

ICMA Mobile Panel

19.4.2013 Cologne

- 1) Comscore: Europe Digital Future in Focus 2013
- 2) Mary Meeker / KPCB: Internet trends 3.12.2012 @ Stanford

1.1B Global Smartphone Subscribers, 42% Growth, Q4:12 – @ Only 17% of Mobile Subscribers

Rank	Country	Q4:12	Smartphone	Smartphone	Q4:12	Smartphone	Smartphone
		Smartphone Subs (MM)	as % of Total Subs	Sub Y/Y Growth	Smartphone Subs (MM)	as % of Total Subs	Sub Y/Y Growth
1	China	270	24%	50%	16	Saudi Arabia	15
2	USA	172	48	50	17	Philippines	15
3	Japan*	78	65	11	18	Mexico	15
4	Brazil	55	20	35	19	Thailand	14
5	India	44	4	52	20	Turkey	13
6	UK	35	45	31	21	Malaysia	12
7	Korea	32	59	35	22	South Africa	11
8	Indonesia	27	9	36	23	Argentina	11
9	France	26	38	33	24	Netherlands	9
10	Germany	25	23	19	25	Poland	9
11	Russia	22	9	44	26	Sweden	8
12	Spain	18	30	14	27	Egypt	7
13	Italy	16	19	28	28	Iran	7
14	Australia	16	50	44	29	Taiwan	7
15	Canada	15	55	38	30	Hong Kong	6

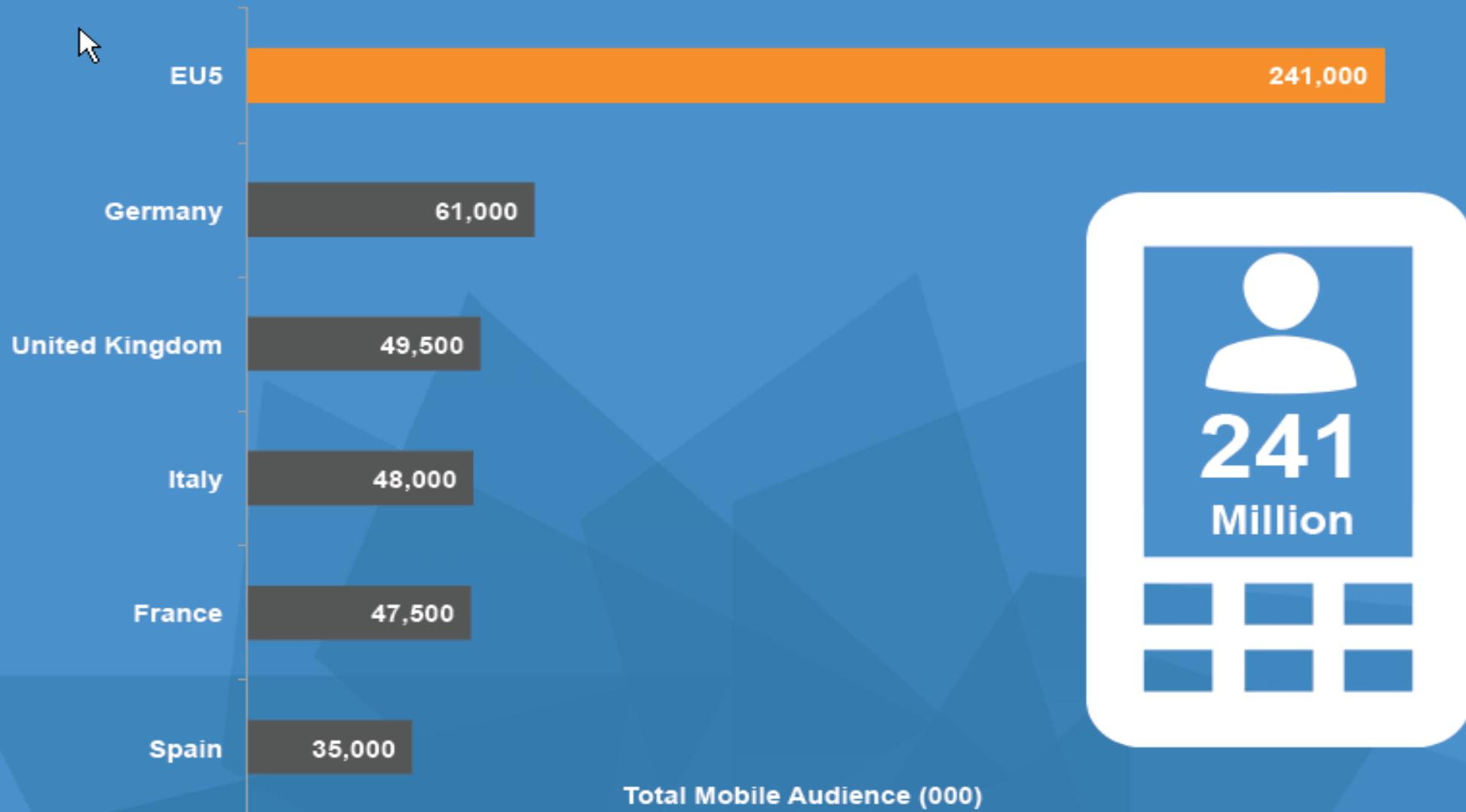
Global Smartphone Stats:

