

A scene from the Harry Potter movies showing Harry Potter and Sirius Black in a grand hall. They are both leaning over a table, looking intently at a glowing crystal ball. Sirius is on the left, wearing his signature round glasses and a dark robe. Harry is on the right, with his characteristic red hair and a dark robe. The crystal ball sits on a small, ornate stand. In the background, other people in robes are visible, some sitting at tables with red cloths and white balloons. The lighting is warm and dramatic, typical of the film's aesthetic.

**Google**™

# The Future of Digital

**Orestis Andrianis**  
Senior Industry Analyst  
Travel & Domestic  
Google Inc.

## Quiz #1

How many times we check our mobile phones on average per day



◆ **A. 120 times**

◆ **B. 90 times**

◆ **C. 180 times**

◆ **D. 150 times**

## Quiz #2

**How many Google Searches are being done in Greece every week?**



**More than  
250 mln!**

What is digital?

Humans are much more informed and educated

**JUST GOOGLE IT.**





# 16 year old Jack Andraka finds cure for cancer



OUT

8-year old Evan becomes millionaire



# Julius Yego goes to London Olympics with YouTube javelin lessons







# Technology has transformed industries

**1900 – 83% Farming**



**2011 – 2% Farming**



# Digital Transformation is the 3<sup>rd</sup> Industrial Revolution



# Remember these companies?

**COMPAQ**

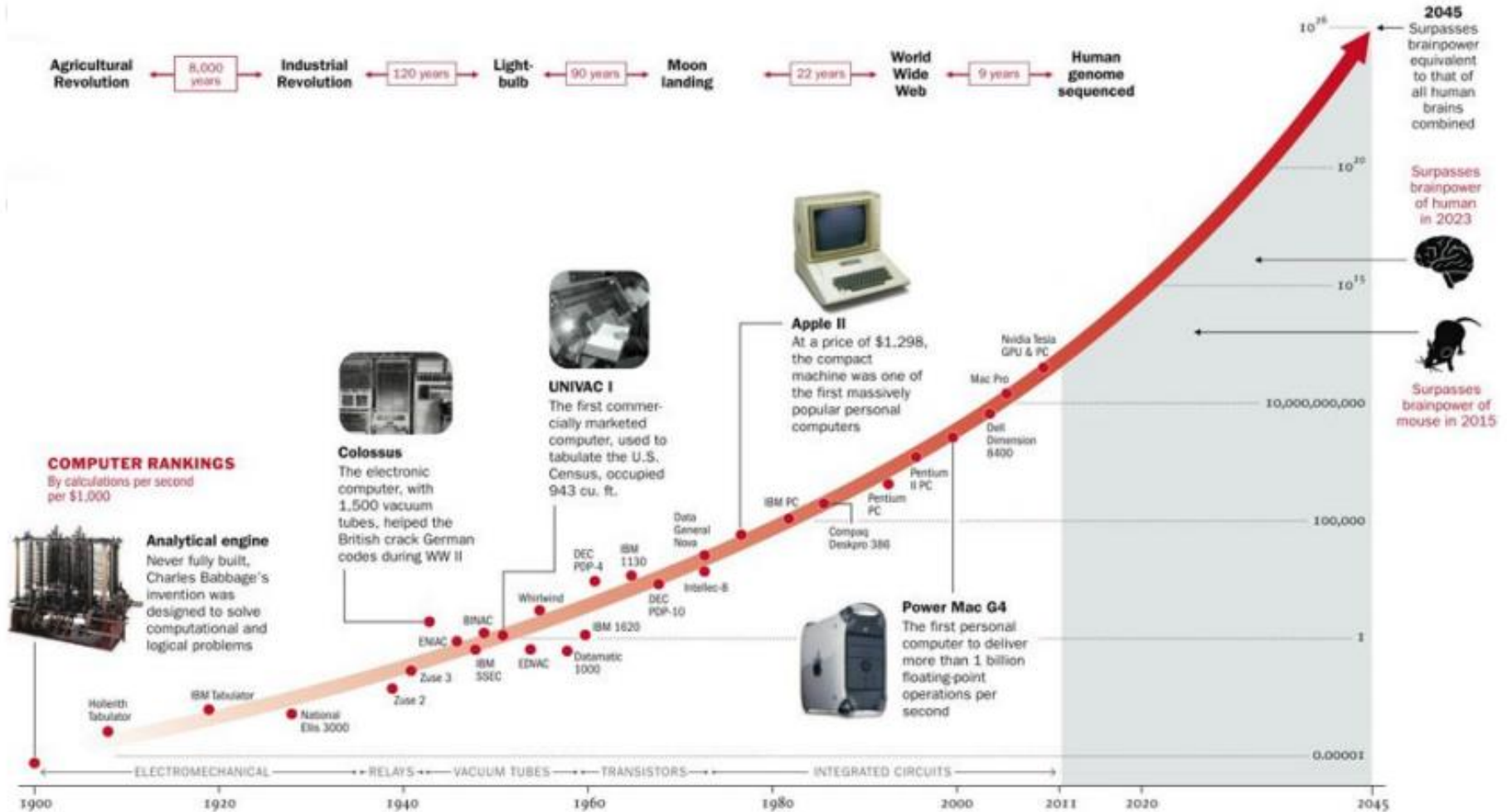


**NOKIA**





# Digital power will enable the 3 Industrial revolution



Everybody is talking about digital



# MEET THE CONNECTED CONSUMER

*How smartphones, tablets, and Facebook are changing the way people shop*

She's a **40-something woman.**

Despite what many may assume the average connected consumer is not a millennial.



