



NEWSPAPER ASSOCIATION OF AMERICA
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Mather Economics Symposium

November 2014



Benchmarking the
New Business Model:

**Focus on Audience
and
New Revenue**



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Building the Sustainable Business Model

New Revenue Streams:

The Value of Content



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Focus on Audience and New Revenue:

What's Working...

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



Business Model Evolving, Circulation Revenue Rising

- Circulation revenue for U.S. newspapers recorded a second consecutive year of growth, rising 3.7% to \$10.87 billion in 2013
- Total revenue for the multiplatform U.S. newspaper media business amounted to \$37.59 billion in 2013, a slight decline from \$38.60 billion in 2012.

Table: 2013 Newspaper Media Revenue

	\$ Billions	Pct. Change
Total Revenue	\$37.59	-2.60%
Advertising Revenue	\$23.57	-6.50%
<i>Newspaper Print</i>	<i>\$17.30</i>	<i>-8.60%</i>
<i>Digital Advertising</i>	<i>\$3.42</i>	<i>1.50%</i>
<i>Direct Marketing</i>	<i>\$1.40</i>	<i>2.40%</i>
<i>Niche/Non-Daily</i>	<i>\$1.45</i>	<i>-5.80%</i>
Circulation Revenue	\$10.87	3.70%
New/Other Revenue	\$3.15	5.00%



Three Successful Circulation Strategies:

- **Improve Operational Effectiveness**
- **Circulation Revenue Strategies**
- **Audience Development**



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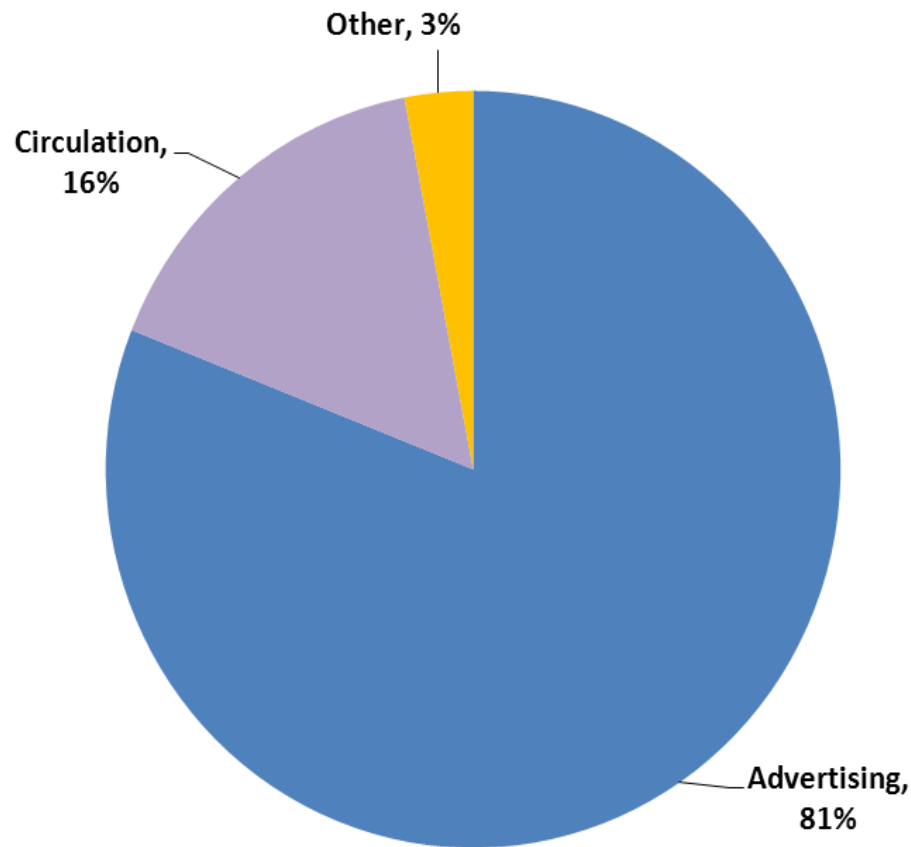
New Revenue Streams

- Paid Digital Content
- Digital & Marketing Services
- Event Marketing
- Goin' Mobile
- Native Advertising

