

7 Pillars of Digital Publishing Success

Understanding Integrated Digital Publishing

Today's Host



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Today's Speaker



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"Freedom of the press is guaranteed only to those who own one".



- AJ Liebling

Gutenberg Era vs. Jobs Era



Gutenberg Era vs. Jobs Era



Digital Publishing Trends

US Household Internet Usage

US Internet Households, by Type, 2009-2015

millions and % of total

	2009	2010	2011	2012	2013	2014	2015
Broadband	74.0	78.5	82.5	86.5	89.5	91.0	92.5
Dial-up	4.7	4.0	3.2	2.5	1.5	1.2	1.0
Total online	78.7	82.5	85.7	89.0	91.0	92.2	93.5
Online % of total households	67.0%	70.0%	72.5%	75.0%	76.5%	77.2%	78.0%

Note: includes connections with permanent access to the internet via cable modem, DSL, fiber and wireless/satellite technologies; numbers may not add up to total due to rounding

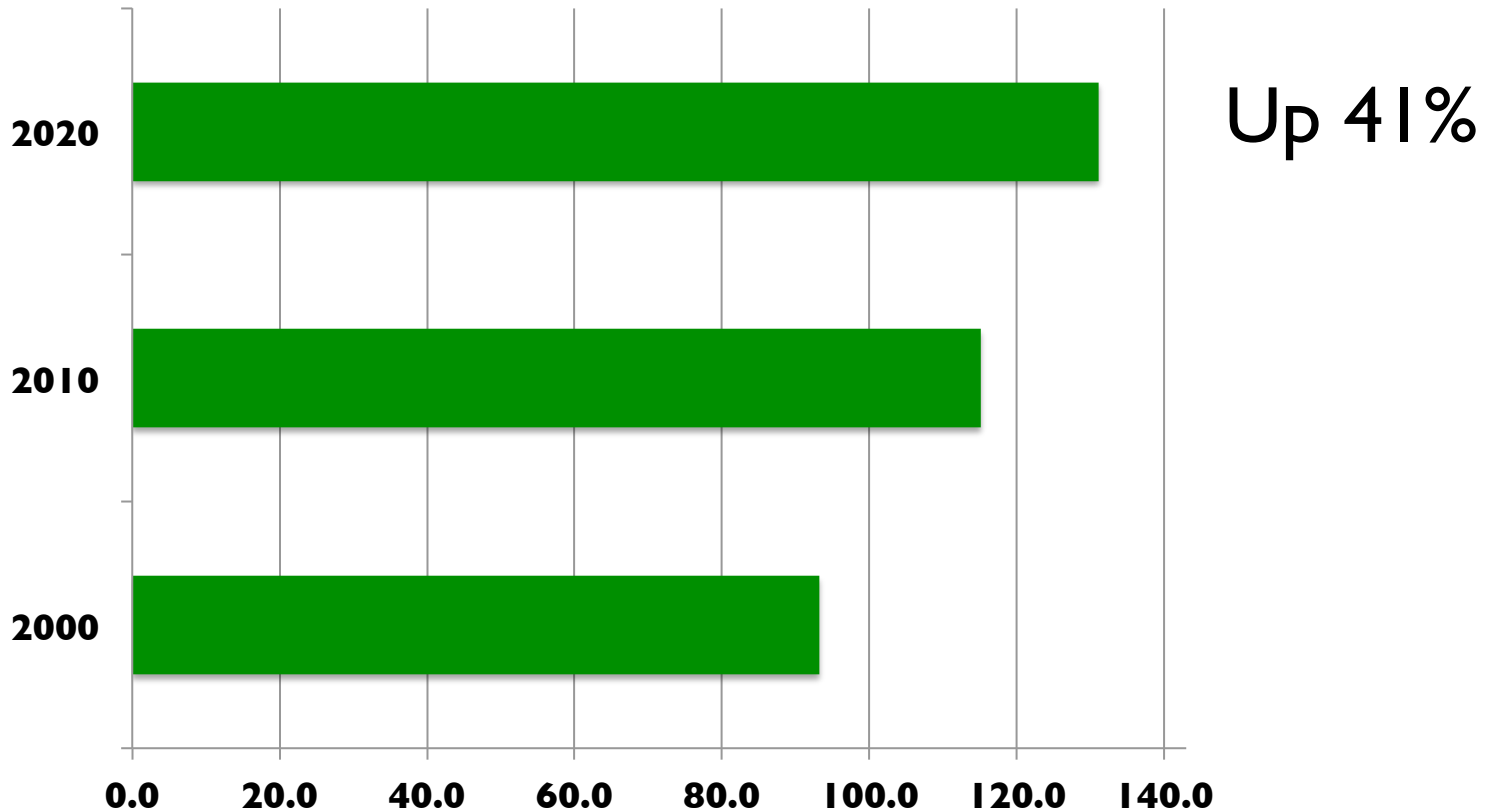
Source: eMarketer, March 2011

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www.eMarketer.com

2015: 78% US HH Penetration

US Population is Aging



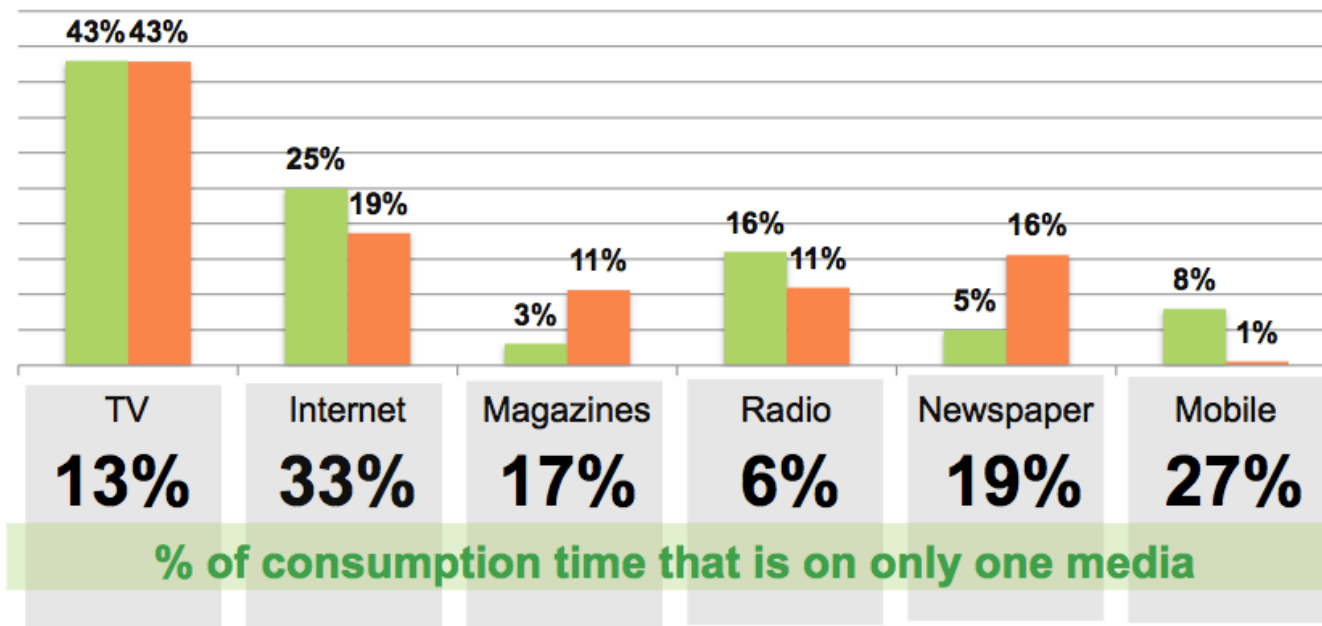
Source: U.S. Census Bureau, 2004

In 2020, 45-84 year old adults will number 131M

Media Consumption vs. Spend

Media Consumption vs. Media Spend (2011)

■ Time Spent ■ Ad Spend



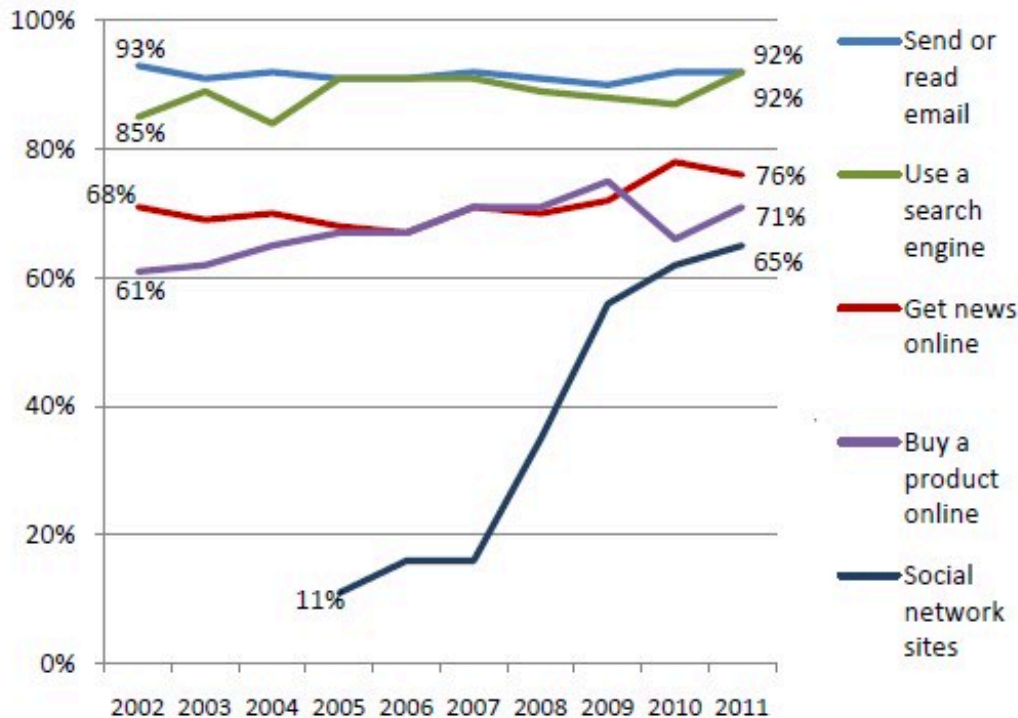
