

The Washington Post

Digital Subscriptions Strategy

Industry Indicators



Industry Indicators

News Consumption Habits Are Changing

50%+

Of Consumers Use Social Media
to Consume News

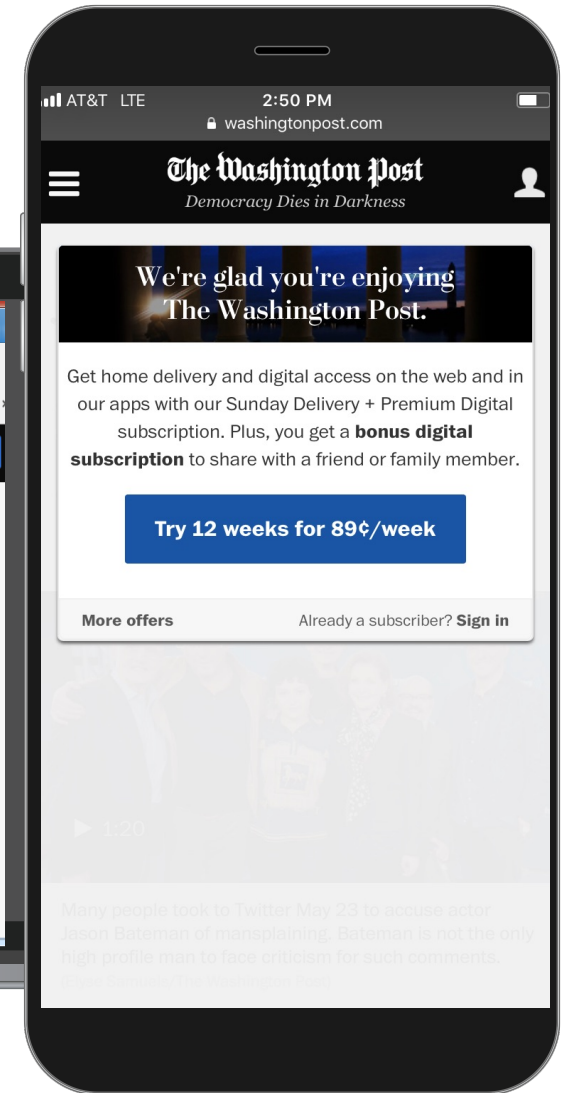
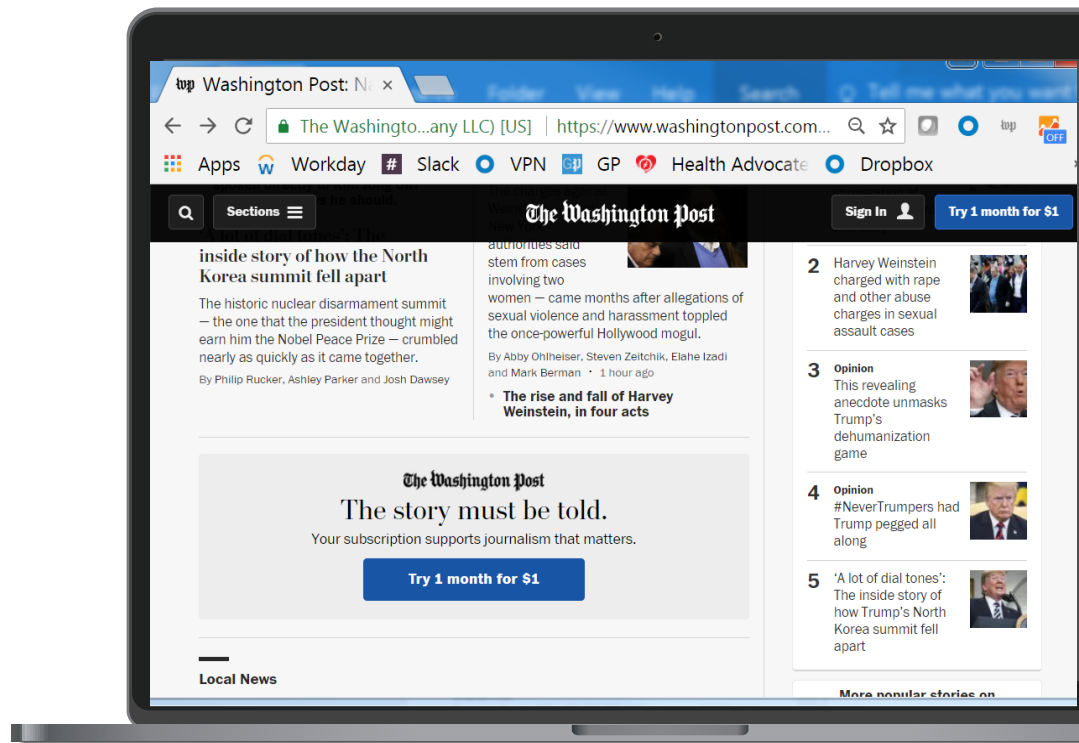