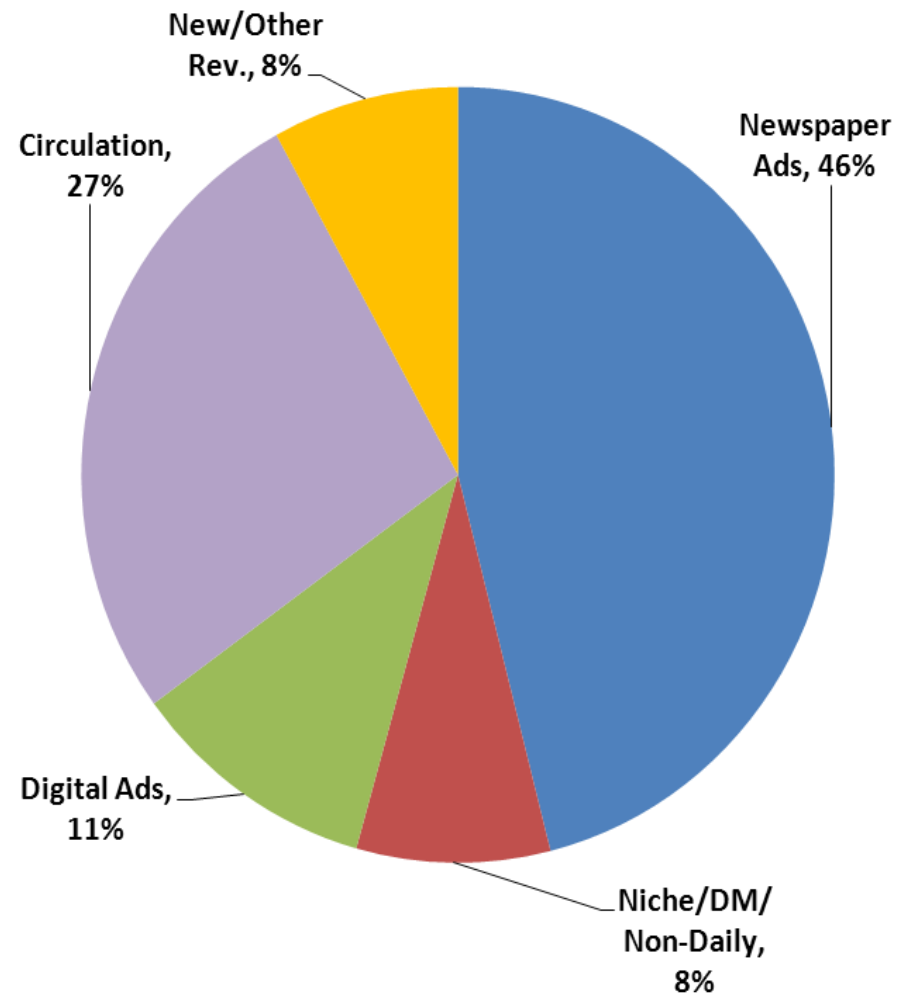


Newspaper Media: Changing Revenue Stream

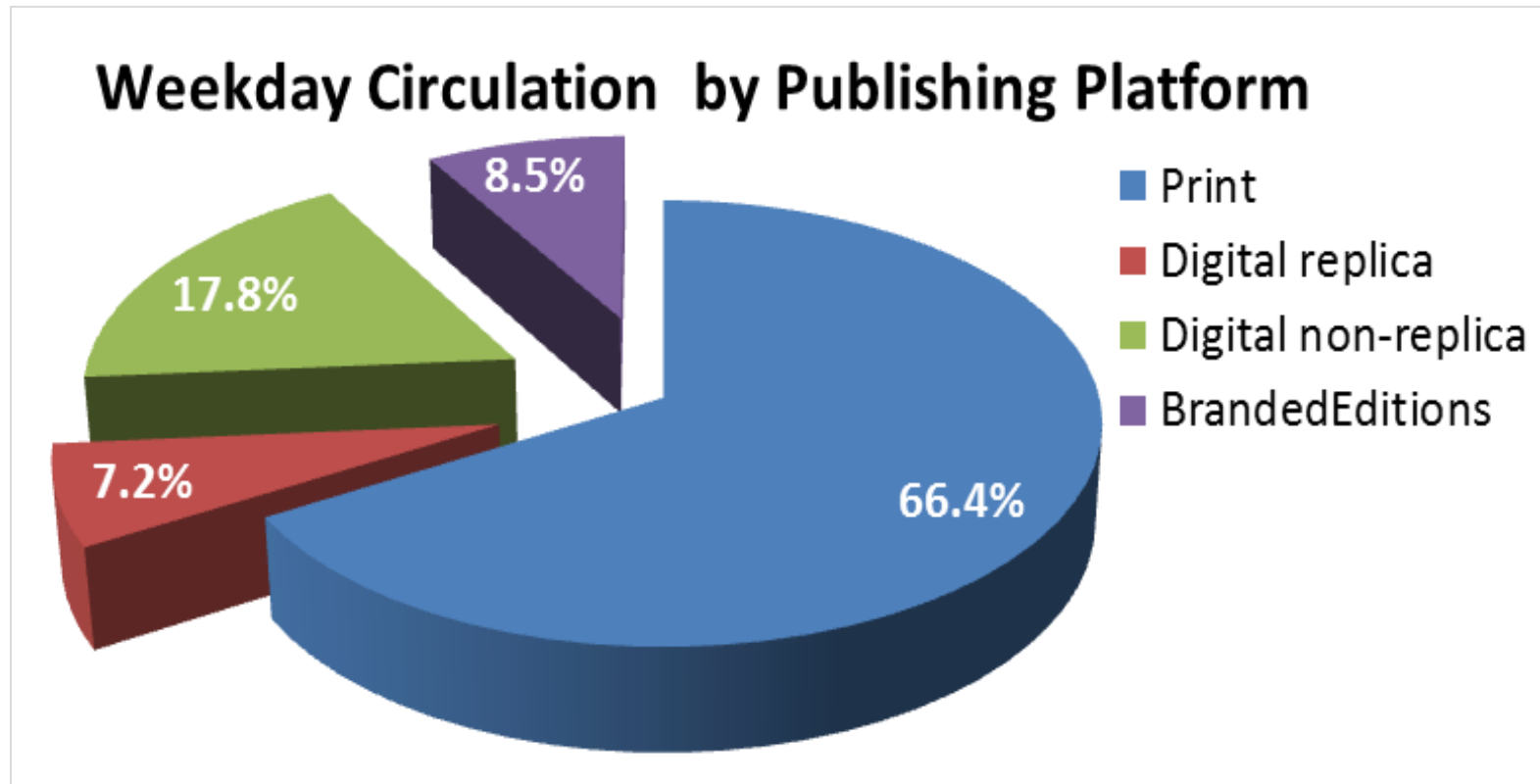
Revenue Composition 2007



Revenue Composition 2012



Two thirds of total daily circulation is traditional print



Counting Copies: A Look at Circulation Changes

- Paid print circulation comprised 73.2 percent of total reported Sunday circulation.
- Digital circulation increased to 17.2 percent of total circulation during this reporting period compared to 11.9 percent last year.
- Digital replica comprised 4.8 percent of total circulation compared to 4.1 percent last year.
- Digital non-replica circulation accounted for 12.4 percent of total Sunday circulation. It was 6.9 percent for the same six months in 2013.
- “Branded Print and Digital” increased to 15.9 percent of Sunday circulation, up from 10.1 percent last year.



Today's Newspaper Audience



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The Digital Audience



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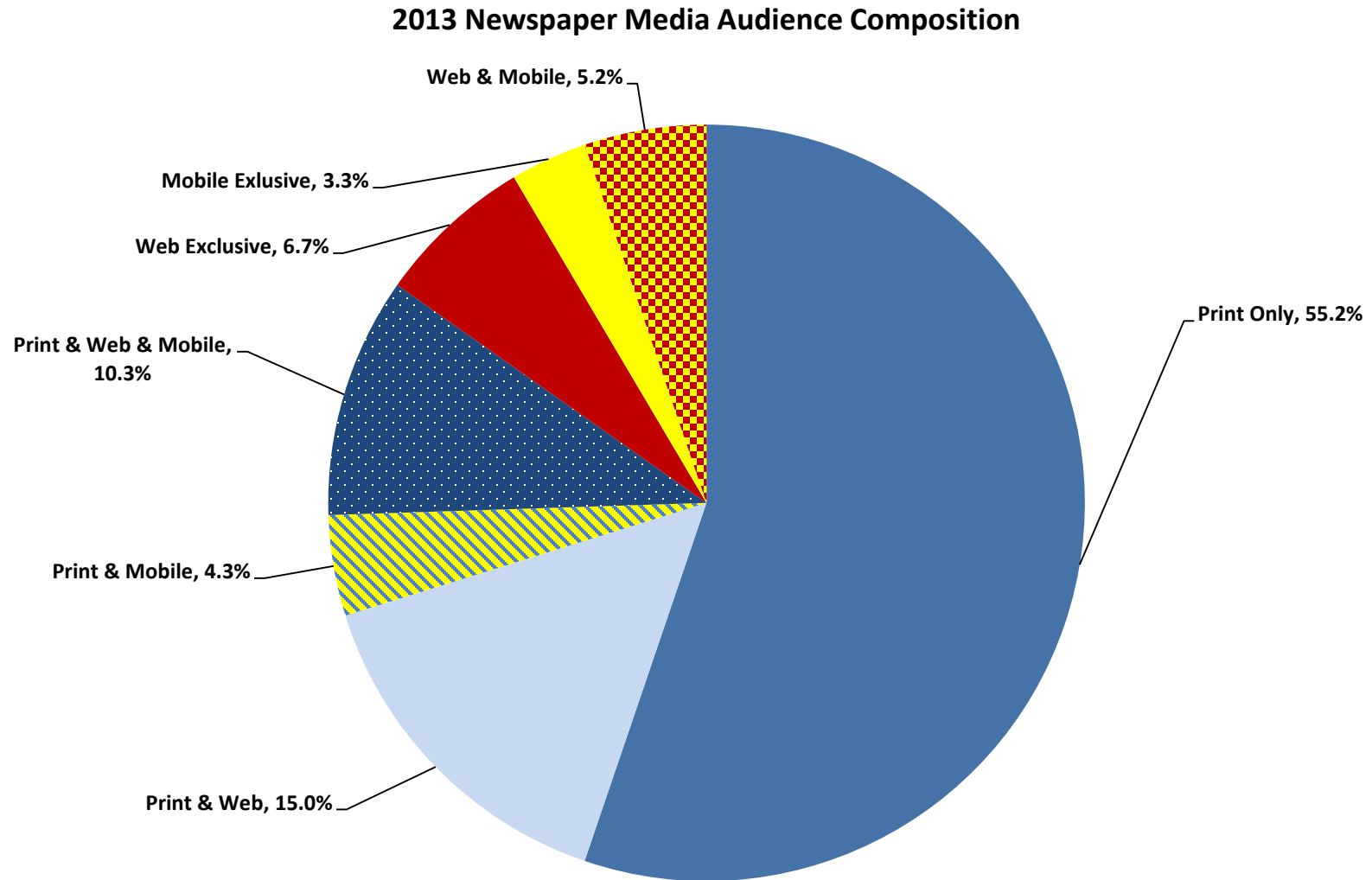
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Goin' Mobile



