



# NAA's 2015 Circulation Facts, Figures & Logic

An NAA Resource for Consumer Marketing and  
Operational Performance Standards

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Operational Performance Standards**



**Newspaper Association of America**

# Preface

This 2015 edition of NAA's *Circulation Facts, Figures & Logic* is the latest installment of NAA's continuing study that has documented the most fundamental changes in marketing the daily newspaper. This year's edition is no exception. The study captures changes in the newspaper business model and the move to marketing content across platforms. The study was conducted at the close of a year when newspapers were learning to market digital content with the combined goal of expanding the newspaper audience while increasing revenue and streamlining operations.

## The Study

This study documents a continuation of the substantive changes first documented more than five years ago in how newspapers are marketing home delivery, their focus on revenues, and changes in operational practices. Newspapers have become increasingly dependent on consumer revenues, and the data provides insights into the tactics and strategies that have been applied to increasing the revenue per reader while minimizing related expenses. Newspapers are continuing to make a substantial investment in acquiring new subscribers while moving toward development of increased efficiencies in other areas.

This year's edition of *Circulation Facts, Figures & Logic* captures changes that are most evident when the data is trended over the last five years. These trends signal fundamental changes in the approach to decision-making in the audience and circulation departments.

The survey of circulation executives continues to serve as the core of the study. Their responses are supplemented with data from Scarborough Research, the Alliance of Audited Media (AAM) and data provided courtesy of Mather Economics. Collectively this information, and the ability to trend the data, provides documentation on many of the foundational changes in the newspaper business model.

The continued participation of a cross-section of daily newspapers and the use of standardized questions during the 15-year history of the study provides the ability to trend the data and document significant changes over time. More importantly, extending these trends forward can provide newspaper executives insight into where the industry is going. The standardized questions and representative participation also provide newspaper executives with a study that can be used for benchmarking across markets. For this reason, the standardized information in this study is often used by individual newspapers in the development of marketing plans, budgets and long-term capital planning.

The design and execution of the study is a collaborative effort. NAA relies on input from its members and leadership from a dozen volunteers who serve as a steering committee for the study. This group of circulation and marketing executives provides leadership in updating the core questionnaire, encourage their colleagues to complete the survey, and offer advice in interpreting the findings.

## The Methodology

NAA's research team maintains responsibility for quality control, finalizing the questionnaire and coordinating activities with Clark, Martire & Bartolomeo, Inc.

The study was conducted via an email invitation that allowed respondents to complete the survey either online, via mail or by filling out an interactive PDF. The self-administered survey was conducted between November 2014 and February 2015.

Clark, Martire & Bartolomeo, Inc. was responsible for conducting the survey and performing the statistical analysis. Where reduced basis sizes proved unreliable,

newspapers of various circulation sizes were collapsed, or results were shown based on the total sample only.

### Survey results were distributed as follows:

Total	175
25,000 and under	46
25,001-50,000	56
50,001-100,000	49
100,001-200,000	15
200,001 or more	9

The results of 175 interviews carry a margin of error of +/- 7.4%.

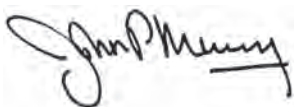
## This year's edition of *Circulation Facts, Figures & Logic*

This year's edition of *Circulation Facts, Figures & Logic* follows a familiar format. It starts with an executive summary and a section on the latest multi-platform audience data. This is followed by sections with an in-depth look at the new data on distribution practices, marketing home delivery, single copy sales and customer service. The final section, titled "Just the Facts," provides findings on almost all of the questions included in the survey. There are also comparisons with the responses from previous studies where the data is comparable.

With few exceptions, the data provided for any given question are the median of the responses—half the newspapers provided an answer higher than the numbers stated, and half provided a number lower. This data is not presented as an industry standard; it only states that a comparable level of performance is better than half the newspapers of similar size and worse than the other half.

Not every question asked in earlier studies was included in this survey. Each time the study is conducted, some questions are dropped and others added to keep the study relevant while keeping the time commitment required to complete the questionnaire reasonable to ensure a meaningful level of participation.

We thank the committee of circulation executives who crafted the questionnaire and all of the newspaper executives who devoted their time and resources to respond to the survey. Participation in this study does require a commitment, and it is a commitment we appreciate. We hope you find this year's edition of *Circulation Facts, Figures & Logic* a valuable tool, and we wish you continued success in marketing your newspaper.



**John P. Murray**  
**Vice President of Audience Development**  
Newspaper Association of America

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# Executive Summary

Newspaper circulation operational and consumer marketing strategies have played a substantive role in the evolving newspaper business model.

NAA's 2015 *Circulation Facts, Figures & Logic* documents continued improvements in operational efficiency, selective pricing and revenues per subscriber. The combination has resulted in substantial gains in profitability in the traditional circulation functions of a newspaper.

This installment of the study demonstrates a continued focus on revenue with insights into how newspapers are incorporating digital subscription packages into the revenue strategy. The result is consistent with a newspaper business model more dependent on the profitability of marketing the newspaper to readers across platforms.

The combination of expense savings and more aggressive pricing in both single copy and home delivery equates to an improved return on each dollar of circulation revenue. The simple math of comparing each dollar of circulation expense and revenue from this year's study illustrates the continued improvements that have been measurable since 2011. The improvements in the 100,000+ circulation newspapers are even more dramatic when comparing the period of 2008 to 2014. Since that time the contribution percentage has more than doubled.

### 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

Source: NAA 2015 Circulation Facts, Figures and Logic comparing total median circulation expenses, excluding newsprint, and revenues.

Continued improvements in managing expenses are evident in outsourcing, more efficient sales efforts, lower margins at the distributor level and a smaller workforce. On the revenue side, significant factors include the improved value proposition from adding digital components, premium pricing of the seven-day subscription and more strategic discounts. Inherent in this strategy is a willingness to accept lower total paid circulation averages, particularly on weekdays with less advertising support. The result is improved revenues despite the lower volume. Another contributing factor is that one out of two newspapers now charge different rates for different demographic and geographic segments.

### Trend: Price for One Week Subscription - Daily and Sunday

	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	<b>47.5</b>
25,001-50,000	5.53	4.50	3.85	<b>43.6</b>
50,001-100,000	6.00	4.44	4.10	<b>46.3</b>
100,001-200,000	6.65	5.11	3.94	<b>68.8</b>
200,001+	6.60	5.55	4.88	<b>35.2</b>

## Improved revenue per subscriber and the digital component

The digital component contributes at two levels: the improved value proposition when subscribers are charged more because they are receiving additional access to more content, as well as the improved availability across platforms. The newspaper also gains a new revenue stream from digital-only subscriptions.

**Charging Non-subscribers for Digital Access to the Newspaper's Website**

	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

Audience and circulation managers responsible for marketing digital have three related objectives and sales strategies:

- 1. Sell complete print/digital bundled subscriptions.**
- 2. Drive current print subscribers to activate online access to support efforts to improve retention.**
- 3. Sell digital-only subscriptions for profitability and additional digital reach.**

The majority of the industry's new subscriptions are now sold with a digital component. This is true for all size newspapers except those at or below 25,000 circulation.

**Percentage of Paid Starts that are:**

	2014		
	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

The digital component has been leveraged in a number of ways to enhance net revenue. For example, 6 out of 10 newspapers no longer provide credit for vacation stops based on the assumption that the subscriber continues to have digital access to the content regardless of whether the print newspaper is delivered.

Digital-only subscriptions remain a small slice of new revenues, and newspapers have had limited success growing that segment beyond a level typical of their market. The other new marketing challenge facing audience departments is motivating print subscribers to activate and access their digital products.

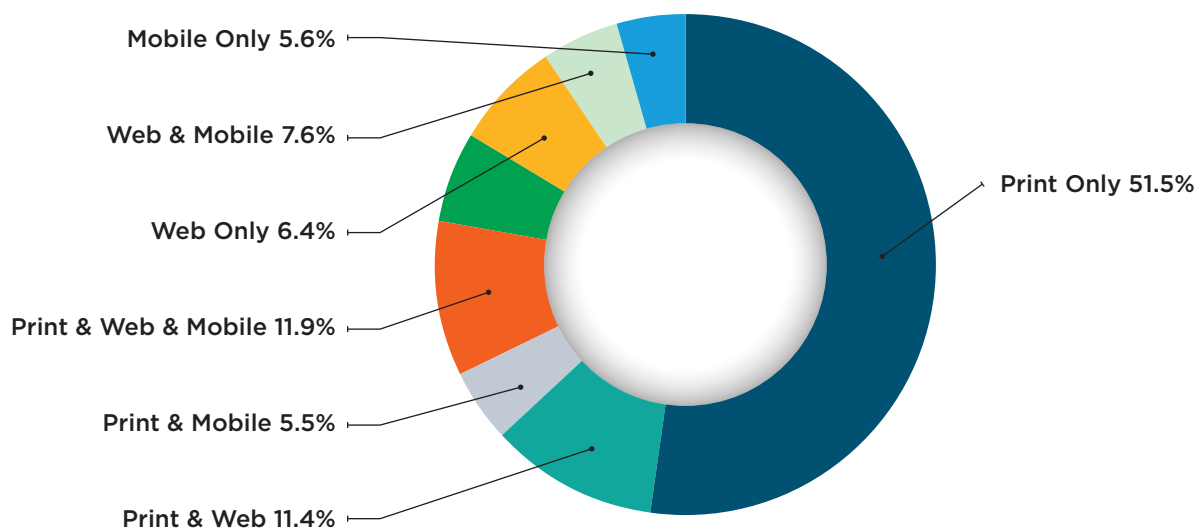
**Median Percentage of Eligible Subscriber Base that has Activated Digital Products**

	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

The level of increased engagement newspapers have measured when print subscribers do access the digital products on a regular basis correlates with retention. Audience departments have intensified the use of direct response programs to activate print subscribers.

The opportunity to improve print subscriber engagement and increase digital usage is also documented by Scarborough Research. The slice of the readership pie that only reads print continues to shrink but remains substantial. At the end of 2014, more than half of print readers were not accessing newspapers' digital products.

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



Source: Nielsen Scarborough, Release 2/2014

This readership research by platform also documents the growth in mobile-only access. Readers who use only mobile devices, rather than desktop or laptop computers, are now the growth segment of newspaper audience. The digital audience engaged with newspaper content reached a new peak in March 2015, totaling 176 million adult unique visitors. Mobile users of newspaper digital content increased 53 percent in March 2015 from the same month the previous year, to 71 million adult unique visitors.



## Continuing progress in improving operational efficiencies

Through operational partnerships, outsourcing and more effective sales programs, circulation departments continue to reduce expenses while expanding services.

A growing number of newspapers are outsourcing at least a portion of home delivery distribution. It may be in the form of partnerships with other newspapers or large independent distributors or distribution companies.

### 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

Circulation departments are also continuing to take on other publications for additional revenue, as well as to enhance their distribution capabilities and improve the profitability of routes the newspaper would otherwise have to subsidize. Adoption of the “one carrier down each street” strategy has generated immense savings for the industry.

### Newspapers that Deliver Other Different Publications

	Yes, Deliver Other Publications	Number of Different Publications Delivered Daily
	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

## Better refined sales strategies equal lower expenses and low subscriber churn

Audience and circulation departments are selling fewer and better targeted subscriptions, and the result is fewer stops, lower overall home delivery volumes and less expense.

One example is targeting sales to subscribers willing to pay in advance or sign up for a recurring payment plan at the point of sale.

Newspapers have continued the trend of targeting discounts to acquiring new subscribers while enhancing the overall revenue per subscriber by eliminating unnecessary discounts tied to the method of payment. For example, the percentage of newspapers providing discounts for recurring payment plans has declined sharply since 2008.

### Trend: How Subscription Sales Effort is Transacted

	Credit/Debt Card		Cash		No Payment	
	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	39	36	48	40	14	24
25,001-50,000	52	38	26	33	14	29
50,001-100,000	50	42	24	28	21	30
100,001-200,000	59	39	22	23	11	39
200,001+	67	42	36	18	7	40

### Trend: Offer Lower Subscription Rate for Easy Payment Plan

	2014	2011	2008
<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

This leap of faith has proven effective in reducing discounts for subscribers on recurring payment plans and long-term advance payments. Subscriber retention rates have remained consistent over the last six years, and the industry has held on to the improvements in subscriber churn that were made prior to that time period. Higher subscriber churn for Sunday reflects newspapers' more aggressive selling efforts for that profitable edition, whether as part of a weekend package or a Sunday-only subscription.

### Home Delivery Subscriber 2014 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

## Aggressive single copy pricing has also contributed to revenue gains

The one dollar daily newspaper and the two dollar Sunday edition are now the most popular price points. The result has been lower volumes and increased revenue for most newspapers. The 75 cent daily remains popular with smaller newspapers, and as a result, sales losses have not been as dramatic in that segment.

Retailing the newspaper at the higher price points and lower single copy sales has presented a number of challenges. The number of newsrack locations has been reduced almost by half in the past six years, but newspapers have managed to open enough over the counter retail locations to maintain a similar level of total outlets.

Over the counter sales account for 80 percent of weekday and Sunday sales, making the retailer relationship critically important. Despite the lower overall sales volume and fewer employees dedicated to retailing the newspaper, the number of sellouts has been managed to a level close to earlier years.

### Median Sellout Percentages for Daily and Sunday Editions

2014		
	Daily	Sunday
<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

Consistent with the focus on revenue, newspapers have improved their margins, including the percentage of the retail price billed to the retailer. For example, 92 percent of newspapers now charge a premium on Thanksgiving Day, and many have also chosen other high-demand days for premium pricing.

Although there are expenses, including returns and the scan-based losses associated with retailing the newspaper, single copy sales constitute a larger percentage of most newspapers' revenue than ten years ago.

## In summary, much has been done to maximize reader net revenues

The combined impact of higher prices despite losses in paid circulation, as well as improved efficiencies throughout the marketing of the newspaper, have resulted in a dramatic improvement in profitability with only minor lapses in customer service. This year's study documents continued improvements in operational efficiency, selective pricing and effective applications of technology. These efforts have improved the profitability of every copy sold. It will be difficult to manage additional gains, but effective marketing to improve reader engagement with the digital component holds the possibility of incremental revenue going forward.

# Newspaper Media Audience Snapshot

## Fascinating Audience Facts

More than 157 million American adults—two out of three adults nationwide—read the print newspaper in print or online in a typical week, according to Nielsen Scarborough Research.

- ◆ Three out of four adults with household incomes of \$100,000 or more engage with newspaper media in print or online in an average week.
- ◆ Eighty percent of adults who have done some post-graduate work or have a graduate degree are readers of newspaper media during the week.
- ◆ Nearly eight out of ten (79 percent) of adults who made monetary contributions to political organizations in the past year read newspapers in print or online in the past seven days. Nearly as many (71 percent) who report they always vote in local elections also engage with newspaper media in print or digital form during an average week.
- ◆ The median age of an adult who read the print newspaper in a typical week is lower than the median age of adult viewers of The Fox News Channel, The Weather Channel, MSNBC, CNN, and radio news/talk station listeners.



## The Millennial Moment

The misperception that Millennials—adults under age 35—are not connected with newspaper media is belied by the data. Here are some of the facts from Nielsen Scarborough Research:

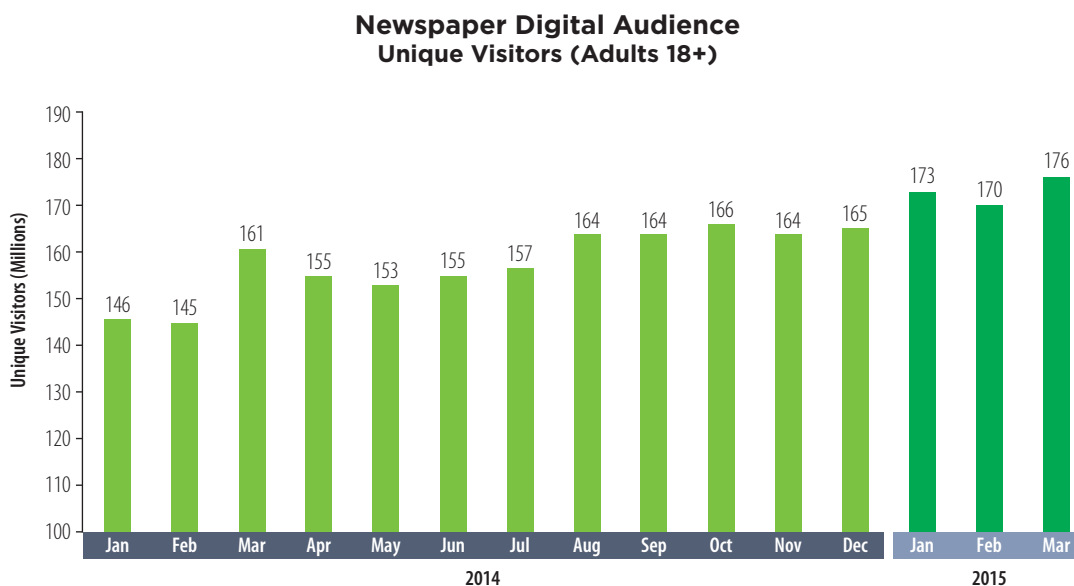
- ◆ Fifty-eight percent of Millennials engage with newspaper media in print or online in an average week.
- ◆ Two-thirds of Millennials who are college graduates engage with newspaper media in print or online in a typical week, as do two-thirds of Millennials with household incomes of \$100,000 or more.
- ◆ Millennials are 39 percent more likely to consume newspaper content on a mobile device than the average adult who does so.
- ◆ More than half (56 percent) of Millennials who use an iPhone to access newspaper digital content during an average month read a newspaper in print during a typical week.
- ◆ Seven in ten Millennials who spent \$500 or more on men's business clothing in the past year engage with newspaper content in print or online in a typical week.

## Digital Audience Details

The digital audience engaged with newspaper content keeps growing. It reached a new peak in March 2015, totaling 176 million adult unique visitors. The count was a 10 percent increase from the 161 million unique visitors measured by comScore in March 2014.

The data also revealed:

- ◆ Readers who use only mobile devices, rather than desktop or laptop computers, to consume newspaper digital content increased 53 percent in March 2015 from the same month the previous year, to 71 million adult unique visitors.
- ◆ Newspaper digital content net reach was highest for women age 25-34 and women 35-44, at 92 percent for both groups.
- ◆ The newspaper digital audience was slightly younger than the overall Internet audience, with 56 percent of the unique visitors for newspaper digital under the age of 45 compared to 53 percent of the total Internet audience.



## Total audience: The newspaper readership profile across platforms

How to read this table: 49 percent of the U.S. adult population is male and 51 percent is female. Of the adults who read a print newspaper in the past week, 48 percent were men and 52 percent were women. For the adults who read a newspaper in print or digital form during the past week, including using mobile devices, 51 percent were men and 49 percent were women. Of those who visited a newspaper website in the past month, 51 percent were men and 49 percent were women. For those adults who used a mobile device to read newspaper content in the past month, 53 percent were men and 47 percent were women.

## Newspaper Readership Profile

Demographic Composition by Gender, Age, Education and Household Income	U.S. Adult Population	Past Week Newspaper Print Readers	Past Week Newspaper Print or Digital Readers (including Mobile)	Visited Any Newspaper Website Past 30 Days	Used Mobile Device to Read Newspapers Past 30 Days
<b>Gender</b>					
Men	49%	48%	49%	51%	53%
Women	51	52	51	49	47
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Age</b>					
18-34	30%	23%	27%	36%	42%
35-44	17	14	16	21	23
45-54	18	19	18	19	18
55-64	17	19	18	15	12
65 or Older	19	25	21	9	6
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Level of Education</b>					
High School Graduate or less	43%	39%	38%	26%	27%
Some College 1-3 years-not Graduate or	31	32	32	32	32
College Graduate (4 year College)	15	15	16	22	21
Any Post Graduate Work or Post Graduate	11	13	14	20	20
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Household Income</b>					
Less than \$50K	50%	47%	45%	34%	35%
\$50K-\$99K	30	31	32	35	33
\$100K-\$249K	17	19	20	26	27
\$250,000 or more	3	3	3	5	5
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Scarborough USA + 2014 Release 2.

# Distribution Management

Newspapers are continuing to make strides improving the cost effectiveness and versatility of their distribution processes.

- ◆ Distribution partnerships and alliances have improved the profitability of routes that otherwise would be negatively impacted by declining home delivery penetration.
- ◆ The number of routes continues to decline as circulation departments consolidate contracts and improve routes for more efficient delivery.
- ◆ The number of home delivery subscribers per carrier continues to decline, in part due to lower home delivery penetration and delivery of other titles.
- ◆ The move to large distributorships from smaller routes, whether previously buy/sell or fee-based, is apparent in the data. The result is that staffing is increasingly dependent upon contractors (fee based/agents) rather than employees. This is particularly true among larger circulation newspapers.
- ◆ The traditional district manager structure continues to dominate the industry (84 percent), but there has been a perceptible movement in the direction of outsourcing the district manager function—either market-wide or in select geographic areas.
- ◆ Carrier turnover continues to decline, and district manager turnover remains very limited.
- ◆ Delivery of other publications beyond contiguous or national newspapers has increased, especially phone books, catalogs and magazines.



These new efficiencies are being achieved despite local newspapers maintaining distribution systems that meet the ZIP code-level demands of advertisers and deliver multiple titles—all while maintaining consistent early-morning levels of service for their home delivery subscribers.

These more flexible operations also provide local newspapers the ability to cost effectively deliver their own niche products that otherwise would not be profitable if burdened with the full cost of postage or an outside delivery business.

These operational improvements have been accomplished by newspapers leveraging their relationships with independent contractors, applying technology, retaining a larger share of retail price increases and taking excess capacity out of the system through partnerships, alliances and consolidations.

## Accelerating change in the distribution structure

In the last decade, there have been dramatic improvements in operating efficiencies in home delivery distribution. Newspapers have squeezed out costs while adding the distribution of additional titles. This has been accomplished by distribution partnerships, alliances, occasionally later press times, restructuring delivery routes and outsourcing functions such as distribution center operations and transportation. Desktop technology in mapping, the analysis of subscribers and communications has also contributed to efficiencies.

Although the percentage of newspapers that have converted their entire distribution to a system of large distributorships remains small, the data is directional and the result is a trend towards outsourcing traditional district manager functions to independent contractors or distribution companies. These newspapers have elected to make the move after weighing the issues of cost versus a perceived lack of control. The analysis then shifts to the costs of maintaining a field staff of employees versus a lower wholesale rate or higher piece rate as compensation to the outside distributor.

**Changes in Distribution Structure**

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

The willingness to partner with other newspaper companies or distributors is increasing among the newspapers participating in this year's study.

**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

Most traditional daily newspapers have adopted a strategy of providing seven-day delivery service to subscribers willing to pay a premium for days that would not be profitable based upon the level of advertising revenue for each edition. The route structure then remains intact and is subsidized by the delivery of other titles.

A minority of newspapers have taken the approach of eliminating distribution entirely on less profitable days of the week and relying on digital delivery of content for continuity. The number has remained small, and Monday has been the most popular day to suspend delivery.



### Stopped Printing a Newspaper any Days of the Week

	2014	2011
	in past 24 months	in past 12 months
Yes	7%	7%
No	93	93

### Stopped Home Delivery and/or Single Copy (Net)

	2014	2011*
Monday	5%	3%
Tuesday	1	1
Wednesday	1	1
Thursday	1	0
Friday	-	1
Saturday	1	2
Sunday	-	2

## Changes in the business plan impact the carrier and the relationship

Along with suspending distribution entirely, the most foundational change newspapers have undertaken is the adoption of a structure more reliant on large independent distributors that eliminate the traditional district manager function, as discussed above. In many cases, it is understood that these contractors will subcontract with individual carriers that will do all or a portion of the actual delivery.

While the actual number of newspapers that have made this change remains small, the option to outsource the traditional employee duties of managing distribution at the street level continues to grow. This contributes to the ongoing trend towards adult independent contractors who are compensated on a “per piece” and/or fee based relationship that is measurable in this year’s study.

Although there are still youth carriers delivering newspapers in a number of smaller markets, most newspapers have completed the transition to a carrier force of adult independent contractors for home delivery.

The transition to compensating carriers on a piece rate, rather than the traditional buy/sell relationship, is also apparent in responses from individual newspapers. This year’s survey marks the first time more newspapers reported their contracts with carriers were based upon payment per piece delivered than the traditional buy/sell relationship.

### Newspapers Reporting Home Delivery by:

	2014	2011	2008
Adult Employee Carriers	5.3%	3.0%	3.4%
Adult Buy/Sell Independent Contractors	35.5	55.4	60.4
Adult Independent Contractors Fee Based/Agents	59.2	41.6	36.2

This move is consistent with the current scenario of almost all subscribers being billed directly by the newspaper company and the move towards carriers delivering multiple titles. The independent contractor’s business model has shifted primarily to that of a delivery agent for the newspaper.

