

The Mobile Revolution

Ewan MacLeod

@ew4n

Topics

- About me – context
- Mobile: Size & scale
- M-commerce
- Implications for meetings



Famed Nokia Exec, Anssi Vanjoki, is now in control of Vertu. Bring it ON!

by Ewan on October 13, 2012 in Devices, Opinion [Edit]

Yes, you read that right. Anssi Vanjoki, one of the most influential people in Nokia's rise to the top is back. He left the company shortly after Stephen Elop arrived and we haven't heard too much from him since. But I've had my eyes peeled looking to see what, if anything, he would be doing [...]

[Read full story](#) • [4 Comments and 7 Reactions](#)



The Walking Dead fans: Get US iTunes credit and buy Season 3 now!

by Ewan on October 13, 2012 in Services [Edit]

I have thoroughly enjoyed the past two seasons of The Walking Dead zombie apocalypse, both via iTunes. I think I bought the first season from iTunes UK and then bought the second one via the US iTunes store. I just couldn't wait... and actually, I think it might have been slightly cheaper as the exchange [...]

[Read full story](#) • [2 Comments and 5 Reactions](#)



Groupon's iPad point-of-sale system for restaurants

by Ewan on October 10, 2012 in Services [Edit]

POPULAR LATEST COMMENTS TAGS

Panic Stations at Cupertino: Why Apple's iOS 6.0 Maps is a multi-billion dollar problem happening right now
SEPTEMBER 21, 2012

Is it now desperately uncool to be seen with an iPhone?
SEPTEMBER 12, 2012

Apple's souring koolade... And why it's good news for the market
OCTOBER 4, 2012

TechCrunch comes out in support of RIM! Well, sort of...
SEPTEMBER 27, 2012

Have you come across a desktop app that will masquerade as an Exchange ActiveSync client?
OCTOBER 10, 2012

Search...

twitter

I am going to check this one out --
> Canonical's Ubuntu One Cloud Storage Service Comes To The Mac <http://t.co/o1knS6wI> 1 day ago

About Me

- Founder of Mobile Industry Review
 - www.mobileindustryreview.com
- 250,000 readers
- Consultant & Advisor
- Specialise in 'innovation', helping:
 - Mobile operators, phone manufacturers, pension funds, banks, VCs

Mobile: This is big...

First let's get some context

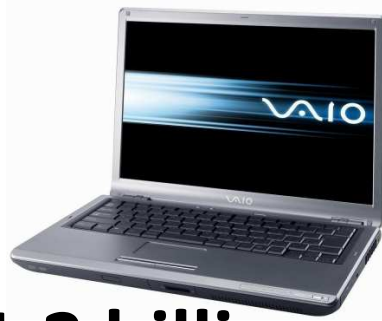
At the end of 2011...



1.7 billion
televisions



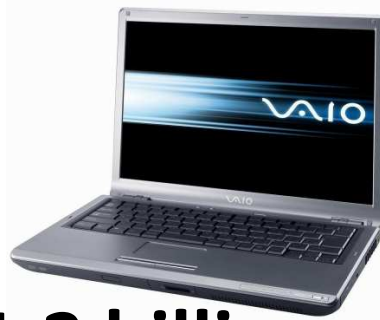
1.7 billion
televisions



1.2 billion
personal computers



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



1.7 billion
televisions



1.2 billion
personal computers



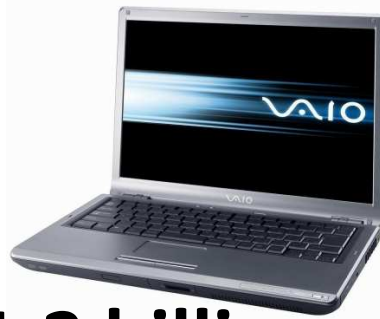
1.1 billion
fixed landline telephones



2.2 billion
Internet users



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



970 million
registered car owners



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



970 million
registered car owners



1.8 billion
credit cards (with at
least 1 card)



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



970 million
registered car owners



1.8 billion
credit cards (with at least 1 card)



450 million (daily)
newspaper circulation



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



970 million
registered car owners



1.8 billion
credit cards (with at least 1 card)



450 million (daily)
newspaper circulation



800 million
IM users



1.7 billion
televisions



1.2 billion
personal computers



1.1 billion
fixed landline telephones



2.2 billion
Internet users



900 million
pay-tv subscriptions



2 billion
email users



970 million
registered car owners



1.8 billion
credit cards (with at least 1 card)



450 million (daily)
newspaper circulation



800 million
IM users



1.8 billion
households
(with mortgage/rent/utility service)

4.2 billion

toothbrushes on the planet



Source: MMA Forum Asia via Tomi Ahonen

5.9 billion

mobile phone subscriptions



5.9 billion

mobile phone subscriptions



6.4 billion by Jan 2013

mobile phone subscriptions



4 BILLION

Unique mobile subscribers

4.8 billion phones currently in use

57% of the planet's population has a mobile phone

WATER, ELECTRICITY

As a percentage of the human population, more people have access to a mobile phone than electricity or running water

\$1.3 TRILLION

Total industry revenues in 2011 (services & hardware)

Mobile Industry Revenues 2011 & 2010

	2011	2010	Growth
Mobile Services	\$1,011 B	\$ 928 B	9%
Voice	\$ 651 B	\$ 628 B	4%
Data	\$ 365 B	\$ 301 B	21%
Messaging	\$ 186 B	\$ 172 B	8%
SMS	\$ 126 B	\$ 120 B	5%
MMS	\$ 39 B	\$ 34 B	15%
VAS Data	\$ 179 B	\$ 129 B	39%
Mobile Advertising	\$ 14 B	\$ 9 B	56%
Smartphone apps	\$ 12 B	\$ 8 B	50%
Business apps	\$ 7 B	\$ 6 B	17%
Consumer apps	\$ 5 B	\$ 3 B	67%
Handset Sales	\$ 205 B	\$ 165 B	14%
Networks and Accessories	\$ 85 B	\$ 90 B	6%
TOTAL	\$1,301 B	\$1,183 B	10%

