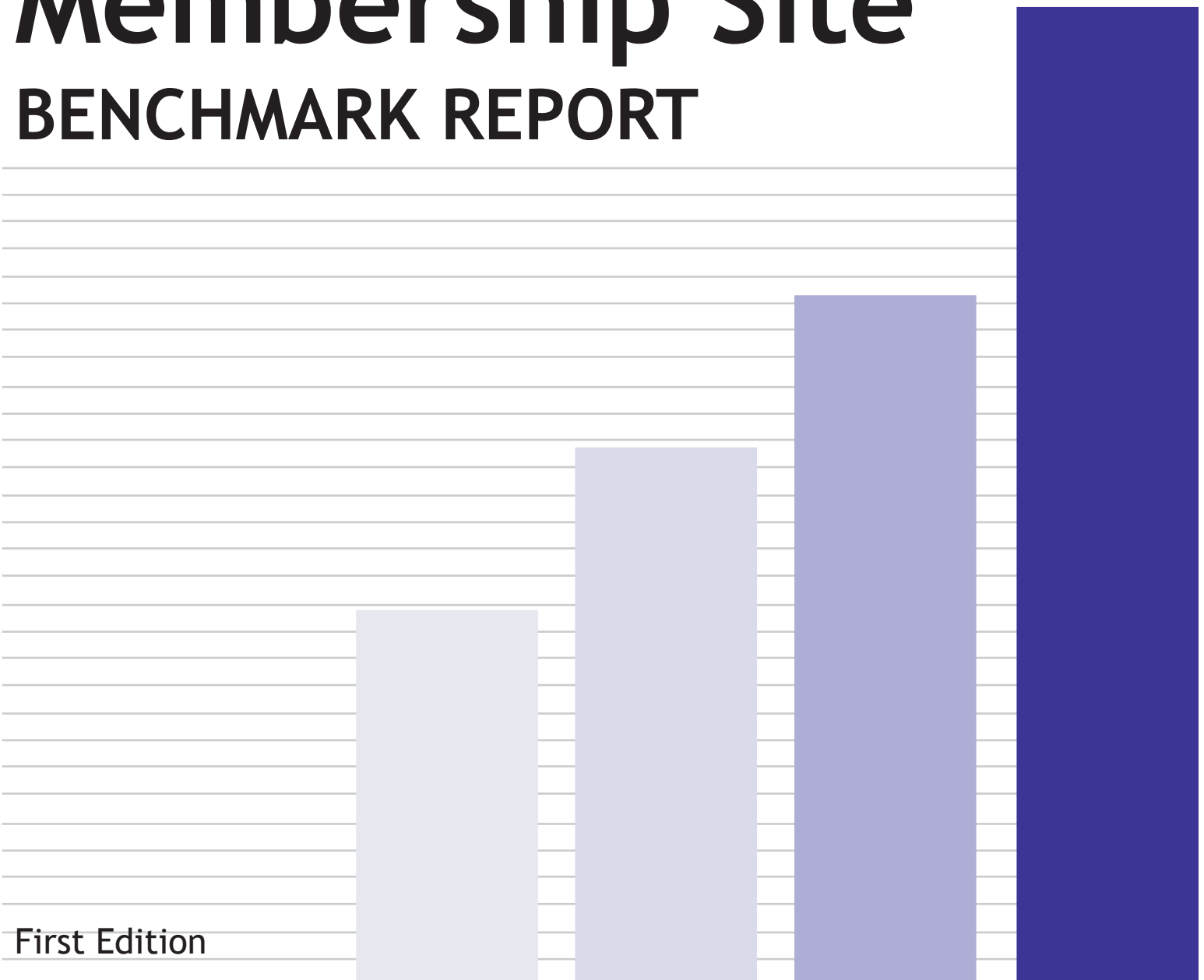


Subscription & Membership Site

BENCHMARK REPORT



First Edition

PUBLISHER'S LETTER

This Benchmark Report was begun as an act of gratitude. Over the last 20-odd years the paid content subscription and membership world has been very good to me, and I wanted to “give back” by sharing some of what I’ve learned about how to succeed with useful statistics to help others do the same. But, along the way, my gratitude turned to quickened interest.

Our research has uncovered an enormous amount of opportunity. In fact, as you’ll see, we anticipate this industry to continue steadily on its 15-year track of growing by about a billion dollars a year.

I’m a huge believer in basing key business decisions in research. So, I was rather horrified to discover that almost no new research data has been published about subscription sites since early 2006 when the last comScore/IAB report came out. So, we had to gather an enormous amount of information to create this Report. Our sources included:

SubscriptionSiteInsider.com Annual Executive Survey

In September 2009, we fielded three new online surveys, reaching out to executives personally involved in the industry. Survey respondents included:

- 302 subscription and membership site executives
- 227 media and publishing executives contemplating subscription sites
- 97 executives working for software firms, consultancies and private equity serving the subscription site industry.