Source: eMarketer March 2011

Print Media Economics are Upside Down

US Internet Activity

Over time, search and email are most popular online activities

% of internet users who do each activity



92% use email

92% use search

65% use social

Source: The Pew Research Center's Internet & American Life Project tracking surveys, 2002-2011. Social network site use not tracked prior to February, 2005. For more activity trends, go to pewinternet.org.

US Search Activity

92% of adults search

59% do it daily

Who uses search?

% of online adults in each group who use search engines to find information online

	% of each group who ever use search engines	% of each group who use search engines on a typical day
All online adults	92%	59%
Gender		
Male	93	61
Female	91	57
Race/Ethnicity		
White	93	60
African American	91	57
Hispanic	87	48
Age		
18-29	96	66
30-49	91	64
50-64	91	52
65+	87	37
Education		
Some high school	81	29
High school	88	41
Some college	94	66
College graduate	96	75
Household income		
< \$30,000	90	38
\$30,000 - \$49,999	91	67
\$50,000 - \$74,999	93	66
\$75,000+	98	78

Source: The Pew Research Center's Internet & American Life Project, April 26-May 22, 2011 tracking survey. N=2,277 adults ages 18 and older. Interviews conducted in English and Spanish.

US Email Usage

92% of adults email

61% do it daily

Who uses email?

