



# Mobile: A Catalyst For Digital Transformation

Tony Markovski, Head of Mobile EMEA

 @tonymarkovski



INDEX  
INDEX  
20.1%  
+37<sup>51</sup>  
-26<sup>10</sup>

19.2%  
73<sup>5</sup>  
+17<sup>22</sup>

INDEX  
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48.1%  
84<sup>97</sup>  
84<sup>20</sup>

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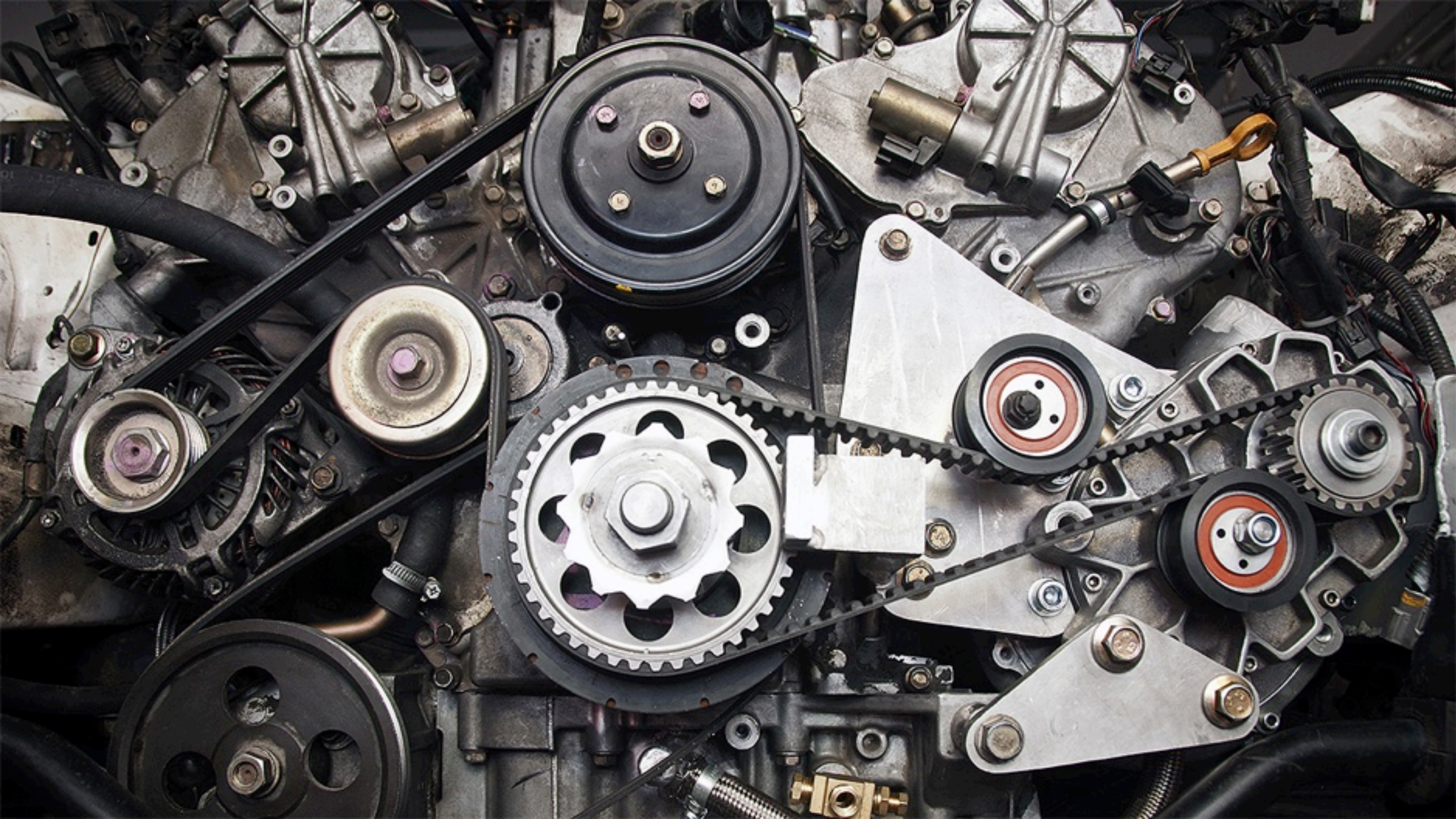
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-11<sup>11</sup>  
-15<sup>15</sup>

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-97<sup>97</sup>  
-7<sup>7</sup>

