

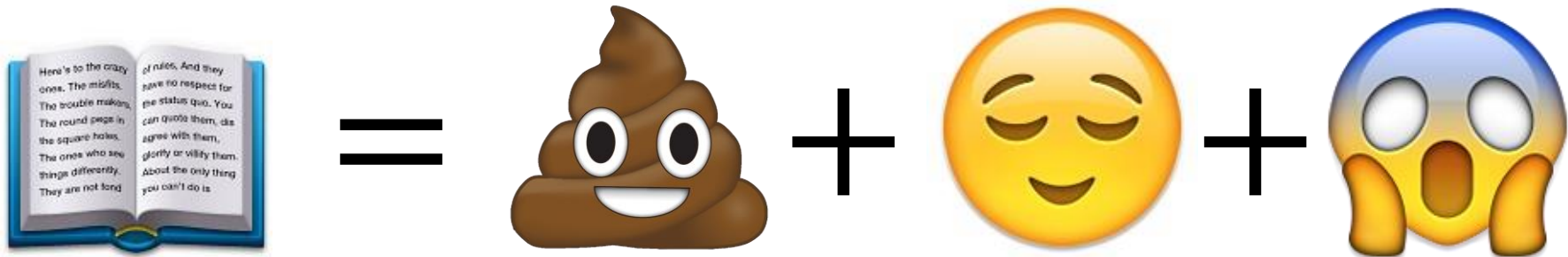


# FORECASTING THE MEDIA FUTURE



**Guy Abrahams**

Global Strategic Planning Director



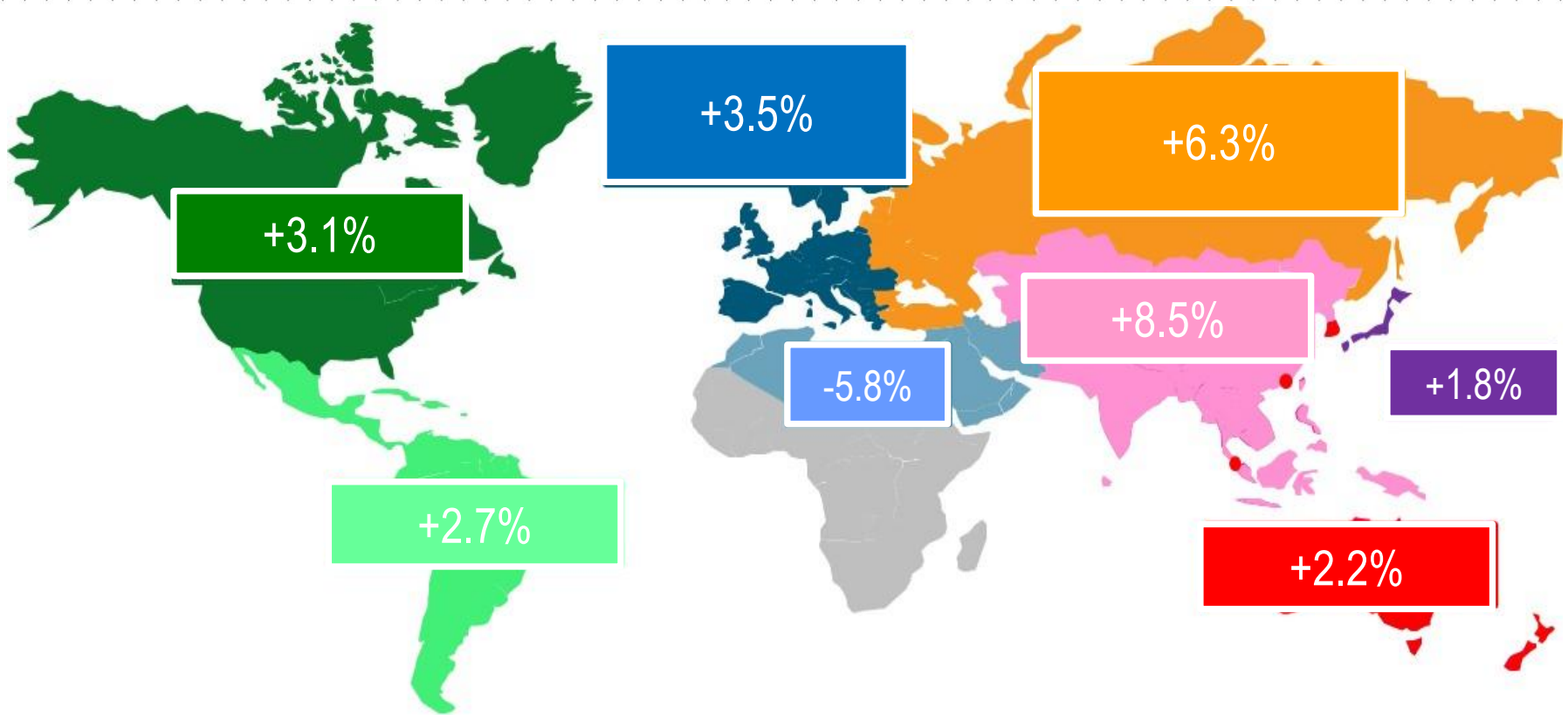


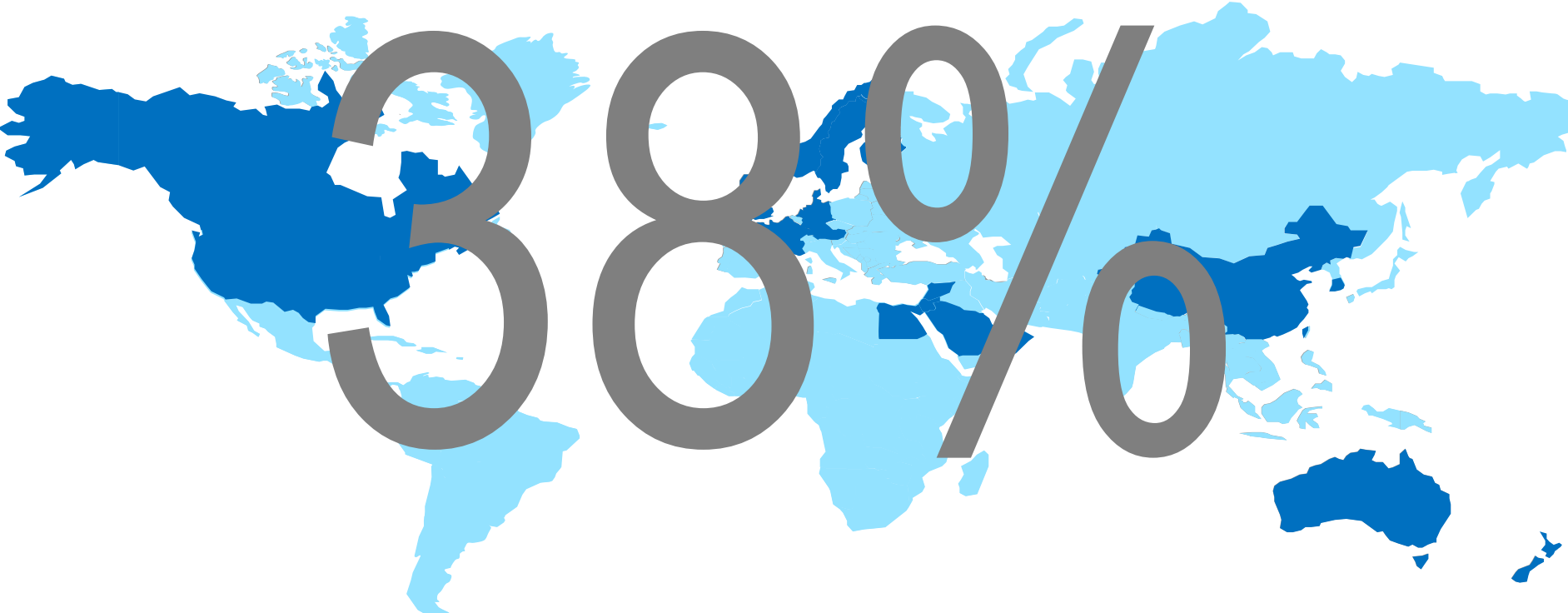
BREXIT

= -£1bn

CUMULATIVE LOSS IN UK ADSPEND  
BY 2030

# AVERAGE ANNUAL ADSPEND GROWTH 2015-2018





380%

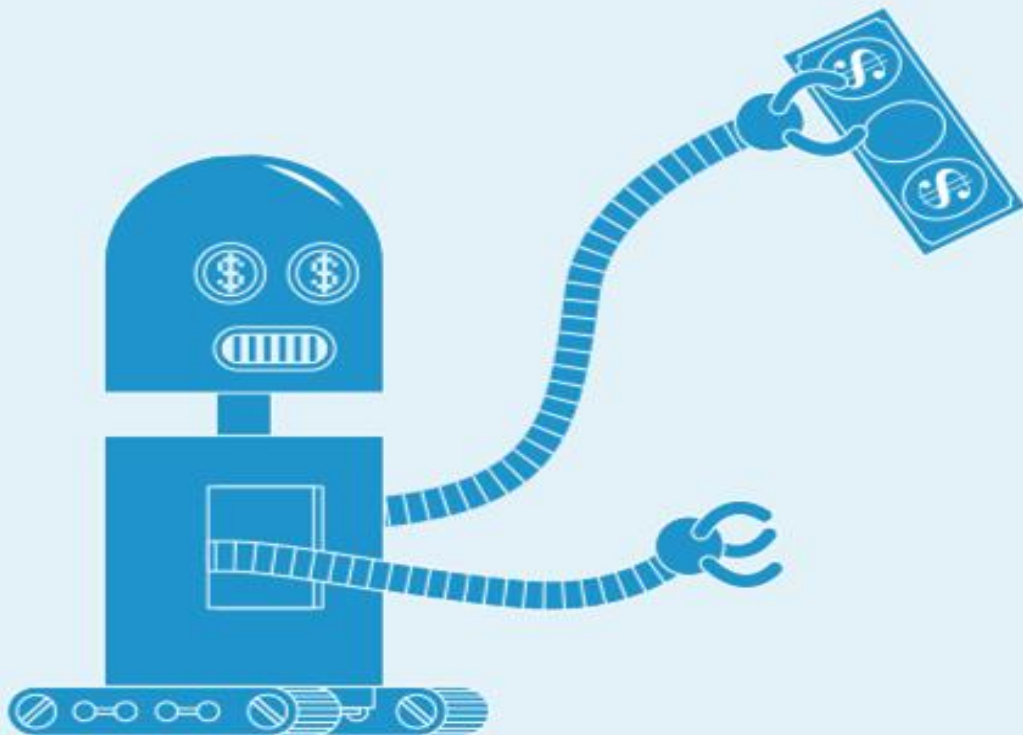
2018

# 49%

OF DIGITAL ADSPEND IN CENTRAL & WESTERN EUROPE IS SEARCH







# +80%

INCREASE IN  
PROGRAMMATIC ADSPEND  
2017 vs 2015 CENTRAL &  
WESTERN EUROPE. %  
DISPLAY 2017 =61.3



An illustration on a teal background showing various mobile app functions. At the top left, a hand holds a smartphone displaying a camera app with a flower icon. To its right, another hand holds a smartphone with a Twitter bird icon. Below the camera app, a hand holds a smartphone with a music note icon. In the center, a hand holds a smartphone with a fork and spoon icon, with a steaming orange mug above it. At the bottom center, a hand holds a smartphone with a shopping cart icon under a red and white striped awning. To the right of the shopping cart, a hand holds a smartphone with a YouTube play button icon. The background also features a faint globe, musical notes, a camera lens icon, a person icon, and a gift box. A white text box on the right contains the main message.

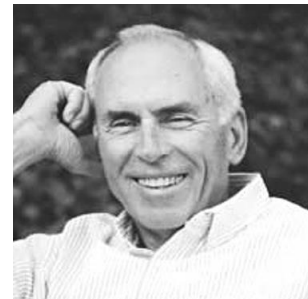
**MOBILE = 87%**  
ADSPEND GROWTH TO  
2018

