

Revitalizing A Signature Benchmarking Service

Publisher Benchmarks

Nov. 4, 2014

About Inland



- Founded 1885
- 1,000 newspaper members
- Dailies & non-dailies
- Services to members

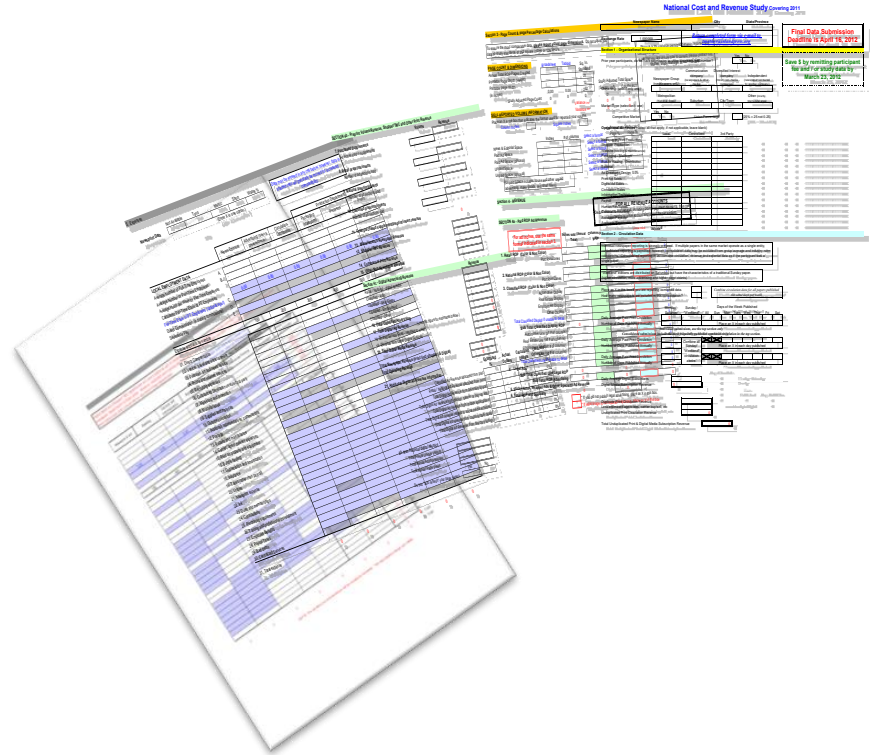
Inland “Cost & Revenue Study”

- Created in 1920's
- Detailed revenue and expense data
- Allowed peer comparisons
- Confidential
- Annual snapshot



But, there were challenges.....

- Difficult to use
- Industry changing rapidly
- Manual data collection
- Declining participation



And, it was like looking...



Stay engaged.
Find solutions.
Move forward.

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“Good news—I hear the paradigm is shifting.”

***We realized that we needed to shift the
paradigm from an annual snapshot...***

... to a continuous management tool.

