

We have an app for that

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The new driver of user experience

A wide range of specific applications drives the usage of connected devices

"Hardware/software" world



- Packaged software
- Few complex softwares for multiple tasks
- "Killer application" sells the hardware

"Connected devices" world



- Marketplace and connected ecosystem
- Specific apps for specific tasks
- Cloud services and wide range of apps sell the service



Experience roaming across screens

Users use multiple screens, often simultaneously



- Complementary usage of screens
- Content roaming
- Application roaming
- Cloud service roaming
- Identity roaming
- Experience roaming across screens



Experience roaming across screens

Users use multiple screens, often simultaneously



560.000

Multiscreen users in Hungary*
18-59, Szonda-Ipsos 2011

84%

Of TV-watcher multiscreen users
browse the web during TV watching

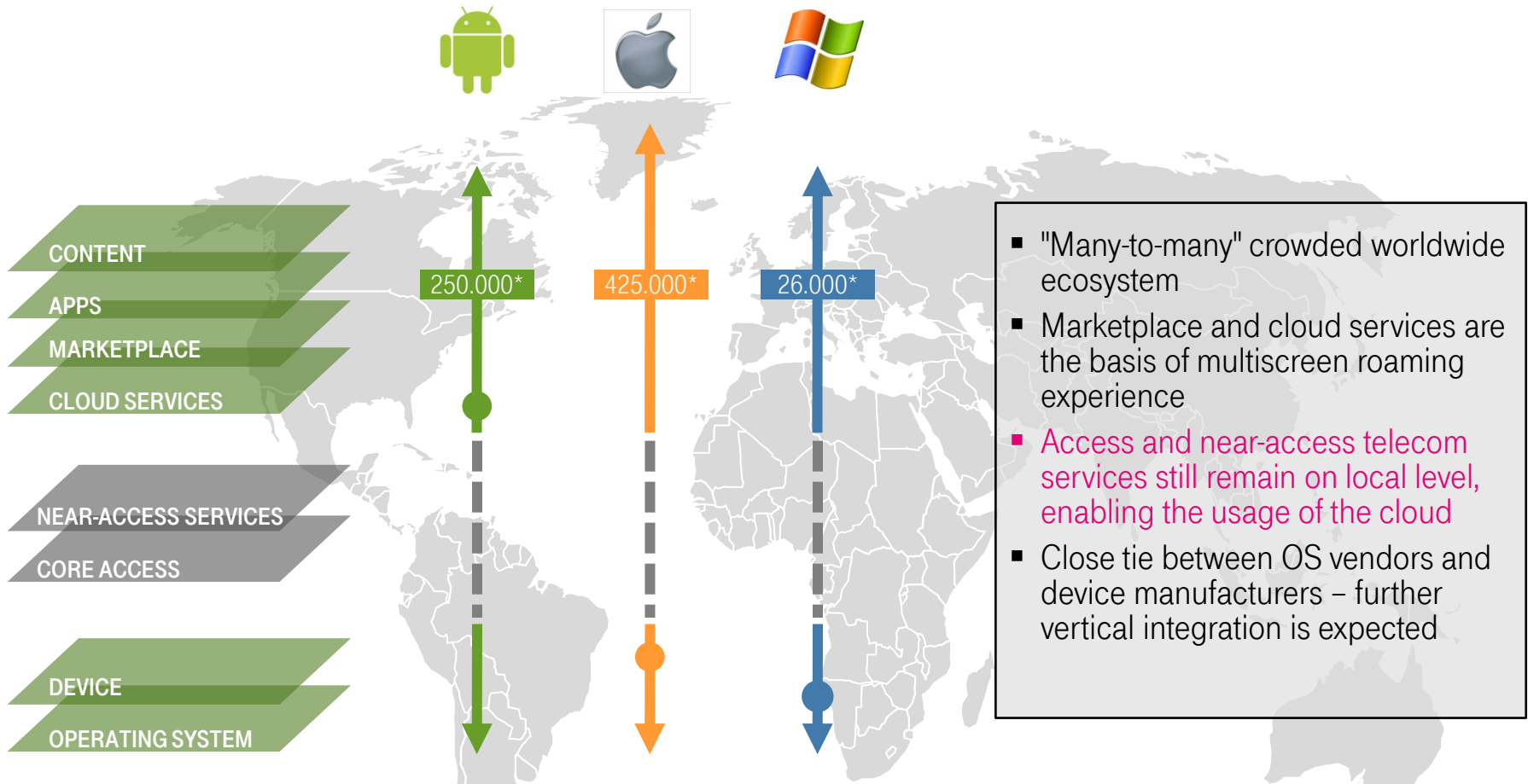
70%

Of smartphone owners use their
smartphone during TV watching



Based on Sonda Ipsos 2011 Multiscreen User research.
Multiscreen user = 18-59 smartphone AND weekly internet users; Ipsos netpanel CAWI, n=400