**52%** of connected consumers are women with a mean age of 40.

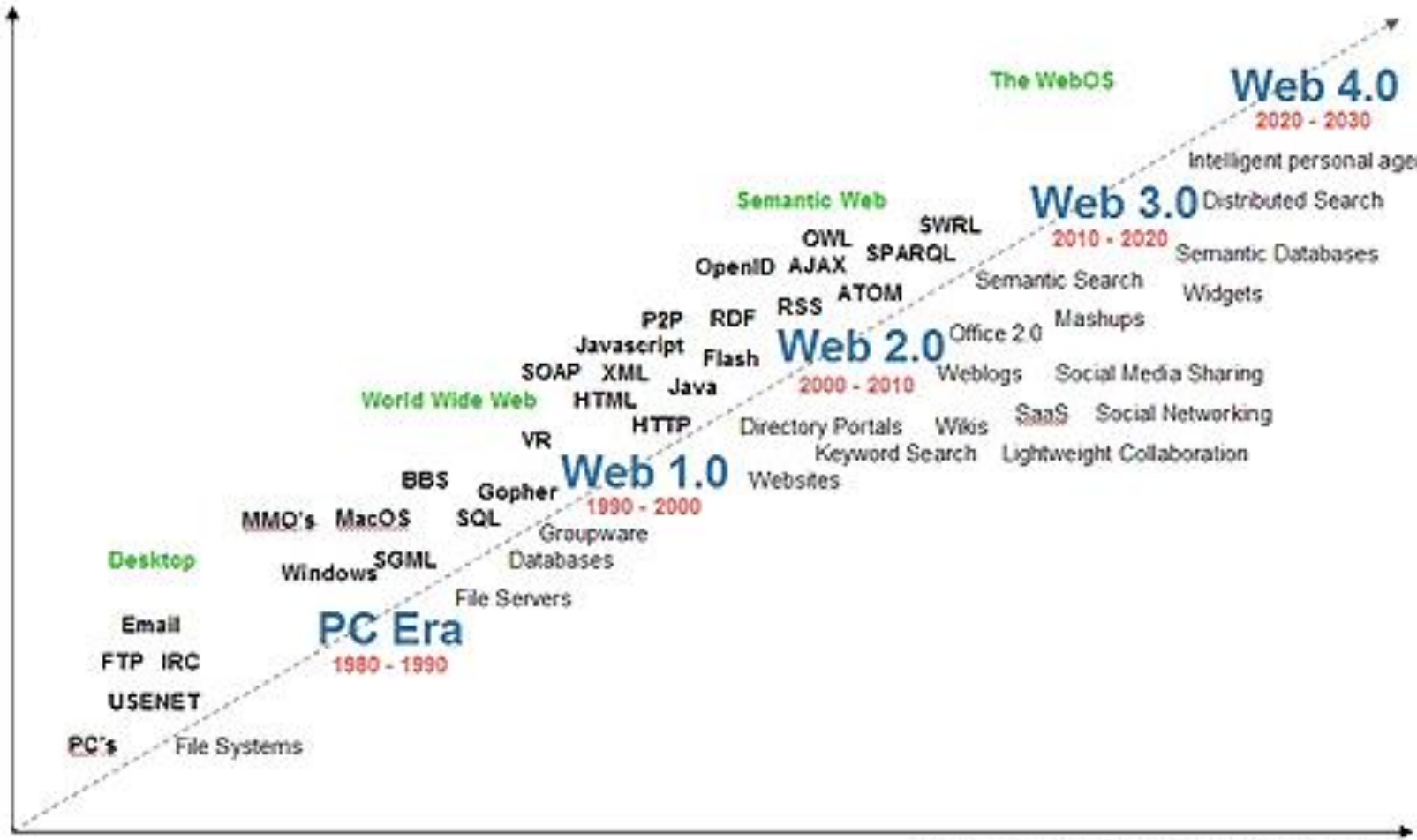
They have a mean household income of **\$63,000.**







