



# GNI Subscriptions Lab Key Learnings & Experiments

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Inaugural Meeting: America's Newspapers

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October 2019

**Google** News Initiative





# The Google News Initiative

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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

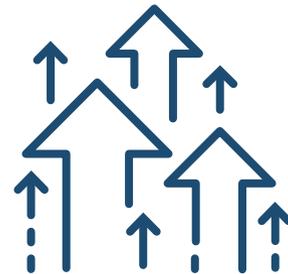
WITH 10 NEWSPAPER PUBLISHERS WE LOOKED AT THE ENTIRE

## PATH TO SUBSCRIPTION



**Discovery**

Reach new audiences



**Conversion**

Grow and diversify revenue streams



**Retention**

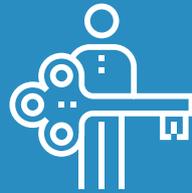
Build loyalty for existing subscribers

# 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



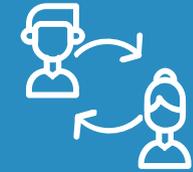
## Senior management is bought in

- 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

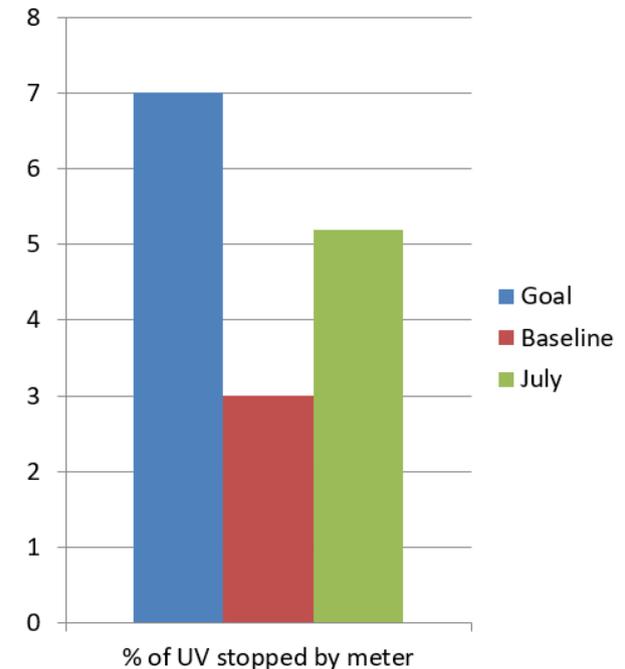
#### Meter Stop Rate

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

## 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. 9<sup>th</sup> and run for consecutive two week tests



## Unlock Article w/ Email (Oct. 9<sup>th</sup> – 23<sup>rd</sup>)

—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. 24<sup>th</sup> – Nov. 8<sup>th</sup>)

—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

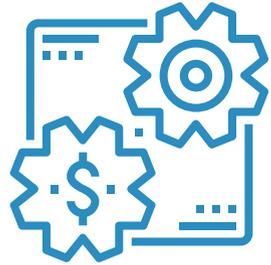
Almost half of Baltimore starts currently come from paywall

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:



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

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

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**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

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

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

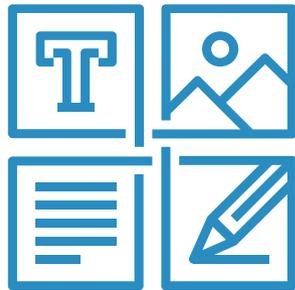
Next steps:

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

# Lead Generation: key roadmap items to tackle

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## 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.

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Results: WIP

# Experiments from Other Publishers

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# Experiments from Other Publishers