Source: 2017 Reuters Institute Digital News Report



Industry Indicators

The Future of News

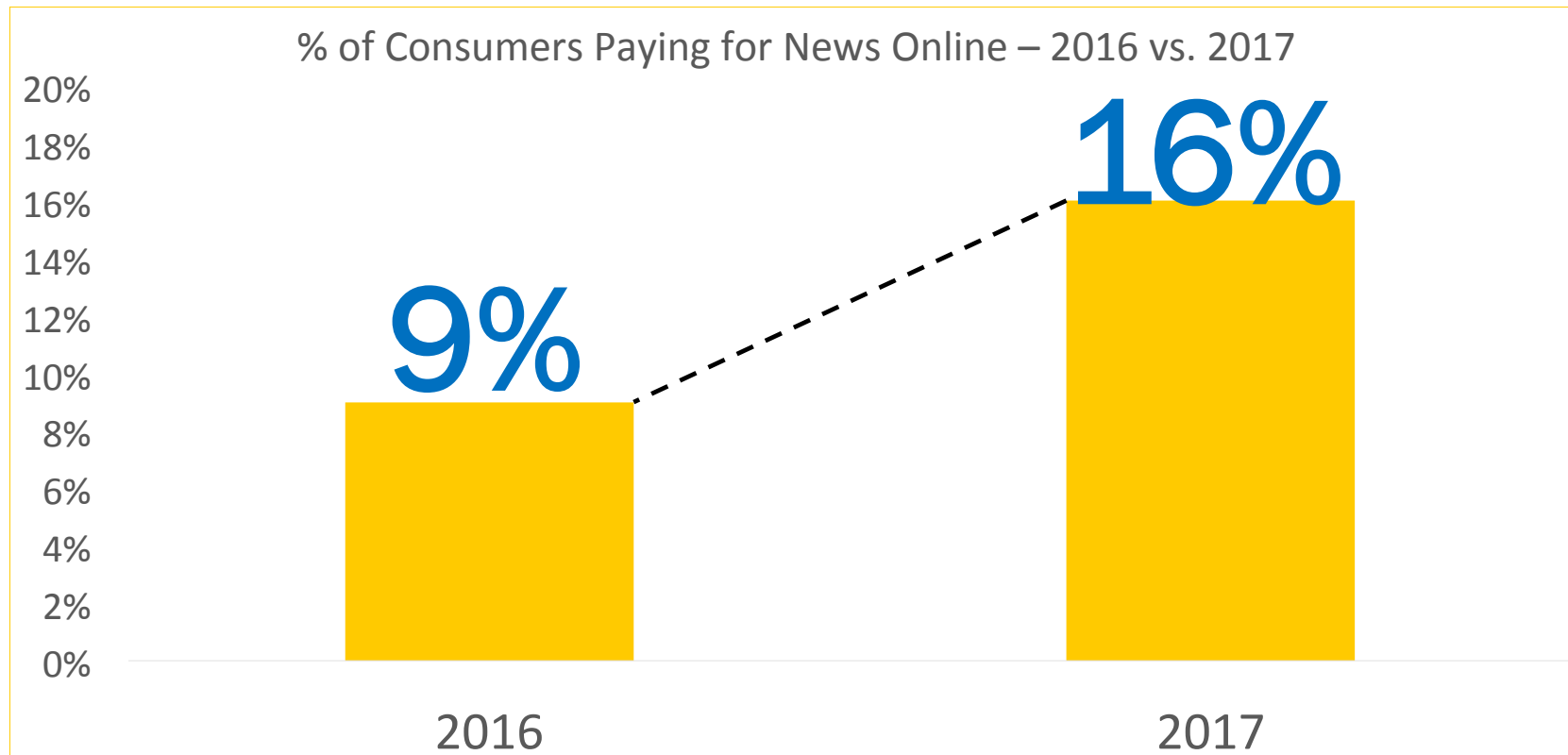




Industry Indicators

Consumers Are Paying For **Quality** Content

THE PERCENT OF U.S. CONSUMERS WILLING TO PAY FOR NEWS IS UP 7%

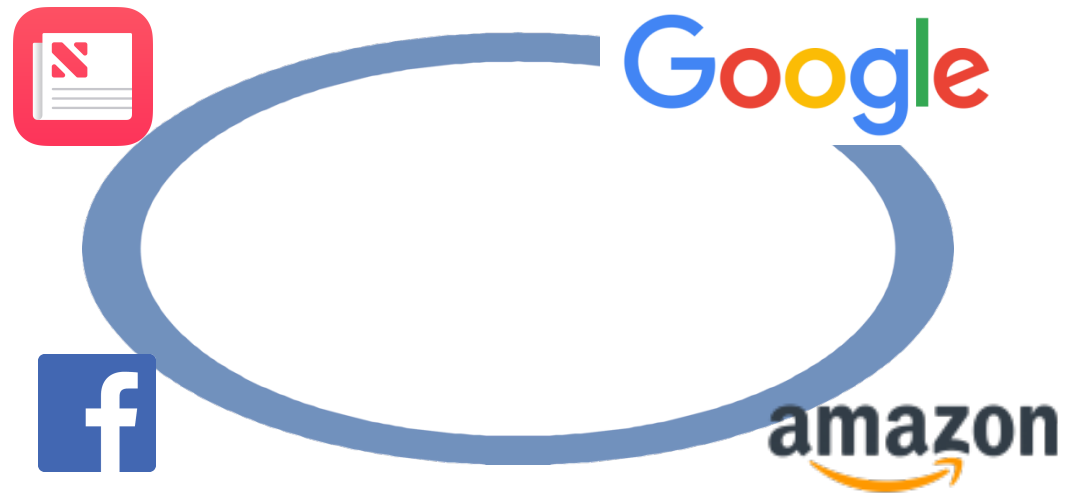


Source: 2017 Reuters Institute Digital News Report



Industry Indicators

Third Party Partners






Traffic

Washington Post Traffic

88M
2018 AVG. UNIQUE VISITORS
PER MONTH


84%
SINCE JAN 2015



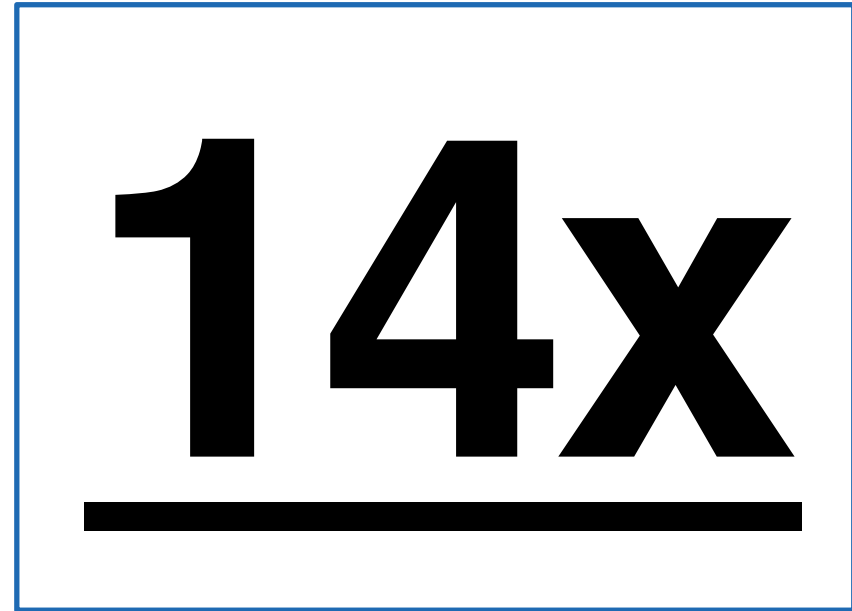
Traffic

Monthly Pageviews per Visitor

[CELLRANGE]



