

Google™ **A few random thoughts about digital magazines**

March 22nd, 2013 @ ABC Media Breakfast Briefing

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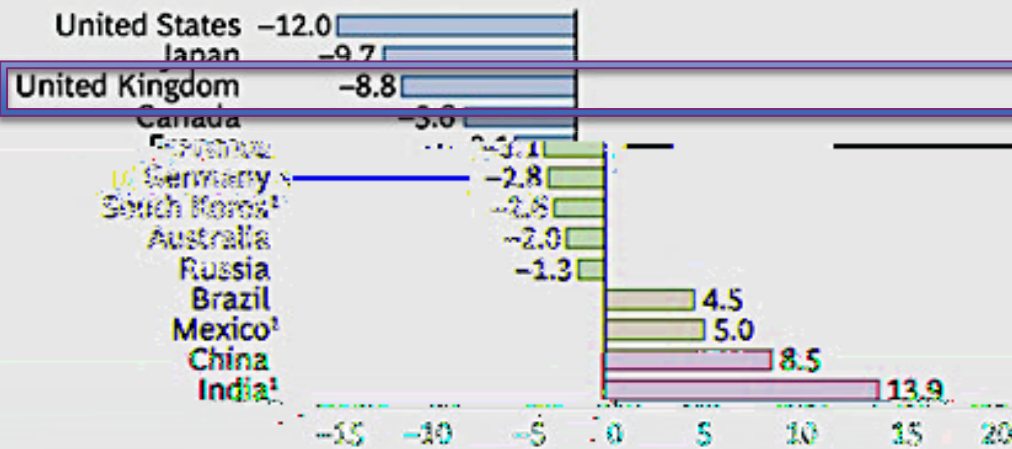
Head of Strategic Partnerships, Google News & Magazines

