

3 Mobile Marketing Stories: 2016 and beyond

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Who am I?

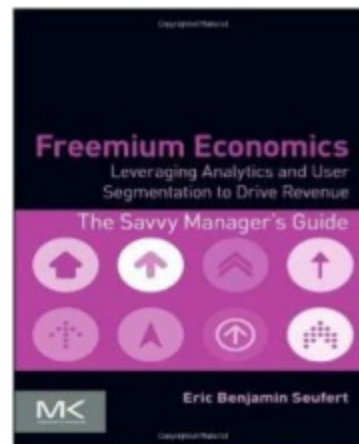
Who am I?



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Presentation Structure

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- **Story 1:** Rich Media

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- **Story 1:** Rich Media
- **Story 2:** Television

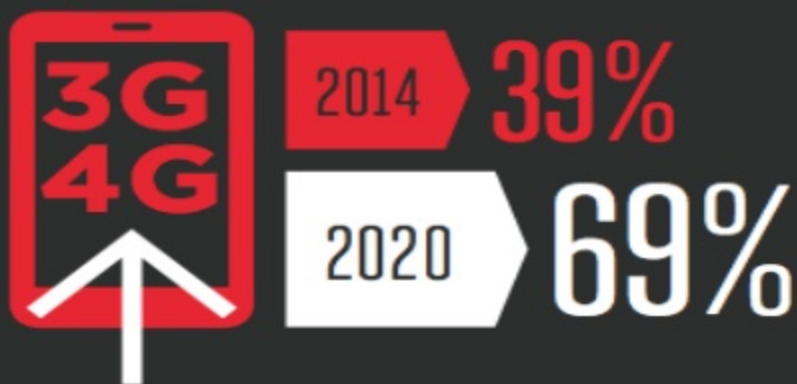
Presentation Structure

- **Story 1:** Rich Media
- **Story 2:** Television
- **Story 3:** China

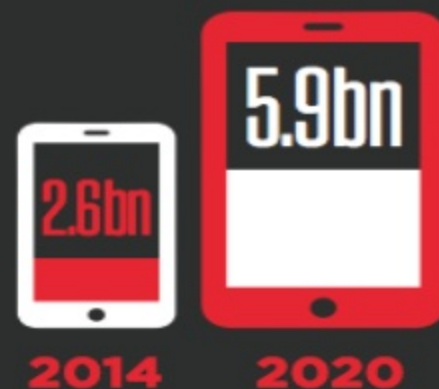
Story 1:
Rich Media

Mobile broadband networks and smartphone adoption

3G/4G CONNECTIONS



SMARTPHONES



Data traffic to grow
TENFOLD
2014-2019

Unique subscribers



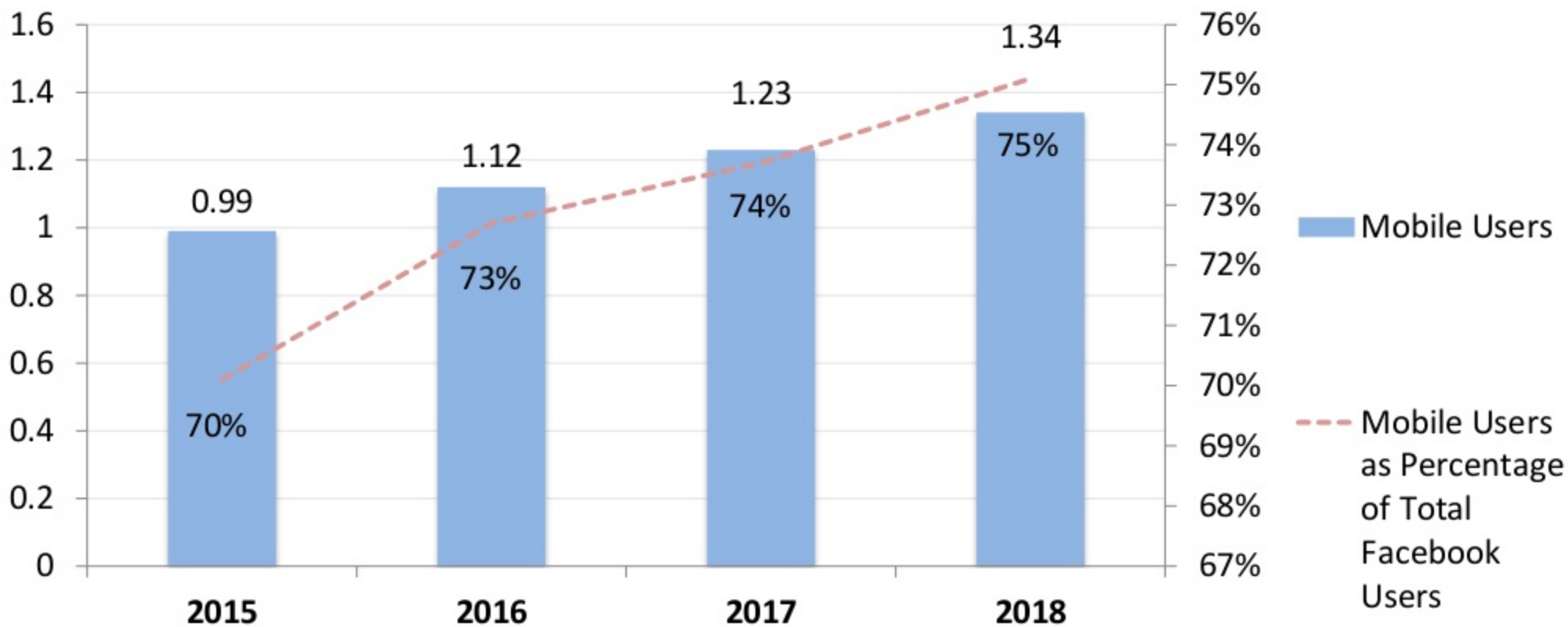
Global SIM connections



Region	Mobile Traffic Growth Examples
United States	As reported by CTIA, mobile data traffic grew 120% in 2013.
China	Mobile data traffic of China's top three mobile operators grew 83% from mid-2013 to mid-2014.
Japan	Mobile data traffic grew 43% from Q3CY13 to Q3CY14, according to Japan's Ministry of Internal Affairs and Communications.
India	Bharti Airtel reported mobile data traffic growth of 95% between 3Q 2013 and 3Q 2014. Reliance Communications reported mobile data traffic growth of 75% between 3Q 2013 and 3Q 2014.
Australia	As reported by Australian regulator ACMA, mobile data traffic grew 52% from mid-2013 to mid-2014.
Italy	As reported by Italian regulator AGCOM, mobile traffic in Italy in 3Q14 was up 45% year-over-year.
France	As reported by French regulator ARCEP, mobile traffic in France was up 107% from 3Q 2013 to 3Q 2014.
Germany	As reported by German regulator BNA, mobile traffic in Germany grew 71% in 2013.
Sweden	As reported by Swedish regulator PTS, mobile traffic in Sweden grew 32 percent from mid-2013 to mid-2014.
Korea	As reported by Korean regulator KCC, mobile data traffic increased approximately 36% between 1H13 and 1H14.
Other	Vodafone's year-over-year global mobile traffic growth was 80% from 3Q13 to 3Q14. Vodafone's European traffic grew 65% 3Q13 to 3Q14.