“

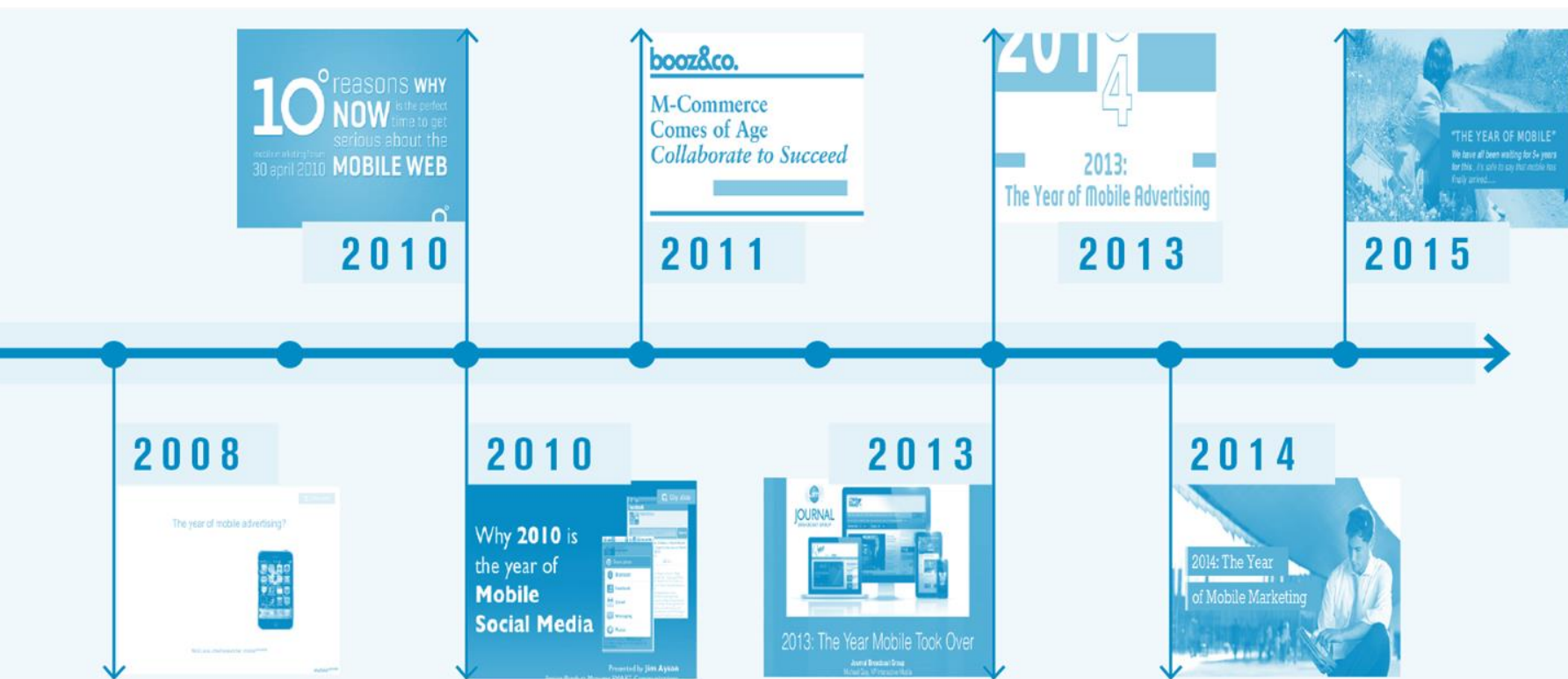
**WE TEND TO OVERESTIMATE  
THE EFFECT OF A  
TECHNOLOGY IN THE SHORT  
RUN AND UNDERESTIMATE THE  
EFFECT IN THE LONG RUN.**

”