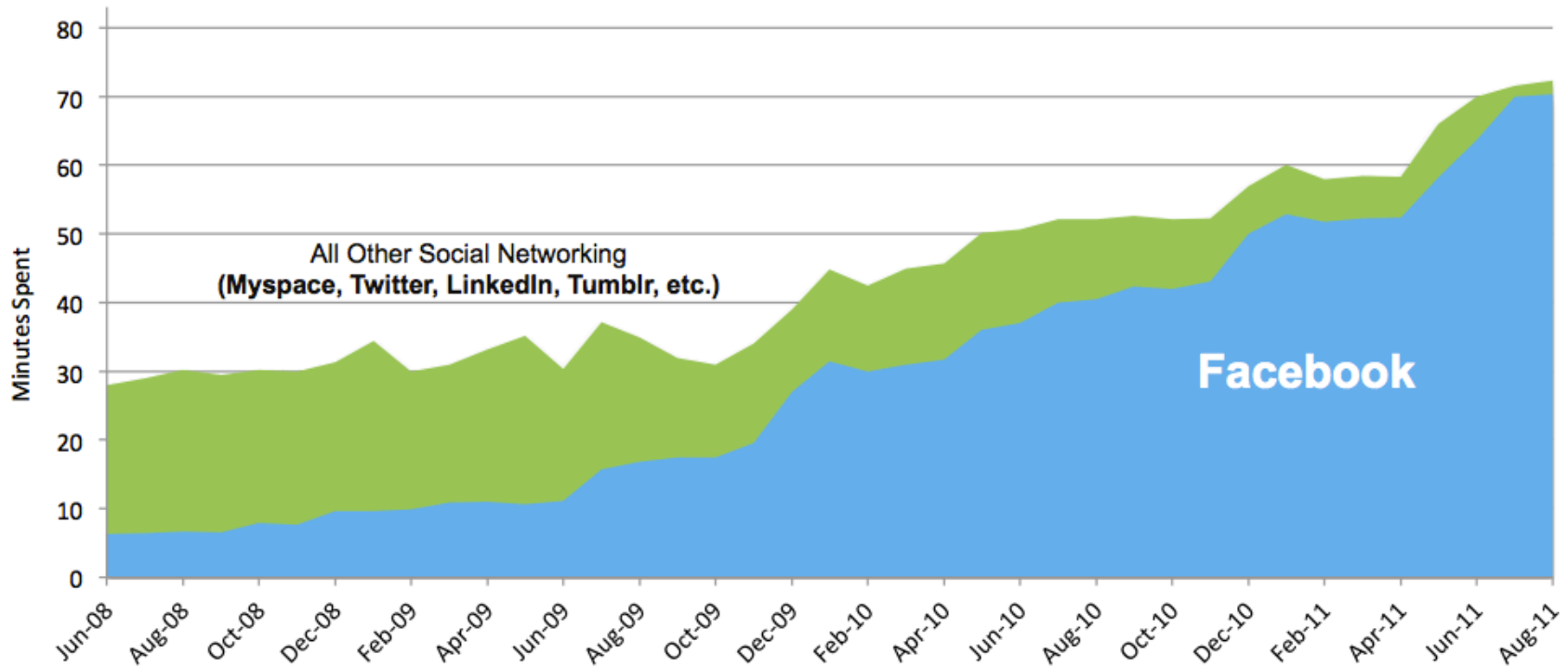
% of online adults in each group who send or read email

	% of each group who ever send or read email	% of each group who send or read email on a typical day
All online adults	92%	61%
Gender		
Male	90	59
Female	93	64
Race/Ethnicity		
White	93	63
African American	87	48
Hispanic	88	53
Age		
18-29	94	64
30-49	91	63
50-64	91	61
65+	87	46
Education		
Some high school	90	39
High school	84	46
Some college	94	64
College graduate	96	77
Household income		
< \$30,000	86	47
\$30,000 - \$49,999	89	59
\$50,000 - \$74,999	94	67
\$75,000+	97	78

Source: The Pew Research Center's Internet & American Life Project, November 3-24, 2010 tracking survey. N=2,257 adults ages 18 and older. Interviews conducted in English and Spanish.

US Social Usage

Minutes Spent on Social Networks Each Month
(June 2008 – August 2011)

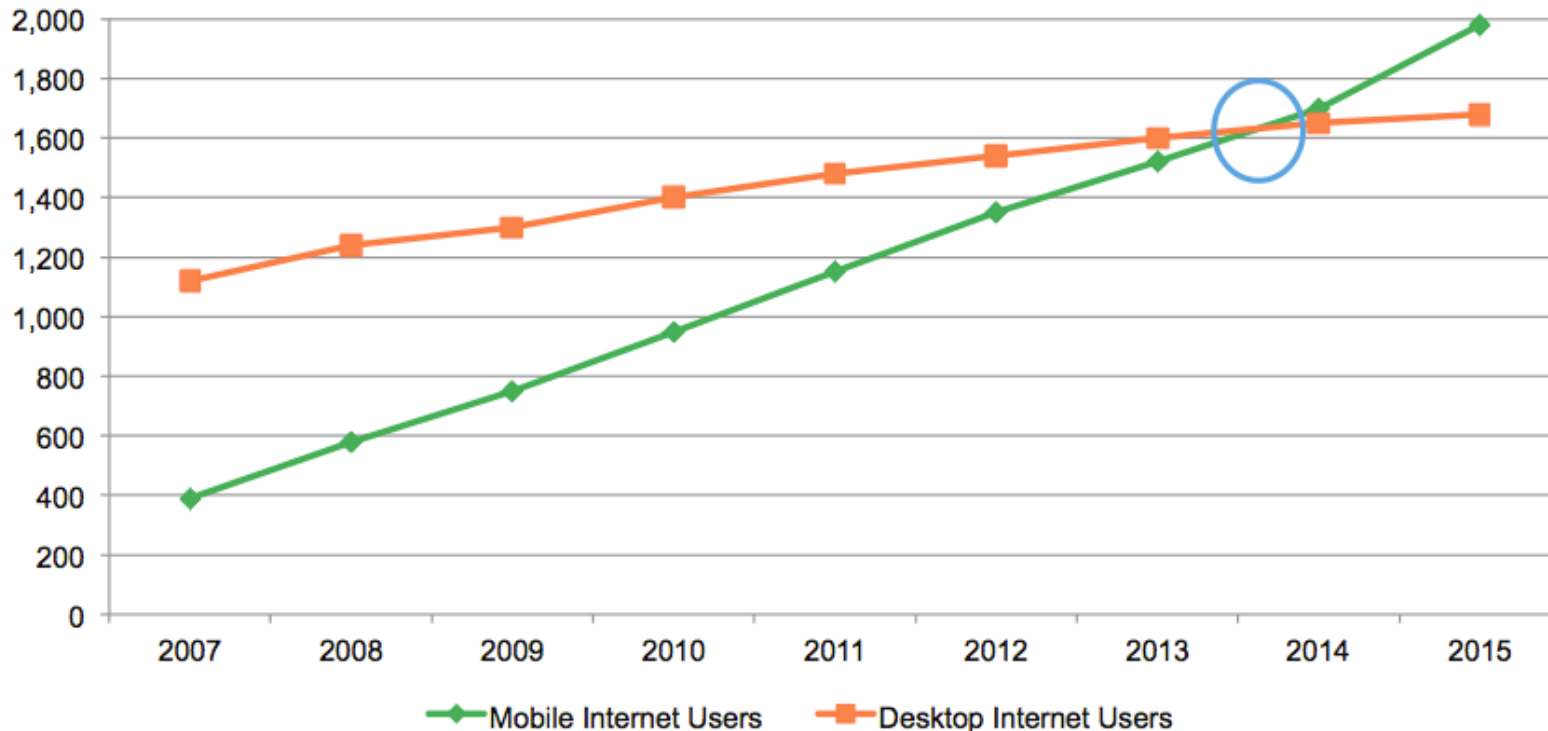


Source: comScore

Facebook Now Dominates Social Time Spent

Mobile Web Usage Growing

Forward Projection: Mobile Web Browsing vs. Desktop Web Browsing
(2007-2015)