Semantics of Information Connections



Semantics of Social Connections



Source: Radar Networks & Nova Spivack, 2007 - www.radarnetworks.com

# Social Marketing Hierarchy



Except for the consumers

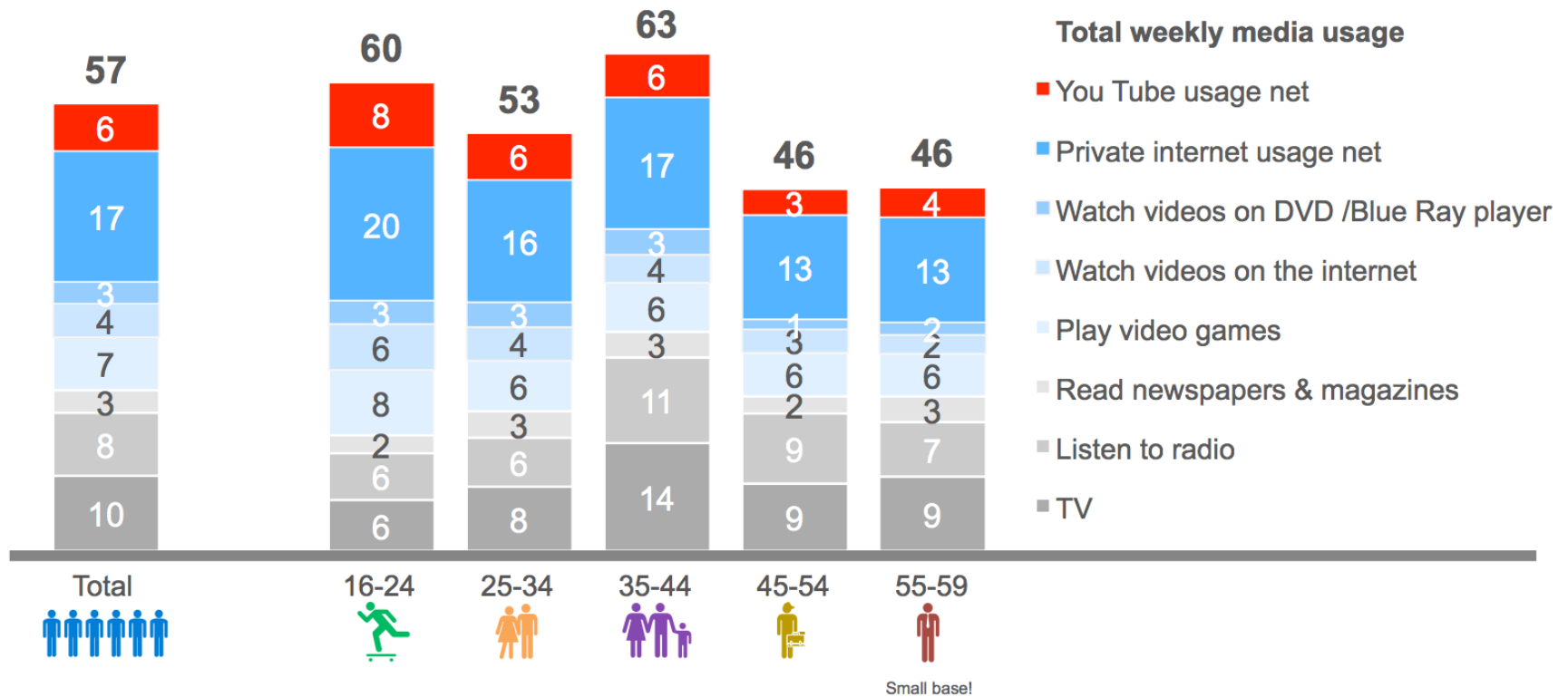


***I don't care!***



For them it is simple  
Digital is life

# Weekly media budget for Internet users



Q20: And now please think about the time you spent on each media in the past week. Please estimate how many hours you used the respective media.

Base (weighted): YT users Total n=854; 16-24 n=222; 25-34 n=222; 35-44 n=269; 45-54 n=108; 55-59 n=32

So, what is next?



**5 billion**  
internet users worldwide



**10 billion**  
mobile subscriptions



**53 zettabytes**  
of digital information in the world --  
videos, photos, music, texts, etc.

# 1 Zettabyte

1,000,000,000,000,000,000



# 4 Key Trends for the future



**Mobile**



**Connected World**

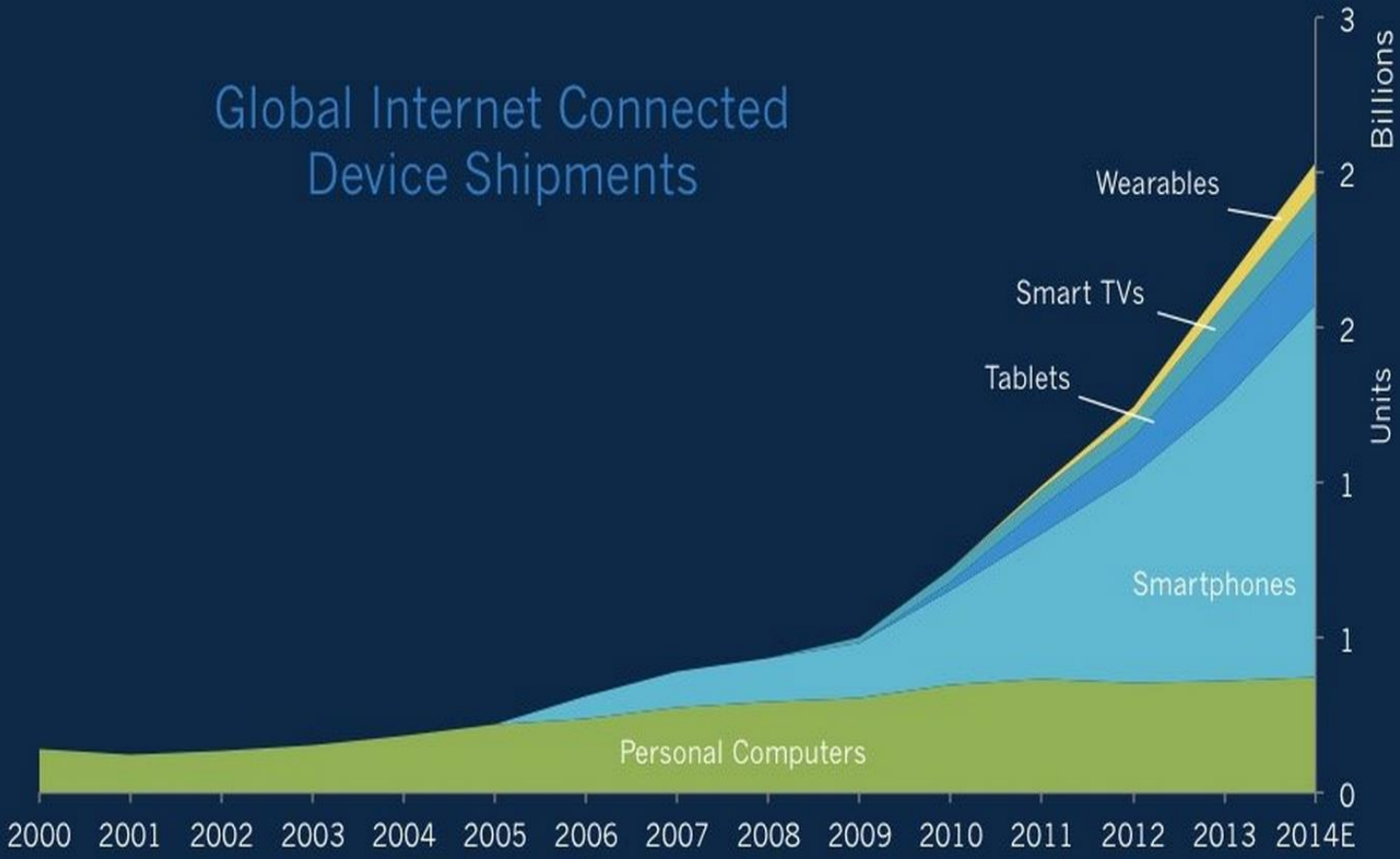


**Consumers in control**



**Commerce**

# PCs vs Mobile Devices Sales



BI INTELLIGENCE



The World

Without

Mobile...