Subscribers = 1,142MM

Penetration = 17%

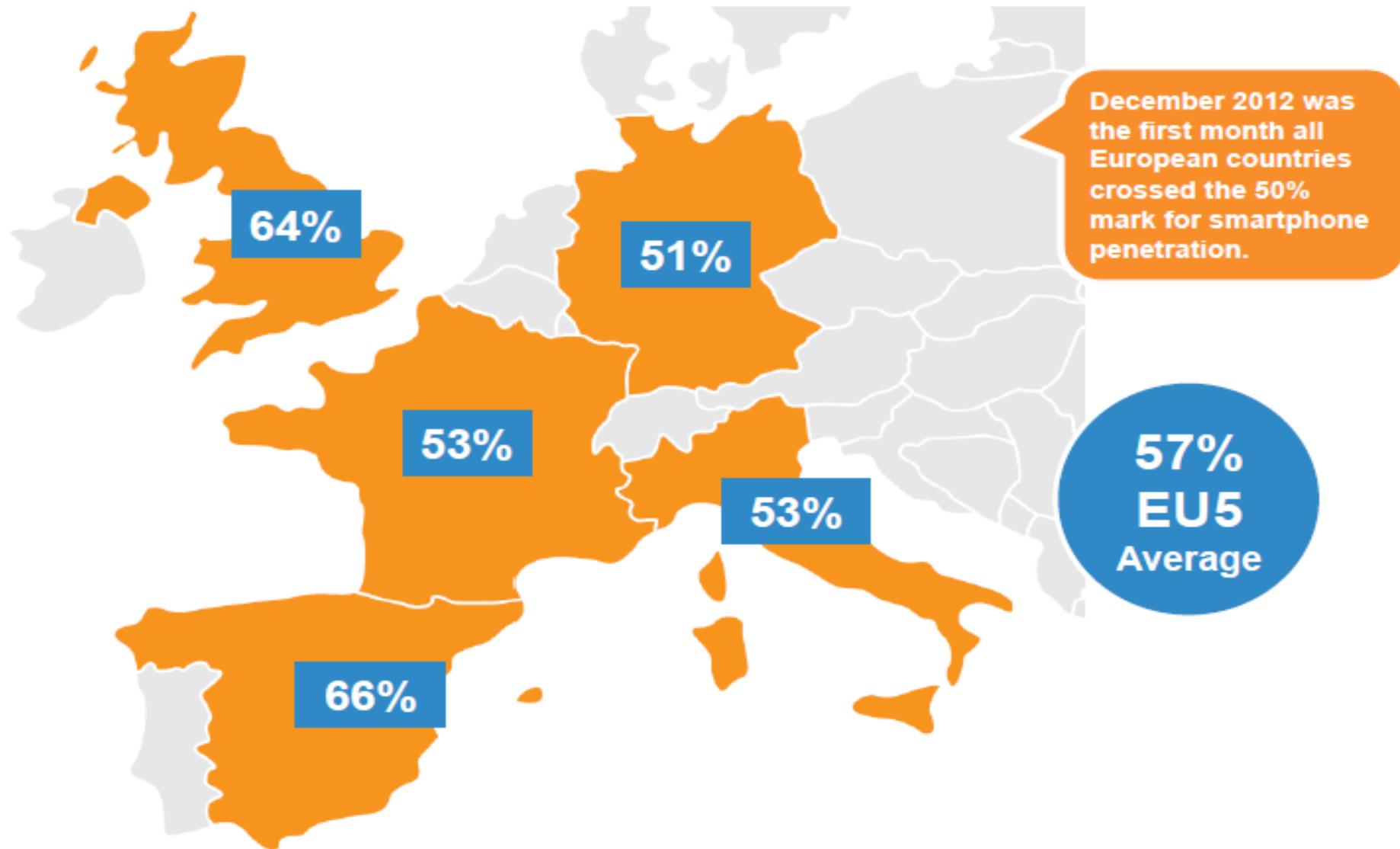
Growth = 42%

Mobile Audience in EU5 Crosses 240 Million Mark



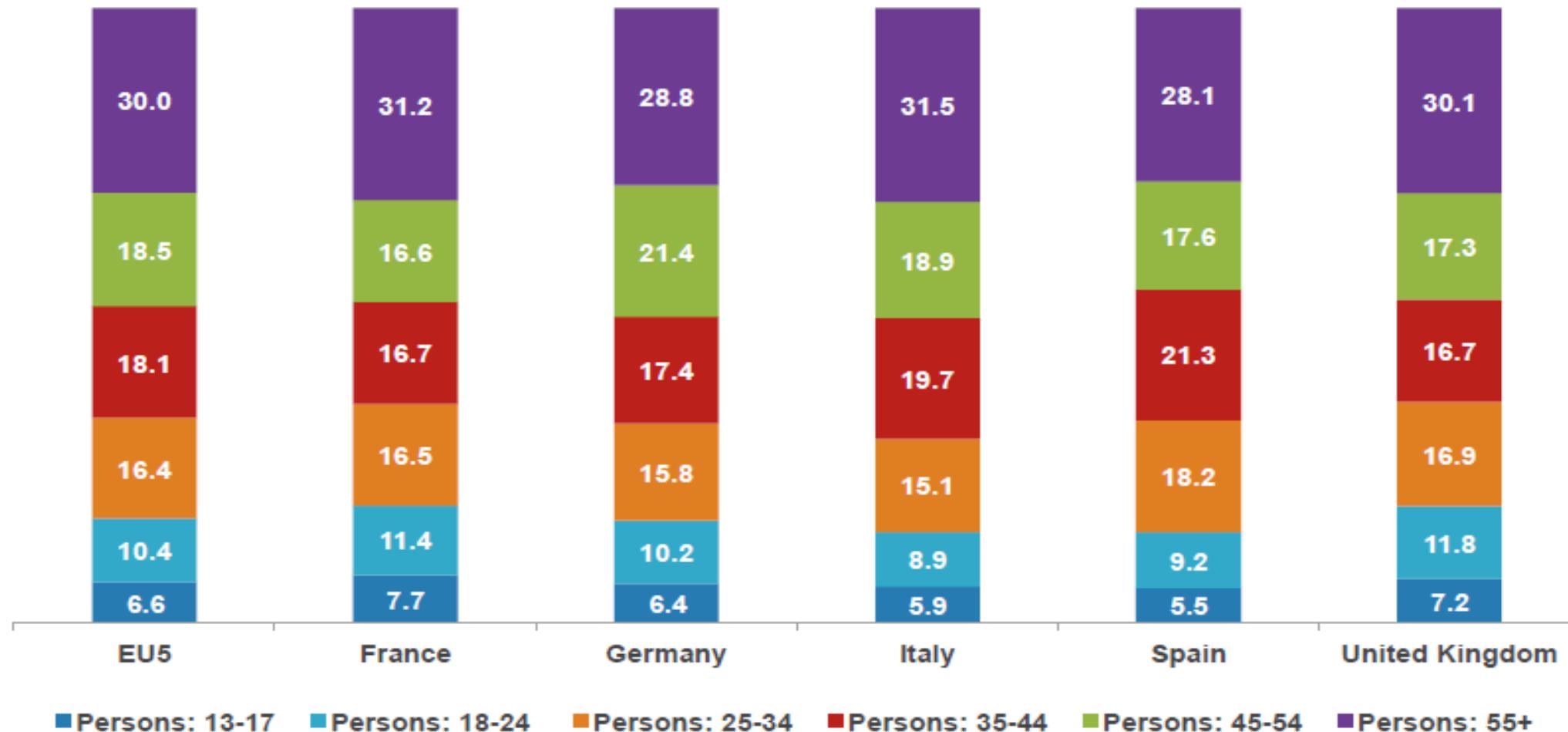
Smartphone Penetration in EU5 at 57%

Spain's Mobile Audience Shows Highest Adoption of Smartphones



A Third of EU5 Mobile Users Are Under 35 Years Old

Italy has Oldest Mobile Users with 50% over 45 Years of Age



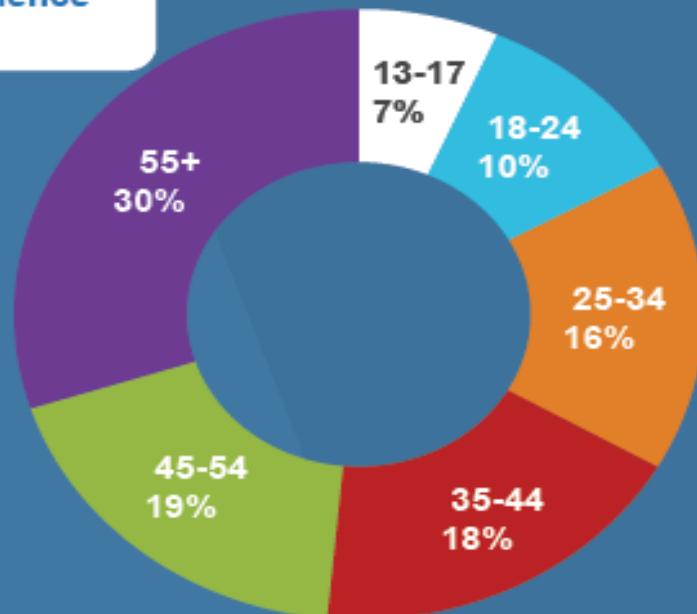
Profile: EU5 Mobile and Smartphone Audience

Typical Smartphone Owner: Male Between 25 - 44 Years Old

Total EU5 Mobile Audience: 241 million

Age Composition of Mobile Audience

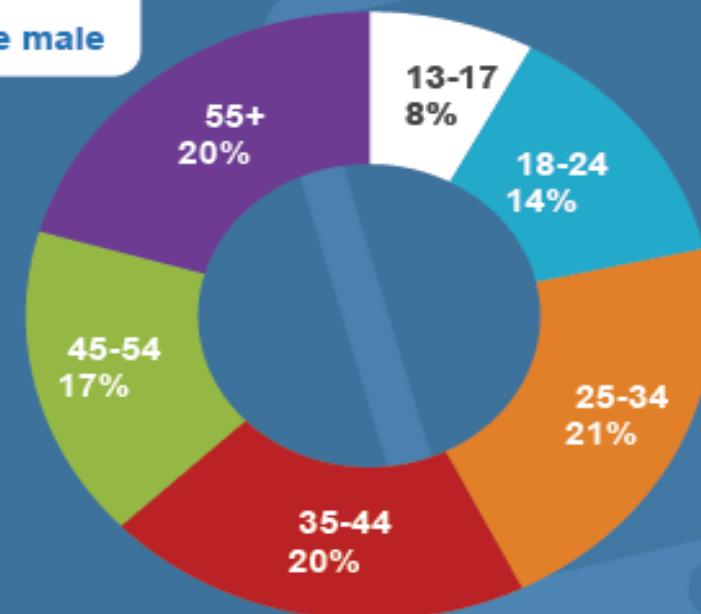
49% of EU5 mobile audience are male



Total EU5 Smartphone Audience: 136.2 million

Age Composition of Smartphone Audience

53% of EU5 smartphone audience are male



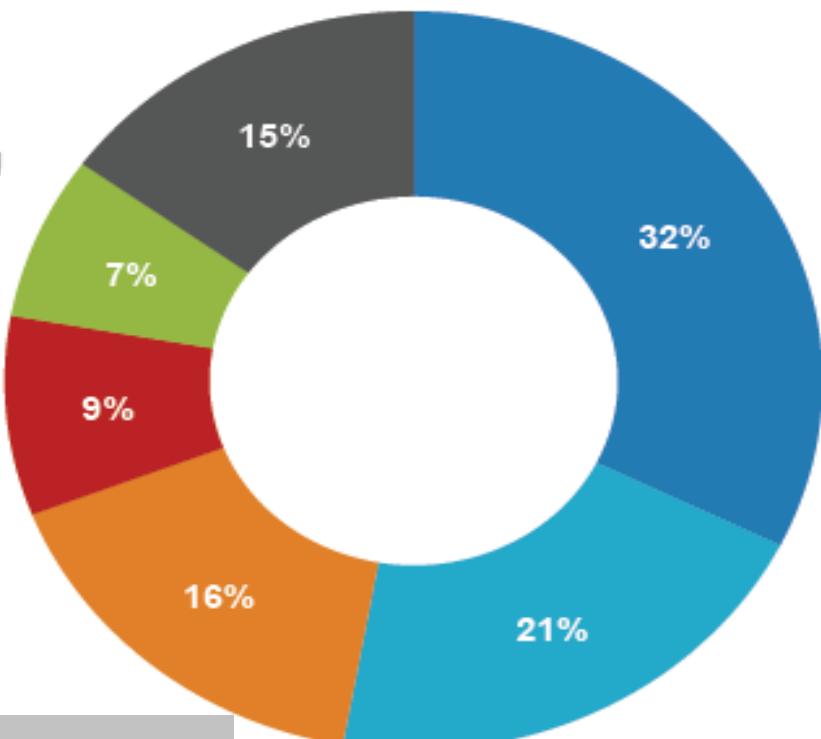
The Who is Who of the EU5 Smartphone Market