Experience roaming is served by vertically integrated global ecosystems

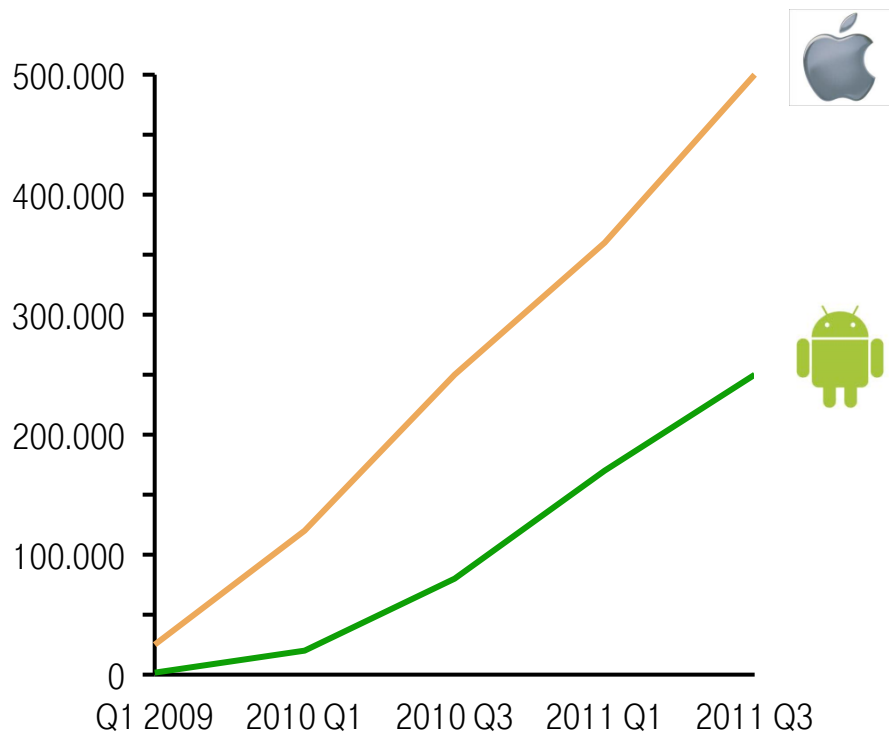


- "Many-to-many" crowded worldwide ecosystem
- Marketplace and cloud services are the basis of multiscreen roaming experience
- Access and near-access telecom services still remain on local level, enabling the usage of the cloud
- Close tie between OS vendors and device manufacturers – further vertical integration is expected

T * Number of currently available applications in the application market, sept/2011

Exponential growth of application range

The number of available apps is growing at an accelerating pace



- Ocean of applications
- Difficult to get known
- Similar problems and solutions as those of the world wide web
- Space for sub- and local ecosystems

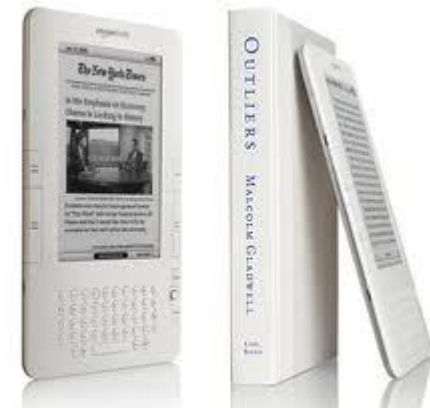
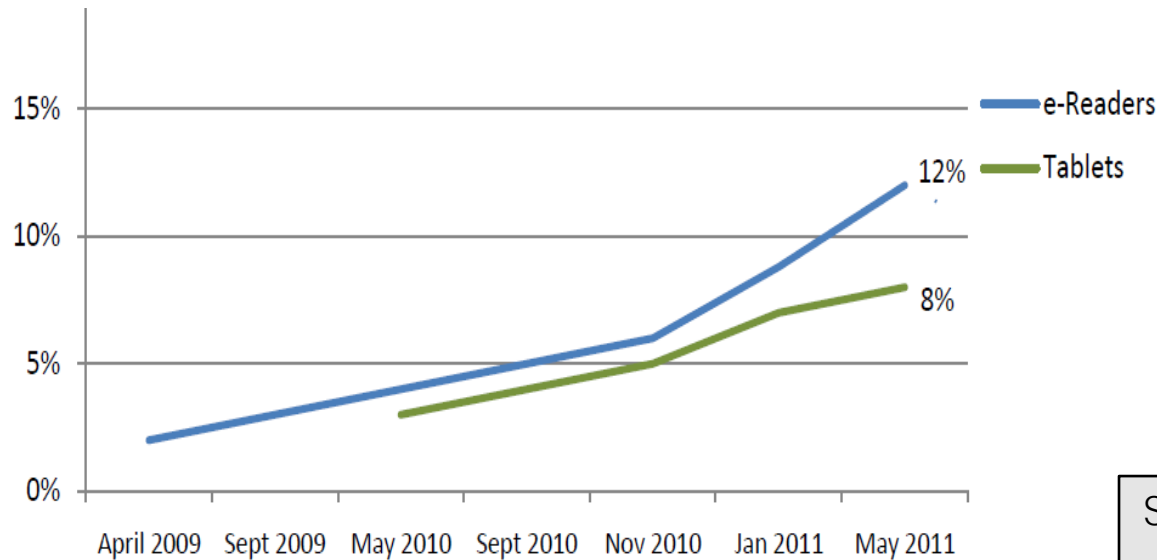