Subscribers



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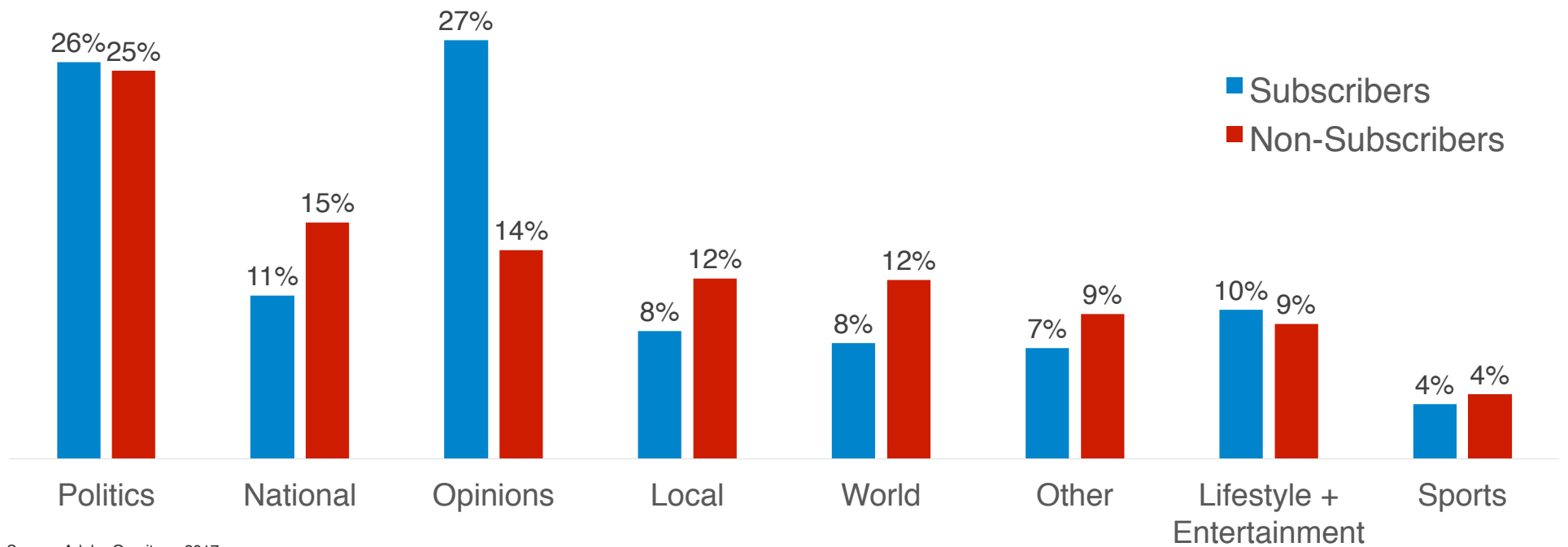
Non-Subscribers