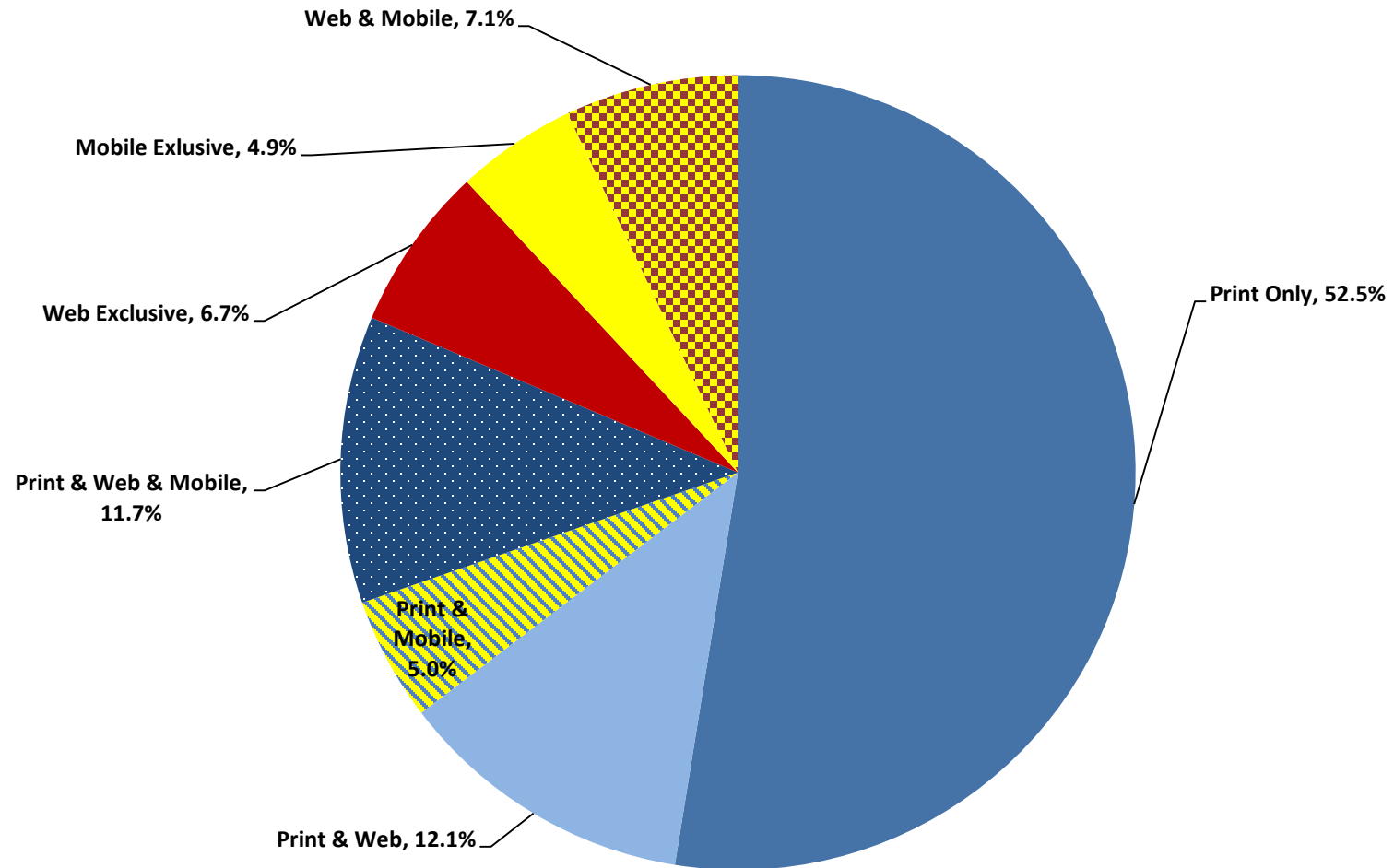
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Opportunities to Engage Readers



Opportunities to Engage Readers

2014 Newspaper Media Audience Composition



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%
<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%



Explosive Growth in Mobile Devices

- 90% of American adults have a cell phone
- 63% of American adults have a smartphone
- 42% of American adults own a tablet computer
- 32% of American adults own an e-reader



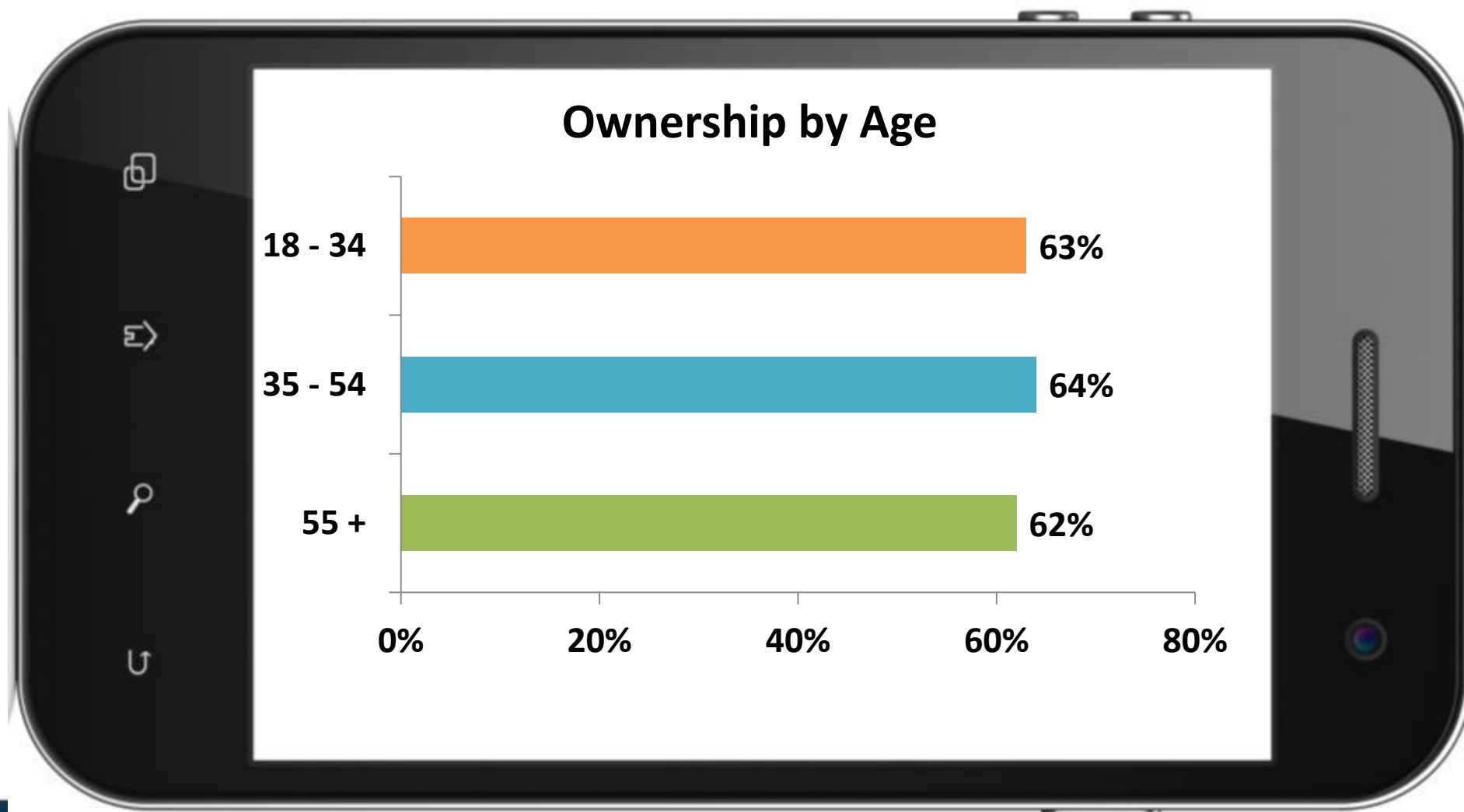
Source: Pew Research, 2014



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Surge in Smartphones



Source: Reynolds Journalism Institute, May 2014



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Explosive Growth in Mobile Devices