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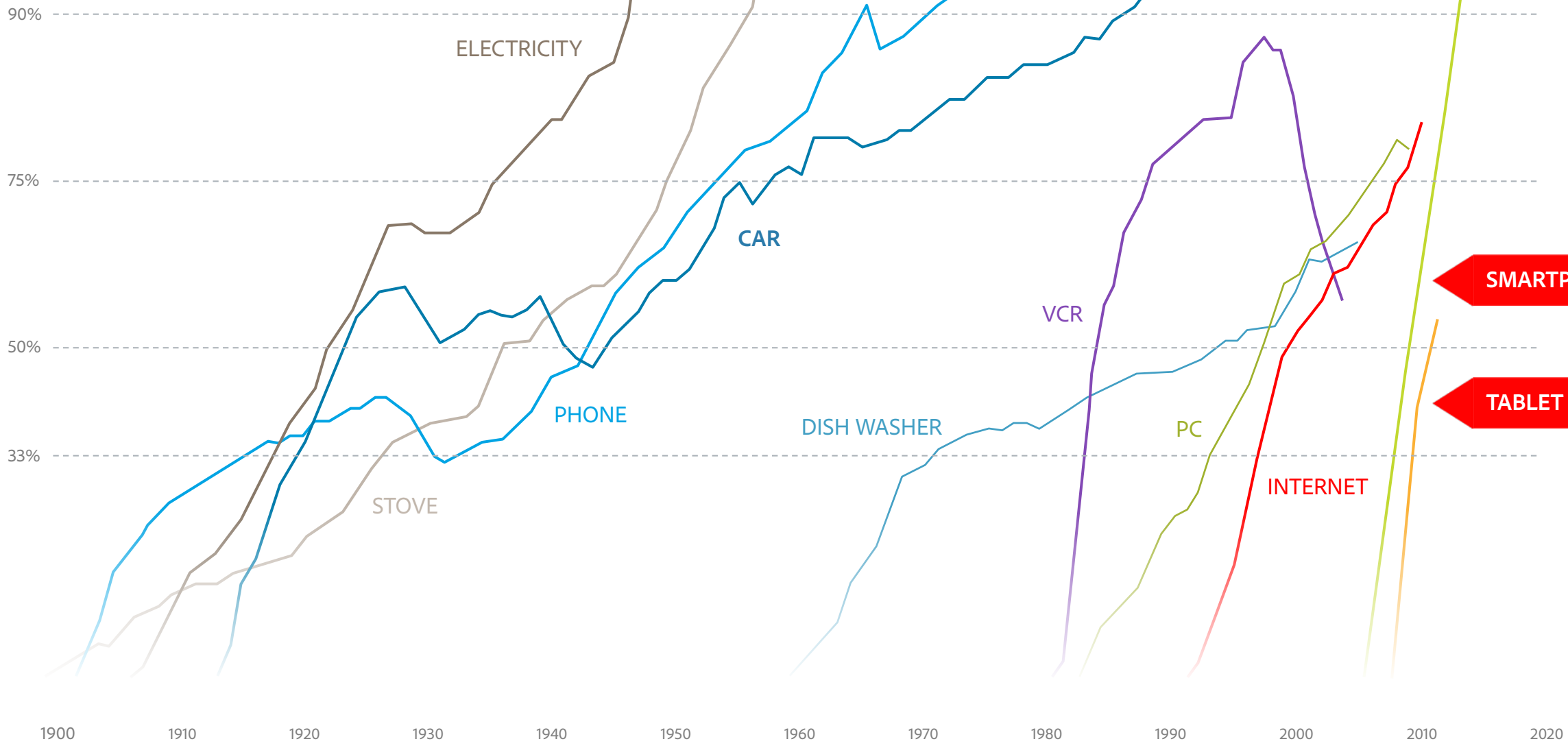






What Is The Future  
Of (Digital) Business?