Leading Smartphone Handset Manufacturers and Platforms



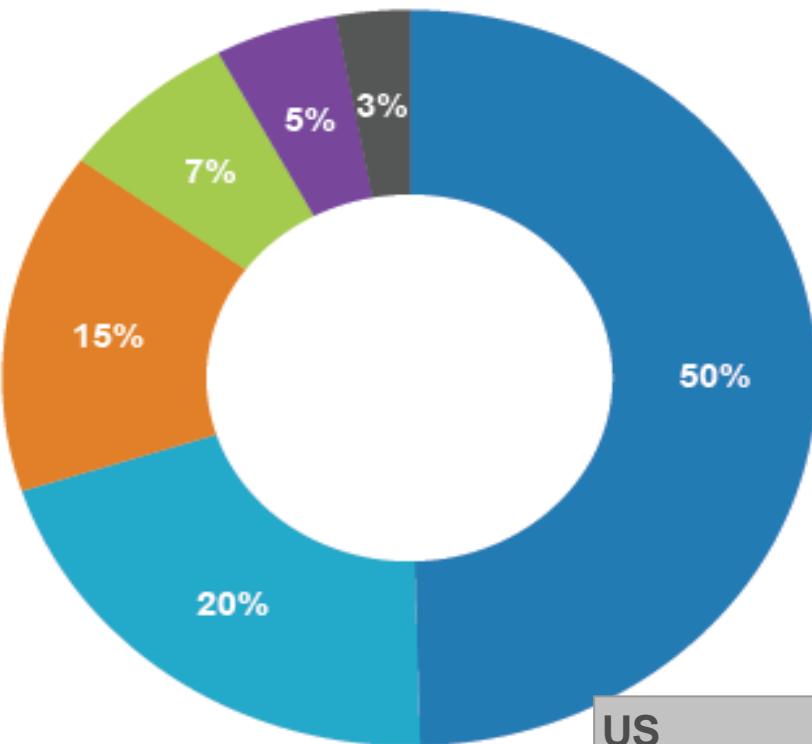
Top 5 Smartphone Handset Manufacturers (OEM)

- Samsung
- Apple
- Nokia
- HTC
- RIM
- Other



Top 5 Smartphone Operating System (OS)

- Google
- Apple
- Symbian
- RIM
- Microsoft
- Other



US

- Apple 39%
- Samsung 21%
- HTC 9%
- Motorola 8%
- LG 7%

MA Mobile Panel / ML Tuomola

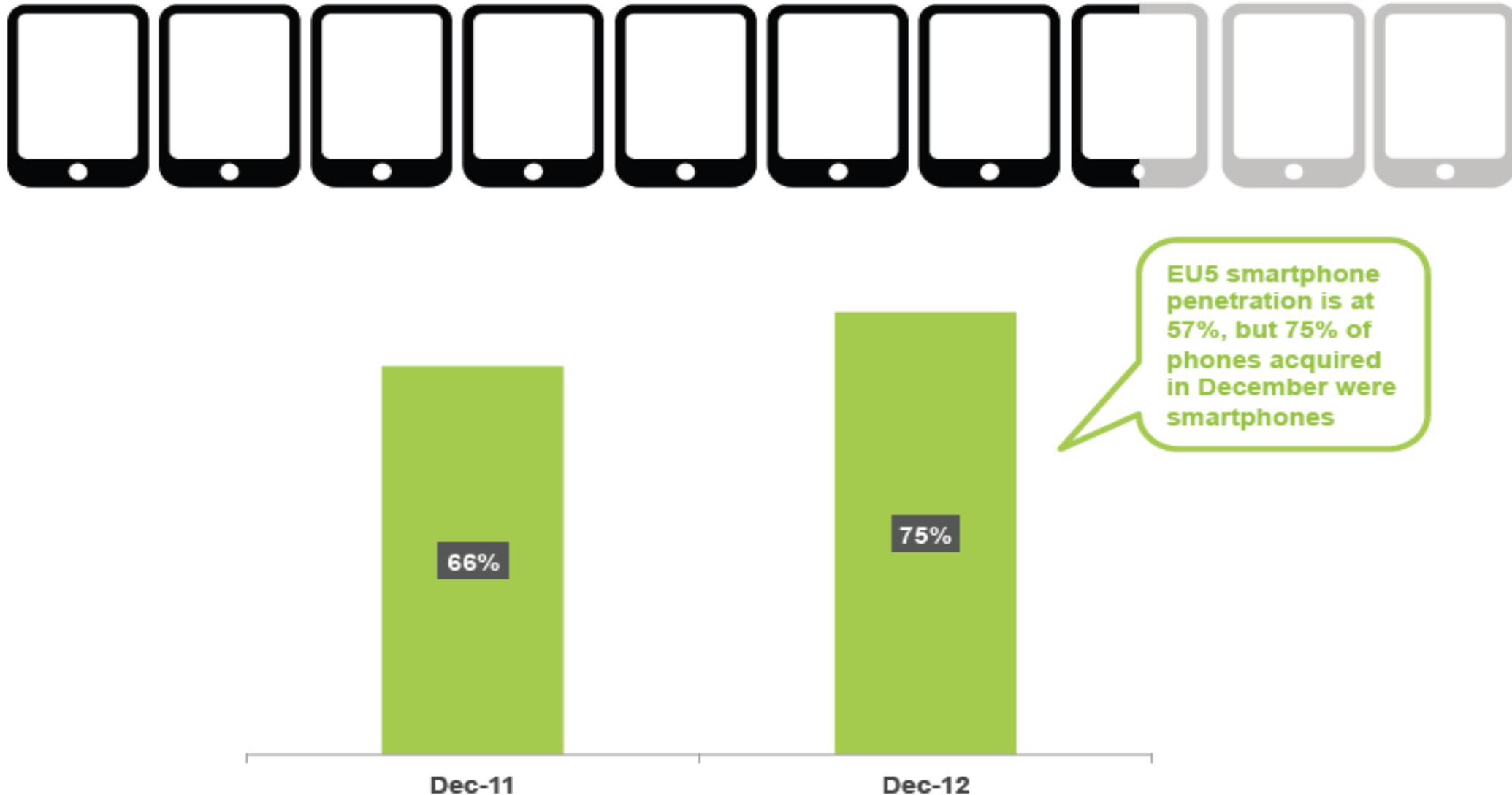
© comScore, Inc. Proprietary.

Source: comScore MobiLens, 3 month average ending December 2012, EU5

US

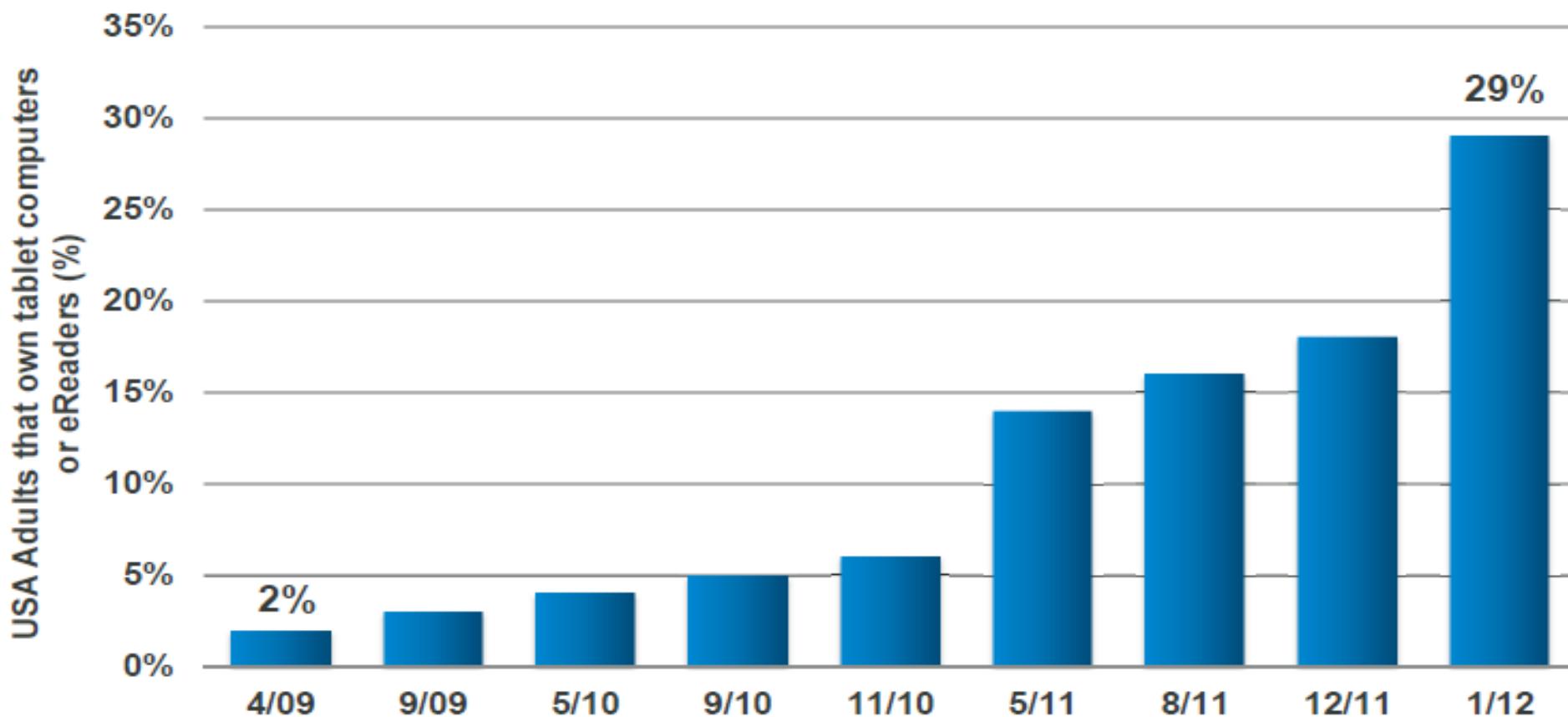
- Google 52%
- Apple 39%
- Blackberry 5%
- Microsoft 3%
- Symbian 0.5%