Content Read By Subscribers

SUBSCRIBERS OVER-INDEX ON OPINIONS CONTENT

Percentage of 2017 Pageviews by Section



Source: Adobe Omniture, 2017

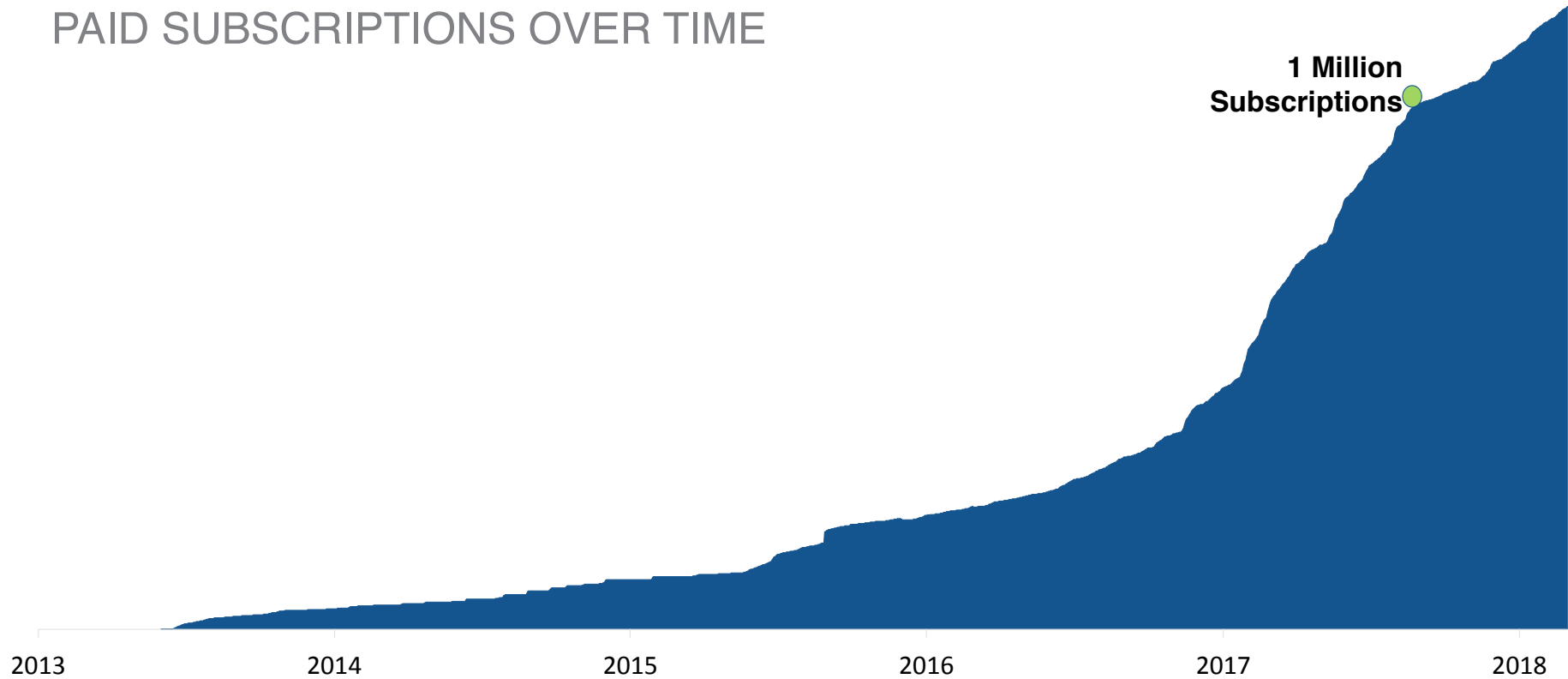


The Washington Post Digital Subscriptions Growth



Digital Subscriptions Growth

PAID SUBSCRIPTIONS OVER TIME

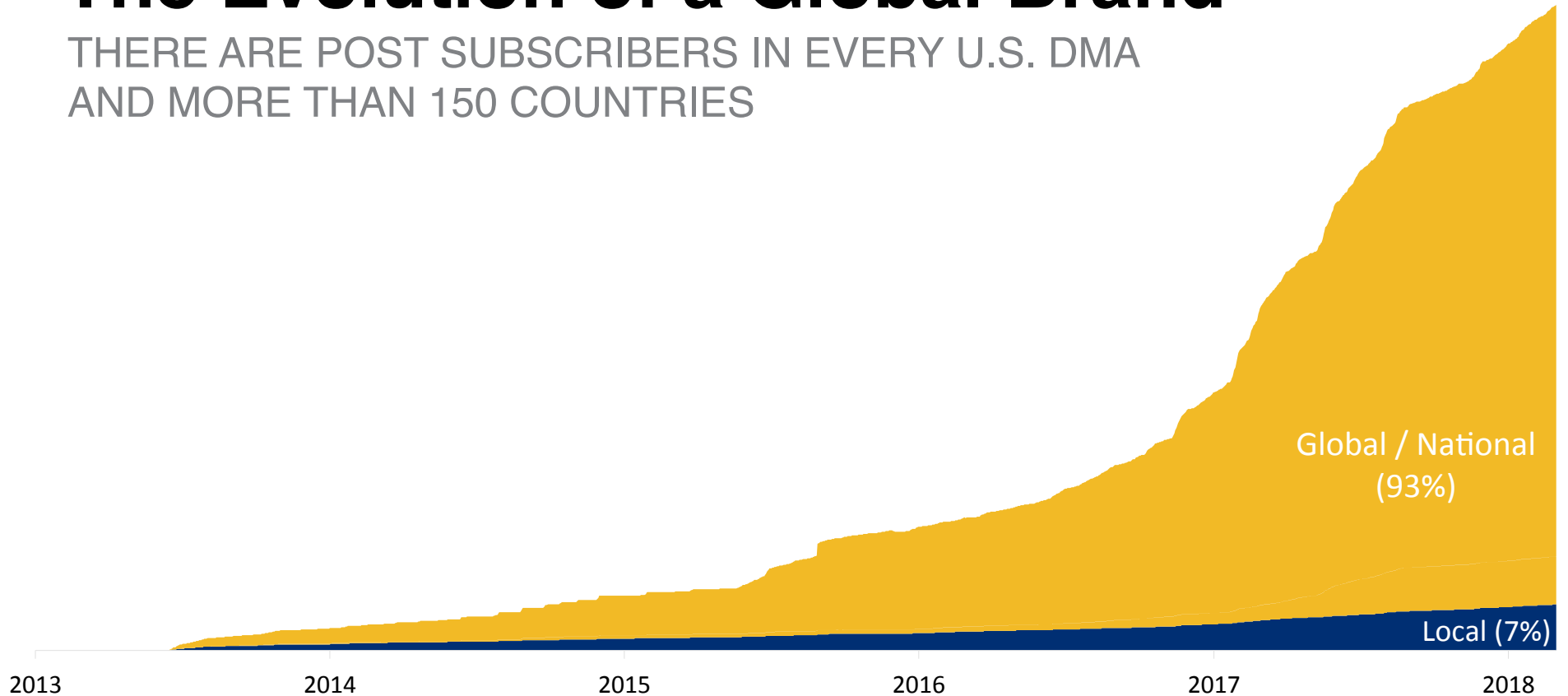


Source: The Washington Post Digital Subscriber Database