Designing organisations



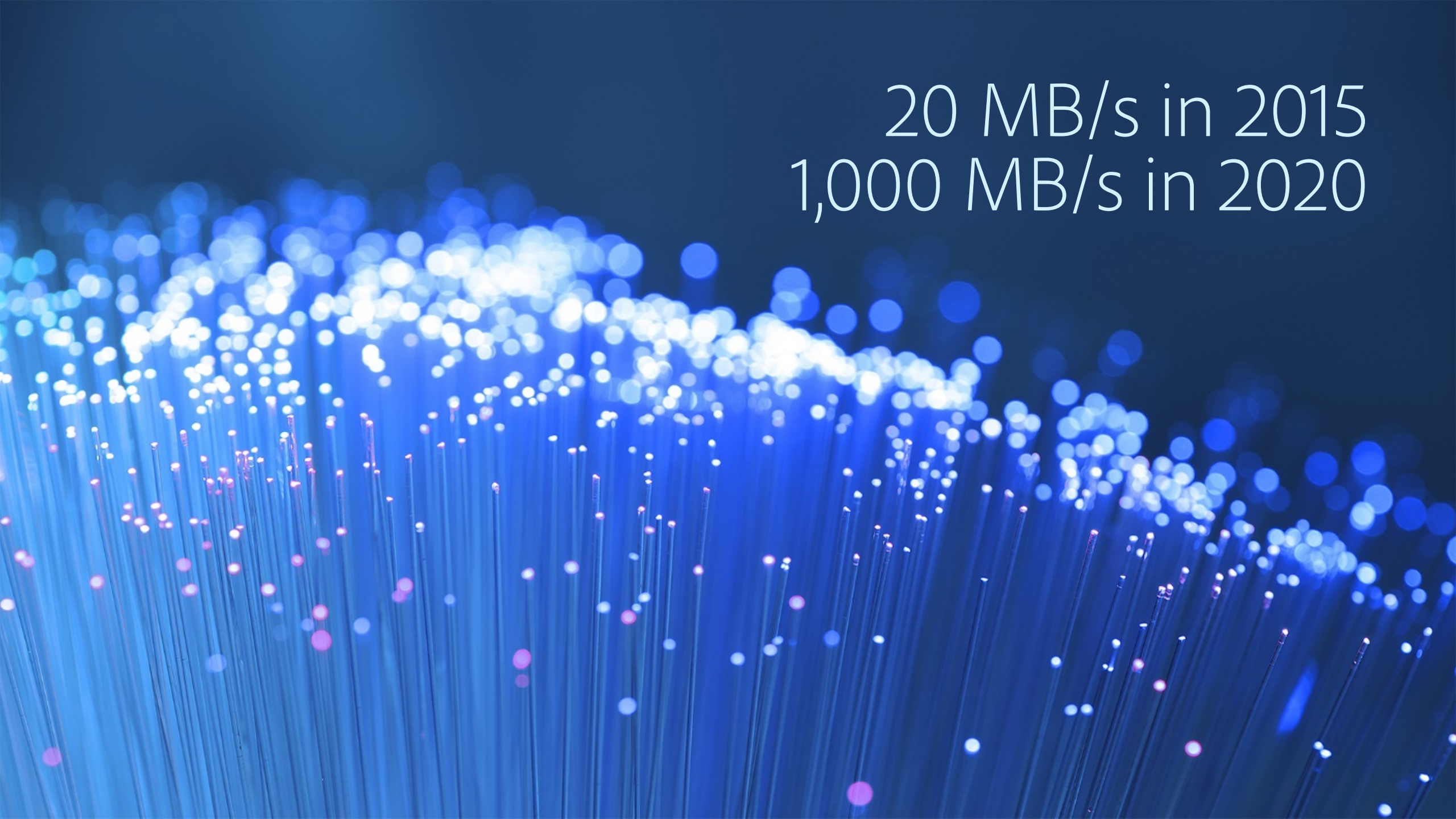


1995

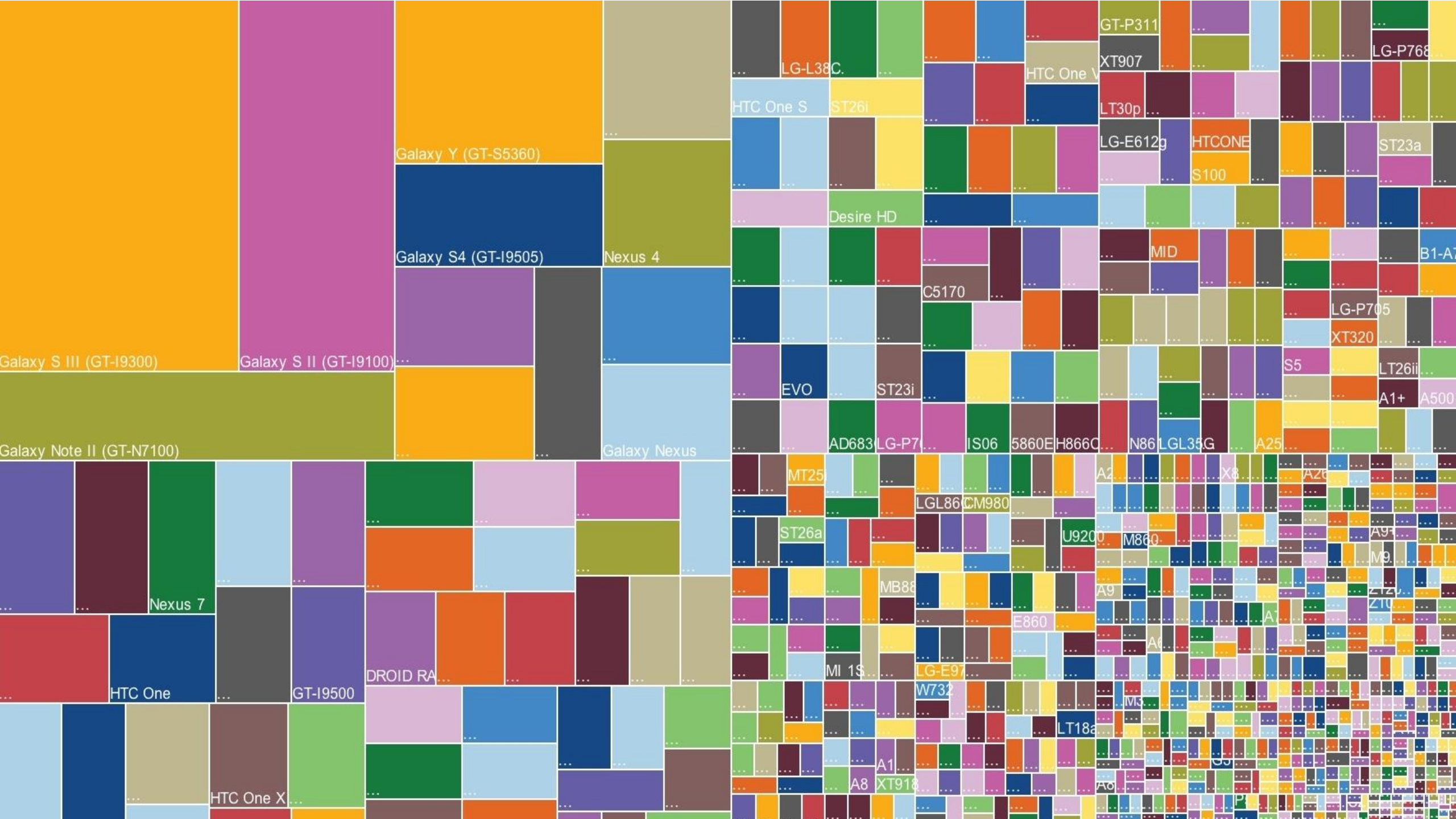


2015





20 MB/s in 2015  
1,000 MB/s in 2020



# Meet Generation C

**Denis** | Gym Instructor


★★★★★  
Lululemon Athletica is fantastic.

**Tillmann Pape** | Munich


Checks in at Lufthansa while in Über taxi

 **Vodafone 4G**  
Samsung Galaxy Note 5


 **Elliott S.**

 Paolo Motta, Italy

 Marta D.