I In December 2012, 75% of Newly Acquired Devices were Smartphones

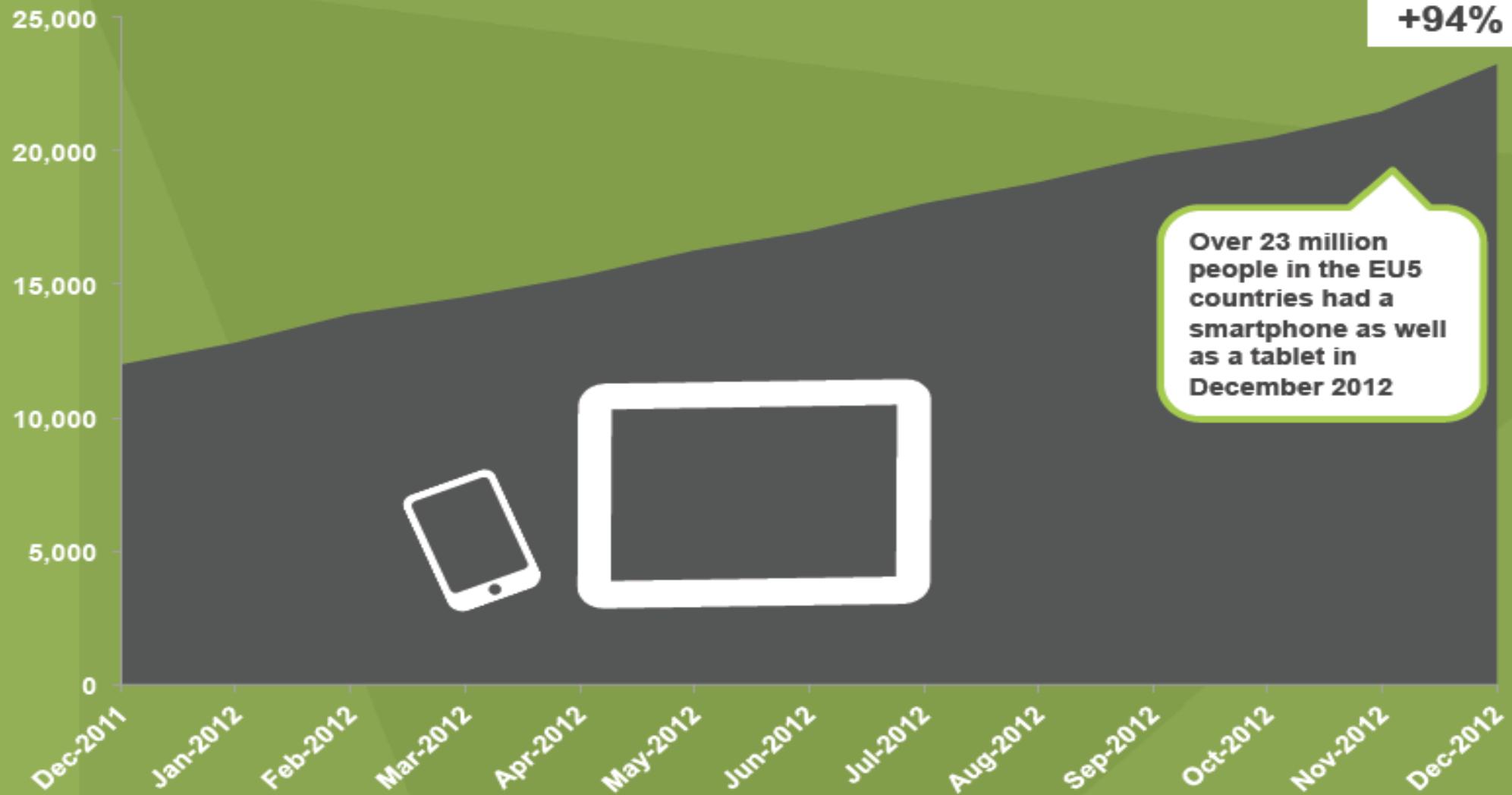


Impressive 29%+ of USA Adults Own Tablet / eReader, Up from 2% Less Than Three Years Ago

