



GNI Subscriptions Lab Key Learnings & Experiments

Inaugural Meeting: America's Newspapers

October 2019

Google News Initiative





The Google News Initiative

Google's effort to build a **stronger future for journalism**

**Elevate and strengthen
quality journalism**

- Trust & Credibility

**Evolve business
models to drive
sustainable growth**

- **Consumer Revenue**
- Local
- Advertising

**Empower news orgs
through technological
innovation**

- Audio, Video & New Formats
- Data

The Digital Sub Lab

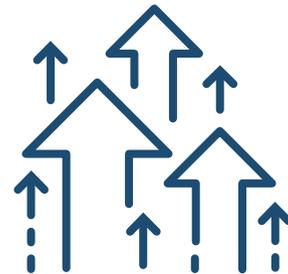
WITH 10 NEWSPAPER PUBLISHERS WE LOOKED AT THE ENTIRE

PATH TO SUBSCRIPTION



Discovery

Reach new audiences



Conversion

Grow and diversify revenue streams



Retention

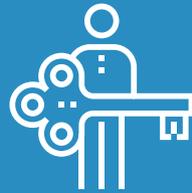
Build loyalty for existing subscribers

Publisher Commitments to Participate



Digital subscriptions is a strategic priority

- Digital subscriptions is a **top 3 corporate priority**
- Launched a digital subscriptions business; seeing growth



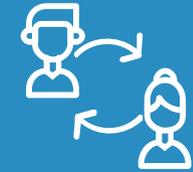
Senior management is bought in

- Senior executive participation
- CEO or proxy participates in the lab project



'Skin in the game' operationally

- Assigned a project lead, and working team across key functions
- Commitment to **testing and iteration** during 'on-site' phase
- Agreed to share necessary data, participate in benchmarking



Willingness to share knowledge with ecosystem

- Agreed to fully participate in cohort activities, off-site workshops
- Agreed to **contribute to playbook, appear in case studies**, etc.

5 Components for Success

Strategic Direction

1

Understand “what you’re solving for” as a publisher

- Frame the long-term business model & develop the business case

Organizational Alignment

2

Resolve print vs. digital and advertising vs. consumer tension

- Set strategic priorities & invest in people, process, and technology

Leveraging Data & Analytics

3

Track KPIs along the customer journey & compare to benchmarks

- Publishers are at different levels of data & analytics capabilities

Experimentation Mindset

4

Embed a bias towards action to test strategies

- Develop hypotheses, measure, and adjust tactics

Prioritize Focus Areas

5

Prioritize focus areas based on short- and long-term

- Track progress and refine based on experiment findings

5 Key Learnings

1

Gaps Bigger Than Expected

Publishers remain highly print-centric

- Cohort primarily in less advanced digital maturity curve stages

2

Data Request List First Test of Digital Maturity

Reflects tracking, testing, modeling, etc. capabilities

- Began Subs Lab with extensive data request list
- However, able to see results quickly (i.e. Charleston)

3

Progress Occurs Quicker Than Expected

Small tactical changes lead to significant subscriber growth

- Ex: Newsletter modal, PayPal, tighter meter, onboarding emails

4

Publishers Able To Do More With Less

Requires asking the correct questions and creative workarounds

- “We can’t do that.” became “We made it happen!” (i.e. Portland)

5

Market Sizing Projects Sustainable Revenue

Projections at a multiple of newsroom expense required to sustain the business model long-term

- Digital subscriptions revenue often higher than expected

Charleston Post and Courier GNI Subscriptions Lab

Key learnings and experiments

October 2019

Focus area 1: Applying Benchmarking to Daily Operations

It was tough to prioritize what we should focus on with so many different metrics

We had limited visibility into customer outcomes

Benchmarking and Metrics are Critical



Applying Benchmarking to Daily Operations

Goal

–Refine benchmarks to guide decision making and prioritize roadmap items

What Changed?

–Started tracking monthly benchmarks and comparing to target
–Included in Roadmap

Results

–Understand how tactics drive results
–Clearer picture of gaps and weaknesses
–Tighter focus on key target areas like tech stack, user experience, newsletters and marketing