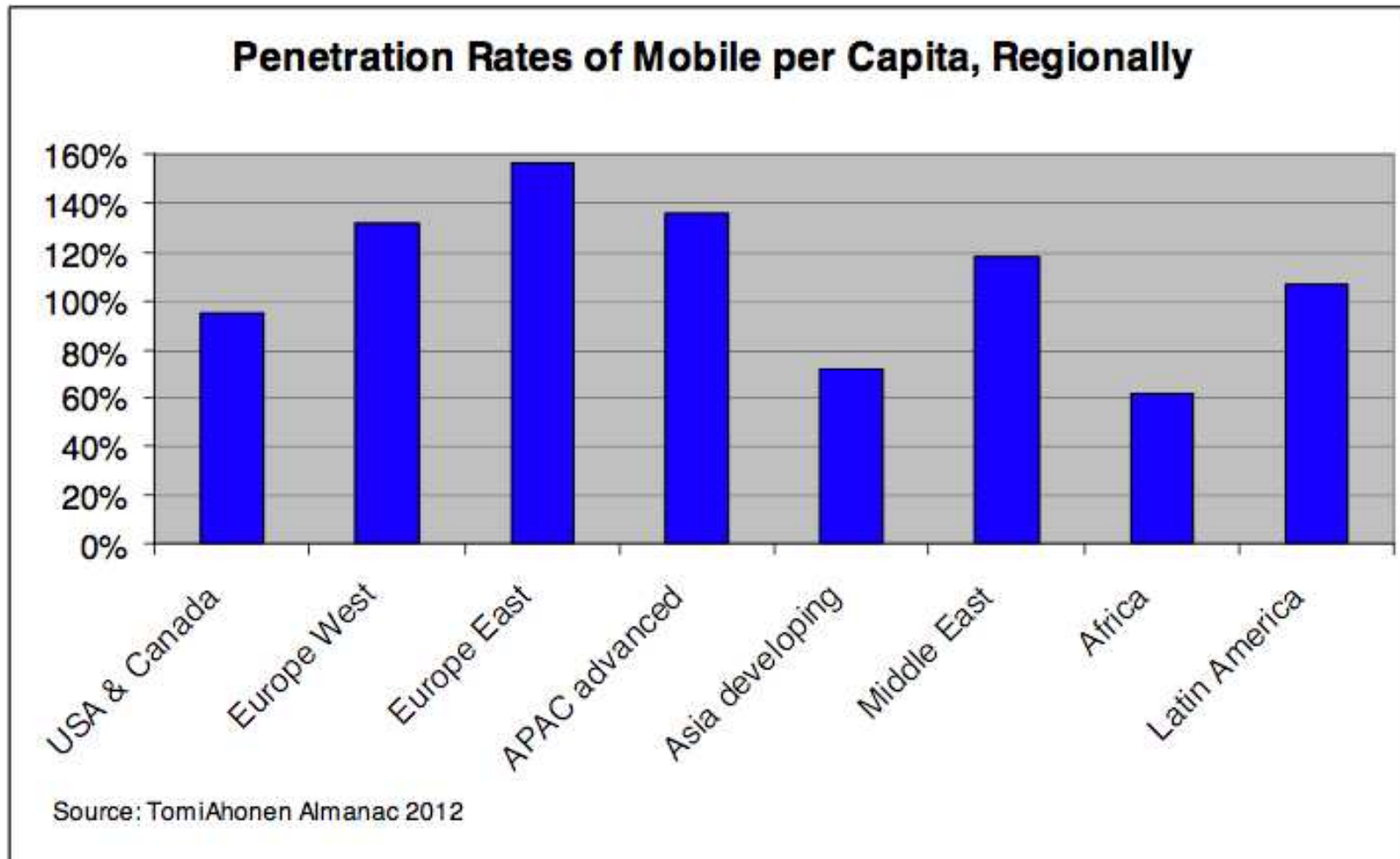
Source: TomiAhonen Almanac 2012

Mobile Industry Revenues 2011 & 2010

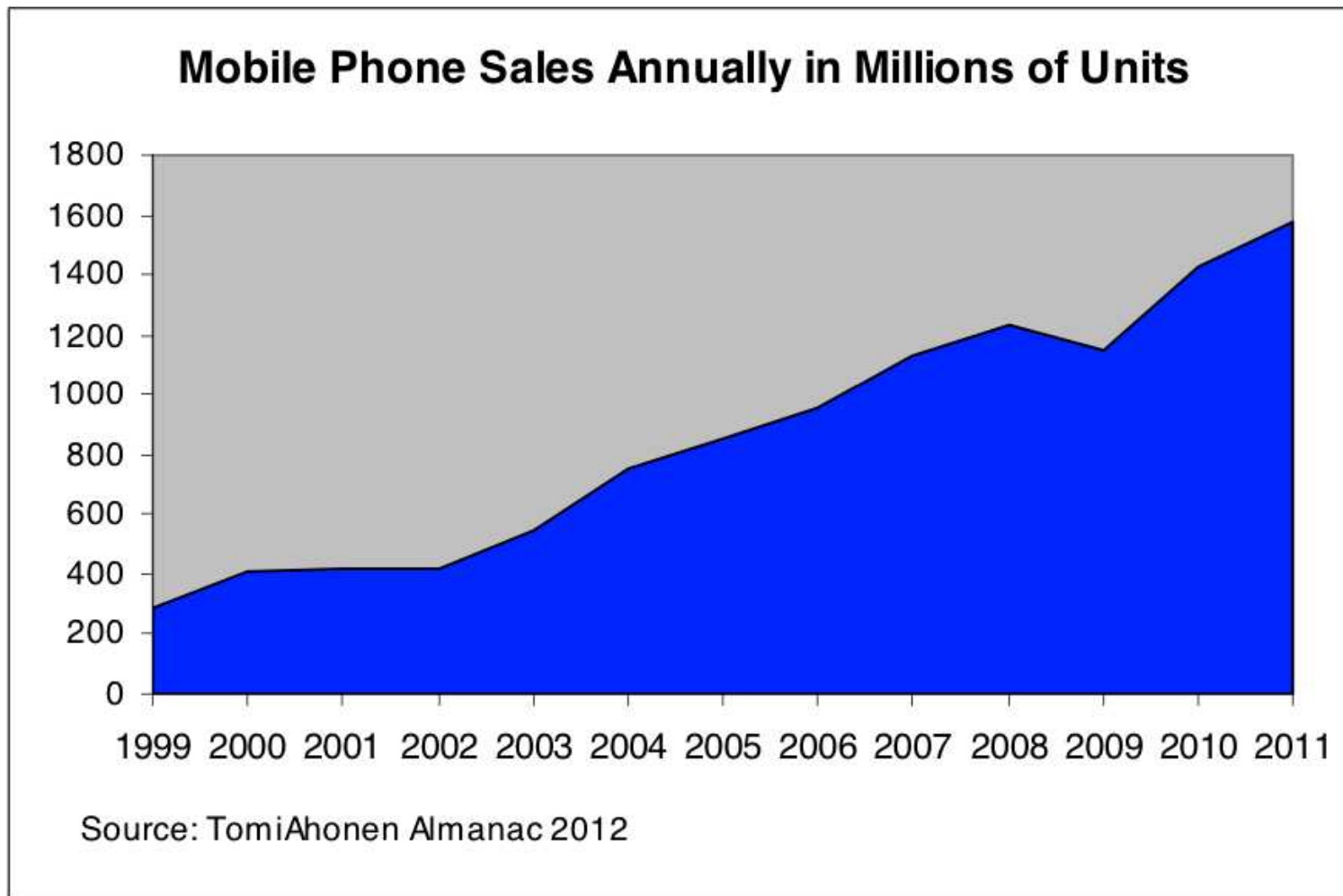
	2011	2010	Growth
Mobile Services	\$1,011 B	\$ 928 B	9%
Voice	\$ 651 B	\$ 628 B	4%
Data	\$ 365 B	\$ 301 B	21%
Messaging	\$ 186 B	\$ 172 B	8%
SMS	\$ 126 B	\$ 120 B	5%
MMS	\$ 39 B	\$ 34 B	15%
VAS Data	\$ 179 B	\$ 129 B	39%
Mobile Advertising	\$ 14 B	\$ 9 B	56%
Smartphone apps	\$ 12 B	\$ 8 B	50%
Business apps	\$ 7 B	\$ 6 B	17%
Consumer apps	\$ 5 B	\$ 3 B	67%
Handset Sales	\$ 205 B	\$ 165 B	14%
Networks and Accessories	\$ 85 B	\$ 90 B	6%
TOTAL	\$1,301 B	\$1,183 B	10%

