

The Digital Landscape in 2011 and Beyond

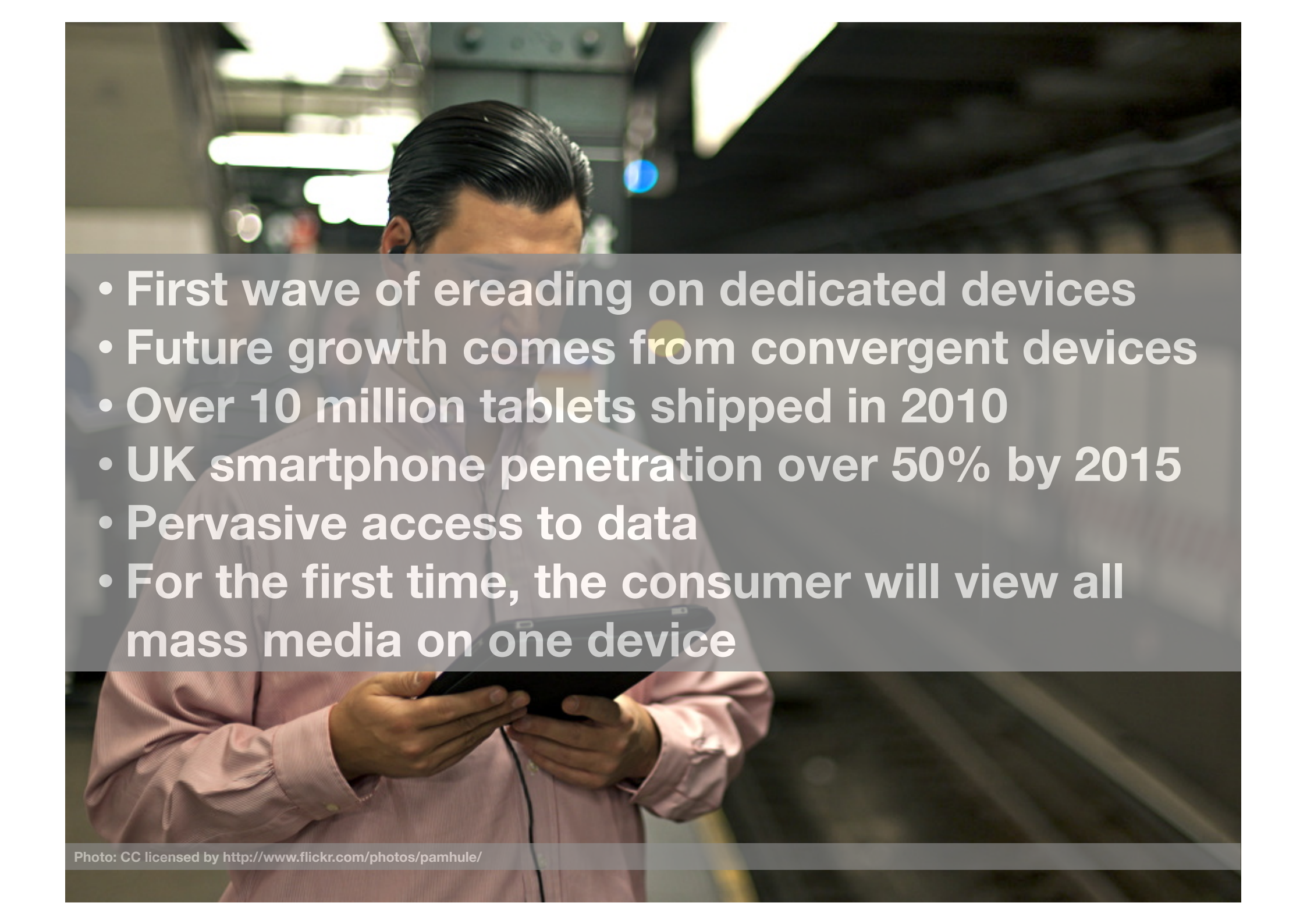
Presentation to BIC Conference, 30 November 2010


