

# 2011 NAA Circulation Survey



**Newspaper  
Association  
of America®**

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

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

## **COMPLETE SURVEY AND WIN FREE HOTEL ACCOMODATIONS AND REGISTRATION!**



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

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

### THERE ARE SEVERAL OPTIONS FOR COMPLETING THIS SURVEY

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

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

- 2. By Mail to:** Clark, Martire & Bartolomeo, Inc.  
375 Sylvan Avenue  
Englewood Cliffs, NJ 07632

- 3. By Fax to:** (201) 568-9740

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

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

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

**SECTION I: CIRCULATION DATA TO BE OBTAINED FROM MOST RECENT PUBLISHER'S STATEMENT**

(Average Circulation)	5- Day (M-F)	Saturday	Sunday
<b>1A. PRINT</b>			
Home Delivery and mail			
Joint Distribution			
Single Copy Sales			
<b>Total Average Individually Paid Circulation</b>			
Group Subscriptions (Designated Employees)			
Hotel Distribution – Guest Refund			
Hotel Distribution – Room/Lobby Copies			
<b>Total Average Business/Traveler Paid Circulation</b>			
<b>Total Average Paid Circulation - Print</b>			
<b>VERIFIED CIRCULATION</b>			
Home Delivery – Requested			
Home Delivery – Targeted			
Total Average Home Delivery			
Educational copies			
University copies			
Employee/Independent Contractor			
Retail/Business			
Total Average Single Copy			
<b>Total Average Verified Circulation – Print</b>			
<b>TOTAL AVERAGE CIRCULATION – PRINT</b>			
<b>1B. DIGITAL REPLICA</b>			
<b>Paid Circulation</b>			
Subscription			
Single Issue			
<b>Total Average Paid – Digital Replica</b>			
<b>Verified Circulation: Opt-In</b>			
Subscription			
Single Issue			
Educational copies			
University copies			
Employee/Independent Contractor			
<b>Total Average Verified – Digital Replica</b>			
<b>Total Average Circulation – Digital Replica</b>			
<b>TOTAL AVERAGE CIRCULATION – PRINT &amp; Digital Replica</b>			
<b>1C DIGITAL NON-REPLICA</b>			
<b>Paid Circulation</b>			
Restricted Access Website			
eReaders with Advertising			
eReaders without Advertising			
Mobile			
<b>Total Average Paid Circulation – Digital Non-Replica</b>			
<b>TOTAL AVERAGE CIRCULATION: PRINT &amp; DIGITAL AND NON-REPLICA</b>			
<b>1D Brand Edition Print Paid</b>			
<b>1E Branded Edition Print Verified</b>			
Requested/Opt-in			
Targeted			
<b>1F Branded edition digital verified</b>			

---

## SECTION II: CIRCULATION REVENUE

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

- An expense   
 A reduction in revenue

2b. Please enter your newspaper's total circulation expenses for 2011. (Include transportation costs. Do not include mailroom or alternative delivery/TMC operations)

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

2c. Please enter your newspaper's estimated total circulation revenue for 2011

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

---

## SECTION III: HOME DELIVERY DISTRIBUTION MANAGEMENT

3. Have you stopped printing any days of the week in the past 12 months?

- Yes   
 No

4. IF YES – Which days of the week have you stopped printing?

- Monday Tuesday Wednesday  
Thursday Friday Saturday  
Sunday

5. 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 turns contracts with carriers? Which response best reflects the change at your newspaper?

<input type="checkbox"/>	Yes, but only in select geographic areas ( less than half of total circulation)
<input type="checkbox"/>	Yes, changed the distribution structure that eliminates district manager positions and the newspaper now contracts with fewer independent contractors that subcontract with carriers
<input type="checkbox"/>	No, we have retained the structure of the distribution function regardless of whether we have eliminated some positions

6. What is the average number of home-delivery subscribers?

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

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

	Daily	Saturday	Sunday
c. Porch	_____	_____	_____
d. Tube	_____	_____	_____
e. Driveway	_____	_____	_____
	100%	100%	100%

