The New Mobile Landscape
Stanford POMI 2009
The Rise of the Smartphone

Phone to become most ubiquitous connected computer

Source: Deutsche Bank 2009
2009: Smartphones 2.0

Apple iPhone
Google Android
LG Voyager
Samsung Omnia
Apple App Store
Android Marketplace
Samsung App Store
Palm Pre
Blackberry Storm
Blackberry App Storefront
Windows Mobile App Store
Palm App Store
LG Voyager
Samsung Omnia
Pervasive Wireless Networks
Driving New Device Innovation
Wireless Data Revenue Becoming Significant ...

Source: CTIA, Datamonitor
... While Still Growing Faster Than Any Other Service

U.S. Wireless Carrier Revenue Growth ('07-'08)

- Data ARPU: 26%
- Voice ARPU: -9%

Source: Multimedia Intelligence, Nielsen, analyst estimates
Open Platforms = Open Innovation

- VoIP moves to mobile
- Picoprojectors & desktop UIs
- Speech recognition 2.0
- Digital virtual goods
3G Growth vs. 2G

SOURCE: VERIZON PRESENTATION BY CTO DICK LYNCH

Wireless Data Trends

Terabytes

4,000

3,000

2,000

1,000

0

2004

2008

3G

2G
LTE Expected to be Even More Dramatic

SOURCE: VERIZON PRESENTATION BY CTO DICK LYNCH

LTE Expectations

Terabytes
4,000,000
3,000,000
2,000,000
1,000,000

Dick’s Projection

LTE

3G

2010
2014
Industry Challenges Persist ...

- Device fragmentation
- Complex ecosystem
- Application discovery and payments
- Overloading of 3/3.5G networks and backhaul

... but also create opportunities
# Opportunities in Mobile

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