MOBILE GAMING



**70-80%**

of all mobile downloads  
are games.



**\$54 Billion**

The mobile gaming  
industry is predicted to  
reach \$54 billion by 2015.



**84%**

of tablet owners  
play games.



**140 Million**

The number of times Angry Birds has been downloaded.

NOT  
SOUNDING  
LIKE A  
PHONE





# The world is connected

2009		2014	% Change
1.5B	Global internet users	3B	+100%
30%	Americans get news online daily	50%	+67%
47%	Americans pay bills online	74%	+57%
\$130B	US Ecommerce	\$224B	+72%
1B	YT views per day	7B	+600%
20	Hours video uploaded to YouTube per minute	100	+400%
300M	Facebook users	1.3B	+430%
2.5M	Tweets per day	500M	+19,900%
0	Pinterest unique users per month	65M	

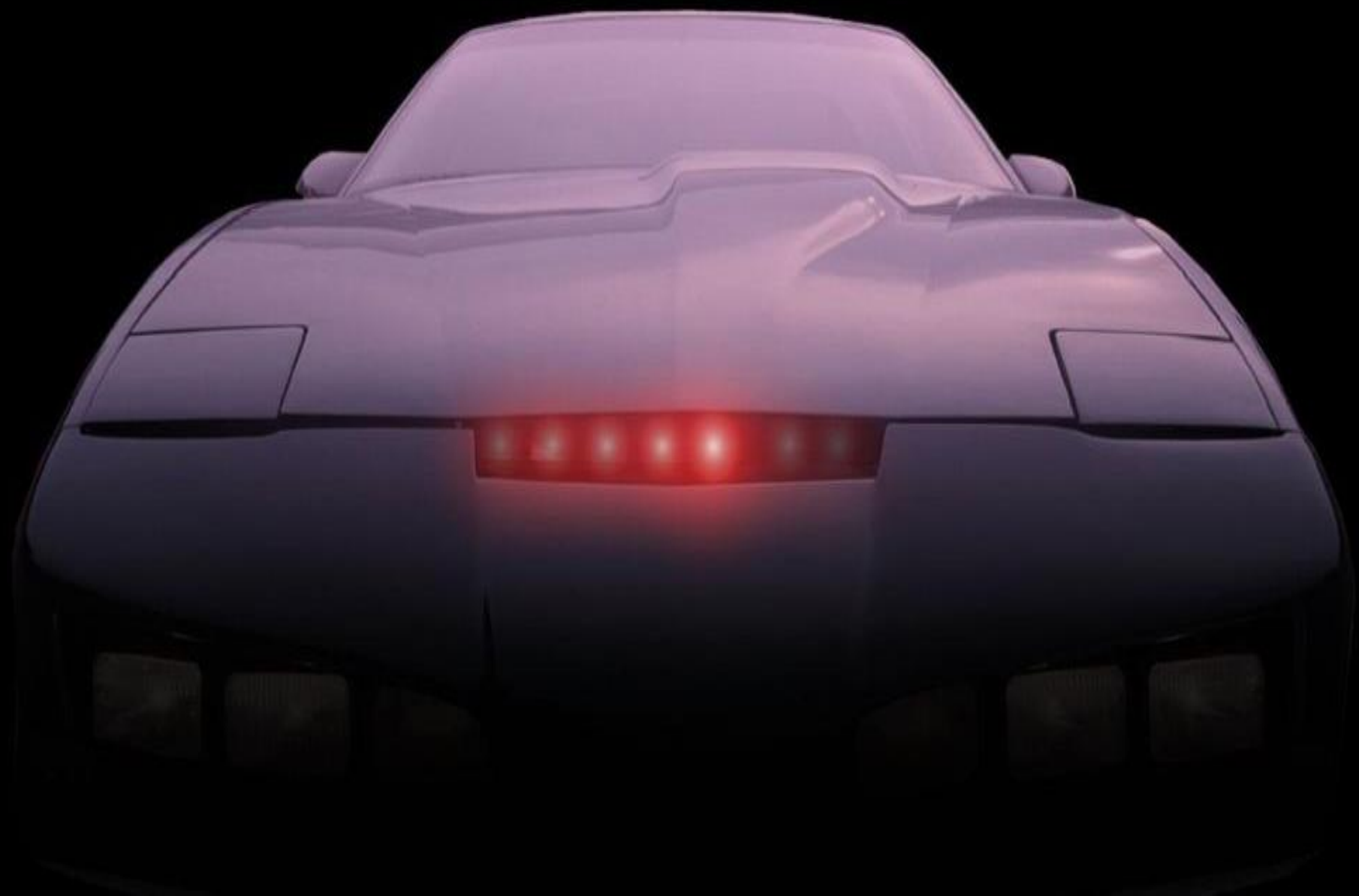
# TV is now connected



# Your home will be completely connected













Offline life goes online



# Project Jacquard



# The Economist

APRIL 24<sup>th</sup>-30<sup>th</sup> 2005

www.economist.com

What next for social conservatism?