% of USA Adults Who Own Tablet Computers or eReaders, 4/09 – 1/12

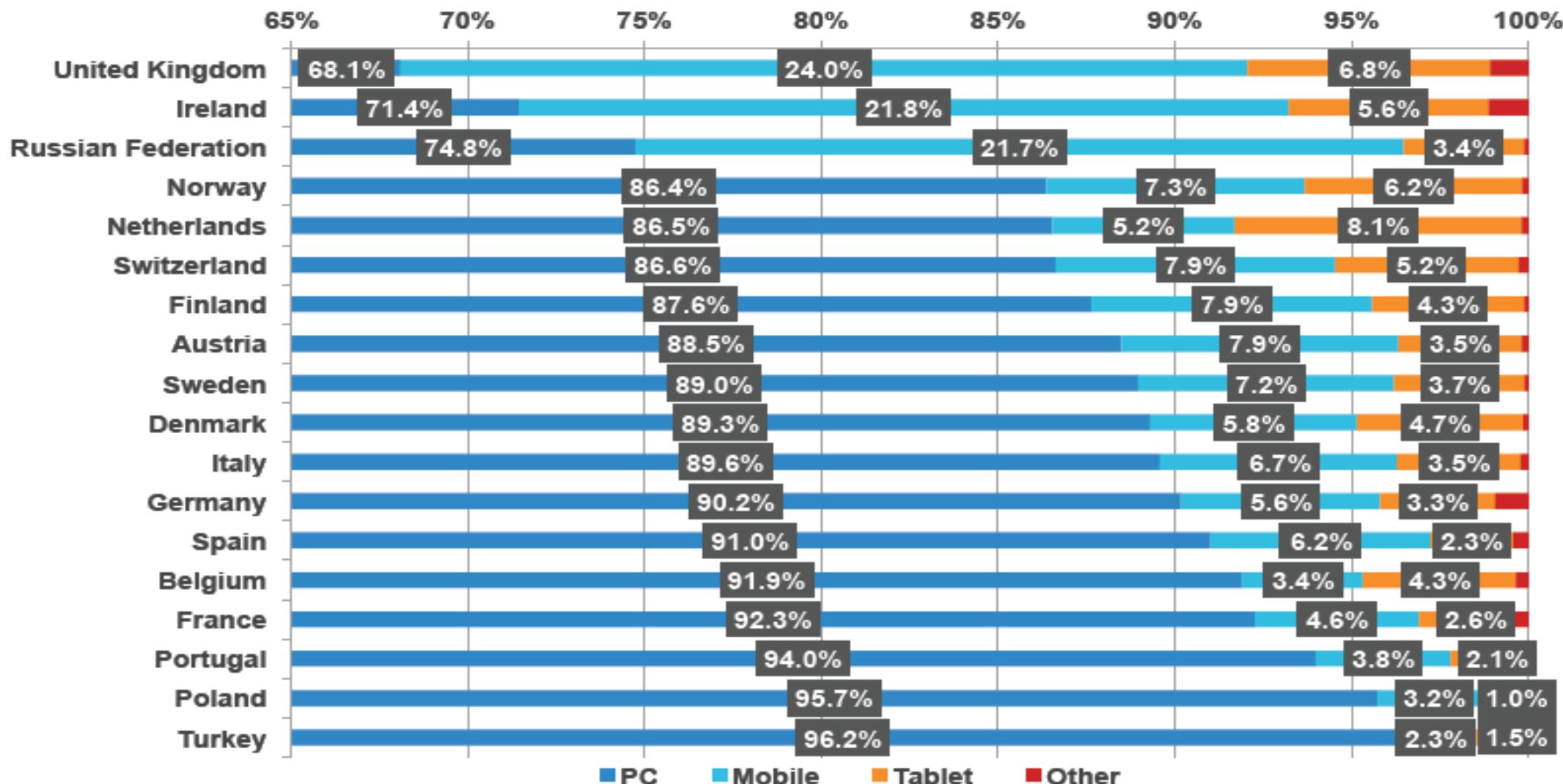


Tablets Are Here to Stay



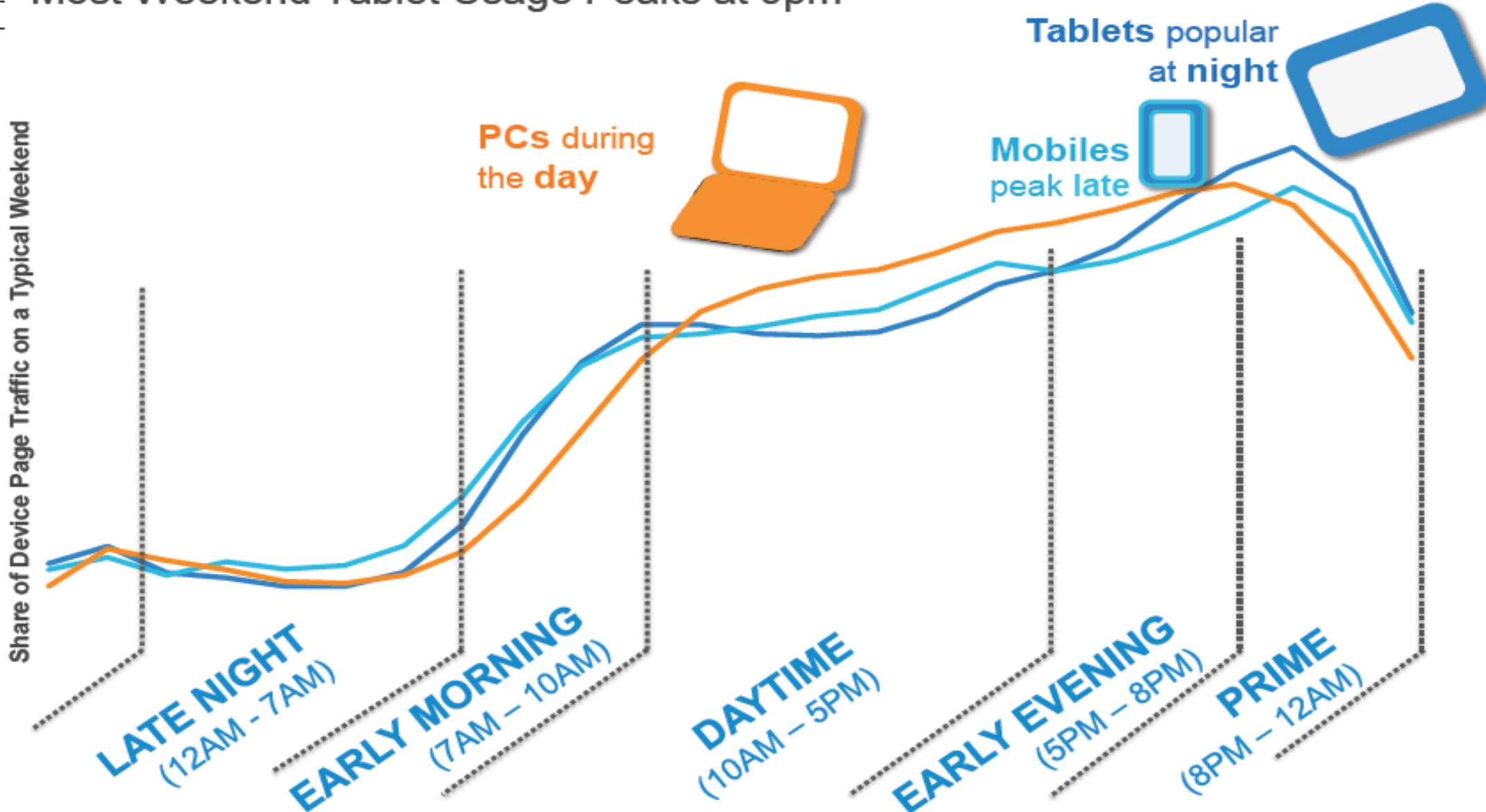
Device Share of Page Views Across Countries in Europe

Nearly 1/3 of UK Page Views are from Mobiles and Tablets



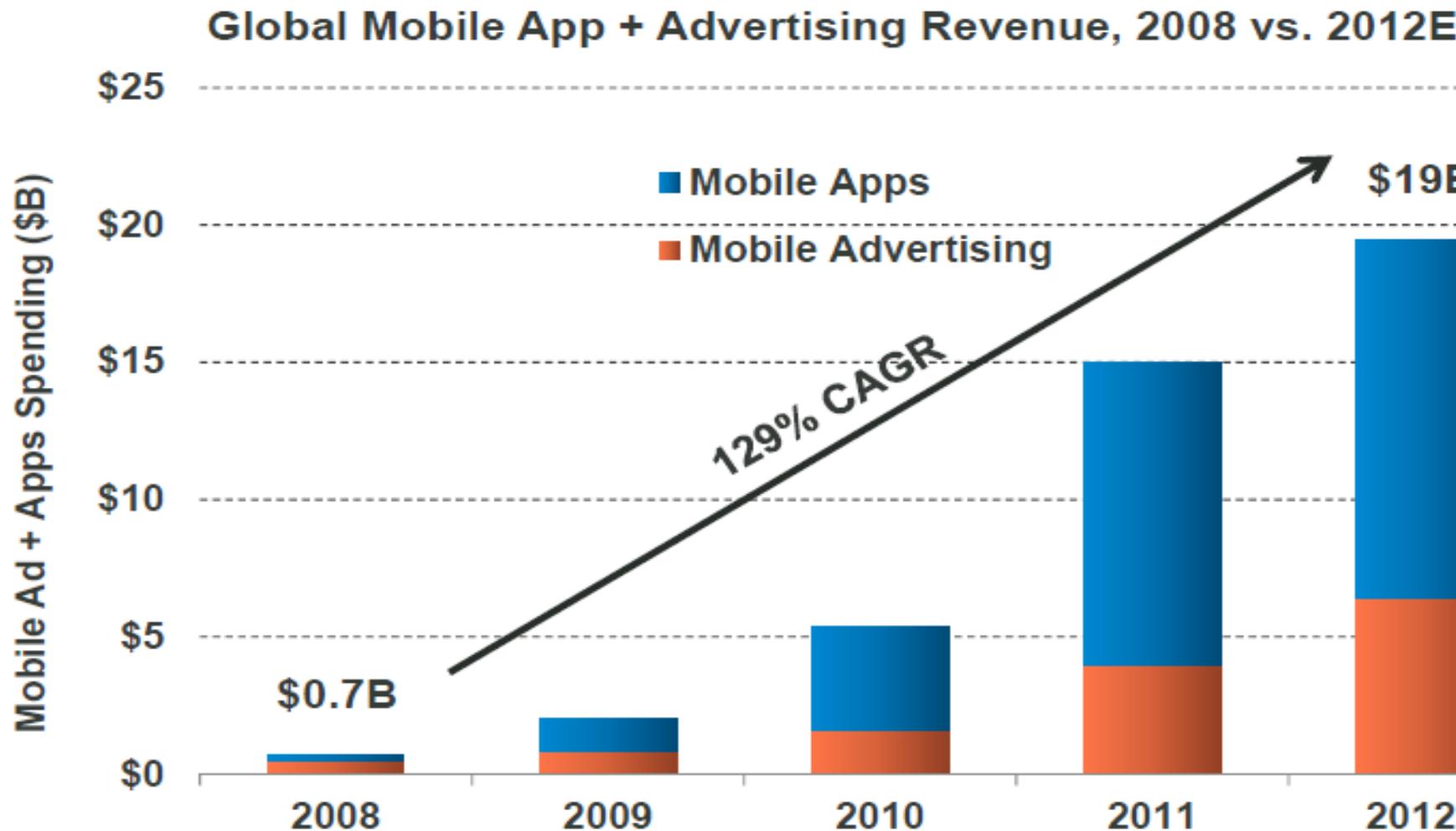
Device Preferences Throughout the Day in Europe

Most Weekend Tablet Usage Peaks at 9pm



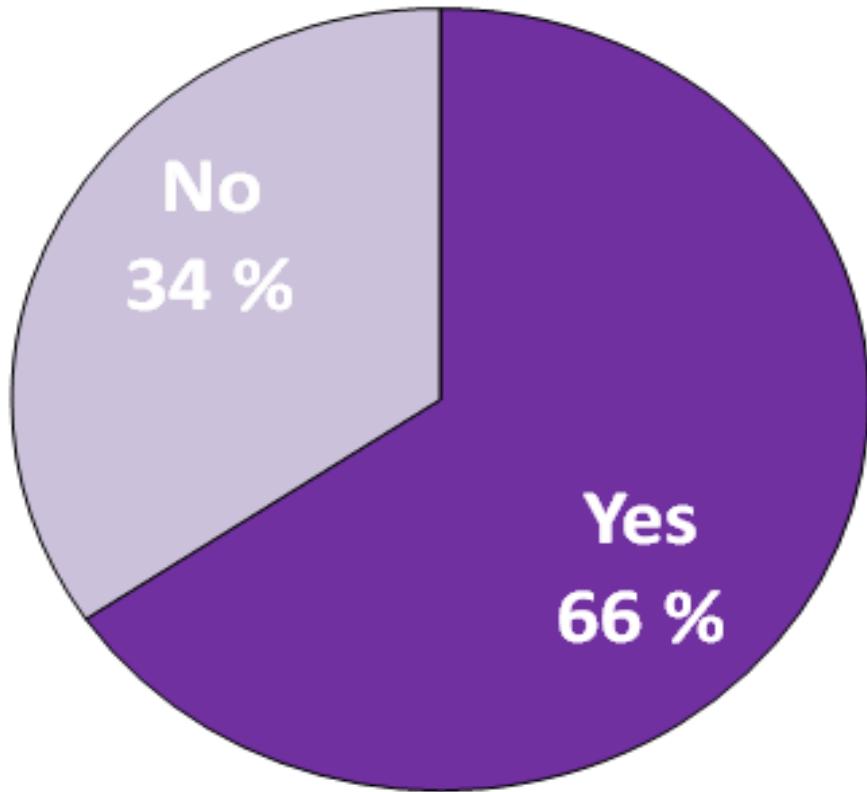
Mobile Monetization Growing Rapidly (67% Apps, 33% Ads)