BY ROY AMARA, PAST  
PRESIDENT OF THE INSTITUTE  
FOR THE FUTURE



# THE YEAR OF THE MOBILE LASTED A LONG TIME









DATA



ACTIVITY

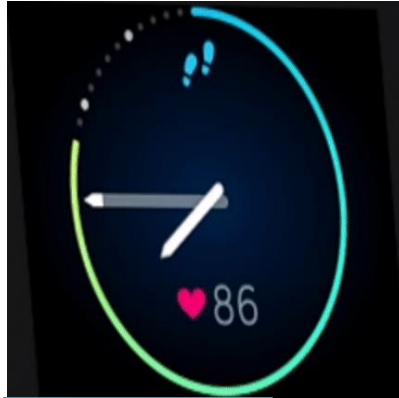


TIME

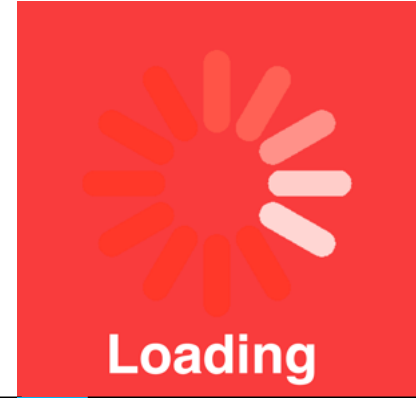
# 3 QUESTIONS TO DETERMINE YOUR MOBILE GENIUS



**3.7 EB**



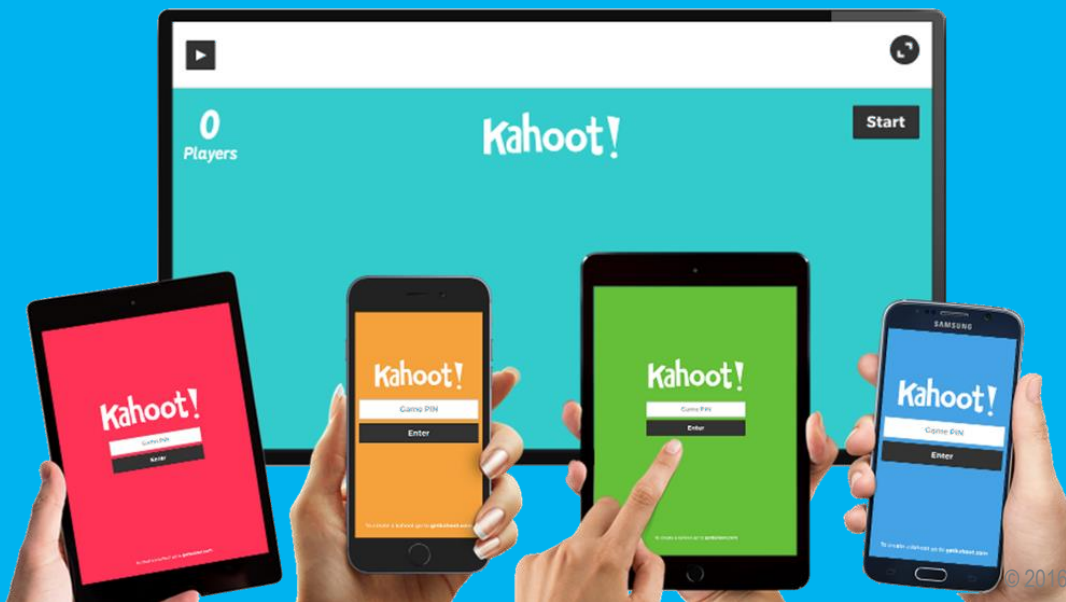
**7.9 B**



**43%**



# GET OUT YOUR PHONES OR TABLET LOG ON TO KAHOOT.IT NOW





**+827%**



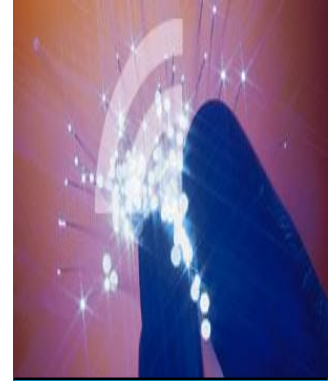