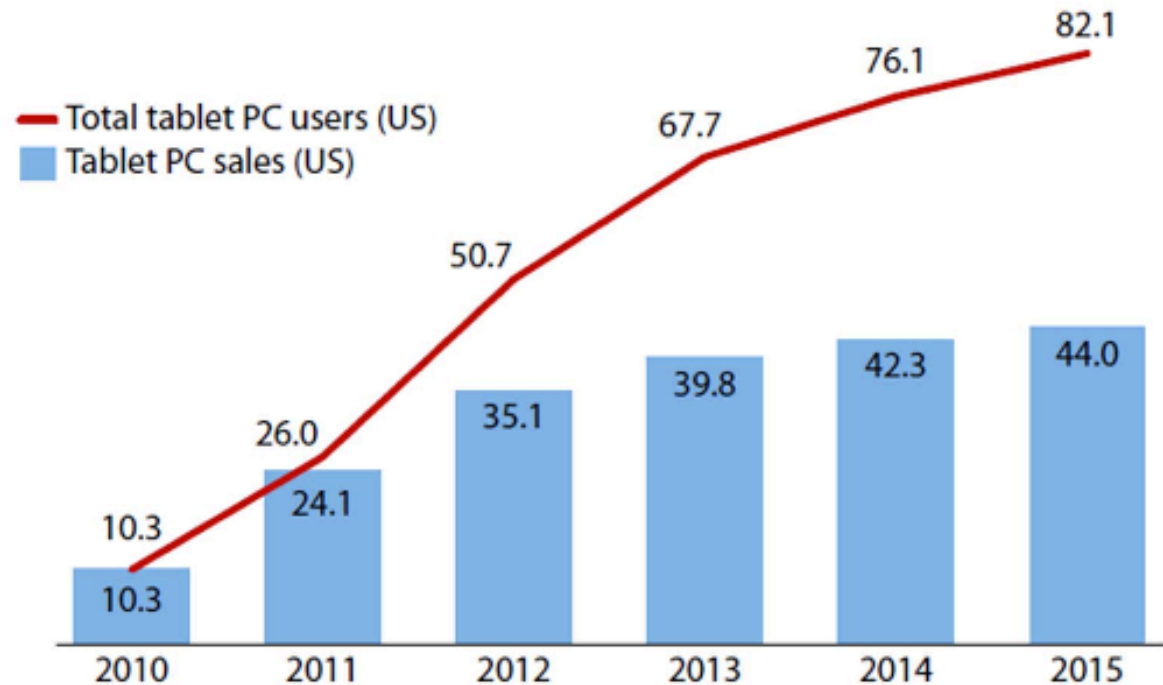


Source: Mary Meeker, Morgan Stanley, "Internet Trends," April 12, 2010

Mobile Web to Exceed Desktop Web in 2015

US Tablet Growth

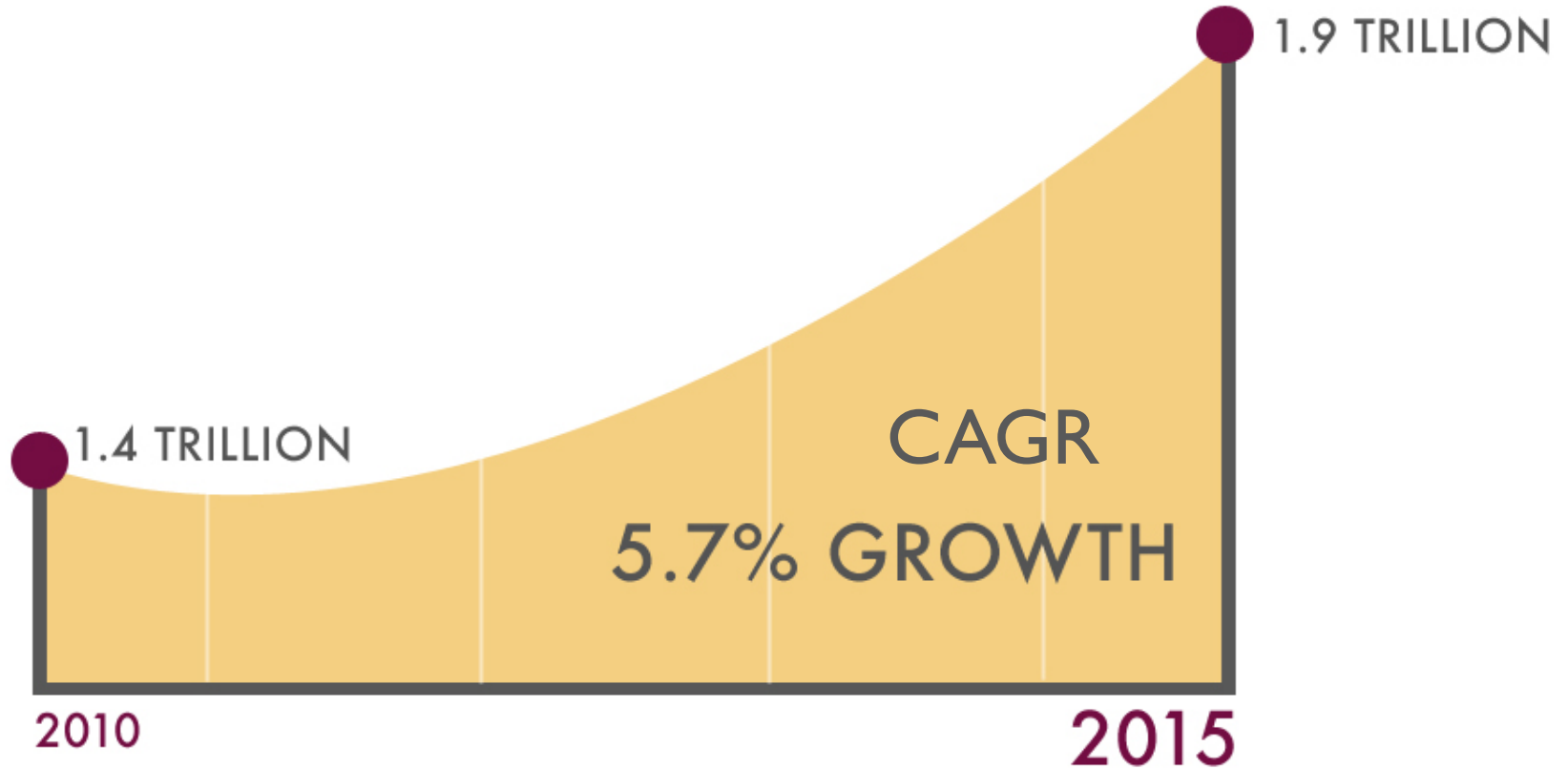
Forrester's US consumer tablet forecast, released Jan. 4, 2011:



Source: Forrester Research eReader Forecast, 2010 To 2015 (US)
Note: All numbers in millions of US adults

1 in 4 Americans Will Own a Tablet by 2015

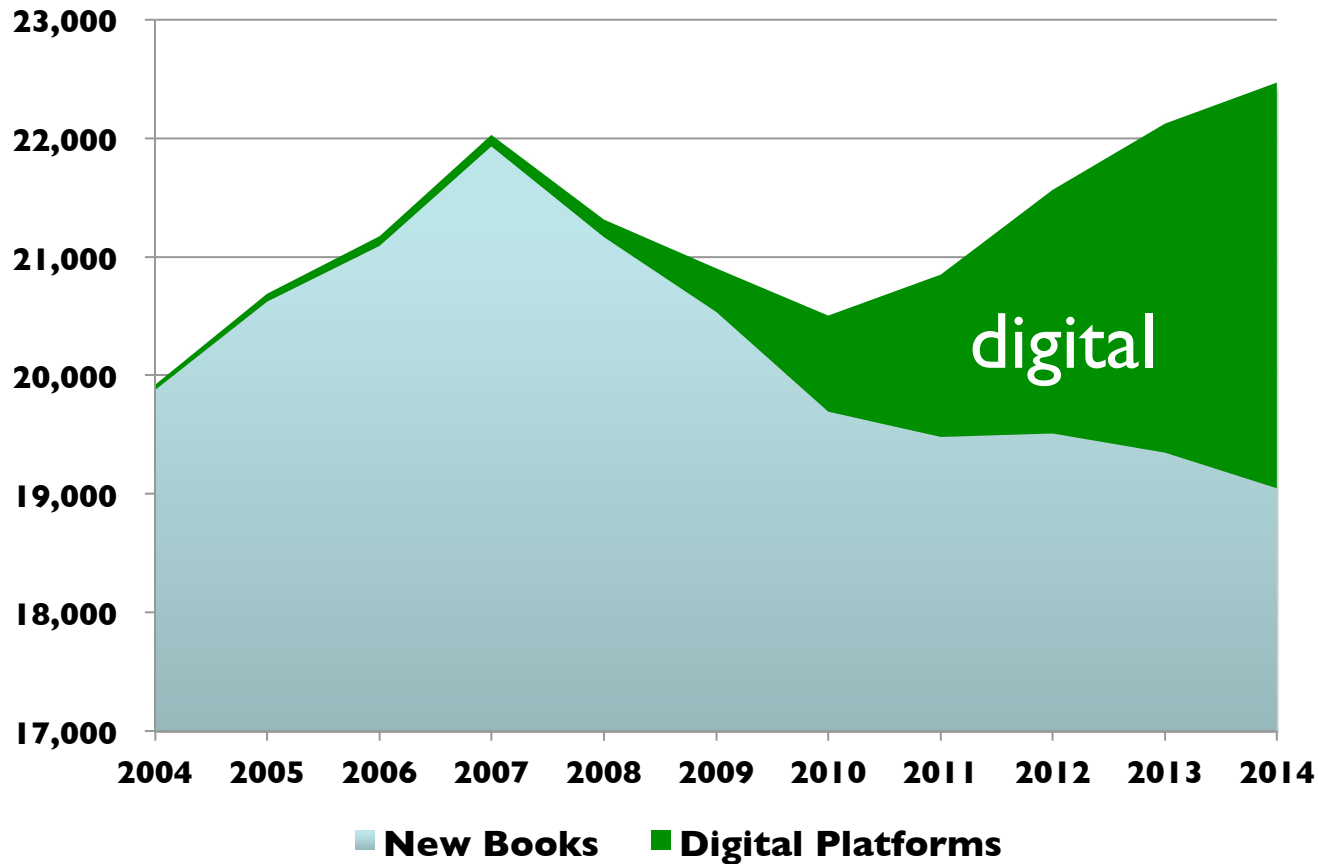
Consumer Spending on Content



Source: PwC Global Entertainment And Media Outlook

Digital Content and Tablets are Spurring Growth in Global Consumer Spending on Content

Consumer Spending on Books



Source: VSS Forecast 2010 Consumer Book Publishing

Digital Book Sales Spurred Industry Turnaround in 2010

amazon.com[®]