The Evolution of a Global Brand

THERE ARE POST SUBSCRIBERS IN EVERY U.S. DMA
AND MORE THAN 150 COUNTRIES



Source: The Washington Post Digital Subscriber Database

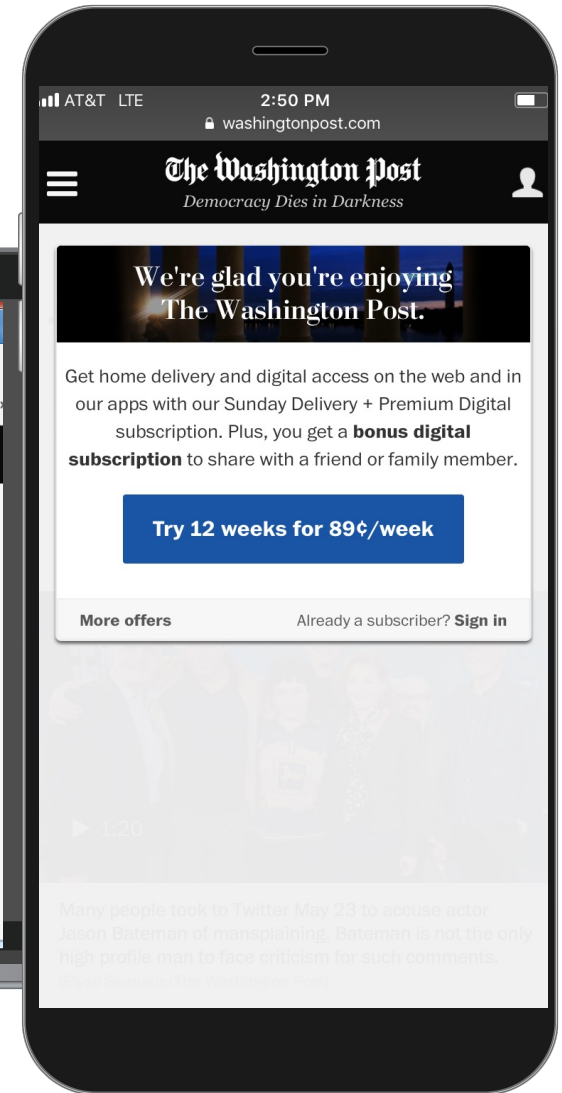
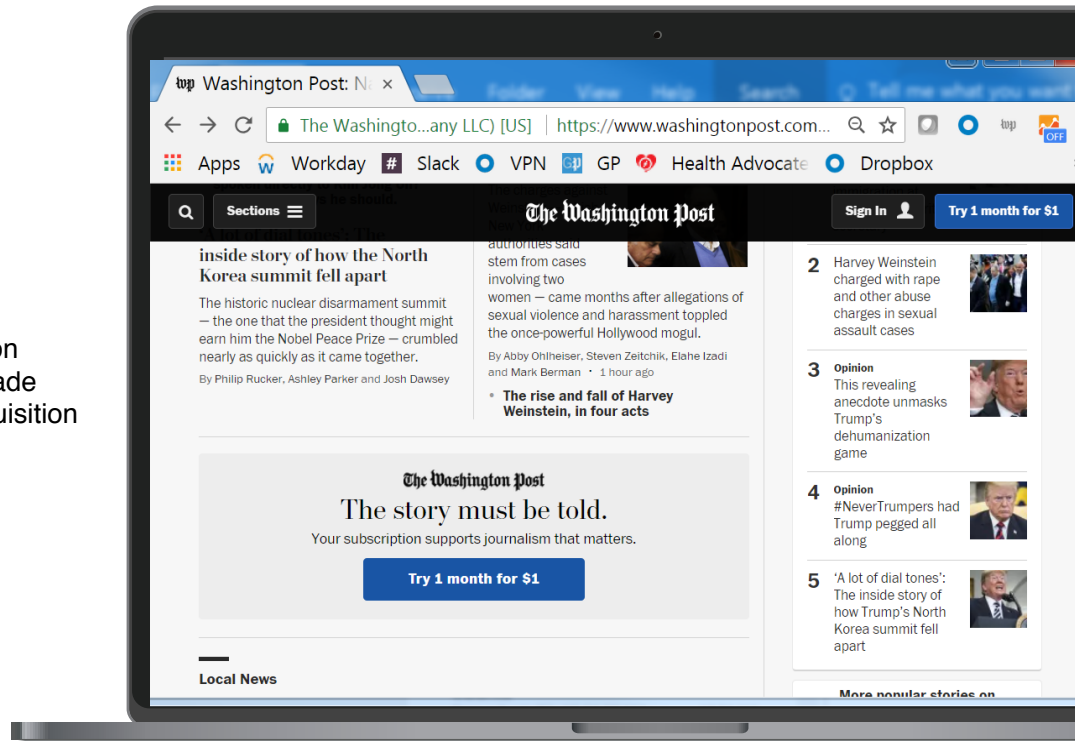


Top Driver: Onsite Acquisition

58%

Of 2018 subscription purchases were made through onsite acquisition channels like:

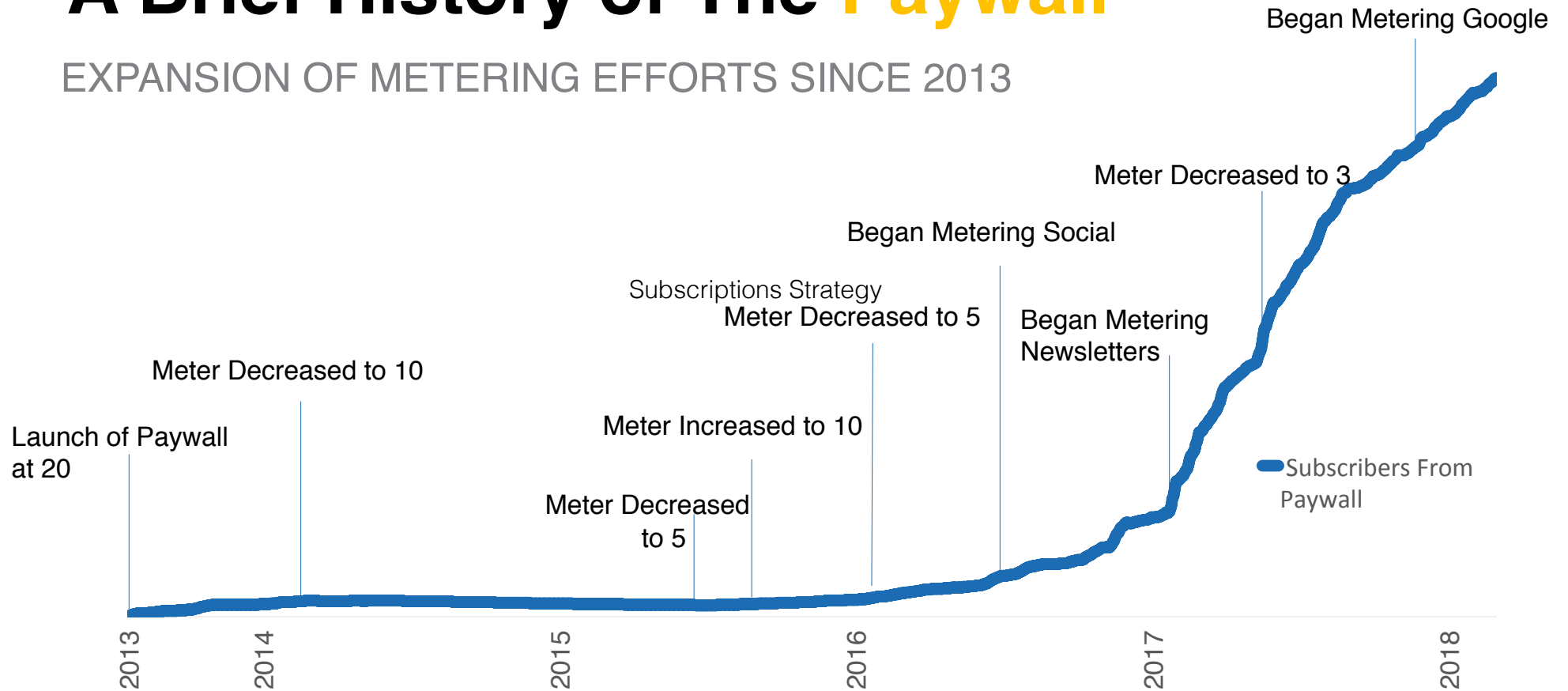
- Ads
- Paywalls
- Site buttons





A Brief History of The Paywall

EXPANSION OF METERING EFFORTS SINCE 2013



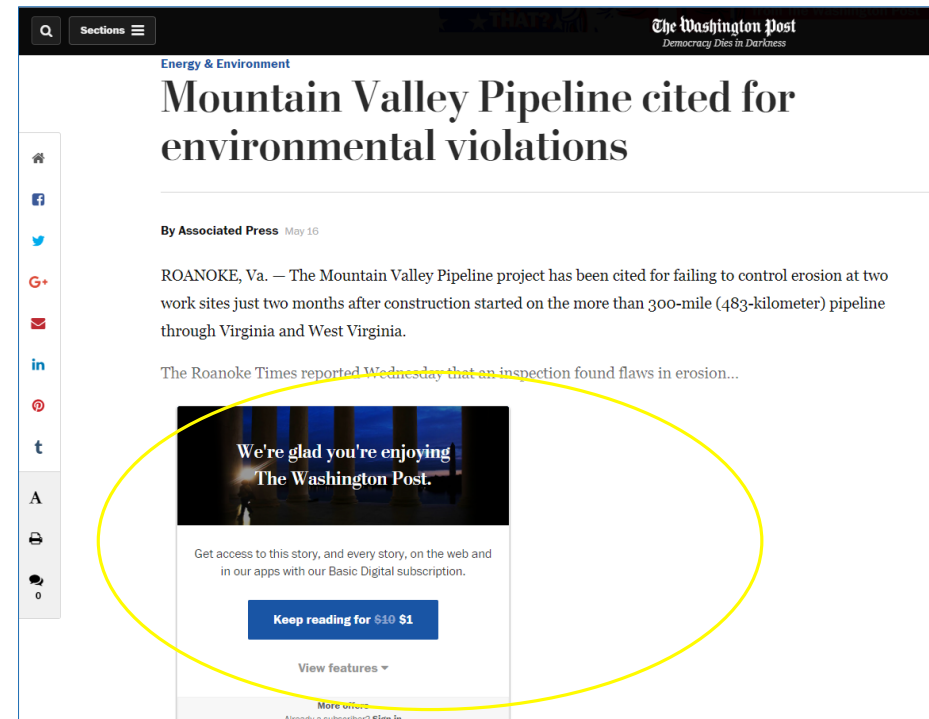
Source: The Washington Post Digital Subscriber Database