+

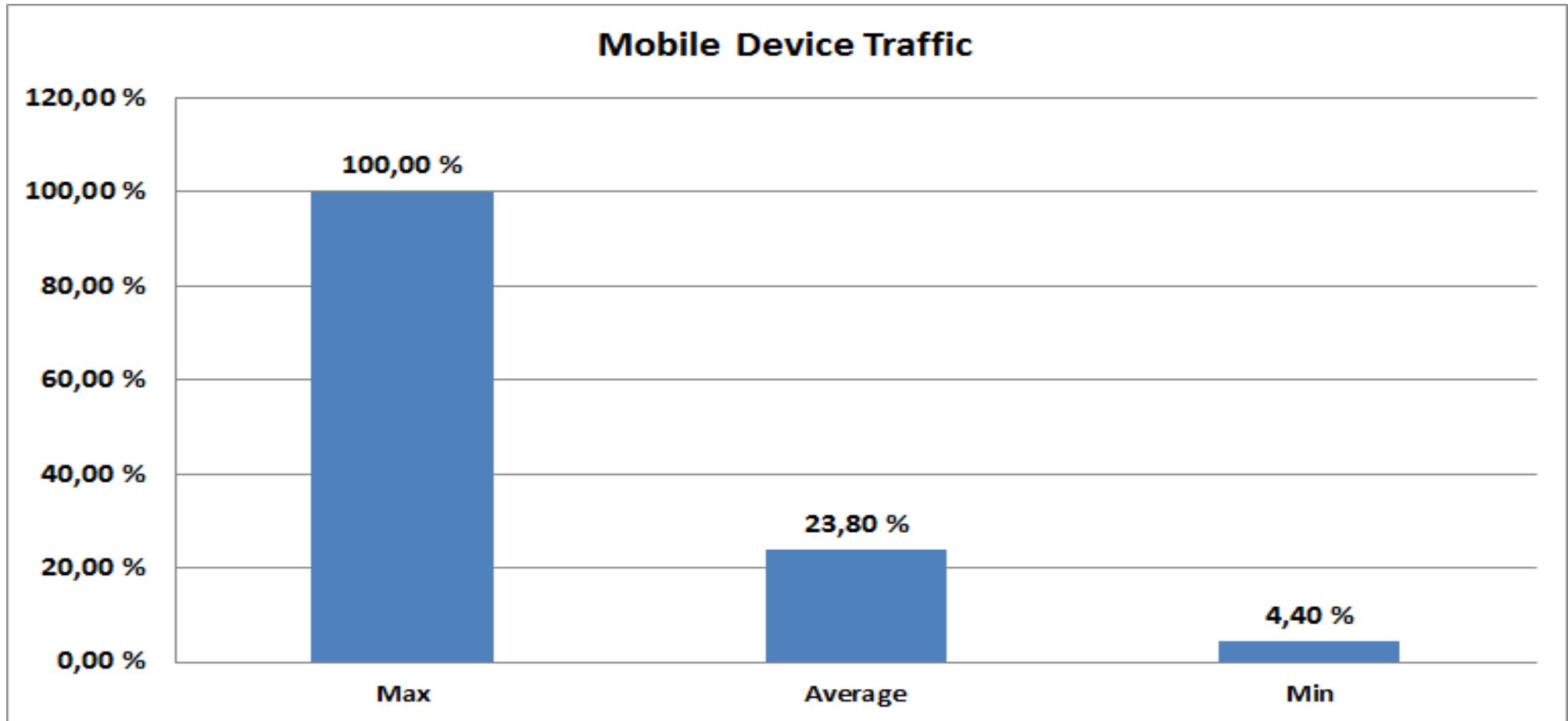


ICMA members...

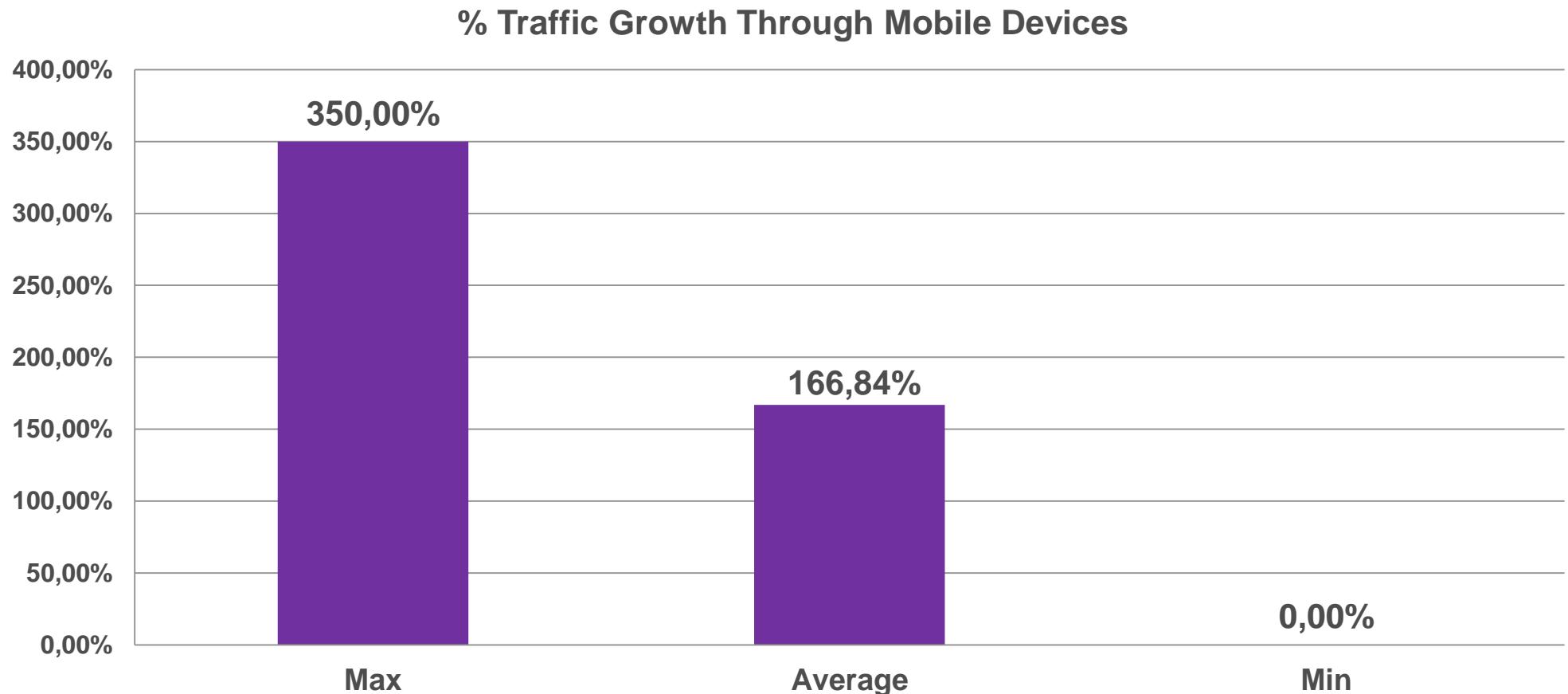
Is your website mobile ready / optimised?



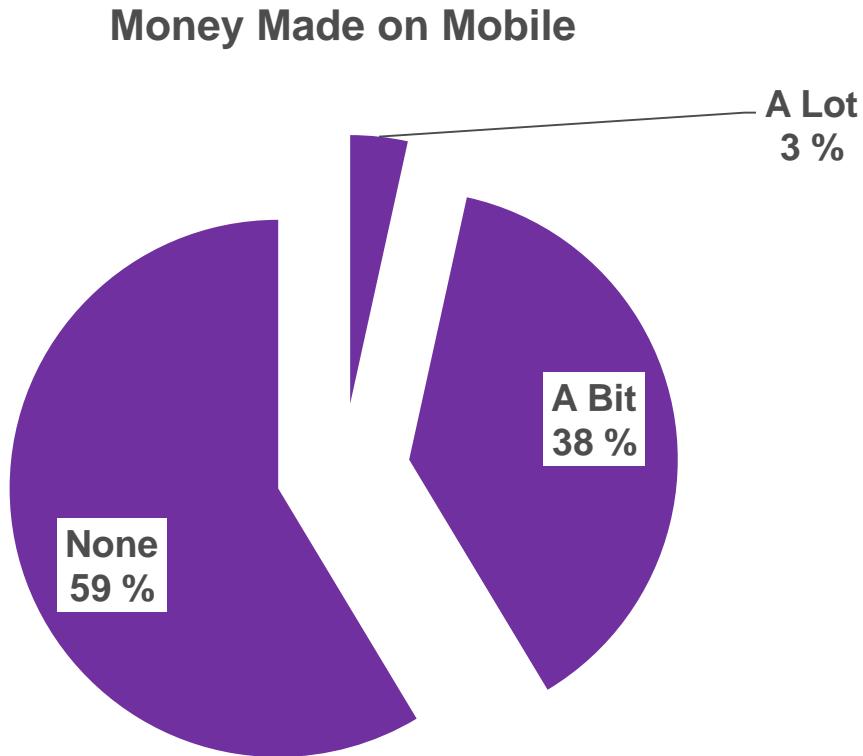
% of traffic from people browsing on mobile devices?



% of traffic growth from mobile devices? Q4 2011 - Q4 2012 (October-November-December)



How much money do you make directly from mobile?



ICMA panelists...

Martha de la Torre

CEO, El Clasificado, USA



Martha de la Torre is the president and CEO of EC Hispanic Media, a Los Angeles based company with headquarters in Norwalk, California. EC Hispanic Media is a multiplatform media company that has been connecting buyers and sellers in the U.S. Hispanic grassroots community since 1988. El Clasificado, the flagship print product has continued to expand despite industry trends while also adding new custom print, web, mobile and event marketing solutions to meet the demands of the growing U.S. Latino niche market. El Clasificado is an Hispanic Business 500 Company.

El Clasificado tiene los mejores Clasificados gratis de empleos, rentas, casas de venta, carros nuevos y usados. Puede publicar anuncios gratis y avisos gratis para compra venta de todo.



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¿Que está buscando?