Industry-wide, the typical number of home delivered subscribers per carrier continues to decline—both daily and on weekends.

**Trend: Median Number of Daily Home Delivery Subscribers Per Route By Type of Carrier**

	Youth Route			Adult Route		
	2014	2011	2008	2014	2011	2008
<b>Industry:</b>						
Monday-Friday Delivery	39	44	45	150	179	200
Sunday-Delivery	40	50	50	200	206	225

This is in part due to declining traditional home delivery penetration, but these counts do not include delivery of other titles and new unpaid products such as “opt-in” or “requestor” circulation.

Many factors contribute to turnover among carriers and the frontline distribution staff. Regardless of whether turnover is a result of a slow economy, fuel prices or internal changes in the nature of the tasks at hand, the new distribution model has not generated additional turnover among field personnel.

**Turnover Percentage Past 12 Months**

	Home-Delivery Carrier			District Manager		
	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>32%</b>	<b>36%</b>	<b>40%</b>	<b>1%</b>	<b>0%*</b>	<b>12%</b>
25,000 and under	20	26	30	-	0	12
25,001-50,000	48	60	42	16	10	25
50,001-100,000	45	42	61	15	7	9
100,001-200,000	43	51	69	10	9	10
200,001+	46	26	55	10	8	5

## Measurable improvements in operating efficiencies

As more newspapers move to variable piece rate plans and develop more efficient route structures, there is less need for route allowances and subsidies. The change is clearly apparent in the reduced investment on subsidies and allowances in 2014.

**Trend: Median Amount Spent on Route Subsidies/Allowances**

	2014	2011	2008
<b>Industry</b>	<b>\$76,703</b>	<b>\$145,000</b>	<b>\$120,000</b>

The shift to a pure “piece rate” compensation approach, while retaining the independent contractor relationship, has also more easily facilitated newspapers retaining a larger share of the recent home delivery price increases. The variable costs of delivery have not risen as dramatically as home delivery and single copy prices.

#### Median Carrier Compensation on a Per-Copy Basis\*

	Daily Home Delivery	Sunday Home Delivery	Daily Single Copy	Sunday Single Copy
<b>Industry</b>	<b>\$0.15</b>	<b>\$0.22</b>	<b>\$0.20</b>	<b>\$0.34</b>
25,000 and under	0.15	0.19	0.20	0.40
25,001-50,000	0.15	0.24	0.10	0.25
50,001-100,000	0.15	0.22	0.20	0.35
100,001-200,000	0.16	0.31	0.22	0.31
200,001+	0.16	0.25	0.21	0.51

The number of full and part-time employees dedicated to home delivery has also remained fairly stable overall—though it has declined at larger newspapers where outsourcing has been more prevalent.

#### Trend: Number of Employees Dedicated to Home Delivery Distribution

	Full-time			Part-Time		
	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>1</b>	<b>1</b>	<b>2</b>
25,000 and under	2	2	2	0	1	1
25,001-50,000	7	8	7	4	2	2
50,001-100,000	14	13	15	4	4	6
100,001-200,000	13	27	31	4	5	10
200,001+	21	37	43	7	5	19

Circulation departments are adopting technology such as route planning software to design more efficient route structures. One in five newspapers also now report using GPS to track delivery.

#### Do You Use GPS Technology to Track and Audit Routes?

<b>Industry</b>	<b>19%</b>
25,000 and under	16
25,001-50,000	24
50,001-100,000	22
100,001-200,000	27
200,001+	14

The number of titles newspapers deliver in addition to their own products has increased in the last five years, along with the volume.

### Number of Newspapers Delivered Per Day In Addition To Your Own

2014 Medians	Titles	Daily	Sunday
		# of copies	# of copies
<b>Industry</b>	<b>4</b>	<b>3,800</b>	<b>4,044</b>
25,000 and under	2	733	2,250
25,001-50,000	4	3,739	2,500
50,001-100,000	3	8,000	11,000
100,001-200,000	10	12,576	6,653
200,001+	7	41,300	25,500

In addition to delivery of national newspapers and contiguous regional and local newspapers, an increasing number of newspapers are delivering magazines and other products such as catalogs to generate additional revenue and enhance the profitability of their routes.

### Trend: Publications and Products Delivered

	Magazines			Other		
	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>44%*</b>	<b>30</b>	<b>14</b>	<b>47%**</b>	<b>36%</b>	<b>23%</b>
25,000 and under	25	12	11	83	64	25
25,001-50,000	43	20	6	29	20	25
50,001-100,000	27	47	24	64	24	16
100,001-200,000	70	31	29	20	25	26
200,001+	80	50	25	-	33	11

\* 29% national magazines/31% local magazines.

\*\* 47% other print products/7% other non-print products.

## Summary: Change is having a positive impact on the bottom line

The restructuring of the distribution functions continues to have a positive impact on the bottom line. The changes that were initiated ten years ago to meet advertiser needs with a more sophisticated operation have evolved, with the help of technology, into a streamlined distribution structure. Today's operations accommodate the delivery of multiple newspaper titles and other publications that have alleviated the negative impact of decreased home delivery penetration and served as a source of additional revenues.

Although leaner than ever before, newspapers continue to look for opportunities for the distribution system to be less costly through outsourcing, as well as ensuring sustainability by generating revenue from the homes the carrier drives by each day.

# Marketing Home Delivery — and Digital Content

Over the past three years, the focus has remained on increasing revenue and improving the profitability of new print plus digital subscriptions. Newspapers have executed aggressive pricing programs based in part on the incremental value of access to digital content.

Three out of four newspapers are marketing subscriptions that include digital access which would not otherwise be available to the reader. The seven-day print subscription, with digital access, has become the premium subscription. In many cases, these subscriptions are marketed with a membership appeal similar to traditional loyalty programs with new digital components.

A new marketing challenge is compelling the subscriber to activate and use the digital offerings. In addition to building traffic, the engagement aspect of multiplatform access to newspaper content is associated with improved print retention. The intent is for the reader to associate an improved value proposition that includes readily available multiplatform access in return for a higher subscription price.

Reader revenues are an increasingly essential portion of the newspaper business model, and print circulation continues to correlate with the equally important revenue generated from advertising inserts. Newspapers are effectively adding additional free, opt-in products to offset lost coverage from price-related losses in home delivery penetration. They are also more aggressively marketing print in the form of less than seven-day subscriptions that provide readers with delivery of the days best supported by advertisers.

The emphasis on targeting pricing and sales efforts continues. Together, this strategy provides more profitable circulation in terms both of advertising revenue and higher improved subscriber retention. This is evident in the shift towards selling new subscriptions that require payment at the time of sale and allocating resources to the sales channels associated with longer-lasting subscriptions.

Home delivery comprises 81 percent of daily print circulation and 74 percent of Sunday print circulation. And despite the growth of digital subscriptions, home delivery accounts for 74 percent of total circulation and 69 percent of Sunday circulation. Marketing home delivery effectively and efficiently is the key to profitability for most newspapers.



## The subscription sales strategy now includes a digital component

The majority of the industry's new subscriptions are now sold with a digital component. This is true for all size newspapers except those at or below 25,000 circulation. The digital component has been positioned as part of the value proposition and justification for higher-priced subscription rates. A low-cost revenue stream from digital-only subscribers also exists for the three out of four newspapers that limit complete digital access to paid subscribers.

**Percentage of Paid Starts that are:**

	Print Exclusively	Digital Exclusively	Print + Digital
	2014	2014	2014
<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

The decreased emphasis on selling seven-day subscriptions is evident in subscription sales by individual newspapers. This ongoing trend, which first became apparent five years ago, is particularly true among larger newspapers.

The reduction in sales efforts of seven-day subscriptions coincides with an increase in Sunday-plus digital subscriptions. Taken together, the data clearly documents a strategy of marketing Sunday-only or another package with less than seven-day print. Regardless of whether the consumer makes the choice due to price or lifestyle, the demand is also evident in the increased volume of Sunday-only voluntary starts.

**Trend: New Orders For Daily and Sunday Package**

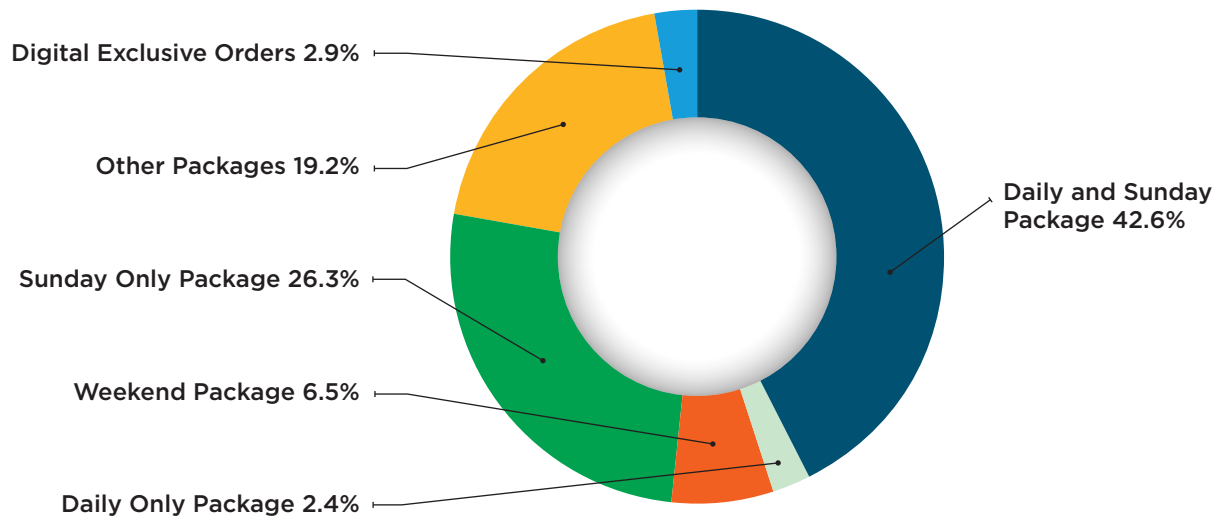
	Subscriptions Sold			Voluntary Starts		
	2014	2008	diff.	2014	2008	diff.
25,000 and under	1,560	1,800	-13.3%	1,000	884	13.1%
25,001-50,000	5,140	5,584	-8.0%	2,400	1,832	31.0%
50,001-100,000	8,150	13,525	-39.7%	3,415	3,001	13.8%
100,001+	13,376	32,490	-58.8%	5,523	8,134	-32.1%

**Trend: New Orders for Sunday Only**

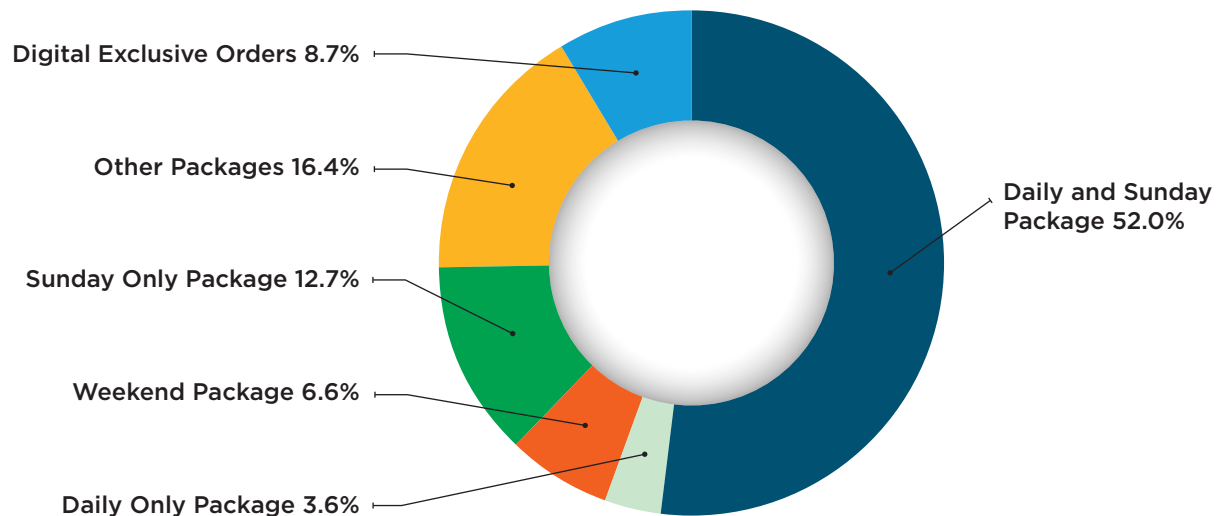
	Subscriptions Sold			Voluntary Starts		
	2014	2008	diff.	2014	2008	diff.
25,000 and under	416	125	232.8%	170	100	70.0%
25,001-50,000	1,815	933	94.5%	346	257	34.6%
50,001-100,000	3,706	3,120	18.8%	1,003	608	65.0%
100,001+	10,925	9,998	9.3%	3,093	2,014	53.6%

The decrease in weekday starts reflects both consumer attitudes and newspapers' profitability strategies. The alignment of subscriptions sold and voluntary starts does indicate a continued interest among consumers in the seven-day package. The difference in Sunday-only sales and voluntary starts is more likely due to the aggressive sales efforts of Sunday only, perhaps with the complete digital component.

### Type and Frequency of Subscriptions Sold



### Voluntary Starts Type and Frequency



There is also a disparity in digital-only sales and voluntary starts. In this case, it may have more to do with the definition of "voluntary." If a newspaper makes a compelling offer when a non-subscriber hits a "paywall" and they respond by starting a digital subscription, that may be reported as a voluntary start of a direct response order. Newspapers differ on how they report this transaction.

The disproportionate percentage of starts reported as voluntary also reflects the difficulty of selling digital-only subscriptions. In most cases, this is simply because digital-only is a narrow audience and an impulse decision by a user who is already familiar with the newspaper's multiplatform products.

The result of these marketing strategies is that less than half of home delivery subscribers receive the print newspaper seven days a week. The category labeled "other" is a combination of two or more days but less than seven days.

#### Composition of Subscriber Base - Home Delivery Subscription Type/FOD\*

	7 Day	Sunday Only	Other Combinations
25,000 and under	54.2%	8.8%	37.0%
25,001-50,000	52.9	27.7	19.4
50,001-100,000	45.7	16.9	37.4
100,001+	38.8	17.1	44.1
<b>Total</b>	<b>46.2</b>	<b>17.3</b>	<b>36.5</b>

\*Mather economics: 11/2014.

This presents newspapers with the challenge of marketing seven-day readership with less than seven-day print. To date, the industry as a whole has been only partially successful in this effort. Although many print readers may be accessing newspaper content digitally without registering and activating a personalized digital subscription, newspapers report that only one in four of their print subscribers are registered and activated.

#### Median Percentage of Eligible Subscriber Base that has Activated

	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

This data is supported by the responses of relatively low access to the replica edition. While the replica edition is a niche product targeted to print subscribers making a digital transition, the percentage of subscribers that have sampled the product is lower than many publishers might expect.

#### Median Percentage of Subscribers who have Accessed their Digital Replica Edition

	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



## Higher subscription rates and the revenue impact

The move to higher subscription prices for many newspapers has been supported by the value proposition of cross-platform access to newspaper content. Many newspapers have used selective pricing, with some subscribers experiencing larger increases than others. This strategy is based on charging the highest prices to the subscribers with the highest propensity to pay a higher rate.

### Do you Charge Different Rates for Different Demographic or Geographic Characteristics?

	Yes	No
<b>Industry</b>	<b>51%</b>	<b>49%</b>
25,000 and under	40	60
25,001-50,000	58	42
50,001-100,000	75	25
100,001-200,000	54	46
200,001+	75	25

Overall, the industry reported price increases of almost 10 percent a year for the past six years for a seven-day subscription. For this reason and the fact that newspapers increasingly charge different rates to different households, it may be more relevant to benchmark industry net revenue for a seven-day subscription at \$4.60 a week.

### Trend: Price for One Week Subscription - Daily and Sunday

	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	<b>47.5</b>
25,001-50,000	5.53	4.50	3.85	<b>43.6</b>
50,001-100,000	6.00	4.44	4.10	<b>46.3</b>
100,001-200,000	6.65	5.11	3.94	<b>68.8</b>
200,001+	6.60	5.55	4.88	<b>35.2</b>

### Average Net Revenue for One Week of Daily and Sunday Home Delivery Package

	2014
<b>Industry</b>	<b>\$4.60</b>
25,000 and under	3.79
25,001-50,000	5.10
50,001-100,000	4.30
100,001+	4.96

The strategy of many newspapers has been to price the seven-day subscription as a premium for loyal customers that want to continue seven-day delivery. Price increases for weekend and Sunday-only home delivery have been more modest due in part to advertiser insert support and a focus on maintaining Sunday print penetration levels. The industry net revenue for a Sunday-only subscription is \$1.90 a week.

**Trend: Price for One Week of Subscription Package - Sunday Only**

	2014	2011	2008	5 Year Inc.
<b>Industry</b>	<b>\$2.49</b>	<b>\$2.00</b>	<b>\$1.86</b>	<b>33.87%</b>
25,000 and under	2.03	1.75	1.49	<b>36.24</b>
25,001-50,000	2.75	2.00	1.86	<b>47.85</b>
50,001-100,000	2.45	2.10	1.94	<b>26.29</b>
100,001-200,000	2.95	2.28	1.96	<b>50.51</b>
200,001+	2.87	2.12	2.58	<b>11.24</b>

Individual newspapers have benefited from revenue gains by changes associated with the move to digital that do not have a direct impact on expenses. New revenue sources include digital-only subscriptions and the rationale that there is no longer a need to provide vacation credits because subscribers have 24/7 multiplatform access to newspaper content.

**The Monthly Price and Average Net Revenue Price for One Month Subscription Package Digital-only Package**

	Price	Net Revenue
	2014	
<b>Industry</b>	<b>\$11.49</b>	<b>\$9.99</b>
25,000 and under	10.99	10.00
25,001-50,000	8.50	7.99
50,001-100,000	14.99	10.91
100,001+	12.00	9.99

The majority of newspapers over 50,000 circulation have stopped giving full vacation credit to subscribers, while most smaller newspapers have not embraced this change.

**Do you Credit for Vacation Stops?**

	2014	
	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

The revenue strategy as it relates to discounts has also shifted. Although newspapers still aggressively discount the stated price to acquire new subscribers, the practice of providing lower rates to subscribers on recurring payment plans and those that pay for extended terms in advance has become less prevalent.

### Trend: Offer Lower Subscription Rate for Easy Payment Plan

	2014	2011	2008
<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

These changes in strategy are most evident among the largest newspapers. The combined revenue impact of minimizing these discounts, along with a reduction in vacation credits, can be substantial.

### Trend: Offer Discounts for Long-Term Advance Payment

	2014	2011	2008
	Yes	Yes	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

Along with discouraging vacation credits, 16 percent of newspapers have initiated a “set-up fee” for new starts and restarts for subscriptions listed as permanent stops.

### Trend: Charging Set up Fee for New Accounts

	2014	
	Yes	No
<b>Industry</b>	<b>16%</b>	<b>84%</b>
25,000 and under	11	89
25,001-50,000	21	79
50,001-100,000	24	76
100,001-200,000	31	69
200,001+	13	87

## Using a selective sales effort to improve overall subscriber retention

The challenge in raising rates is to retain new and long-term subscribers and manage subscriber churn to acceptable levels for a given market. The results from this year's study indicate a continued emphasis on acquiring the subscribers most likely to be retained and applying practices to retain current subscribers.

Evidence of this shift includes the expectation of payment at the time the subscription is sold, a dramatic change over the last six years. Currently, only 15 percent of subscriptions are started with a promise to pay. Almost half of new subscriptions are sold using a debit or credit card, and many are on recurring payment plans.

**Trend: How Subscription Sales Effort is Transacted**

	Credit/Debit Card		Cash		No Payment	
	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	39	36	48	40	14	24
25,001-50,000	52	38	26	33	14	29
50,001-100,000	50	42	24	28	21	30
100,001-200,000	59	39	22	23	11	39
200,001+	67	42	36	18	7	40

Newspapers continue to report success converting current subscribers to recurring payment plans, as well as starting new subscriptions with automatic payment. More than one-third of subscribers are now on a recurring payment plan, either with a credit card or bank draft arrangement.

**Percentage of Subscribers Paying by...**

	Credit Cards	Recurring Bank Debit	Recurring Credit Cards	Internet Transactions	Bill by e-mail
	2014	2014	2014	2014	2014
<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

Communication with subscribers impacts retention, and one of the most frequent topics is asking the customer to continue to pay for their subscription. Less than 40 percent of subscribers remain on the traditional "bill by mail" process.

Newspapers continue to refine the process in terms of sequencing bills and determining how much time to allow after the subscription expires before delivery is stopped. Increasingly, newspapers are segmenting this time period and basing the number of days of delivery on the subscriber profile and past behavior.

#### Grace Period Varies by...

	Subscription Characteristics	Subscription Types	None of the Above
<b>Industry</b>	<b>18%</b>	<b>30%</b>	<b>59%</b>
25,000 and under	16	32	60
25,001-50,000	26	21	63
50,001-100,000	21	29	50
100,001-200,000	25	42	50
200,001+	-	25	75

Thirty days is the median time newspapers continue delivery after expiration. The time varies for the 40 percent of newspapers that segment subscribers by past history. The number of newspapers that allow less than 15 days or more than 45 days has declined consistently during the history of this 15-year study.

#### Trend: Days Service is Continued After Expiration or Start Date

	New Starts 2014	Renewals 2014
1-15	13	10
16-30	40	36
31-45	25	25
46-60	5	8
61-90	17	21
91 days or more	1	1

New subscriber retention rates continue to be highest among subscribers that are on a recurring payment program, as compared to customers billed by newspapers through the mail. The number of carrier collect subscriptions is very small and limited to a small number of newspapers.

#### New Start Retention Rates by Payment Type

	13-Weeks	26-Weeks	52-Weeks
	<b>2014</b>		
Credit Card	72%	67	61
Bank Debit	70	65	62
Pay-by-mail	67	58	50
Carrier Collect	87	80	71
Other	82	79	70

An increasing number of newspapers are adding loyalty (sometimes called membership) programs. In some cases, these programs are limited to seven-day premium subscribers. Twenty nine percent of responding newspapers offer these programs, which are intended to add value to higher-priced subscriptions. Newspapers vary widely in terms of what is included. The acceptance of email communications and use of dedicated portions of a newspaper website and mobile applications all make clear that these programs are not necessarily a costly retention tool.

**Have Customer Loyalty/Value-Added or Frequent Reader Program**

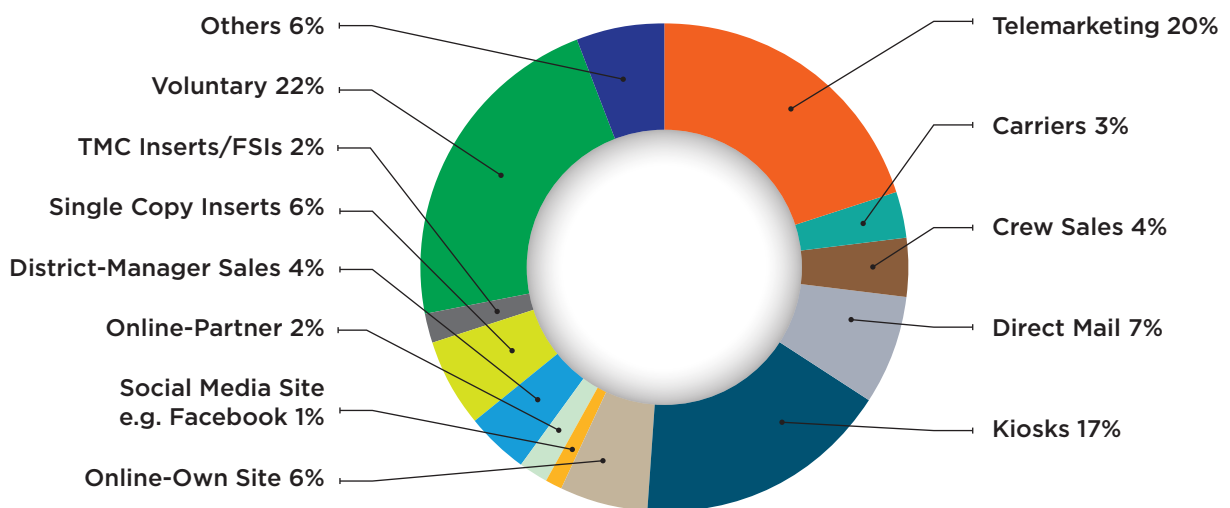
	2014	2011
<b>Industry</b>	<b>29%</b>	<b>23%</b>
25,000 and under	16	15
25,001-50,000	40	25
50,001-100,000	35	26
100,001-200,000	57	67
200,001+	67	50

## The mix of subscription sales channels continues to evolve towards improved retention

Voluntary starts, meaning requests to start a subscription that cannot be tied directly to any sales source, remain the largest source of new subscriptions, accounting for more than one in five new subscriptions.