FOR EVERY

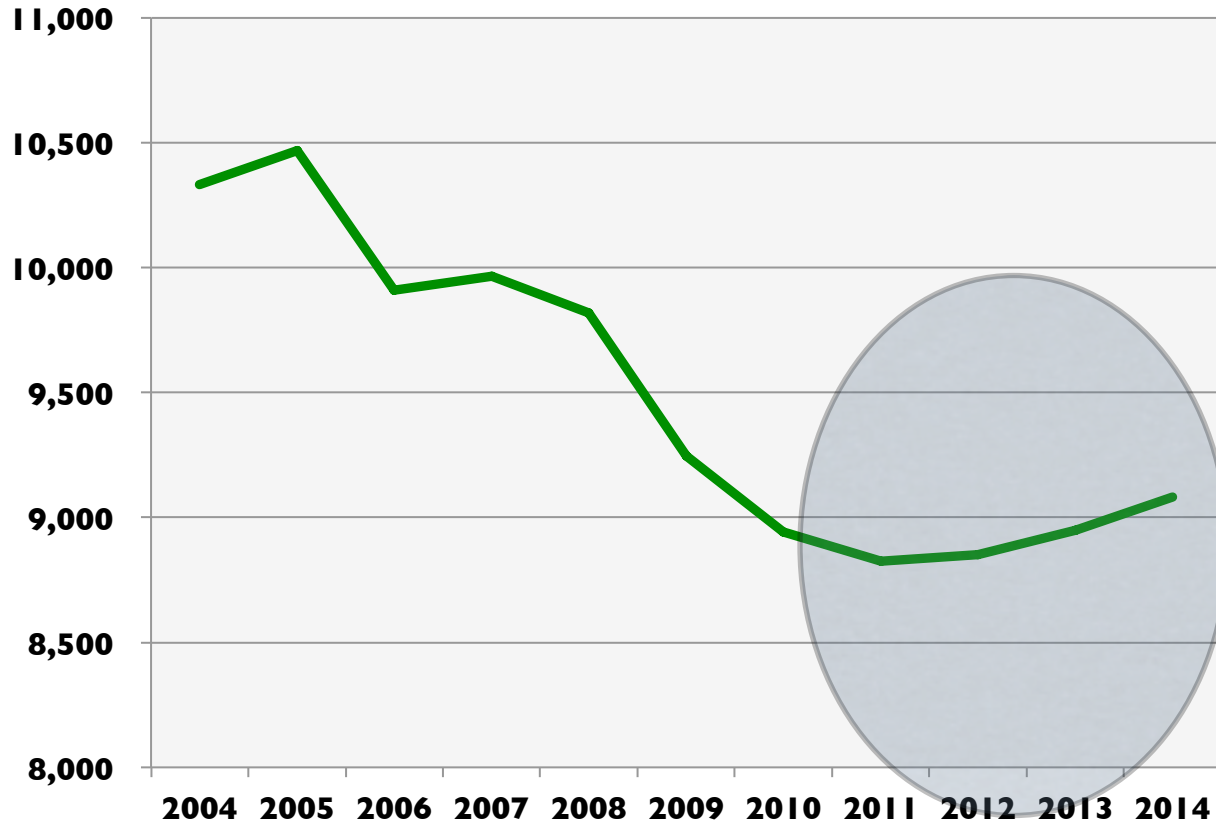
100 print books sold



105 kindle books sold



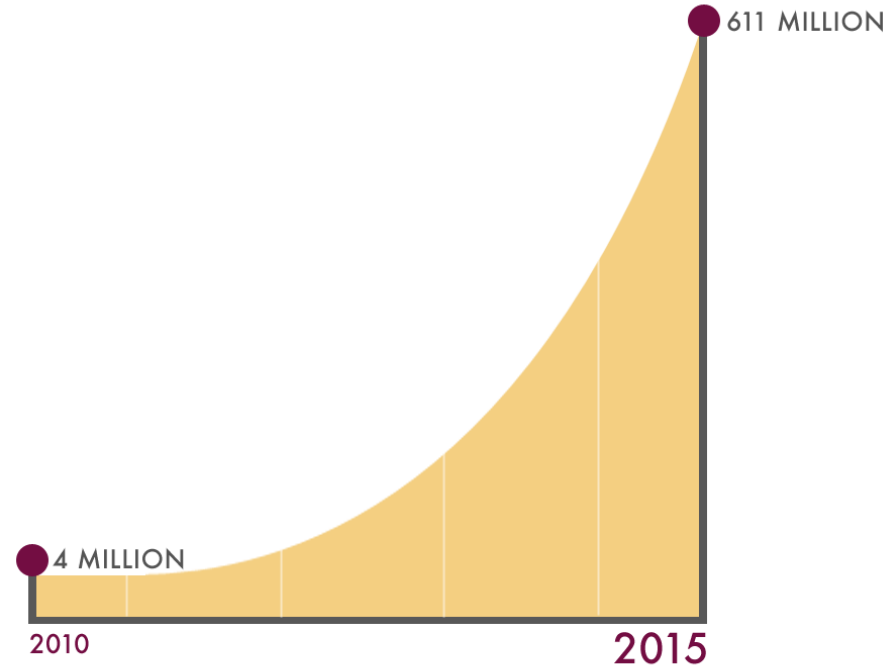
Consumer Spending on Magazines



Source: VSS Forecast 2010 Consumer Magazines

Industry Experts Predict a Magazine Industry Turnaround in 2012

Consumer Spending on Digital Magazines



Source: PwC Global Entertainment And Media Outlook

By 2015, Industry Experts Predict Consumer Spending on Digital Magazines Will Exceed 611M

Digital Magazine Retailers



amazon.com®

BARNES & NOBLE



While Book Industry Comeback Largely Powered by Amazon, Magazine Industry Turnaround Will Be Powered by Apple, Amazon, B&N, Zinio and Others