EXHIBIT 1 | Markets Are Evolving at Differing Speeds

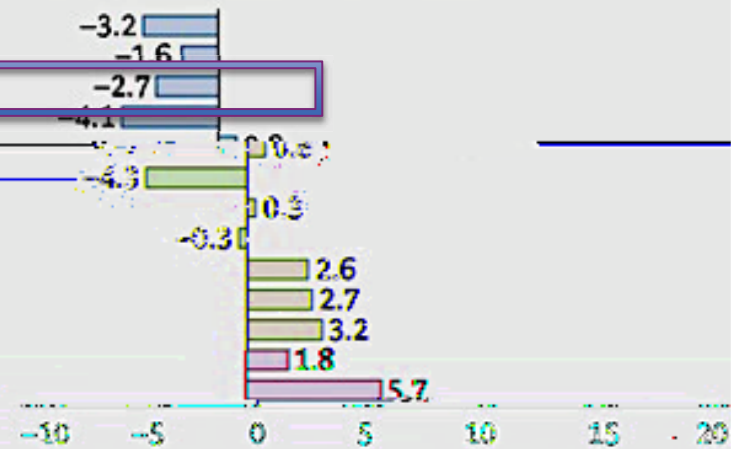
Source: BCG

Newspapers

Print advertising CAGR (%) 2006–2011

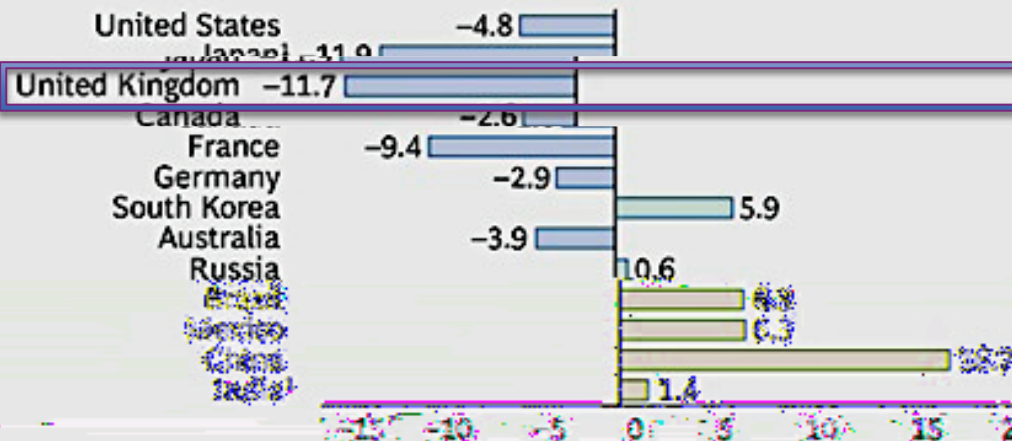


Print circulation CAGR (%) 2006–2011



Magazines

Print advertising CAGR (%) 2006–2011



Print circulation CAGR (%) 2006–2011



Sources: ZenithOptimedia; Editor & Publisher International Yearbook, Japan Newspaper Publishing & Editors Association; U.K. ABC; Newspapers Canada; CIBC; NTA Statista; Korea ABC; Australia ABC; Federal Agency for Print and Mass Communications of the Russian Federation; APJ, WPA; National Bureau of Statistics of China; Information Broadcasting Ministry of India; U.S. ABC; IARC Statistics Bureau; Magazines Canada; V&A; IFC; FWP; World Press Trends.

*Includes 2005–2010 print circulation. 2011 CAGR circulation data have not been released yet.

① Focus on the user

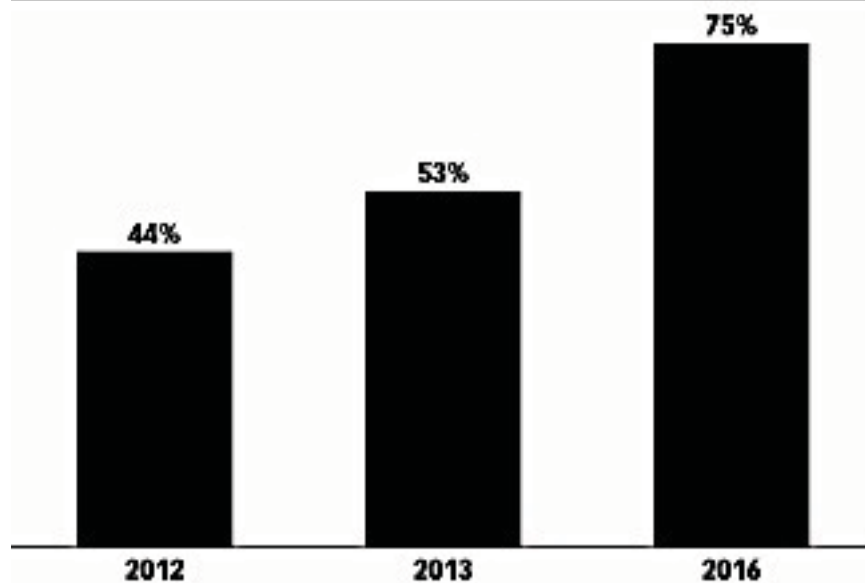
② Experiment & iterate

Users: behaviour?



UK Smartphone Penetration, 2012, 2013 & 2016

% of total mobile connections



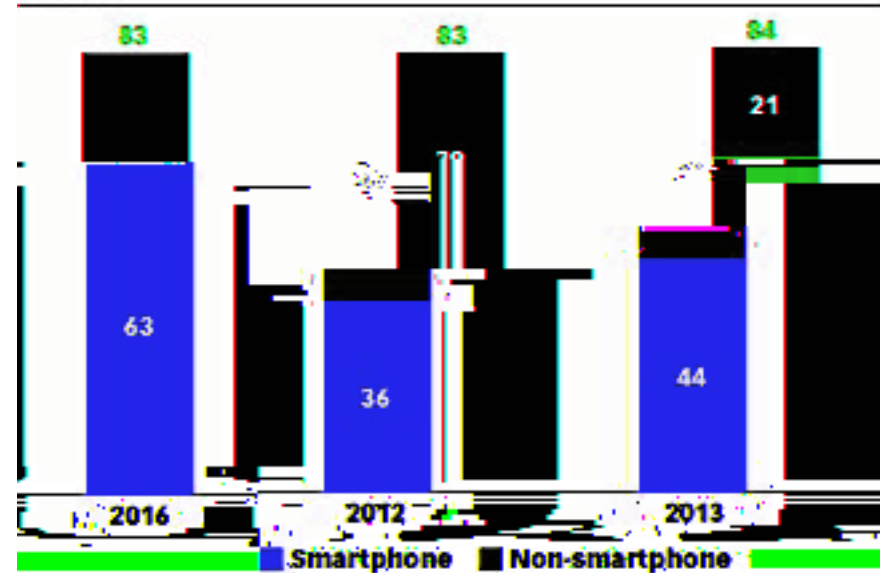
Source: Portio Research, "Worldwide Mobile Handset Installed Base 2012-2016" as cited in company blog, Jan 4, 2013

