

Social Media

The next phase of Social Media
including the 4Fs.

“The re-imagining of everything”



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Mary Meeker KPCB Dec 2012



**“THIS CYCLE OF
TECH
DISRUPTION IS
MATERIALLY
FASTER &
BROADER THAN
PRIOR CYCLES “**



Who am I?

- Managing Partner T2Impact
- Founder VaultPAD Accelerator
- Tnooz Node
- Permanent Advisor to WEF
- Expedia Founding Team member
- AKA “Professor Sabena”



Fail But Not Abort

Act 2 Scene 3 (with apologies to the Bard)

Friends, Emerati, countrymen, lend me your ears;

I come to bury Facebook, not to praise it.

The evil that Social Media does lives after it;

The good is oft interred with its bones;

So let it be with Facebook.



Pop Quiz

Q1 What is today's most consumed product?

Q2 50 years ago what was the world's most consumed product?



Do you know what this is?



- Some of you still use them
- Some of you might remember this advertising campaign
- Yes this product was consumer 20x/day
- And your mobile is used how many times a day??

Edition: UK ▾

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9 Best Laptops You Can Buy In Spring 2013

Memory Loss: One In Four Adults 'Don't Know Own Phone Number'

Huffington Post UK | Posted: 27/07/2012 12:04 Updated: 27/07/2012 12:20

73

62

9

41



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One in four adults doesn't know their own phone number, according to new research.

A poll of 2,000 people by mobile security firm BullGuard said that the average Brit can only memorise two phone numbers.

And of the numbers people do remember, most of the numbers are from the pre-mobile era.

This is rather sad

BUT TRUE

Social Media is FAILING

```
Ticket?: (No ticket provided -  
possibly an error in the error-  
system)
```

```
Error: An error occurred in this  
error. The error has been reordered  
and the recursion process invoked.
```

```
Abort, Retry, Fail?_
```

```
C:\
```

The 4 Failings of Social Media

- Facebook
- Fragmentation
- Fads and Fetishes
- Flexibility



Is Something Wrong?

News > Technology > Facebook

Facebook loses millions of users as biggest markets peak

Facebook's dominance in the social media world has come under threat from newer services such as Instagram and Path

Facebook's user exodus: our readers tell us what's wrong

Juliette Garside

The Guardian, Sunday 28 April 2013



- The medium is no longer the message (sorry MacLuan)
- Our brave new world has moved on and Facebook's 15 minutes of fame is probably at about 13 mins and 15 seconds

What are they doing?

- Mobile
- Real Social
- Fiddling about (aka Games)



What is happening to Facebook?

Where are the users going



Fragmentation

- The market place is continuing to fragment
- Less and less homogeneity in any form of Social Media
- Social Media is failing to keep the populace engaged (yes they are bored!)
- Mobile experience has to be a synthesis and ads just don't hack it.
- Ad spend on mobile is still largely experimental



Fads and Fetishes

- The time taken for the lifecycle of fad is declining every year
- Who remembers...
 - Betamax
 - Newton
 - Second Life
 - Groupon
 - Angry Birds



Flexibility etc

- We demand flexibility
- We demand choice
- We demand transparency
- We need trustworthy



In travel we are seeing ADHD consumers

- Someone quoted more than a quarter of all travel purchased will be Mobile next year... believe it?
- Travel is very complicated
- Single Applications that take care of your entire trip are not there.



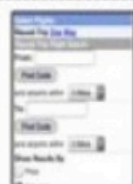
Airline Mobile Travel Timeline

Available Now or within 12 months

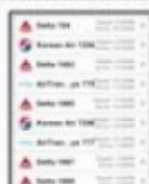
Widespread 1- 2 Years

Widespread 3- 5 Years

Mobile Functionality



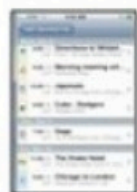
Booking



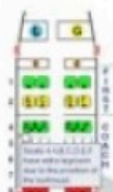
Schedules



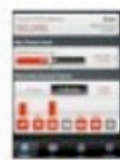
Flt Status



Itinerary Mgmt



Seat maps



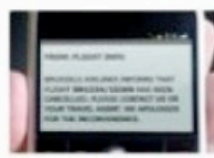
Check Loyalty Balance



Mobile boarding pass and BCBP



Airport Information



SMS Disruption Mgmt

Ancillary Services and Merchandising



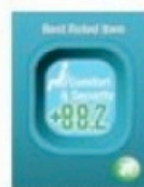
Deals & Offers



Book Loyalty



Enroll in Loyalty



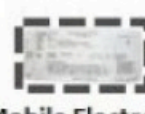
Immediate Social Media Response



Mobile Roaming Agent



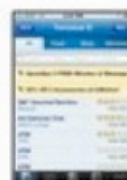
Passenger Tracking



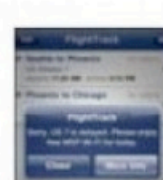
Mobile Electronic Airline Voucher



Airport Coupon Offers



Location Based Offers



Ancillary Services



Immersive Tablet Apps



Interactive Voice Commands



Augmented Reality



Interactive Videos



NFC mobile boarding



Mobile payments



Ground Operations



Personalized Ancillary and Merchandising Offers

Notable Statistics for Mobile

- Average App usage is 71 seconds
- Most downloaded apps are never used
- Etc etc
- The problem of recency
- The problem of too many inconsistent Apps
- The problem of poor developers



What does work in Social?

- Here are a few.
- 1. Trust in my friends. Word of Mouth beats everything else
- 2. Applications that help me navigate the firehose of data that comes my way
- 3. Consistency of service across (all) multiple channels



The Re-Imagining of Everything

- Casting off the Baby Boomers
- Millenials Lifestyle: Asset Heavy to Asset Light
- Dumping traditional 1st Generation Tech
 - PCs → Tablets
- BYOD and Multi-Screen
- Landlines → Mobile
 - Of my 100 top contacts (email) 22 of them have no landline.



Things we are leaving behind

- Text books
- Dedicated Cameras
- GPS units
- CDs/DVDs – full Albums
- Full Time work
- Fixed Healthcare
- Paper Tickets



What's next?

- Cash (paypal, Square)
- Car Ownership (ZipCar)
- Accommodation (Airbnb etc etc)
- Big OTAs (Kayak, Skyscanner move into purchase path)



So what does the future of Social Look Like?

- Chat (communicate)



- Share
- Stalk (occasionally)



Here are some examples

- Pintrips – a true social sharing application for flight planning and management
- Air Black Box – solving the problem of LCC connecting to Legacy Carriers
- Rome2Rio – door to door trip planning
- Dexter Intelligence – Finding what you were looking for

pintrips



My Predictions for Social

- Subtle but clear migration from explicit to implicit
- Natural interfaces (UX)
- Multi-speed, Multi-screen world
- Sharing IS Caring
- Curated Trustworthy vs Just Crowd Worthy
- Big Data driven
- Contextual AND Individual



For more information

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