

Message

From: Jerry Dischler [Redacted@google.com]
Sent: 12/20/2018 8:54:29 PM
To: Donald Harrison [Redacted@google.com]
CC: Joan Braddi [Redacted@google.com]; Philipp Schindler [Redacted@google.com]; Kristen Gil [Redacted@google.com]; Carlos Kirjner [Redacted@google.com]; Chris Rhyu [Redacted@google.com]; Mike Roszak [Redacted@google.com]; Matthew Bye [Redacted@google.com]; Ruth Porat [Redacted@google.com]; Kent Walker [Redacted@google.com]
Subject: Re: Tim Briefing Feedback

Don, thanks for the great notes. This seems like a super positive step forward and can't wait for the workstreams/follow-ups.

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- If we want a deep partnership with Apple it may make sense to "join forces" on the user privacy issue, potentially across web and apps.

==> Pros: This could be a useful forcing function for the partnership and signal to the market that our rivalry is in the past.

==> Cons: Our views are pretty far apart; we will each need to accept painful compromises.

Best,
-Jerry.

On Thu, Dec 20, 2018 at 12:05 PM Donald Harrison <Redacted@google.com> wrote:
Kent - let me know if you have any thoughts or advice on the matters discussed.

Very good conversation last night with Tim, Eddy, Peter. Meeting lasted almost 2 hours - good tone and conversation (becoming more open as it progressed). Peter, Eddy, and I participated for the first hour or so and then Tim and Sundar met privately. Two main topics - our slides and the political environment (and FB) - this was a somewhat sprawling discussion focusing on both companies' experiences with DC. Sundar also discussed our respective approaches to privacy in the follow on session.

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(not sure that is

completely accurate but not an issue we felt the need to debate) **Confidential** Tim's overall message to Google was "I imagine us as being able to be deep deep partners; deeply connected where our services end and yours begin and sees no natural impediment to us doing more together. Knows there is a past but doesn't feel encumbered by it and wants to figure out how we work more deeply together (and share information better - he stressed this a few times)." Very positive and I felt genuine on his part - but we can take this slowly and no regrets over how we have handled things to date (from Sundar).

In turn when discussing how to encourage search, Sundar spoke about the fact that this is what we do - people trust us to get this right and trust us with the content of what they are searching for - and weaved in them considering us building an app or other experience that people associate with us and connect to us (vs. flowing through siri/suggest). Tim listened but did not react to this specifically other than noting we had different strengths. Sundar also strongly stated that you send us queries and we do our best to answer these (and monetize) - always in good faith and because our incentives are aligned - please trust this.

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Rough Notes below (I was largely presenting so accept they are rough) - I'll think about takeaways and action items working with Joan and team and we will regroup in 2019. Thanks everyone (particularly Chris and Mike) for the work in pulling together the excellent briefing materials for this.

notes :

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- We are aligned, Sundar: we would love to see the iPhone numbers grow and will work in good faith to answer the queries you send us
- Tim: look at Mac vs. iPad. Is there something we can look at from Mac vs. Windows, and iPad vs. tablet. iPad is more like a desktop? Both revenue and queries, over time, per device.
- Windows is so big—and in developed world. Large installed base. So you may not see a demographic shift.
- Tim: Is the growth rate of searches on iPad slower than desktop growth rates. (Searches per device over time—iPad has been going down at a fairly steep level. Which intuitively doesn't seem right.) Choose some other activity in addition to search—maybe people are using phones in place of tablets.

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- Safari suggestions: We think this is a good opportunity to address—we found enough examples
- Our vision is that we work as if we are one company. There is reluctance on both parts about sharing things. It would be great to hurdle over that. We've been back in a good stead for awhile; build a Google app that really builds a great experience (Sundar). We could extend the term of the deal so you guys don't worry about it. It would be an additive thing from a query experience; decide to put a Google Search App in and do it for 20 years together; People are used to engaging with our brand if they have an intent to search

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- Apparently iPad queries are down significantly - Peter noted this was more Apple's issues than ours but it is front of mind for Tim
- Tim wants to understand query growth better overall (and specific areas of query growth - like commercial); wants to understand CPM performance and mixes; again this is really internally directed but Tim spent a lot of time on this and is digging in (and will be front of mind for Sundar meeting)
- Others in the room (Tim's Leads) discussed the massive information asymmetry between Google and Apple on search - i.e Google sees all of ours, all of theirs, and also understands Android while we only see a portion of theirs - unclear whether Tim will raise this but it was also a large topic of conversation

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