Despite all the changes in marketing home delivery in the last ten years, voluntary starts have remained at this consistent level of total new starts. This means that the number of voluntary starts has moved downward as the volume of new starts has declined. What has changed is in the mix of subscriptions sold.

**Source of New Subscriptions**



The sales model continues to edge away from what have traditionally been viewed as lower retention sales sources. Due to regulations and the reduction in landlines, the telemarketing share continues to decline. The share of intercept or kiosk sales has increased in response, with its 52-week retention comparable to telemarketing sales but at a higher cost.

**Trend: Percent of Annual Home Delivery Sales Sold by...**

Excluding Voluntary	Cost Per Order			
	2014	2011	2008	2014
a. Telemarketing	26%	27%	32%	\$28.00
b. Carriers	4	5	7	15.00
c. Crew Sales	5	6	11	37.50
d. Direct Mail	9	9	7	41.00
e. Kiosks	22	18	16	48.00
• Internet (Net)*	-	6	4	
f. Own site	8			5.00
g. Social media site e.g. Facebook	1			20.50
h. Internet partner	3			20.50
i. District-Manager Sales	5	6	5	10.00
• Single Copy & TMC Inserts/FSIs		9	8	12.00
j. Single Copy	6			
k. TMC Inserts/FSI's	2			
l. Other	10	13	9	15.00

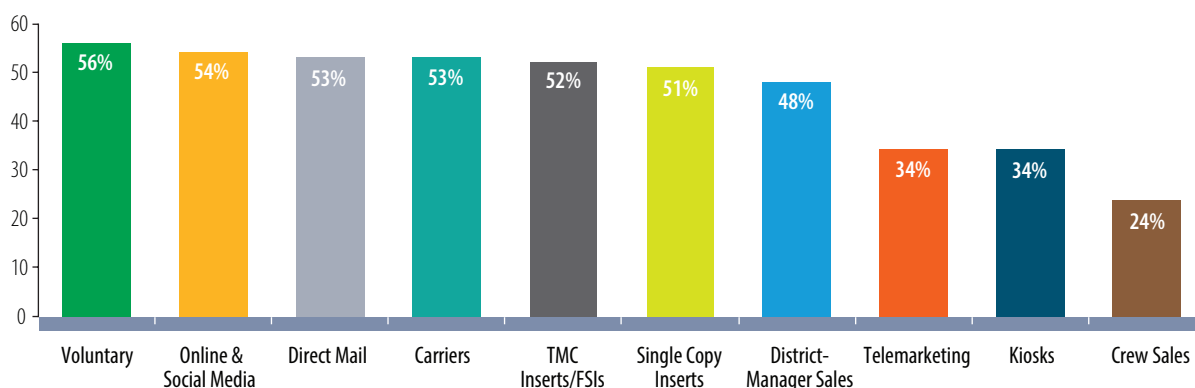
Newspapers are also placing more resources in direct response sales channels, including direct mail, email, online programs, social media and traditional inserts in single copy and nonsubscriber products.

The incremental cost per order has also increased for every sales source. For example, the cost of kiosk commissioned starts, excluding overhead, staffing and discounts, has increased to \$48, followed by \$41 for direct mail. In some cases, the higher cost per order in the personal sales channels, such as kiosk and telemarketing, is due to incentives to secure advance payment, generating an ROI on those higher costs. Despite higher incremental costs, this year's study measured the full cost per new subscription to be similar to past studies, perhaps due to lower overhead costs.

The industry mean, or average cost per new subscription is \$59.94. The median is \$35.49 for acquiring new subscribers. Retention rates by sales source provide insight into the cost per unit of circulation among the various sources. Direct response sales become the lowest cost order once the 52 week retention is factored into the cost of acquiring and retaining a subscriber for a year. At the end of a year, more than half of direct response subscriptions are still active, while only one in three telemarketing and kiosk-secured subscribers are still receiving the paper.

There have been small but consistent gains in subscriber retention in the last six years. The change is most apparent when comparing the percent of subscribers still active after one year. This is primarily the result of the focus on more selective sales and improved retention programs, and these gains have been achieved in spite of higher subscription rates. The result is improved profitability, but due to the lower volume of starts, as well as stops, the impact is also lower paid home delivery circulation.

### Retention Rates by Sales Source Percent Active 52 Weeks



The direct response sales sources continue to yield the highest retention rates and the best value after a year. The retention rates are comparable to voluntary starts. New subscriptions from kiosk and intercept sales are the most expensive in terms of cost per order and although the 13 week retention is reported average for all sources, only one in three subscribers are still active at the end of the year. Although more expensive, the retention rate after 52 weeks is the same as telemarketing.

### Retention Rates by Sales Source

	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
i. District-Manager Sales	72	57	48
• Single Copy inserts	76	65	51
j. TMC inserts/FSIs	76	64	52
k. Voluntary	76	67	56

### Trend: New Start Retention Rates

Print*	13-Weeks			26-Weeks			52-Weeks		
	2014	2011	2008	2014	2011	2008	2014	2011	2008
Total Subscription Sales	65	67	66	53	53	51	44	41	41
Total Voluntary Starts	73	74	75	63	64	64	55	55	53
Total Starts	71	70	70	58	56	56	49	44	45



## The digital difference in sales and subscriber retention

Digital-only starts were measured separately in this study, and retention rates were found to be higher for digital than print sales. This is to be expected, because digital is a new product that has met a demand in the market, and newspapers have yet to fully tap more marginal prospects. Most of the subscriptions that are sold by newspapers are through high-retention sales channels to targeted audiences of current readers.

### Trend: New Start Retention Rates - Digital Exclusive

Digital**	13-Weeks	26-Weeks	52-Weeks
Total Subscription Sales	78%	67%	57%
Total Voluntary Starts	80	69	61
Total Starts	81	70	61
	N=51	N=49	N=53

The majority of new digital sales are derived from an offer on the newspaper site, often when a reader is stopped and asked for payment on a limited-access site. The “other” category in the chart below includes sales made by email solicitations.

### Percent of Annual Digital Sales Sold by...

	2014
a. Telemarketing	3%
b. Carriers	-
c. Crew Sales	-
d. Direct Mail	2
e. Kiosks	2
• Internet	
f. Own site	51
g. Social media site e.g. Facebook	3
h. Internet partner	2
i. District-Manager Sales	1
• Single copy/TMC Inserts/FSIs	
j. Single Copy Inserts	-
k. TMC Inserts/FSI's	1
l. Voluntary	25
m. Other	8

The overall subscriber churn rate has not changed significantly in the last three years. The lower volume of sales and improved retention practices appear to have offset higher prices and less frequent readership. The self-reported digital exclusive churn rates are lower, which is consistent with the higher 52-week retention data.

#### Home Delivery Subscriber Churn Rates

2014	Daily	Saturday	Sunday	Digital Exclusive*
<b>Industry</b>	<b>33%</b>	<b>38%</b>	<b>40%</b>	<b>28%</b>
25,000 and under	38	44	41	30
25,001-50,000	33	35	37	18
50,001-100,000	42	41	47	32
100,001-200,000	33	37	46	25
200,001+	26	41	34	41

\*This churn rate is self-reported, retention rate shown elsewhere is calculated.

### Summary: Better decision making to improve profitability

The profitability focus of newspapers' audience building and circulation efforts is reflected in this year's data. Newspapers are selectively charging significantly more for print subscriptions and being more analytical in their pricing and discounting strategies. Where incentives and investments can result in measurable improvements in subscriber retention, there remains a willingness to spend to retain subscribers.

The most significant savings are likely to be in the reluctance of newspapers to sell additional subscriptions beyond what the organization has set as an optimum level of paid print circulation. The responses to this year's study do not point to softer demand for home delivery as much as a greater focus on improving revenue while reducing costs.

# Single Copy Sales— Building Audience & Revenue

The pursuit of the occasional reader has become a more revenue-focused part of the circulation and audience building mission. Higher retail prices in pursuit of increased revenues have triggered a sequence of events that has changed the longstanding formula for successfully retailing the newspaper.

The most popular price points of one dollar for a daily newspaper and two dollars for a Sunday edition have resulted in lower sales volumes and the accelerated move from newsracks to over-the-counter locations. Higher price points have also made the task of minimizing sellouts while maximizing sales increasingly challenging.

Despite lower sales volumes, retail sales of the newspaper have become an increasingly important source of revenue and continue to deliver a necessary slice of the younger newspaper audience.

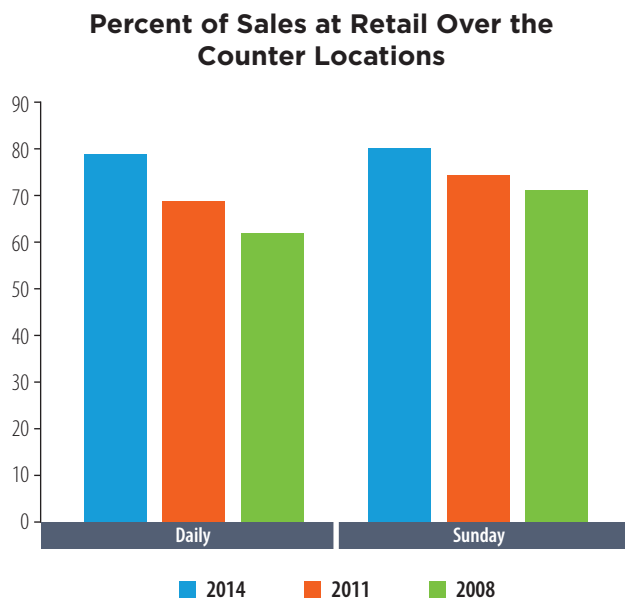


- ◆ Single copy prices continue to climb and the median price is now \$1.00 daily, double the price from five years ago. The most popular price point among newspapers with less than 25,000 circulation is 75 cents.
- ◆ Sunday single copy prices have also increased, though somewhat more slowly. The most popular price point is now \$2.00 per copy. The largest newspapers are likely to charge \$2.50, and many of the smaller newspapers charge \$1.50 a copy.
- ◆ Eight out of ten weekday copies are now sold over the counter at retail locations, and 20 percent are sold at coin-operated newsracks. Less than 15 percent of Sunday sales are sold through newsracks.
- ◆ There has been a dramatic cut in the number of newsracks “on the street,” but newspapers have increased the number of retail locations to offset the loss in outlets.
- ◆ Despite the lower volume of sales and a smaller workforce, newspapers have, in most cases, managed to hold daily and Sunday sellouts at or below 20 percent.
- ◆ The majority of newspapers reported more than 25 percent of their sales are now scan based. In response to the question on scan based trading losses, 63.4 percent reported write-offs of 10 percent or less.\*
- ◆ Convenience stores continue to be the most important outlet for weekday sales, rivaled by grocery stores on Sunday. Wal-Mart is the single most important retailer, with the majority of newspapers reporting multiple locations inside stores.\*

\*Source: Member Survey 4th Quarter 2014 “Single Copy Snapshot”.

## Single copy sales channels: The shift to over the counter sales

Today's single copy prices often exceed the number of coins a newspaper reader might be carrying in their pocket or purse. The response has been a shift to over the counter sales at retail locations. Newsracks now account for only 20 percent of total daily single copy sales and 15 percent of Sunday sales.



This move has been consistent with higher cover prices, and it reflects the initiative taken by newspapers to capture the impulse sale provided by effective displays at high-traffic retail shopping and dining locations.

Accordingly, the number of coin-operated newsracks in operation has declined, while the number of over the counter locations has increased. The shift has been most dramatic among larger circulation newspapers.

The need to reduce the number of newsracks is evident when tracking sales per outlet. The median average newsrack sales per outlet for many newspapers has declined to less than five sales per outlet, both daily and Sunday.

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

	2014	2011	2008
<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
<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

**Trend: Sales Per Outlet of Daily Newspaper  
Newsracks**

	2014	2011	2008
<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
<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

The decline in the number of newsracks parallels the declining share of sales that newsracks have generated for the last 15 years. While most of the recent shifts in sales to retail locations can be attributed to higher prices, the success newspapers have had over this longer span of time securing inside retail locations has also contributed to the lower sales per outlet for newsracks.

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

	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

**Trend: Mean Percentage of Sunday Single Copy Sales Sold Through Newsracks**

	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

The effort to increase the number of retail locations has been successful for newspapers, although many of the newest locations are beyond the traditional grocery and convenience store venues, which have already been maximized.

**Trend: Median Number of Retail/Over the Counter Locations for Daily Newspaper**

	2014	2011	2008
<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
<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

The average sale per outlet at retail locations is ten copies for weekday editions and 19 sales for Sundays—double the average sales per newsrack. It follows that the more aggressive a newspaper chooses to be in acquiring new retail locations, the more likely the sales per outlet will decline, although the aggregate impact may be an increase in total volume.

The optimum number of locations is dependent on each newspaper’s profitability goals and desire to increase sales. It is to be expected that replacing low-volume newsrack locations with inside retail locations will lower the average inside sales per outlet.

**Trend: Sales Per Outlet of Daily Newspaper OTC**

	2014	2011	2008
<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 Sunday Newspaper**  
OTC

	2014	2011	2008
<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

## The metrics change with lower volumes and higher prices

Managing the single copy draw at reduced volumes and lower sales per outlet requires resetting expectations for sellouts and return percentages. Although overall return percentages are not a useful management metric without considering returns per outlet, they are used as a gauge of newsprint expense.

**Trend: Median Return Percentages for Daily Editions-Total Combined**

	2014	2011	2008
<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

**Trend: Return Percentages for Sunday Editions-Total Combined**

	2014	2011	2008
<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

Newspapers reported increasing return percentages for 2014, as anticipated due to lower sales and draw numbers. This is not indicative of higher newsprint expenses, because the percentage is likely to be computed on a lower base and the number of copies returned at the individual newspapers may not have increased.

It is also expected that the sellout percentages would also increase because of the difficulty allocating fewer newspapers across a similar number of outlets. This year's survey indicated that one out of five locations sell out on a typical weekday, and 17 percent sell out on Sunday.

#### Median Sellout Percentages for Daily and Sunday Editions

	Daily 2014	Sunday 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

## Single copy pricing: a revenue approach

The increases in revenue from single copy are due to a number of factors beyond the increase in prices. Despite the resultant loss in sales, most single copy price increases have contributed substantially to newspapers' overall revenue. This is due in part to the size of the increase. Raising the cover price by a quarter, from 75 cents to a dollar, is a 33.3 percent increase before factoring in lost sales. The data indicates that most newspapers do share a portion of the increase with retailers and distributors on a buy-sell agreement, but not at the same margins. The result is that the revenue impact to the newspaper may be greater than the increase in price.

#### Trend: Margin for Single Copy Distributors/Agents on a Buy/Sell Agreement

	Daily			Sunday		
	2014	2011	2008	2014	2011	2008
<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



Newspapers have also had success in charging premium rates for select editions. For example, the premium priced Thanksgiving Day edition has become a standard practice, and newspapers are identifying additional days of special value to the reader.

Operationally, circulation departments are faced with the challenge of managing more retail locations and, in many cases, multiple publications without increasing expenses. This year's study indicates that participating newspapers have continued to manage with, in many cases, fewer resources.

#### Trend: Charge Premium on Holiday

	Thanksgiving			Other Holiday
	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

#### Employees Dedicated to Single Copy Distribution

	Full time Employees		
	2014	2011	2008
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
	# of Hours Worked		
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

## Summary: Single copy performance

The single copy sales channel for many newspapers has contributed to the overall revenue gains posted by participating newspapers without measurable increases in expense.

The increased reliance on retail locations and the removal of newsracks from all but the most heavily trafficked locations has increased the percentage of copies sold through a scan-based trading system and opened new outlets to newspapers while presenting increased challenges managing receivables and inventory shrinkage. Newspapers have responded with different approaches to this issue, with varying degrees of success.\* Currently, close to 25 percent of total single copy sales are sold with third-party billing and scan-based transactions.

Among this year's participating newspapers, single copy sales represent 12 percent of weekday print circulation and 20 percent of total Sunday print circulation. Single copy sales contribute 11 percent of Alliance for Audited Media (AAM) total circulation on weekdays and 18 percent of total Sunday circulation. The single copy reader remains an important slice of the cross-platform newspaper audience—as well as a source of increased revenue.

*\* See NAA's 2015 Single Copy Snapshot publication.*

# Customer Service Operations and Performance

The customer service function continues to become more automated and increasingly complex. Many newspapers are relying on outside firms and regional call centers to handle customer inquiries and complaints. The addition of digital subscriptions and limited website access has added complexity to the calls and surfaced the need for more insightful responses.

Delivery of the printed newspaper remains the same in terms of placement, but customer complaints for missed delivery and other issues have ticked upward, along with the number of abandoned calls. The data indicates that newspapers continue to deliver a newspaper on time to where the reader wants it, and three out of four publishers are committed to delivering a replacement newspaper in a timely manner.

The drive to capture more revenue is evident in newspapers moving away from vacation credits, reducing discounts and adding service fees.

- ◆ Customer home delivery complaint levels continued to trend slightly upward both daily and Sunday.
- ◆ The percentage of abandoned calls is up, but the speed of answer is improved.
- ◆ Four in ten newspapers do not provide credit for vacation stops, especially at larger papers.
- ◆ One in six newspapers now charge a setup fee for a new account.
- ◆ Three out of four newspapers continue to guarantee a replacement paper within a certain period of time.



## Providing the basics of a dry, readable newspaper on time

Many newspapers continue to offer the reader a choice in placement of the daily newspaper, with the mix of porch, tube and driveway delivery remaining similar during the last five years.

**Daily Newspapers in NDM Delivered to Porch, Tube or Driveway**

	Porch	Tube	Driveway
	2014	2014	2014
<b>Industry</b>	<b>30%</b>	<b>31%</b>	<b>39%</b>
25,000 and under	29	41	29
25,001-50,000	47	25	28
50,001-100,000	21	18	61
100,001-200,000	19	11	70
200,001+	23	8	69

The complaint levels for daily and Sunday service have increased, as the number of complaints per thousand deliveries has risen during the last five years. The increases are most significant at the largest newspapers and on Sundays, when customers are most likely to call.

**Trend: Complaints Per 1,000 Deliveries**

	Daily			Sunday		
	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>2.0</b>	<b>1.6</b>	<b>1.7</b>	<b>2.9</b>	<b>2.5</b>	<b>2.0</b>
25,000 and under	1.9	1.4	1.3	1.9	2.0	1.0
25,001-50,000	1.9	1.8	1.8	2.4	3.0	2.7
50,001-100,000	1.9	1.7	2.0	3.9	3.0	3.0
100,001-200,000	2.5	2.0	1.9	3.8	4.0	3.3
200,001+	2.9	1.8	1.9	4.0	3.3	2.8

Three out of four newspapers continue to promise a replacement newspaper in a set amount of time after a call for missed delivery or damaged/wet newspapers.

**Guarantee a Replacement Paper within a Certain Period of Time**

	2014	
	Yes	No
<b>Industry</b>	<b>74%</b>	<b>26%</b>
25,000 and under	74	26
25,001-50,000	84	16
50,001-100,000	59	41
100,001-200,000	85	15
200,001+	63	37

Digital delivery of content on multiple platforms provides the reader the newspaper wherever and whenever they choose to read, even on vacation. This added 24/7 availability positions the newspaper to continue to charge for providing content regardless of whether the customer is on vacation. With this point of view, many newspapers are no longer issuing vacation credits.

### Do You Credit for Vacation Stops?

2014		
	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

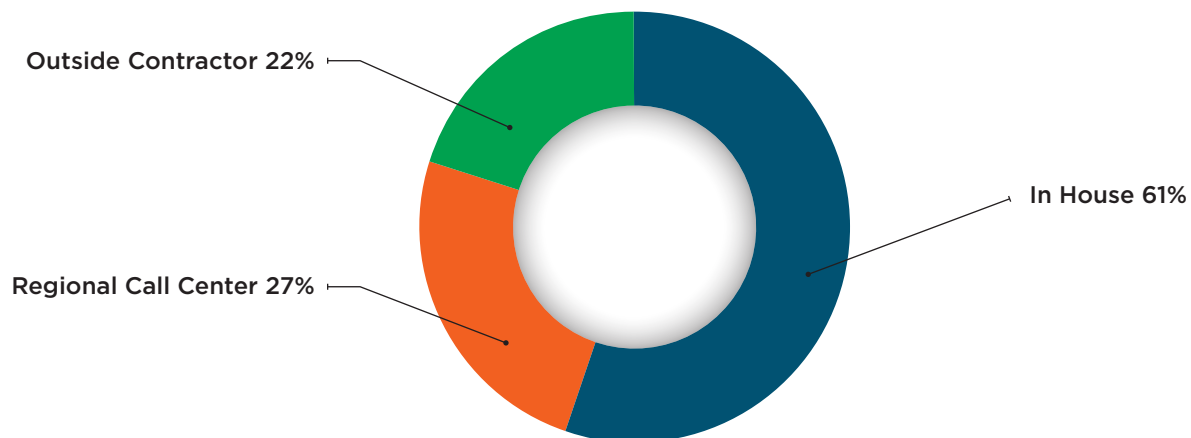
As a part of this shift, some newspapers have added a charge when a new subscription is started or a customer requests an extended stop in service.

### Do You Charge a Setup Fee for New Accounts?

2014		
	Yes	No
<b>Industry</b>	<b>16%</b>	<b>84%</b>
25,000 and under	11	89
25,001-50,000	21	79
50,001-100,000	24	76
100,001-200,000	31	69
200,001+	13	87

## How the calls are handled

### How Customer Service Function is Performed...



The customer call center is increasingly likely to be outsourced to an outside contractor or a corporate regional call center. The trend towards outsourcing is significant compared to five years ago, but there is no significant evidence of the preferred or most cost-effective answer for newspapers, as there has been little change in the most recent couple of years.

#### How Customer Service Function is Performed

	2014 Industry	2008 Industry
In House	61%	68%
Regional Call Center	27	13
Outside Contractor	27	9

## Performance measurements

The traditional benchmark data of percentage of calls abandoned and average length of delay indicate mixed results in terms of customer responsiveness. The percentage of calls abandoned has increased during the last ten years as newspapers have made a cost/benefit decision that a higher threshold is acceptable. This change parallels the outsourcing of customer contact centers.

#### Trend: Percentage of all Calls Abandoned

	2014	2011	2008
<b>Industry</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>
25,000 and under	3	1	2
25,001-50,000	5	3	3
50,001-100,000	5	4	3
100,001-200,000	5	4	3
200,001+	5	5	4

With the exception of newspapers with less than 25,000 circulation, newspapers almost uniformly have accepted a 5 percent abandon rate.

#### Trend: Speed of Answer

	2014	2011	2008
	In seconds		
<b>Industry</b>	<b>12</b>	<b>20</b>	<b>20</b>
25,000 and under	9	10	10
25,001-50,000	22	28	20
50,001-100,000	30	28	25
100,001-200,000	39	34	32
200,001+	32	24	35

The industry average length of delay has also shifted, indicating a marked improvement in the last three years. However, this is in part skewed by the difference in performance between the smallest newspapers and the balance of the survey participants.

Once again, it is important to look at metrics by newspaper size rather than the industry totals, as the average wait time has actually increased for newspapers above 50,000 circulation.

### **Summary:** Making cost-benefit decisions

Looking at traditional metrics such as complaints per thousand deliveries and responsiveness to complaints, the most recent data indicate that newspapers have made a cost-benefit decision that the incremental gains in measurable performance do not warrant the cost. Calls from subscribers today can be much more complex and time consuming, with issues like registration and activation of a digital edition or resolving a payment issue on an expired credit card. It is also true that traditional measurements are just one aspect of providing a positive customer experience.

Newspapers have made strides in modernizing their offerings of customer conveniences. Most transactions can now be conducted online, and most newspapers offer the full suite of options for paying for subscriptions.

Many newspapers provide readers added value through loyalty or membership programs and, of course, online editions provide readers on-demand access to newspaper content and archives. On the whole, the combined effect of these services may have a positive impact on the local newspaper's brand.