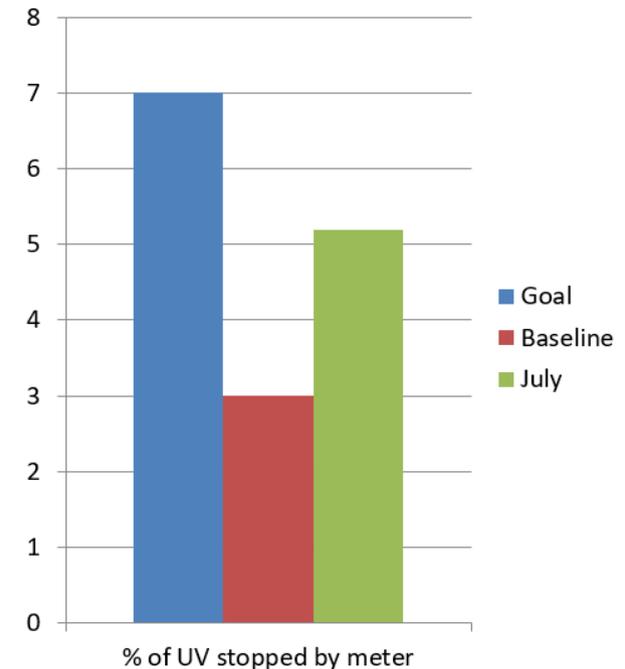
Meter Stop Rate

COMPLETED

- Switched from monthly meter to weekly meter with meter showing on every view to expose more readers to meter
- Tightened meter for Fanatics and Enthusiasts while leaving meter looser for Fly-Bys and Dabblers

ROADMAP

- Currently re-testing monthly meter versus weekly meter for Fanatics
- Tightened meter for Fanatics and Enthusiasts remains
- Test 45-day meter versus monthly meter for Fanatics or Fanatics/Enthusiasts



Focusing on the Right Metrics Accelerates Progress

Metric	Progress	Completed	Roadmap
Visit Frequency	Target: 2.0 Baseline: 1.60 July: 1.65	<ul style="list-style-type: none">— Push alerts— Newsletter content, signups— Metadata— Page load speed— Social distribution strategy	<ul style="list-style-type: none">— Newsroom metrics— Sub-only newsletter— Browser alerts— Visit-focused marketing campaign
Effective ARPU	Target: \$20.00 Baseline: \$7.77 July: \$10.31	<ul style="list-style-type: none">— Pricing experiments— Increase existing subscribers	<ul style="list-style-type: none">— Focus value prop. on messaging & incentives— Print activation plan
Emails Per UV	Target: 10.0% Baseline: 3.6% July: 5.6%	<ul style="list-style-type: none">— Additional newsletters— More user friendly— Home page signup widgets— Social signup campaign	<ul style="list-style-type: none">— Opt-in print subscribers— Auto-fill email— Expand marketing to encourage quality newsletter subs

Focus area 2: A Testing Mindset is Essential

We tended to talk about things and try to craft the perfect solution

Now we brainstorm a test, try and learn...

Locking Content

TEST: Using locked content to drive subscribers and lead generation

TARGET: 10,000 new registrations or 2x direct conversion from articles

DURATION: Launching Oct. 9th and run for consecutive two week tests



Unlock Article w/ Email (Oct. 9th – 23rd)

—Non-subscribers may be more willing to **exchange information (i.e. email) for the ability to unlock** premium content

—Acts as combined lead generation and pay model

THEN ►

Premium Content (Oct. 24th – Nov. 8th)

—Non-subscribers may be more willing to pay for content if they understand that **content is premium and unique**

—Currently, the Post & Courier only has a monthly, metered model



Baltimore Sun GNI Subscriptions Lab

Key learnings and experiments

October 2019

Focus area 1: Paywall performance

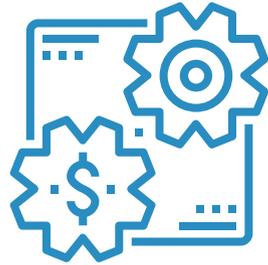
Almost half of Baltimore starts currently come from paywall

With a one-size-fits-all meter of 2 articles per 30 calendar days, meter stop rate is now at $\sim 3.5\%$

Aspired meter stop rate $>5\%$

Paywall Performance: key roadmap items to tackle

Dynamic paywall



Idea: after “listening” to our readers’ behavior on our sites, an AI-powered system places users into segments based on:

- ▶ Propensity to convert
- ▶ Preferred type of content
- ▶ Consumption pattern

Implementation: Tailored paywall experience for different segments:

- ▶ Meter limit
- ▶ Offers
- ▶ Product offerings
- ▶ Messaging on paywall

Goal: increase MSR and PSCR

Results: WIP

Paywall Performance: key roadmap items to tackle

Rolling meter:



Idea: Test our 30-day Calendar meter against a Rolling meter

- ▶ “Lookback” instead of “reset” approach
- ▶ Individual for every user

Hypotheses:

- ▶ More paywall hits
- ▶ No content rationing
- ▶ Possibility to extend our meter beyond 30 days in the future

Goal: increase MSR and PSCR

Results: WIP

Focus area 2: Lead generation

- Less than 6% of Baltimore Sun users are “known”
- “Known” users convert 10 X better than anonymous
- Value of an email record has tripled since 2016
- Target rate of “known” users >10%