**1.5**



**75%**



**4.4 GB**



**432 m**



DATA



ACTIVITY



TIME

# 50%+ WEBPAGE TRAFFIC FROM PHONE OR TABLET



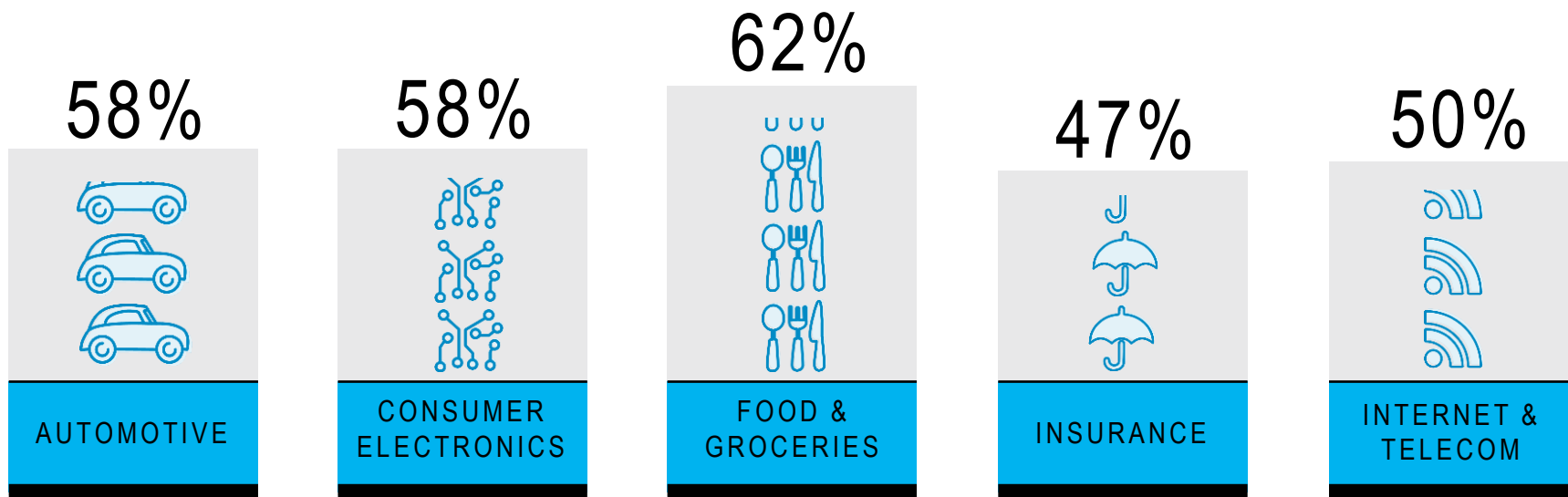
2020

SOURCE: ZENITHOPTIMEDIA / STAT COUNTER GLOBALSTATS FEBRUARY 2016

# SEARCH IS ALREADY MOBILE

% GOOGLE SEARCHES VIA MOBILE

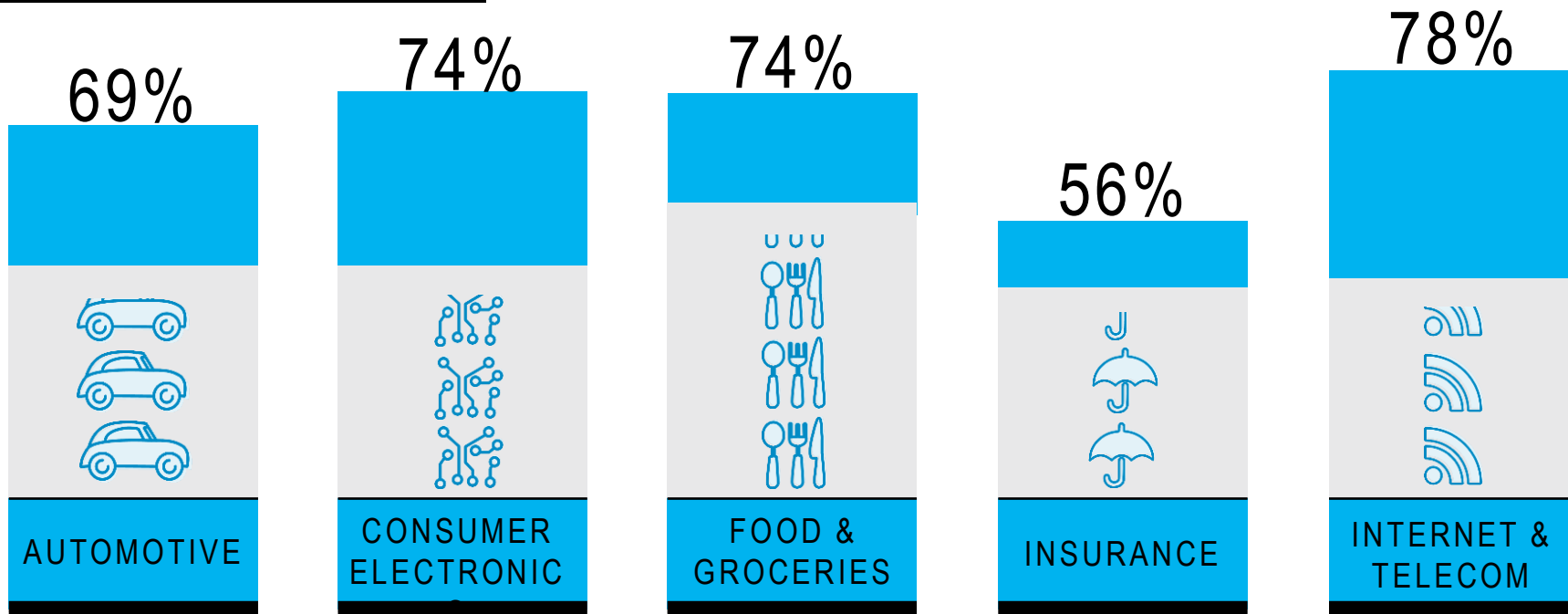
Q4 2015



# SEARCH IS ALREADY MOBILE

% GOOGLE SEARCHES VIA MOBILE

Q4 2018

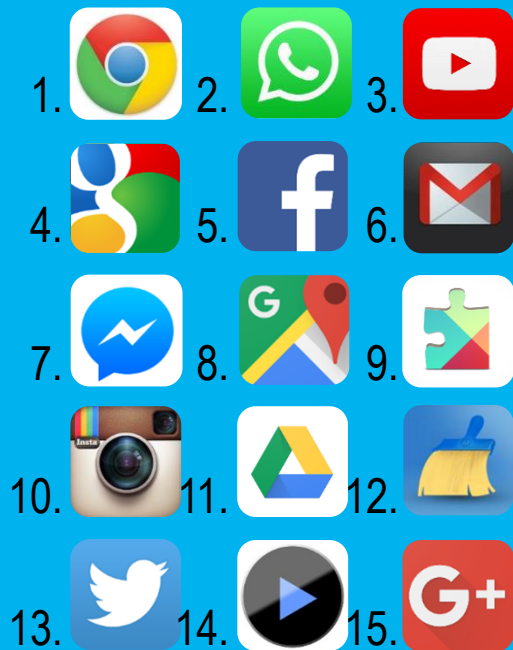