We’d like to thank the many supporters who helped us get the word out about the surveys, especially including Miles Galliford of SubHub, Charlie Terry, Bill Baird, the InfoCommerce Group, Online Dating Insider, and Tim Kerber, head of both MembershipSiteOwner.com and Membergate.

SubscriptionSiteIndustry.com Observational Study of 550 Subscription Sites

Over a period of 120 days in mid-2009, our in-house research team personally examined and gathered data on 550 subscription and membership sites. This effort was made doubly difficult by the fact that no list or directory of current subscription sites existed. You’ll find our list at the end of this Report, which we’ll be adding to in coming months on our site. Throughout the report you’ll find the exclusive data from our real-life observations of the sites themselves, including their site design, trial offers, term offers, pricing, and marketing.

Specialized Information Publishers Foundation 2009 Study

In May 2009 the Specialized Information Publisher’s Foundation published a new study, together with MarketingSherpa, based on survey data of their members, including

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traditional print and online subscription publishers. The Foundation was gracious enough to allow our researchers access to their original data so we could slice out and publish statistics specific to online subscription publishers. Although the Study is from May 2009, our slices and occasional analysis are entirely new.

Additional Third-Party Research Sources

We also spent countless hours garnering data from other sources to create snapshot tables so you could see at-a-glance facts about subscription site revenues, conversion rates, unique monthly traffic, inbound links, and M&As.

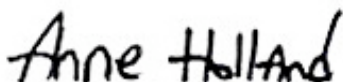
Our additional sources included, but were not limited to, InfoCommerce Group, VSS Communications Industry Forecast 2009, Forrester, Compete Inc, Belden Interactive, MarketData Enterprises, Ask500People.com, and the Pew Research Center. Every chart and table in this Report includes sourcing information so you can see precisely where and when the data came from.

All in all, this Benchmark Report includes:

- 147 New Charts
- 22 Tables
- 16 Illustrations
- An alphabetical list of 550 subscription and membership offerings

The vast majority of this data is all-new and exclusive, gathered during the third quarter of 2009. We hope you find it very practically useful. If you have any comments or questions, we look forward to hearing from you.

Best of luck with your own subscription site efforts!



Anne Holland

P.S. There's some confusion in the industry about the terms "subscription site" and "membership site". The terms are largely interchangeable. Executives from traditional media tend to use the term "subscription site" while online entrepreneurs tend to use the term "membership site." In both cases, the sites offer content for sale – sometimes in addition to features such as private community -- with an automatic renewal, also known as "recurring billing".

We did not study sites outside the content space, nor did we study media that's marketed online but 100% fulfilled offline. Our focus was strictly on online content subscription sites. It's nearly a \$15 billion industry in 2009, and growing by roughly a billion dollars a year.

EXECUTIVE SUMMARY

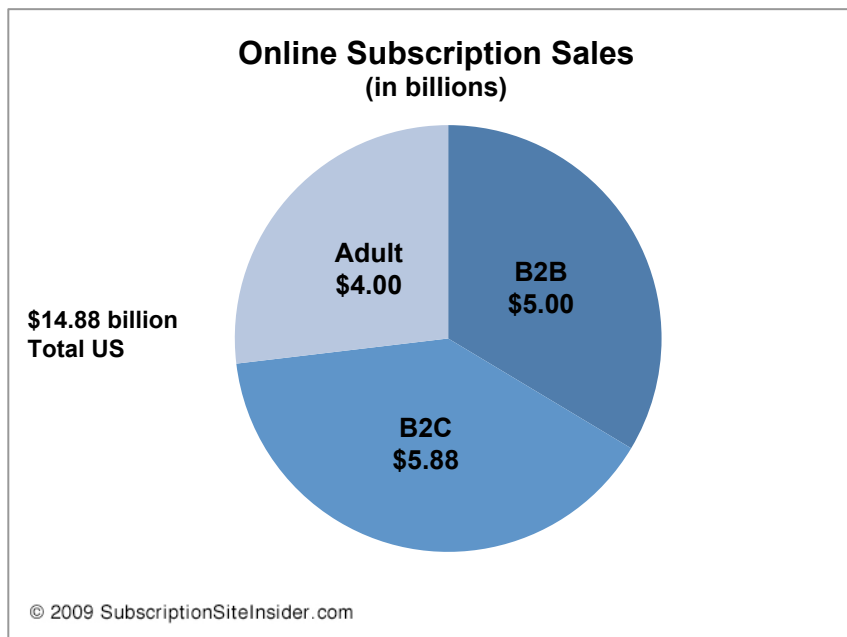
Welcome to the first edition of the world's first comprehensive stats and metrics guide of the subscription content site industry. We define this industry as composing of all content media – text, video, audio, and interactive content – that is sold by subscription and fulfilled mainly through the Internet.

The industry's been around since the very start of the Internet – in fact many B2B information publishers sold 'site licenses' to electronic versions of their content in the early 1990s. By the mid-90s, many subscription site brands were launching, including Classmates, match.com, WSJ.com, Ancestry.com, and ConsumerReports.org.