# Conclusions: Measurable Progress in Improving Profitability

The newspaper industry is progressing in its search for a sustainable business model in the midst of an increasingly fragmented media environment. Much has been documented about the increase in reader revenues in recent years offsetting the loss in advertising revenues. Essential improvements in operant efficiencies have not been as well documented beyond sweeping statements concerning staff reductions. The industry's resourcefulness in maintaining a level of service sufficient to retain readers while capturing new audiences and improving revenue is the key story inside this year's study.

Most of the expense reductions documented in this report have come through streamlined operations that are transparent to readers. Decisions to eliminate longstanding discounts and partnerships with organizations once perceived as competitors to provide more efficient distribution models required managers to let go of traditional thinking and move to making rational data-driven decisions.

Embracing segmented home delivery pricing models, a monetization of digital content and a willingness to sustain a marginal loss in sales volume has facilitated unprecedented gains in reader revenue. It is the combination of these improvements, along with new efficiencies, that has yielded the remarkable growth in the bottom-line contribution of circulation marketing.

The study also documents the industry's progress in sharing and adopting solutions that work. Tactics such as premium pricing of a Thanksgiving Day edition or discontinuing discounts for recurring payment plans, or more strategic decisions such as the premium pricing of a seven-day home delivery subscription, required creativity and the willingness to pursue a different path. Publishers had to take the initiative to seek out new solutions, find out what is working and adapt it to their market. The value of reports such as NAA's *Circulation Facts, Figures and Logic* is to facilitate that sharing in a well-documented fashion. By consistently trending the data, this ongoing study can point to where the industry is going next.



## Acknowledgements

NAA has conducted the *Facts, Figures & Logic* survey for 18 years. This edition of the study is the final product that is made possible by the assistance of a number of individuals with special knowledge of the newspaper industry. Most importantly, success of the study remains dependent upon the hundreds of circulation executives who make the commitment and find the time to complete the lengthy questionnaire.

**Clark, Martire & Bartolomeo, Inc.** Since 2008, Clark, Martire & Bartolomeo has acted as NAA's research partner on the project. Greg Martire, Managing Partner, remains NAA's point person in executing the study and contributes to analyzing the results. Greg has more than 25 years of experience in the design of opinion and market research. He continues to conduct consumer and business-to-business research for a variety of industries, including newspapers, magazines, information services, telecommunications, healthcare, manufacturing and cultural institutions.

**Mather Economics.** Well-known among NAA members, the global consulting firm contributed data and validated some of the study's findings by sharing aggregated client data. Mather works with more than 300 newspapers to help them better understand customers, develop and implement pricing strategies to maximize operating margins, grow revenue and improve customer loyalty through economic modeling.

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# Just the Facts

The following is a reprint of the 2014 Circulation Survey questionnaire followed by the aggregated results for each circulation size group. The results listed below are medians, except where noted. The medians are used to provide an exact midpoint of the data, where half of the responses to the question were smaller and half of the responses were greater. The number of newspapers that completed and returned a survey in time for data analysis is 166. The “n” provided in the data is the number of newspapers that responded to that particular question.

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## SECTION I: General Circulation Data

1. Data used exclusively for categorizing individual newspaper responses by circulation size.

## SECTION II: Circulation Revenue

2a. Are circulation discounts treated as (Choose One).

An expense

A reduction in revenue

Trend: How Circulation Discounts Treated

Q.2a	N			As an Expense			As a Reduction in Revenue		
	2014	2011	2007	2014	2011	2007	2014	2011	2007
<b>Industry</b>	<b>141</b>	<b>253</b>	<b>483</b>	<b>9%</b>	<b>13%</b>	<b>30%</b>	<b>91%</b>	<b>87%</b>	<b>70%</b>
25,000 and under	77	155	265	7	12	27	93	88	73
25,001-50,000	25	35	96	20	17	27	80	83	73
50,001-100,000	19	27	11	-	13	42	100	89	58
100,001-200,000	14	18	17	14	11	36	86	83	64
200,001+	6	10	20	-	20	26	100	80	74

2b. Please enter your newspaper's total circulation expenses for 2014. (Include transportation costs. Do not include mailroom or alternative delivery/TMC operations).

Before discounts \$ \_\_\_\_\_

After discounts \$ \_\_\_\_\_

Trend: Circulation Expense

Q.2b	N			Median Before Discount			Median After Discount		
	2014	2011	2007	2014	2011	2007	2014	2011	2007
<b>Industry</b>	<b>135</b>	<b>210</b>	<b>202</b>	<b>1,178,710</b>	<b>985,500</b>	<b>1,513,458</b>	<b>1,494,500</b>	<b>1,108,410</b>	<b>1,510,400</b>
25,000 and under	73	124	104	409,478	611,246	518,964	553,703	611,376	475,511
25,001-50,000	22	29	46	3,623,969	2,464,725	2,122,668	3,745,316	2,756,544	2,150,000
50,001-100,000	18	25	28	3,508,500	4,475,551	4,730,915	4,834,000	4,951,826	5,083,995
100,001-200,000	15	18	12	15,736,131	11,966,141	16,943,030	16,089,100	10,208,042	20,453,027
200,001+	7	8	12	27,467,831	34,158,000	48,770,879	33,920,258	40,390,516	52,000,000

**2c. Please enter your newspaper's estimated total circulation revenue for 2014.**

Before discounts \$ \_\_\_\_\_ After discounts \$ \_\_\_\_\_

**Trend: Total Circulation Revenue**

Q.2c	N			Median Before Discount			Median After Discount		
	2014	2011	2007	2014	2011	2007	2014	2011	2007
<b>Industry</b>	<b>134</b>	<b>213</b>	<b>202</b>	<b>\$3,031,064</b>	<b>\$2,237,669</b>	<b>\$2,975,356</b>	<b>\$3,401,028</b>	<b>\$2,605,262</b>	<b>\$2,967,391</b>
25,000 and under	73	127	104	1,028,000	1,221,418	1,006,962	1,164,486	1,173,766	943,263
25,001-50,000	22	28	46	7,000,000	6,855,383	4,802,706	6,910,594	6,951,010	4,664,500
50,001-100,000	17	27	28	12,735,645	11,726,604	10,419,936	14,687,000	11,124,007	9,783,213
100,001-200,000	15	18	12	32,633,990	24,899,164	26,861,412	30,550,000	23,315,573	25,429,803
200,001+	7	8	12	67,387,126	90,967,000	69,694,000	70,882,338	65,273,827	68,544,000

**2d. Please provide the total number of employees on your circulation staff:  
(Audience Development + Distribution)**

Full-time \_\_\_\_\_ (Actual number of employees)

Part-time \_\_\_\_\_ (Actual number of employees)

Total number of hours worked (all employees): \_\_\_\_\_ per week

**Trend: Median Total Number of Employees on Circulation Staff  
Audience Development and Distribution**

Q.2d	Full-Time						Part-Time					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>9</b>	<b>146</b>	<b>8</b>	<b>268</b>	<b>10</b>	<b>394</b>	<b>5</b>	<b>146</b>	<b>3</b>	<b>249</b>	<b>4</b>	<b>364</b>
25,000 and under	5	83	5	157	4	202	2	83	2	144	2	180
25,001-50,000	17	25	15	42	16	78	12	25	6	39	6	76
50,001-100,000	27	17	30	29	31	47	10	17	7	28	15	44
100,001+	41	21	44	29	66	60	29	21	24	28	35	58

**Trend: Total Number of Hours Worked Per Week (All Employees)**

Q.2d	2014	N	2011	N	2008	N
<b>Industry</b>	<b>440</b>	<b>145</b>	<b>361</b>	<b>262</b>	<b>480</b>	<b>371</b>
25,000 and under	295	83	234	152	200	191
25,001-50,000	970	24	712	41	860	77
50,001-100,000	1,266	17	1,400	29	1,574	43
100,001-200,000	1,275	15	2,240	21	2,825	30
200,001+	4,118	6	3,469	8	4,120	23

# SECTION III: Home Delivery Distribution Management

## CHANGES IN PUBLISHING FREQUENCY

### 3. Have you stopped printing any days of the week in the past 24 months?

Stopped Printing a Newspaper any Days of the Week				
Q.3	2014 in past 24 months		2011 in past 12 months	
	%	N	%	N
Yes	7	10	7	19
No	93	144	93	260

### 4. IF YES - Which days of the week have you stopped printing-home delivery and/or single copy?

- a. Home delivery
- b. Single copy

Total: Home Delivery and/or Single Copy (Net)					
Q.4a,b	2014		2011*		N
	%	N	%	N	
Monday	5	8	3	8	
Tuesday	1	2	1	3	
Wednesday	1	1	1	4	
Thursday	1	2	0	1	
Friday	-	-	1	4	
Saturday	1	2	2	6	
Sunday	-	-	2	5	

\* was asked as a single question in 2011; home delivery and single copy asked separately in 2014. Asked as stopped in past 24 months in 2014.

Q.4a,b	Stopped Home delivery		Q.4b	Stopped Single Copy	
	%	N		%	N
Monday	5	8	Monday	5	8
Tuesday	1	2	Tuesday	1	2
Wednesday	1	1	Wednesday	1	1
Thursday	1	2	Thursday	1	2
Friday	-	-	Friday	-	-
Saturday	1	2	Saturday	1	1
Sunday	-	-	Sunday	1	-

## HOME-DELIVERY OPERATIONS

**5a. Have you made a substantial change in the distribution of your newspaper that resulted in outsourcing the district manager functions to an independent distributor that in turn contracts with carriers? Which response best reflects the change at your newspaper?**

Q.5a	2014	N	2011	N
Yes, but only in select geographic areas	5%	7	5%	13
Yes, changed the distribution structure that eliminates district manager positions and the newspaper now contracts with fewer independent contractors that subcontract with carriers	11	16	9	26
No, we have retained the structure of the distribution function regardless of whether we have eliminated some positions	84	128	86	236

### Made Substantial Changes in Distribution Recently?

Q.5a	Yes, but only in select geographic areas	Yes, changed the distribution structure now contracts with fewer independent contractors that subcontract with carriers	No, we have retained the structure of the distribution function regardless of whether we have eliminated some positions
<b>Industry</b>	<b>5%</b>	<b>11%</b>	<b>84%</b>
25,000 and under	1	7	92
25,001-50,000	-	8	92
50,001-100,000	10	10	80
100,001-200,000	7	33	60
200,001+	50	17	33

**5b. Do you outsource home delivery, if so what percent? (Other than carriers contracted directly to the newspaper)**

### Trend: Mean Percentage that Outsource any Home Delivery

Q.5b	2014		2011		2008	
	N	%	N	%	N	%
<b>Industry</b>	<b>150</b>	<b>27</b>	<b>254</b>	<b>22</b>	<b>401</b>	<b>15</b>
25,000 and under	85	12	143	11	204	7
25,001-50,000	25	28	40	28	79	4
50,001-100,000	18	50	29	38	49	27
100,001+	22	68	30	60	63	48

**Trend: Median Percentage of Home Delivery Outsourced**

Q.5b	2014		2011		2008	
	N	%	N	%	N	%
<b>Industry</b>	<b>150</b>	<b>2</b>	<b>254</b>	<b>0</b>	<b>401</b>	<b>1</b>
25,000 and under	85	-	143	0	204	1
25,001-50,000	25	1	40	1	79	1
50,001-100,000	18	5	29	3	49	1
100,001-200,000	22	10	21	5	34	1
200,001+	15	7	9	20	28	22

**5c. Who do you use for outsourcing home delivery?**

- National Distribution Company
- Another Daily Newspaper
- Other

**Trend: Who Use For Outsourcing Home Delivery**

Q.5c	N			National Distribution Company			Another Daily Newspaper			Other		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>39</b>	<b>48</b>	<b>61</b>	<b>13%</b>	<b>21%</b>	<b>18%</b>	<b>51%</b>	<b>56%</b>	<b>56%</b>	<b>36%</b>	<b>23%</b>	<b>26%</b>
25,000 and under	9	13	14	11	38	29	11	23	29	78	39	43
25,001-50,000	6	6	3	33	33	67	67	50	33	-	17	0
50,001-100,000	9	10	13	22	10	23	56	60	54	22	30	23
100,001-200,000	10	13	9	-	15	11	60	85	67	40	0	22
200,001+	5	5	21	-	0	5	80	60	76	20	40	19

**6. What is your average number of home delivery subscribers per route?**

By Type of Carrier	Daily	Saturday	Sunday
a. per youth route	_____	_____	_____
b. per adult route	_____	_____	_____

**Trend: Median Number of Daily Home Delivery Subscribers Per Route by Type of Carrier Monday-Friday Delivery**

Q.6	Q.6a - Youth Route						Q.6b - Adult Route					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>39</b>	<b>134</b>	<b>44</b>	<b>243</b>	<b>45</b>	<b>251</b>	<b>150</b>	<b>134</b>	<b>179</b>	<b>241</b>	<b>200</b>	<b>370</b>
25,000 and under	40	74	44	132	45	141	136	74	167	131	218	190
25,001-50,000	139	24	40	41	40	49	154	24	146	41	158	75
50,001-100,000	34	16	39	30	77	31	208	16	201	30	203	49
100,001-200,000	-	14	0*	21	43	18	158	14	200	21	200	30
200,001+	-	6	3	9	0	0	196	6	240	8	205	26

**Trend: Median Number of Daily Home Delivery Subscribers Per Route by Type of Carrier  
Saturday Delivery**

Q.6	Q.6a - Youth Route						Q.6b - Adult Route					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>38</b>	<b>119</b>	<b>43</b>	<b>203</b>	<b>45</b>	<b>223</b>	<b>165</b>	<b>119</b>	<b>183</b>	<b>202</b>	<b>200</b>	<b>314</b>
25,000 and under	40	62	41	100	40	117	139	62	156	99	219	140
25,001-50,000	139	24	50	39	45	47	168	24	150	39	165	73
50,001-100,000	35	16	26	29	87	29	220	16	218	29	218	47
100,001-200,000	-	12	0*	21	48	18	12	12	210	21	226	29
200,001+	-	5	0*	8	0	12	5	5	244	8	211	25

\* % of newspapers with 100,000+ circulation that have youth carriers: Mon-Fri 3%, Saturday 0%, Sunday 0%

**Trend: Median Number of Daily Home Delivery Subscribers per Route by Type of Carrier  
Sunday Delivery**

Q.6	Q.6a - Youth Route						Q.6b - Adult Route					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>40</b>	<b>121</b>	<b>50</b>	<b>217</b>	<b>50</b>	<b>222</b>	<b>200</b>	<b>121</b>	<b>206</b>	<b>216</b>	<b>225</b>	<b>331</b>
25,000 and under	45	62	50	113	46	117	154	62	193	112	250	155
25,001-50,000	32	23	49	40	47	47	204	23	189	40	176	73
50,001-100,000	-	16	20	29	88	29	250	16	260	29	247	48
100,001-200,000	-	14	0*	21	60	17	232	14	270	21	266	29
200,001+	-	6	0	8	0	12	267	6	323	8	254	26

\* % of newspapers with 100,000+ circulation that have youth carriers: Mon-Fri 3%, Saturday 0%, Sunday 0%

**7. What percentage of newspapers in the NDM are delivered to the:**

	Daily	Saturday	Sunday
a. Porch	_____	_____	_____
b. Tube	_____	_____	_____
c. Driveway	_____	_____	_____
	100%	100%	100%

**Trend: Mean Percentage of Daily Newspapers in NDM Delivered to Porch, Tube or Driveway**

Q.7	N	N	N	Porch			Tube			Driveway		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>137</b>	<b>233</b>	<b>373</b>	<b>30%</b>	<b>33%</b>	<b>31%</b>	<b>31%</b>	<b>29%</b>	<b>32%</b>	<b>39%</b>	<b>38%</b>	<b>38%</b>
25,000 and under	77	129	189	29	36	28	41	37	40	29	27	32
25,001-50,000	24	39	75	47	37	37	25	25	32	28	38	31
50,001-100,000	16	28	46	21	28	32	18	20	18	61	52	51
100,001-200,000	15	19	34	19	21	36	11	12	17	70	67	47
200,001+	5	8	25	23	22	25	8	5	11	69	73	64



**Trend: Percentage of Saturday Newspapers in NDM Delivered to Porch, Tube or Driveway**

Q.7	N			Porch			Tube			Driveway		
	2014	2011	2008	2011	2011	2008	2011	2011	2008	2011	2011	2008
<b>Industry</b>	<b>129</b>	<b>208</b>	<b>294</b>	<b>32%</b>	<b>35%</b>	<b>32%</b>	<b>30%</b>	<b>28%</b>	<b>29%</b>	<b>38%</b>	<b>37%</b>	<b>39%</b>
25,000 and under	70	105	115	32	39	30	40	36	39	28	25	32
25,001-50,000	24	40	74	47	38	37	25	26	32	28	36	31
50,001-100,000	16	28	44	21	28	31	18	20	17	61	52	52
100,001-200,000	14	19	34	19	21	36	12	12	17	70	67	47
200,001+	5	8	25	24	22	25	8	5	11	68	73	64

**Trend: Percentage of Sunday Newspapers in NDM Delivered to Porch, Tube or Driveway**

Q.7	N			Porch			Tube			Driveway		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>130</b>	<b>219</b>	<b>322</b>	<b>29%</b>	<b>30%</b>	<b>29%</b>	<b>30%</b>	<b>30%</b>	<b>30%</b>	<b>41%</b>	<b>40%</b>	<b>41%</b>
25,000 and under	70	118	144	27	31	24	41	38	39	31	31	36
25,001-50,000	24	39	73	49	37	37	23	26	31	28	37	32
50,001-100,000	16	27	44	21	28	31	18	21	16	62	51	52
100,001-200,000	15	19	33	19	22	34	7	12	17	74	66	49
200,001+	5	8	25	23	22	25	8	5	11	68	73	64

**8. Please provide the number of:**

	<b>Employees</b>	<b>Independent Contractors (buy/sell relationship)</b>	<b>Independent Contractors (fee-based/agents)</b>
Home Delivery YOUTH carriers	_____	_____	_____
Home Delivery ADULT carriers	_____	_____	_____

**Trend: Median Number of Employees**

Q.8a,b	Youth						Adult					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>4</b>	<b>3</b>	<b>17</b>	<b>1</b>	<b>18</b>	<b>3</b>	<b>28</b>	<b>8</b>	<b>13</b>	<b>9</b>	<b>35</b>	<b>15</b>

**Trend: Median Number of Independent Contractors Buy/Sell**

Q.8a,b	Youth						Adult					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>20</b>	<b>15</b>	<b>22</b>	<b>59</b>	<b>35</b>	<b>111</b>	<b>83</b>	<b>54</b>	<b>81</b>	<b>169</b>	<b>81</b>	<b>267</b>

**Trend: Median Number of Independent Contractors  
Fee Based/Agents**

Q.8a,b	Youth						Adult					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
Industry	15	17	21	8	20	19	100	90	68	127	57	160

**9a. Please provide the total number of employees on your circulation staff related to distribution:**

Full-time \_\_\_\_\_ (Actual number of employees)

Part-time \_\_\_\_\_ (Actual number of employees)

Total number of hours worked (all employees): \_\_\_\_\_ per week

**Total Number of Employees/Hours Worked Related Only to Distribution**

**Median # employees/hours worked**

Q.9a	Full-time Employees	Part-time Employees	Hours Worked
Industry	5	3	267
25,000 and under	3	1	160
25,001-50,000	9	8	509
50,001-100,000	17	6	813
100,001-200,000	19	7	1,080
200,001+	28	21	1,170

**9b. Please provide the total number of home delivery newspapers per district manager/per agent for your own publications and for all titles you home deliver:**

\_\_\_\_\_   
 Your Own Publications

\_\_\_\_\_   
 Total all Titles Combined

**Trend: Total Number of Home Delivery Papers Per District Manager**

**Own Publications**

Q.9b	2014	N	2011	N	2008	N
Industry	4,208	134	4,355	236	4,500	332
25,000 and under	3,704	74	4,000	132	4,111	166
25,001-50,000	4,133	24	4,489	41	4,500	73
50,001-100,000	5,000	17	5,044	27	4,729	41
100,001-200,000	11,600	13	7,056	20	4,600	29
200,001+	12,950	6	14,147	8	7,193	21

**Trend: Total Number of Home Delivery Papers Per District Manager**

Total All Titles Combined						
Q.9b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>5,000</b>	<b>136</b>	<b>5,100</b>	<b>216</b>	<b>4,826</b>	<b>294</b>
25,000 and under	3,943	76	4,338	118	4,600	147
25,001-50,000	5,394	24	5,500	35	4,800	66
50,001-100,000	6,000	17	6,000	27	4,863	36
100,001-200,000	12,001	13	8,758	20	4,700	23
200,001+	15,679	6	16,044	8	7,498	20

**9c. Please provide the total number of home delivery carriers per district manager/per agent:**

**9d. Please provide the total number of home delivery routes per district manager/per agent:**

**Trend: Total Number of Home Delivery Carriers and Routes Per District Manager**

Q.9c,d	Carriers						Routes					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>23</b>	<b>138</b>	<b>25</b>	<b>249</b>	<b>25</b>	<b>372</b>	<b>35</b>	<b>138</b>	<b>38</b>	<b>248</b>	<b>34</b>	<b>373</b>
25,000 and under	21	80	25	142	24	190	32	80	38	141	36	190
25,001-50,000	26	23	26	42	28	76	35	23	35	42	38	77
50,001-100,000	25	17	29	28	25	45	32	17	44	29	30	44
100,001-200,000	32	12	21	21	21	33	50	12	28	20	29	33
200,001+	35	6	37	7	25	24	49	6	47	7	34	24

**9e. Excluding transportation to the distribution center or individual carrier, how many employees are dedicated to home delivery distribution?**

Full-time \_\_\_\_\_ (Actual number of employees)

Part-time \_\_\_\_\_ (Actual number of employees)

Total number of hours worked (all employees): \_\_\_\_\_ per week

Total number of FTEs \_\_\_\_\_

**Trend: Number of Employees Dedicated to Home Delivery Distribution**

Q.9e	Full Time						Part Time					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>4</b>	<b>138</b>	<b>4</b>	<b>252</b>	<b>5</b>	<b>358</b>	<b>1</b>	<b>130</b>	<b>1</b>	<b>230</b>	<b>2</b>	<b>302</b>
25,000 and under	2	77	2	143	2	174	0	72	1	128	1	144
25,001-50,000	7	24	8	42	7	76	4	24	2	39	2	67
50,001-100,000	14	16	13	28	15	47	4	15	4	26	6	39
100,001-200,000	13	21	27	21	31	33	4	19	5	21	10	27
200,001+	21	14	37	8	43	24	7	13	5	8	19	21

**Number of Hours Worked Per Week (All Employees) and Total Number of FTEs**

Q.9e	Total Hours Worked						FTEs					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>240</b>	<b>117</b>	<b>240</b>	<b>222</b>	<b>280</b>	<b>325</b>	<b>4</b>	<b>137</b>	<b>5</b>	<b>233</b>	<b>7</b>	<b>317</b>
25,000 and under	140	62	144	117	135	149	2	77	3	131	3	146
25,001-50,000	380	23	400	41	360	74	11	24	10	39	9	72
50,001-100,000	780	13	620	26	720	45	17	16	16	27	16	42
100,001-200,000	1,060	13	1,392	21	1,479	32	27	14	35	21	36	30
200,001+	1,457	6	1,726	8	2,040	22	29	6	39	7	49	22

**9f. Do you use GPS technology to track and audit routes?**

**Do You Use GPS Technology to Track and Audit Routes?**

Q.9f	N	Yes	No
<b>Industry</b>	<b>148</b>	<b>19%</b>	<b>81%</b>
25,000 and under	83	16	84
25,001-50,000	25	24	76
50,001-100,000	18	22	78
100,001-200,000	15	27	73
200,001+	7	14	86

**10. What is your carrier compensation on a per-copy basis (difference between wholesale and retail for buy sell contractors or piece rate/payment per copy for fee for service agents)?**

**Median Carrier Compensation on a Per-Copy Basis\***

Q.10	Daily Home Delivery		Sunday Home Delivery		Daily Single Copy		Sunday Single Copy	
	N	\$	N	\$	N	\$	N	\$
<b>Industry</b>	<b>105</b>	<b>.15</b>	<b>97</b>	<b>.22</b>	<b>84</b>	<b>.20</b>	<b>76</b>	<b>.34</b>
25,000 and under	54	.15	47	.19	42	.20	35	.40
25,001-50,000	21	.15	21	.24	17	.10	16	.25
50,001-100,000	13	.15	13	.22	10	.20	10	.35
100,001-200,000	17	.16	11	.31	11	.22	11	.31
200,001+	11	.16	5	.25	4	.21	4	.51

\*Difference between wholesale and retail for buy sell contractors or piece rate/payment per copy for fee for service agents.

