Industry	3	4	2
25,000 and under	4	4	3
25,001-50,000	2	3	2
50,001-100,000	3	4	2
100,001-200,000	2	3	2
200,001+	2	6	2
Trend: Return Per Outlet of Sunday Newspaper			
OTC			
	2014	2011	2008
Q.39d	#	#	#
Industry	6	6	5
25,000 and under	6	6	4
25,001-50,000	6	6	4
50,001-100,000	6	7	5
100,001-200,000	7	5	6
200,001+	6	8	6



# Retailing the Newspaper

Median Sellout percentages for Daily and Sunday Editions			
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



# Retailing the Newspaper

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



# Retailing the Newspaper

Trend: Median Return percentages for Daily Editions -Total Combined			
	2014	2011	2008
Q.37a	%	%	%
<b>Industry</b>	<b>30</b>	<b>26</b>	<b>25</b>
25,000 and under	28	25	25
25,001-50,000	31	28	25
50,001-100,000	31	29	25
100,001-200,000	30	30	25
200,001+	34	27	26

NAA 2015 Circulation Facts, Figures & Logic



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

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





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# The Total Value Proposition...



When you read The Enquirer, you  
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# Develop those retailer partnerships...



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# Develop those retailer partnerships...

**A little power reading  
to go along with your  
power tools.**

 The Sunday Chicago Tribune  
is now available at Chicagoland  
Home Depot locations.

  
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# The Sunday Single Copy Buyer

- They are younger, earn a good living and shop for value.

Age	Subscribers	Single Copy
18-34	13.8%	<b>31.4%</b>
35-54	33.4%	<b>41.3%</b>
55 & over	52.7%	<b>27.3%</b>
Employed F.T.	40.1%	<b>47.6%</b>
Wal-Mart (past 30 days)	47.4%	<b>56.2%</b>
Target (past 30 days)	42.8%	<b>40.7%</b>



# The Single Copy Buyer: An Opportunity to Build Store Traffic

**Newspapers Are a Destination Item and Single Copy Buyers are Dedicated Newspaper Readers.**

- ✓ More than eight of ten say they decided to buy before entering the store.
- ✓ Reading a Sunday newspaper in many households is a ritual and the decision to purchase a Sunday newspaper is more often made in advance. Nearly 9 in 10 (87%) Sunday buyers said the decision to buy a Sunday newspaper is made in advance.
- ✓ They have money to spend. Sunday Store Spending: On Sundays buyers spent an average of \$15.20 when getting a newspaper, including \$23.00 at grocery stores and \$6.90 at convenience stores.

**Newspapers Buyers Can be Loyal Consistent Customers: They are loyal to the retailers where they buy their newspaper.**

- ✓ Almost two-thirds (64%) usually or nearly always buy the paper at the same store.
- ✓ Readers are regular buyers the average is 4.2 weekdays out of six issues and two-thirds (67%) of Sunday buyers said they usually buy four issues every month.



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Mori Research: NAA Single Copy Buyer Study

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# Single Copy Purchasers Buy the Newspaper for the Advertising

- ✓ The MORI Single Copy study states: “Advertising, more than news, is the reason most 18-34 buyers for buying the Sunday newspaper”.
- ✓ Half of 18-34 buyers (50%) said reading the news in general is a reason they bought a Sunday paper and 68% cited a news category, but 86% named one of the three advertising categories.
- ✓ The advertising categories measured lead all of the news categories measured with the exception of reading the news in general.



## Summary:

Single Copy Buyers should be more frequent shoppers at your store.  
Let's give them another reason to visit you more often.

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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
- The Role of Audience and Circulation in Building a Sustainable Business Model
- Marketing to the Occasional Reader
- **Telling your newspaper's story**
- Summary: Identifying the priorities



# Building the Sustainable Business Model

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Summary...

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

An Audience Metrics Update



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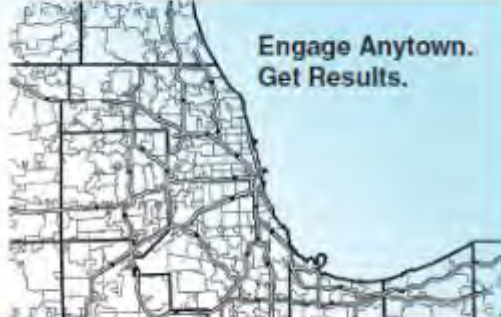
# AAM Changes: An Obligation and an Opportunity

**Adviser for  
Public Media**

**Consolidated Media Report** **Anytown News Group**

4 quarters ended March 31, 2015  
Subject to Audit

Anytown, CT



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Anytown and surrounding Anytown News Group service areas provide comprehensive content to consumers along with targeted advertising, media and business services to advertisers. Our media portfolio delivers customized solutions that align with your needs — helping your business to achieve results.