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

# Experiments <sup>2</sup>

## 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

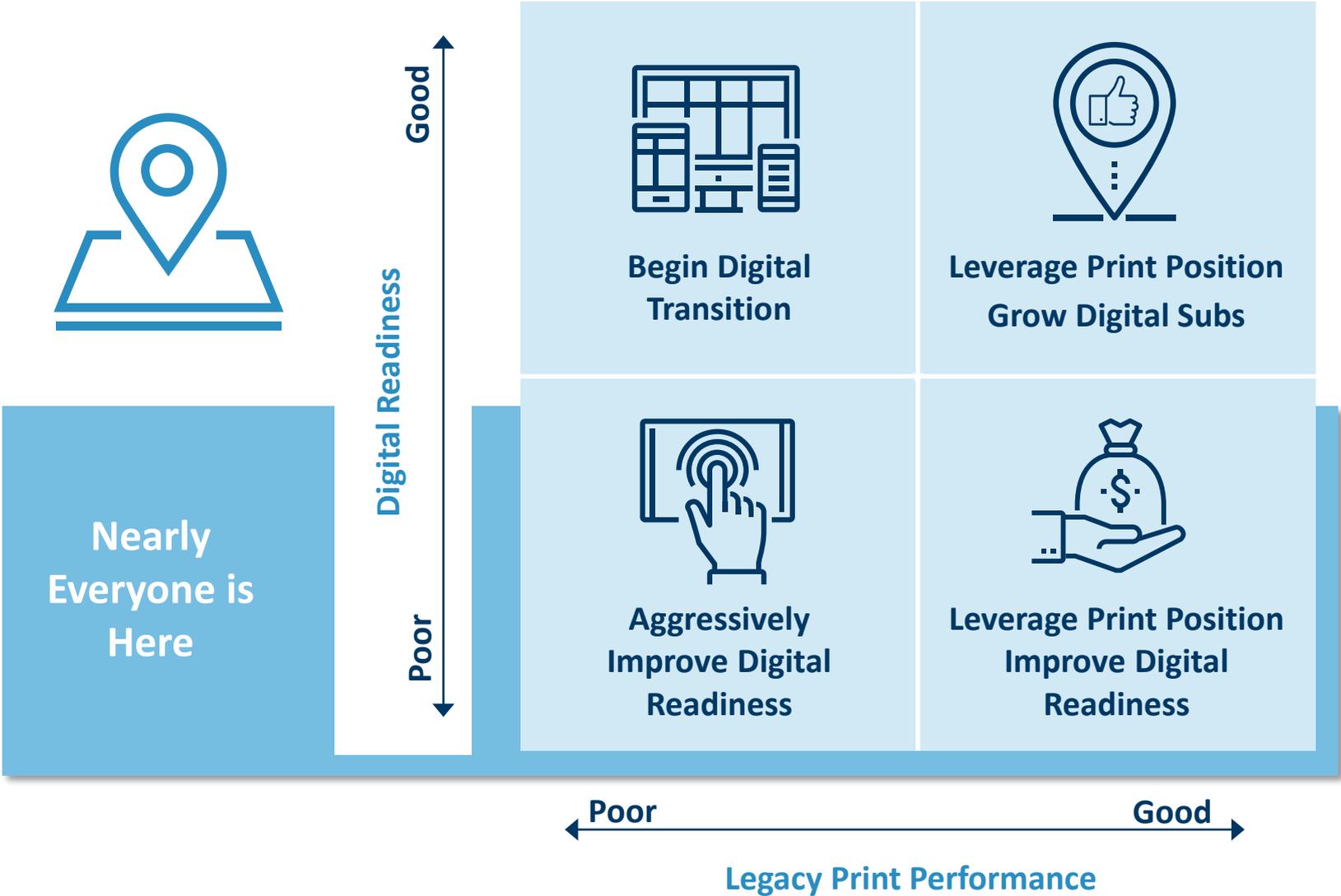
— Monthly customers churn is 2x than annual  
— Monthly LTV is \$121 compared to \$140 for annual



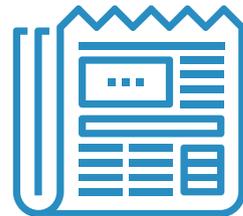
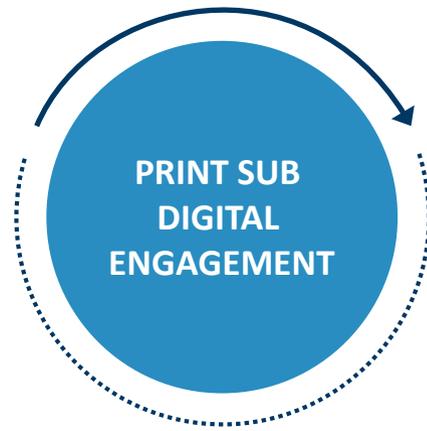
# **Beyond Growing Digital Subs are we Thinking about Digital Readiness**

October 2019

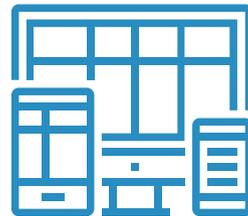
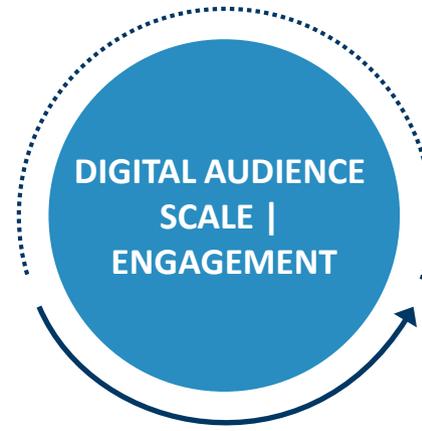
# Where are you Today?



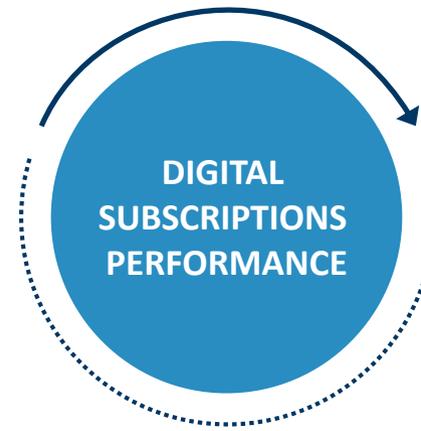
# What is your Digital Readiness?



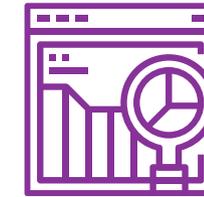
One-time  
Conversion When  
Print Stops



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