Ciudades en California

Los Angeles
Orange County
Riverside County
Bakersfield
San Bernardino County
Fresno
San Diego County

Latinoamerica

Bogota
Lima
Cali
Medellin
Buenos Aires
Mexico DF
Quito

Ciudades en E.E.U.U

Miami
New York City
Houston
Las Vegas
Orlando
Chicago
Phoenix

más »

más »

más »



Autos y Carros
Nuevos y Usados
(10037)

Toyota Dealer (2290)
Ford Dealer (777)
Honda (553)
Honda Dealer (542)
Chevrolet (400)



Rentas y Arriendos
(1834)

Apartamentos (632)
Cuartos (500)
Casas (430)
Busco Rentar (92)
Edificios (74)



Casas de Venta (499)

Agentes de Bienes Raices (61)
Casas en Venta (195)
Casas Reposeidas (74)
Venta de Terrenos (21)
Servicios de Termitas (2)



Rob Paterson

CEO, Erento GmbH, Germany



Rob Paterson recently joined Erento, a marketplace for anything you can rent. Erento was launched in 2003 and quickly grew to be the world's leading online rentals business. Rob has close to 30 years experience in the classified business and has been developing online businesses almost since the beginning of the web helping Friday Media Group make the transition from print to online through product launches and acquisitions. Rob speaks at many conferences around the world and has in the past served as Chair of the ICMA.



I would like to hire a

in

All categories ▾

How it works ▾

List items now

My erento ▾

Rent cheap instead of buying expensive

Explore our categories

Tools

Carpet Cleaner, Floor Sander, Sack Barrow, Pressure Washer, Lawn Scarifier, Wood Chipper, Laser Level, Gas Heater

Vehicles, Boats & Aircraft

Motorhome, Car, Trailer, Mercedes, BMW

Parties, Tradefairs & Events

Venues, PA, Projector, Chair, Table

Construction Machines & Building Site

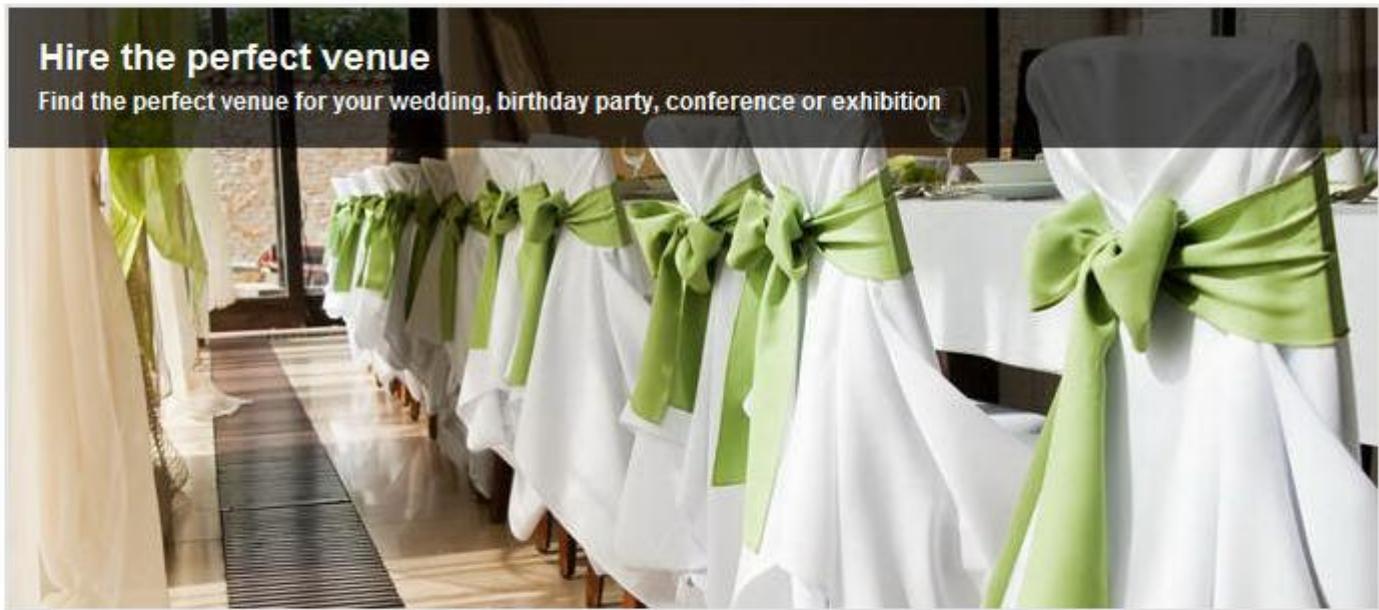
Mini Digger, Ladder, Scissor Lift, Scaffold Tower, Power Float, Generator, Transformer

Photo, Film, Audio & Video

Television

Hire the perfect venue

Find the perfect venue for your wedding, birthday party, conference or exhibition



Armin Strbac

Co-Founder, Shpock, Austria



Armin Strbac is co-founder of Shpock – the mobile yardsale app for beautiful things. Shpock launched in Austria and Germany in September 2012 and since then has grown rapidly.

Before becoming a founder Armin worked internationally in the consumer goods and telecommunications industry, which also were the main industries he covered during his time as management consultant.



shpock

With Shpock - the mobile yard sale for beautiful things - you'll find the most beautiful things in your neighborhood and sell your things quickly to other people around you.

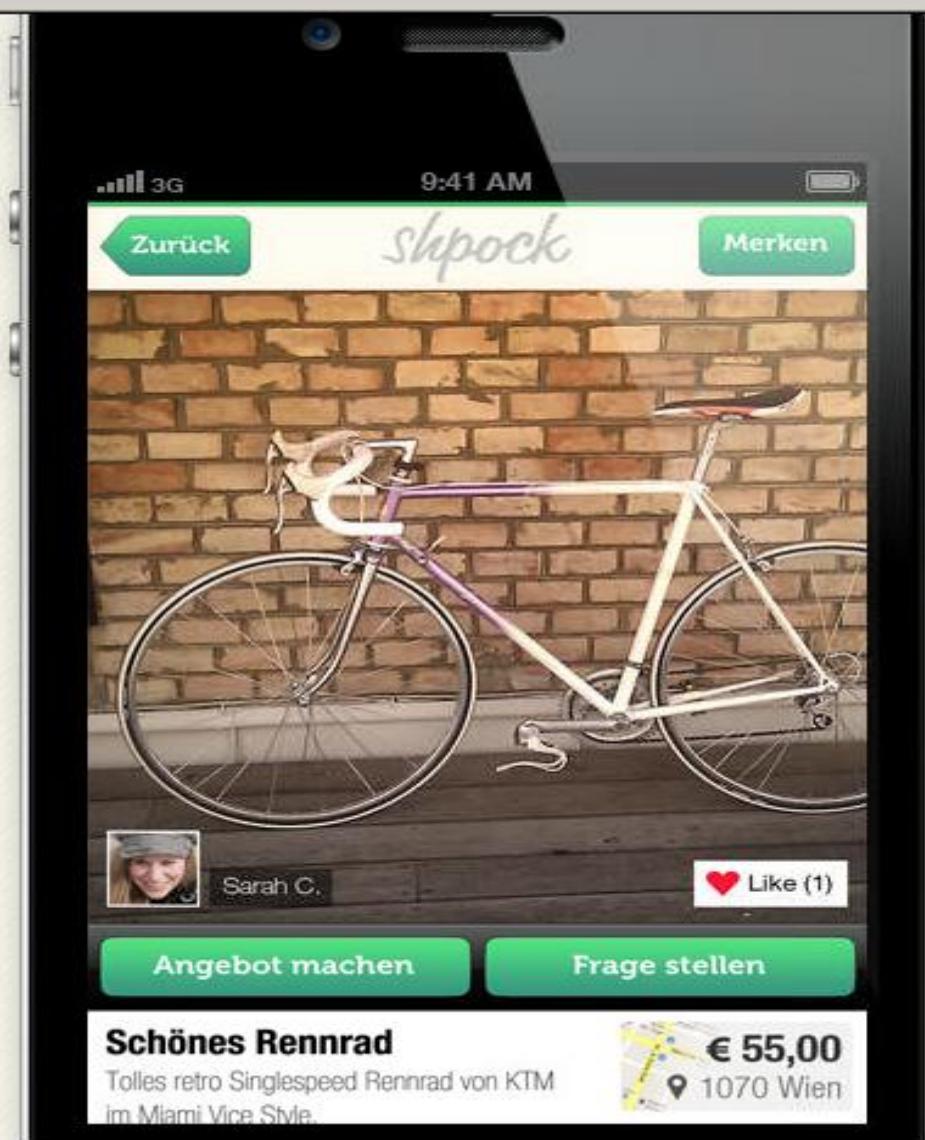
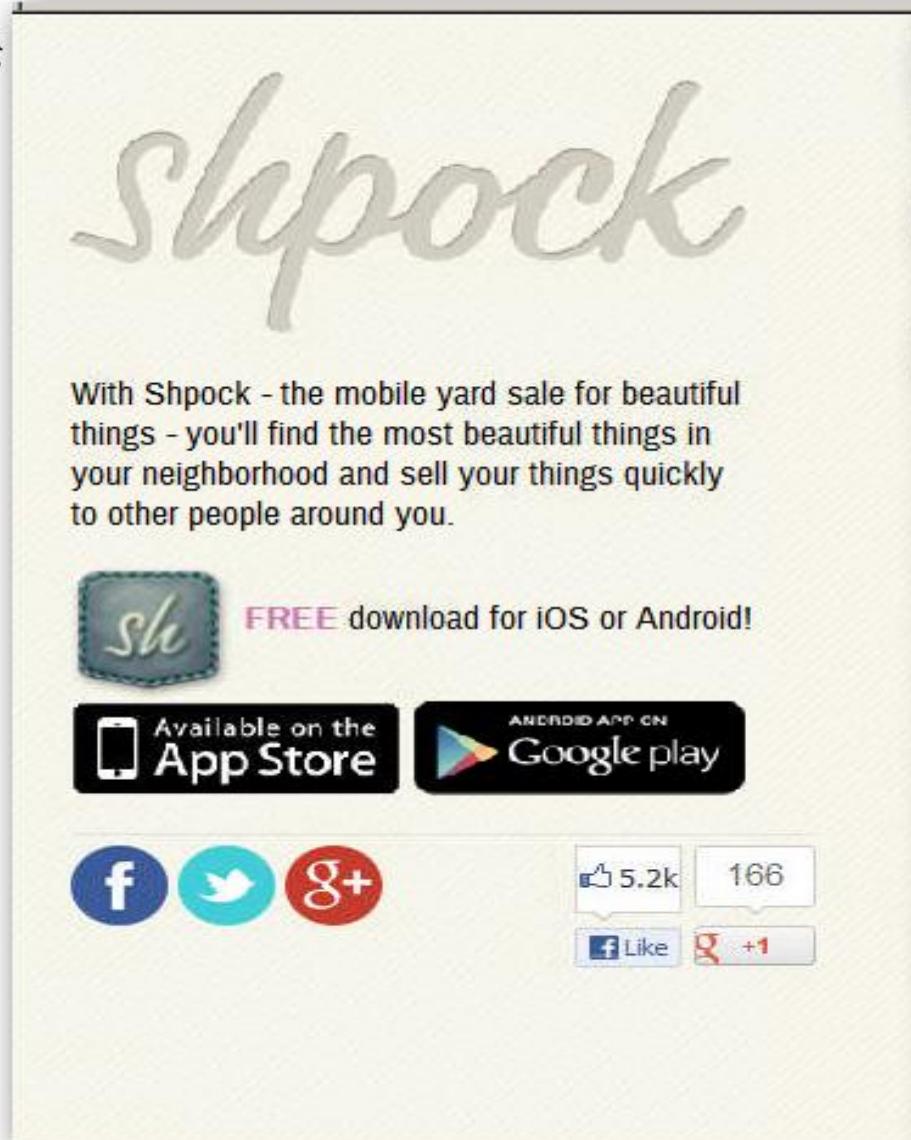