George Walkley, Hachette UK

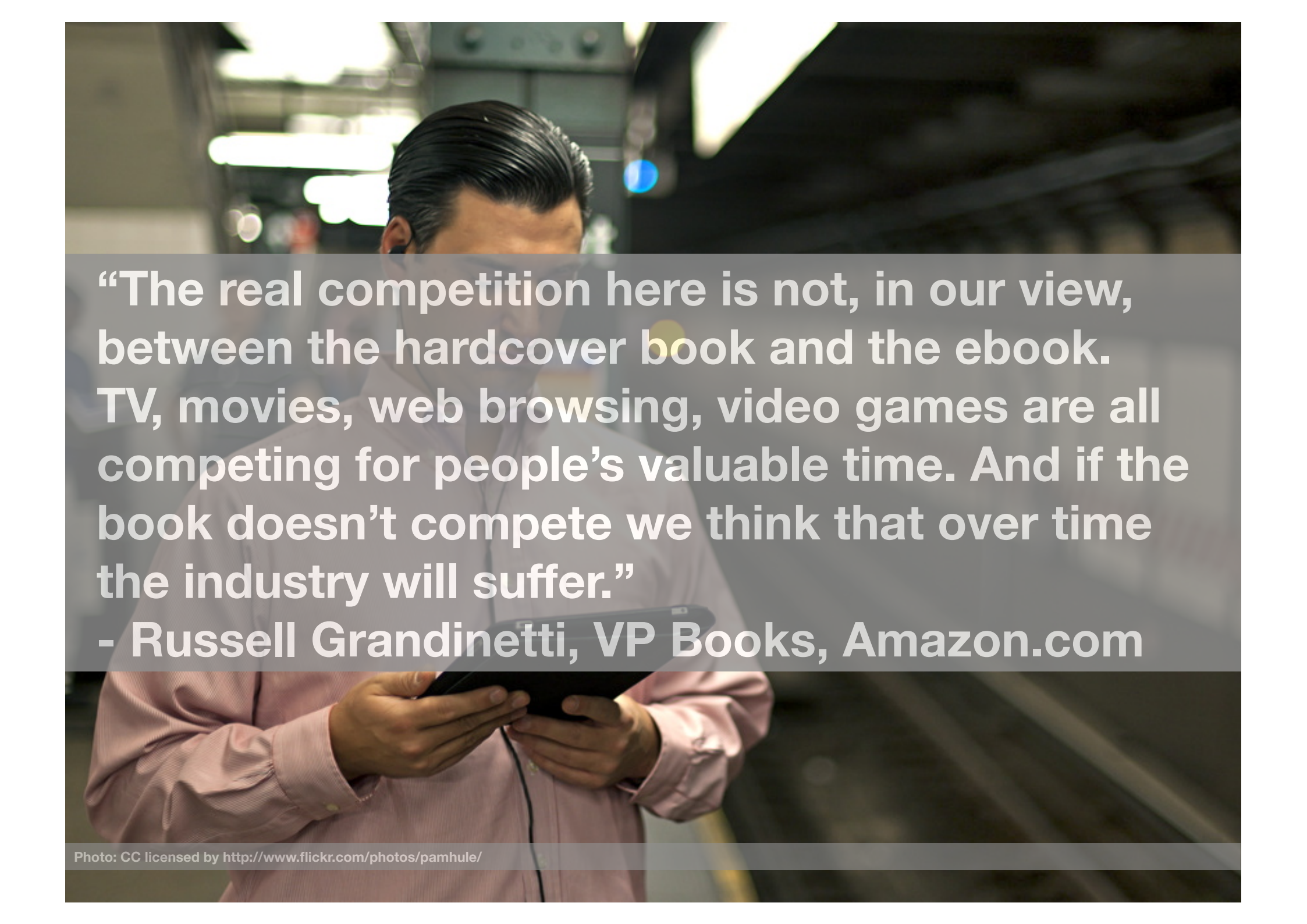
A man with dark hair, wearing a pink button-down shirt and a black earbud, is looking down at a black tablet he is holding with both hands. He is standing in what appears to be a transit station, with blurred figures of other people and station lights in the background. A semi-transparent grey banner is overlaid across the middle of the image, containing the title text.

The Technology Landscape

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- A man with dark hair, wearing a pink long-sleeved shirt, is looking down at a tablet computer he is holding with both hands. The background is a blurred industrial or warehouse setting with overhead lights and structural elements. A semi-transparent grey box is overlaid on the image, containing a list of bullet points.
- First wave of ereading on dedicated devices
 - Future growth comes from convergent devices
 - Over 10 million tablets shipped in 2010
 - UK smartphone penetration over 50% by 2015
 - Pervasive access to data
 - For the first time, the consumer will view all mass media on one device

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- A man with dark hair, wearing a light pink button-down shirt, is looking down at a smartphone he is holding with both hands. The background is a blurred industrial or warehouse setting with overhead lights and structural elements. A semi-transparent grey box is overlaid on the image, containing a list of statistics.
- The digital world produced 1.6 Zettabytes of data this year
 - 1.2 billion active websites
 - 2 billion messages per month posted to Twitter
 - Social networking 90% of 25-34, 67% of 55+
 - YouTube daily reach twice the combined audience of NBC, ABC, CBS

A man with dark hair, wearing a pink button-down shirt, is looking down at a tablet computer he is holding with both hands. The background is a blurred industrial or warehouse setting with overhead lights and structural elements. A semi-transparent grey box is overlaid on the image, containing a quote in white text.