Today 4.3 million pay for Classmates membership, while match.com publishes paid sites in 24 countries. With a million paid online subscribers, WSJ.com is a critical division of the largest circulation newspaper in the US; Ancestry boasts nearly a million paid subscribers; and, ConsumerReports.org has 3.3 million online subscribers.

From the start, the industry has been a mix of traditional media corporations and upstart pure-play entrepreneurs. It's still wildly disparate. There are subscription sites with hundreds of employees and profits in the millions. And, hundreds of subscription sites are far smaller mom-and-pop operations. Nevertheless, we all face many of the exact same technical and product development challenges, while measuring our businesses against the same acquisition, conversion and lifetime value statistics.

CHART 1.01: Total US Online Subscription Sales 2009



Source: SubscriptionSiteInsider.com estimates based on a wide array of publicly available sources, data partnerships, and exclusive interviews.

Above you'll see our estimate of today's US subscription site industry. We break out these stats and show you where the numbers came from in Chapter One. To be honest,

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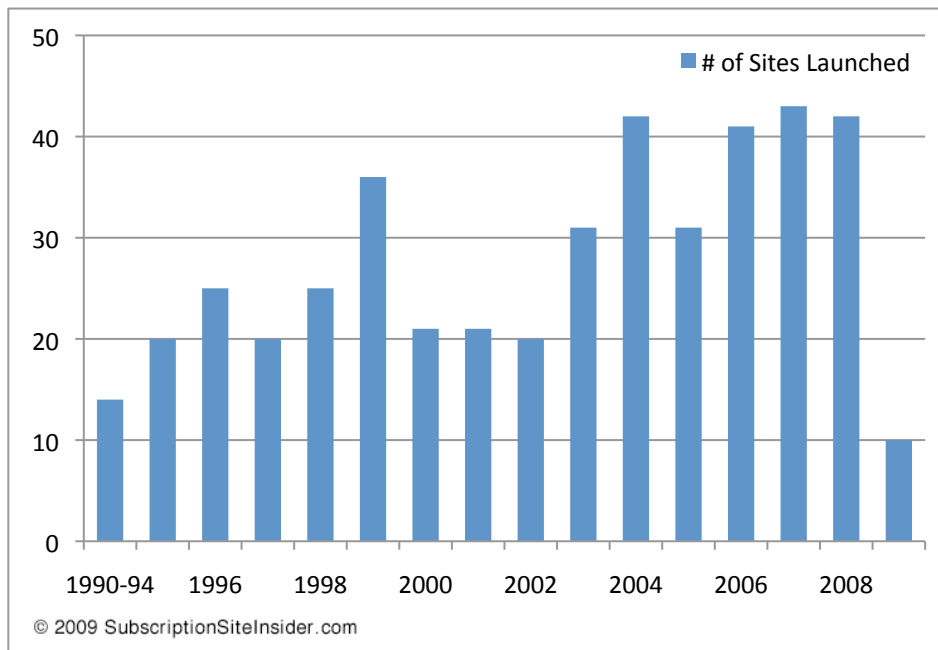
this estimate is an extremely moderate one. As online publishers ourselves, we prefer realistic numbers to hype.

Currently the largest B2C slices outside of adult are online games and dating, hovering around a billion dollars each. (Note: aside from this chart, we do not cover adult-specific stats in this Report, although adult publishers may find some of the information useful.)

The industry as a whole continues to grow at about \$1 billion per year. Some of the very largest players – those who’ve been aggressively optimizing their acquisition and conversion tactics for years – have seen slowed growth recently. That’s partly due to product maturity and partly due to the recession. But, hundreds, if not thousands, of other sites are still growing rapidly or have the capacity to do so either because they are much newer – and thus have plenty of low-hanging fruit yet to pick – or because they simply haven’t optimized their marketing or site design quite yet. For more on that see below as well as Chapters Three and Four.

In addition, we expect a lot more launches over the next year. In fact, the majority of the hundreds of executives we surveyed for this study told us they were planning a launch in the next 12 months – either an additional site or for the first time.

CHART 6.05: Launches Per Year: Observed Subscription Sites 1990 Through Mid-2009



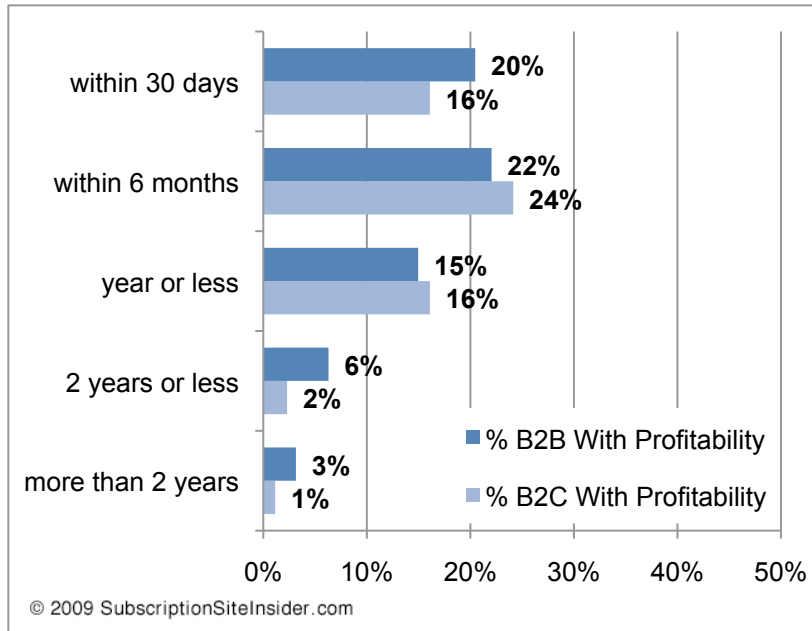
Source: SubscriptionSiteInsider.com Observational Study of paid subscription content sites conducted June-September 2009. Study n=550.

