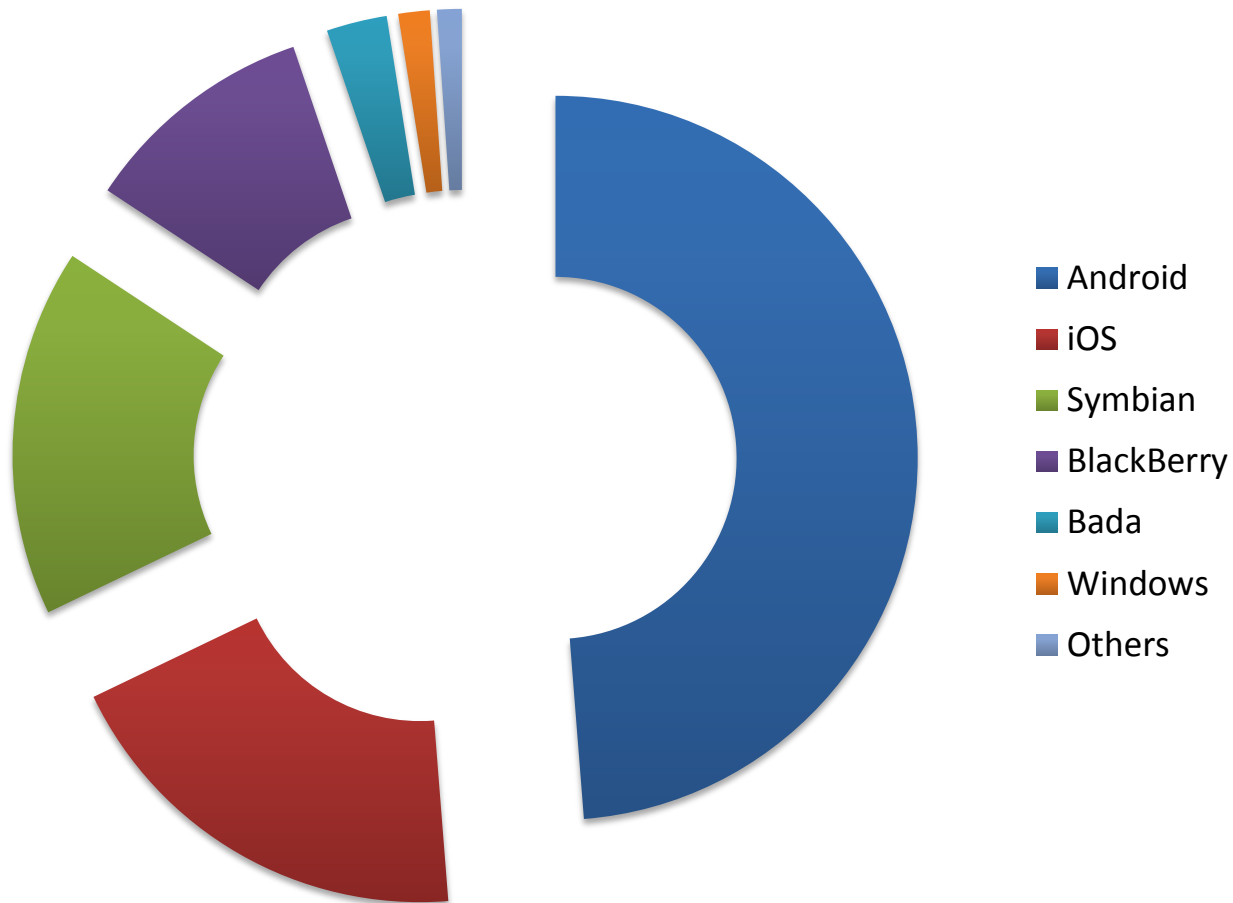




Android wins?