- Apple sells 9 million new iPhones in first 3 days
- 63% of adult cell owners use their phones to go online
- 34% of adults own a tablet (June 2013)
- Tablet sales forecast to exceed desktop/laptop sales in Q4



Millennials

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



Millennial readers* are active consumers:

- 3.5 mm, new car in next year
- 4.3 mm, Europe trip (past 3 yrs.)
- 28.4 mm, consumer electronics store (past yr.)
- 35.1 mm, major dept. store (past month)

* Print, Mobile or PC Web newspaper media usage

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



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Boomers

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



Boomer readers* are active consumers:

- 40.9 mm, IRA, 401K or Savings account
- 27.9 mm, home improvement (past yr.)
- 46.4 mm, Rx drugs (past yr.)

* Print, Mobile or PC Web newspaper usage

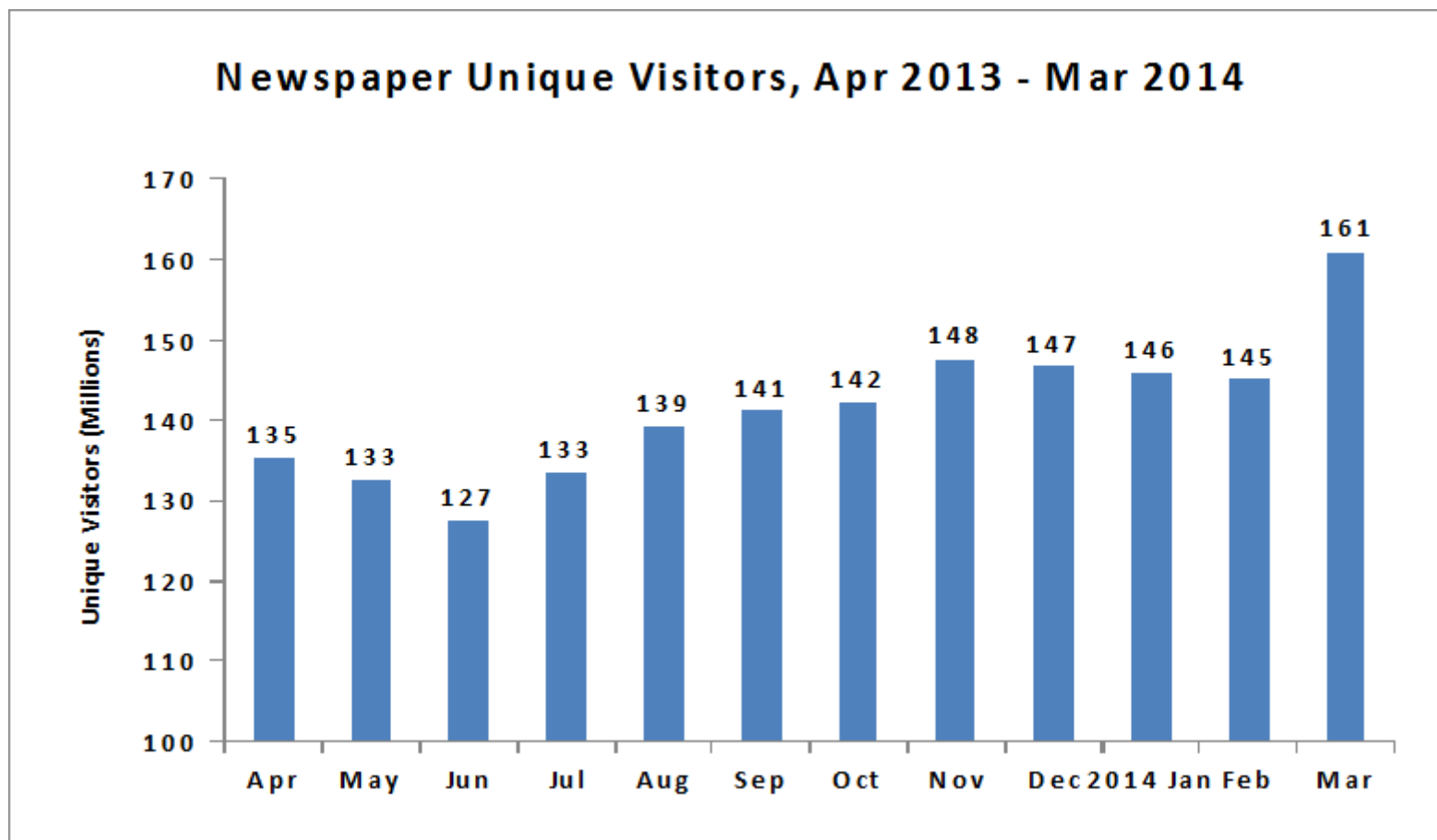
Source: Scarborough, 2013; Adult 45-64 pop 77.8 million



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Newspaper digital media reached nearly 8 in 10 online adults in the U.S. last month.