**Carrier Compensation Per Copy for Buy/Sell Carriers (wholesale-retail)\***

Q.10	Daily Home Delivery		Sunday Home Delivery		Daily Single Copy		Sunday Single Copy	
	N	\$	N	\$	N	\$	N	\$
<b>Industry</b>	<b>39</b>	<b>.16</b>	<b>39</b>	<b>.22</b>	<b>52</b>	<b>.26</b>	<b>48</b>	<b>.44</b>
25,000 and under	27	.16	26	.18	27	.20	24	.39
25,001-50,000	6	.14	8	.37	9	.26	8	.30
50,001-100,000	3	.28	3	.43	8	.28	8	.76
100,001-200,000	2	.27	2	.42	4	.42	4	.78
200,001+	1	.14	-	.42	4	.29	4	.69

\*Difference between wholesale and retail for buy sell contractors or piece rate/payment per copy for fee for service agents.

**Piece Rate for Contracted Fee for Service Agents\***

Q.10	Daily Home Delivery		Sunday Home Delivery		Daily Single Copy		Sunday Single Copy	
	N	\$	N	\$	N	\$	N	\$
<b>Industry</b>	<b>64</b>	<b>.18</b>	<b>59</b>	<b>.25</b>	<b>46</b>	<b>.21</b>	<b>44</b>	<b>.34</b>
25,000 and under	31	.18	27	.19	22	.19	19	.35
25,001-50,000	11	.18	11	.33	8	.24	9	.35
50,001-100,000	7	.16	7	.22	4	.15	4	.25
100,001-200,000	10	.22	10	.30	12	.23	10	.35
200,001+	5	.20	4	.37	10	.18	2	.19

\*Difference between wholesale and retail for buy sell contractors or piece rate/payment per copy for fee for service agents.

**10a. What is your carrier compensation on a per-copy basis for buy/sell contracted carriers (difference between wholesale and retail)?**

**10b. What is your piece rate for contracted fee for service agents?**

**11. How much will you spend in 2014 on carrier route subsidies/allowances?**

(This is in addition to piece rate or carrier profit compensation.) \$ \_\_\_\_\_

Industry-wide, carrier route subsidies/allowances have decreased quite substantially since 2011.

**Trend: Median Amount Will Spend on Carrier Route Subsidies/Allowances**

Q.11	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$76,703</b>	<b>65</b>	<b>\$145,000</b>	<b>157</b>	<b>\$120,000</b>	<b>269</b>

## 12. What is the turnover percentage for each category for the last 12 months?

(To compute carrier turnover, divide the number of carriers replaced annually by the number of routes.)

Home Delivery Carrier turnover \_\_\_\_\_ % District Manager turnover \_\_\_\_\_ %

**Turnover Percentage Past 12 Months**

Q.12	Home-Delivery Carrier						District Manager					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>32%</b>	<b>127</b>	<b>36%</b>	<b>244</b>	<b>40%</b>	<b>375</b>	<b>1%</b>	<b>130</b>	<b>0%*</b>	<b>230</b>	<b>12%</b>	<b>301</b>
25,000 and under	20	75	26	142	30	195	-	75	0	133	12	150
25,001-50,000	48	21	60	43	42	77	16	21	10	38	25	65
50,001-100,000	45	15	42	28	61	42	15	16	7	27	9	36
100,001-200,000	43	10	51	19	69	33	10	12	9	19	10	28
200,001+	46	6	26	5	55	23	10	6	8	6	5	17

\*Industry-wide 48% of newspapers had turnover of District Managers in 2011; 51% had turnover in 2014.

## 13. Through an agreement with your company, do your newspaper carriers deliver other daily newspapers along with your newspaper?

**Trend: Deliver Other Different Publications**

Q.13	Yes, Deliver Other Publications						Median # of Different Publications Delivered Daily					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>43%</b>	<b>175</b>	<b>45%</b>	<b>303</b>	<b>40%</b>	<b>405</b>	<b>4</b>	<b>72</b>	<b>4</b>	<b>131</b>	<b>3</b>	<b>150</b>
25,000 and under	27	102	28	177	20	206	2	25	2	45	2	37
25,001-50,000	48	27	62	45	35	79	4	12	3	26	2	26
50,001-100,000	68	22	76	33	70	50	3	14	5	25	3	30
100,001-200,000	93	15	95	21	89	35	10	14	7	20	4	31
200,001+	78	9	90	10	89	28	7	7	6	9	7	24

## 14a. If yes, how many different publications?

**Trend: Deliver Other Different Publications**

Q.14a	Median # of Different Publications Delivered Saturday						Median # of Different Publications Delivered Sunday					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>4</b>	<b>67</b>	<b>3</b>	<b>121</b>	<b>2</b>	<b>130</b>	<b>3</b>	<b>63</b>	<b>2</b>	<b>111</b>	<b>2</b>	<b>113</b>
25,000 and under	3	22	2	40	2	29	2	21	2	39	2	27
25,001-50,000	4	12	2	23	2	24	2	12	2	19	2	20
50,001-100,000	3	14	4	25	2	25	3	10	3	22	1	25
100,001-200,000	8	12	6	19	3	27	3	13	2	19	2	19
200,001+	8	7	4	9	5	23	6	7	3	9	2	21

## 14b. Average number of newspapers delivered per day in addition to your own:

Trend: Median Number of Newspapers Delivered Per Day In Addition To Your Own

Daily						
Q.14b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>3,800</b>	<b>69</b>	<b>3,000</b>	<b>129</b>	<b>3,500</b>	<b>145</b>
25,000 and under	733	24	988	46	1,411	36
25,001-50,000	3,739	13	1,138	26	1,500	27
50,001-100,000	8,000	13	6,707	23	2,484	28
100,001-200,000	12,576	12	18,000	19	5,734	30
200,001+	41,300	7	42,000	9	20,613	22

Trend: Median Number of Newspapers Delivered Per Day In Addition To Your Own

Q.14b	Saturday						Sunday					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>3,700</b>	<b>63</b>	<b>2,500</b>	<b>119</b>	<b>3,625</b>	<b>128</b>	<b>4,044</b>	<b>61</b>	<b>2,139</b>	<b>109</b>	<b>2,696</b>	<b>113</b>
25,000 and under	716	21	944	42	1,400	29	2,250	19	1,593	42	1,800	27
25,001-50,000	2,500	13	1,149	22	957	25	2,500	13	625	20	1,000	21
50,001-100,000	10,755	12	4,722	23	2,750	24	11,000	11	1,923	18	1,750	26
100,001-200,000	10,750	11	16,108	18	5,378	27	6,653	11	18,692	18	5,648	18
200,001+	62,700	6	34,000	9	16,000	21	25,500	7	69,582	8	8,250	20

## 14c. What other products, other than newspapers, do you deliver (phone books, magazines, product sampling, other) that are exclusive of the newspaper poly bag? (Please select all that apply.)

Trend: Other Products Delivered

Q.14c	Phone Books			Product Samples			Catalogs					
	2014	2011	2008	2014	2011	2008	2014	2011	2008			
	<b>N</b>	<b>N</b>	<b>N</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>			
<b>Industry</b>	<b>45</b>	<b>77</b>	<b>405</b>	<b>9</b>	<b>7</b>	<b>4</b>	<b>44</b>	<b>56</b>	<b>33</b>	<b>11</b>	<b>7</b>	<b>6</b>
25,000 and under	12	25	206	-	0	3	8	28	16	-	0	2
25,001-50,000	7	10	79	14	0	1	43	70	38	14	10	6
50,001-100,000	11	17	50	9	12	2	36	59	48	-	0	8
100,001-200,000	10	16	35	-	13	3	70	81	69	20	13	14
200,001+	5	6	28	40	0	11	100	50	71	40	33	21

**Trend: Other Products Delivered**

Q.14c	Magazines						Other		
	2014	2011	2008	2014	2011	2008	2014	2011	2008
	N	N	N	%	%	%	%	%	%
<b>Industry</b>	<b>45</b>	<b>77</b>	<b>405</b>	<b>44*</b>	<b>30</b>	<b>14</b>	<b>47**</b>	<b>36</b>	<b>23</b>
25,000 and under	12	25	206	25	12	11	83	64	25
25,001-50,000	7	10	79	43	20	6	29	20	25
50,001-100,000	11	17	50	27	47	24	64	24	16
100,001-200,000	10	16	35	70	31	29	20	25	26
200,001+	5	6	28	80	50	25	-	33	11

\* 29% national magazines/31% local magazines.

\*\* 47% other print products/7% other non-print products.

## SECTION IV: Marketing

**15. Please estimate your newspaper’s 2014 print and digital circulation marketing expenses in the following categories. (To estimate 2014 totals, please use year-to-date actual expenses and estimate remaining months. Do not include expenses for “Sunday Select” type products, or sales of niche products.)**

a. Direct Sales Expense: \$ \_\_\_\_\_

- (Fully allocate all direct sales expenses, but do not include premium or discount expenses).
- Include:
  1. All costs associated with carrier promotion, telemarketing, sales crews, kiosks, etc.
  2. Wages/commissions earned by employee telemarketing or sales crew personnel.
  3. Wages/commissions for all supervisors dedicated to direct sales efforts, including telemarketing managers, sales crew managers, or outside sales managers.
- Do not include: salary of circulation promotion or marketing manager/director.

b. Other Promotional Expense: \$ \_\_\_\_\_

- Include reader contests, radio, television, outdoor advertising, or any other “awareness” promotion.
- Do not include house-advertisement or newsprint expenses.

c. Subscriber Discount Expense: \$ \_\_\_\_\_

- Include all discount expense for new subscribers. If subscriber discounts are treated as revenue reductions at your newspaper please enter total estimated reductions.

d. Subscriber Premium Expense: \$ \_\_\_\_\_

- Include the costs of purchasing and distributing any promotion premiums used to acquire new subscribers or retain current ones.

e. Limited Overhead Expense: \$ \_\_\_\_\_

- Include rent (for remote facilities dedicated to subscription sales activities), technology, phone lines, billing, etc.



**Trend: Median Marketing Expenses**

Q.15a,b	Direct Sales Expenses						Promotional Expense					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$153,683</b>	<b>120</b>	<b>\$90,987</b>	<b>219</b>	<b>\$98,000</b>	<b>348</b>	<b>10,000</b>	<b>66</b>	<b>\$8,838</b>	<b>121</b>	<b>\$10,000</b>	<b>189</b>
25,000 and under	36,000	65	35,000	129	28,000	169	2,485	36	3,718	68	5,000	86
25,001-50,000	220,000	19	293,000	33	166,000	72	11,382	10	11,965	20	15,000	35
50,001-100,000	500,000	17	963,556	24	616,000	46	40,726	11	53,000	13	20,000	24
100,001+	1,901,481	19	2,749,076	25	1,844,000	56	55,000	9	150,000	18	200,000	41

**Trend: Median Marketing Expenses**

Q.15c,d	Subscriber Discount						Subscriber Premiums					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$95,015</b>	<b>82</b>	<b>\$173,752</b>	<b>188</b>	<b>\$166,000</b>	<b>298</b>	<b>17,500</b>	<b>72</b>	<b>\$10,000</b>	<b>114</b>	<b>\$15,000</b>	<b>235</b>
25,000 and under	49,861	47	60,385	109	32,000	144	3,500	36	2,603	58	3,000	96
25,001-50,000	175,000	15	469,000	32	192,000	62	22,770	13	22,950	17	15,000	51
50,001-100,000	845,775	9	1,240,087	19	566,000	38	37,000	12	23,270	14	40,000	39
100,001-200,000	1,660,000	9	2,540,067	16	2,176,000	29	125,676	6	83,056	14	90,000	26
200,001+	3,977,880	2	1,825,281	6	4,522,000	23	649,800	5	219,931	7	\$219,000	22

**Trend: Median Marketing Expenses**

Q.15e	Limited Overhead Expenses					
	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$12,796</b>	<b>26</b>	<b>\$7,200</b>	<b>39</b>	<b>\$11,000</b>	<b>63</b>

**16. Of all of your paid starts during the past 12 months, what percentages were:**

Adds To 100%

**Percentage of Paid Starts That Are:**

Q.16*	N	Print Exclusively		Digital Exclusively		Print + Digital	
		N	%	N	%	N	%
<b>Industry</b>	<b>126</b>	<b>37</b>	<b>5</b>	<b>58</b>			
25,000 and under	72	48	4	48			
25,001-50,000	19	18	6	76			
50,001-100,000	16	30	9	61			
100,001-200,000	13	22	5	73			
200,001+	6	15	14	71			

\* no trends, response categories changed.

**17. Please estimate total new paid orders for 2014.**

To estimate 2014 totals, please use year-to-date, actual figures and estimate remaining months based on 2014 figures or budgeted marketing plans. These questions are limited to orders with at least some print component.

**Daily + Sunday Package**

- a. \_\_\_\_\_ Pressure starts (resulting from direct sales efforts)
- b. \_\_\_\_\_ Voluntary starts (do not include vacation restarts)

**Daily Only**

- a. \_\_\_\_\_ Pressure starts
- b. \_\_\_\_\_ Voluntary starts

**Weekend Package (Saturday & Sunday)**

- a. \_\_\_\_\_ Pressure starts
- b. \_\_\_\_\_ Voluntary starts

**Sunday Only**

- a. \_\_\_\_\_ Pressure starts
- b. \_\_\_\_\_ Voluntary starts

**Other (2 or more Daily/1 Sunday)**

- a. \_\_\_\_\_ Pressure starts
- b. \_\_\_\_\_ Voluntary starts

**Digital Only**

- a. \_\_\_\_\_ Pressure starts
- b. \_\_\_\_\_ Voluntary starts

**Trend: New Orders for Daily and Sunday Package**

Q.17	Pressure Starts						Voluntary Starts					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>3,340</b>	<b>106</b>	<b>3,492</b>	<b>202</b>	<b>3,878</b>	<b>330</b>	<b>1643</b>	<b>105</b>	<b>1,172</b>	<b>202</b>	<b>1,720</b>	<b>322</b>
25,000 and under	1,560	52	1,700	113	1,800	153	1,000	51	720	113	884	149
25,001-50,000	5,140	19	6,905	31	5,584	68	2,400	19	1,650	31	1,832	67
50,001-100,000	8,150	16	10,855	26	13,525	46	3,415	16	3,496	26	3,001	45
100,001+	13,376	19	26,567	26	32,490	59	5,523	19	7,866	26	8,134	58

**Trend: New Orders for Daily Only Package**

Q.17	Pressure Starts						Voluntary Starts					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>187</b>	<b>50</b>	<b>187</b>	<b>99</b>	<b>468</b>	<b>164</b>	<b>113</b>	<b>61</b>	<b>152</b>	<b>114</b>	<b>273</b>	<b>174</b>
25,000 and under	487	19	268	48	895	71	55	28	151	57	431	79
25,001-50,000	135	9	74	24	108	31	116	12	156	24	90	34
50,001-100,000	227	11	348	12	375	27	423	10	152	15	167	25
100,001+	89	11	247	13	650	34	192	11	229	16	424	35

\* No trend- response categories changed substantially since 2011. New orders for weekend packages, which had increased at larger newspapers, have dropped off.

**Trend: New Orders for Weekend Package**

Q.17	Pressure Starts						Voluntary Starts					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>512</b>	<b>51</b>	<b>626</b>	<b>87</b>	<b>826</b>	<b>142</b>	<b>210</b>	<b>53</b>	<b>168</b>	<b>90</b>	<b>349</b>	<b>138</b>
25,000 and under	175	20	346	38	177	41	85	22	102	40	98	41
25,001-50,000	1,188	10	700	15	448	33	411	10	200	15	218	32
50,001-100,000	1,693	11	500	17	3,186	29	811	10	269	17	638	27
100,001+	1,015	10	8,523	14	7,183	38	350	11	1,422	14	1,000	37

**Trend: New Orders for Sunday Only Package**

Q.17	Pressure Starts						Voluntary Starts					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>2,062</b>	<b>70</b>	<b>1,213</b>	<b>120</b>	<b>1,686</b>	<b>155</b>	<b>400</b>	<b>70</b>	<b>300</b>	<b>119</b>	<b>466</b>	<b>163</b>
25,000 and under	416	24	540	52	125	41	170	24	188	52	100	48
25,001-50,000	1,815	14	803	21	933	33	346	14	378	22	257	35
50,001-100,000	3,706	14	3,784	21	3,120	33	1,003	11	800	19	608	33
100,001+	10,925	18	33,149	23	9,998	47	3,093	18	4,016	23	2,014	46

**Trend: New Orders for Other Packages**

Q.17	Pressure Starts						Voluntary Starts					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>1,508</b>	<b>36</b>	<b>2,857</b>	<b>74</b>	<b>2,493</b>	<b>86</b>	<b>518</b>	<b>34</b>	<b>584</b>	<b>77</b>	<b>559</b>	<b>86</b>
25,000 and under	322	8	500	21	327	14	310	7	92	24	55	15
25,001-50,000	788	6	1,633	15	947	18	374	6	290	16	270	18
50,001-100,000	1,508	6	4,116	17	2,493	14	233	5	811	16	664	15
100,001+	3,105	16	13,211	20	9,096	39	1,000	16	2,743	20	1,032	37

The number of digital-only starts is limited except at the largest newspapers.

**Paid Orders: Digital-only Pressure Starts Versus Voluntary Starts**

Q.17	Pressure Starts			Voluntary Starts		
		N		N		N
<b>Industry</b>	<b>225</b>	<b>50</b>	<b>275</b>	<b>72</b>		
25,000 and under	48	18	112	34		
25,001-50,000	150	11	290	15		
50,001-100,000	510	8	641	10		
100,001+	2,613	13	1,076	13		

**18. Please estimate the number of permanent stops during the last 12 months for the following subscription packages.**

A permanent stop is NOT: A vacation stop

A move with a restart within a newspaper's delivery area

A stop due to a bad order

A stop in which a customer restarts within a few days without any pressure

A stop resulting from a subscription upgrade

Daily and Sunday \_\_\_\_\_ Sunday only \_\_\_\_\_

Daily only \_\_\_\_\_ Digital-only (excludes apps) \_\_\_\_\_

Weekend (Saturday & Sunday) \_\_\_\_\_ Other (2 or more Daily/Sunday) \_\_\_\_\_

**Trend: Permanent Stops in Past 12 Months**

Daily and Sunday Package						
Q.18	2014	N	2011	N	2008	N
<b>Industry</b>	<b>6,300</b>	<b>102</b>	<b>5,859</b>	<b>196</b>	<b>7,000</b>	<b>323</b>
25,000 and under	2,660	51	3,103	109	2,965	146
25,001-50,000	8,435	17	9,057	30	8,347	70
50,001-100,000	12,677	16	17,889	26	17,950	46
100,001-200,000	28,800	11	31,806	17	35,095	32
200,001+	49,760	7	61,000	9	69,611	25

**Trend: Permanent Stops in Past 12 Months**

Daily Only						
Q.18	2014	N	2011	N	2008	N
<b>Industry</b>	<b>215</b>	<b>61</b>	<b>268</b>	<b>104</b>	<b>490</b>	<b>174</b>
25,000 and under	120	26	268	52	480	69
25,001-50,000	188	10	226	19	170	38
50,001-100,000	561	12	472	14	526	29
100,001-200,000	537	8	764	11	1,004	18
200,001+	219	5	625	5	1,764	19

**Trend: Permanent Stops in Past 12 Months**

Weekend Package						
Q.18	2014	N	2011	N	2008	N
<b>Industry</b>	<b>587</b>	<b>56</b>	<b>899</b>	<b>82</b>	<b>1,185</b>	<b>148</b>
25,000 and under	180	23	241	35	262	43
25,001-50,000	966	9	1,083	15	625	36
50,001-100,000	3,786	11	4,131	16	4,372	30
100,001+	4,261	13	9,749	12	10,300	35

**Permanent Stops in Past 12 Months**

<b>Sunday Only</b>						
<b>Q.18</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>2,470</b>	<b>70</b>	<b>1,271</b>	<b>113</b>	<b>2,000</b>	<b>157</b>
25,000 and under	403	25	400	46	171	41
25,001-50,000	1,593	11	746	20	845	36
50,001-100,000	5,142	16	7,337	22	4,229	34
100,001-200,000	21,101	11	12,921	13	6,334	22
200,001+	23,185	7	50,000	9	25,402	23

**Permanent Stops in Past 12 Months**

<b>Digital Only</b>		
<b>Q.18</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>220</b>	<b>67</b>
25,000 and under	30	29
25,001-50,000	198	14
50,001-100,000	460	9
100,001-200,000	1,601	9
200,001+	8,440	6

**Permanent Stops in Past 12 Months**

<b>Other Package</b>						
<b>Q.18</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>3,174</b>	<b>35</b>	<b>3,604</b>	<b>74</b>	<b>2,307</b>	<b>92</b>
25,000 and under	1,740	7	287	19	68	14
25,001-50,000	865	6	1,558	14	887	22
50,001-100,000	1,537	8	4,077	20	3,151	16
100,001-200,000	9,725	9	22,110	13	5,566	20
200,001+	10,538	5	42,100	7	17,619	19

**Churn Rate for Print Publications**

The following is based upon a computation using the permanent stop data and the home delivery data submitted by newspapers.

**Churn Rate**

	<b>Daily</b>	<b>Saturday</b>	<b>Sunday</b>
<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

**19. Please provide the following information on delivery type and cost-per-order for both print and digital.**

To find average “cost-per-order” add your direct sales expense and subscriber premium expense, then divide by the total new orders. If you do not break out Cost-per-order by source as listed below, please put the cost-per-order you do track in the “other” category, and specify what is included.

	<b>Print Edition - may include a digital component</b>		<b>Digital Edition without print</b>	
	<b>Percent of annual home delivery sales sold by:</b>	<b>Average cost-per-order</b>	<b>Percent of annual home delivery sales sold by:</b>	<b>Average cost-per-order</b>
a. Telemarketing	_____ %	\$ _____	_____ %	\$ _____
b. Carriers	_____ %	\$ _____	_____ %	\$ _____
c. Crew Sales	_____ %	\$ _____	_____ %	\$ _____
d. Direct Mail	_____ %	\$ _____	_____ %	\$ _____
e. Kiosks	_____ %	\$ _____	_____ %	\$ _____
f. Internet (Own newspaper websites)	_____ %	\$ _____	_____ %	\$ _____
g. Internet partner (e.g. Groupon)	_____ %	\$ _____	_____ %	\$ _____
h. Internet Social media site (e.g., Facebook)	_____ %	\$ _____	_____ %	\$ _____
i. District-Manager Sales	_____ %	\$ _____	_____ %	\$ _____
j. Single Copy Inserts	_____ %	\$ _____	_____ %	\$ _____
k. TMC Inserts	_____ %	\$ _____	_____ %	\$ _____
l. Voluntary (does not include websites see above)	_____ %	\$ _____	_____ %	\$ _____
m. Other (Specify): _____	_____ %	\$ _____	_____ %	\$ _____
n. TOTAL	100%	\$ _____	100%	\$ _____

**Trend: Percent of Annual Home Delivery Sales Sold by...**

Trend: Cost Per Order									
Q.19	2014	2011	2008	2014	N	2011	N	2008	N
a. Telemarketing	20%	21%	24%	\$28.00	94	\$23.00	156	\$23.00	286
b. Carriers	3	4	5	15.00	65	12.00	122	13.00	246
c. Crew Sales	4	5	8	37.50	42	31.00	69	30.00	159
d. Direct Mail	7	7	5	41.00	80	21.00	129	25.00	210
e. Kiosks	17	14	12	48.00	77	35.00	144	35.00	239
• Internet (Net)*	-	5	3	12.00	50	9.00	63	10.00	101
f. Own site	6			5.00	31				
g. Internet partner (i.e. Groupon)	2			20.50	13				
h. Social media site (e.g., Facebook)	<1			21.00	26				
i. District-Manager Sales	4	5	4	10.00	40	10.00	69	11.00	145
• Single copy/TMC Inserts/FSIs**	-	7	6	15.00	80	13.00	119	12.00	205
j. Single Copy	6			15.00	73				
k. TMC Inserts/FSI's	2			12.00	37				
l. Voluntary	23	21	25	5.00	16	10.00	21	10.00	54
m. Other	6	10	7	15.00	33	10.00	62	15.00	92

\* Internet – asked as one question in 2008/2011, asked as three items netted in 2014.  
Cost per order is based on those using the respective sales methods.

\*\* asked as one question in 2008/2011, asked as two items in 2014.  
Cost per order is based on those using the respective sales methods.

e. Source of New Subscriptions Digital Edition Without Print.