Paywall Testing In 2017

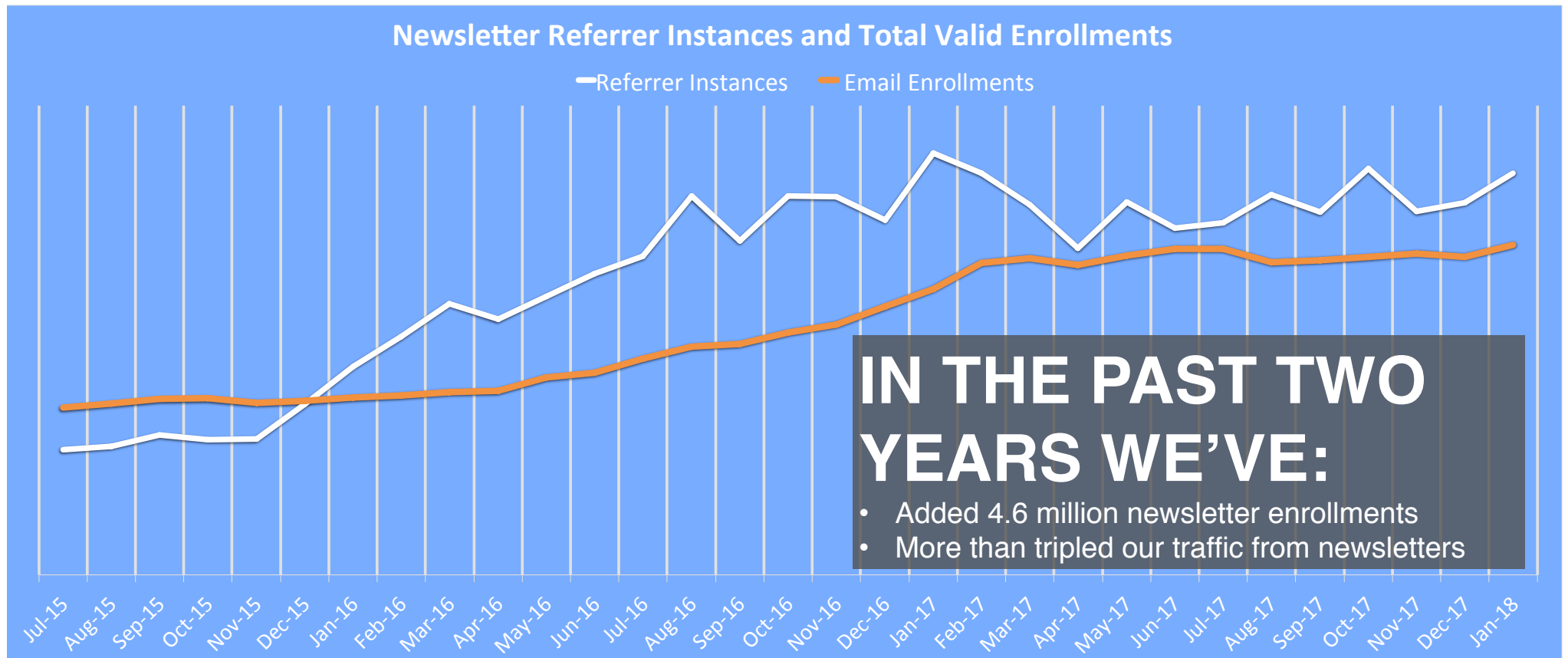
FIRM ANALYSTS RAMPED UP SUBSCRIPTION TESTING EFFORTS

- Meter Tightening Tests
- Testing Subscription Models on 3rd Party Platforms
- Teaser Paywall Test





Off-site: Newsletters Driving Lead Generation



Special Offers for Key Segments



Key Segments

Special Offers for Key Segments

THROUGH IP WHITELISTING AND FREE SUBSCRIPTION OFFERS

Discounted Subscription Offers For:

- Higher Education
- K-12 Education
- Print Publication Partners

The Washington Post
Democracy Dies in Darkness

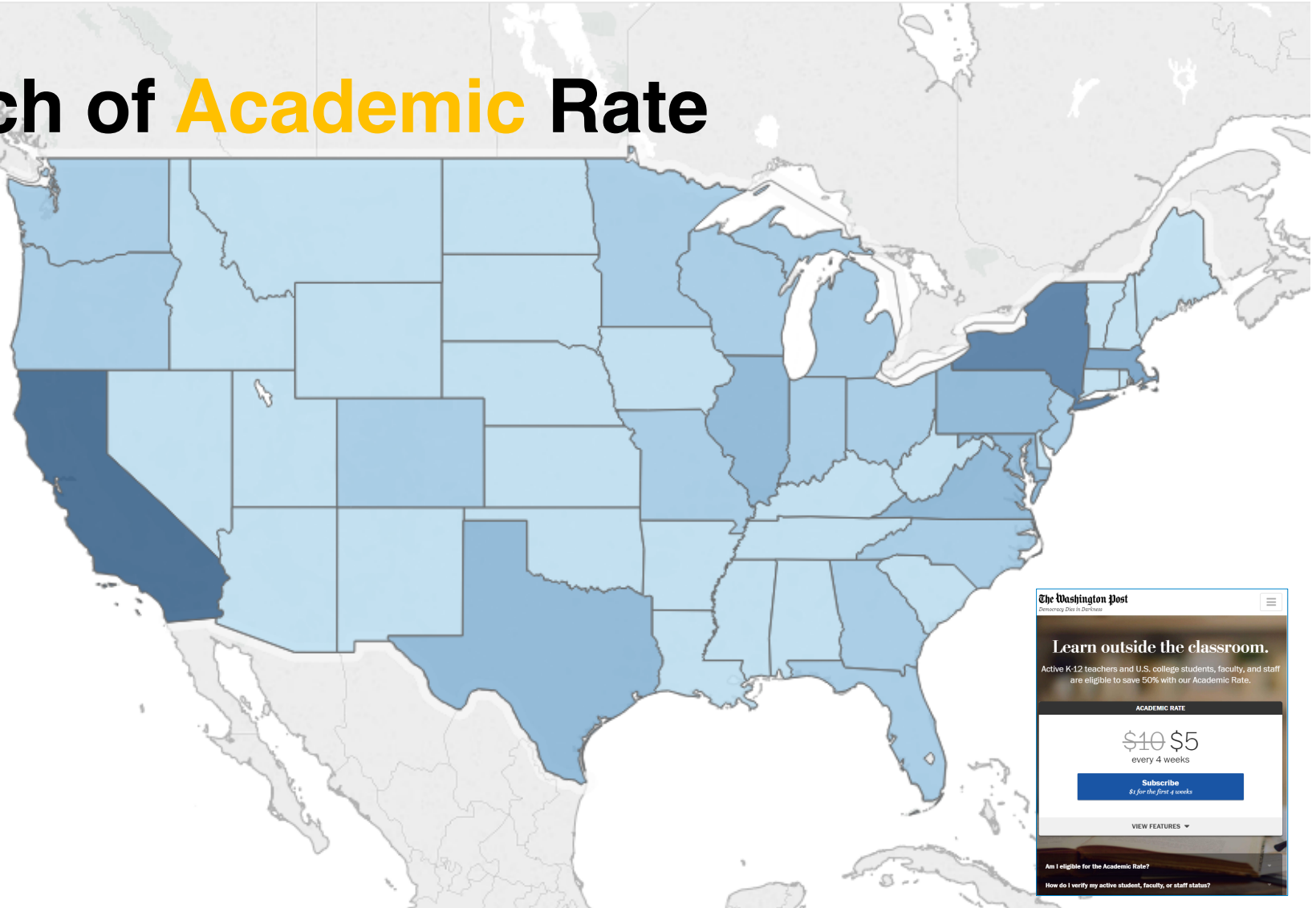
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Key Segments

Launch of Academic Rate



The Washington Post
Democracy Dies in Darkness

Learn outside the classroom.

Active K-12 teachers and U.S. college students, faculty, and staff are eligible to save 50% with our Academic Rate.

ACADEMIC RATE

\$10 \$5
every 4 weeks

Subscribe
\$5 for the first 4 weeks

[VIEW FEATURES](#)

Am I eligible for the Academic Rate?
How do I verify my active student, faculty, or staff status?