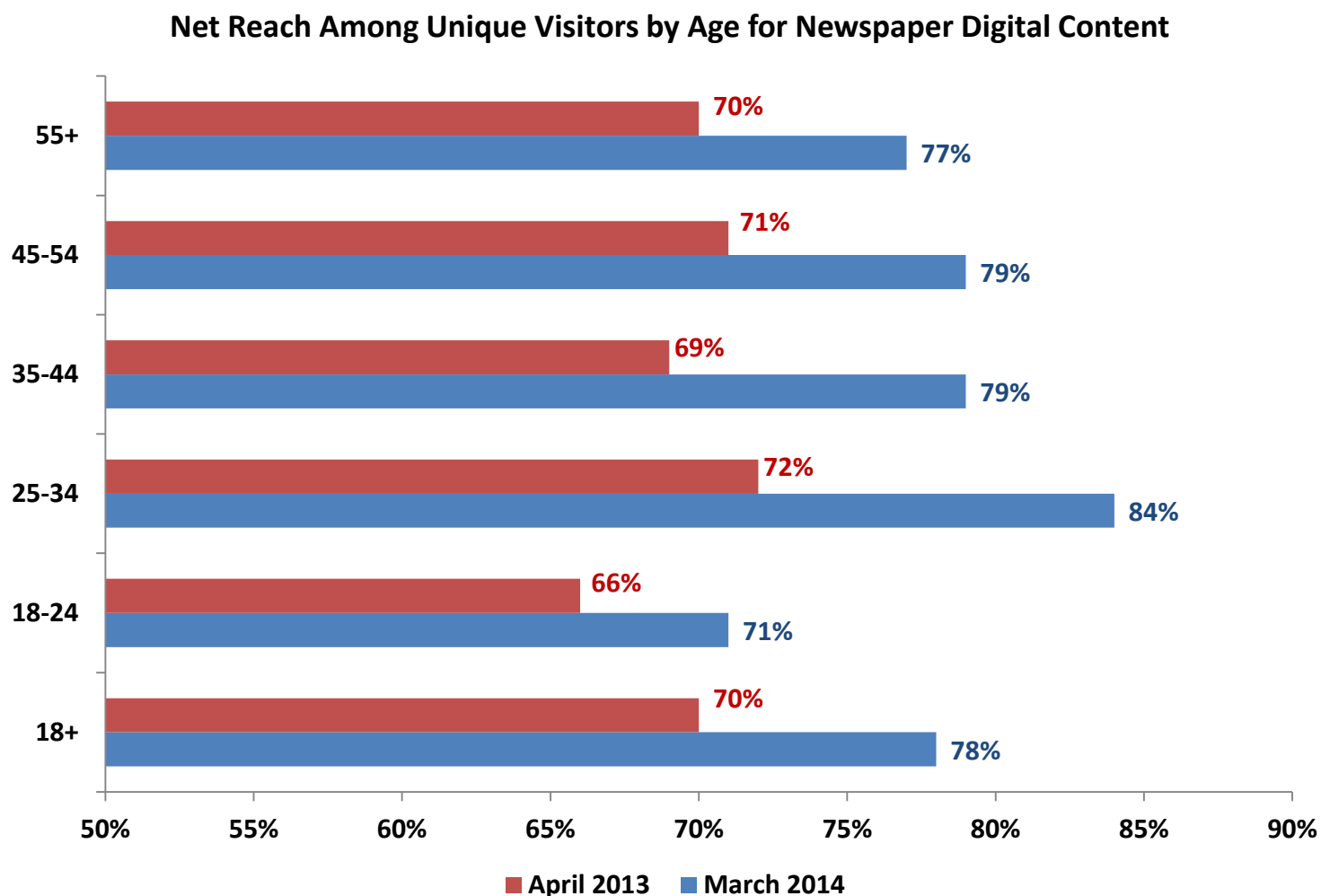
Mobile Drives Audience Up

Percent Change in Unique Visitors Engaged With Newspaper Digital Content By Age & Device Type, Apr. 2013 - Mar. 2014

Age	Net Change	Mobile & Desktop or Laptop Only		
		Desktop or Laptop Only	Mobile & Desktop or Laptop	Mobile Exclusive
18-24	19%	-30%	72%	146%
25-34	22%	-24%	62%	103%
35-44	19%	-18%	52%	82%
45-54	18%	-3%	45%	59%
55+	17%	2%	42%	37%



Reach Increased for All Age Groups



Source: comScore



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Building the Sustainable Business Model

New Revenue Streams:

The Value of Content



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The Dilemma:

- Sunday Circulation is very profitable
- A few other days bring additional ad revenue
- The rest of the days... increasingly difficult to monetize with advertising



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The image shows a collection of newspaper clippings and advertisements. The most prominent one is from the 'strib' (St. Paul Pioneer Press) with the headline 'Following his heart' and a photo of a man with a beard. Other clippings include 'China', 'RUSTY', 'RED CHECK', 'MEXICAN MONKEY', and 'What'.

AN EDITION OF THE *Austin American-Statesman* SUNDAY, SEPTEMBER 1, 2013

A photograph of three children standing against a blue background. On the left is a girl with curly brown hair wearing a red and white horizontally striped t-shirt. In the center is a boy with short dark hair wearing a white t-shirt with a yellow 'The Simpsons' logo. On the right is a girl with long dark hair wearing a white t-shirt with a red and yellow 'The Simpsons' logo and holding a brown coconut.

Stones Keanu flexes shoes up in Kendall Kidswear from Kim Rodriguez and Laura Dooley and in Laura Beck's Striped Shirt. Accessories with floral bracelets from Megan Devetti's All Dotted Up, and find cute, sexy girl's shoes in Tina Hamblly's Valentinas. Teens can put on a pair of boots made by Allan Weinberger at Austin Custom Boots. And don't forget Blue Avocado's line of lunch bags recycled from plastic bottles, especially the new line designed by Austin's Ross Bennett. Blue Avocado was started by three Austin moms: Paige Davis, Amy George and Melissa Nathan.



9. **Play with color.** On Alyssa, Eleventy-Five Tulip shirt, \$26. On Anika, Eleventy-Five Here Kitty shirt, \$26.



Roar into new year. On Lukas, Dinosaur Hoodie by Eile Dee Designs, \$30, and BabyBolt Banjo shirt, \$26. On Enzo, Kelly D Tees Camper shirt, \$36.



Instant message. On Avery, Owleyes Tee Shirts' "Spoken For" shirt, \$39. On Paul, "Expand Your Mind" shirt by Kelly D Tees, \$20.



Patterns On Kona, Gabby dress by Elle Dee, \$45; and Maggie boots by Valentina, \$76. On Julian, Mikee shirt in helicopters by Tess for Tots, \$45



Stripes. On Lukas, red and black shirt, \$19.50. On Enzo, Baby Soft striped Mod Scooter shirt, \$26. On Hana, Custom Touch Sewing ruffle dress, \$26; and Katie shoes by Valentina, \$44.

By Michael Barnes
mbarnes@tst.af.mil

You could spend the s

evening of Sept. 6 at the Driskill Hotel, attending Austin's high-dollar, blue-gala, Fête, followed by an energy, less expensive sidewalk party, Fête-ish (go to balletaustin.org/fete for flut shall we be more creative).

Start the evening, instead three blocks away at the crest **Midnight Cowboy** E. Sixth St., 512-843-2715, shrine to cocktail culture disguised and virtually sales, right in the middle of Sixth Street's otherwise erotic action. Advance re-

■ If you have quest

tions and speaky-like directions are required. Once inside the Holy of Holies, however, you will receive the exquisite attention at one of a handful of tables. Mixologists roll out the ingredients and explain the history and methods for putting together each delicious concoction. Try the classic, slightly bitter negroni (\$12).

Then stroll down the block for a light dinner at **Parkside** (201 E. Sixth St., 512-474-9889). This hustrous culinary retreat adds a much-needed dash of class to Sixth Street. Chef Silvano Cirikel loves to innovate, but one can't easily stick to the raw bar and attendant tasty appetizers. If the place

comments or prefer not to respond.

is packed, stake out a spot at the bar. Not only do the brainy bartenders deliver food to you quickly, the people-watching is not to be missed. Share the braised Hill Country rabbit (\$24).

Save room for dessert? Can't do better than **1886 Bakery** Cafe two blocks to the west inside the venerable Driskill (116 E. Sixth St., 512-479-1234). Here, the luscious pies and pastries roll out of the kitchen like so many *focaccia* seductions. The atmosphere takes the guest back to an era when every street and hotel room was a reasonably priced cafe for downtown workers and just plain passersby. Sit outside on

Receive Shopping Today, email



the formal deck, or inside the elaborate hotel lobby, then order the 1896 chocolate cake (\$9) or hot fudge sundae (\$6).

Now it's time to party.

Well in advance, reserve your seats for the show's youthful **Post-18s** updates

at the Driskill. Social leaders in gowns will frolic alongside club kids and the company's own exquisites dancers. Plus, the money (\$125 a ticket) goes to support Austin's most lauded dance troupe. Play out the evening here.

■ If you have questions, comments or prefer not to receive Shopping Today, email shoppingtoday@statesman.com or call 855-709-0035.

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Marketing Digital Content and the Revenue Possibilities...



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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.

Get Digital Access



New Revenue Streams: Paid Digital Content

The Augusta Chronicle

All-Access Membership

The Augusta Chronicle's new membership plan provides you with all access to all content on all platforms - print, online, mobile phones, tablet devices and e-editions.