149879

www.eMarketer.com

UK Mobile Connections, by Device Type, 2012, 2013 & 2016

millions



Source: Portio Research, "Worldwide Mobile Handset Installed Base 2012-2016" as cited in company blog, Jan 4, 2013

www.eMarketer.com 149878

Enders: "By 2017...we forecast smartphone take-up will be as ubiquitous as broadband"
"80 million portable connected devices by 2017"

User: expectations?



The user shapes the environment around him/her based on their preferences



- interact with favourite content
- all the time
- anywhere
- on any device

Experimentation: UX & platforms? Google™



We're only just beginning



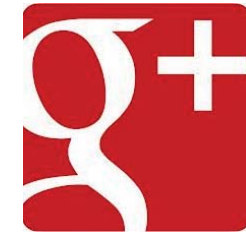
We're experiencing the **re-imagination** of nearly everything powered by new devices, connectivity, new UI
Mary Meeker - Internet trends 2012

We're at the **end of the digital beginning** as companies reshape and retool for life in the new normal
Price Waterhouse Cooper - 2012 media outlook

Oh yes, Google...



Google Play
Magazines



Google Plus



Google
Currents



Google Currents



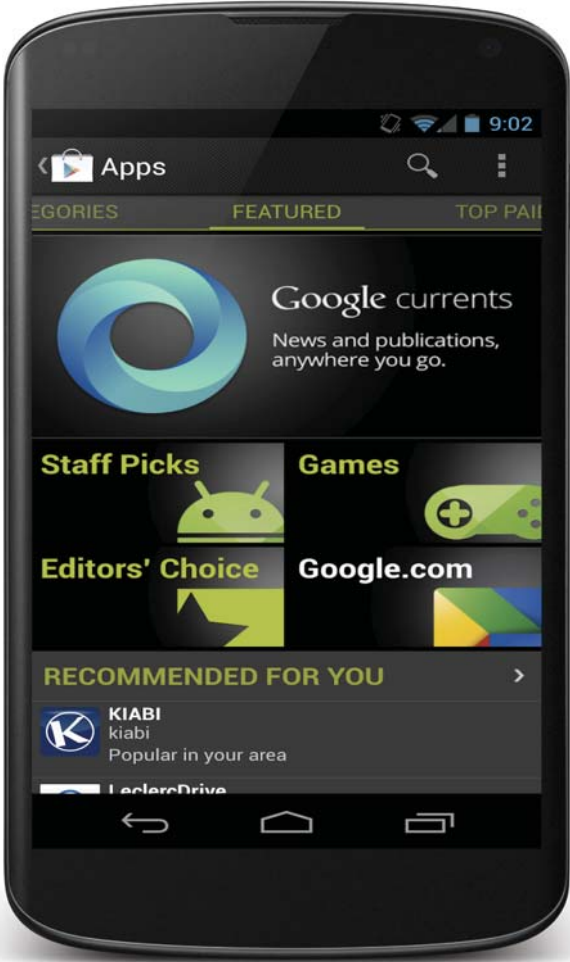
For Publishers

- a platform for publishers to produce magazine-like editions under their brands
- Android and iOS distribution

For Users

- one news reading app for smartphones and tablets
- high speed online and offline reading

Some Facts & Figures



Currents 2.0 - what's new ?