**Trend: Percent of Annual Home Delivery Sales Sold by...  
(excluding Voluntary)**

Q.19	2014	2011	2008
a. Telemarketing	26%	27%	32%
b. Carriers	4	5	7
c. Crew Sales	5	6	11
d. Direct Mail	9	9	7
e. Kiosks	22	18	16
• Internet (Net)*	-	6	4
f. Own site	8		
g. Social media site (e.g., Facebook)	1		
h. Internet partner	3		
i. District-Manager Sales	5	6	5
j/k. Single Copy & TMC Inserts/FSI's	9	9	8
m. Other	10	13	9

\* Internet – asked as one question in 2008/2011, asked as three items netted in 2014.  
Cost per order is based on those using the respective sales methods.

e. Source of New Subscriptions Digital Edition Without Print.

Q.19	Trend: Percent of Annual Digital Sales Sold by...	Trend: Cost Per Order	
a. Telemarketing	3%		
b. Carriers	*		
c. Crew Sales	*		
d. Direct Mail	2		
e. Kiosks	2		
• Internet (Net)*	-		
f. Own site	51		\$6.23
g. Internet partner (i.e. Groupon)	2		
h. Social media site (e.g., Facebook)	3		
i. District-Manager Sales	1		
• Single copy/TMC Inserts/FSIs	-		
j. Single Copy	-		
k. TMC Inserts/FSI's	1		
l. Voluntary	25		
m. Other	10		

\* Internet – asked as one question in 2008/2011, asked as three items netted in 2014. Cost per order is based on those using the respective sales methods.

## 20. Do you have a customer loyalty/value-added or frequent reader program?

Have Customer Loyalty/Value-Added or frequent Reader Program				
% Yes				
Q.20	2014	N	2011	N
<b>Industry</b>	<b>29%</b>	<b>127</b>	<b>23%</b>	<b>238</b>
25,000 and under	16	70	15	144
25,001-50,000	40	20	25	32
50,001-100,000	35	17	26	27
100,001-200,000	57	14	67	18
200,001+	67	6	50	10

## 21a. Do you have a department dedicated to retention?

Trend: Have Department Dedicated to Retention						
% Yes						
Q.21a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>42%</b>	<b>127</b>	<b>45%</b>	<b>236</b>	<b>46%</b>	<b>405</b>
25,000 and under	27	70	34	142	32	206
25,001-50,000	65	20	56	32	42	79
50,001-100,000	35	17	59	27	72	50
100,001-200,000	79	14	78	18	69	35
200,001+	67	6	70	10	96	28



**21b. If yes, is the retention department:**

**Trend: Type of Retention Department**

Q.21b	N			In-House			Outside Contractor			Both		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>53</b>	<b>105</b>	<b>187</b>	<b>66%</b>	<b>67%</b>	<b>77%</b>	<b>11%</b>	<b>21%</b>	<b>9%</b>	<b>23%</b>	<b>12%</b>	<b>12%</b>
25,000 and under	19	48	66	79	75	82	5	19	6	16	6	8
25,001-50,000	13	18	33	69	61	79	8	33	12	23	6	9
50,001-100,000	6	16	36	83	56	72	17	25	11	-	19	17
100,001-200,000	11	14	24	36	72	67	18	14	8	46	14	21
200,001+	4	7	27	50	57	78	25	0	7	25	43	15

**22. What is your total budget/spending on retention activities (not including marketing expenses listed above in question 15a-e)?**

**Total Budget/Spending on Retention Activities Excluding Marketing**

Q.22	In-house	N	Outside	N
<b>Industry</b>	<b>\$25,000</b>	<b>35</b>	<b>\$142,417</b>	<b>17</b>
25,000 and under	5,000	13	10,000	2
25,001-50,000	24,400	11	24,506	5
50,001-100,000	45,000	3	115,000	2
100,001+	370,262	8	258,876	8

**23. Does your newspaper track new start retention by order source?**

**Trend: Newspaper Tracks New Start Retention By Order Source**  
**% Yes**

Q.23	2014	N	2011	N	2008	N
<b>Industry</b>	<b>56%</b>	<b>130</b>	<b>59%</b>	<b>237</b>	<b>59%</b>	<b>405</b>
25,000 and under	44	69	49	142	44	206
25,001-50,000	67	21	78	32	57	79
50,001-100,000	61	18	68	28	92	50
100,001-200,000	71	14	72	18	86	5

**24. Please list your new start retention rate (percent remaining active) by order source:**

**Trend: Retention Rates: 13 Weeks**

Q.24	2014	N	2011	N	2008	N
a. Telemarketing	60%	51	59%	101	57%	191
b. Carriers	82	32	72	72	73	159
c. Crew Sales	63	27	62	44	64	119
d. Direct Mail	76	41	79	84	76	158
e. Kiosks	65	47	70	98	68	177
• Internet (Net)*	78	42	78	93	77	155
f. Own internet site	78	40				
g. Internet partner	84	12				
h. Internet social media site	67	8				
h. District-Manager Sales	72	21	71	51	74	113
i. Single Copy & TMC Inserts/FSI's (Net)*	76	38	75	92	72	159
j. Single Copy inserts	76	38				
k. TMC inserts/FSIs	76	18				
l. Voluntary**	76	48				
m. Other	34	18	71	37	70	82

\* Internet - asked as one question in 2008/2011, three items netted in 2014; FSIs asked as one question earlier, 2 items netted now.

\*\* new in 2014.

**Trend: Retention Rates: 26 Weeks**

Q.24	2014	N	2011	N	2008	N
a. Telemarketing	45%	49	45%	102	42%	184
b. Carriers	65	32	63	77	59	154
c. Crew Sales	33	25	37	45	38	121
d. Direct Mail	64	40	67	86	63	155
e. Kiosks	46	45	51	102	50	171
• Internet (Net)	67	41	64	95	64	153
f. Own internet site*	67	38				
g. Internet partner	67	11				
h. Internet social media site	62	8				
h. District-Manager Sales	57	20	61	51	61	110
i. Single Copy & TMC Inserts/FSI's (net)*			64	94	60	153
j. Single Copy inserts	65	40				
k. TMC inserts/FSIs	64	17				
l. Voluntary	67	47				
m. Other	61	16	58	36	57	80

\* Internet - one item in 2008/2011, three items netted in 2014; FSIs 1 item earlier, 2 items netted now.

**Trend: Retention Rates: 52 Weeks**

Q.24	2014	N	2011	N	2008	N
a. Telemarketing	34	46	36%	102	33%	173
b. Carriers	53	31	49	69	48	148
c. Crew Sales	24	23	24	50	25	119
d. Direct Mail	53	39	55	86	49	147
e. Kiosks	34	45	36	102	37	165
Internet (Net)	54	41	54	95	53	146
f. Own internet site*	54	38				
g. Internet partner	54	12				
h. Internet social media site	54	8				
h. District-Manager Sales	48	22	48	52	49	106
i. Single Copy & TMC *Inserts/FSI's (net)			48	90	49	144
j. Single Copy inserts	51	37				
k. TMC inserts/FSIs	52	17				
L. Voluntary**	56	46				
M. Other	48	17	50	37	46	80

\* Internet—one item in 2008/2011, three items netted in 2014; FSIs 1 item earlier, 2 items netted now.

\*\* New in 2014.

**25a. My new start retention rate total for print is:**

	<b>13-Weeks Retention Rate</b>	<b>26-Weeks Retention Rate</b>	<b>52-Weeks Retention Rate</b>
Total Subscription Sales	_____%	_____%	_____%
Total Voluntary Starts	_____%	_____%	_____%
Total Starts	_____%	_____%	_____%

**Trend: New Start Retention Rates**

Q.25 print*	13-Weeks			26-Weeks			52-Weeks		
	2014 N=85	2011 N=103	2008 N=240	2014 N=104	2011 N=104	2008 N=240	2014 N=81	2011 N=104	2008 N=240
Total Subscription Sales	65%	67%	66%	53%	53%	51%	44%	41%	41%
Total Voluntary Starts	73	74	75	63	64	64	55	55	53
Total Starts	71	70	70	58	56	56	49	44	45

\* Asked overall previously, now asked about print.

**25b. My new start retention rate total for digital is:**

	<b>13-Weeks Retention Rate</b>	<b>26-Weeks Retention Rate</b>	<b>52-Weeks Retention Rate</b>
Total Subscription Sales	_____ %	_____ %	_____ %
Total Voluntary Starts	_____ %	_____ %	_____ %
Total Starts	_____ %	_____ %	_____ %

**Trend: New Start Retention Rates**

	<b>13-Weeks</b>	<b>26-Weeks</b>	<b>52-Weeks</b>
<b>Q.25 digital*</b>	<b>N=51</b>	<b>N=49</b>	<b>N=53</b>
Total Subscription Sales	78%	67%	57%
Total Voluntary Starts	80	69	61
Total Starts	81	70	61

\* Digital retention rate not asked before.

**26. What % of total subscription sales are transacted via:**

Credit/Debit (credit-debit cards recurring bank draft)	_____ %
Cash	_____ %
No payment	_____ %

**Trend: How Subscription Sales Effort is Transacted**

<b>Q.26</b>	<b>N</b>			<b>Credit/Debt</b>			<b>Cash</b>			<b>No Payment</b>		
	<b>2014</b>	<b>2011</b>	<b>2008</b>	<b>2014</b>	<b>2011</b>	<b>2008</b>	<b>2014</b>	<b>2011</b>	<b>2008</b>	<b>2014</b>	<b>2011</b>	<b>2008</b>
<b>Industry</b>	<b>103</b>	<b>172</b>	<b>279</b>	<b>46</b>	<b>37%</b>	<b>38%</b>	<b>38</b>	<b>45%</b>	<b>34%</b>	<b>15</b>	<b>18%</b>	<b>28%</b>
25,000 and under	55	108	147	39	34	36	48	51	40	14	15	24
25,001-50,000	18	24	49	52	39	38	26	41	33	14	19	29
50,001-100,000	14	19	37	50	43	42	24	32	28	21	25	30
100,001-200,000	11	13	21	59	45	39	22	28	23	11	27	39
200,001+	5	5	25	67	46	42	36	23	18	7	30	40

**27. Please list your retention rate for new starts by payment type:**

	<b>13-Weeks Retention Rate</b>	<b>26-Weeks Retention Rate</b>	<b>52-Weeks Retention Rate</b>
a. Credit Card (recurring/EZ Pay)	_____ %	_____ %	_____ %
b. Bank Debit (recurring/EZ PAY)	_____ %	_____ %	_____ %
c. Pay-by-mail (Single payment/CC/Check)	_____ %	_____ %	_____ %
d. Carrier Collect	_____ %	_____ %	_____ %
e. Other (Specify): _____	_____ %	_____ %	_____ %

**Trend: New Start Retention Rates By Payment Type  
13-Weeks**

<b>Q.27</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
Credit Card	72%	51	75%	74	73%	148
Bank Debit	70	37	80	57	73	115
Pay-by-mail	67	54	69	81	68	151
Carrier Collect	87	9	60	23	57	53
Other	82	9	76	7	52	21

**Trend: New Start Retention Rates By Payment Type  
26-Weeks**

<b>Q.27</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
Credit Card	67%	47	66%	69	68%	133
Bank Debit	65	34	69	56	70	104
Pay-by-mail	58	51	57	78	56	136
Carrier Collect	80	8	56	20	51	48
Other	79	8	67	7	39	16

**Trend: New Start Retention Rates By Payment Type  
52-Weeks**

<b>Q.27</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
Credit Card	61%	49	58%	71	60%	139
Bank Debit	62	36	63	56	63	109
Pay-by-mail	50	51	47	79	49	142
Carrier Collect	71	8	46	21	42	49
Other	70	8	49	9	23	17

## SECTION V: Digital Marketing

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

\_\_\_\_\_ %

Median percentage of eligible subscriber base that has activated

Q.28a	%	N
<b>Industry</b>	<b>25</b>	<b>109</b>
25,000 and under	21	57
25,001-50,000	25	17
50,001-100,000	24	14
100,001-200,000	29	13
200,001+	61	8

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

Median number of digital-only subscribers

Q.28b		N
<b>Industry</b>	<b>587</b>	<b>112</b>
25,000 and under	219	57
25,001-50,000	1,402	18
50,001-100,000	1,878	16
100,001-200,000	4,021	13
200,001+	10,202	8

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

Median churn rate for digital-only subscribers

Q.28c	%	N
<b>Industry</b>	<b>28</b>	<b>95</b>
25,000 and under	30	48
25,001-50,000	18	16
50,001-100,000	32	14
100,001-200,000	25	11
200,001+	41	6

**28d. What % of your digital subscribers are in your core market?**

**Median Percentage of Digital Subscribers in Core Market**

Q.28d	%	N
<b>Industry</b>	<b>65</b>	<b>95</b>
25,000 and under	53	50
25,001-50,000	72	17
50,001-100,000	70	13
100,001-200,000	63	10
200,001+	78	5

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

**Median Percentage of Subscribers Who Have Accessed their Digital Replica Edition**

Q.28e	%	N
<b>Industry</b>	<b>26</b>	<b>96</b>
25,000 and under	23	47
25,001-50,000	78	16
50,001-100,000	17	14
100,001-200,000	50	13
200,001+	23	6

## SECTION VI: Home Delivery

**29a. Do you offer current subscribers discounts for long-term advance payment subscriptions?**

**Trend: Offer Discounts for Long-Term Advance Payment**  
**% Yes**

Q.29a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>53%</b>	<b>124</b>	<b>58%</b>	<b>240</b>	<b>59%</b>	<b>405</b>
25,000 and under	62	66	66	142	60	206
25,001-50,000	63	19	52	33	58	79
50,001-100,000	35	17	44	27	62	50
100,001-200,000	29	14	38	21	51	35
200,001+	38	8	30	10	57	28

**29b. If yes, please indicate the discount given per period:**

**% DISCOUNT**

3 months - 6 months \_\_\_\_\_ %

6 months - 12 months \_\_\_\_\_ %

12 months & Over \_\_\_\_\_ %

**Trend: Median Discount Given Per Period  
3 months and over**

Q.29b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>7%</b>	<b>61</b>	<b>6%</b>	<b>134</b>	<b>8%</b>	<b>77</b>
25,000 and under	5	38	5	93	7	40
25,001-50,000	8	12	n/a	16	5	13
50,001-100,000	10	5	13	12	26	12
100,001-200,000	38	3	10	7	13	6
200,001+	40	3	n/a	3	25	6

**Trend: Median Discount Given Per Period  
6 months and over**

Q.29b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>8%</b>	<b>61</b>	<b>6%</b>	<b>134</b>	<b>7%</b>	<b>164</b>
25,000 and under	6	38	7	93	7	87
25,001-50,000	7	12	4	16	5	33
50,001-100,000	10	5	8	12	7	23
100,001-200,000	38	3	2	7	10	11
200,001+	40	3	9	3	15	10

**Trend: Median Discount Given Per Period  
12 months and over**

Q.29b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>8%</b>	<b>61</b>	<b>9%</b>	<b>134</b>	<b>10%</b>	<b>223</b>
25,000 and under	7	38	9	93	10	118
25,001-50,000	8	12	8	16	10	45
50,001-100,000	10	5	14	12	8	29
100,001-200,000	30	3	6	7	13	16
200,001+	40	3	5	3	12	15



**Trend: Types of Subscription Payments Accepted**

Q.29	N			Credit Cards			Recurring Bank Debit			Recurring Credit Cards			Internet Transactions			Bill by e-mail		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>113</b>	<b>228</b>	<b>405</b>	<b>99%</b>	<b>99%</b>	<b>94%</b>	<b>90%</b>	<b>86%</b>	<b>82%</b>	<b>100%</b>	<b>97%</b>	<b>92%</b>	<b>89%</b>	<b>84%</b>	<b>66%</b>	<b>32%</b>	<b>25%</b>	<b>9%</b>
5,000 and under	59	137	206	98	98	92	92	86	81	100	96	87	85	82	58	27	18	9
5,001-50,000	19	32	79	100	100	96	95	88	77	100	100	96	100	84	65	32	38	5
50,001-100,000	14	25	50	100	100	96	100	88	92	100	100	96	93	84	80	29	32	10
100,001-200,000	13	20	35	100	100	97	69	80	86	100	100	97	92	90	89	31	25	9
200,001+	8	10	28	100	100	96	88	90	86	100	100	100	88	90	71	75	50	25

**30. Do you offer a lower subscription rate to subscribers for participating in a recurring 'easy pay' payment plan?**

**Trend: Offer Lower Subscription Rate for Easy Payment Plan  
% Yes**

Q.30	2014	N	2011	N	2008	N
<b>Industry</b>	<b>59%</b>	<b>122</b>	<b>74%</b>	<b>238</b>	<b>92%</b>	<b>405</b>
25,000 and under	78	64	83	141	88	206
25,001-50,000	58	19	76	33	96	79
50,001-100,000	35	17	74	27	96	50
100,001-200,000	29	14	33	21	97	35
200,001+	13	8	20	10	100	28

**31. Please answer the following questions for your subscription payments.**

	<b>Do you accept:</b>	<b>Percentage of home-delivery subscribers who pay by:</b>	<b>Percent discount from the subscriber's home delivery rate for each payment method (a-e)</b>
a. Credit cards (single payment)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____%	_____%
b. Recurring bank debit (EZ Pay)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____%	_____%
c. Recurring credit cards (EZ Pay)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____%	_____%
d. Internet transactions?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____%	_____%
e. Bill by email (e-billing)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____%	_____%

**Trend: Percentage of Subscribers Paying by...**

Q.31	Credit Cards			Recurring Bank Debit			Recurring Credit Cards			Internet Transactions			Bill by e-mail		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>25%</b>	<b>19%</b>	<b>20%</b>	<b>10%</b>	<b>10%</b>	<b>12%</b>	<b>19%</b>	<b>17%</b>	<b>16%</b>	<b>4%</b>	<b>3%</b>	<b>4%</b>	<b>3%</b>	<b>6%</b>	<b>*</b>
25,000 and under	23	19	21	10	9	13	14	12	12	4	2	5	3	11	*
25,001-50,000	25	13	21	17	14	11	24	21	16	3	5	3	1	2	*
50,001-100,000	29	19	16	7	8	13	22	20	22	5	3	3	4	2	*
100,001-200,000	31	22	13	9	4	13	34	21	20	9	4	8	1	3	*
200,001+	28	23	18	1	11	8	30	32	26	2	6	2	16	2	*

\*Base too small.

**Trend: Percent Discount by Payment Form**

Q.31	Credit Cards			Recurring Bank Debit			Recurring Credit Cards			Internet Transactions			Bill by e-mail		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>13</b>	<b>15%</b>	<b>21%</b>	<b>10</b>	<b>12%</b>	<b>14%</b>	<b>10</b>	<b>13%</b>	<b>14%</b>	<b>13</b>	<b>9%</b>	<b>20%</b>	<b>14</b>	<b>6%</b>	<b>5%</b>
25,000 and under	12	11	23	10	12	14	10	12	13	9	9	16	13	5	-
25,001-50,000	1	17	9	8	15	11	7	15	11	1	4	10	1	3	-
50,001-100,000	22	10	29	22	9	17	22	10	18	27	8	29	33	12	-
100,001-200,000	35	22	21	14	5	9	14	14	12	35	5	15	-	1	5
200,001+	-	n/a	35	15	6	18	15	6	22	-	n/a	60	-	n/a	-

**31a. Do you charge different rates to subscribers based upon their demographic or geographic characteristics?**

**Do You Charge Different Rates for Different Demographic or Geographic Characteristics?**

Q.31a	Yes	No
<b>Industry</b>	<b>51%</b>	<b>49%</b>
25,000 and under	40	60
25,001-50,000	58	42
50,001-100,000	75	25
100,001-200,000	54	46
200,001+	75	25

**32. How many days is service continued after the start date for new starts and after expiration date for renewals (grace period)?**

- a. New Starts    1-15 days    16-30 days    31-45 days    46-60 days    61-90 days    91 days or more
- b. Renewals    1-15 days    16-30 days    31-45 days    46-60 days    61-90 days    91 days or more

**Trend: Days Service Is Continued After the Start Date**

Q.32a,b	New Starts			Renewals		
	2014 N=114	2011 N=228	2008 N=364	2014 N=114	2011 N=226	2008 N=364
1-15	13	12%	16%	10	14%	18%
16-30	40	45	33	36	39	26
31-45	25	18	22	25	18	22
46-60	5	14	12	8	12	13
61-90	17	10	15	21	16	17
91 days or more	1	1	0	1	1	0

**32c. Do your grace periods vary based on:**

- Subscription characteristics?    Subscription types?

**Grace Period Varies by...**

Q.32c	N	Subscription Characteristics	Subscription Types	None of the Above
<b>Industry</b>	<b>115</b>	<b>18%</b>	<b>30%</b>	<b>59%</b>
25,000 and under	62	16	32	60
25,001-50,000	19	26	21	63
50,001-100,000	14	21	29	50
100,001-200,000	12	25	42	50
200,001+	8	-	25	75

**32d. Do you have the capability to bill your subscribers by email/electronically?**

**Trend: Have Capability to Bill by Email/Electronically**  
% Yes

Q.32d	2014	N	2011	N	2008	N
<b>Industry</b>	<b>42%</b>	<b>117</b>	<b>28%</b>	<b>232</b>	<b>19%</b>	<b>364</b>
25,000 and under	39	61	25	139	15	181
25,001-50,000	58	19	36	33	17	69
50,001-100,000	33	15	32	25	25	48
100,001-200,000	29	14	15	20	18	33
200,001+	63	8	60	10	37	27

### 32e. What percentage of your total subscribers pay the newspaper electronically?

**Trend: Median Percentage of Total Subscribers Who Pay Electronically**  
% Yes

Q.32e	2014	N	2011	N	2008	N
<b>Industry</b>	<b>18%</b>	<b>39</b>	<b>7%</b>	<b>79</b>	<b>4%</b>	<b>62</b>
25,000 and under	5	18	7	44	3	24
25,001-50,000	16	7	5	7	7	10
50,001-100,000	14	5	10	12	20	11
100,001-200,000	22	6	10	10	20	4
200,001+	65	3	4	5	3	10

### 33. Does your newspaper charge nonsubscribers for digital access to your website content?

**Charge Nonsubscribers for Digital Access to their Newspaper's Website**  
% Yes

Q.33	2014	N	2011	N
<b>Industry</b>	<b>75%</b>	<b>119</b>	<b>27%</b>	<b>233</b>
25,000 and under	76	63	28	139
25,001-50,000	84	19	25	32
50,001-100,000	63	16	19	26
100,001-200,000	69	13	20	20
200,001+	75	8	40	10

### 34. Do you bill print subscribers in weekly or in monthly increments?

Weekly  Monthly

**Increments in Which Subscribers are Billed**

Q.34	2014	2011	2014	2011	2014	2011
	N	N	Weekly		Monthly	
<b>Industry</b>	<b>116</b>	<b>233</b>	<b>49</b>	<b>46%</b>	<b>51</b>	<b>54%</b>
25,000 and under	61	140	38	33	62	67
25,001-50,000	19	32	53	59	47	41
50,001-100,000	15	26	60	65	40	35
100,001-200,000	13	20	69	85	31	15
200,001+	8	9	75	78	25	22

**35a. Please record your average stated price for each subscription package you offer, either weekly or monthly as indicated in Q.34. (Exclude tax paid by subscriber) Also, indicate if this includes complete digital access.**

	<b>Bill weekly</b>	<b>Bill monthly</b>	<b>Includes Complete Digital Access?</b>	
a. Weekday and Sunday home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Weekday only home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Weekend only (Sat/Sun) home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
d. Sunday only home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
e. Digital only	Price: \$_____ per week	Price: \$_____ per month		
f. Other (Specify): _____	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**35b. Please record the average price or net revenue for each subscription package you offer, either weekly or monthly as indicated in Q.34. (Exclude tax paid by subscriber) Also, indicate if this includes complete digital access.**

	<b>Bill weekly</b>	<b>Bill monthly</b>	<b>Includes Complete Digital Access?</b>	
a. Weekday and Sunday home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Weekday only home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Weekend only (Sat/Sun) home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
d. Sunday only home delivery	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No
e. Digital only	Price: \$_____ per week	Price: \$_____ per month		
f. Other (Specify): _____	Price: \$_____ per week	Price: \$_____ per month	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Trend: Price for One Week of Subscription Package**

<b>Daily and Sunday Package</b>						
<b>Q.35a,a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>\$5.74</b>	<b>52</b>	<b>\$4.50</b>	<b>103</b>	<b>\$3.66</b>	<b>328</b>
25,000 and under	4.63	20	3.83	45	3.14	147
25,001-50,000	5.53	10	4.50	18	3.85	73
50,001-100,000	6.00	7	4.44	16	4.10	47
100,001-200,000	6.65	9	5.11	16	3.94	34
200,001+	6.60	6	5.55	7	4.88	27