Lead Generation: key roadmap items to tackle

On-entrance email capture:



Current state: 80% of emails captured through newsletter promotion, served when a user is about to leave the site

Idea: serve an on-entrance overlay on a user's 1st article view of the month, capturing 100% of eligible audience

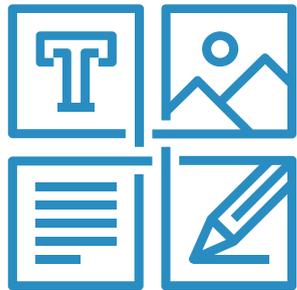
Results: a test showed 40% lift in email submit rate compared to existing approach, paired with a not-as-significant PV loss

Next steps:

- ▶ Roll-out to a bigger portion of the audience;
- ▶ Test various design/creative approaches

Lead Generation: key roadmap items to tackle

New ways to promote newsletters



Idea: explore currently untapped opportunities to use organic assets for email capture/newsletter promotion:

- ▶ AMP pages;
- ▶ Within articles after X paragraphs;
- ▶ By leveraging assets currently used for other marketing purposes
- ▶ By targeting dynamic segments to promote newsletters among certain user segments.

Results: WIP

Experiments from Other Publishers



Experiments from Other Publishers

Publisher	Experiments	Results / Insights
	<ul style="list-style-type: none">– Added 1st article newsletter modal– Added credit card expiration updater	<ul style="list-style-type: none">– Increased newsletter subs by 140%+– Reduced declined cards by 19%
	<ul style="list-style-type: none">– Added hard registration wall on 2nd article, hardwall on 5th article (reduced to 0 → 5)	<ul style="list-style-type: none">– Added 62,000 registrations YTD in Columbus– Increased meter impressions, starts, activations
	<ul style="list-style-type: none">– Added premium hardlocking strategy– Closed Opinion and Social referral exclusions	<ul style="list-style-type: none">– 22% of conversions from premium content– High traffic doesn't necessarily drive conversions
	<ul style="list-style-type: none">– Added soft registration wall for incognito– Planning hard registration wall, newsletter signup, & newsletter onboarding journey	<ul style="list-style-type: none">– Added 8,500 email registration, 3,100 newsletter subscribers from incognito wall

Experiments ²

Publisher

Experiments

Results / Insights



— Added four-week Welcome series for onboarding new subscribers

— **Increased two-month retention rate by 21%**



— Redesigned landing page, reduced to 3 options
— Added PayPal checkout option

— **Increased total starts by 135% YoY**



— Added newsletter widget, increased sends volume
— Increased article recirculation widgets
— Redesigned landing page to promote digital-only

— **Increased newsletter sends by 65%**
— Increased open rate by 115%
— Increased click-through rate by 124%