Source: TomiAhonen Almanac 2012

87 countries have 100%+ penetration



1.5 billion handsets sold last year



350m new TVs, 250m new DVD players, 400m new PCs

1.75 BILLION

New handsets sold this year – the prediction!

MOBILE MOMENT

By December 2012, there will be more mobile subscriptions than people on the planet

(7.1 billion mobile subscriptions vs 7 billion people)

A glance at the revolution
unfolding...

Mainframe computers

1 million units in 10 years



Minicomputers

10 million units in 10 years



The PC

100 million units in 10 years



Desktop Internet

1 billion users in 10 years



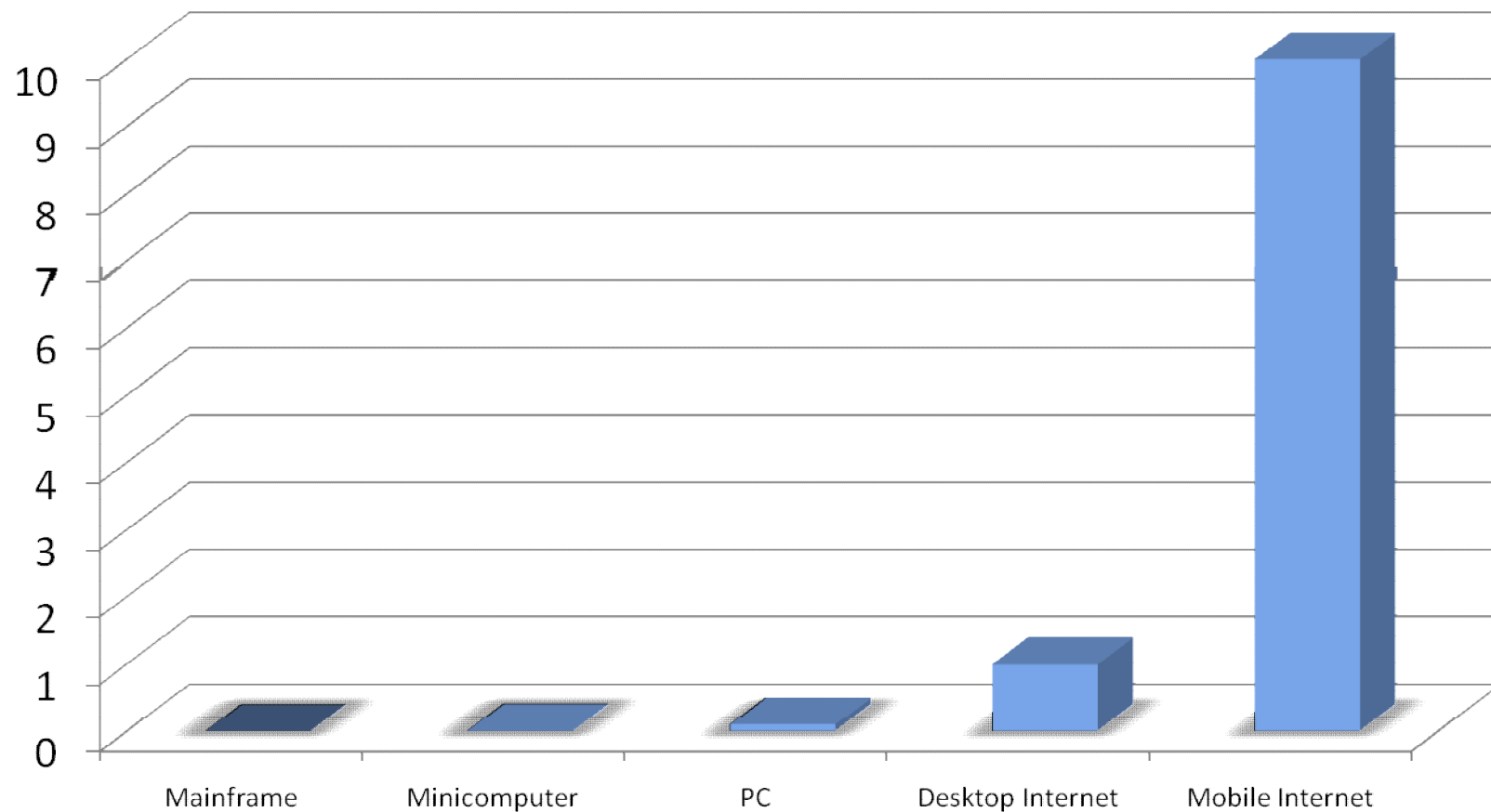
Mobile Internet

10+ billion units sold in 10 years

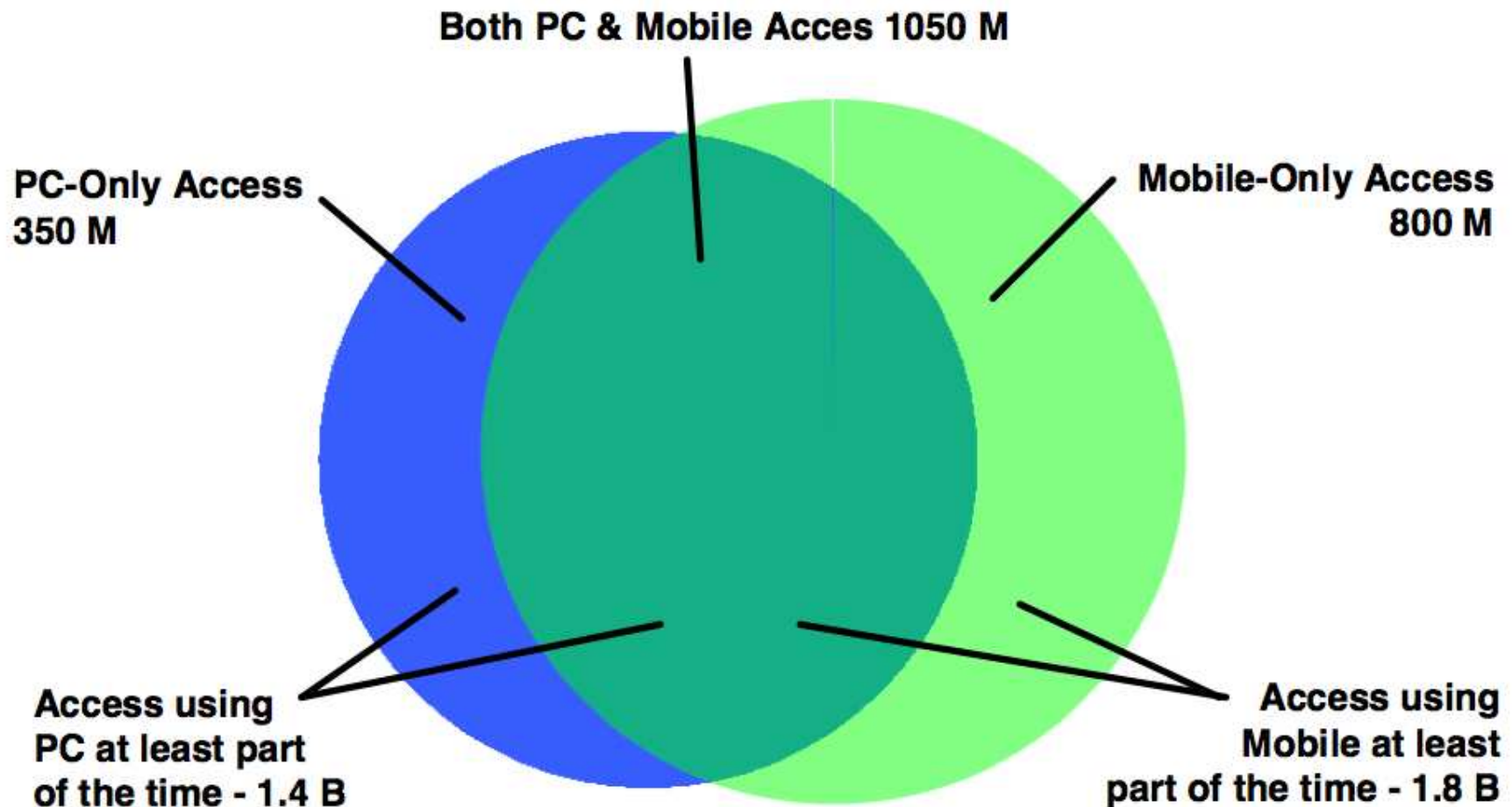


It's not a bubble, it's a revolution

Units sold/users in first 10 years



Browsing By Method of Access 2011



Source: TomiAhonen Almanac 2012

Every day, more Android phones are
activated than babies are born



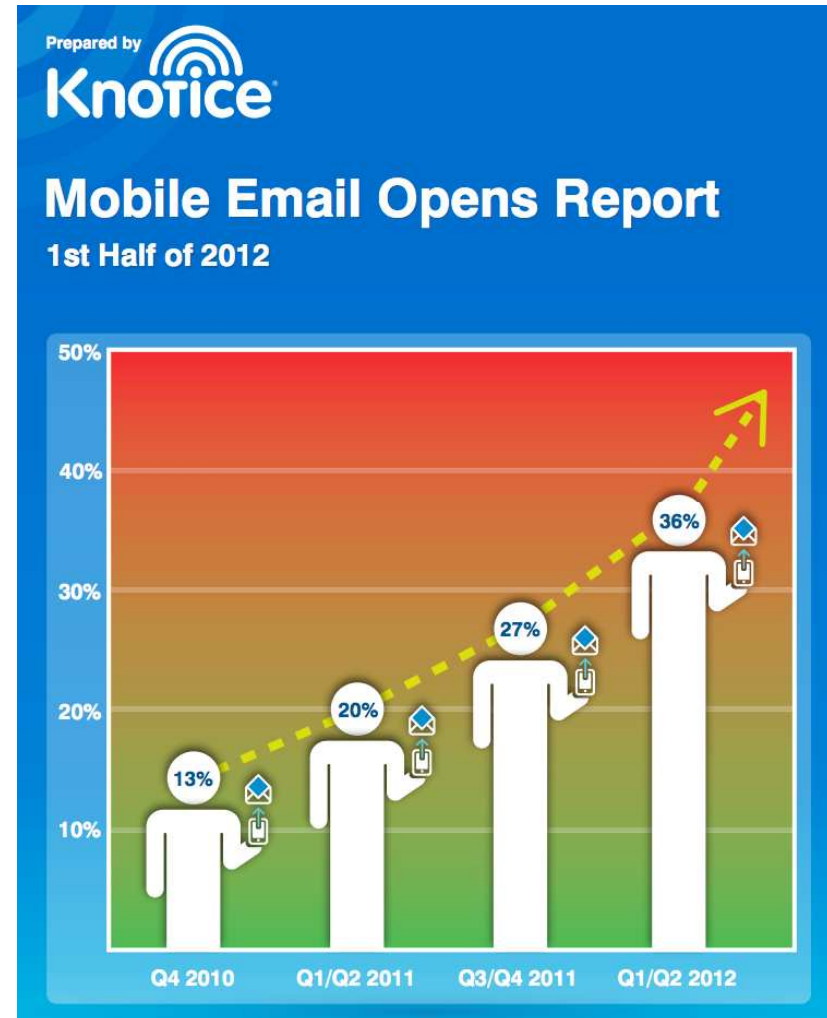
~~900,000~~ 1,300,000 Android activations daily; 300,000 births planet-wide each day