Please note – the bar for 2009 above is truncated because it only includes the launches we included in our observational study of 550 total subscription sites. We’re including this chart in the Executive Summary to show you how steady industry growth has been over the years. If you were to believe the media hype, subscription sites have only existed as a viable concept at two times in Internet history – first in 2001 and then again now in 2009. Both of these were times when the online ad market was suffering, so the

media turned to subscriptions as their ‘online media salvation’ story de jour. However, entrepreneurs and publishers have been steadily launching subscription sites throughout the years, pretty much ignoring whether they’re hot or not in the general business media.

What matters in business is making money, not being fashionable. Even moderately well run subscription sites make money, and they always have done.

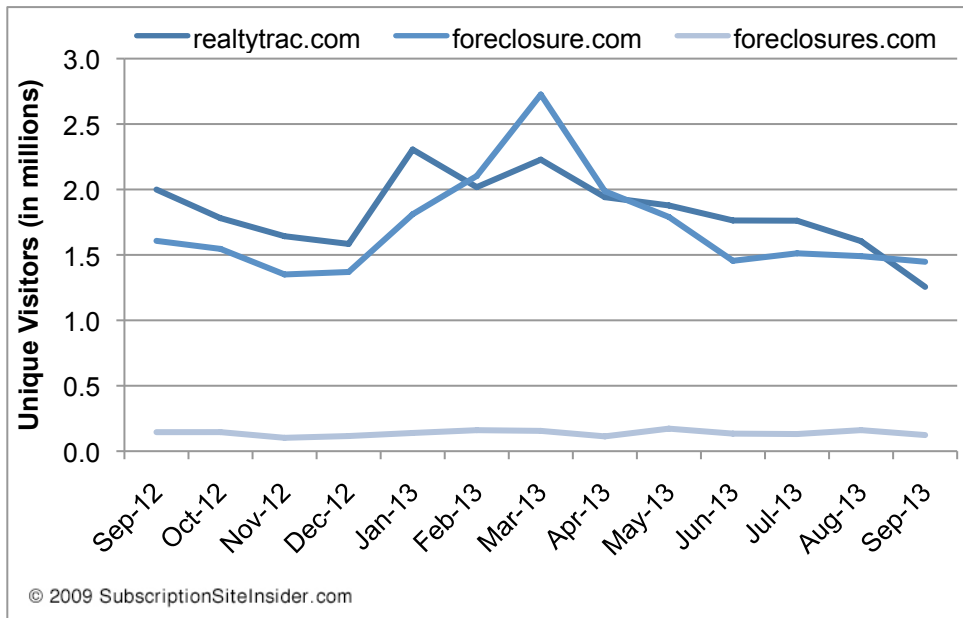
Chart 1.06: Launch-to-Profitability Timeframe: B2B vs B2C Profitable Subscription Sites



Source: SubscriptionSiteInsider.com Survey of Subscription Content Site Executives conducted September 2009. Survey n= 302.

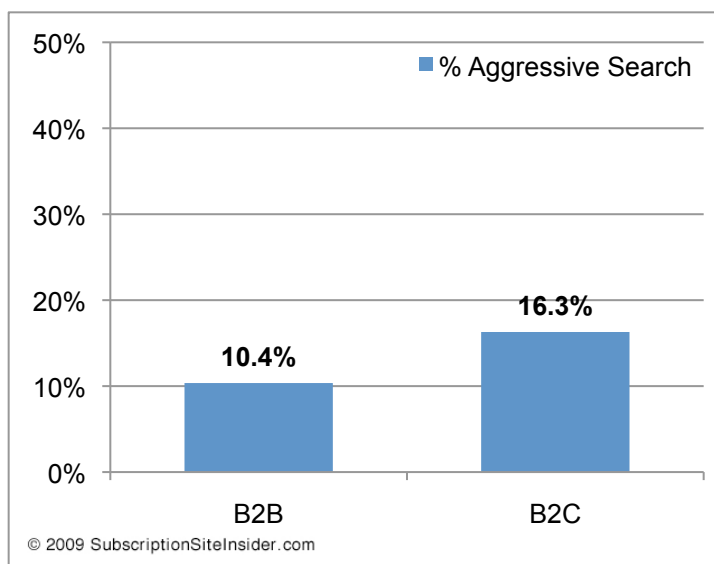
Not every subscription site is profitable. At less than \$10,000 initial investment (if you create your own content), the barrier to entry is low enough that some entrepreneurs get into the industry who are not capable of the precise and sustained effort required to make a profit. This means every year dozens of sites are launched and then abandoned a few weeks or months later. Dozens more continue on, run more as part-time hobbies than a full-time business. In this, the subscription site industry resembles other easy-to-open small businesses.