7 Pillars of Digital Publishing Success

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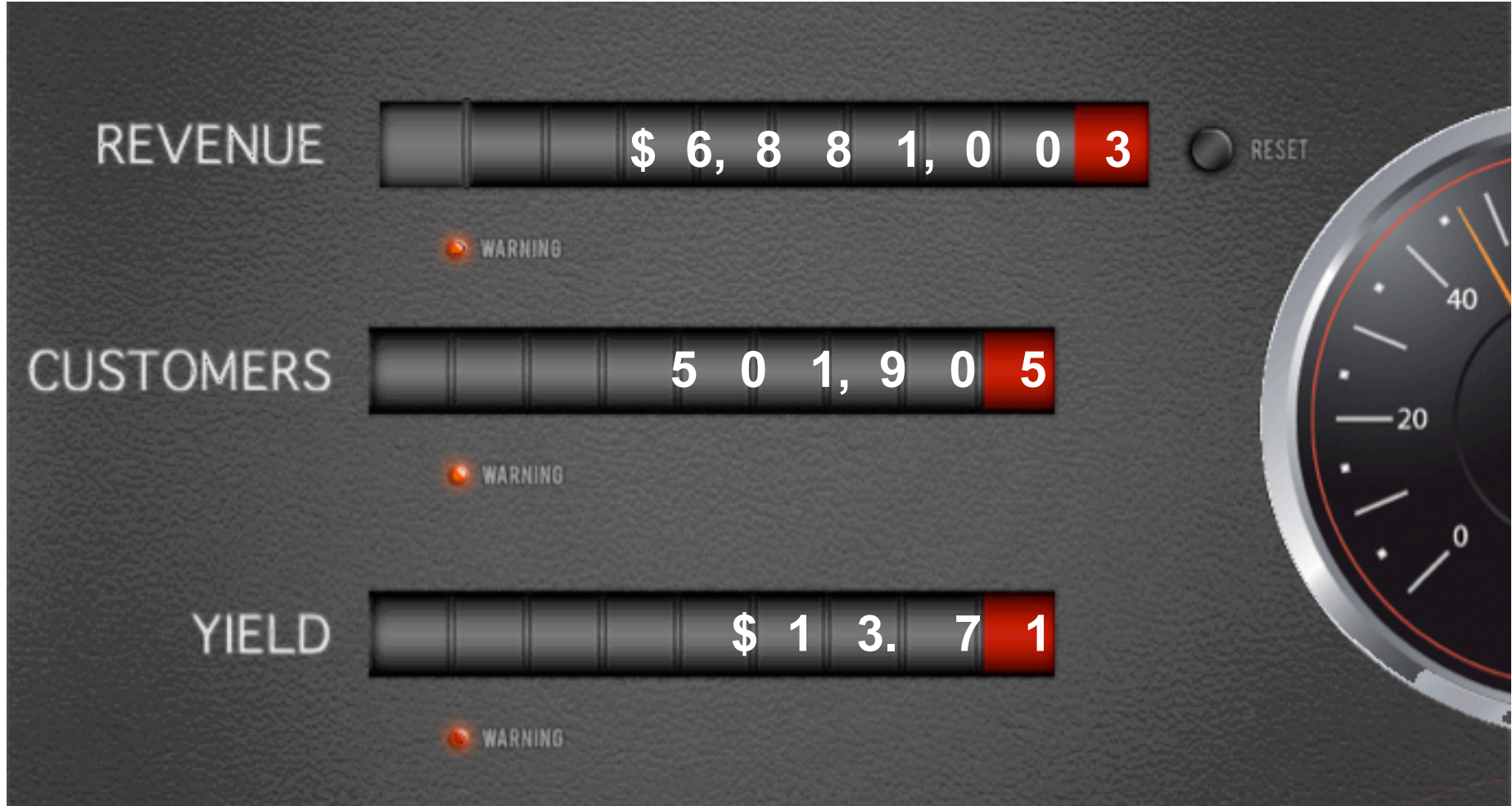
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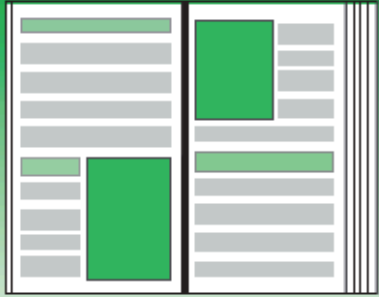

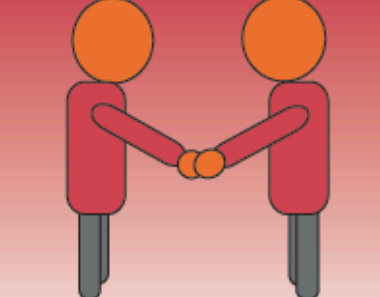
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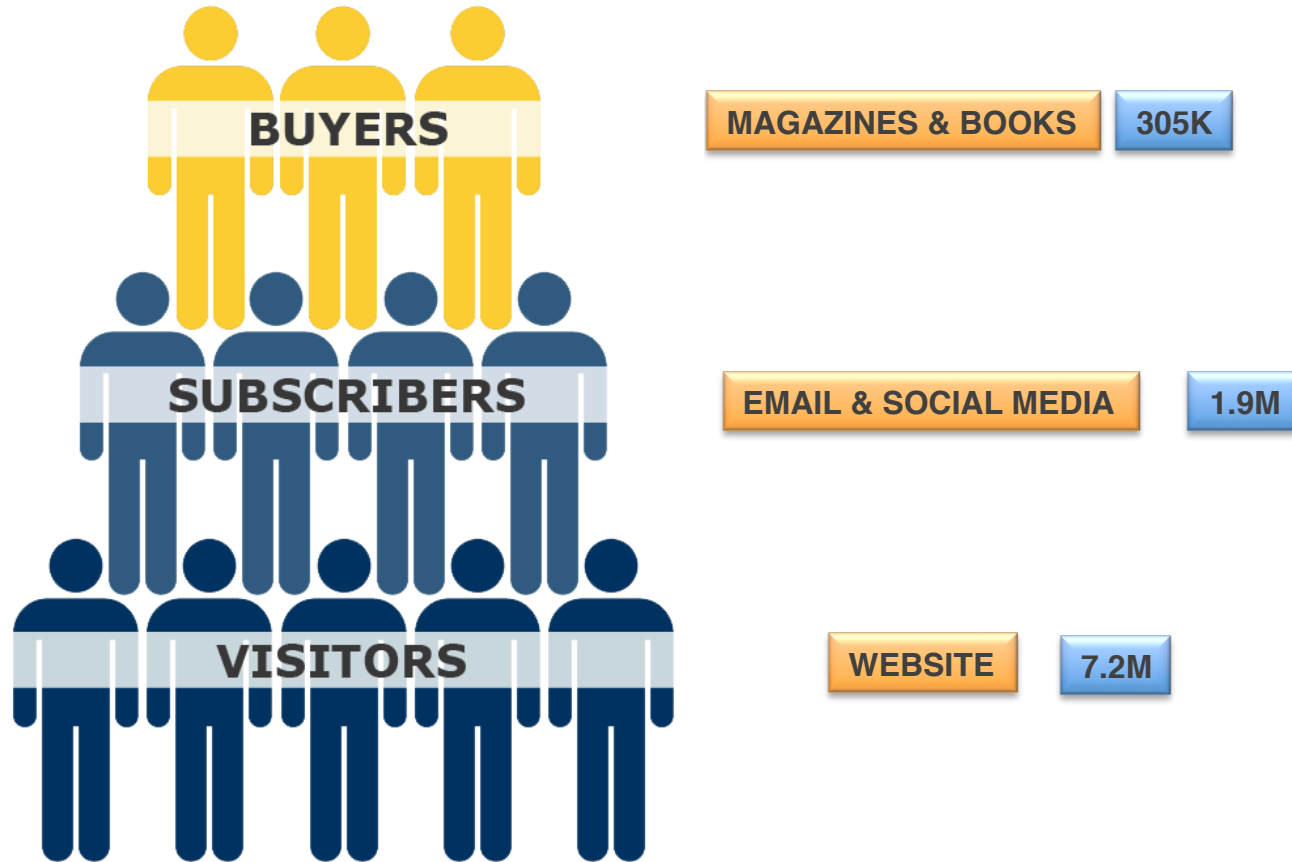