— Promote annual-term subscriptions, instead of typical month-to-month

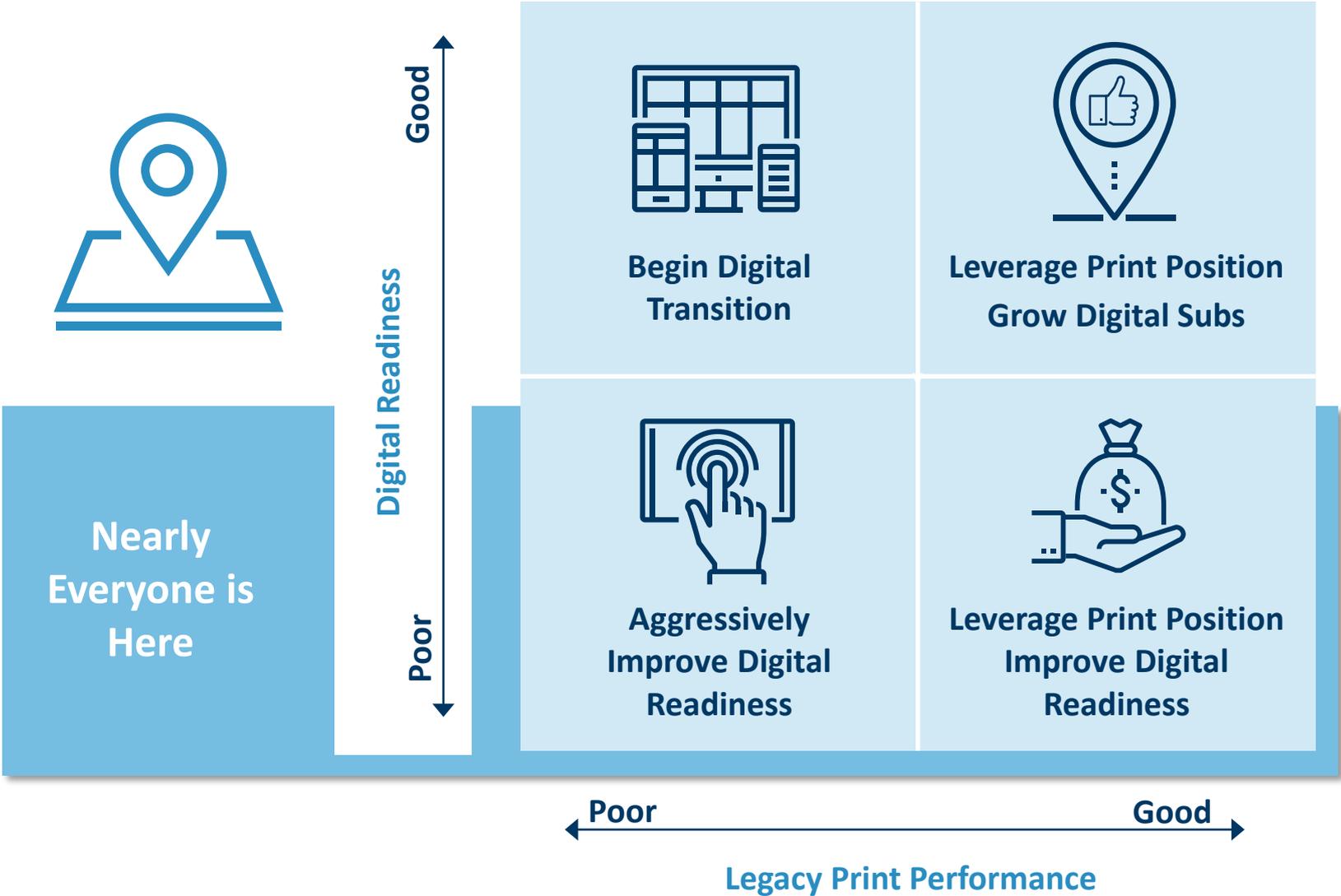
— Monthly customers churn is 2x than annual
— Monthly LTV is \$121 compared to \$140 for annual



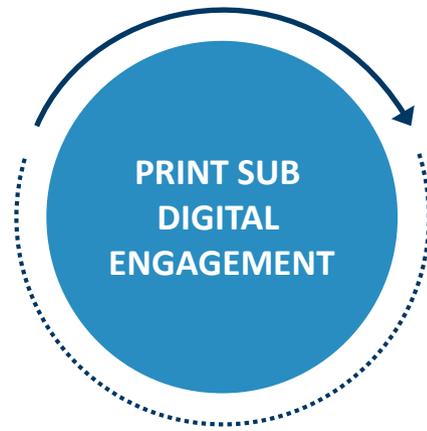
Beyond Growing Digital Subs are we Thinking about Digital Readiness

October 2019

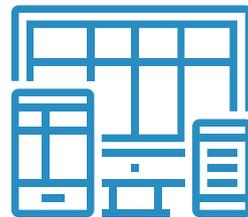
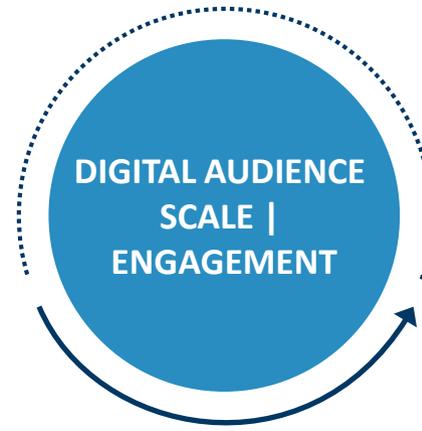
Where are you Today?



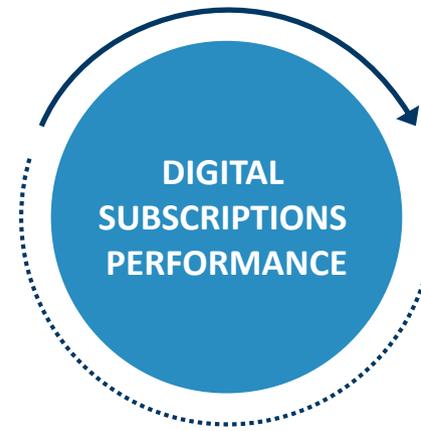
What is your Digital Readiness?



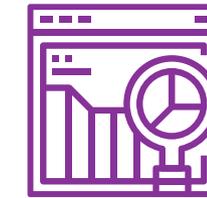
One-time
Conversion When
Print Stops



Top of Funnel and
Visitor Audience
Propensity to
Subscribe



Progress of Digital
Sub Volume and
ARPU



Strengths and
Gaps to Improve
Readiness

Thank You
Q&A