 T-Mobile  
Nokia Lumia 520

Age 40

 Thomas Balduff

**Andreas H** | Married

Bought a new house


 **TeliaSonera**  
Iphone 6 Plus

amazon.com

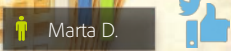
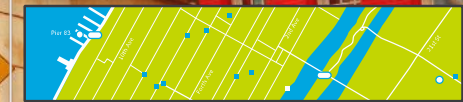


@AdobeMktgCloud

3,343, 4,453

 **Rob Cullen**

Age 43



# Meet Generation C

**60% of digital media** is consumed on smartphones and tablets

(50% higher than last year)

comScore, The US Mobile App Report, August 2014

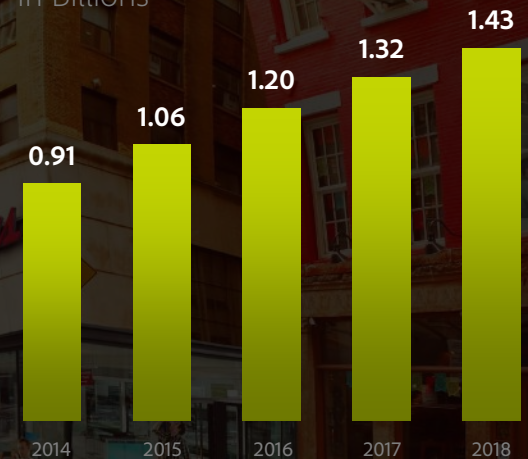
**310 billion apps** downloaded by end of 2015

Market Trends: Mobile App Stores, Worldwide, 2012

**2,500,000,000** smartphones by end of 2016

eMarketer, December 2013

**Tablet Users Worldwide 2014-2018**  
In Billions



eMarketer, December 2014

# Meet Generation C

**Average Time Spent per Day with Major Media by US Adults, 2011-2015**  
hrs:mins and CAGR

	2011	2012	2013	2014	2015	CAGR (2011-2015)
<b>Digital</b>	<b>3:40</b>	<b>4:20</b>	<b>4:51</b>	<b>5:15</b>	<b>5:38</b>	<b>11.4%</b>
—Desktop/laptop*	2:33	2:27	2:19	2:22	2:22	-1.8%
—Mobile (nonvoice)	0:48	1:35	2:16	2:34	2:51	37.2%
—Other connected devices	0:18	0:18	0:17	0:19	0:25	7.8%
<b>TV**</b>	<b>4:34</b>	<b>4:38</b>	<b>4:31</b>	<b>4:22</b>	<b>4:15</b>	<b>-1.8%</b>
<b>Radio**</b>	<b>1:34</b>	<b>1:32</b>	<b>1:30</b>	<b>1:28</b>	<b>1:27</b>	<b>-2.0%</b>
<b>Print**</b>	<b>0:44</b>	<b>0:38</b>	<b>0:32</b>	<b>0:26</b>	<b>0:21</b>	<b>-17.0%</b>
—Magazines	0:18	0:16	0:14	0:12	0:10	-13.5%
—Newspapers	0:26	0:22	0:18	0:14	0:11	-19.8%
<b>Other**</b>	<b>0:39</b>	<b>0:38</b>	<b>0:31</b>	<b>0:26</b>	<b>0:24</b>	<b>-11.7%</b>
<b>Total</b>	<b>11:11</b>	<b>11:46</b>	<b>11:55</b>	<b>11:57</b>	<b>12:04</b>	<b>1.9%</b>

Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; \*\*includes all internet activities on desktop and laptop computers; \*\*excludes digital  
Source: eMarketer, April 2015

188127

www.eMarketer.com

**Average Time Spent per Day with Major Media by UK Adults, 2011-2015**  
hrs:mins

	2011	2012	2013	2014	2015
<b>Digital</b>	<b>2:25</b>	<b>2:55</b>	<b>3:29</b>	<b>4:09</b>	<b>4:39</b>
Desktop/laptop*	1:55	2:02	2:07	2:10	2:13
Mobile (nonvoice)	0:31	0:53	1:22	1:59	2:26
—Smartphone	0:22	0:36	0:55	1:14	1:31
—Tablet	0:03	0:10	0:21	0:37	0:48
—Feature phone	0:06	0:06	0:07	0:07	0:07
<b>TV**</b>	<b>3:19</b>	<b>3:17</b>	<b>3:15</b>	<b>3:14</b>	<b>3:12</b>
<b>Radio**</b>	<b>1:31</b>	<b>1:29</b>	<b>1:26</b>	<b>1:24</b>	<b>1:23</b>
<b>Print**</b>	<b>0:23</b>	<b>0:22</b>	<b>0:21</b>	<b>0:20</b>	<b>0:19</b>
<b>Total</b>	<b>7:38</b>	<b>8:02</b>	<b>8:31</b>	<b>9:07</b>	<b>9:34</b>

Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; numbers may not add up to total due to rounding; \*includes all internet activities on desktop and laptop computers; \*\*excludes digital  
Source: eMarketer, April 2015

Source: eMarketer, April 2015

187329

www.eMarketer.com

**Average Time Spent per Day with Major Media by US Adults, 2013-2015**  
hrs:mins and CAGR

	2013	2014	2015	CAGR (2011-2015)
<b>Digital</b>	<b>2:34</b>	<b>2:53</b>	<b>3:05</b>	<b>15.3%</b>
Desktop/laptop*	1:03	1:04	1:04	1.3%
Mobile (nonvoice)	1:31	1:50	2:01	27.5%
—Smartphone	0:55	1:07	1:15	36.0%
—Tablet	0:22	0:30	0:35	62.7%
—Feature phone	0:14	0:13	0:12	-11.8%
<b>TV**</b>	<b>2:42</b>	<b>2:41</b>	<b>2:40</b>	<b>-0.8%</b>
<b>Radio**</b>	<b>0:11</b>	<b>0:11</b>	<b>0:11</b>	<b>0.8%</b>
<b>Print**</b>	<b>0:12</b>	<b>0:11</b>	<b>0:11</b>	<b>-7.4%</b>
—Magazines	0:11	0:10	0:10	-5.1%
—Newspapers	0:01	0:01	0:01	-7.4%
<b>Total</b>	<b>5:39</b>	<b>5:57</b>	<b>6:08</b>	<b>5.4%</b>

Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; numbers may not add up to total due to rounding; \*includes all internet activities on desktop and laptop computers; \*\*excludes digital  
Source: eMarketer, April 2015

www.eMarketer.com

Skate to where the puck is going to be,  
not where it has been.