Content

SPECIAL-INTEREST MEDIA USER EXPERIENCE

	 OFFLINE	 ONLINE	 IN PERSON
MEDIUM	Books, CDs, DVDs Newsletters, Magazines	Email, Websites, Audio, Video	Conferences, Workshops, Consulting
CONVENIENCE	High	Moderate	Low
FIDELITY	Low	Moderate	High
OWNERSHIP	High	Moderate	Low

Flora Daily



Commerce



Findability



Shareability



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Digital Content Marketing

3-Step Marketing System

Digital Content Marketing 3-Step			
	Attract	Engage	Motivate
	Visitors	Subscribers	Buyers
Blog	✓	✓	✓
SEO	✓		✓
Email		✓	✓
Twitter	✓	✓	✓
Facebook	✓	✓	✓
RSS		✓	✓
Store	✓		✓

Mequoda Content Marketing Standards

CONTENT-DRIVEN



GOOGLE-FRIENDLY



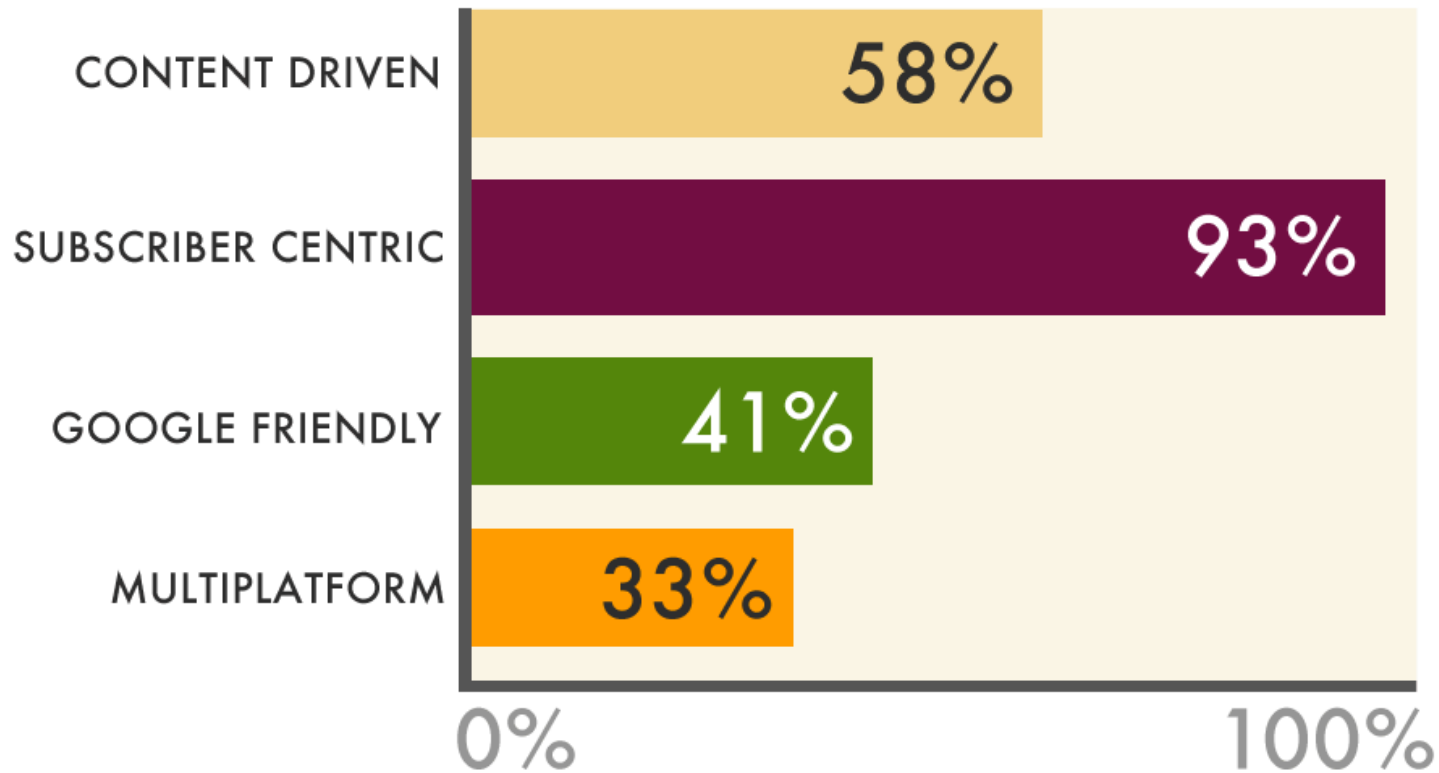
SUBSCRIBER-CENTRIC



MULTI-PLATFORM

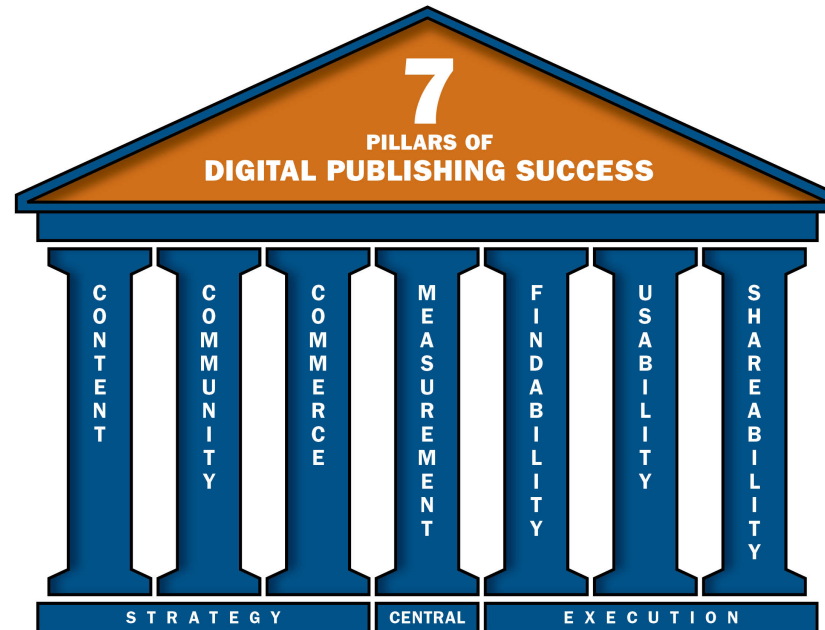


Mequoda Content Marketing Adoption Rate



Source: 2011 Mequoda 500 Study

Thank You



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