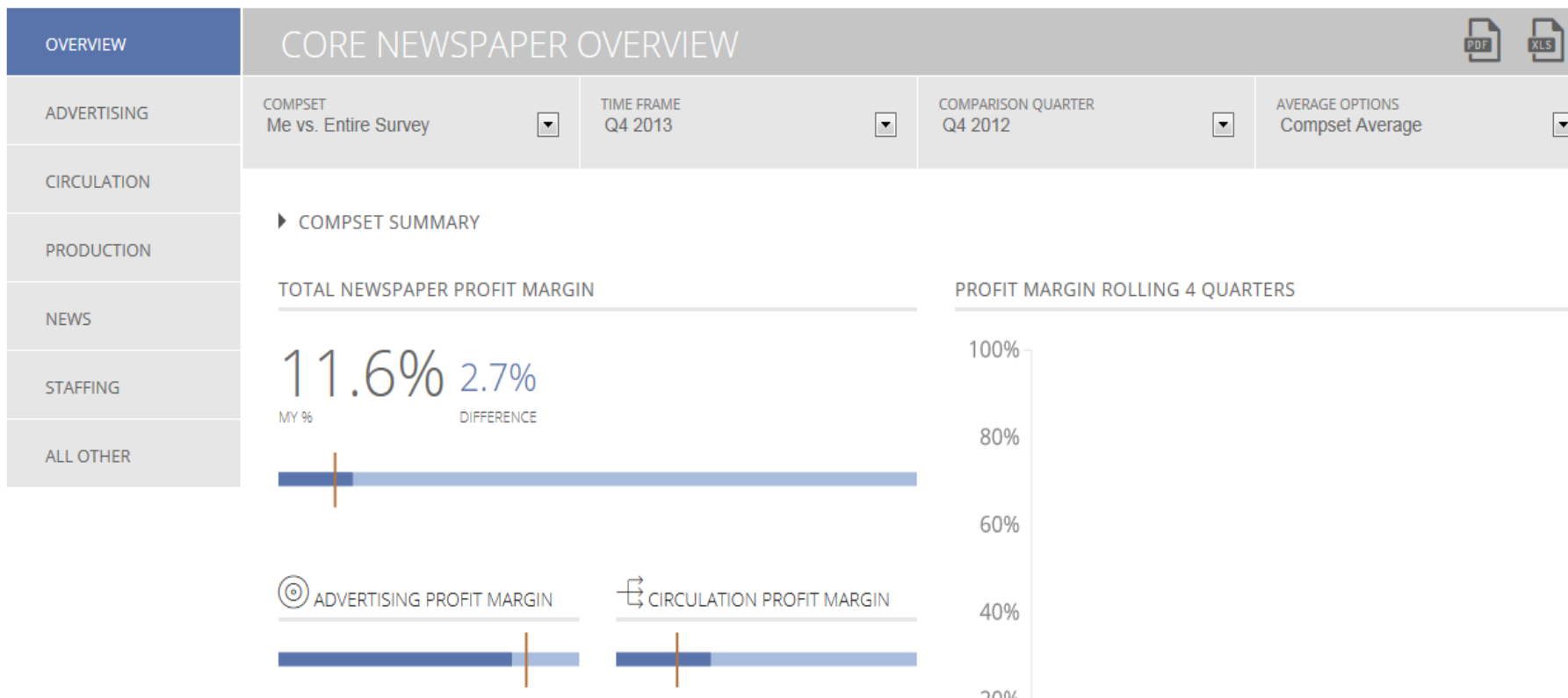
Find a good partner: **mather:**

Project Goals

1. Smart
2. User friendly
3. More frequent
4. Available 24/7

Publisher Benchmarks

WELCOME, BOB TERZOT
[MY ACCOUNT](#) | [LOGOUT](#)



Choose your competitive set...

Regions

- Me vs. Canada
- Me vs. Eastern Midwest
- Me vs. Middle Atlantic
- Me vs. Mountain
- Me vs. New England
- Me vs. Pacific
- Me vs. South Central
- Me vs. Southeast
- Me vs. Southwest
- Me vs. Western Midwest

Circulation Size

- Me vs. Circ Size (0-25K)
- Me vs. Circ Size (26K-50K)**
- Me vs. Circ Size (51K-100K)
- Me vs. Circ Size (101K-200K)
- Me vs. Circ Size (201K-999K)

Ownership

- Me vs. Corporate
- Me vs. Independent

Printing

- Me vs. Outsourced
- Me vs. Print

Union Employees

- Me vs. Union
- Me vs. Non Union

Ad Building

- Me vs. Outsourced
- Me vs. In House
- Me vs. Centralized

Ad Call Center

- Me vs. Outsourced
- Me vs. In House
- Me vs. Centralized

Circulation Call Center

- Me vs. Outsourced
- Me vs. In House
- Me vs. Centralized

TMC Delivery

- Me vs. Carrier
- Me vs. Mail
- Me vs. Neither
- Me vs. Both

Distribution

- Me vs. Traditional District Mgr/ Small Carrier
- Me vs. Small Agent Delivery
- Me vs. Large Agent Delivery
- Me vs. Outsourced To Another Newspaper
- Me vs. Other

Carrier Compensation

- Me vs. Buy Sell Relationship
- Me vs. Fee For Delivery
- Me vs. Other

Delivery Time

- Me vs. Morning
- Me vs. Evening
- Me vs. Evening Daily/ Morning Sunday
- Me vs. Morning Daily/ Evening Sunday