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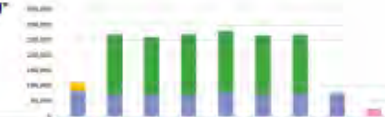
**PRINT**

**Anytown News Group** 4 quarters ended March 31, 2015  
Subject to Audit

**PUBLISHING PLANS**

<b>Anytown News</b>	Printed daily, Monday through Friday, except on days when the newspaper is closed for publication. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT.
<b>Anytown Direct</b>	Printed daily, Monday through Friday, except on days when the newspaper is closed for publication. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT.
<b>Anytown Town News</b>	Printed daily, Monday through Friday, except on days when the newspaper is closed for publication. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT.
<b>Municipal News</b>	Printed daily, Monday through Friday, except on days when the newspaper is closed for publication. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT. The newspaper is published at the Anytown News Group office in Anytown, CT.

**CIRCULATION\***



Month	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Anytown News	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Anytown Direct	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Anytown Town News	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Municipal News	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
<b>Total Circulation</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>	<b>400,000</b>

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March 2015



Alliance for Audited Media:

# Update and a Path Forward

Quarterly Data Report  
Q1 2015

Page: 1 of 3 Automatic Zoom

Alliance for Audited Media  
TRANSPARENT WITH TRUST

**Consolidated Media Report**

1 Quarter ending March 31, 2015  
*Subject to Audit*

CAPE COD MEDIA GROUP

Chicago Sun-Times-Del Norte	Wrapparts, LLC	Chicago	IL	AP	AAM	03/2014-AR	2,661
Chicago Sun-Times-Buffalo Grove Countryside	Wrapparts, LLC	Chicago	IL	AP	AAM	03/2014-AR	1,799

Start | Internet Explorer | Google Chrome | Firefox | Microsoft Edge | Word | PowerPoint | Outlook | 10:27 AM 6/9/2015



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

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- Telling your newspaper's story
- Summary: Identifying the priorities





## 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.

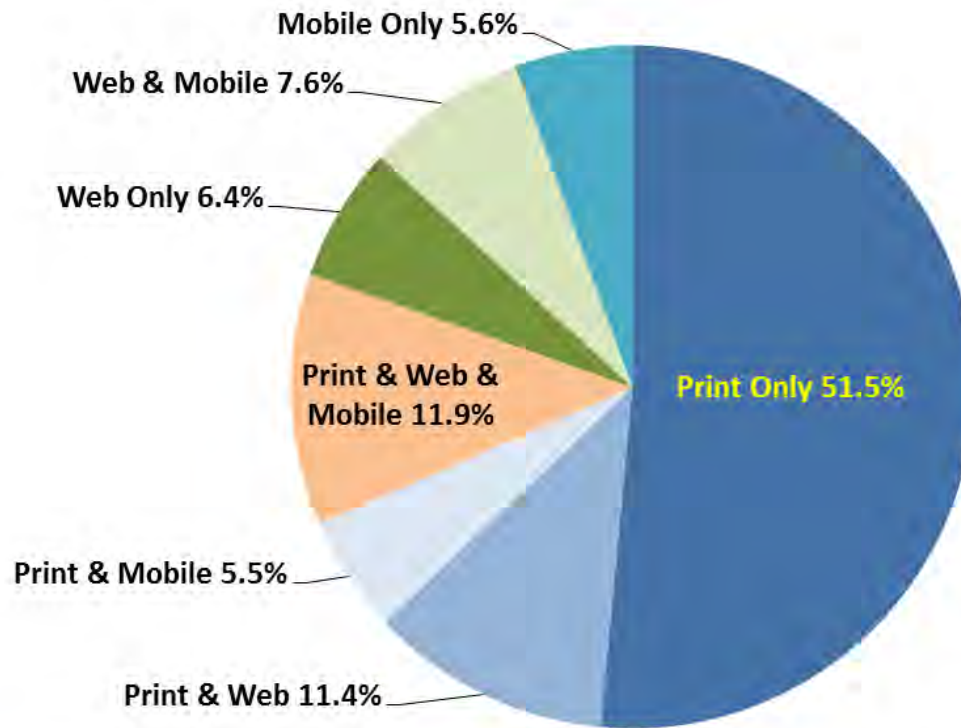


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## Audience Development: Focus on Opportunities to Engage Readers...

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



Source: Nielsen Scarborough, Release 2, 2014



# SUMMARY:

## Building the Sustainable Business Model

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

# **Focus on Audience and New Revenue**

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ONA's  
"Retail Revenue & Sales  
Strategies



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Circulation Strategies for Building the New  
Business Model: :

# **Focus on Audience and New Revenue**

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Thank you.



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