PAGES 14 AND 27

Paul Volcker's UN torture

PAGES 12 AND 29

Wall Street's titans in trouble

PAGE 65

Islam, tolerance and the Dutch

PAGES 24-26

# Power at last

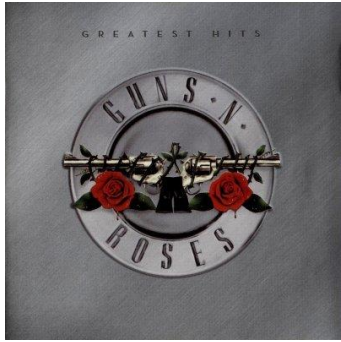
## How the internet means the consumer really is king (and queen)

14-PAGE SPECIAL REPORT



Argentina	14.50	Canada	6.95	Germany	4.95	Spain	4.75
Australia	6.00	France	5.50	India	15.00	UK	3.50
Brazil	12.00	Italy	5.50	Japan	15.00	USA	4.95
China	12.00	Malaysia	5.50	Peru	15.00	Worldwide	6.00
India	15.00	Philippines	5.50	South Africa	15.00		
Japan	15.00	Singapore	5.50	USA	4.95		
Malaysia	5.50	Taiwan	5.50				
Philippines	5.50						
South Africa	15.00						
Singapore	5.50						
Taiwan	5.50						
USA	4.95						
Worldwide	6.00						