Custom Compsets

- Other
- Me vs. My Company
- Me vs. Complete Initial Data

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COMPARISON QUARTER
Q4 2012

AVERAGE OPTIONS
Compset Average

PROFIT MARGIN ROLLING 4 QUARTERS

| Quarter | Profit Margin (%) |
|---------|-------------------|
| Q1 2013 | ~5% |
| Q2 2013 | ~10% |
| Q3 2013 | ~10% |
| Q4 2013 | ~15% |

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Start high, go deep

Publisher Benchmarks

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| OVERVIEW | CORE NEWSPAPER OVERVIEW | | | |
|-------------|---------------------------------|-----------------------|-------------------------------|------------------------------------|
| ADVERTISING | COMPSET Me vs. Entire Survey | TIME FRAME Q4 2013 | COMPARISON QUARTER Q1 2012 | AVERAGE OPTIONS Compset Average |
| CIRCULATION | | | | |
| PRODUCTION | | | | |
| NEWS | | | | |
| STAFFING | | | | |
| ALL OTHER | | | | |

▼ COMPSET SUMMARY

| NUMBER OF PAPERS | AVERAGE COMPSET REVENUE | TOTAL DAILY NET PAID CIRCULATION COMPSET AVERAGE | STAFFING FTES TOTAL COMPSET AVERAGE |
|------------------|-------------------------|---|--|
| 65 | \$4,570,684 | 29,229 | 116.3 |

TOTAL NEWSPAPER PROFIT MARGIN

11.6% 2.7%
MY % DIFFERENCE



PROFIT MARGIN ROLLING 4 QUARTERS



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TOTAL NEWSPAPER PROFIT MARGIN

11.6% 2.7%

MY %

DIFFERENCE



© ADVERTISING PROFIT MARGIN

77.6%

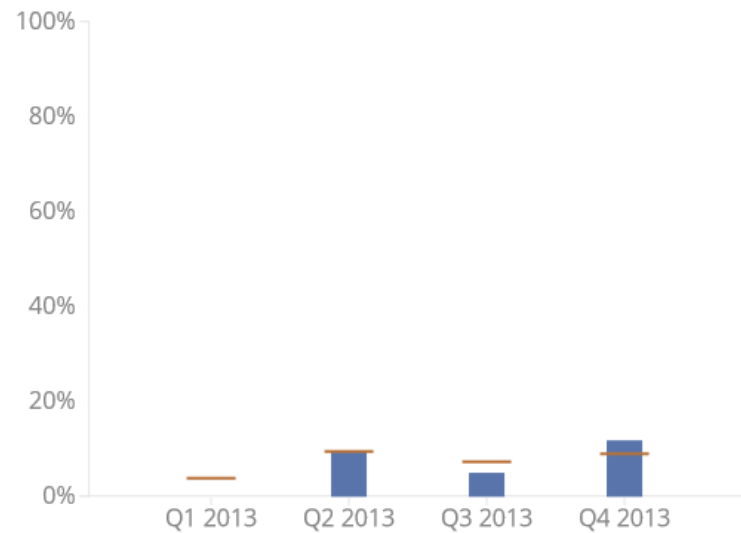
-5.0%

€ CIRCULATION PROFIT MARGIN

31.1% 10.9%



PROFIT MARGIN ROLLING 4 QUARTERS



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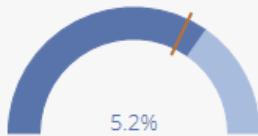
REVENUE OVERVIEW