**By 2020, half of all payments will
be transacted via mobile**

- VISA

~~27%~~

36% of emails
are opened on
mobile devices



[Source: Knotice Report, 1H 2012](#)

The average person checks their
mobile **150** times per day

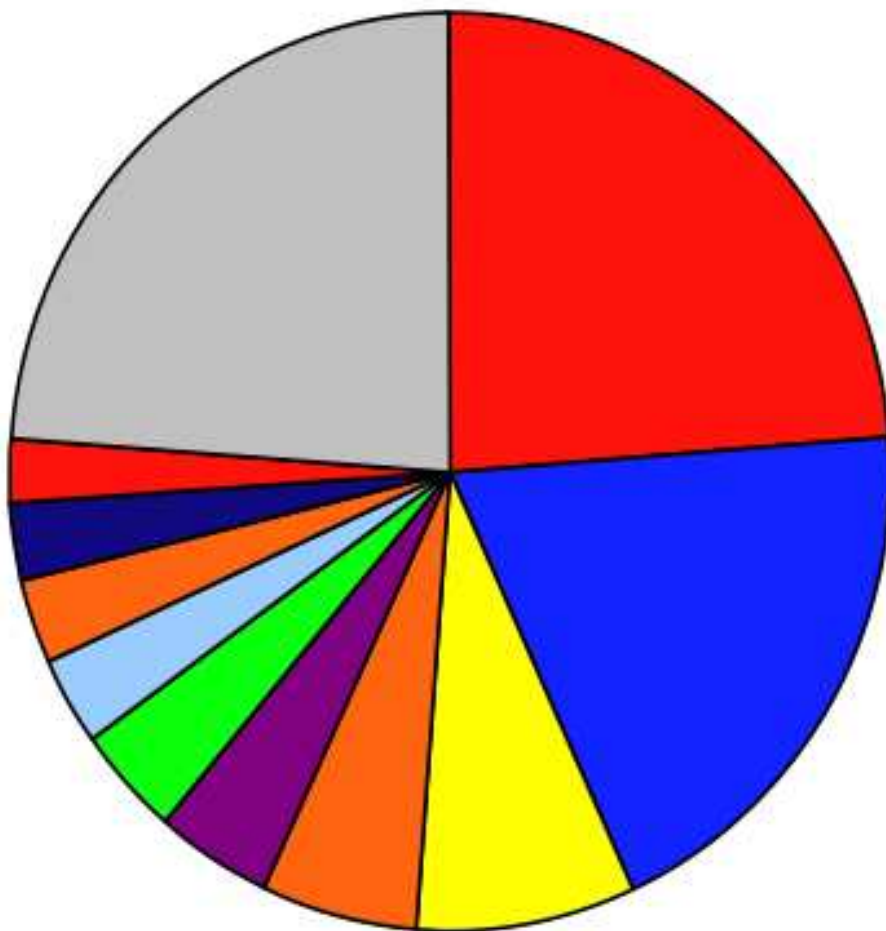
Or every 6.5 minutes

The average person checks their
mobile **150** times per day

Or every 6.5 minutes

(82 times per day in Africa)

New Mobile Phone Sales Market Shares Full Year 2012 (est)