WW Unit Sales

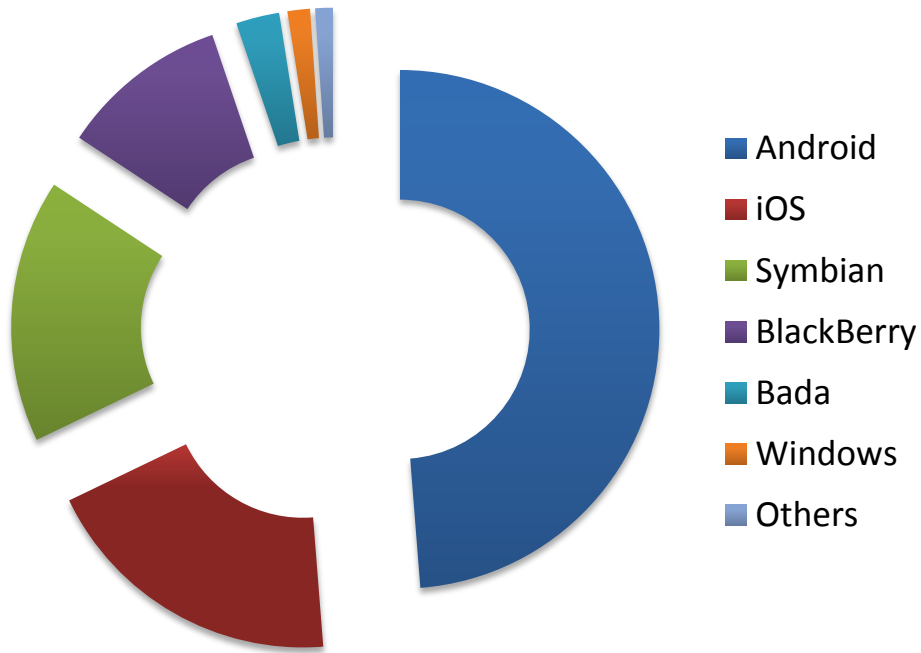


Source: Canalys

via: mobiThinking

Consumers buy Android, use Apple

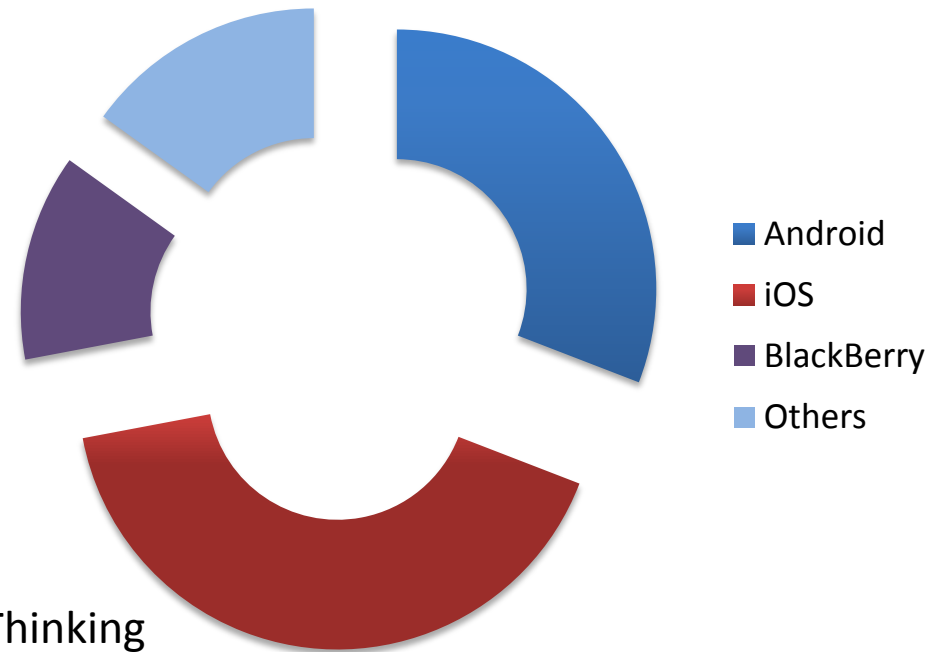
Unit Sales



Source: Canalys

3/26/2012

3G Handset Data Traffic



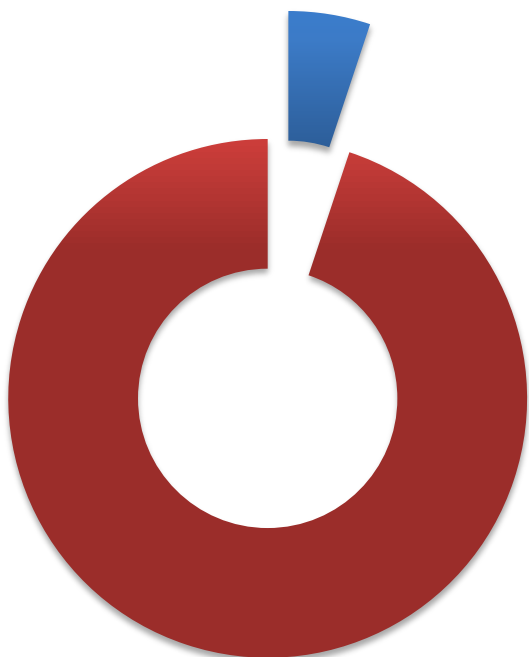
via: mobiThinking

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Tablets