*Source: Wikipedia

The lesson of Amazon's Kindle

Established ecosystem with a wide range of apps and/or content are the critical success factors

Growth in e-Reader and Tablet ownership among US adults*

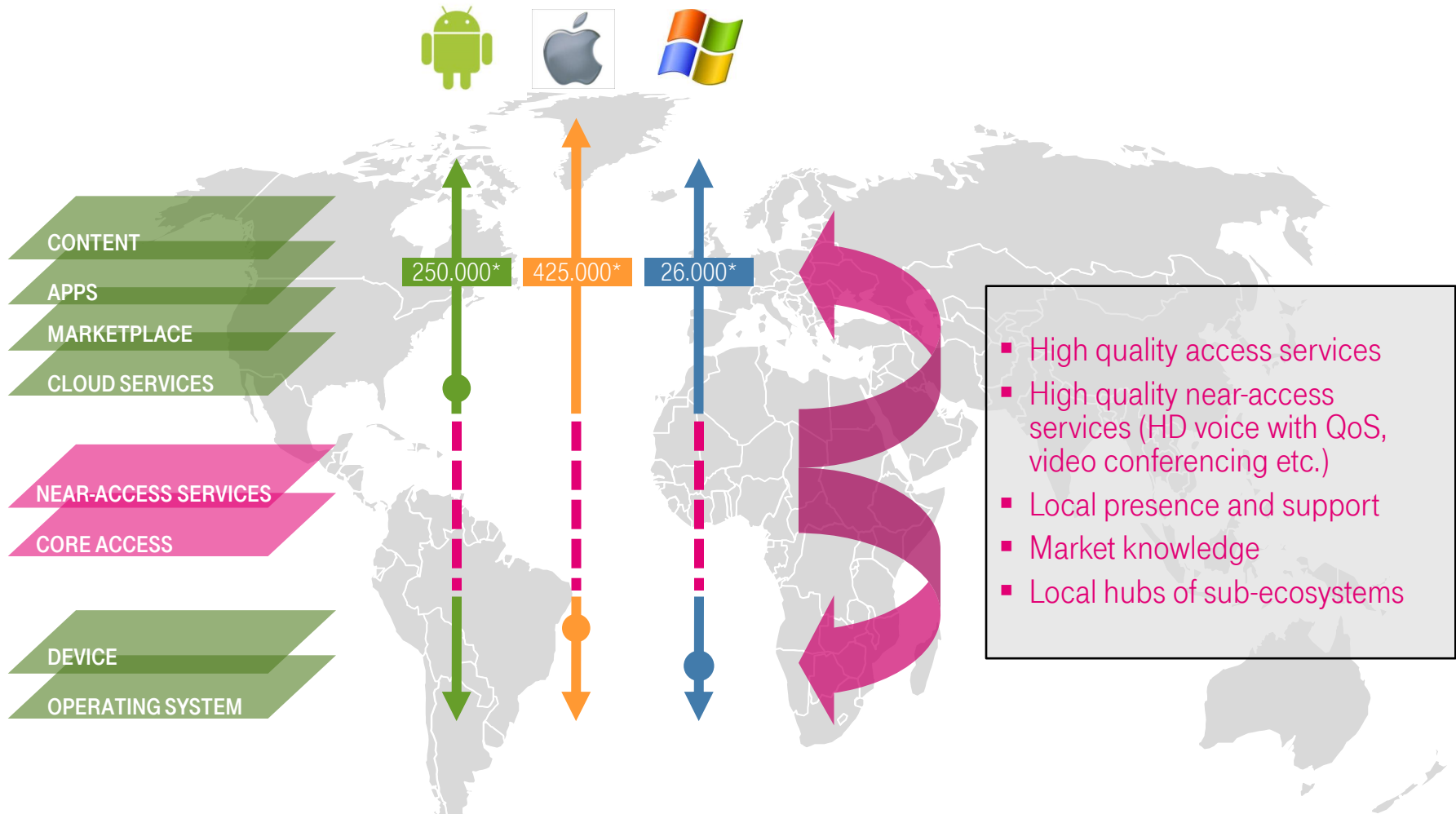


Success lies in building and promoting a healthy content/service ecosystem, taking into account the characteristics of local markets.