Nevertheless, 17% of sites we surveyed are making profits in excess of \$1 million per year (yes, that’s *profits* not revenues.) In addition, there’s a happily prosperous ‘middle class’ of sites making profits in the solid six figures. Sometimes this is what the niche marketplace they appeal to will bear, but we suspect often if these sites made a few adjustments, they’d do even better....

Chart 2.28: Real Estate Info Sites: Unique Monthly Traffic

Source: SubscriptionSiteInsider.com original research using Compete Inc data from September 2009

Even though there's an incredible amount of real estate information on the Internet for free, these paid subscription sites are still attracting millions of unique visitors every month. This chart is a lesson for every industry naysayer who worries that 'people won't pay for online content because there's too much for free.'

CHART 3.18: Percent of Subscription Sites with Aggressive Search Marketing

Source: SubscriptionSiteInsider.com Observational Study of paid subscription content sites conducted June-September 2009. Study n=550.

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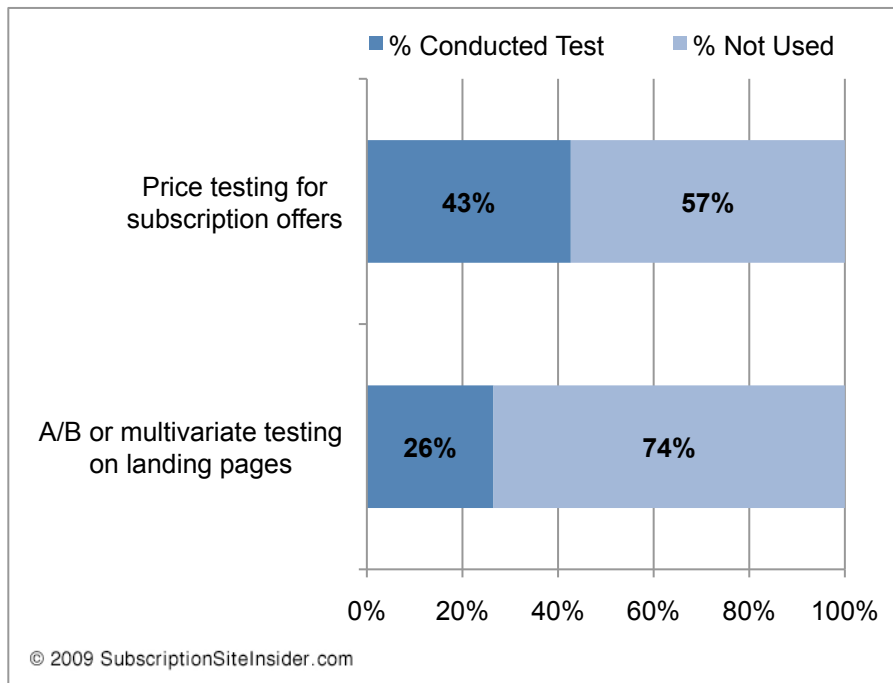
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Although larger, mass-market sites such as match.com advertise heavily, and sites in the personal investing universe have a history of buying ads in each other's email newsletters, the majority of mid-sized and small sites rely heavily on search engine traffic as their main source of new traffic. To some degree this makes sense because many of them are in such focused niches.

So, you can see why we were shocked by how badly most of the 550 sites we examined in detail this year are doing with search marketing. The above data shows you what percent of sites are both running ads and appearing in the page one organic listings for niche search terms critical to their offerings. We cannot conceive of other types of ecommerce sites being this listless in regards to search marketing.

Subscription sites have a lot of growing to do.

CHART 3.43: Tests Used by Subscription Sites to Maximize Profits



Source: SubscriptionSiteInsider.com Observational Study of paid subscription content sites conducted June-September 2009. Study n=550.

Here's another area where subscription sites stand out as laggards. In offline subscription marketing, price testing is a normal best practice tactic to make sure your business is as strong as possible. Somehow more than half of online subscription marketers haven't caught on to this yet. How many sales are they making today that could have been for more money? Or, how many more units could they have sold if they'd just altered the price a bit?