Android for play, Apple for work

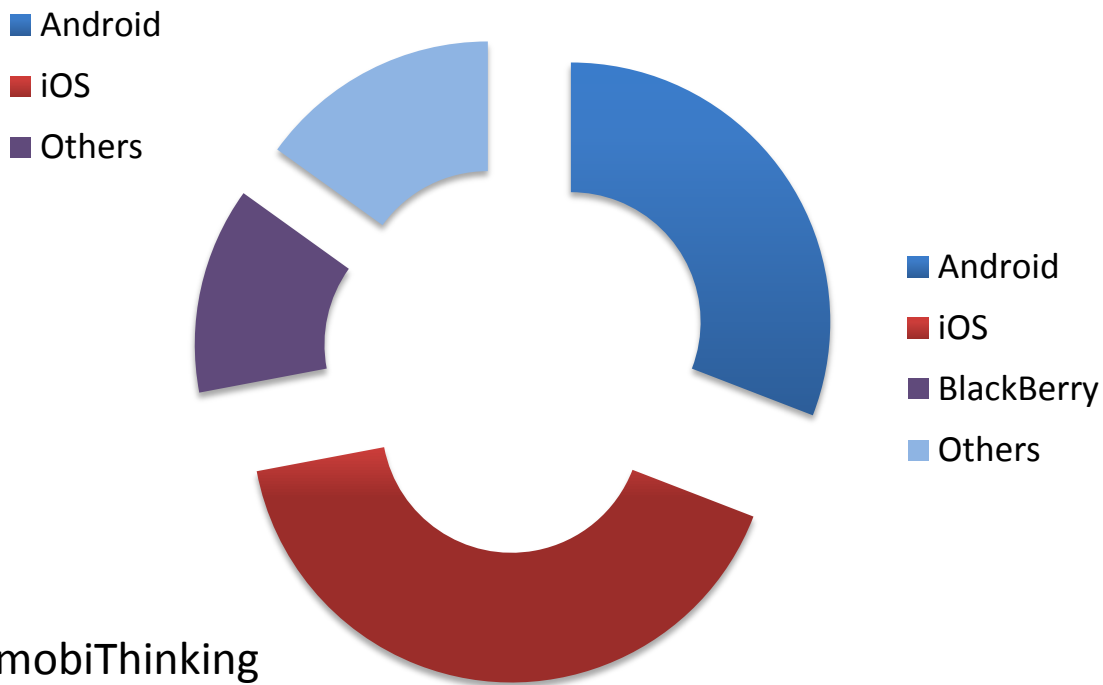
3G Tablet Data Traffic



Source: Canalys

3/26/2012

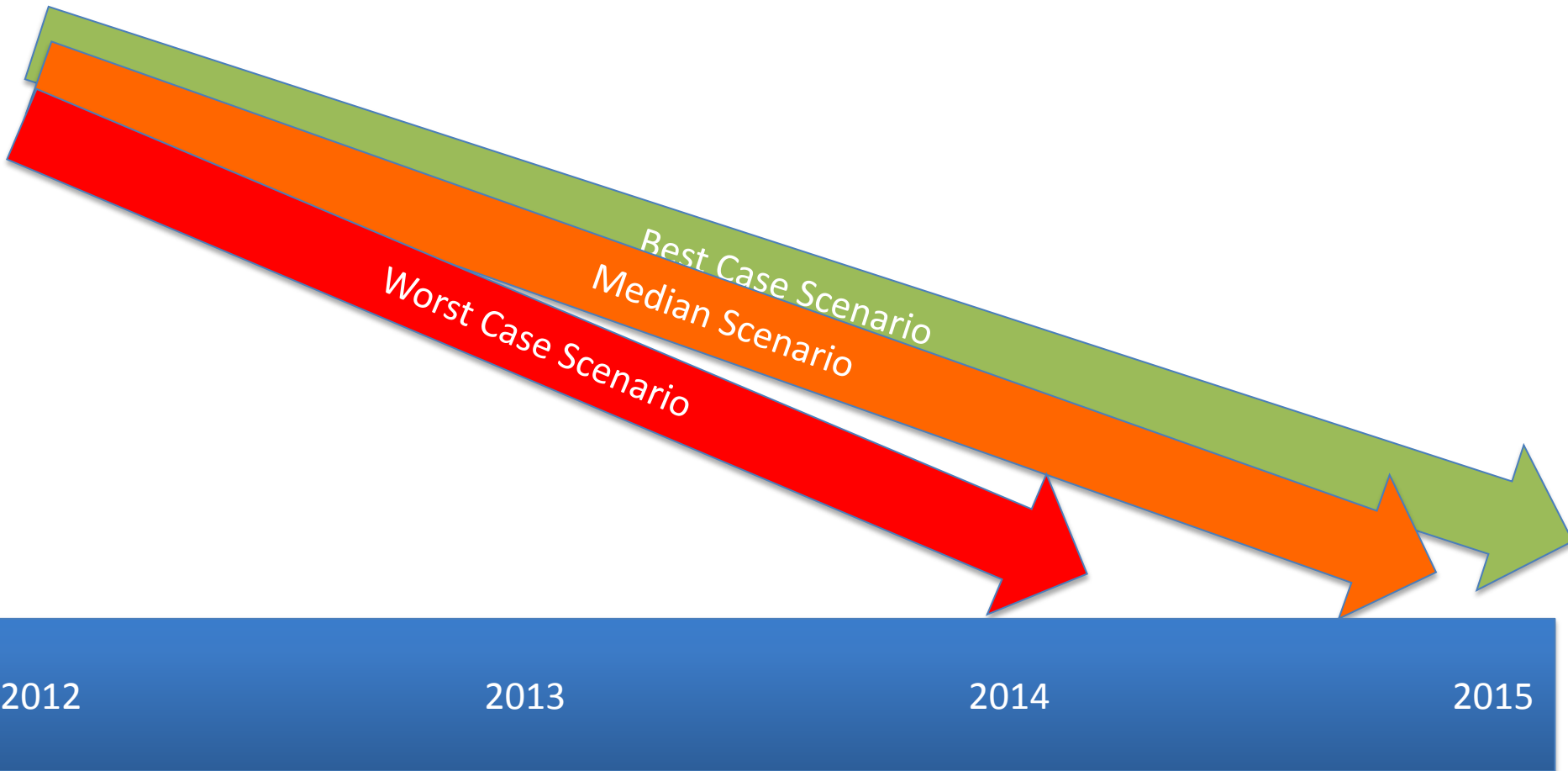
3G Handset Data Traffic



via: mobiThinking

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Mobile Operators Operating Profit Time to Breakeven