[LEARN MORE](#) [JOIN NOW](#)

*Optimized for Firefox, Internet Explorer and Chrome browsers

ALL-ACCESS for current print subscribers	ALL-ACCESS <small>NEW VALUE</small> for those who need it all	DIGITAL only our full digital suite
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<p>Included in your current print subscription</p> <p>ACTIVATE</p>	<p>Sunday+ Digital starting as low as</p> <p>\$11⁶³ per month</p> <p>JOIN NOW</p>	<p>\$16⁰⁰ per month</p> <p>JOIN NOW</p>

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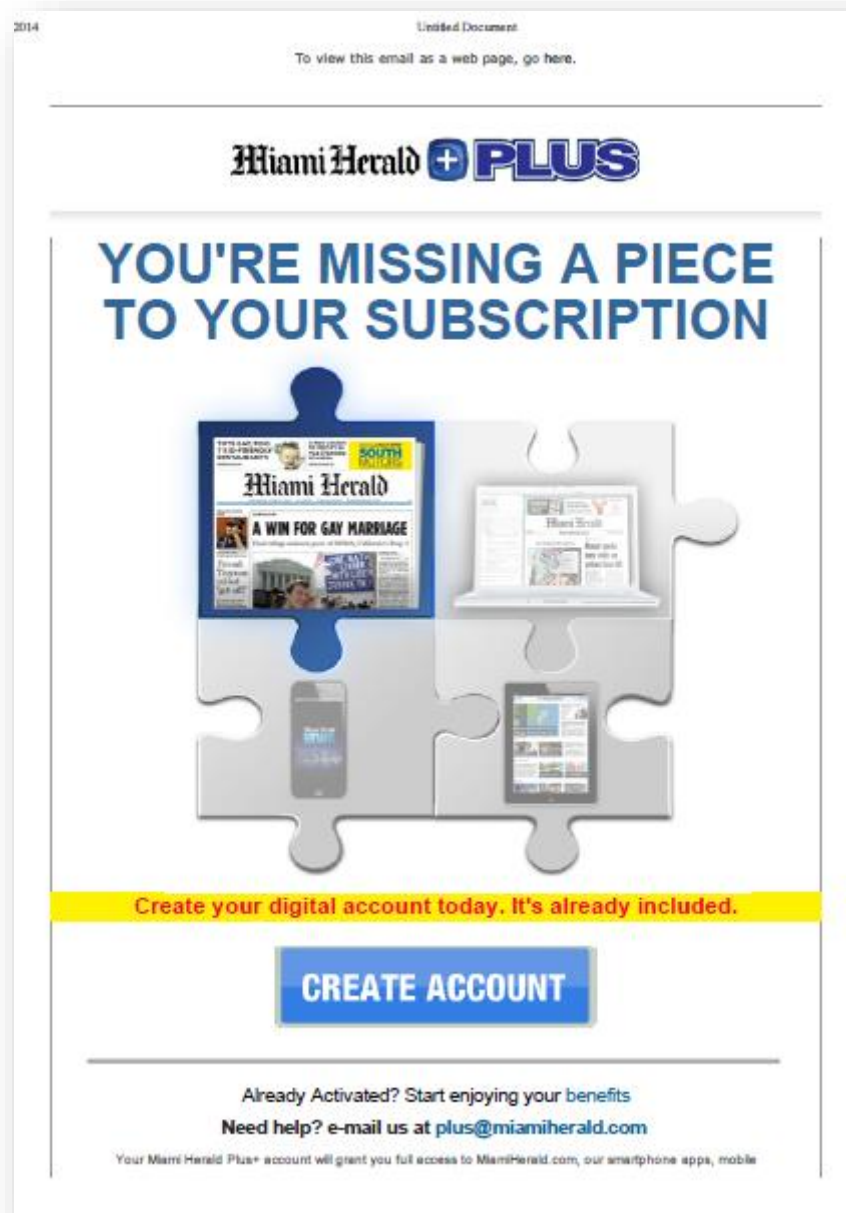
Print **Online** **Rewards**

The Day Tablet **Mobile**

MEMBERSHIP IS YOUR PASSPORT

Driving Registration & Adoption

Email



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Key Metrics in Benchmarking Your Subscription Based Business

- Marketing versus Operational.
- Building Audience
 - Marketing Print vs Marketing Digital
 - Distribution and Operational
- Acquiring Data
- Issue of the Lowest Common denominator



Key Metrics in Benchmarking Your Subscription Based Business



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PART 1

Super Bowl success at The News Tribune and The Olympian



When the Seattle Seahawks faced the Denver Broncos in Super Bowl XLVIII, the hometown newspapers launched wide-ranging strategies to make the most of the considerable revenue potential that comes along with being part of our nation's biggest sporting event.

Pumping up sales of the print product — every newspaper's bread-and-butter — was a major part of the playbook at The News Tribune and The Olympian in Washington State. Both McClatchy Company-owned publications, located in Seattle's South Sound, netted extraordinary Super Bowl-related results on the print side.

A 16-page special Super Bowl section was the capstone of their effort. Published on the day of the game and inserted in both newspapers, the section contributed to a 20 percent increase in newspaper sales compared to the previous week.

"People still like to have that tangible product to keep in their house, to save for years to come," said Phil Schroder, the newspapers' vice president of audience development.

The Monday following the championship saw even greater print results. Single copy sales post-Super Bowl soared 500 percent to 30,000 at The News Tribune in Tacoma, the larger of the two publications, according to Schroder. The Olympian reported 8,000 individual paper sales on Super Bowl Monday, an increase of 600 percent, he said.

Both papers were still basking in revenue afterglow when single-copy sales again spiked later in the week, following the post-championship victory parade.

"Early indications are that we sold 250 percent sales in both Tacoma and Olympia for the parade," said Schroder. "There has never been anything like this in this market."

They even partnered with Tacoma's Cascade Press to sell print posters of the game day front pages over the weekend, beginning the Monday morning after the Seahawks' victory.

The Super Bowl's influence extended far beyond the print product, for both publications as it reflected a profound change in the newspaper industry's business model.

"The first thing we look at now is not really the paper's sales. We're looking at how our website did, what was our Facebook traffic, things like that. Our engagement on Facebook was up 132 percent for the week of the Super Bowl compared to the week before., that's pretty big."

In today's newspaper world, there's a broader emphasis on the use of revenue attained from advertising, rather than focus strictly on how many copies of the paper are sold. Advertisers are assigning more clout to a newspaper's penetration within a specific postal zip code, rather than to generic circulation results. The industry is also responding to the steady rise of digital and mobile use among readers and the revenue and social engagement opportunities that migration brings.

With the paper's focus on creating digital content on its website, blog and social media pages, football fans had plenty of online content to explore. Unique visitors to [The News Tribune](#) vaulted up 88 percent on Super Bowl Sunday in comparison to a normal period, Schroder said.

Social media was a major part of their strategy. Knowing viewers would be scouring the website for news about the team during the weeks leading up to the Super Bowl, news

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Super Bowl section effort. The game papers, the 20 percent increase in sales compared to the previous week.