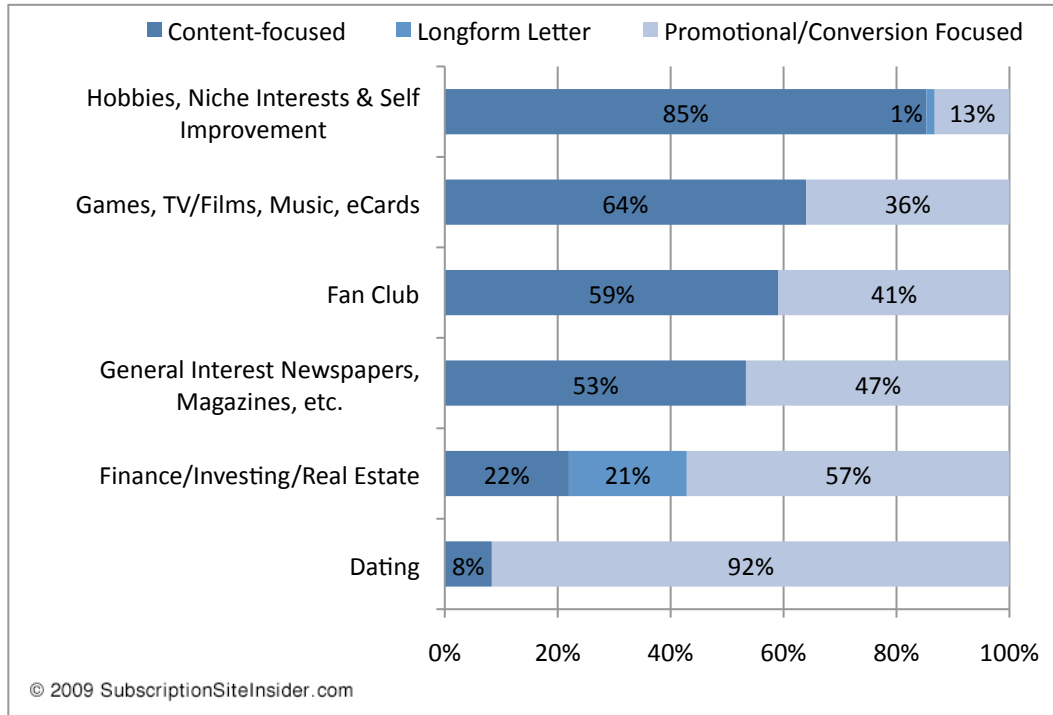
A/B and multivariate testing is also a proven method to improve business results. A typical site that's never tested before will, on average, see a conversion lift of 40%. How many potential subscribers are bouncing off your site now or abandoning your cart midway? With some testing, you can keep more of them around long enough to order.

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Both price tests and A/B tests are remarkably easy to run online. Free and very low cost software options are available to help you. There's even free online training. There's money on the table that your site could be making; why not reach out and take it?

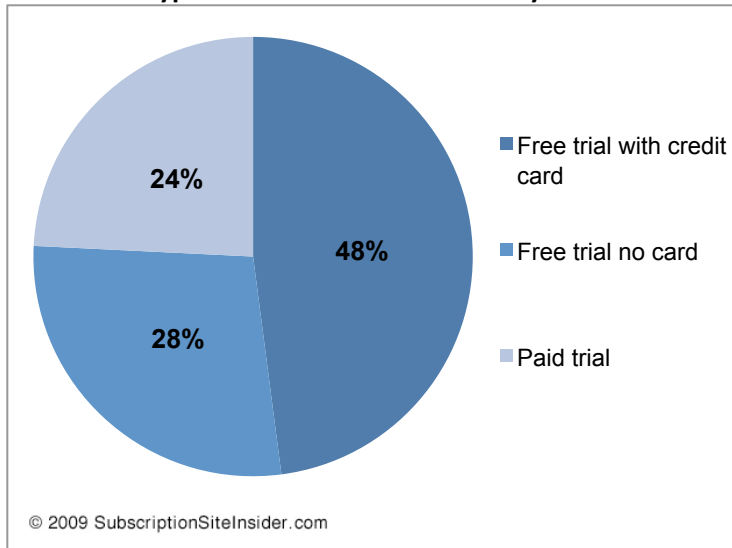
CHART 3.35: Homepage Style By Site Topic: Consumer Sites



Source: SubscriptionSiteInsider.com Observational Study of paid subscription content sites conducted June-September 2009. Study n=550.

Given the lack of a testing culture among many sites, we suspect the reason why many of them have the homepage design they use is either because “it came with the software template”, or because “it looks like other sites I think are doing ok” or “it looks ok to us.” The real reason that should matter – it impresses and converts more subscribers – is not considered.