# Consumers have choices



# Today, the media landscape has changed





# Today's challenges require a new approach

yesterday

today

the right person



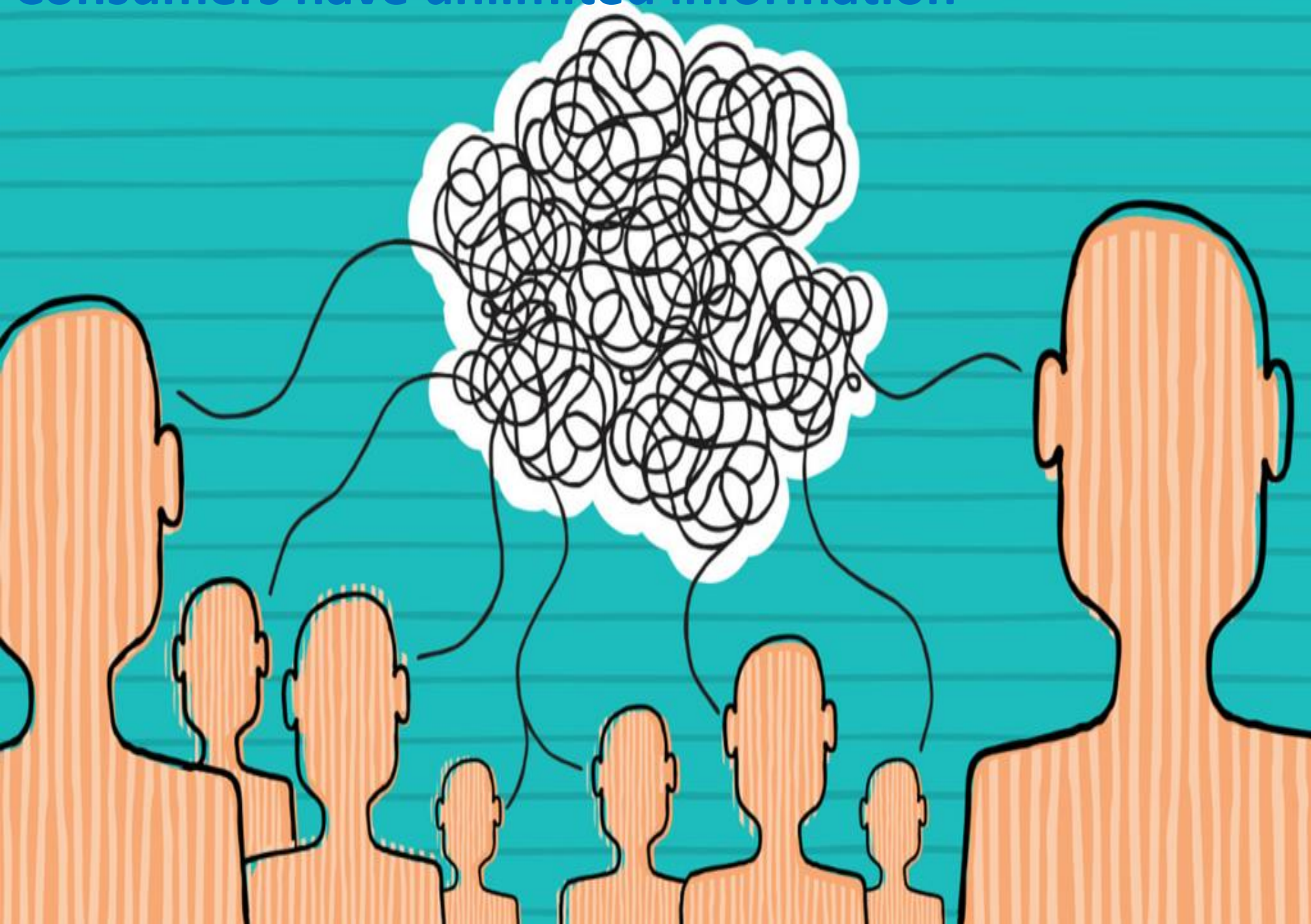
the right time



the right product

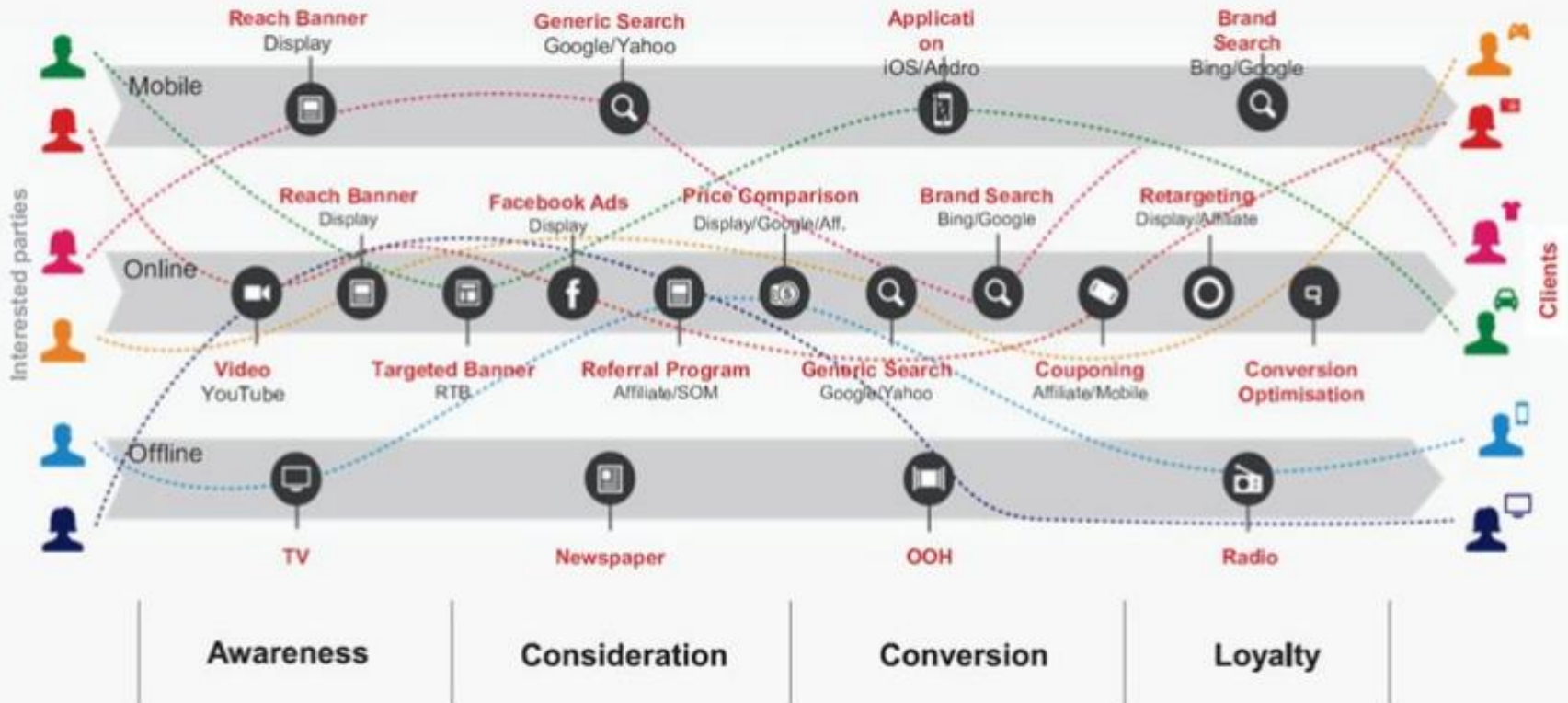


# Consumers have unlimited information

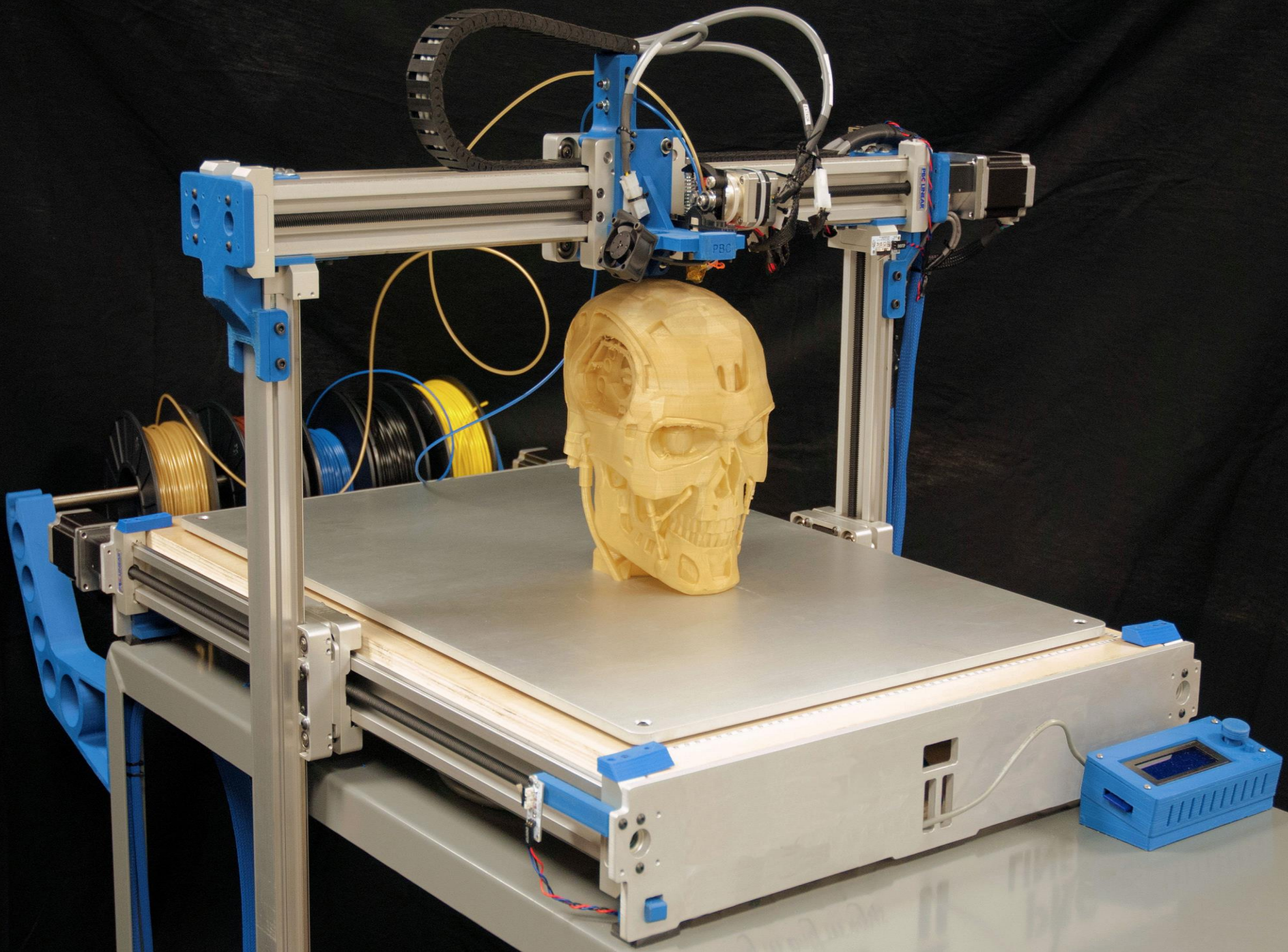




# Customer journey is getting complex



Marketing is no longer about single channels and tools





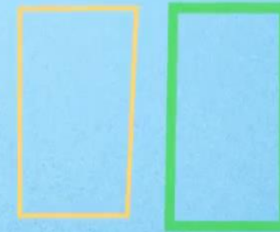
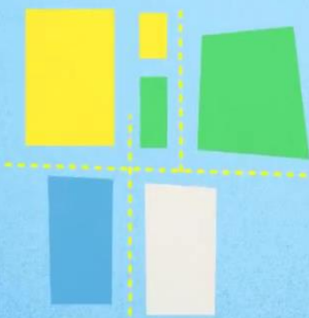
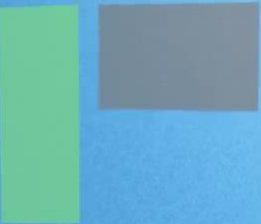
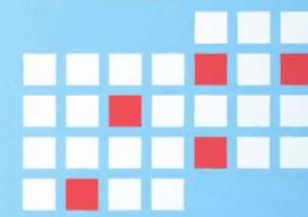
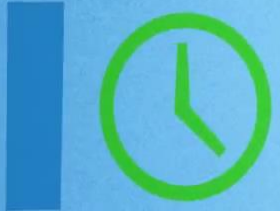
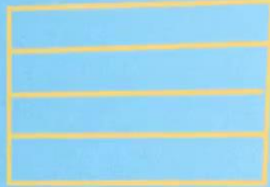
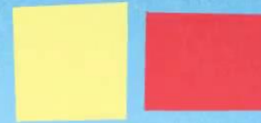
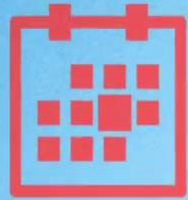
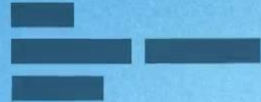


**NOT impossible**  
**PROJECT DANIEL**

# Personal Doctors









A market of individuals



# Today's consumer

Connected

Interested

Engaged

There's no denying that consumers are demanding more tailored experiences when interacting with companies than ever before.

-emarketer





## [*proh-gruh*-mat-ik]

Using technology and audience insights to automatically buy and run a campaign in real time -- reach the right user with the right message.

# Path to purchase forever changed

**78%**

of all purchase decisions are made before arriving at a store (up 16 points in 5 years)