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

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

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

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

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

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

**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

**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:**

\_\_\_\_\_

**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 \_\_\_\_\_

**9f. Do you outsource home delivery, if so what percent? (Other than carriers contracted directly to the newspaper)**

\_\_\_\_\_ %  
 We don't outsource

**9g. Who do you use for outsourcing home delivery?**

- National Distribution Company
- Another Daily Newspaper
- Other

**10. As a percentage of retail subscription price, what is the average carrier margin?**

	Daily	Sunday
a. For home delivery	_____ %	_____ %
b. Piece rate for agents	\$ _____	\$ _____

**11. How much will you spend in 2011 on carrier route subsidies/allowances?**

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

**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 \_\_\_\_\_ %

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

- Yes
- No

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

Daily	Saturday	Sunday

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

Daily	Saturday	Sunday

**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.)***

- Phone books
- Product samples
- Catalogs
- Magazines: National
- Magazines: Local
- Other (specify) \_\_\_\_\_

**15a. Have you converted some or all of your distribution days to mail service (from carrier delivery) in your primary market?**

Yes

No

**IF YES IN 15a**

**15b. What days of the week have you converted to mail distribution (check all that apply)?**

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

**IF YES IN 15a**

**15c. What percentage of your total distribution does mail delivery account for?**

\_\_\_\_\_%

---

## SECTION IV: MARKETING

### 16a. Please estimate your newspaper's 2011 circulation marketing expenses in the following categories.

(To estimate 2011 totals, please use year-to-date actual expenses and estimate remaining months.)

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.

### 16b. Of all of your paid starts during the past 12 months, what percent were:

a. \_\_\_\_\_ Print only

b. \_\_\_\_\_ Print-digital combination

c. \_\_\_\_\_ Digital access/eReplica edition

d. \_\_\_\_\_ tablet apps

**17. Please estimate total new paid orders for 2011.**

*(To estimate 2011 totals, please use year-to-date, actual figures and estimate remaining months based on 2011 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

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

**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.

	Print Edition – may include a digital component		Digital Edition without print	
	Percent of annual home delivery sales sold by:	Average cost-per-order	Percent of annual home delivery sales sold by:	Average cost-per-order
a. Telemarketing	_____ %	\$ _____	_____ %	\$ _____
b. Carriers	_____ %	\$ _____	_____ %	\$ _____
c. Crew Sales	_____ %	\$ _____	_____ %	\$ _____
d. Direct Mail	_____ %	\$ _____	_____ %	\$ _____
e. Kiosks	_____ %	\$ _____	_____ %	\$ _____
f. Internet (Newspaper or 3 <sup>rd</sup> – party sites)	_____ %	\$ _____	_____ %	\$ _____
g. e-mail	_____ %	\$ _____	_____ %	\$ _____
h. District-Manager Sales	_____ %	\$ _____	_____ %	\$ _____
i. Single Copy & TMC Inserts/ FSI's	_____ %	\$ _____	_____ %	\$ _____
j. Voluntary	_____ %	\$ _____	_____ %	\$ _____
k. Other (Specify): _____	_____ %	\$ _____	_____ %	\$ _____
<b>l. TOTAL</b>	<b>100%</b>	<b>\$ _____</b>	<b>100%</b>	<b>\$ _____</b>

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

- Yes
- No

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

- Yes
- No  (Please skip to question 23)

**22. If yes, is the retention department:**

- In-house
- Outside
- Both

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

Yes

No  (Please skip to question 26) and complete the totals

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

	<b>13-week Retention Rate</b>	<b>26-week Retention Rate</b>	<b>52-week Retention Rate</b>
a. Telemarketing	_____%	_____%	_____%
b. Carriers	_____%	_____%	_____%
c. Crew Sales	_____%	_____%	_____%
d. Direct Mail	_____%	_____%	_____%
e. Kiosks	_____%	_____%	_____%
f. Internet (Newspaper or 3 <sup>rd</sup> – party sites)	_____%	_____%	_____%
g. e-mail	_____%	_____%	_____%
h. District-Manager Sales	_____%	_____%	_____%
i. Single Copy & TMC Inserts/ FSI's	_____%	_____%	_____%
j. Other (Specify):	_____%	_____%	_____%