Total Revenue

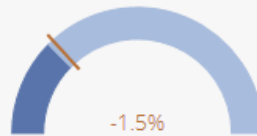
\$4,683,854



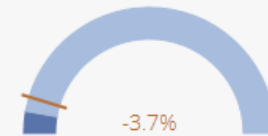
Advertising



Circulation



All Other



TOTAL EXPENSE

\$4,141,414



STAFFING FTES TOTAL

122.8



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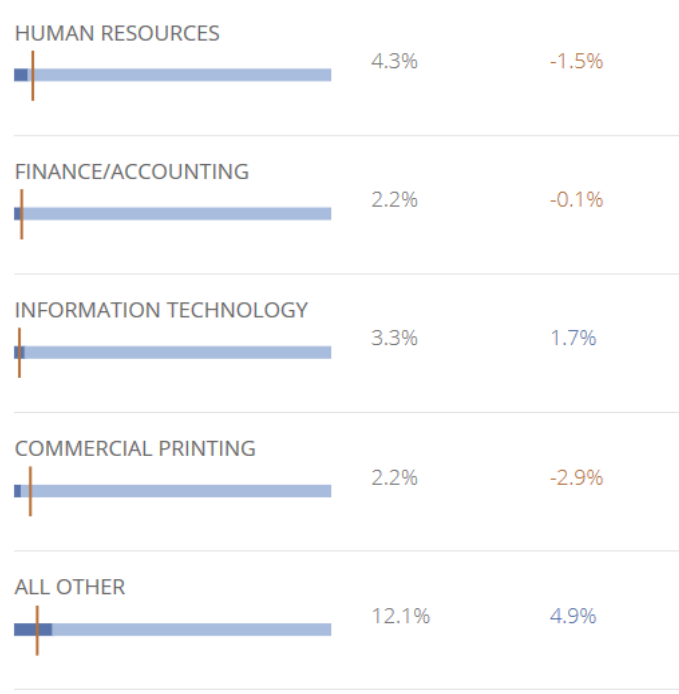
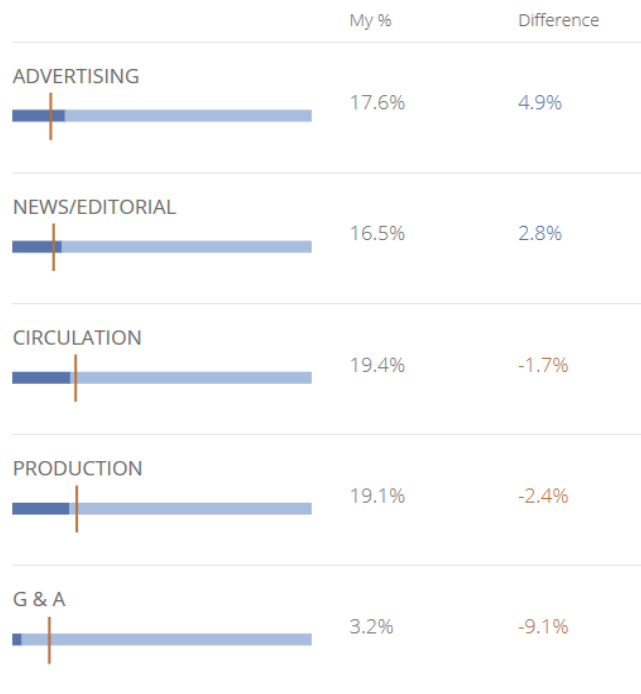
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TOTAL EXPENSE

\$4,141,414

EXPENSE CATEGORIES

Percent of Total Newspaper Expense



Start high, go deep

STAFFING FTES TOTAL



FTE CATEGORIES

Percent of Total FTEs

| | My FTE | Compset | My % | Difference |
|----------------|--------|---------|-------|------------|
| ADVERTISING | 28.3 | 23.7 | 23.0% | 4.6 |
| NEWS/EDITORIAL | 34.3 | 30.5 | 28.0% | 3.8 |

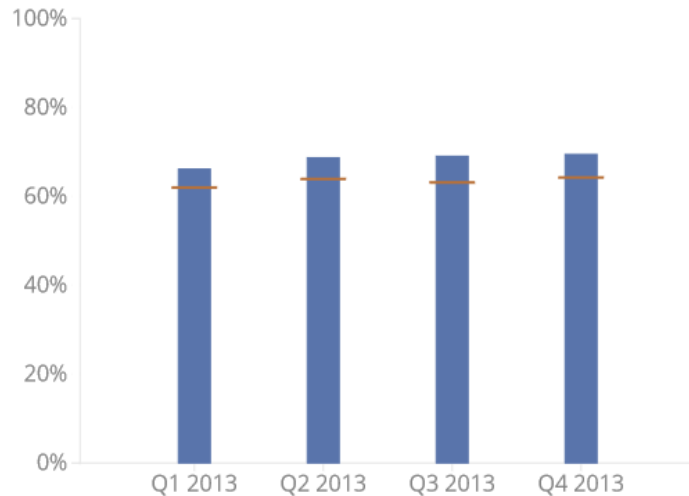
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ROLLING 4 QUARTER TRENDS