**Trend: Median Price for One Week of Subscription Package**

<b>Daily Only</b>						
<b>Q.35a,b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>\$4.22</b>	<b>52</b>	<b>\$3.00</b>	<b>103</b>	<b>\$2.67</b>	<b>220</b>
25,000 and under	3.14	20	3.00	45	2.51	84
25,001-50,000	4.90	10	3.11	18	2.72	53
50,001-100,000	3.80	7	2.78	16	2.48	36
100,001-200,000	5.50	9	4.00	16	2.51	24
200,001+	7.50	6	3.48	7	3.47	23

**Trend: Price for One Week of Subscription Package**

<b>Weekend Package</b>						
<b>Q.35a,c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>\$3.50</b>	<b>52</b>	<b>\$2.65</b>	<b>103</b>	<b>\$2.34</b>	<b>190</b>
25,000 and under	2.80	20	2.48	45	1.90	65
25,001-50,000	3.50	10	2.50	18	2.38	51
50,001-100,000	3.50	7	2.55	16	2.43	31
100,001-200,000	3.65	9	3.37	16	2.23	23
200,001+	3.53	6	2.57	7	3.54	20

**Trend: Price for One Week of Subscription Package**

<b>Sunday Only</b>						
<b>Q.35a,d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>\$2.49</b>	<b>52</b>	<b>\$2.00</b>	<b>103</b>	<b>\$1.86</b>	<b>207</b>
25,000 and under	2.03	20	1.75	45	1.49	65
25,001-50,000	2.75	10	2.00	18	1.86	49
50,001-100,000	2.45	7	2.10	16	1.94	38
100,001-200,000	2.95	9	2.28	16	1.96	30
200,001+	2.87	6	2.12	7	2.58	25

**Trend: Price for One Week of Subscription Package**

Digital only		
Q.35a,e	2014	N
<b>Industry</b>	<b>\$2.99</b>	<b>52</b>
25,000 and under	3.35	20
25,001-50,000	3.00	10
50,001-100,000	3.74	7
100,001-200,000	2.30	9
200,001+	2.99	6

**Trend: Price for One Week of Subscription Package**

Other Package						
Q.35a,e	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$3.75</b>	<b>52</b>	<b>\$3.02</b>	<b>103</b>	<b>\$2.73</b>	<b>125</b>
25,000 and under	3.01	20	2.44	45	2.75	33
25,001-50,000	2.93	10	2.75	18	2.51	29
50,001-100,000	4.18	7	3.00	16	2.52	24
100,001-200,000	5.27	9	3.12	16	2.77	22
200,001+	4.25	6	2.88	7	3.29	17

**Price for One Month of Subscription Package**

Daily and Sunday Package				
Q.35a,a	2014	N	2011	N
<b>Industry</b>	<b>\$16.00</b>	<b>58</b>	<b>\$14.83</b>	<b>120</b>
25,000 and under	14.50	38	13.65	90
25,001-50,000	17.80	9	17.25	13
50,001-100,000	24.07	5	18.00	9
100,001+	21.00	6	19.43	4

**Price for One Month of Subscription Package**

Daily Only				
Q.35a,b	2014	N	2011	N
<b>Industry</b>	<b>\$12.18</b>	<b>58</b>	<b>\$11.52</b>	<b>120</b>
25,000 and under	11.25	38	10.94	90
25,001-50,000	15.99	9	11.74	13
50,001-100,000	14.54	5	11.50	9
100,001+	24.00	6	16.56	4

**Price for One Month of Subscription Package**

<b>Weekend Package</b>				
<b>Q.35a,c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>
<b>Industry</b>	<b>\$13.99</b>	<b>58</b>	<b>\$9.00</b>	<b>120</b>
25,000 and under	10.98	38	8.74	90
25,001-50,000	14.50	9	10.50	13
50,001-100,000	22.00	5	10.83	9
100,001+	22.00	6	13.95	4

**Price for One Month of Subscription Package**

<b>Sunday Only</b>				
<b>Q.35a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>
<b>Industry</b>	<b>\$11.05</b>	<b>58</b>	<b>\$7.60</b>	<b>120</b>
25,000 and under	10.22	38	6.93	90
25,001-50,000	10.33	9	8.00	13
50,001-100,000	15.19	5	9.75	9
100,001+	21.00	6	15.80	4

**Price for One Month of Subscription Package**

<b>Digital Only</b>		
<b>Q.35a</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$11.49</b>	<b>58</b>
25,000 and under	10.99	38
25,001-50,000	8.50	9
50,001-100,000	14.99	5
100,001+	12.00	6

**Price for One Month of Subscription Package**

<b>Other</b>				
<b>Q.35a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>
<b>Industry</b>	<b>\$18.50</b>	<b>58</b>	<b>\$11.98</b>	<b>120</b>
25,000 and under	15.96	38	11.61	90
25,001-50,000	18.58	9	13.93	13
50,001-100,000	18.90	5	12.50	9
100,001+	22.26	6	13.07	4



Price Includes complete digital access: % Yes

Weekday and Sunday Package				
Q.35a,a	2014	N	2011	N
<b>Industry</b>	<b>87%</b>	<b>113</b>	<b>27%</b>	<b>216</b>
25,000 and under	80	61	22	126
25,001-50,000	95	19	29	31
50,001-100,000	93	14	28	25
100,001-200,000	100	11	50	20
200,001+	88	8	33	9

Price Includes complete digital access: % Yes

Weekday only				
Q.35a,b	2014	N	2011	N
<b>Industry</b>	<b>62%</b>	<b>113</b>	<b>17%</b>	<b>216</b>
25,000 and under	46	61	11	126
25,001-50,000	74	19	14	31
50,001-100,000	71	14	26	25
100,001-200,000	90	11	35	20
200,001+	88	8	29	9

Price Includes complete digital access: % Yes

Weekend-Only				
Q.35a,c	2014	N	2011	N
<b>Industry</b>	<b>60%</b>	<b>113</b>	<b>15%</b>	<b>216</b>
25,000 and under	44	61	9	126
25,001-50,000	63	19	19	31
50,001-100,000	85	14	24	25
100,001-200,000	90	11	26	20
200,001+	75	8	25	9

Price Includes complete digital access: % Yes

Sunday only				
Q.35a,d	2014	N	2011	N
<b>Industry</b>	<b>64%</b>	<b>113</b>	<b>22%</b>	<b>216</b>
25,000 and under	49	61	15	126
25,001-50,000	68	19	30	31
50,001-100,000	85	14	36	25
100,001-200,000	100	11	25	20
200,001+	71	8	22	9

**Price Includes complete digital access: % Yes**

Other				
Q.35a,e	2014	N	2011	N
<b>Industry</b>	<b>42%</b>	<b>113</b>	<b>22%</b>	<b>216</b>
25,000 and under	36	61	15	126
25,001-50,000	33	19	30	31
50,001-100,000	60	14	36	25
100,001-200,000	44	11	25	20
200,001+	75	8	22	9

**Average Net Revenue Price for One Week of Subscription Package**

Daily and Sunday Home Delivery Package		
Q.35b,a	2014	N
<b>Industry</b>	<b>\$4.60</b>	<b>43</b>
25,000 and under	3.79	15
25,001-50,000	5.10	10
50,001-100,000	4.30	7
100,001+	4.96	11

**Average Net Revenue Price for One Week of Subscription Package**

Daily-Only Home Delivery		
Q.35b,b	2014	N
<b>Industry</b>	<b>\$3.44</b>	<b>43</b>
25,000 and under	3.11	15
25,001-50,000	4.00	10
50,001-100,000	3.00	7
100,001+	4.11	11

**Average Net Revenue Price for One Week of Subscription Package**

Weekend-only Home Delivery Package		
Q.35b,c	2014	N
<b>Industry</b>	<b>\$2.72</b>	<b>43</b>
25,000 and under	1.93	15
25,001-50,000	3.00	10
50,001-100,000	2.66	7
100,001+	2.95	11

**Average Net Revenue Price for One Week of Subscription Package**

<b>Sunday-Only Home Delivery</b>		
<b>Q.35b,d</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$1.90</b>	<b>43</b>
25,000 and under	1.25	15
25,001-50,000	2.21	10
50,001-100,000	1.95	7
100,001+	2.12	11

**Average Net Revenue Price for One Week of Subscription Package**

<b>Digital-only Package</b>		
<b>Q.35b,e</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$2.25</b>	<b>43</b>
25,000 and under	2.31	15
25,001-50,000	2.44	10
50,001-100,000	1.80	7
100,001+	3.60	11

**Average Net Revenue Price for One Month of Subscription Package**

<b>Weekday and Sunday Home Delivery Package</b>		
<b>Q.35b,a</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$17.13</b>	<b>53</b>
25,000 and under	15.47	33
25,001-50,000	19.99	9
50,001-100,000	20.00	5
100,001+	26.99	6

**Average Net Revenue Price for One Month of Subscription Package**

<b>Daily-Only Home Delivery</b>		
<b>Q.35b,b</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$13.28</b>	<b>53</b>
25,000 and under	11.50	33
25,001-50,000	15.99	9
50,001-100,000	16.26	5
100,001+	18.18	6

**Average Net Revenue Price for One Month of Subscription Package**

<b>Weekend-only Home Delivery Package</b>		
<b>Q.35b,c</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$12.89</b>	<b>53</b>
25,000 and under	11.00	33
25,001-50,000	13.02	9
50,001-100,000	13.00	5
100,001+	14.36	6

**Average Net Revenue Price for One Month of Subscription Package**

<b>Sunday-Only Home Delivery</b>		
<b>Q.35b,d</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$9.99</b>	<b>53</b>
25,000 and under	9.99	33
25,001-50,000	8.79	9
50,001-100,000	9.37	5
100,001+	11.09	6

**Average Net Revenue Price for One Month of Subscription Package**

<b>Digital-only Package</b>		
<b>Q.35b,e</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$9.99</b>	<b>53</b>
25,000 and under	10.00	33
25,001-50,000	7.99	9
50,001-100,000	10.91	5
100,001+	9.99	6

**Average Net Revenue Price for One Month of Subscription Package**

<b>Other Package</b>		
<b>Q.35b,f</b>	<b>2014</b>	<b>N</b>
<b>Industry</b>	<b>\$15.75</b>	<b>53</b>
25,000 and under	18.10	33
25,001-50,000	15.75	9
50,001-100,000	12.61	5
100,001+	14.76	6

## SECTION VII: Single Copy Operations

**36. Please list the prices offered by your newspaper.**

**36a. Weekday single copy.**

Daily price: \$ \_\_\_\_\_

### Trend: Prices Offered by Newspaper

Weekday Single Copy						
Q.36a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$1.00</b>	<b>124</b>	<b>\$0.75</b>	<b>256</b>	<b>\$0.50</b>	<b>386</b>
25,000 and under	0.75	65	0.75	146	0.50	196
25,001-50,000	1.00	20	0.75	42	0.75	77
50,001-100,000	1.00	17	0.75	29	0.50	47
100,001-200,000	1.00	14	1.00	21	0.75	33
200,001+	1.25	8	1.00	10	0.75	28

**36b. Weekday single copy premium day(s).**

Daily price: \$ \_\_\_\_\_

### Trend: Prices Offered by Newspaper

Weekday Single Copy Premium Day(s)						
Q.36b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$1.25</b>	<b>44</b>	<b>\$1.00</b>	<b>81</b>	<b>\$0.50</b>	<b>126</b>
25,000 and under	1.00	23	0.75	51	0.50	62
25,001-50,000	1.38	8	1.00	10	0.75	30
50,001-100,000	1.40	7	1.63	8	0.63	18
100,001-200,000	2.00	5	1.00	9	0.63	6
200,001+	3.00	1	2.00	2	0.75	6

**36c. Please indicate the day(s) in which a premium price is charged:**

Monday     Tuesday     Wednesday     Thursday     Friday     Saturday

### Trend: Days Charging Premium Price (Among those charging at least 1 day)

Q.36c	2014 N=16	2011 N=29	2008 N=39
Monday	6%	10%	18%
Tuesday	6	14	23
Wednesday	13	21	18
Thursday	44	28	33
Friday	6	21	31
Saturday	50	66	64

**36d. Sunday single copy.**

Sunday price: \$ \_\_\_\_\_

**Trend: Prices Offered by Newspaper**

Sunday Single Copy						
Q.36d	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$2.00</b>	<b>113</b>	<b>\$1.50</b>	<b>222</b>	<b>\$1.50</b>	<b>338</b>
25,000 and under	1.63	54	1.50	118	1.25	154
25,001-50,000	2.00	20	1.75	40	1.50	74
50,001-100,000	2.00	17	2.00	26	1.50	46
100,001-200,000	2.00	22	2.00	21	1.50	33
200,001+	2.50	14	2.00	9	1.75	26

**36e. Do you charge a premium for Thanksgiving or any other holiday?**

- Yes, Thanksgiving
- Yes, other holidays or editions (which ones?) \_\_\_\_\_
- No

**Trend: Charge Premium On Holiday  
% Yes**

Q.36e	2014	N			Thanksgiving			Other Holiday		
		2014	2011	2008	2014	2011	2008	2014	2011	2008
<b>Industry</b>	<b>122</b>	<b>303</b>	<b>405</b>	<b>92%</b>	<b>64%</b>	<b>35%</b>	<b>5%</b>	<b>-</b>	<b>-</b>	
25,000 and under	64	177	206	91	55	16	5	-	-	
25,001-50,000	20	45	79	90	87	51	5	2%	-	
50,001-100,000	16	33	50	94	79	66	6	-	-	
100,001-200,000	14	21	35	100	91	60	-	-	-	
200,001+	8	10	28	88	70	54	13	-	4%	

**37. Please provide your newspaper's average return percentages for:**

- |                     | Newsracks | OTC     | Total   |
|---------------------|-----------|---------|---------|
| a. Daily editions:  | _____ %   | _____ % | _____ % |
| b. Sunday editions: | _____ %   | _____ % | _____ % |

**Trend: Median Return percentages for Daily Editions**

Newsracks						
Q.37a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>30%</b>	<b>112</b>	<b>31%</b>	<b>243</b>	<b>29%</b>	<b>342</b>
25,000 and under	25	56	30	139	26	174
25,001-50,000	32	20	37	41	30	68
50,001-100,000	40	16	35	29	30	46
100,001-200,000	33	13	33	21	32	31
200,001+	52	7	39	9	33	23

**Trend: Median Return percentages for Daily Editions**

OTC						
Q.37a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>27%</b>	<b>112</b>	<b>22%</b>	<b>243</b>	<b>21%</b>	<b>328</b>
25,000 and under	25	56	22	139	20	163
25,001-50,000	27	20	24	41	22	68
50,001-100,000	29	16	26	29	22	44
100,001-200,000	26	13	25	21	22	30
200,001+	32	7	25	9	22	23

**Trend: Median Return percentages for Daily Editions**

Total						
Q.37a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>30%</b>	<b>112</b>	<b>26%</b>	<b>243</b>	<b>25%</b>	<b>327</b>
25,000 and under	28	56	25	139	25	159
25,001-50,000	31	20	28	41	25	67
50,001-100,000	31	16	29	29	25	43
100,001-200,000	30	13	30	21	25	32
200,001+	34	7	27	9	26	26

**Trend: Return percentages for Sunday Editions**

Newsracks						
Q.37b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>25%</b>	<b>109</b>	<b>28%</b>	<b>227</b>	<b>27%</b>	<b>292</b>
25,000 and under	22	53	25	125	25	126
25,001-50,000	25	20	30	41	27	67
50,001-100,000	30	16	33	28	31	47
100,001-200,000	25	13	29	21	29	30
200,001+	48	7	32	9	36	22

**Trend: Return percentages for Sunday Editions**

OTC						
Q.37b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>21%</b>	<b>109</b>	<b>18%</b>	<b>227</b>	<b>16%</b>	<b>278</b>
25,000 and under	20	53	18	125	17	116
25,001-50,000	21	20	18	41	15	66
50,001-100,000	22	16	17	28	17	45
100,001-200,000	22	20	19	21	16	29
200,001+	20	13	21	9	17	22

**Trend: Return percentages for Sunday Editions**

Total						
Q.37b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>23%</b>	<b>109</b>	<b>20%</b>	<b>227</b>	<b>20%</b>	<b>284</b>
25,000 and under	23	53	20	125	20	118
25,001-50,000	24	20	19	41	19	65
50,001-100,000	23	16	19	28	20	43
100,001-200,000	22	20	21	21	19	32
200,001+	26	13	25	9	19	26

**38. Please provide your newspaper's average sellout percentages for:**

	Newsracks	OTC	Total
a. Daily editions:	_____ %	_____ %	_____ %
b. Sunday editions:	_____ %	_____ %	_____ %

**Trend: Median Sellout percentages for Daily Editions**

Newsracks						
Q.38a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>17%</b>	<b>108</b>	<b>17%</b>	<b>223</b>	<b>18%</b>	<b>280</b>
25,000 and under	11	52	15	127	14	133
25,001-50,000	25	20	18	38	20	62
50,001-100,000	14	16	18	26	24	39
100,001-200,000	26	13	23	21	23	27
200,001+	21	7	20	8	29	19

**Trend: Median Sellout percentages for Daily Editions**

OTC						
Q.38a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>15%</b>	<b>108</b>	<b>15%</b>	<b>223</b>	<b>17%</b>	<b>273</b>
25,000 and under	10	52	12	127	13	126
25,001-50,000	15	20	19	38	18	63
50,001-100,000	18	16	16	26	20	39
100,001-200,000	29	13	22	21	21	27
200,001+	22	7	15	8	26	18



**Trend: Median Sellout percentages for Daily Editions**

<b>Total</b>						
<b>Q.38a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>20%</b>	<b>108</b>	<b>18%</b>	<b>223</b>	<b>20%</b>	<b>267</b>
25,000 and under	12	52	15	127	18	128
25,001-50,000	20	20	19	38	20	57
50,001-100,000	20	16	17	26	21	37
100,001-200,000	28	13	25	21	22	26
200,001+	25	7	19	8	27	19

**Trend: Sellout percentages for Sunday Editions**

<b>Newsracks</b>						
<b>Q.38b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>18%</b>	<b>106</b>	<b>17%</b>	<b>223</b>	<b>20%</b>	<b>238</b>
25,000 and under	13	50	15	127	17	95
25,001-50,000	23	20	18	38	20	59
50,001-100,000	18	16	18	26	25	40
100,001-200,000	23	13	23	21	27	26
200,001+	19	7	20	8	27	18

**Trend: Sellout percentages for Sunday Editions**

<b>OTC</b>						
<b>Q.38b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>15%</b>	<b>106</b>	<b>15%</b>	<b>223</b>	<b>18%</b>	<b>232</b>
25,000 and under	10	50	12	127	15	91
25,001-50,000	15	20	19	38	17	59
50,001-100,000	17	16	16	26	20	39
100,001-200,000	22	13	22	21	19	26
200,001+	18	7	15	8	22	17

**Trend: Sellout percentages for Sunday Editions**

<b>Total</b>						
<b>Q.38b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>17%</b>	<b>106</b>	<b>18%</b>	<b>223</b>	<b>20%</b>	<b>234</b>
25,000 and under	15	50	15	127	18	96
25,001-50,000	19	20	19	38	19	54
50,001-100,000	18	16	17	26	19	39
100,001-200,000	21	13	25	21	22	26
200,001+	23	7	19	8	23	19

**39a.b. Approximately what percentage of total SINGLE COPY sales is sold through each of the following – daily and Sunday?**

**Trend: Mean percentage of Daily Single Copy Sales Sold Through...**

<b>Newsracks</b>						
<b>Q.39</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>20%</b>	<b>110</b>	<b>26%</b>	<b>234</b>	<b>33%</b>	<b>357</b>
25,000 and under	27	56	28	133	36	180
25,001-50,000	11	19	26	40	27	73
50,001-100,000	15	16	22	29	34	46
100,001-200,000	16	12	23	21	28	32
200,001+	11	7	25	8	31	27

**Trend: Mean percentage of Daily Single Copy Sales Sold Through...**

<b>OTC</b>						
<b>Q.39</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>79%</b>	<b>112</b>	<b>69%</b>	<b>231</b>	<b>62%</b>	<b>357</b>
25,000 and under	73	57	67	132	59	180
25,001-50,000	88	20	75	39	68	73
50,001-100,000	84	16	72	29	63	46
100,001-200,000	84	12	71	20	69	32
200,001+	85	7	74	8	65	27

**Trend: Mean percentage of Daily Single Copy Sales Sold Through...**

<b>Hawkers</b>						
<b>Q.39a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>-</b>	<b>91</b>	<b>1%</b>	<b>130</b>	<b>1%</b>	<b>357</b>
25,000 and under	-	51	0	77	0	180
25,001-50,000	1%	15	0	15	0	73
50,001-100,000	1	12	2	18	2	46
100,001-200,000	-	13	3	16	0	32
200,001+	-	9	3	3	2	27

**Trend: Mean percentage of Daily Single Copy Sales Sold Through...**

<b>Other</b>						
<b>Q.39a</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>2%</b>	<b>85</b>	<b>3%</b>	<b>110</b>	<b>4%</b>	<b>357</b>
25,000 and under	3	50	1	65	5	180
25,001-50,000	-	12	2	13	4	73
50,001-100,000	1	12	9	16	2	46
100,001-200,000	1	7	4	13	3	32
200,001+	7	4	0	2	2	27

**Trend: Mean percentage of Sunday Single Copy Sales Sold Through...**

<b>Newsracks</b>						
<b>Q.39b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>15%</b>	<b>110</b>	<b>20%</b>	<b>234</b>	<b>26%</b>	<b>302</b>
25,000 and under	21	56	24	133	33	132
25,001-50,000	7	19	17	40	21	69
50,001-100,000	10	16	13	29	23	45
100,001-200,000	9	12	11	21	18	31
200,001+	4	7	11	8	12	27

**Trend: Mean percentage of Sunday Single Copy Sales Sold Through...**

<b>OTC</b>						
<b>Q.39b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>80%</b>	<b>112</b>	<b>74%</b>	<b>231</b>	<b>71%</b>	<b>302</b>
25,000 and under	69	57	69	132	64	132
25,001-50,000	92	20	83	39	74	69
50,001-100,000	88	16	78	29	73	45
100,001-200,000	92	12	83	20	78	31
200,001+	93	7	85	8	82	27

**Trend: Mean percentage of Sunday Single Copy Sales Sold Through...**

<b>Hawkers</b>						
<b>Q.39b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>1%</b>	<b>91</b>	<b>2%</b>	<b>130</b>	<b>1%</b>	<b>302</b>
25,000 and under	-	51	1	74	0	132
25,001-50,000	1	15	3	18	1	69
50,001-100,000	2	12	2	18	3	45
100,001-200,000	-	9	5	15	2	31
200,001+	1	4	7	4	5	27

**Trend: Mean percentage of Sunday Single Copy Sales Sold Through...**

<b>Other</b>						
<b>Q.39b</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>5%</b>	<b>85</b>	<b>3%</b>	<b>109</b>	<b>3%</b>	<b>302</b>
25,000 and under	7	50	2	63	2	132
25,001-50,000	-	12	2	14	4	69
50,001-100,000	2	12	8	16	1	45
100,001-200,000	-	7	4	13	2	31
200,001+	6	4	4	2	1	27

### 39c. What is the average sales per outlet?

Trend: Sales Per Outlet of Daily Newspaper

Newsracks						
Q.39c	2014	N	2011	N	2008	N
<b>Industry</b>	<b>5</b>	<b>110</b>	<b>5</b>	<b>234</b>	<b>5</b>	<b>297</b>
25,000 and under	8	56	6	133	7	143
25,001-50,000	2	19	4	40	5	61
50,001-100,000	3	16	3	29	4	44
100,001-200,000	4	12	4	21	5	28
200,001+	2	7	3	8	3	21

Trend: Sales Per Outlet of Daily Newspaper

OTC						
Q.39c	2014	N	2011	N	2008	N
<b>Industry</b>	<b>10</b>	<b>112</b>	<b>11</b>	<b>231</b>	<b>13</b>	<b>295</b>
25,000 and under	11	57	12	132	15	142
25,001-50,000	11	20	12	39	12	61
50,001-100,000	9	16	9	29	11	44
100,001-200,000	7	12	8	20	12	28
200,001+	6	7	7	8	11	20

Trend: Sales Per Outlet of Daily Newspaper

Hawkers*						
Q.39c	2014	N	2011	N	2008	N
<b>Industry</b>	<b>16</b>	<b>9</b>	<b>37</b>	<b>17</b>	<b>33</b>	<b>38</b>
25,000 and under	9	4	31	8	41	6
25,001-50,000	25	1	-	-	24	5
50,001-100,000	22	2	33	3	21	12
100,001-200,000	8	1	40	4	33	6
200,001+	35	1	62	2	57	9

\* Hawkets based on newspapers that have Hawkets.