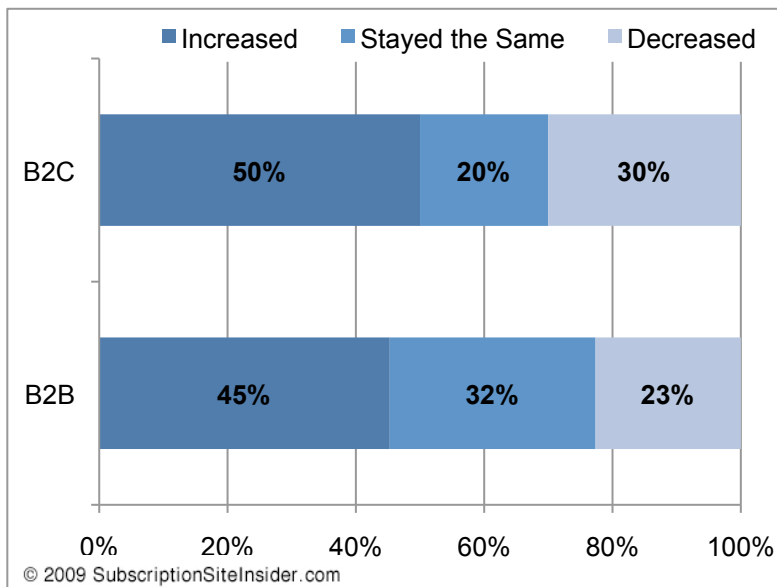
We can't tell you what type of design is best for your homepage – or your barrier page (aka pay wall) – because everyone's audience and offering is different. However, we do reveal here what the most typically used designs are in each niche. You'll find an illustration of each in Chapter Four.

Chart 4.06: Types of Trials Offered Online by Observed Subscription Sites

Source: SubscriptionSiteInsider.com Observational Study of paid subscription content sites conducted June-September 2009. Study n=550.

The above chart illustrates another opportunity for many sites. Although ample Case Study evidence since 2002 – from WSJ.com among others – has shown that offering a free trial without a credit card is a losing proposition, 28% of observed sites offering trials still use this.

Some publishers fear that asking for a credit card will hurt their reputation or business. As long as you follow simple, best practices guidelines, the reverse is true. Asking for a credit card up front is good – and honest -- business.

Chart 4.03: Conversion Trends Reported by SIPA-Member Sites 2008-09

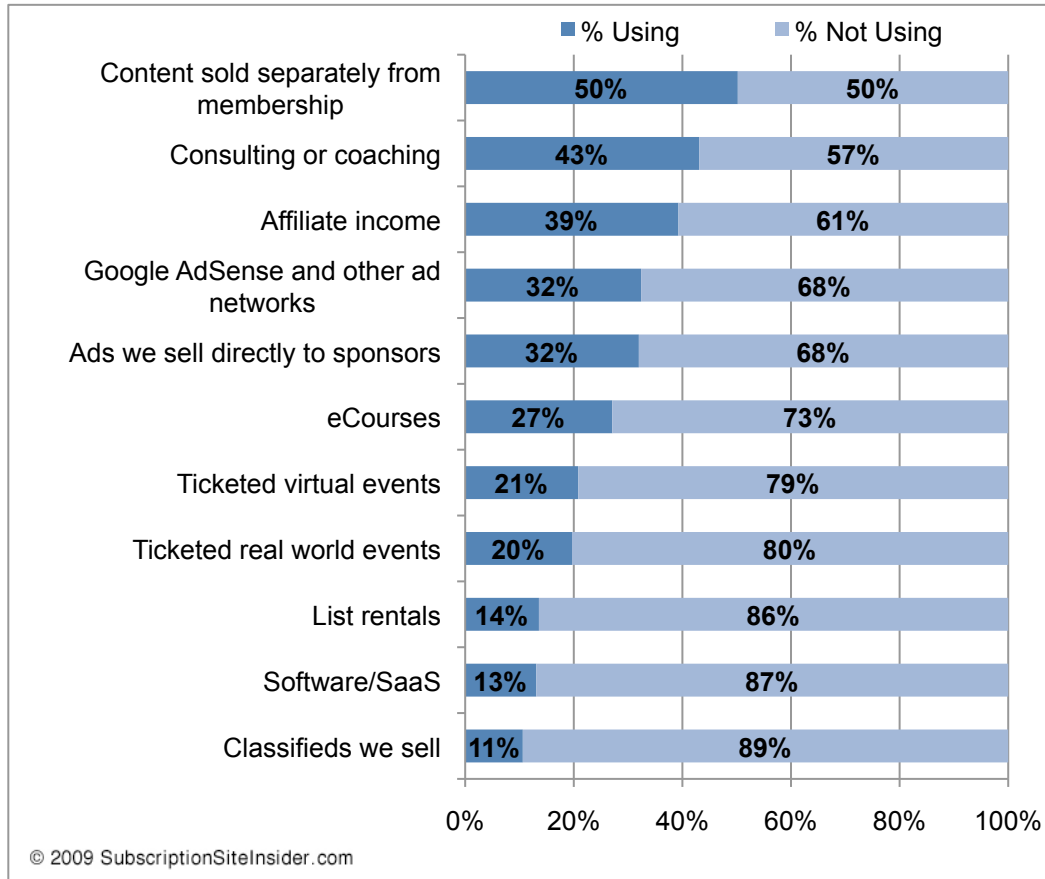
Source: Specialized Information Publishers Foundation (SIPF) 2009 Paid Content Study. The slice of data we used had n= 87.

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Has the recession hurt online subscription sales? According to these SIPA members, who are mainly established B2B publishers, their sales are doing better than expected. This should be heartening news for everyone.