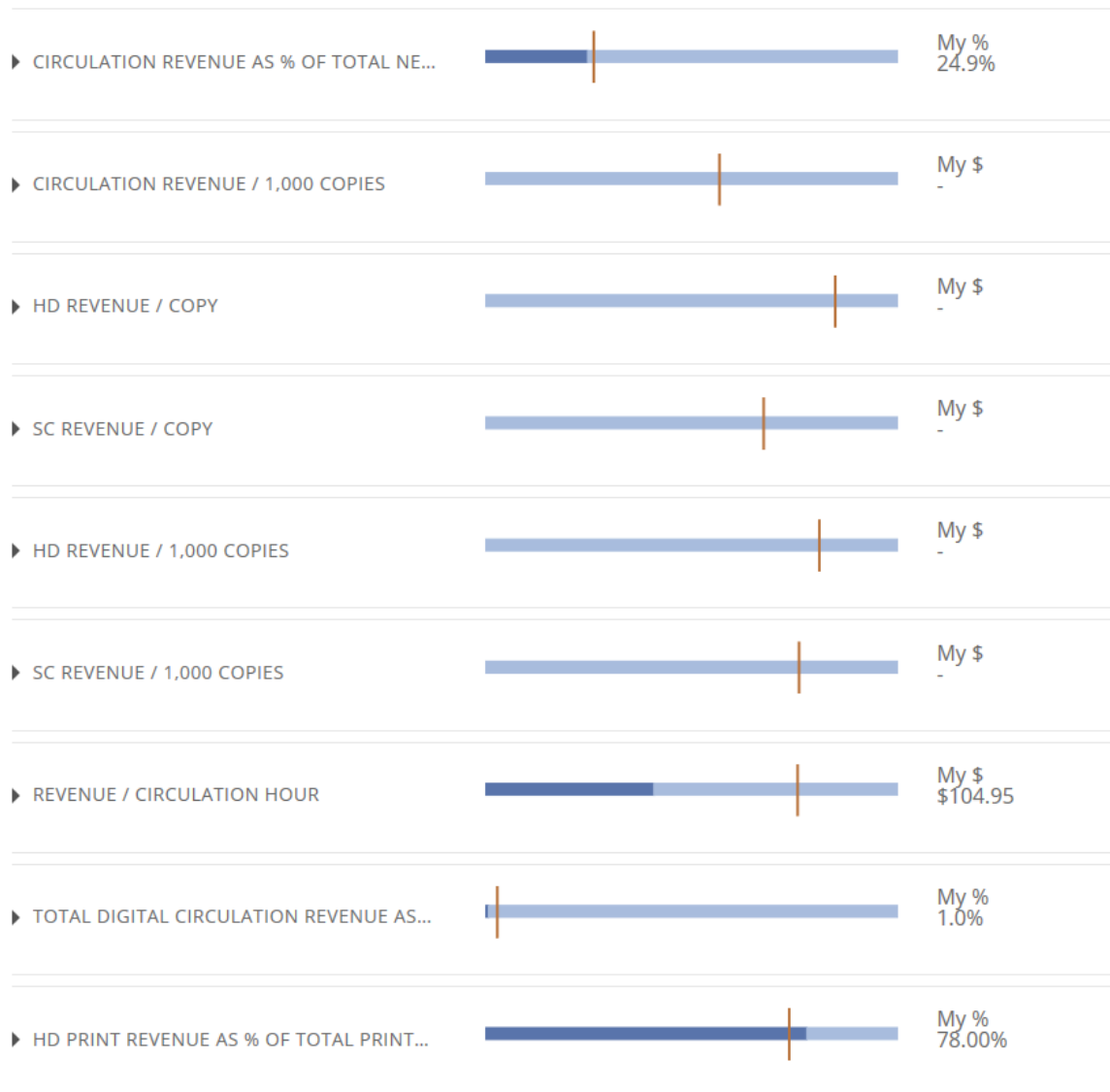
QUARTER VS. QUARTER COMPARISON

| | Q4 2012 | Q4 2013 | CHANGE |
|----------------|---------|---------|--------|
| Me | 71.2% | 69.5% | -2.40% |
| Comp Set | 65.7% | 64.3% | -2.23% |
| Me vs Comp Set | 8.28% | 8.10% | |