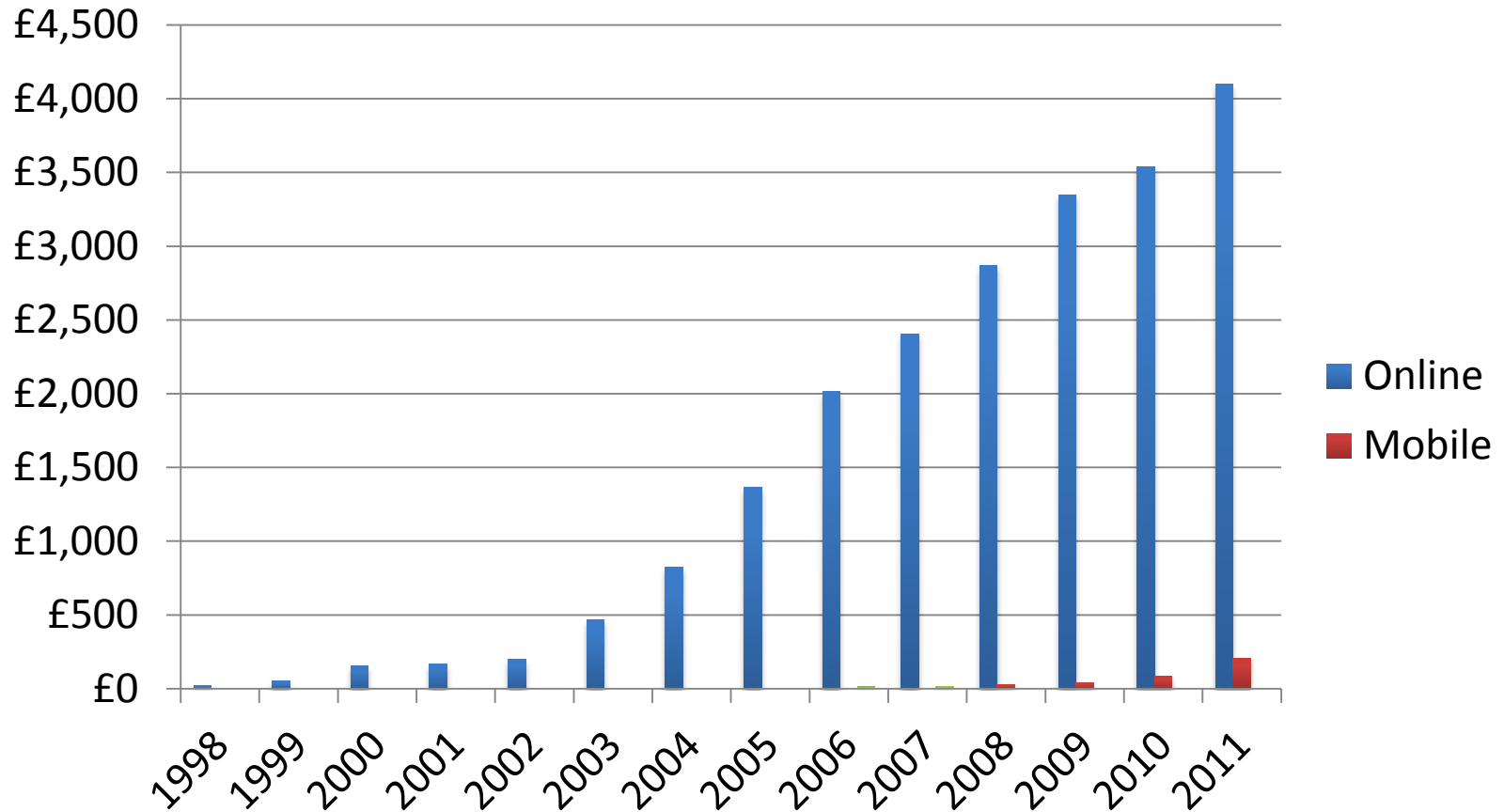
Tellabs/ Analysys Mason

3/26/2012

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But isn't it so small?