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Ed Moore

Partner, Ocasta Labs, UK



Ed Moore is the co-founder of Ocasta Labs, a mobile data consultancy and developer of Needz the new 'mobile first' classifieds service.

Ed has been working in mobile data since the beginning. Firstly as CTO of the Phone House Group (now part of Best Buy) then as CEO of WiderWeb whose gateway for mobile web optimisation was acquired by mobile pioneer Openwave. Ocasta Labs has been providing mobile development expertise to blue chip clients since 2009 while continuing to develop its own product concepts.

Needz
Classifieds

By Ocasta Labs

Open iTunes to buy and download apps.

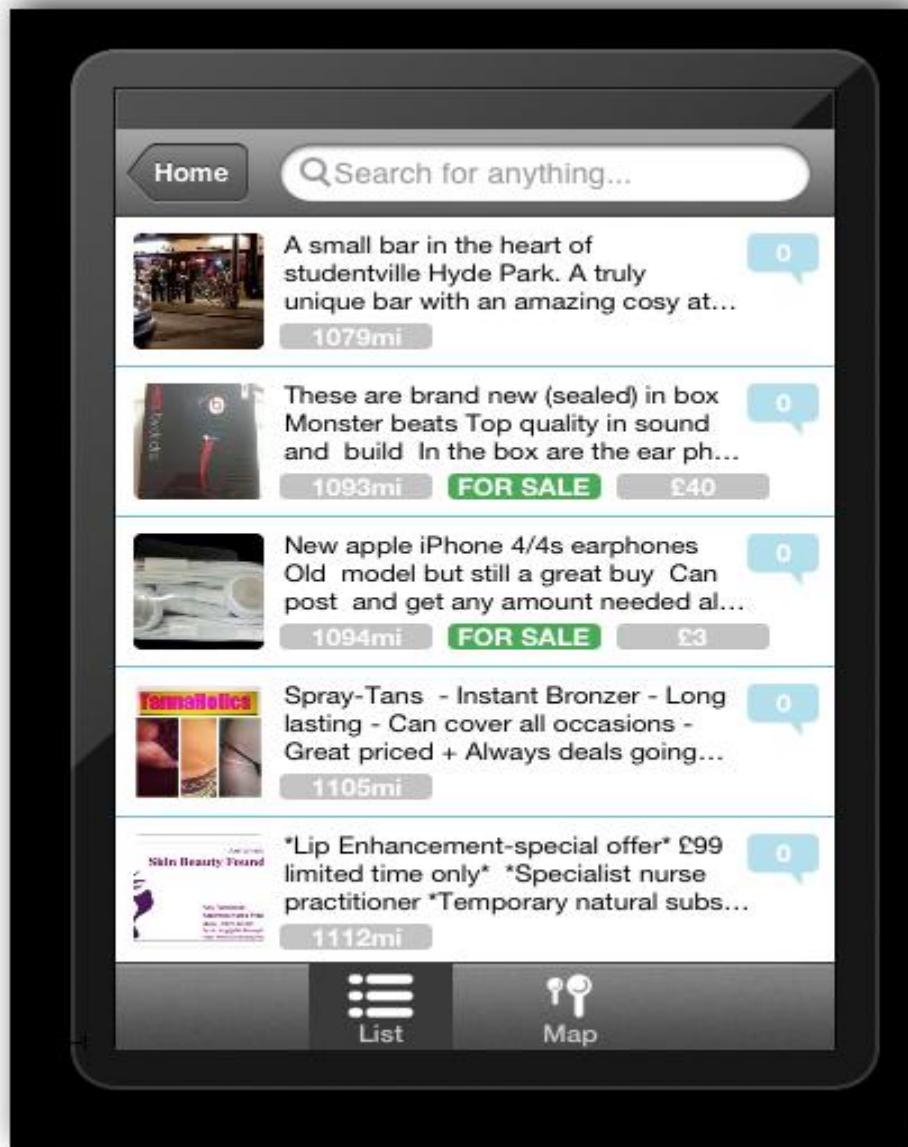


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Updated: Feb 21, 2013



Gavin Burnett

CEO, Moboom, Australia



Gavin has experienced classified media from almost every angle – from development and commercialization of proprietary technology, licensee of classified products and as a digital publisher with a major media company.

In 1999 he started multi-award winning tech company BigRedSky which provided online recruitment solutions to government and corporate clients. The company was later bought out by Thomson Reuters. For three years he was head of Digital at a major Australian media company where he was responsible for news and classified strategy and implementation.

Marja-Leena Tuomola

President, Sanoma Digital Finland, Finland



Marja-Leena Tuomola has been a member of the Management Group of Sanoma News since 2008. She is responsible for the Sanoma Digital Finland business unit (digital marketplaces, online classifieds, online casual games) of Sanoma News in Finland and the Baltics. The assets include i.a the leading C2C marketplace and auction site [Huuto.net](#), the leading real estate and jobs classified website [Oikotie.fi](#), the leading DIY construction website [Rakentaja.fi](#), price and product comparison Hintaseuranta.fi and the leading car classified website [Auto24.ee](#) in Estonia. She is also the chairman of the board of Netwheels Ltd offering tailored digital services to car dealers.

Questions?

Questions

- Strategy
 - What is your mobile strategy?
 - Are your company "mobile first" or are you still in the "digital first" phase?
 - Ed , you are working with mobile first classified services, Needz. What is your advice? Can you "go mobile" just by creating an app? NO, what else you have to change in our business?
 - Armin what is your strategy?
- Customers
 - Are our BtoB customers (car dealers , real estate agents, recruiters) ready for mobile services? Do they have e.g. landing pages? Should we offer turn key solutions (also mobile landing pages) to our B"b customers, especially small and medium sized customers?
 - For incumbents: Why are you going mobile: to improve user reach or to improve usability to existing customers?
 - Many of the new servces are targeted to the younger mobile generation. What should we do?
 - Armin, you represent the both new generation of entrepreneurs and consumers...

Questions

- Product development
 - What is your approach towards different mobile platforms / operating systems: IOS, Android, Windows? One / two / many?
 - How many platforms we can afford to support and develop?
 - Should you develop native mobile apps vs mobile websites (mobile optimises) or both?
 - Ed, Where does the responsive web fit into plans? (Responsive web is where you web service adapts automatically based on screen size being used)
 - Developing apps – do "just enough" or "build a Rolls Royce"?
 - Mobile in the morning, desktop during the day and tablet in the evening? What is the role of tablets in your mobile / classified strategy? Should they have a special role?
 - Ed , you are working with mobile first classified services, Needz. What is your advice?
 - Organisational issue: should be separate mobile development and team from existing operations?

Questions

- Monetisation
 - Print dollars, digital cents and mobileHow classifieds companies can make money in mobile? Are mobile revenues complementary or substitutes? Banners are not the best way to monetise mobile – how to compensate the "lost banner revenues"?
 - Is payment an obstacle in mobile? Willingnes to pay? Methods of payment?
 - Armin how you intend to monetize your service?
- Competition
 - Many of the new players (e.g Trulia in real estate) in mobile classifieds market are not from the industry. Why? What should we do?
 - Are "mobile only" classfieds a threat or a niche?
 - Ed , you are working with mobile first classified services and represent competi is your advice?
 - Armin, you are coming outside the classifieds industry....
- Future
 - What is your estimate on how fast 50% of the traffic comes from mobile devices in your own country? So how much time we have left to fix our mobile strategies?
 - Google, Facebook, Amazon – who will dominate in the mobile?