“The real competition here is not, in our view, between the hardcover book and the ebook. TV, movies, web browsing, video games are all competing for people’s valuable time. And if the book doesn’t compete we think that over time the industry will suffer.”

- Russell Grandinetti, VP Books, Amazon.com




The Retail Landscape

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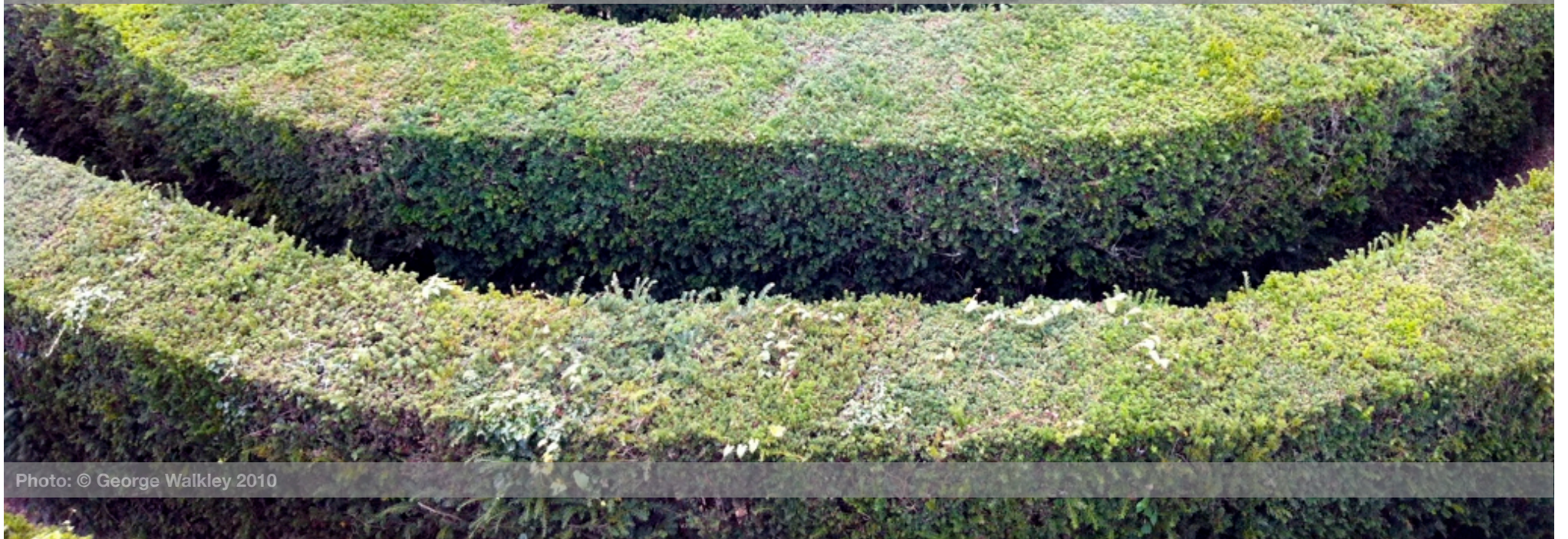
Appazoogle™



The logo is a playful combination of the Amazon and Google brands. The word "Appazoogle" is written in a sans-serif font. The "Appa" part is in light gray, while "azo" is in black. The "o" is a bright yellow circle. The "g" is blue, the "l" is green, and the "e" is red. A yellow curved arrow, characteristic of the Amazon logo, starts under the "a" and points towards the "o". A small "TM" trademark symbol is located at the top right of the "e".

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- **Complex supply chain, involving traditional participants and new entrants, local and global players**
 - **Major ebook players are increasingly global**
 - **Reorientation of ebooks from product to service, with cloud-based libraries shared across devices**
 - **Challenges in terms of content and expressing rights - both territorial and usage**



“You are in a maze of twisty passages, all alike”



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- Challenge becomes discoverability - how do consumers find their way through this abundance of content?
 - Metadata is fundamental, but systems are only as good as data input
 - Conceptual change required on metadata at point of creation
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- **Challenges in discoverability and metadata will be exacerbated by the promulgation of proprietary standards**
- **Standards-based approaches help us to navigate our way through an uncertain landscape**





Questions? Connect?

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