Wayne Gretzky

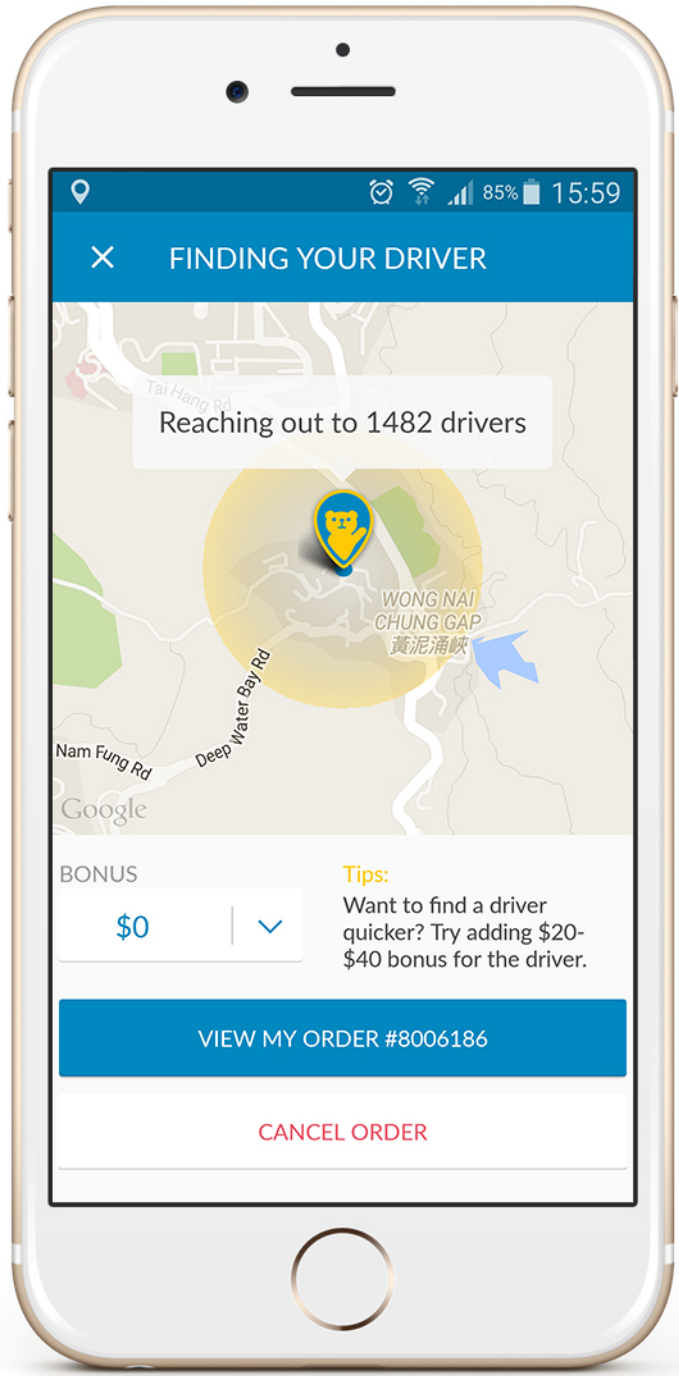




GOGO  
**VAN**  
MOVE IT!