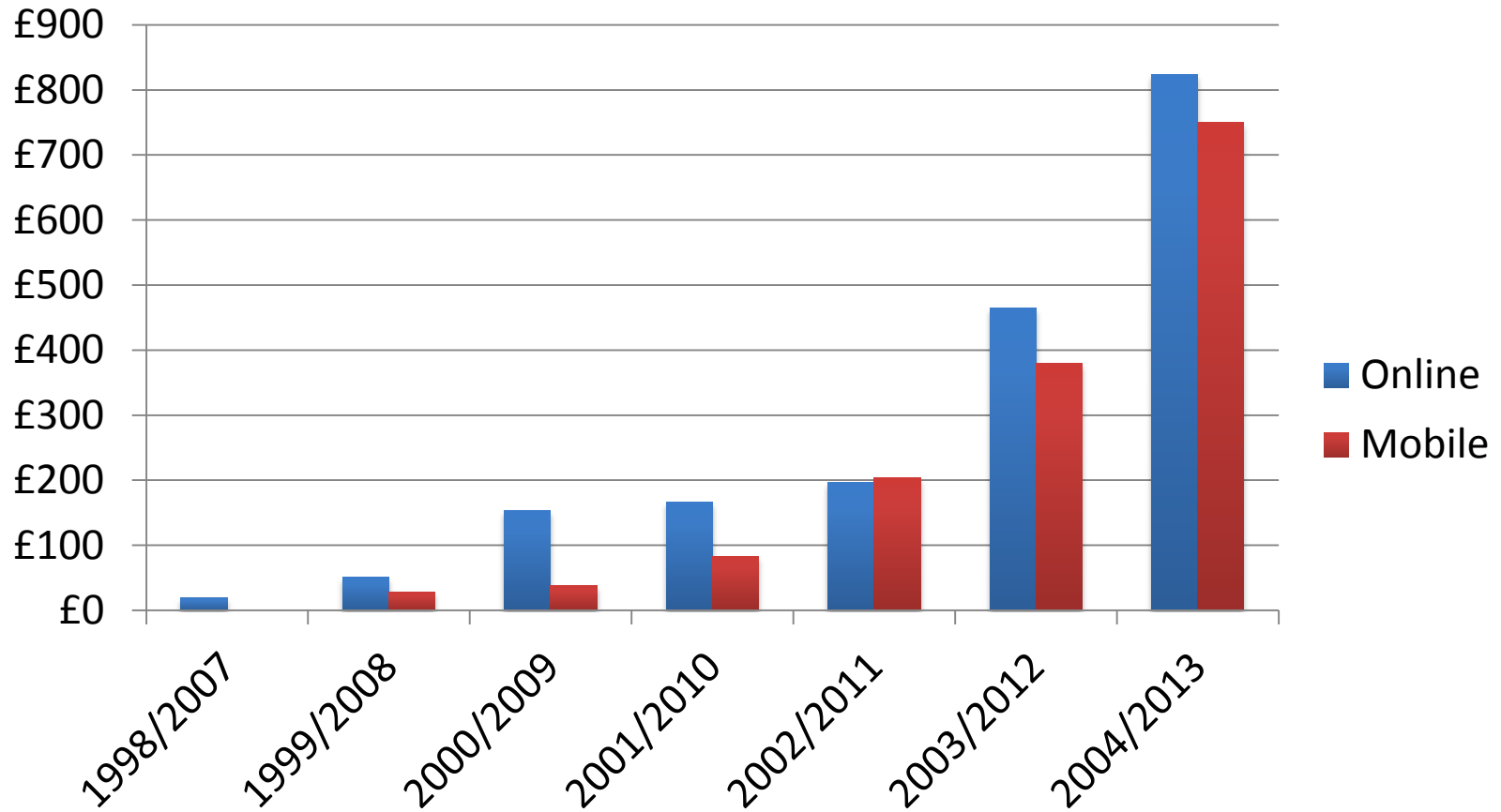
UK Spend £m



PWC, IAB UK