T *Source: Pew Internet and American Life project 2011

Maneuvering space of local telecom players

Carriers have to learn, how to add more value in the new value chain

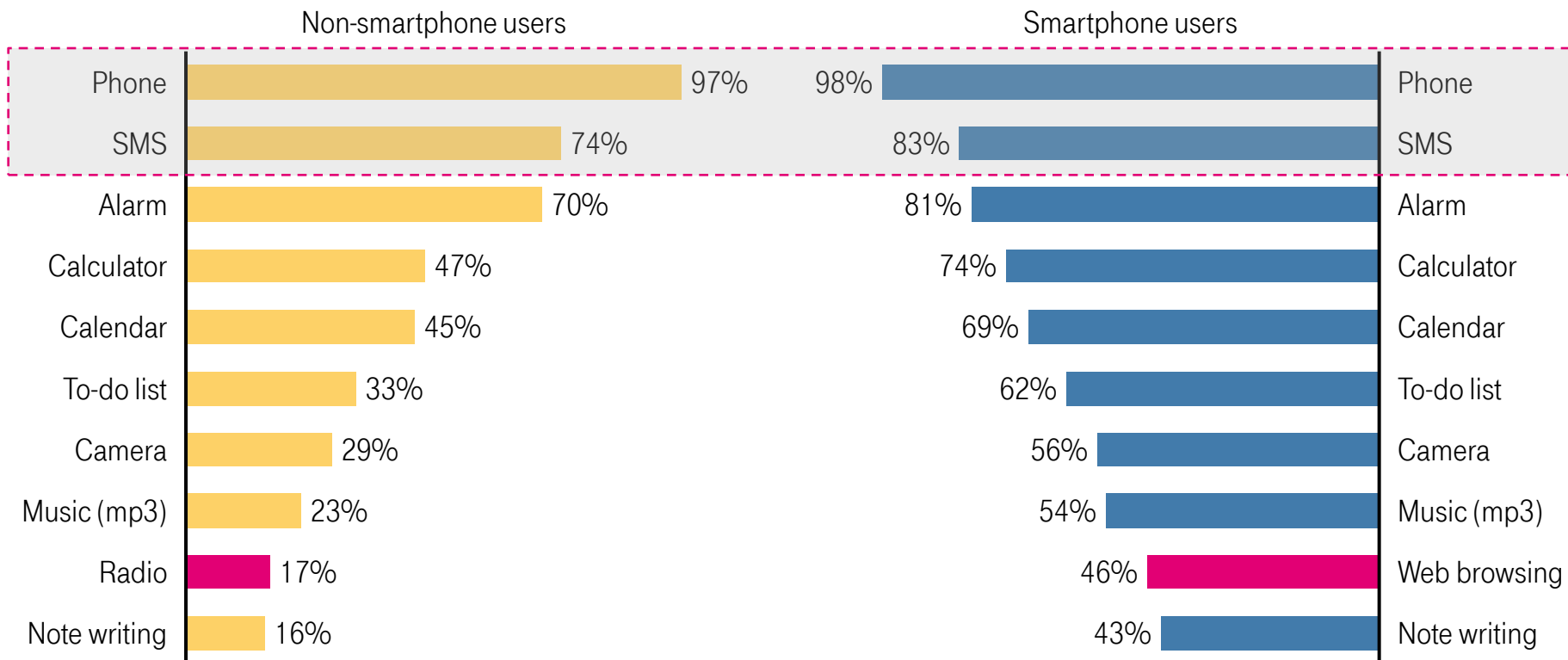


T * Number of available applications in the application market, sept/2011

The second golden age of telecom services

Traditional telco services are used even more intensively by smartphone users

Most used functions among traditional and smartphone users*



* Szonda Ipsos Smartphone research, 2011

Telecom players can leverage the advantages of the app world

... they just have to learn how to use it.



985.000

No. of smartphone owners
in Hungary*

907

"Hungarian" applications
in official Android appstore

23

No. of applications created by
mobile operators in Hungary

16

Number of average applications
installed by Hungarian smartphone
owners*



* Szonda-Ipsos 2010 Nagy Internet kutatás

**Based on Szonda Ipsos 2011 Multiscreen User research.

Cooperation on local level

Telecom and content players can leverage new ecosystem on local level