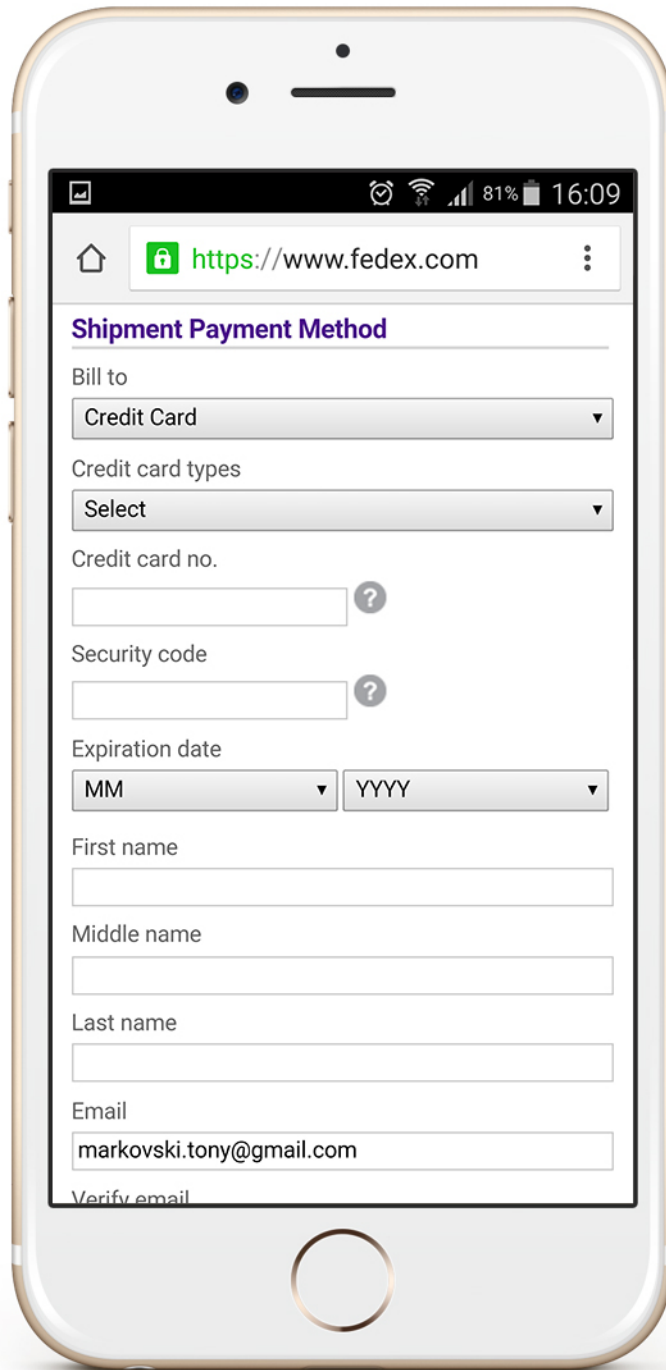
MOVE YOUR STUFF  
WITH ONLY ONE HAND











16:09 81% [Signal] [Wi-Fi] [Alarm]

https://www.fedex.com

### Shipment Payment Method

Bill to

Credit Card

Credit card types

Select

Credit card no.

Security code

Expiration date

MM YYYY

First name

Middle name

Last name

Email

markovski.tony@gmail.com

Verify email

TRANSFIX

ROADIE

PARCEL /// PENDING THE PACKAGE MANAGEMENT SOLUTION

Doorman

shyp

shipster

ShipBob

shippo

**Package, Envelope, or Express Freight**  
FedEx Express or FedEx Ground

- Create Shipment
- Get Rates & Transit Times
- Find FedEx Locations
- Schedule and Manage Pickups
- Order Shipping Supplies
- Pack Shipment
- Access International Services

**Freight Shipments**  
FedEx Freight

- Generate Bill of Lading
- Get Rates and Transit Times
- Schedule and Manage Pickups
- View Transit Maps
- Find FedEx Locations
- Go to Shipping Desk
- International Services
- U.S. Offshore Services

**Expedited/Extra-care Handling**  
FedEx Custom Critical

- Ship
- Fast Ship
- Get Rates & Transit Times
- Temperature Control
- Secure Services
- Truckload Solutions

**Air/Ocean Freight Forwarding**  
FedEx Trade Networks

- Get Forms
- My Forms
- Importer Security Filing
- eManifest

Not sure which service is right for you? Click Here

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cargomatic

pivot FREIGHT

AEROPOST

Kanga

UBER

MATTERNET

GOGOVAN

Shipwire

FLEXPOR

shipstr

E

DROPSHIP COMMERCE

POSTMATES

schlep

zipments

buddytruk



## You Don't Need A Digital Strategy, You Need A Digitally Transformed Company

Posted Apr 18, 2015 by Tom Goodwin (@tomfgoodwin)

9,918 SHARES



**Editor's note:** Tom Goodwin is senior vice president of strategy and innovation at Havas Media.

In 2015 it seems foolish to have a digital or mobile strategy, you just need a business strategy for the modern world. Whether it's Uber reinventing the transportation business, Instagram changing the nature of photography or Netflix disrupting video content, what binds these companies is they brought digital thinking to the very heart of their companies, not just bolted it onto the side.

From Tesla to Instacart, Hotel Tonight to Twitter, BuzzFeed to WhatsApp, every high-growth, high-profit, high-value unicorn was constructed with one thing in mind: the modern world.

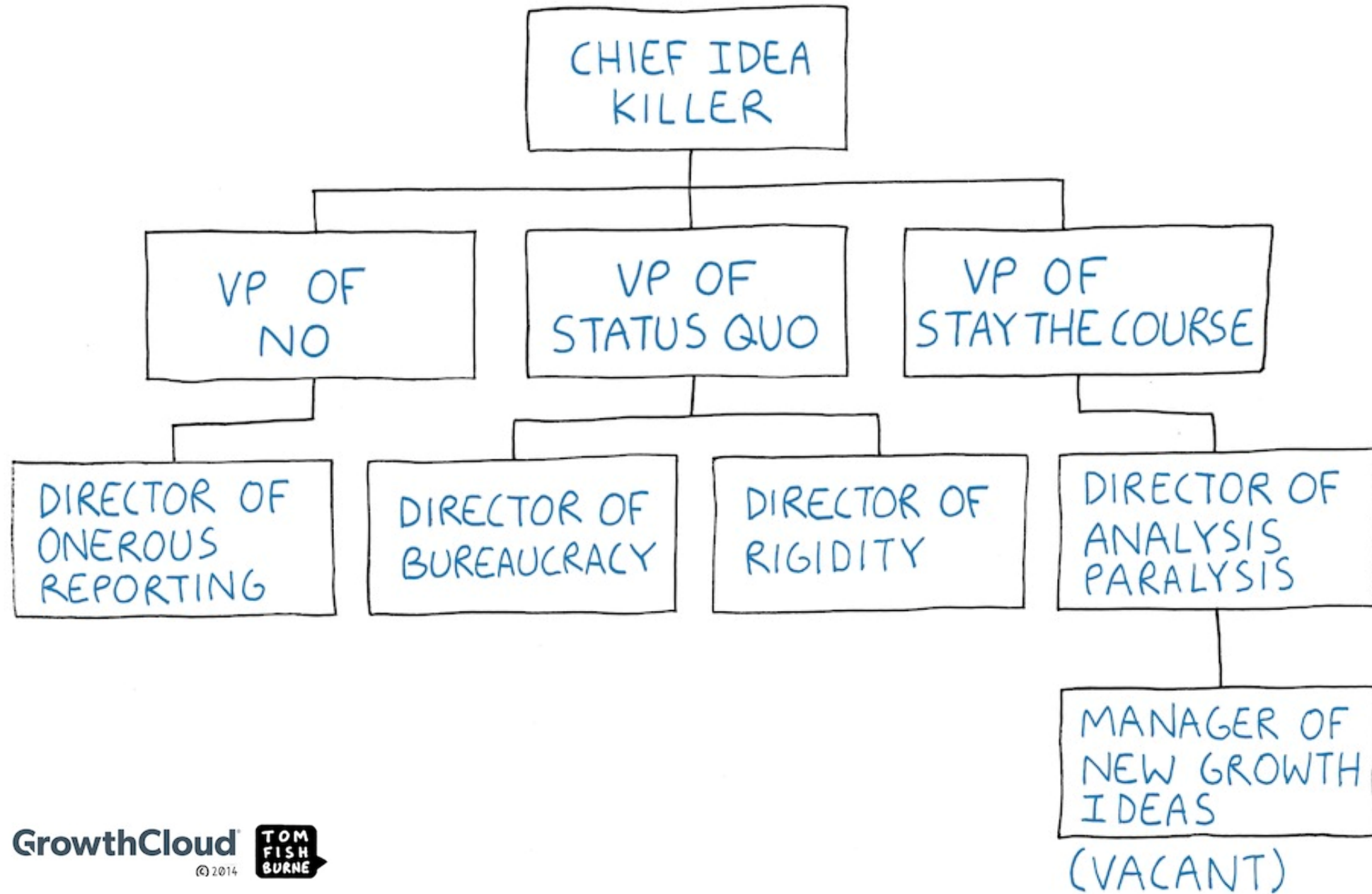
These are companies founded in a world of new behaviors, inspired by new technology and liberated by new market dynamics. They have ignored all existing companies in their marketplace, they've been propelled into rapid growth unencumbered by the same elements, assets, knowledge, learned behavior that once fueled the incumbents.