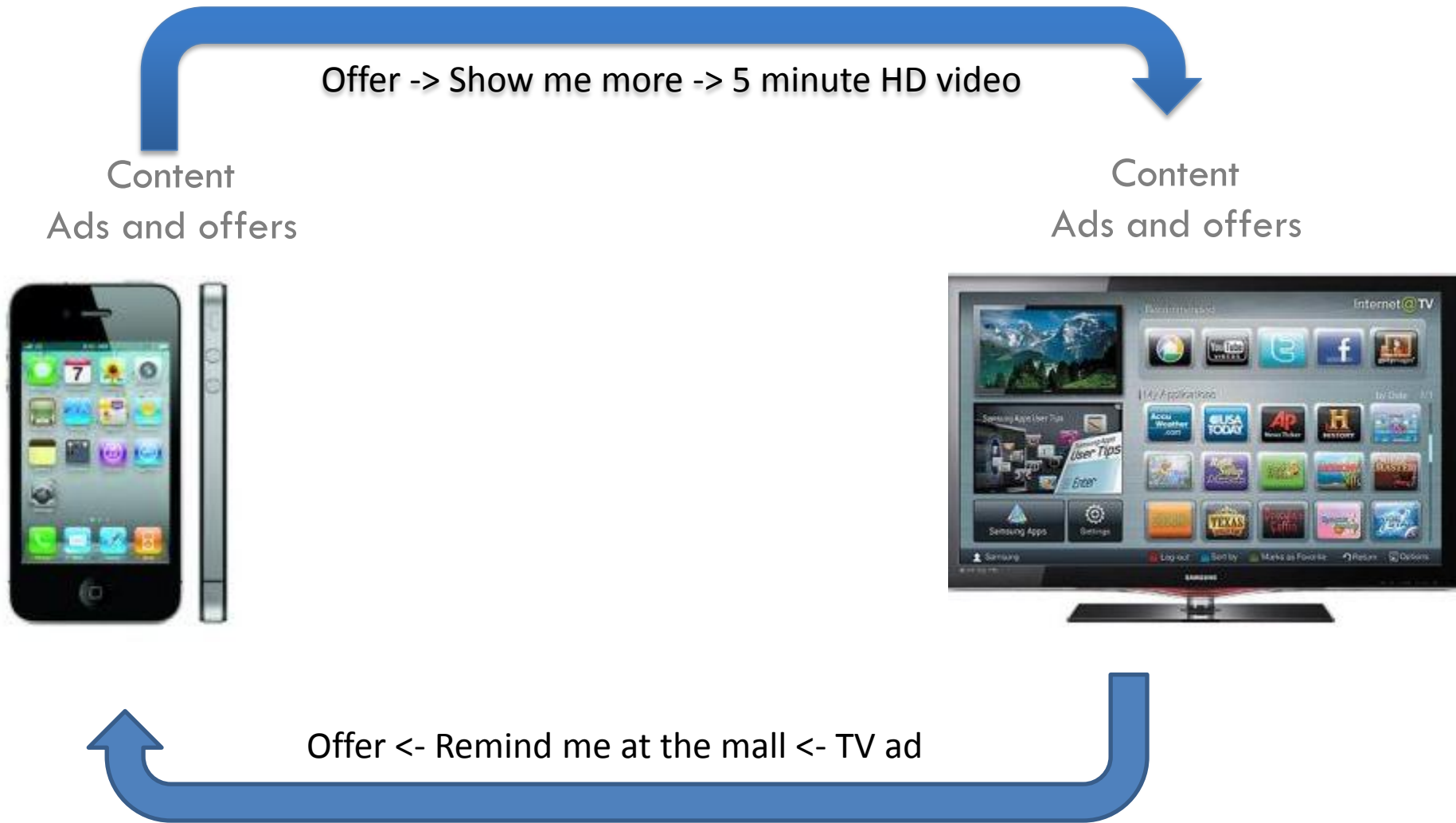
Digital all over again – 9.25 years later?