Pricing and Transaction Strategy



3 Years Ago



Today



Pricing Strategy and
Transactions

Price Testing

TESTING HELPED DEFINE 2018 PRICE STRATEGY

Annual Price Testing

Introductory Rate Testing

Local Currency Test

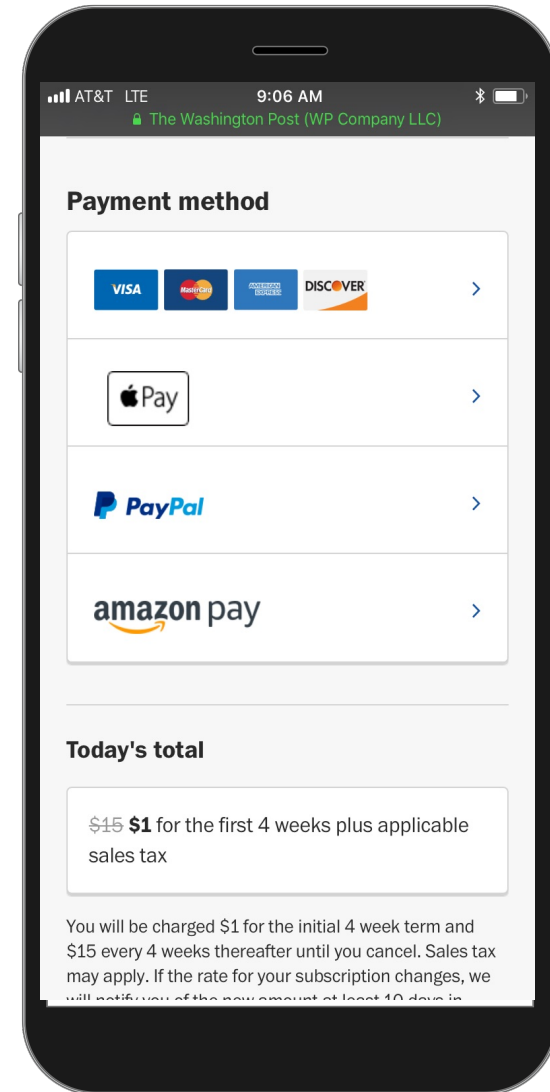


Payment Options

RECENT ADDITIONS OF AMAZON PAY AND APPLE PAY



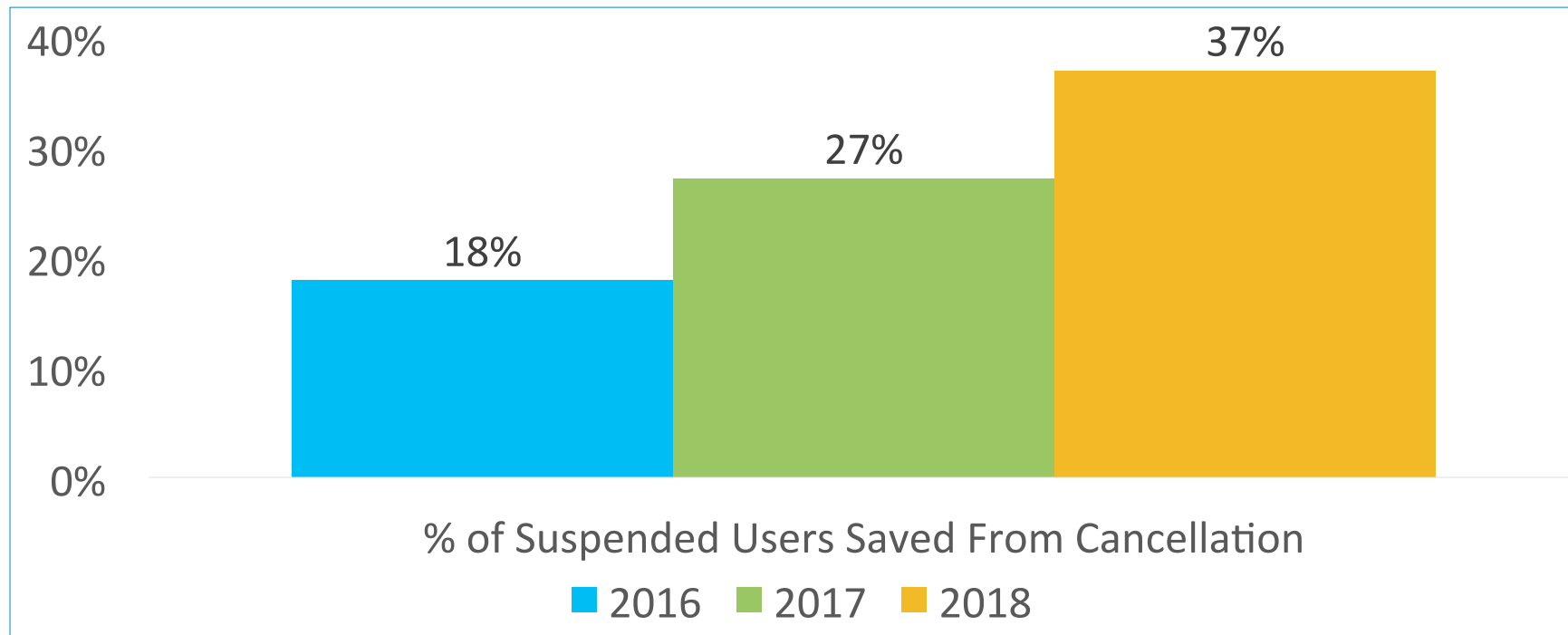
Google Play





Decreasing Involuntary Cancellations

SAVE RATES ARE IMPROVING – UP 19% FROM 2016



Source: The Washington Post – Digital Subscribers Database

Retention



Increasing Subscriber Retention



Fostering Engagement

CONSTANTLY EXPERIMENT WITH NEW SITE FEATURES, LIKE SOCIAL SHARE BARS ON U.S. PAGES

- In 2017, sharing on social media increased by (8%) in the U.S. but slightly declined elsewhere



Questions