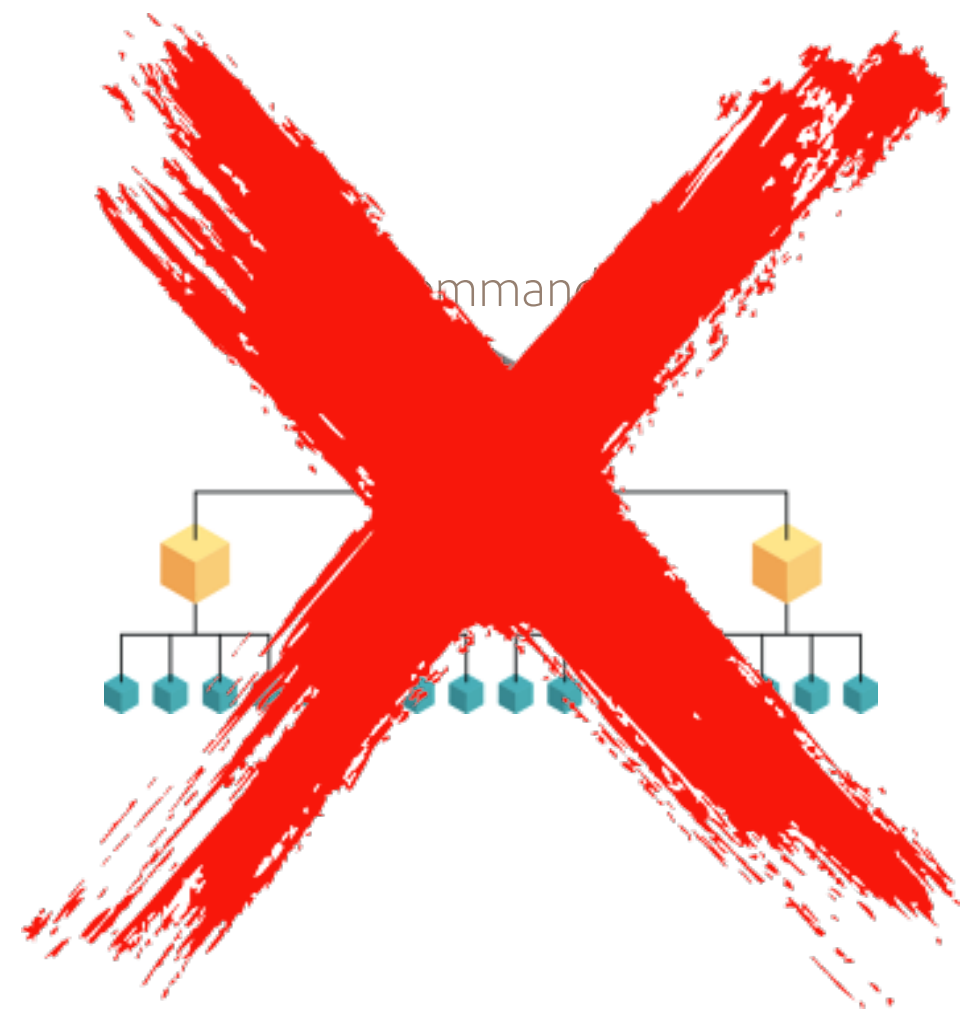
knowledge, learned behavior that once fueled the incumbents.