UK Spend £m

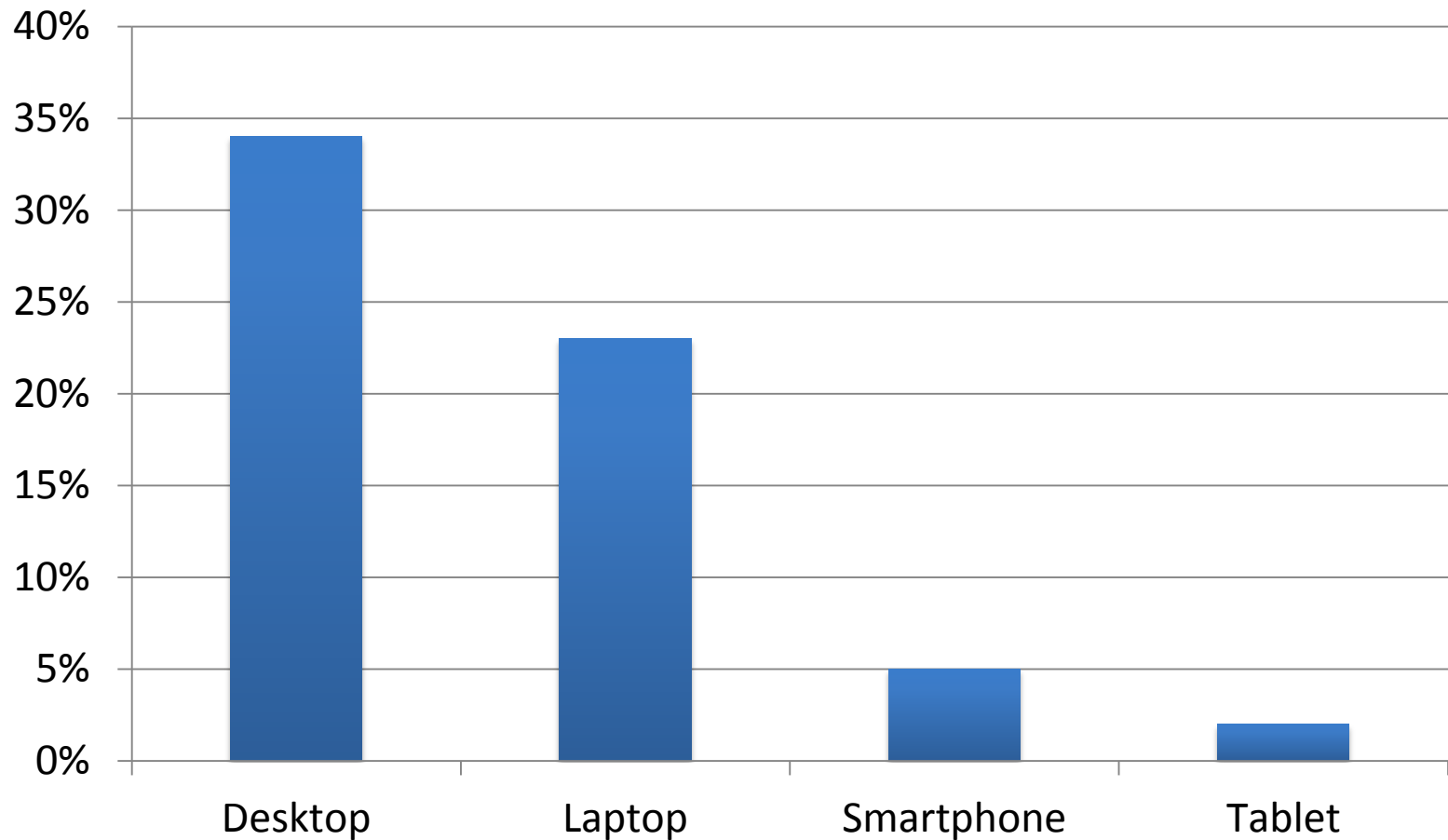


PWC, IAB UK

Interaction of TV & Mobile



Where consumers prefer to receive ads and promotions



Upstream, Yougov

The Consumer's Problem

Behavioral
Tracking
& Analysis

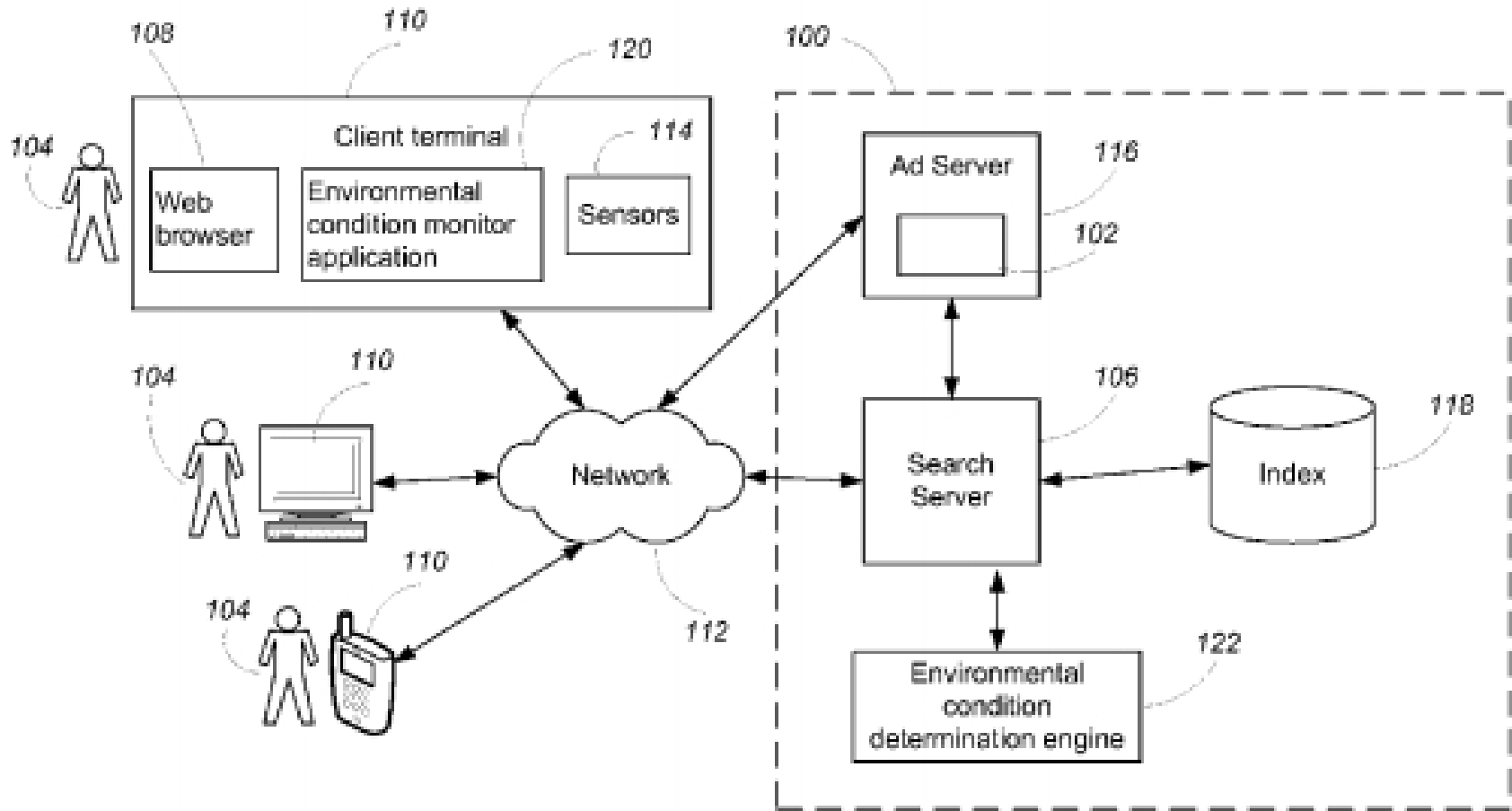


'Tell me about the good stuff' - I don't want to miss out

'Don't bombard me with irrelevant messages' - My inbox is overfull already

'Give me control' - To tell you what I want

The Patent battle for Data



An industry based on inferring needs from Data Exhaust Sniffing



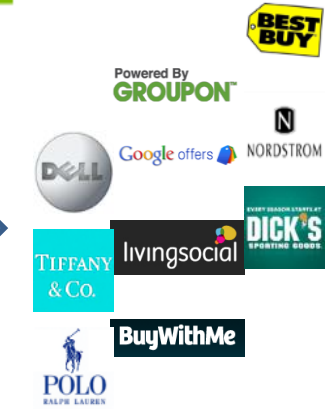
Consumer Use of Personas



Creates Persona on phone



Receive filtered offers



Interact with relevant advertising



Get suitable content



M-Commerce

Less e-commerce than...