**25. My new start retention rate total is:**

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

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

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

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

	<b>13-week Retention Rate</b>	<b>26-week Retention Rate</b>	<b>52-week 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): _____	_____%	_____%	_____%

**SECTION V: HOME DELIVERY**

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

- Yes   
 No  (Please skip to question 28b)

**28a. If yes, please indicate the discount given per period:**

	<b>% DISCOUNT</b>
3 months & Over	_____ %
6 months & Over	_____ %
12 months & Over	_____ %

**28b. Do you offer a lower subscription rate to subscribers for participating in a recurring 'easy pay' payment plan?**

- Yes   
 No  (Please skip to question 29)

**29. 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 Home Delivery Pay By Mail 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 e-mail (e-billing)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____ %	_____ %

**30. What percentage of your home delivery base is currently at a discounted rate?**

\_\_\_\_\_ %

**30a. What percentage of your new subscriptions are sold at a discounted rate?**

\_\_\_\_\_ %

**31. What is the average discount for new subscribers?**

\_\_\_\_\_ %  
 (As a percentage of basic rate price)

**32a. Have you outsourced your subscription billing?**

Yes   
 No

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

**32b. New Starts** 1-15 days 16-30 days 31-45 days 46-60 days 61-90 days 91 days or more

**32c. Renewals** 1-15 days 16-30 days 31-45 days 46-60 days 61-90 days 91 days or more

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

Subscriber characteristics or history? Subscription types?

**Original offer (rate, discount or source)?**

**32e. Do you have the capability to bill your subscribers by e-mail/ electronically?**

Yes   
 No

**32f. What percentage of your total subscribers pay the newspaper electronically?**

\_\_\_\_\_ %  
 Don't know/Not sure

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

Yes   
 No

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

Weekly   
 Monthly

**35a. Please record the basic 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.**

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

**35b. Print-Digital Combination** (Exclude tax paid by subscriber).

	<b>Bill weekly</b>	<b>Bill monthly</b>
<b>a. Daily and Sunday home delivery</b>	Price: \$_____ per week	Price: \$_____ per month
<b>b. Daily-only home delivery</b>	Price: \$_____ per week	Price: \$_____ per month
<b>c. Weekend-only (Sat/Sun) home delivery</b>	Price: \$_____ per week	Price: \$_____ per month
<b>d. Sunday-only home delivery</b>	Price: \$_____ per week	Price: \$_____ per month
<b>e. Other (Specify):</b>	Price: \$_____ per week	Price: \$_____ per month

**35c. Do you bill your digital-only product in weekly or monthly increments? Record the price of the basic subscription package**

	<b>Paid Subscription Price for Digital Only</b>
<input type="checkbox"/> Weekly	\$ _____
<input type="checkbox"/> Monthly	\$ _____

**SECTION VI: SINGLE COPY OPERATIONS**

36. Please list the prices offered by your newspaper.

36a. Weekday single copy Daily price: \$ \_\_\_\_\_

36b. Weekday single-copy premium day(s) Daily price: \$ \_\_\_\_\_

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

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

36d. Sunday single-copy Sunday price: \$ \_\_\_\_\_

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

Yes, Thanksgiving

Yes, other holidays (which ones?)   
\_\_\_\_\_

No

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

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

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

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

39. Approximately what percentage of total SINGLE-COPY sales are sold through:

	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): _____	_____ %	_____ %	_____	_____	_____	_____
TOTAL:	_____ %	_____ %	_____	_____	_____	_____

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

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

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

Yes   
 No

**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: \_\_\_\_\_%

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

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

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

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

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

**44a. Single copy newspapers per district manager:** \_\_\_\_\_

**44b. Single copy carriers per district manager:** \_\_\_\_\_

**44c. Single copy routes per district manager:** \_\_\_\_\_

**44d. How many employees are dedicated to single copy distribution (excluding personnel associated with transporting the newspapers to the distributors)?**

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

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

Total number of FTE's \_\_\_\_\_

**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 \_\_\_\_\_%