Breaking Stories Pick of the Week



How are the ads displayed ?



1st page of article



Leaderboard ad in flow of text



Full page interstitial between swipes



Next page of article

Play Magazines



june '12



october '12



october '12

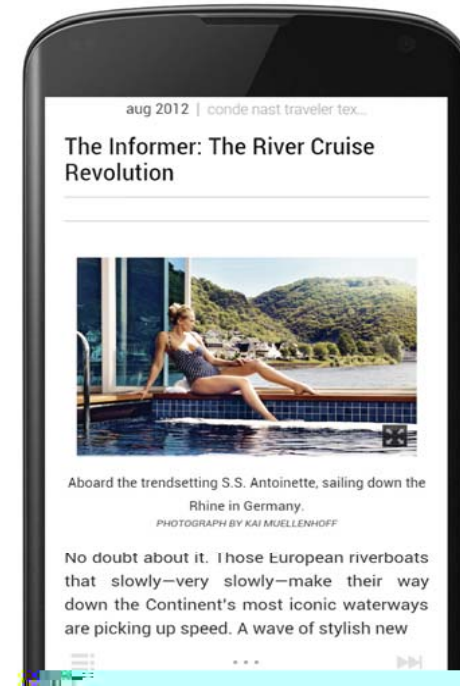
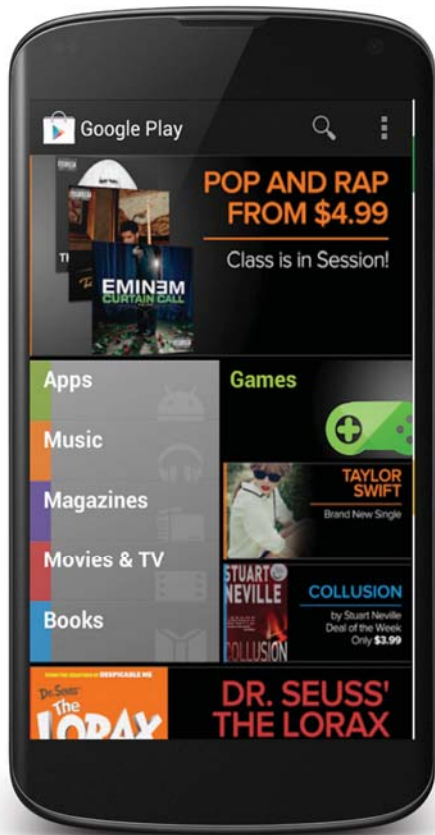


december '12

Future rollouts across Europe and beyond 2013



What does it look like?



SHOP

MY MUSIC

MY BOOKS

MY MAGAZINES

MY MOVIES

MY ANDROID APPS

- SHOP MUSIC
- SHOP BOOKS
- SHOP MAGAZINES
- SHOP MOVIES
- SHOP ANDROID APPS
- SHOP DEVICES



IN FASHION



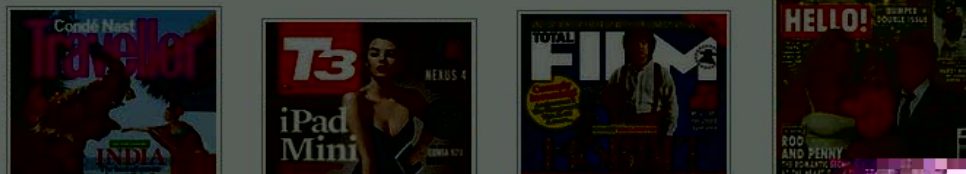
TOP MAGAZINES

CATEGORIES

Top Magazines

1  **MacLife**
JAN 2013
BUY

Staff Recommendations



Or be left behind...



The architecture of content ... continues to mirror the edition-oriented nature of the prior media forms.

Richard Gingras (Google) 2012

Every new medium begins as a container for the old.

MacLuhan - 1964

Thank You & Questions?