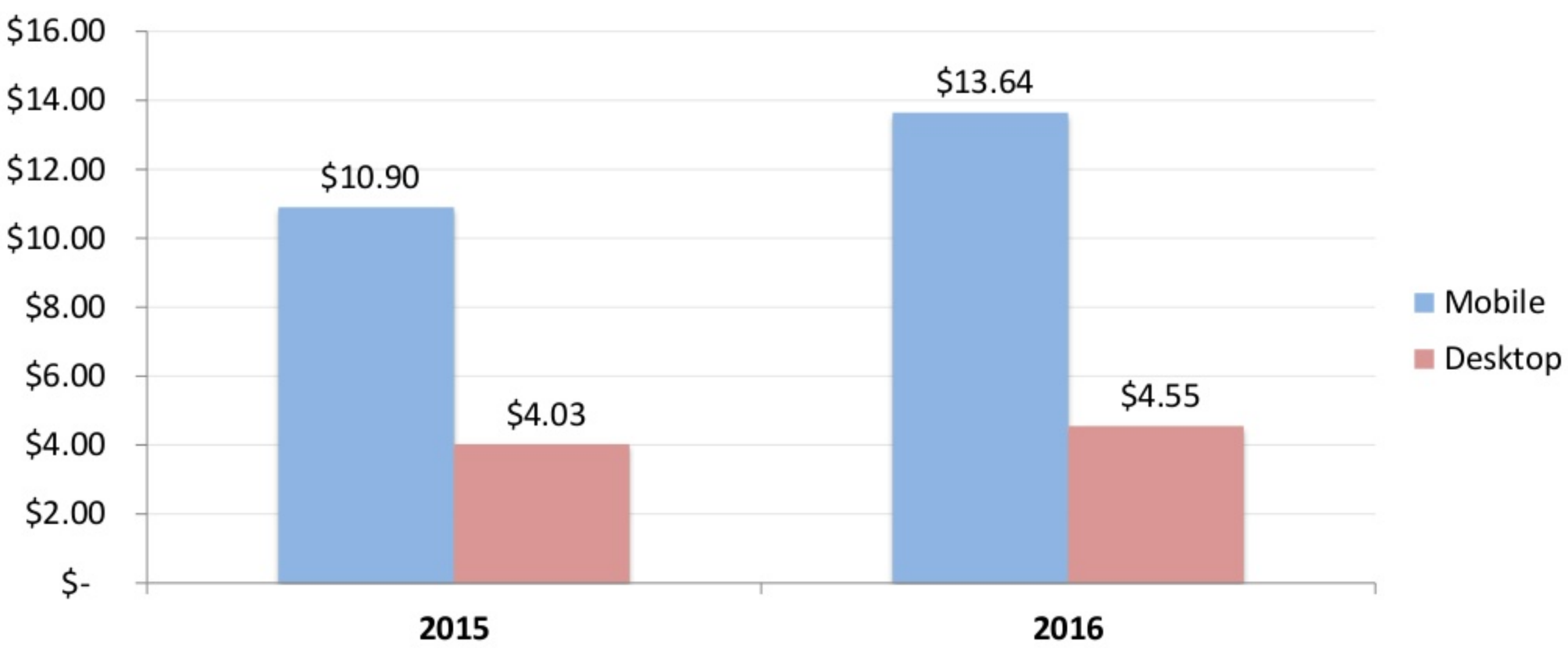
Facebook Mobile Users

2015 – 2018 (billions, projected)