**Trend: Sales Per Outlet of Daily Newspaper**

<b>Other*</b>						
<b>Q.39c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>14</b>	<b>5</b>	<b>14</b>	<b>10</b>	<b>25</b>	<b>24</b>
25,000 and under	6	2	10	6	12	5
25,001-50,000	4	1	2	1	18	6
50,001-100,000	27	2	26	2	73	5
100,001-200,000	-	-	27	1	24	6
200,001+	-	-	-	-	36	2

\* Other based on newspapers reporting other sales.

**Trend: Sales Per Outlet of Sunday Newspaper**

<b>Newsracks</b>						
<b>Q.39c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>4</b>	<b>110</b>	<b>6</b>	<b>234</b>	<b>5</b>	<b>259</b>
25,000 and under	5	56	7	133	7	108
25,001-50,000	2	19	7	40	5	59
50,001-100,000	5	16	4	29	5	44
100,001-200,000	5	12	5	21	4	27
200,001+	2	7	3	8	3	21

**Trend: Sales Per Outlet of Sunday Newspaper**

<b>OTC</b>						
<b>Q.39c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>19</b>	<b>112</b>	<b>23</b>	<b>231</b>	<b>25</b>	<b>258</b>
25,000 and under	16	57	20	132	23	108
25,001-50,000	21	20	30	39	23	59
50,001-100,000	19	16	28	29	28	44
100,001-200,000	25	12	23	20	30	27
200,001+	16	7	18	8	33	20

**Trend: Sales Per Outlet of Sunday Newspaper**

<b>Hawkers*</b>						
<b>Q.39c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>43</b>	<b>11</b>	<b>47</b>	<b>18</b>	<b>71</b>	<b>47</b>
25,000 and under	46	4	24	4	38	7
25,001-50,000	30	2	44	4	25	4
50,001-100,000	54	1	70	3	45	14
100,001-200,000	54	2	45	4	76	11
200,001+	33	2	67	3	80	11

\* Hawkers based on newspapers that have Hawkercirculation.

**Trend: Sales Per Outlet of Sunday Newspaper**

Other*						
Q.39c	2014	N	2011	N	2008	N
Industry	14	5	18	11	41	22

\* Other based on newspapers reporting other sales.

**39d. What is the average return per outlet?**

	a. Daily	b. Sunday	c. Average Sales per Outlet		d. Average Return per Outlet	
			Daily	Sunday	Daily	Sunday
Newsracks/ vending machines	_____ %	_____ %	_____	_____	_____	_____
Over-the-counter outlets (Stores, newsstands, etc.)	_____ %	_____ %	_____	_____	_____	_____
Street sellers ("hawkers")	_____ %	_____ %	_____	_____	_____	_____
Other (Specify): _____	_____ %	_____ %	_____	_____	_____	_____
<b>TOTAL:</b>	_____ %	_____ %	_____	_____	_____	_____

**Trend: Return Per Outlet of Daily Newspaper**

Newsracks						
Q.39d	2014	N	2011	N	2008	N
Industry	4	110	4	234	2	274
25,000 and under	5	56	5	133	3	130
25,001-50,000	2	19	3	40	2	60
50,001-100,000	4	16	3	29	2	42
100,001-200,000	2	12	3	21	2	24
200,001+	2	7	6	8	2	18

**Trend: Return Per Outlet of Daily Newspaper**

OTC						
Q.39d	2014	N	2011	N	2008	N
Industry	4	112	5	231	4	271
25,000 and under	5	57	6	132	4	129
25,001-50,000	4	20	4	39	3	60
50,001-100,000	3	16	5	29	3	42
100,001-200,000	3	12	4	20	3	24
200,001+	3	7	5	8	3	16

**Trend: Return Per Outlet of Daily Newspaper**

<b>Hawkers*</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>25</b>	<b>9</b>	<b>18</b>	<b>16</b>	<b>8</b>	<b>26</b>
25,000 and under	7	3	12	6	13	4
25,001-50,000	36	2	100	1	5	3
50,001-100,000	53	2	9	3	4	10
100,001-200,000	3	1	13	4	9	2
200,001+	21	1	13	2	14	7

\* Hawkers based on newspapers that have Hawkercs.

**Trend: Return Per Outlet of Daily Newspaper**

<b>Other*</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>15</b>	<b>4</b>	<b>12</b>	<b>5</b>	<b>8</b>	<b>9</b>

\* Other based on newspapers reporting other sales.

**Trend: Return Per Outlet of Sunday Newspaper**

<b>Newsracks</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>3</b>	<b>110</b>	<b>4</b>	<b>234</b>	<b>2</b>	<b>241</b>
25,000 and under	4	56	4	133	3	100
25,001-50,000	2	19	3	40	2	59
50,001-100,000	3	16	4	29	2	42
100,001-200,000	2	12	3	21	2	23
200,001+	2	7	6	8	2	17

**Trend: Return Per Outlet of Sunday Newspaper**

<b>OTC</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>6</b>	<b>112</b>	<b>6</b>	<b>231</b>	<b>5</b>	<b>237</b>
25,000 and under	6	57	6	132	4	98
25,001-50,000	6	20	6	40	4	58
50,001-100,000	6	16	7	29	5	42
100,001-200,000	7	11	5	20	6	23
200,001+	6	6	8	8	6	16

**Trend: Return Per Outlet of Sunday Newspaper**

<b>Hawkers*</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>12</b>	<b>12</b>	<b>19</b>	<b>19</b>	<b>10</b>	<b>34</b>
25,000 and under	9	3	34	5	28	5
25,001-50,000	8	2	13	5	4	3
50,001-100,000	20	3	11	2	10	8
100,001-200,000	11	2	14	4	10	9
200,001+	12	2	14	3	10	9

\* Hawkers based on newspapers that have Hawklers.

**Trend: Return Per Outlet of Sunday Newspaper**

<b>Other*</b>						
<b>Q.39d</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>6</b>	<b>2</b>	<b>9</b>	<b>6</b>	<b>16</b>	<b>10</b>

\*Other based on newspapers reporting other sales.

**40. Please list the number of single copy locations you have in place.**

	<b>NDM/City Zone</b>		<b>RTZ</b>		<b>Total</b>	
	<b>Daily</b>	<b>Sunday</b>	<b>Daily</b>	<b>Sunday</b>	<b>Daily</b>	<b>Sunday</b>
Coin operated newsracks	_____	_____	_____	_____	_____	_____
Retail/over-the-counter	_____	_____	_____	_____	_____	_____
Street hawkers	_____	_____	_____	_____	_____	_____

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

<b>NDM/City Zone</b>						
<b>Q.40</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>94</b>	<b>110</b>	<b>91</b>	<b>226</b>	<b>123</b>	<b>345</b>
25,000 and under	40	55	43	129	53	177
25,001-50,000	87	20	152	36	170	64
50,001-100,000	315	15	379	28	426	46
100,001-200,000	335	13	574	21	750	32
200,001+	475	7	1,105	8	2,073	26



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

RTZ						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>39</b>	<b>102</b>	<b>45</b>	<b>207</b>	<b>61</b>	<b>291</b>
25,000 and under	25	52	20	117	25	149
25,001-50,000	33	18	67	36	110	57
50,001-100,000	69	15	105	25	146	35
100,001-200,000	99	12	268	20	285	29
200,001+	416	5	315	7	779	21

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

Total						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>128</b>	<b>107</b>	<b>150</b>	<b>219</b>	<b>210</b>	<b>315</b>
25,000 and under	70	54	74	123	84	154
25,001-50,000	150	20	254	39	266	67
50,001-100,000	318	16	495	26	663	39
100,001-200,000	420	11	1,030	20	1,197	30
200,001+	772	6	2,075	7	3,038	25

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

NDM/City Zone						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>75</b>	<b>108</b>	<b>90</b>	<b>209</b>	<b>133</b>	<b>295</b>
25,000 and under	35	54	43	114	55	132
25,001-50,000	87	20	125	35	163	61
50,001-100,000	300	15	334	27	404	46
100,001-200,000	155	12	573	21	640	31
200,001+	344	7	665	8	1,349	25

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

RTZ						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>30</b>	<b>100</b>	<b>45</b>	<b>192</b>	<b>72</b>	<b>255</b>
25,000 and under	20	51	21	105	25	117
25,001-50,000	33	18	52	35	110	55
50,001-100,000	50	15	105	24	142	35
100,001-200,000	98	11	226	20	311	28
200,001+	327	5	303	6	510	20

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

Total						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>123</b>	<b>106</b>	<b>146</b>	<b>206</b>	<b>220</b>	<b>281</b>
25,000 and under	61	53	77	111	90	125
25,001-50,000	150	20	230	38	270	63
50,001-100,000	320	16	438	25	555	40
100,001-200,000	259	11	944	20	937	29
200,001+	671	6	1,087	8	1,991	24

**Trend: Median Number of Retail/Over the Counter Locations for Daily Newspaper**

NDM/City Zone						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>174</b>	<b>108</b>	<b>100</b>	<b>224</b>	<b>113</b>	<b>341</b>
25,000 and under	75	55	48	129	44	171
25,001-50,000	203	20	216	35	141	66
50,001-100,000	538	15	496	28	335	46
100,001-200,000	984	13	977	21	736	32
200,001+	1,863	7	2,316	8	1,623	26

**Trend: Median Number of Retail/Over the Counter Locations for Daily Newspaper**

RTZ						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>70</b>	<b>102</b>	<b>58</b>	<b>207</b>	<b>70</b>	<b>295</b>
25,000 and under	31	52	36	117	25	147
25,001-50,000	92	18	97	35	118	62
50,001-100,000	112	15	150	25	170	35
100,001-200,000	390	12	488	20	285	30
200,001+	665	5	1,000	7	702	21

**Trend: Median Number of Retail/Over the Counter Locations for Daily Newspaper**

Total						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>250</b>	<b>107</b>	<b>165</b>	<b>219</b>	<b>205</b>	<b>312</b>
25,000 and under	124	54	90	124	80	149
25,001-50,000	412	20	393	38	261	69
50,001-100,000	585	16	701	26	480	39
100,001-200,000	1,340	11	1,366	20	1,135	30
200,001+	2,301	6	3,000	7	2,500	25

**Trend: Median Number of Retail/Over the Counter Locations for Sunday Newspaper**

NDM/City Zone						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>174</b>	<b>108</b>	<b>101</b>	<b>207</b>	<b>139</b>	<b>291</b>
25,000 and under	78	54	48	114	50	126
25,001-50,000	203	20	214	34	136	62
50,001-100,000	517	15	444	27	324	46
100,001-200,000	974	12	992	21	671	31
200,001+	1,800	7	2,025	8	1,558	26

**Trend: Median Number of Retail/Over the Counter Locations for Sunday Newspaper**

RTZ						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>70</b>	<b>100</b>	<b>59</b>	<b>192</b>	<b>75</b>	<b>257</b>
25,000 and under	30	51	32	105	26	113
25,001-50,000	103	18	99	34	119	59
50,001-100,000	130	15	118	24	155	35
100,001-200,000	450	11	496	20	270	29
200,001+	775	5	1,075	6	702	21

**Trend: Median Number of Retail/Over the Counter Locations for Sunday Newspaper**

Total						
Q.40	2014	N	2011	N	2008	N
<b>Industry</b>	<b>265</b>	<b>106</b>	<b>172</b>	<b>206</b>	<b>225</b>	<b>277</b>
25,000 and under	128	53	96	112	80	119
25,001-50,000	409	20	381	37	253	64
50,001-100,000	577	16	667	25	503	40
100,001-200,000	1,469	11	1,509	20	1,076	29
200,001+	2,382	6	3,322	8	2,428	25

**Trend: Median Number of Street Hawker Locations for Daily Newspapers\***

Q.40	2,014	N	2011	N	2008	N
NDM/City Zone	2	12	2	23	10	46
RTZ	0	2	6	3	2	8
Total	2	11	2	21	10	34

\* Hawkers based on newspapers that have Hawkers.

**Trend: Median Number of Street Hawker Locations for Sunday Newspaper\***

Q.40	NDM/City Zone					
	2014	N	2011	N	2008	N
NDM/City Zone	10	15	15	30	15	56
RTZ	3	2	5	8	4	11
Total	10	14	28	30	22	44

\* Hawkers based on newspapers that have Hawkers.

**41. Does your newspaper have employees and/or contractors that have dedicated retailer relationship/merchandise responsibilities?**

Yes  No

**Have Employees/Contractors with Dedicated Retailer/Merchandise Responsibilities**

Q.41	2014	N	2011	N	2008	N
<b>Industry</b>	<b>48</b>	<b>114</b>	<b>50</b>	<b>249</b>	<b>49</b>	<b>405</b>
25,000 and under	37	62	46	141	34	206
25,001-50,000	58	19	45	42	62	79
50,001-100,000	53	15	64	28	68	50
100,001+	72	18	61	31	68	63

**42a. As a percentage of the retail price, what is the average margin for single copy distributors/agents on a buy/sell agreement?**

Daily: \_\_\_\_\_% Sunday: \_\_\_\_\_%

**Trend: Margin for Single Copy Distributors/Agents on a Buy/Sell Agreement**

Q.42a	Daily						Sunday					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>20%</b>	<b>81</b>	<b>24%</b>	<b>176</b>	<b>26%</b>	<b>279</b>	<b>21%</b>	<b>74</b>	<b>24%</b>	<b>169</b>	<b>25%</b>	<b>255</b>
25,000 and under	19	38	20	88	20	118	20	31	24	80	24	98
25,001-50,000	18	15	20	36	24	62	20	15	21	36	23	59
50,001-100,000	20	14	29	24	32	41	21	14	28	25	33	41
100,001-200,000	23	8	33	20	31	31	28	8	29	20	24	30
200,001+	29	6	30	5	32	22	32	6	33	5	28	22

**42b. For distributors/agents on a fee basis, what is the average piece rate?**

Daily: \$ \_\_\_\_\_ Sunday: \$ \_\_\_\_\_

**Trend: Piece Rate for Distributors/Agents on a Fee Basis**

Q.42b	Daily						Sunday					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>\$0.21</b>	<b>54</b>	<b>\$0.15</b>	<b>84</b>	<b>\$0.17</b>	<b>134</b>	<b>\$0.33</b>	<b>51</b>	<b>\$0.31</b>	<b>83</b>	<b>\$0.35</b>	<b>116</b>
25,000 and under	0.22	20	0.16	38	0.32	56	0.40	17	0.32	36	0.58	42
25,001-50,000	0.22	10	0.14	16	0.19	22	0.27	10	0.37	16	0.46	21
50,001-100,000	0.16	10	0.18	10	0.12	21	0.33	10	0.45	11	0.25	21
100,001+	0.22	14	0.16	18	0.13	63	0.32	14	0.27	18	0.34	28

**43. Please provide the total number of:**

	<b>Employees</b>	<b>Independent Contractors (buy/sell relationships)</b>	<b>Independent Contractors (fee-based/agents)</b>
Single copy distributors	_____	_____	_____
Single copy hawkers	_____	_____	_____

**Trend: Median Number of Single Copy Distributors**

Q.43	Employees					
	2014	N	2011	N	2008	N
<b>Industry</b>	<b>4</b>	<b>107</b>	<b>2</b>	<b>39</b>	<b>5</b>	<b>72</b>
25,000 and under	2	52	1	21	3	39
25,001-50,000	6	19	4	7	6	14
50,001-100,000	4	16	16	4	5	6
100,001+	27	20	54	4	55	63

**Trend: Median Number of Single Copy Distributors**

Q.43	Independent contractors (buy/sell relationships)					
	2014	N	2011	N	2008	N
<b>Industry</b>	<b>14</b>	<b>107</b>	<b>14</b>	<b>151</b>	<b>15</b>	<b>228</b>
25,000 and under	6	52	7	70	10	89
25,001-50,000	23	19	18	31	13	48
50,001-100,000	14	16	24	24	18	43
100,001+	16	13	38	16	34	30
200,001+	27	7	40	7	60	18

**Trend: Median Number of Single Copy Distributors**

<b>Independent contractors (fee based/agents)</b>						
<b>Q.43</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
<b>Industry</b>	<b>12</b>	<b>107</b>	<b>9</b>	<b>104</b>	<b>8</b>	<b>151</b>
25,000 and under	8	52	6	61	6	82
25,001-50,000	11	19	17	15	9	25
50,001-100,000	17	16	11	11	18	20
100,001+	42	13	40	16	35	63

**Trend: Median Number of Single Copy Hawkers**

<b>Q.43</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
Employees	0	25	2	4	5	6
Independent contractors (buy/sell relationships)	5	25	1	35	4	59
Independent contractors (fee based/agents)	3	25	20	1	4	9

**44. Please provide the total number of:**

- a. Single copy newspapers per district manager: \_\_\_\_\_
- b. Single copy carriers per district manager: \_\_\_\_\_
- c. Single copy routes per district manager: \_\_\_\_\_

**Trend: Number Per District Manager**

<b>Q.44a,b,c</b>	<b>2014</b>	<b>N</b>	<b>2011</b>	<b>N</b>	<b>2008</b>	<b>N</b>
Single copy newspapers per district manager	1,815	73	1,824	135	2,193	216
Single copy carriers per district manager	8	73	9	131	8	202
Single copy routes per district manager	10	73	10	135	9	209

- d. How many employees are dedicated to single copy distribution (excluding personnel associated with transporting the newspapers to the distributors)?

Full-time \_\_\_\_\_ Part-time \_\_\_\_\_  
 (actual number of employees) (actual number of employees)

Total number of hours worked (all employees): \_\_\_\_\_ per week

Total number of FTEs \_\_\_\_\_

**Trend: Employees Dedicated to Single Copy Distribution**

Q.44d	Full-Time						Part-Time					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>1</b>	<b>105</b>	<b>1</b>	<b>221</b>	<b>1</b>	<b>321</b>	<b>0</b>	<b>101</b>	<b>0</b>	<b>188</b>	<b>1</b>	<b>270</b>
25,000 and under	1	53	1	125	1	143	0	51	0	110	0	121
25,001-50,000	1	19	2	39	2	65	1	19	1	27	1	58
50,001-100,000	2	16	2	26	3	47	0	15	1	24	1	36
100,001-200,000	2	11	4	21	6	34	0	10	0	19	1	32
200,001+	5	6	7	6	10	26	1	6	1	5	2	20

**Trend: Employees Dedicated to Single Copy Distribution**

Q.44d	# of hours worked						FTE's					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
<b>Industry</b>	<b>80</b>	<b>80</b>	<b>80</b>	<b>171</b>	<b>80</b>	<b>286</b>	<b>2</b>	<b>74</b>	<b>2</b>	<b>148</b>	<b>3</b>	<b>248</b>
25,000 and under	50	33	50	82	40	120	2	28	1	65	1	91
25,001-50,000	73	18	80	37	98	63	2	17	2	34	3	59
50,001-100,000	132	14	138	22	120	45	4	13	4	21	3	42
100,001-200,000	88	9	160	19	225	32	3	10	5	18	6	31
200,001+	150	6	250	7	360	22	6	6	6	7	10	22

**45. What is the turnover percentage for single copy distributors for the last 12 months?**

(To compute turnover, divide the number of distributors replaced annually by the number of routes.)

Single Copy Distributor turnover \_\_\_\_\_ %

**Trend: Turnover percentage for Single Copy Distributors**

Q.45	2011	N	2011	N	2008	N
<b>Industry</b>	<b>0%</b>	<b>104</b>	<b>7%</b>	<b>223</b>	<b>10%</b>	<b>296</b>
25,000 and under	0	56	2	127	1	133
25,001-50,000	0	19	10	37	12	63
50,001-100,000	3	14	12	27	20	42
100,001+	10	15	15	28	20	63

## SECTION VIII: Customer Service

### 46. Is your customer service function performed:

- In house                       Outside contractor  
 Regional call center       Combined with classified

**Trend: How Customer Service Function Is Performed**

Q.46	N			In House			Regional Call Center			Outside Contractor		
	2014	2011	2008	2014	2011	2008	2014	2011	2008	2014	2011	2008
	N	N										
<b>Industry</b>	<b>121</b>	<b>253</b>	<b>405</b>	<b>61</b>	<b>60%</b>	<b>68%</b>	<b>27</b>	<b>29%</b>	<b>13%</b>	<b>22</b>	<b>19%</b>	<b>9%</b>
25,000 and under	67	146	206	73	73	78	21	27	9	12	7	2
25,001-50,000	20	41	79	55	49	65	40	46	18	10	15	8
50,001-100,000	14	29	50	57	38	58	43	21	14	29	45	16
100,001-200,000	12	20	35	33	25	54	33	25	23	50	60	17
200,001+	4	10	28	25	50	36	13	-	11	75	50	50

### 46a. What is your daily average number of calls abandoned? \_\_\_\_\_

**Trend: Daily Number of Calls Abandoned**

Q.46a	2014	N	2011	N	2008	N
<b>Industry</b>	<b>10</b>	<b>106</b>	<b>8</b>	<b>189</b>	<b>10</b>	<b>285</b>
25,000 and under	4	56	3	98	3	118
25,001-50,000	11	18	10	32	8	57
50,001-100,000	23	15	17	29	15	48
100,001-200,000	71	10	40	19	30	31
200,001+	32	7	74	8	70	28

### 46b. What percentage of all of your calls are abandoned? \_\_\_\_\_ % of all calls

**Trend: % of all Calls Abandoned**

Q.46b	2014	N	2011	N	2008	N
<b>Industry</b>	<b>4%</b>	<b>107</b>	<b>3%</b>	<b>189</b>	<b>3%</b>	<b>289</b>
25,000 and under	3	56	1	96	2	116
25,001-50,000	5	16	3	33	3	62
50,001-100,000	5	15	4	28	3	47
100,001-200,000	5	12	4	20	3	33
200,001+	5	8	5	8	4	28



46c. What is your average speed of answer/delay of answer? \_\_\_\_\_ Seconds

Trend: Speed of Answer

Q.46c	2014		2011		2008	
	In seconds	N	In seconds	N	In seconds	N
Industry	12	84	20	163	20	282
25,000 and under	9	50	10	88	10	120
25,001-50,000	22	16	28	27	20	57
50,001-100,000	30	8	28	19	25	42
100,001-200,000	39	10	34	17	32	32
200,001+	32	6	24	7	35	27

47. Please provide the number of gross home delivery service complaints per 1,000 deliveries for the last 12 months. This is the gross number of customer complaints for any reasons for total home delivery circulation.

a. Daily: \_\_\_\_\_ per 1,000 deliveries (# of complaints)      b. Sunday: \_\_\_\_\_ per 1,000 deliveries (# of complaints)

Trend: Complaints Per 1,000 Deliveries

Q.47	Daily						Sunday					
	2014	N	2011	N	2008	N	2014	N	2011	N	2008	N
Industry	2.0	116	1.6	219	1.7	405	2.90	112	2.5	205	2.0	405
25,000 and under	1.9	62	1.4	122	1.3	206	1.90	58	2.0	111	1.0	206
25,001-50,000	1.9	19	1.8	36	1.8	79	2.4	19	3.0	35	2.7	79
50,001-100,000	1.9	16	1.7	28	2.0	50	3.9	16	3.0	26	3.0	50
100,001-200,000	2.5	12	2.0	19	1.9	35	3.8	12	4.0	19	3.3	35
200,001+	2.9	7	1.8	9	1.9	28	4.0	7	3.3	9	2.8	28

48. Do you credit for vacation stops?

Yes       No

Do you credit for vacation stops?

Q.48	2014		N
	Yes	No	
Industry	59%	41%	123
25,000 and under	73	27	66
25,001-50,000	63	37	19
50,001-100,000	41	59	17
100,001-200,000	15	85	13
200,001+	50	50	8

**49. Do you charge a setup fee for new accounts?**

Yes  No

Do you charge a setup fee for new accounts?			
Q.49	2014		N
	Yes	No	
<b>Industry</b>	<b>16%</b>	<b>84%</b>	<b>123</b>
25,000 and under	11	89	66
25,001-50,000	21	79	19
50,001-100,000	24	76	17
100,001-200,000	31	69	13
200,001+	13	87	8

**50. Do you guarantee a replacement paper within a certain period of time?**

Yes  No

Do you guarantee a replacement paper within a certain period of time?			
Q.50	2014		N
	Yes	No	
<b>Industry</b>	<b>74%</b>	<b>26%</b>	<b>123</b>
25,000 and under	74	26	66
25,001-50,000	84	16	19
50,001-100,000	59	41	17
100,001-200,000	85	15	13
200,001+	63	37	8



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