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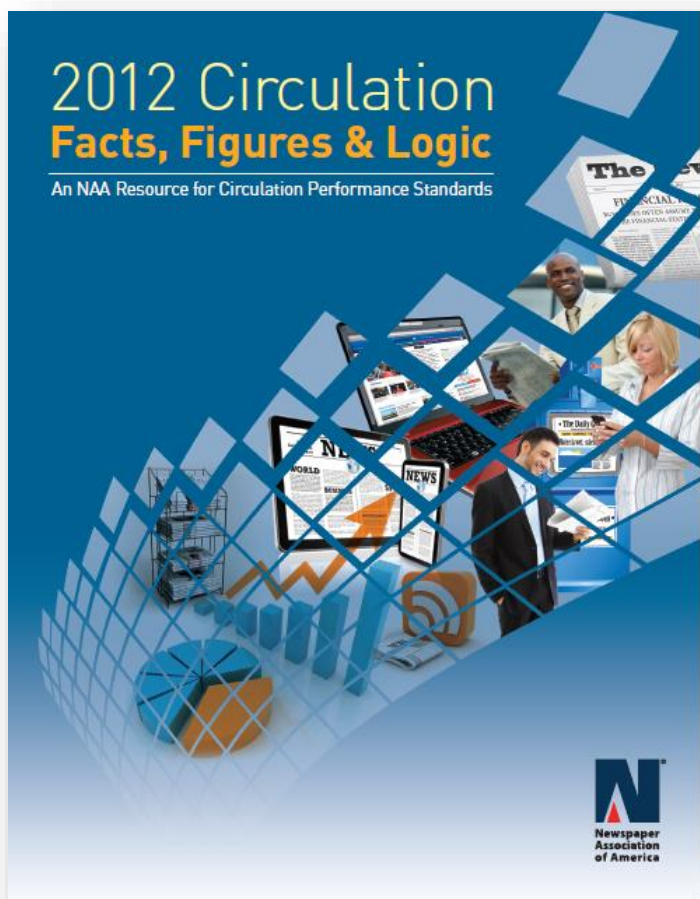
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Key Metrics in Benchmarking Your Subscription Based Business

- In the Field This Month



2011 NAA Circulation Survey



Participating in this survey is one of the most-important contributions you can make to your industry and to yourself. This survey helps to identify trends and key issues related to circulation practices in the newspaper industry. It will also help us serve you, and the industry as a whole, by providing a basis for programs and policy initiatives. We understand some of the information you provide in response to this survey is commercially sensitive, and we hold your answers in the utmost confidentiality. As such, **no individual newspaper's responses will ever be reported or released**; only the aggregated results will be made available once they are tabulated.

Please read the detailed instructions below regarding completing the questionnaire, as well as for contact information regarding any questions. Your participation is greatly appreciated.

COMPLETE SURVEY AND WIN FREE HOTEL ACCOMMODATIONS AND REGISTRATION!



Win Complimentary hotel accommodations and registration to **NAA's 2012 mediaXchange in Washington DC April 2-5 at the Washington Marriott Wardman Park** - a great jumping off point to experience the nation's capital.

Simply submit your completed 2012 NAA Circulation Survey **before the January 15th deadline**. All entries received before the deadline will be eligible for the drawing.

THERE ARE SEVERAL OPTIONS FOR COMPLETING THIS SURVEY

1. Online Survey: Click on the hyperlink in your email invitation and it will take you to the online survey.

Print the PDF Version of the survey that is attached, complete and send:

2. By Mail to: Clark, Martire & Bartolomeo, Inc.
375 Sylvan Avenue
Englewood Cliffs, NJ 07632
3. By Fax to: (201) 568-9740

If you have Adobe Acrobat you can fill out the interactive PDF version of the survey that is attached and send:

4. By Email to: NAACirculationSurvey@cmbinc.com
5. By mail to: the above address

Thank you for taking the time to support this important industry effort. We look forward to sharing the results with you in the coming months



Key Metrics in Benchmarking Your Subscription Based Business

- In the Field This Month

SECTION V: DIGITAL MARKETING

28a. What % of your total subscriber base has activated for digital access?

_____ %

28b. How many active digital-only subscribers do you have?

28c. What is your churn rate for digital subscribers?

28d. What % of your digital subscribers have activated their digital account?

_____ %

28e. What % of your eligible subscribers have actually activated their digital account?

28f. What % of your digital subscribers have accessed the digital replica edition?

_____ %



Key Metrics in Benchmarking Your Subscription Based Business

Actionable versus performance

Example:

Subscriber Churn is 35%

OR

Subscriber Churn by Publication 2011			
	Daily	Saturday	Sunday
	%	%	%
Industry	31%	40%	42%
25,000 and under	34%	33%	35%
25,001-50,000	34%	38%	38%
50,001-100,000	36%	44%	47%
100,001-200,000	31%	44%	44%
200,000 or more	26%	37%	40%

Sunday Churn for Subscribers < 18 months is 75 percent

Sunday Churn for Subscribers 18 months- 3 years is 50 percent

Sunday Churn for Subscribers > 3 years is 25 percent



Key Metrics in Benchmarking Your Subscription Based Business

Actionable versus performance

Example:

Subscriber Retention is 35% after One Year

OR

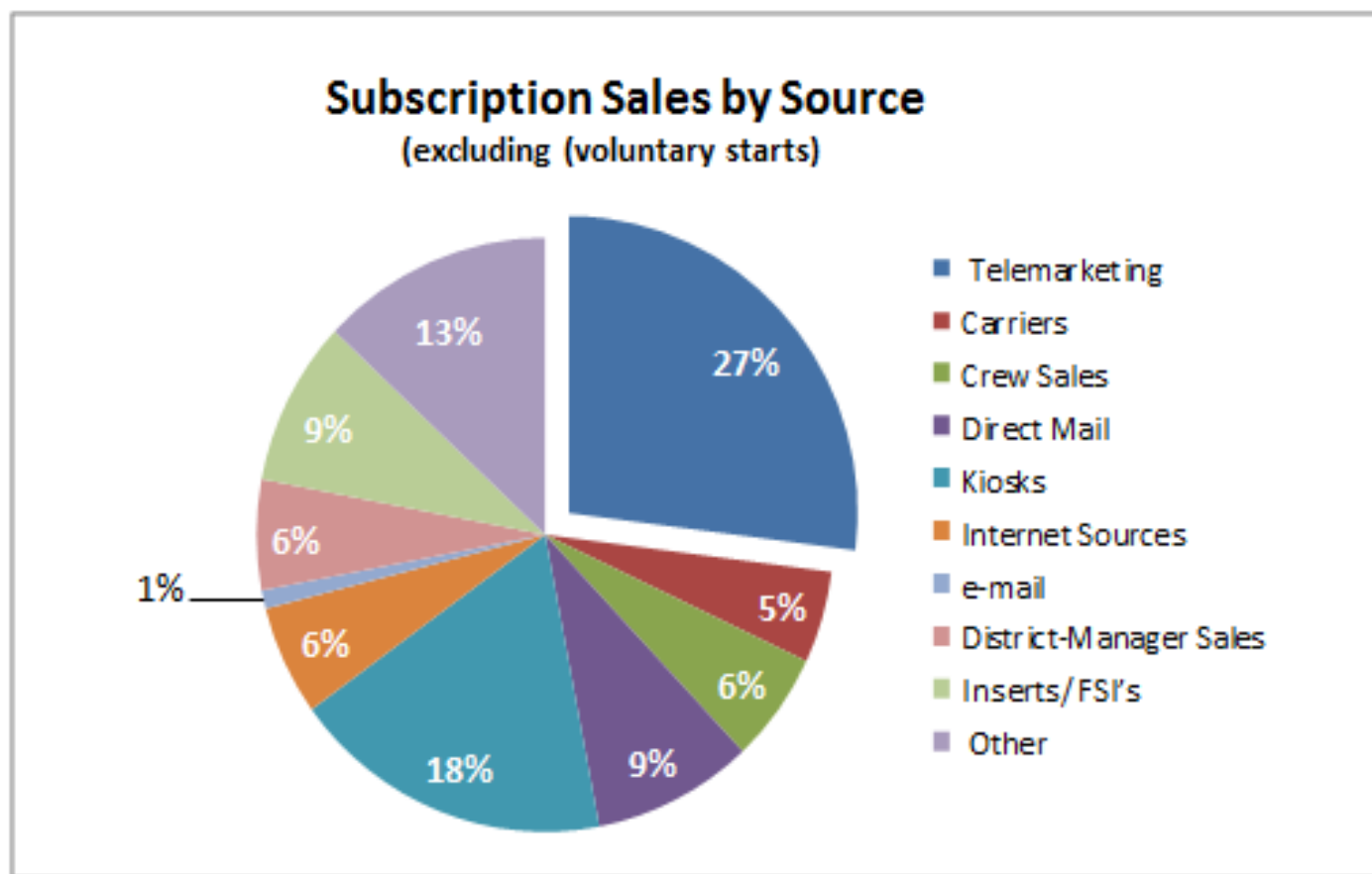
Trend: 52-Week Retention Rates

	2011	N	2008	N
a. Telemarketing	36%	102	33%	173
b. Carriers	49	69	48	148
c. Crew Sales	24	50	25	119
d. Direct Mail	55	86	49	147
e. Kiosks	36	102	37	165
f. Internet (Newspaper or third-party sites)	54	95	53	146
g. E-mail	45	27	39	23
h. District Manager Sales	48	52	49	106
i. Single-Copy & TMC Inserts/PSIs	48	90	49	144
j. Voluntary	-	-	-	-
k. Other	50	37	46	80



First:

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



Key Metrics in Benchmarking Your Subscription Based Business

- 1. PRINT MARKETING: Cost per Unit of Circulation

Subscriber Acquisition:

Retention Tracking

Cost per Order:

\$ 17.50	500	\$ 8,750
----------	-----	----------

Weeks	Active	PerCent Still Active	
0	500	100%	500
4	490	98%	495
8	465	93%	485
12	410	82%	466
16	325	65%	438
20	300	60%	415
24	295	59%	398
28	294	59%	385
32	290	58%	374
36	188	38%	356
40	181	36%	340
44	177	35%	326
48	175	35%	315
52	173	35%	305
	4.368	301.65	Average Daily Impact:
		1.66	SalesPressure Ratio:
		\$29.01	CostPer Unit:



Key Metrics in Benchmarking Your Subscription Based Business

PRINT MARKETING:

- 1. Cost per Unit of Circulation
- 2. Subscriber Retention 13/26/52/65/78 weeks by sales channel & Payment Type & Rate & FOD
- 3. Sales Pressure Ratio by Source
- 4. Net Revenue Per Subscriber: Circ / Adv (Insert)
- 5. Single Copy Sales – Sales Per Outlet /Returns Per Outlet /



Key Metrics in Benchmarking Your Subscription Based Business

PRINT DISTRIBUTION:

- 1. Cost per Copy by Zip – Variable
- 2. Piece Rates / Margins
- 3. Complaints per Thousand
- 4. Single Copy Margins



Key Metrics in Benchmarking Your Subscription Based Business

Data Sources –

- NAA's Circulation Facts, Figures & Logic
- Inland Quarterly Study
- Corporate Benchmarking
- Networking groups
- comScore
- Scarborough
- AAM
- Mather
- Press+
- NAA Survey Data



2014 NAA Single Copy Survey

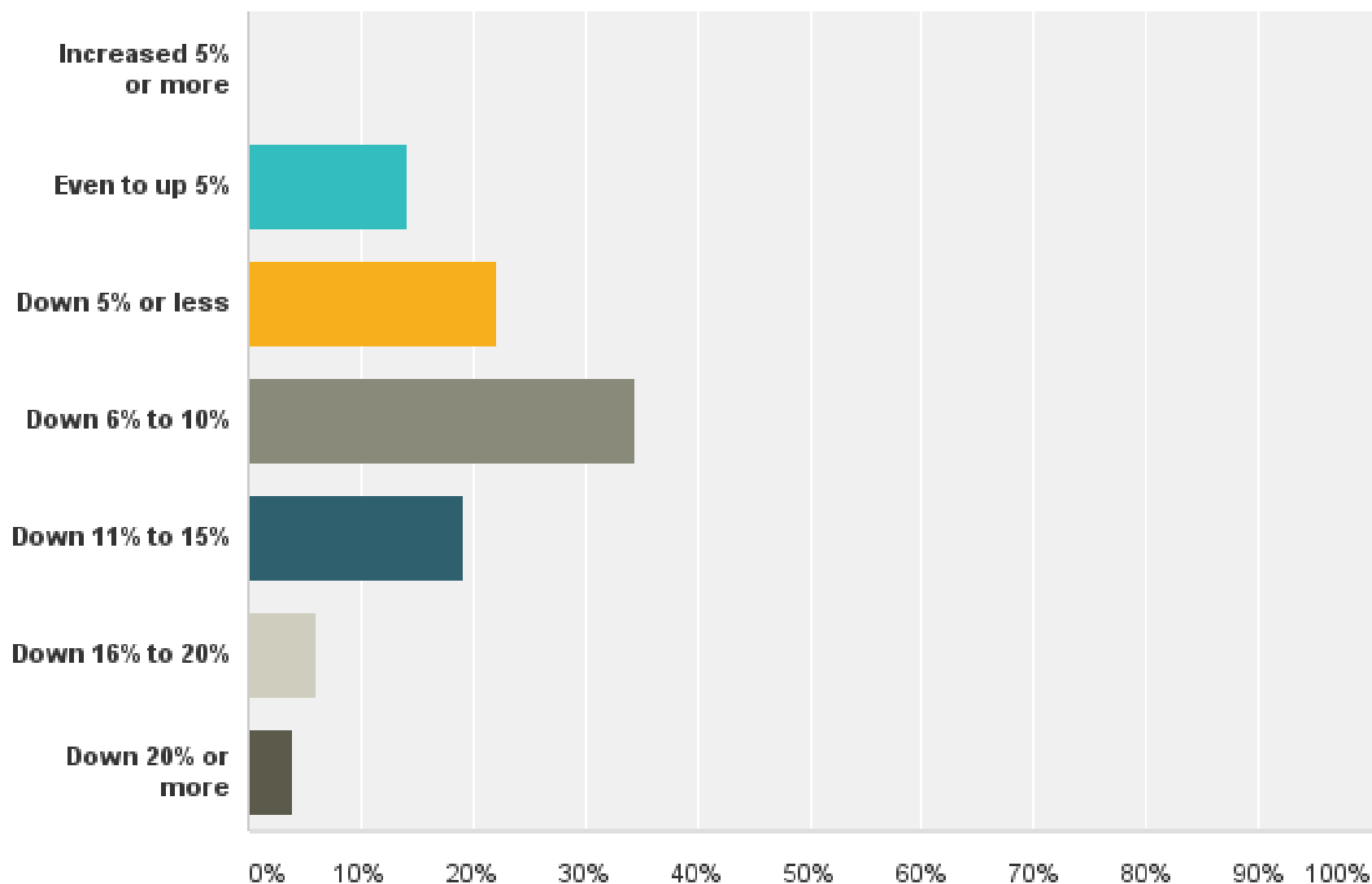
Summary Data as of 10-17-14, Questionnaire remains in the field

Friday, October 17, 2014

Powered by  SurveyMonkey



Q3: What was your daily single-copy sales trend for the 2nd quarter 2014 compared to the 2nd quarter 2013?



Key Metrics in Benchmarking Your Subscription Based Business

In Summary:

- Old metrics versus new metrics reflecting new business model
- Actionable Data
- Revenue versus copies but also audience measurements
- Reach across a host of products
- Still need operational data
- Inland has a new platform - Dashboard Approach
- Mobile metrics... Time spent etc.
- NAA Audience Metrics Task Force
- If you are an audience and circulation exec or you have one in your staff who cannot think in these terms you / they have a short career ahead.



In 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.



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Audience Development is Engaging Consumers.



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