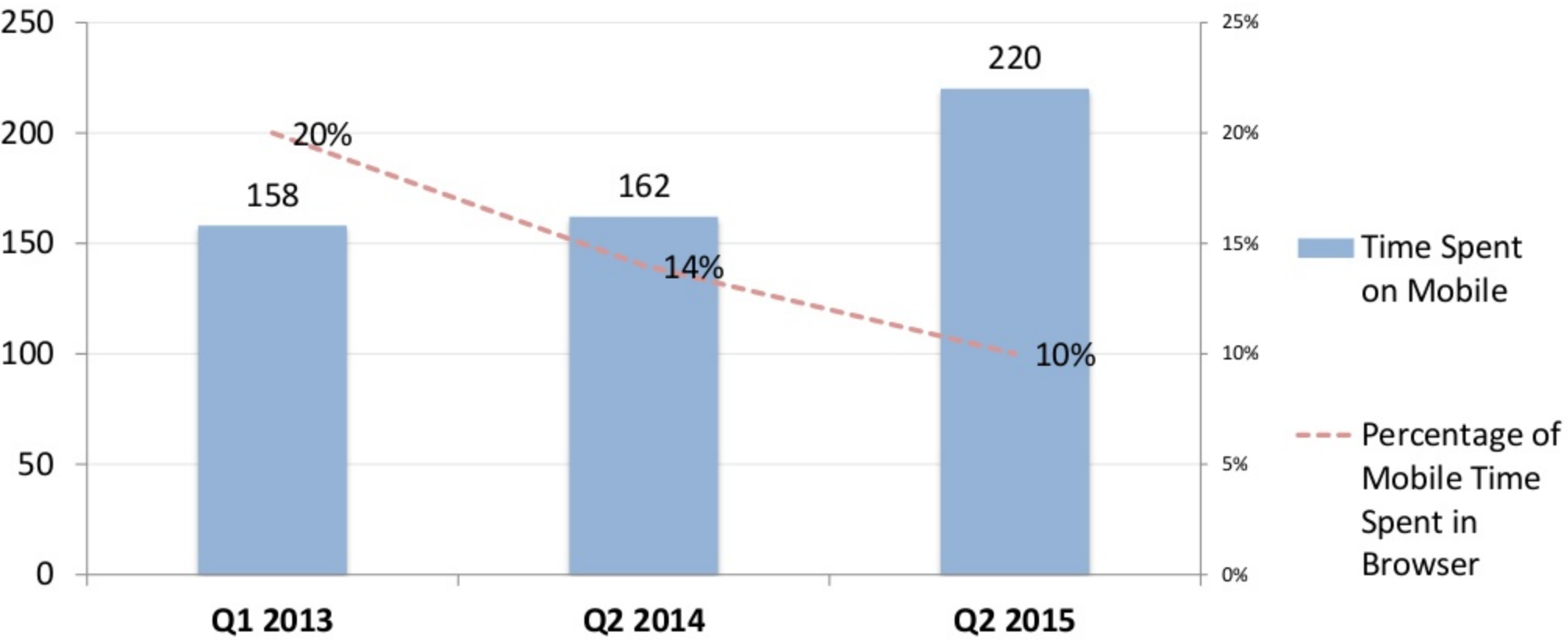
Facebook Worldwide Ad Revenue

2015 – 2016 (projection, billions)



Source: eMarketer

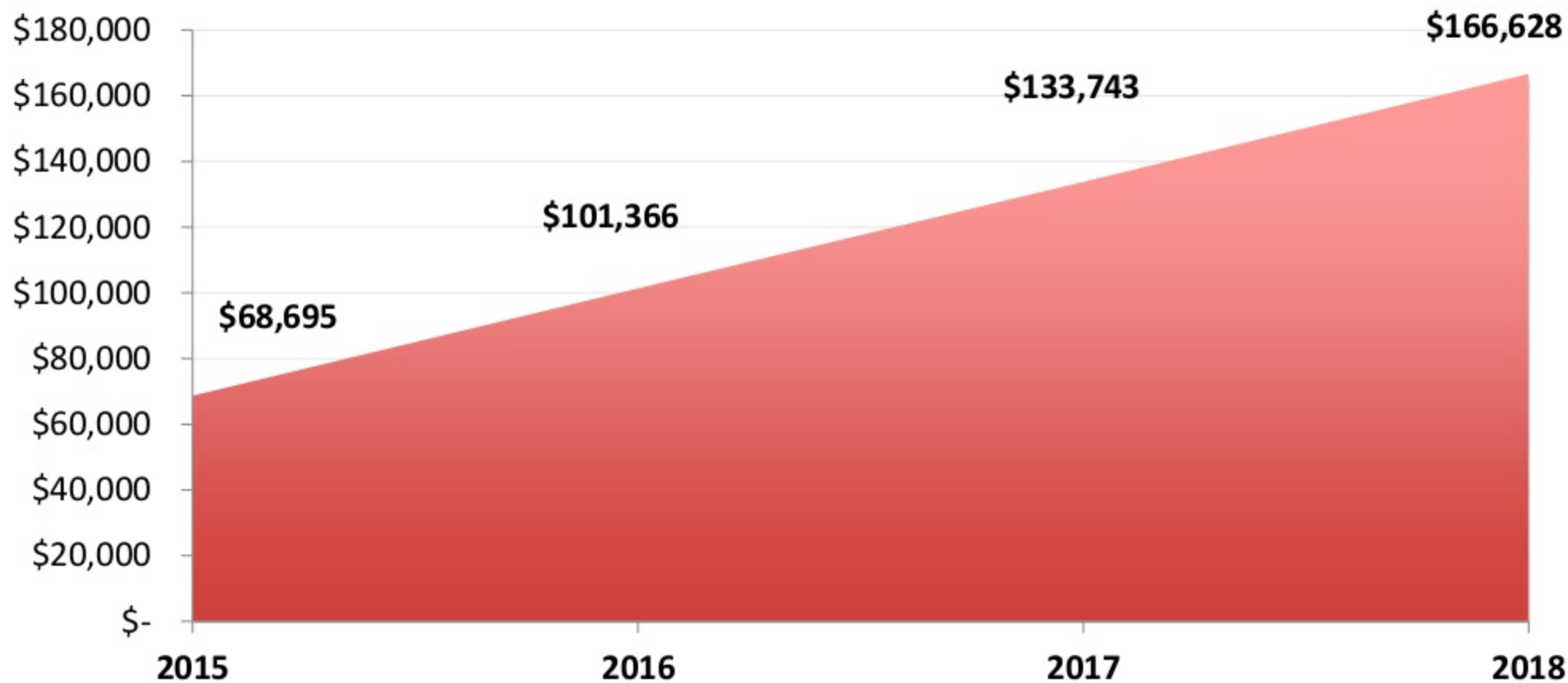
Time Spent on Mobile Devices (minutes per day)