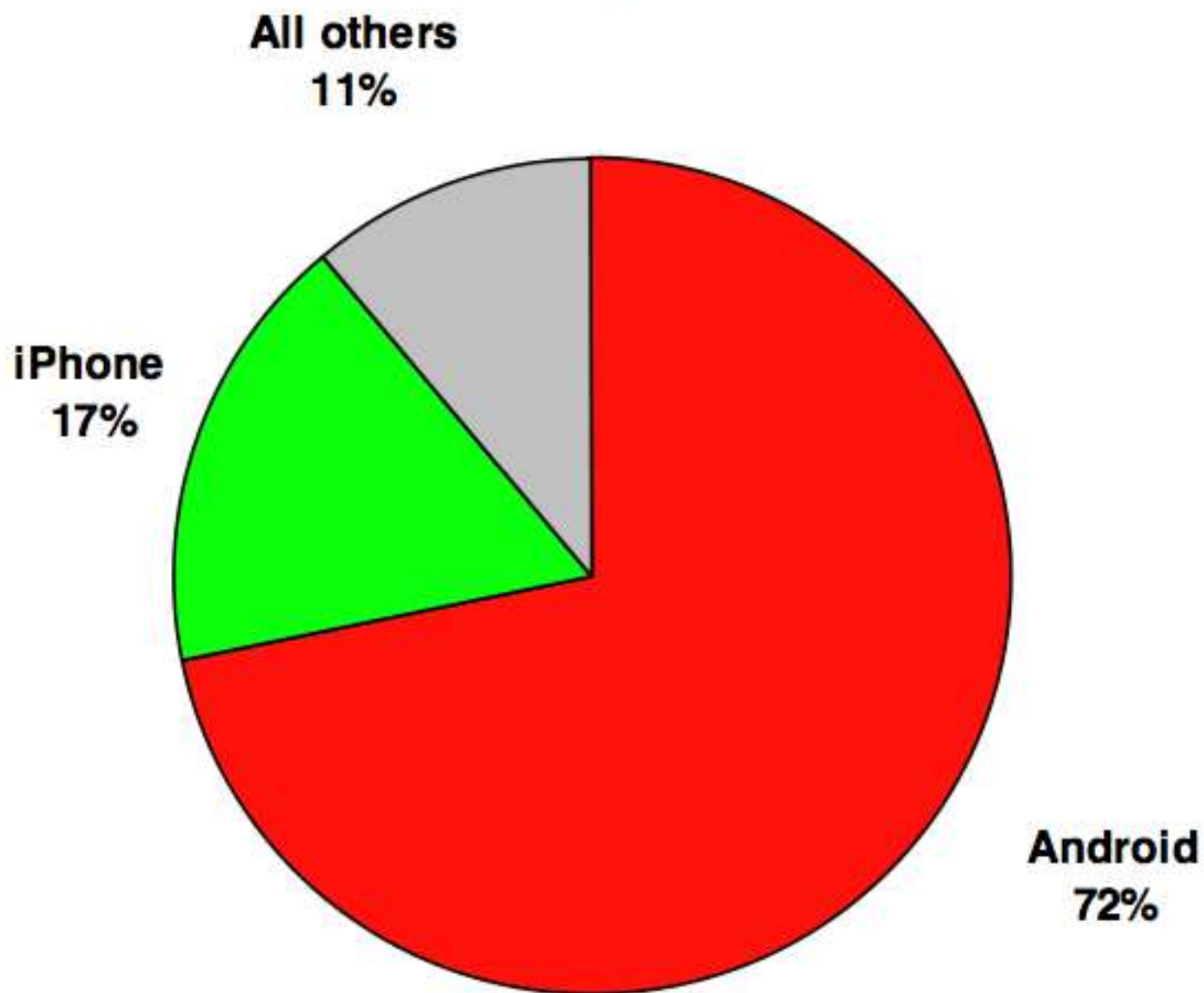


- Samsung 24%**
- Nokia 19%**
- Apple 8%**
- Huawei 6%**
- ZTE 4%**
- LG 4%**
- HTC 3%**
- Sony 3%**
- TCL 3%**
- Motorola 2%**
- Others 24%**

Who's missing from the list? RIM!

Just looking at smartphones...

Consumer Smartphone Market Shares



This stuff changes quickly...

It's not just smartphones...



Tablets...

Top 5 Vendors, Worldwide Tablet Shipments, Third Quarter 2012 (Preliminary) (Units Shipments are in millions)

Vendor	3Q12 Shipments	3Q12 Market Share	3Q11 Shipments	3Q11 Market Share	3Q12/3Q11 Growth
1. Apple	14.0	50.4%	11.1	59.7%	26.1%
2. Samsung	5.1	18.4%	1.2	6.5%	325.0%
3. Amazon.com	2.5	9.0%	NA	NA	NA
4. Asus	2.4	8.6%	0.7	3.8%	242.9%
5. Lenovo	0.4	1.4%	0.2	1.1%	100.0%
Others	3.3	12.2%	5.4	28.9%	-38.9%
All Vendors	27.8	100%	18.6	100%	49.5%

Source: IDC Worldwide Quarterly Tablet Tracker, November 5, 2012 (preliminary data)

Table Notes:

- Some IDC estimates prior to financial earnings reports.
- Amazon didn't begin shipments of its tablet products until 4Q11
- Shipments include shipments to distribution channels or end users. OEM sales are counted under the vendor/brand under which they are sold.

eBay: A sale **every second** via mobile

\$610m in 2009

\$2 billion in 2010

\$6 billion in 2011

\$8 billion expected in 2012



Average of 4 sold per month via mobile on eBay

Source: IAB 14th June 2011

10% of UK teenagers think it's fine
to send an SMS while having sex

49% say it's fine to text while eating

91% of mobile users keep their
phone **within 1m** (3ft) range 24/7,
even whilst sleeping

63% of the population **do not share**
their phone, ever, not even with
spouses/partners

What's the consumer doing with mobile travel?