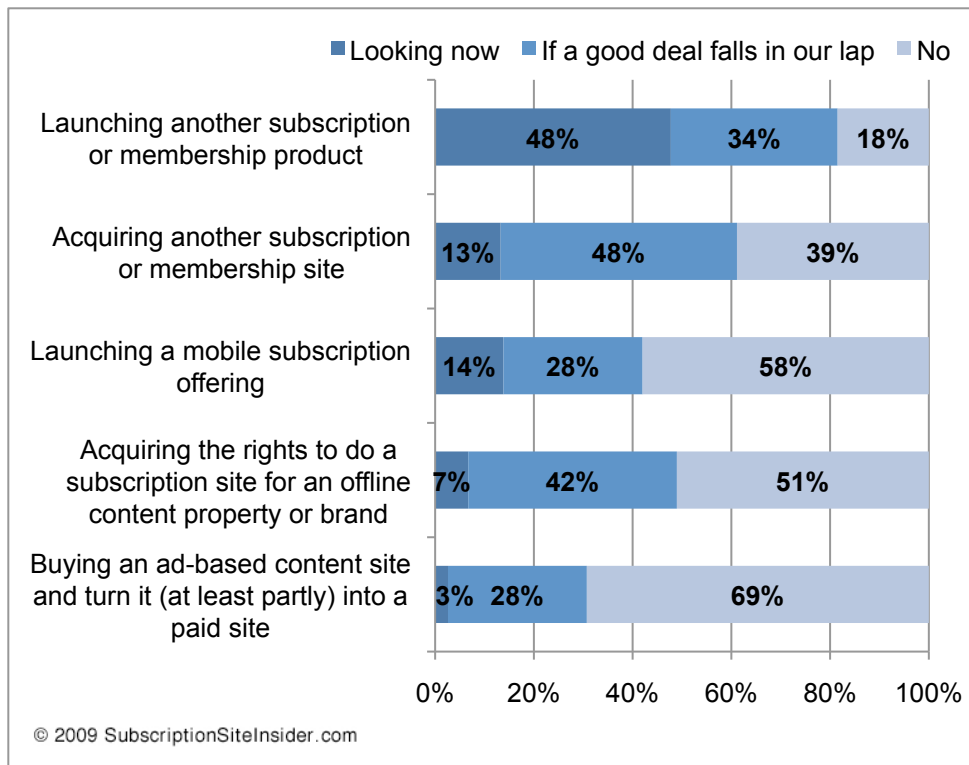
CHART 5.02: Types of Non-Subscription Revenue Sources for Hybrid Model Sites



Source: SubscriptionSiteInsider.com Survey of Subscription Content Site Executives conducted September 2009. Survey n= 302

In the mid-90s surveyed print subscription newsletter publishers revealed that an average of 40% of their total company revenues came from “ancillaries” – in other words, ad sales and/or other offerings they sold to their subscribers.

So, you can see why we laugh at the “debate” over the possibility of hybrid subscription site models. Of course you should have additional revenue streams! In fact you need them for optimal profits. The data above shows that at minimum, 50% of subscription sites are not making the money they could be. See Chapter Five in this report for a little more information on hybrid models and ancillaries.

CHART 6.01: M&A and Expansion Investments Under Consideration by Subscription Sites

Source: SubscriptionSiteInsider.com Survey of Subscription Content Site Executives conducted September 2009. Survey n= 302.

Wow, color us surprised by how interested subscription site executives are in potential expansion. More data in Chapter Six shows the interests of other media executives as well.

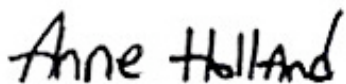
As a rule, there are two paths to becoming a very big subscription company. The first is to own a major brand with mass-appeal such as World of Warcraft. The second is to own a lot of little, beloved-within-their-uber-niche, brands and optimize profitability by sharing management, admin and tech costs across many sites. We suspect the bigger brands are among the most tantalizing media properties on the Web during these depressed ad-sales sales. We also suspect at least a few entrepreneurs will try building empires by acquisition, little site by little site, in the next months. In fact, it's already happening!

More Highlights and Must-Read Data:

As you review the data in this report, be sure not to miss our Top Baker's Dozen Favorites:

- #1 TABLE 1.01: Subscription Revenues of Named Sites and Service Providers
- #2 CHART 1.02: Typical Annual Profits Reported by Profitable Subscription Site Execs
- #3 CHART 2.01: If Facebook Charged \$1.99 per Month, Would You Pay?
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- #12 CHART 5.04: Hybrid Publishers Rate Revenues From Specific Non-Subscription Sources
- #13 CHART 6.10: Subscription Sites Considering Going on the Block

Enjoy!



P.S. Special offer: If you'd like our entire 158-page Benchmark Report, *order by December 15th and get \$50.00 off!* For your discounted, instant-download copy (plus a bonus printed-and-mailed copy) use the order form on the last page of this Excerpt or go to <http://www.SubscriptionSiteInsider.com>

P.P.S. I have included our Table of Contents on the next pages, so you can review all 185-charts, tables and illustrations to see if this new benchmark Report is right for you. Thanks for your interest!

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