Source: Flurry

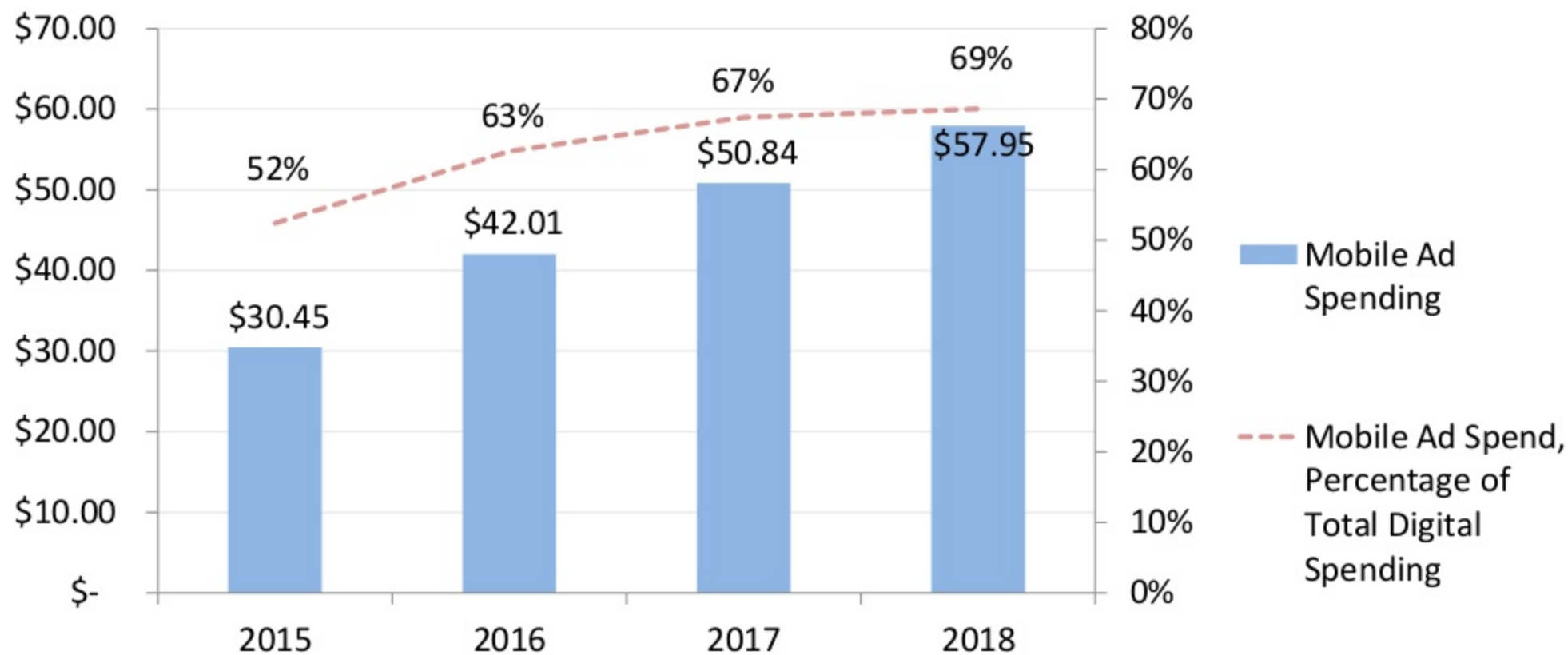
Global Mobile Advertising Spend (millions)

2015 – 2018 (Projected)



US Mobile Ad Spending

2015 – 2018 (projection, billions)



US Mobile Ad Spending

2015 – 2018 (projection, billions)



US Mobile Ad Spending by Sector (billions)