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► COMPSET SUMMARY

DIGITAL SITE TRAFFIC

► UNIQUE VISITORS

► PAGE VIEWS

► INVENTORY AVAILS FOR QUARTER

► TOTAL AD IMPRESSIONS

► BANNERS

► LOCAL

► NATIONAL

► REMNANT

► SOCIAL

► ALL OTHER

► TOTAL CLICKS

► DIGITAL REVENUE PER AD IMPRESSION

► DIGITAL REVENUE PER CLICK

► DIGITAL REVENUE PER PAGE VIEW

My Val
-

My Val
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My Val
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My Val
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My Val
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My \$
-

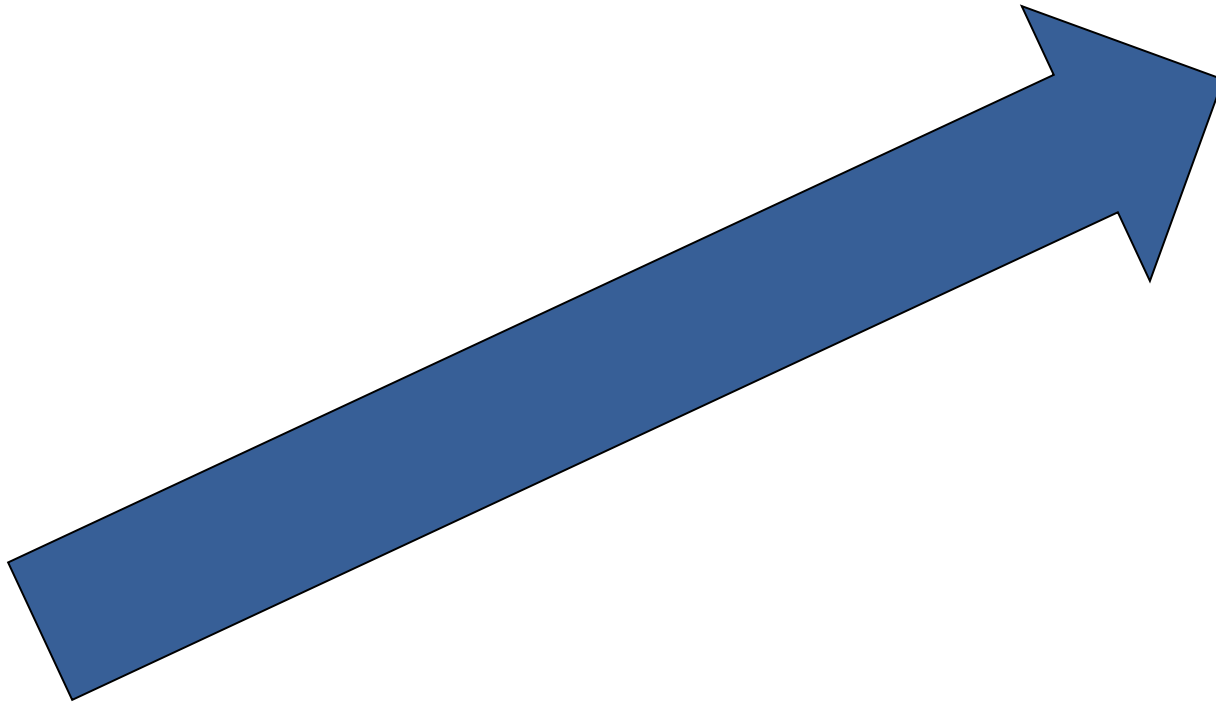
My \$
-

My \$
-

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Participation Up Nearly 2X!



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The Dallas Morning News
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Thank-You