A quick glance





In-Room Dining



Hotel Restaurants



Pre-Arrival Requests



Comment Card



Concierge Requests



Housekeeping



Turn Down



Engineering



Weather



Date & Time



Wake-Up Call



Direct Messaging



News



Golf Services



Spa Services



Rewards Program



Hotel Info



Local Attractions



Maps & Directions



Hotel Gift Shop



Airline Info



Airline Checkin



Airline Boarding Pass



Taxi Service



Limo Service



Hotel Daily Events



Valet Services



Video



Music



Advertising



Internet



Social Media



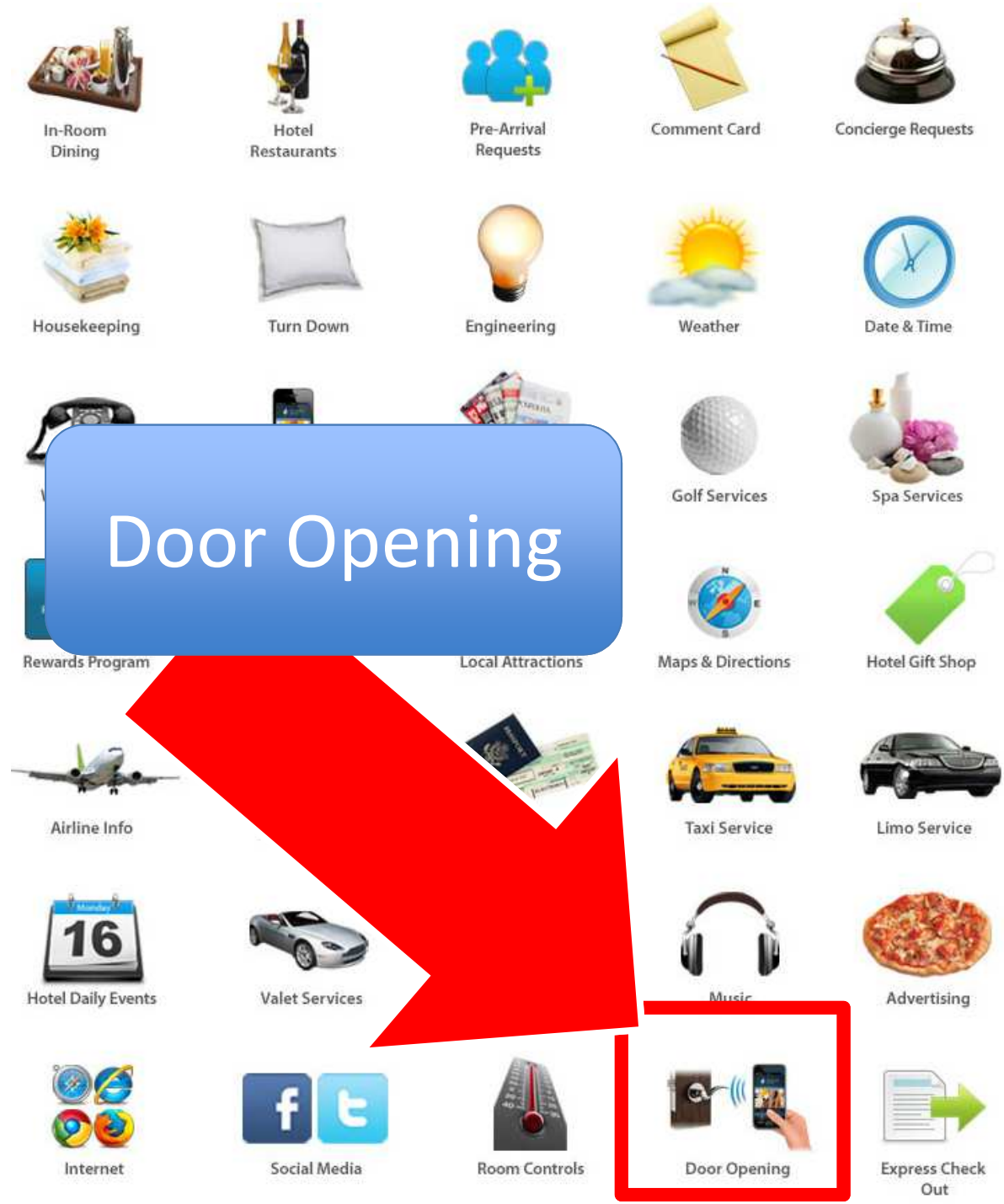
Room Controls

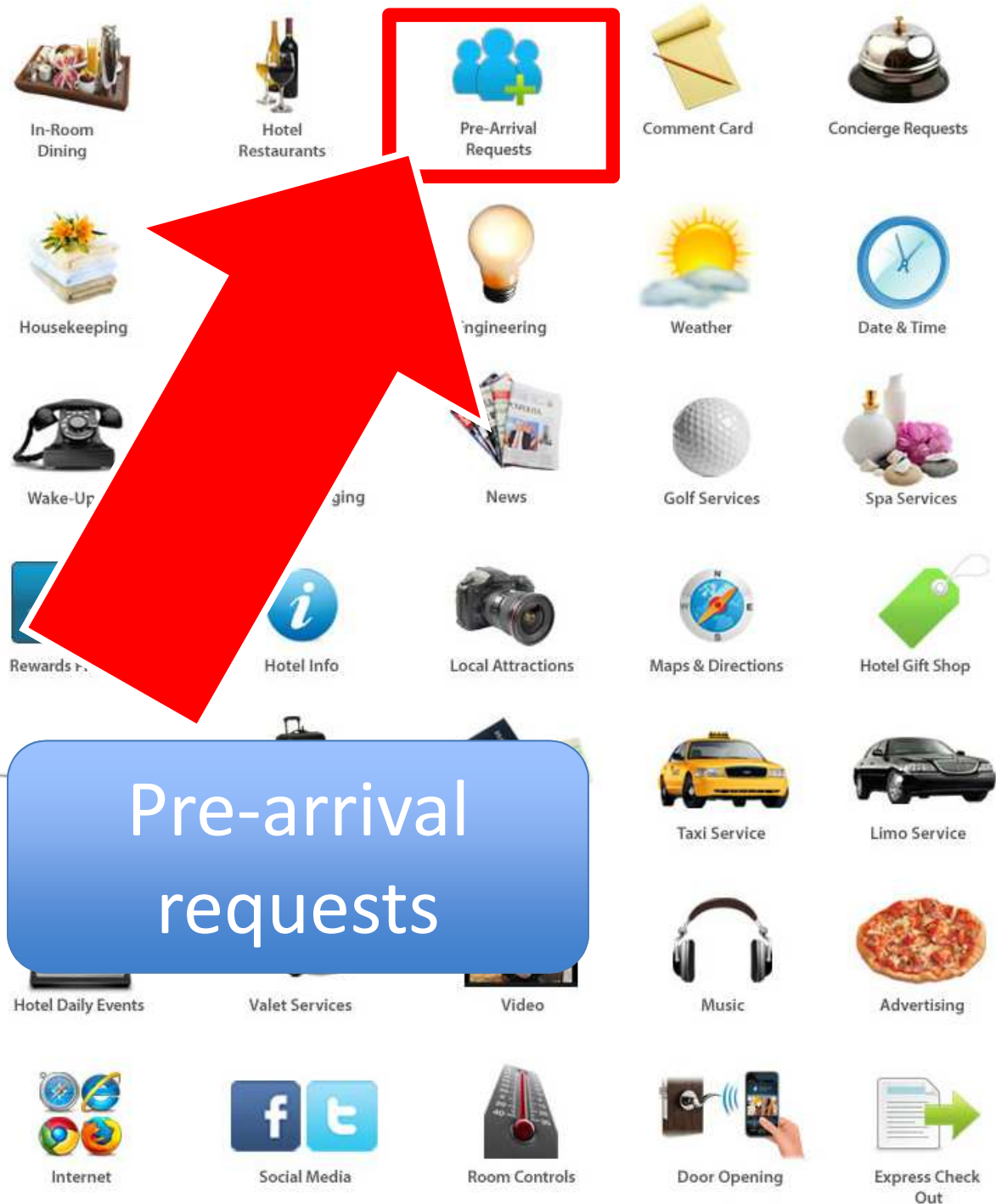


Door Opening



Express Check Out





Pre-arrival
requests

Make Your Hilton Hotels Requests Upon Arrival
Thank you for choosing Hilton Americas-Houston for your upcoming stay. Listed below is an assortment of amenities you can select from in advance of your check-in to make your stay more comfortable. Just click on your selection and indicate the quantity, and we will have the amenities waiting for you when you arrive. It's just another way we recognize your individual needs whenever you stay with us. We look forward to welcoming you to the Hilton Americas-Houston.