**42%**

of retail sales that were online or web influenced in 2012

**22%**

of shoppers seeking info from a retailer website in the path to purchase



Shopping is changing





# TESCO

Helping you spend less every day

24 hrs

Welcome to Tesco Express





Facial recognition

Contactless payments

Minority report

Smart labels

On-demand delivery

# The future of shopping



video recognition



i-tag



3D Printing

Digital changing room

Virtual stores

3D printing shop

Robotic assistants

Back to the future

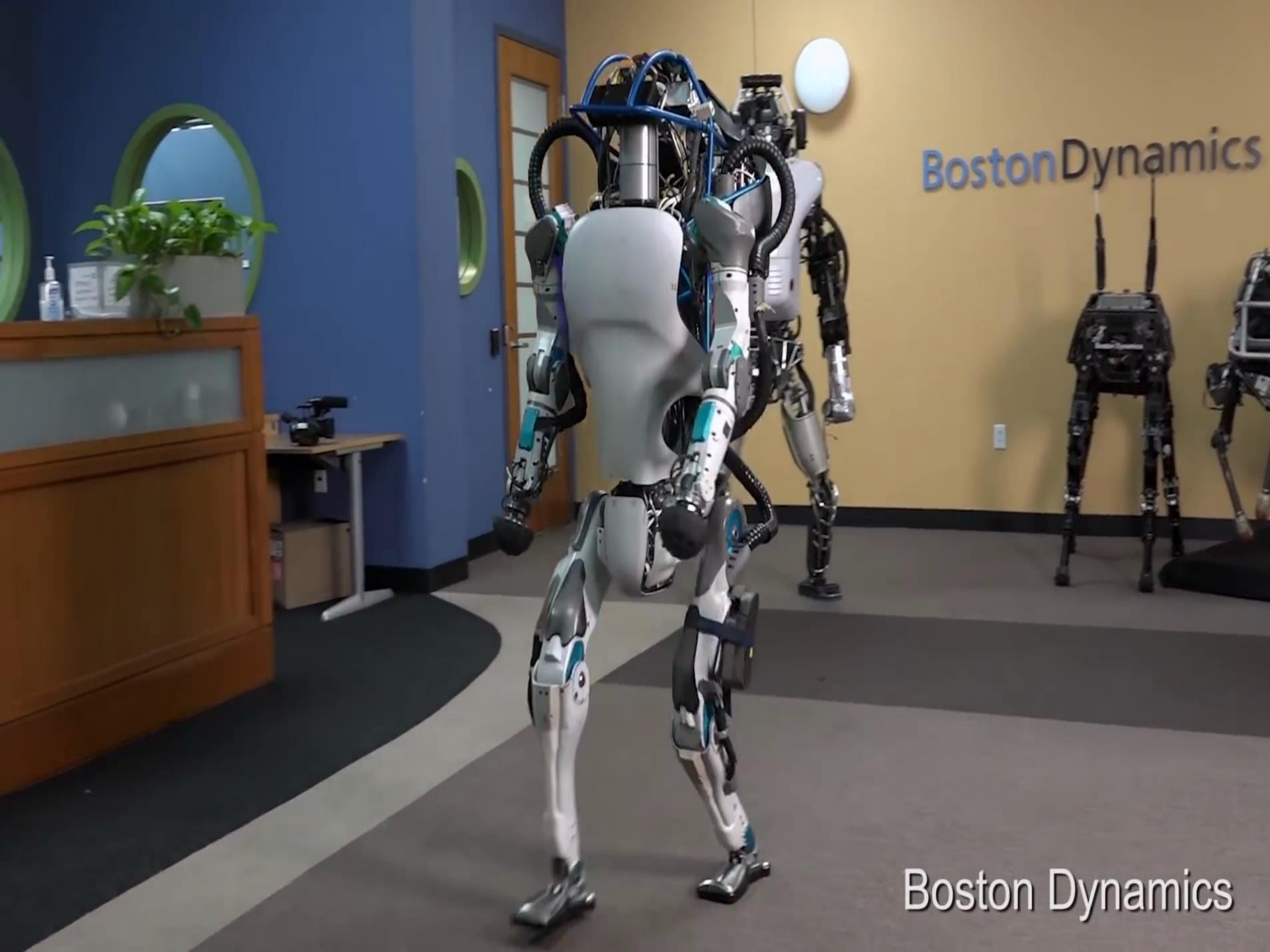
Boutique

Getty Images



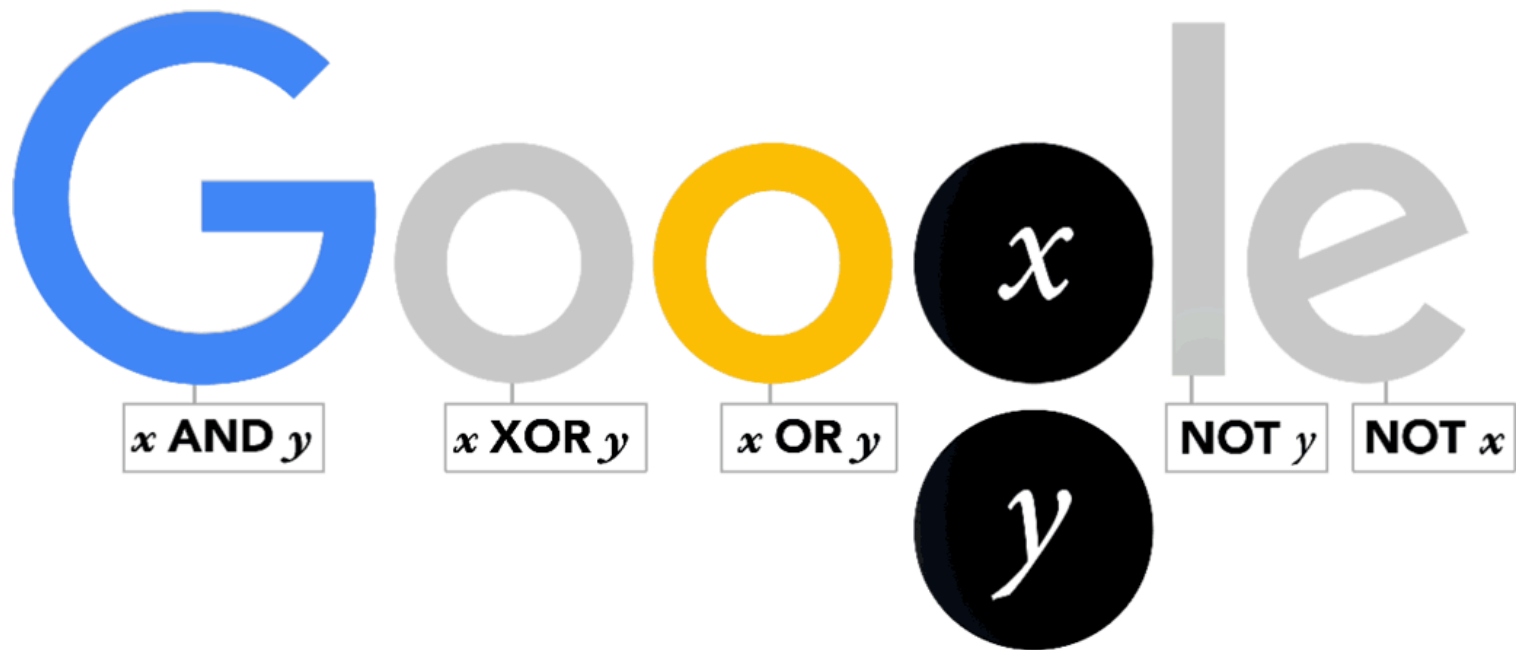
 **CNBC**





Boston Dynamics

Boston Dynamics



Thank you!