*These are companies founded in a world of new behaviors, inspired by new technology and liberated by new market dynamics.*

*They have ignored all existing companies in their marketplace, they've been propelled into rapid growth unencumbered by the same elements, assets, knowledge, learned behavior that once fueled the incumbents.*

**Tom Goodwin** Senior Vice President of Strategy & Innovation, Havas Media



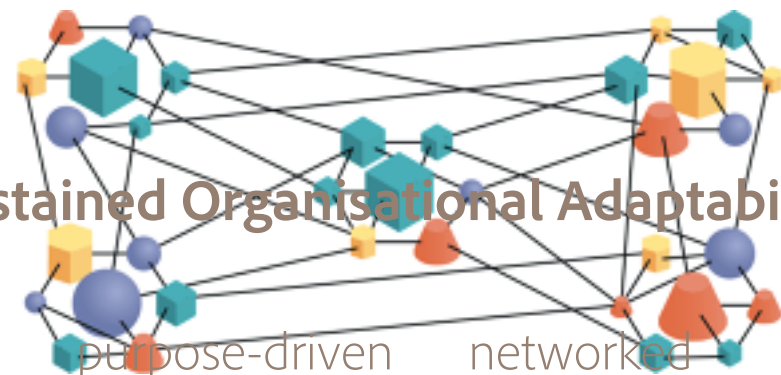


Command

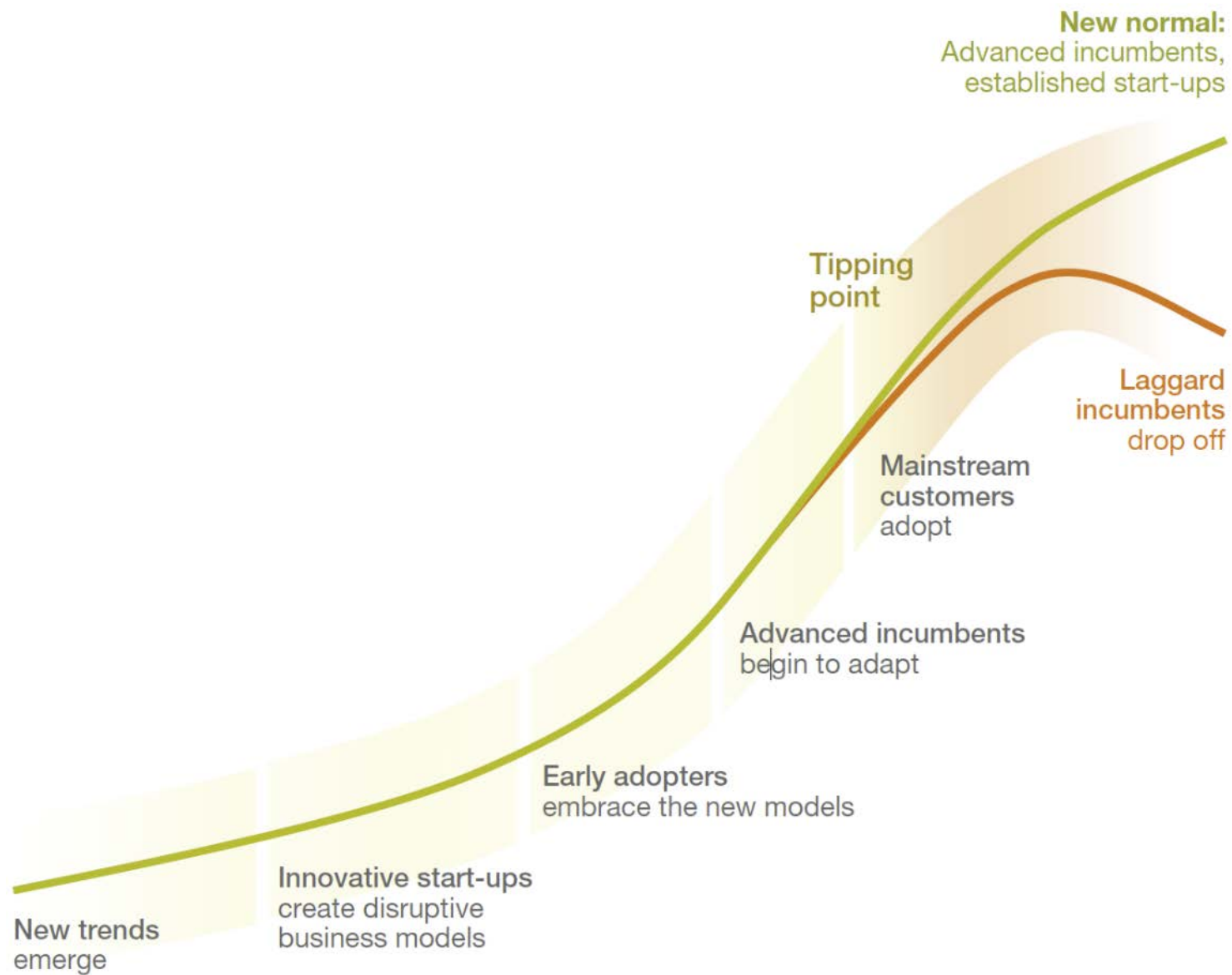


Team of Teams

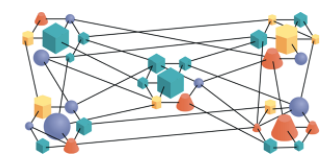
## Sustained Organisational Adaptability



purpose-driven networked  
 collaborative non-hierarchical diverse  
 fearless unconventional inclusive  
 innovative empathic autonomous  
 transparent trusting creative  
 responsive real-time

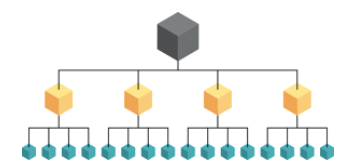


Digital Masters



Fashionistas  
Conservatives

Beginners





SUCCEED IN THE DIGITAL ECONOMY

# BUSINESS STRATEGY

MOBILE IS THE #1 CATALYST FOR DIGITAL TRANSFORMATION

ENGAGING MOBILE EXPERIENCES

CREATE

MANAGE

OPTIMISE

MONETISE



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