EWAN MACLEOD
HHonors#: 727141973

Confirmation #: 3445581039



Check-in: Monday, 10-Oct-2011
Check-out: Wednesday, 12-Oct-2011

→ Estimated Arrival Time:

Hilton Americas- Houston



1600 Lamar
Houston, TX, USA, 77010
Tel: 1-713-739-8000



Fax: 1-713-739-8007



Order your amenities by selecting a quantity next to each item, then click "Submit Order"

Requests Upon Arrival Items

Beer

	Quantity
Bud Light (12oz. bottle)	<input type="text" value="0"/>
Price Per Item: 6.00 USD	
Shiner Bock (12oz bottle)	<input type="text" value="0"/>
Price Per Item: 7.00 USD	

Wine

	Quantity
Corona (12oz bottle)	<input type="text" value="0"/>
Price Per Item: 7.00 USD	

Make Your Hilton Hotels Requests Upon Arrival
Thank you for choosing Hilton Americas-Houston for your upcoming stay. Listed below is an assortment of amenities you can select from in advance of your check-in to make your stay more comfortable. Just click on your selection and indicate the quantity, and we will have the amenities waiting for you when you arrive. It's



“Listed below is an assortment of amenities you can select from in advance of your check-in”

Order your amenities by selecting a quantity next to each item, then click "Submit Order"

Requests Upon Arrival Items

Beer

	Quantity		Quantity
Bud Light (12oz. bottle)	<input type="text" value="0"/>	Corona (12oz bottle)	<input type="text" value="0"/>
Price Per Item: 6.00 USD		Price Per Item: 7.00 USD	
Shiner Bock (12oz bottle)	<input type="text" value="0"/>		
Price Per Item: 7.00 USD			

Wine



[Customer Support](#)
[1-800-HILTON](#)

Your order has been submitted

Thank you EWAN! Your order is summarized below:

Confirmation #: [3445581039](#)

Check-in: Monday, 10-Oct-2011

Check-out: Wednesday, 12-Oct-2011

Estimated Arrival Time: 3:00 PM

Order Summary

Description	Quantity	Price Per Item (USD)
Icelandic Glacier Spring Water 16.9oz.	1	8.00
Perrier Sparkling Water (11oz bottle)	1	6.00
Diet Coke (12oz can)	2	4.00

A Room Service delivery charge and applicable sales tax will be added to the retail price of all items. Additionally, 21% Gratuity will be added to your order.

[Change Order](#)

[Cancel Order](#)

[Terms and Conditions](#)



CONRAD
HOTELS & RESORTS



Garden Inn



HOMEWOOD
SUITES
BY HILTON



[About Hilton](#) [Site Map](#) [View Text Only](#) [Customer Support](#) [1-800-HILTONS](#)

[Hilton Worldwide](#) [Careers](#) [Franchise Development](#) [Press & Media](#)

[Privacy Policy \(Updated Sep 2011\)](#)

[Site Usage Agreement](#) ©2011 Hilton Worldwide

[Global](#)

[China](#)

[Germany](#)

[Japan](#)

[United States](#)

Choice Hotels does **\$1m** per
month through mobile

EasyJet does **£1m in 4 weeks** from their app



@easyJet
easyJet

We couldn't be App-ier! £1m flights
booked and 400k downloads all in just one
month. Thanks for all your support.

bit.ly/eJiPhone

750,000 downloads so far...

Atlantis Hotel introduces mobile booking for rooms & experiences

ATLANTIS
THE PALM, DUBAI

Book a Room

Each hotel room is designed with subtle oceanic and Arabic influences, complete with spectacular views of the azure waters of the Arabian Gulf or Palm Jumeirah itself.


Book Now

Book a Day Experience

Enjoy the thrill of Aquaventure water park, explore the dubai marine life of The Lost Chambers and make your dreams come true at Dolphin Bay. The waters of Atlantis await!

Book Now

[Main Menu](#) | [Contact Us](#) | [About Us](#) | [Privacy](#)
[Terms And Conditions](#) | [Full Site](#)



ATLANTIS
THE PALM, DUBAI

Step 1 Step 2 Step 3 Step 4 Step 5

Select a Time Slot

Showing times for The Royal Swim. Price is AED810 per person.

Sun 16/10

Select 02:10 PM


Mon 17/10

Select 02:10 PM

Tue 18/10

Select 02:10 PM

[Main Menu](#) | [Contact Us](#) | [About Us](#) | [Privacy](#)
[Terms And Conditions](#) | [Full Site](#)



ATLANTIS
THE PALM, DUBAI

Step 1 Step 2 Step 3 Step 4 Step 5


Confirmation

You have successfully selected **The Royal Swim** on the **Sun 16/10** at **14:10**. Please select whether to proceed and enter payment information or to go back and add more tickets or cancel existing ones.

Continue to payment

Select more or cancel tickets

[Main Menu](#) | [Contact Us](#) | [About Us](#) | [Privacy](#)
[Terms And Conditions](#) | [Full Site](#)



IHG does **\$10-12m** per month
through mobile

“Fastest growing revenue
channel is mobile”

1,000% increase in bookings from
mobile in 2010

Marriott does **\$25m/month** via
mobile

“India is 3% of that (\$750,000/month)”

70% of Priceline's mobile customers
are booking for **same-day check-in**

34 US cities now have 'tonight only' deals

Faster, cleverer, cheaper...

75% of Expedia's mobile customers
buy to check-in **within 24-hours**

Carl Sparks, CEO, Travelocity

- Mobile will be **30-40%** of our business in 5 years
- "You might get together with a bunch of friends and say, "Hey, we should really go to Vegas." And everyone leaves and forgets about it. With mobile, we **actually book it right then.**"

45 million Americans shopped
via mobile in June 2012

Thank you!

ewan@mobileindustryreview.com

@ew4n