# IT'S ALL ABOUT APPS...

## TOP APPS BY WEEKLY ACTIVE USERS

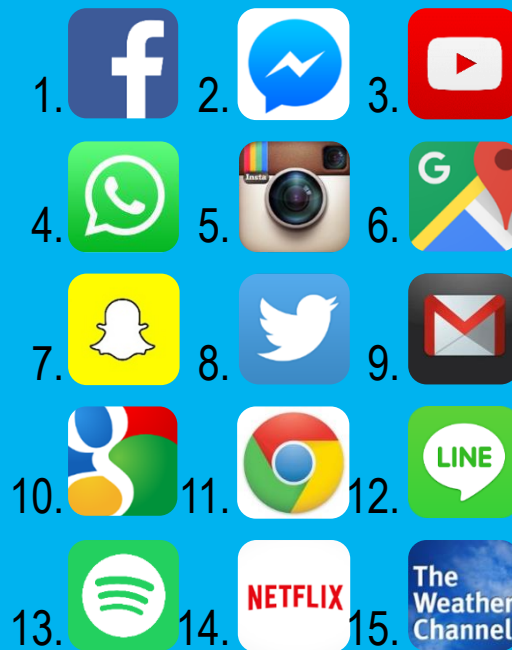
WORLDWIDE (EXCLUDING CHINA), FEBRUARY 14 - FEBRUARY 20, 2016

### ANDROID →



EXCLUDES APPS PUBLISHED BY OEMS

### IOS →



EXCLUDES PRE-INSTALLED APPS PUBLISHED BY APPLE

13  
APPS PER DAY

4/15  
Facebook

5/15  
Google



“  
IN THREE YEARS,  
SOCIAL WILL BE A  
‘MOBILE’ MEDIUM.  
”

ZENITH  
‘ALWAYS ON’  
SEPT 2009



Q3 2009 MOBILE  
PAGE VIEWS

72%

VS

Q3 2006 MOBILE  
PAGE VIEWS

17%



## KENYA – MOBILE PAYMENTS

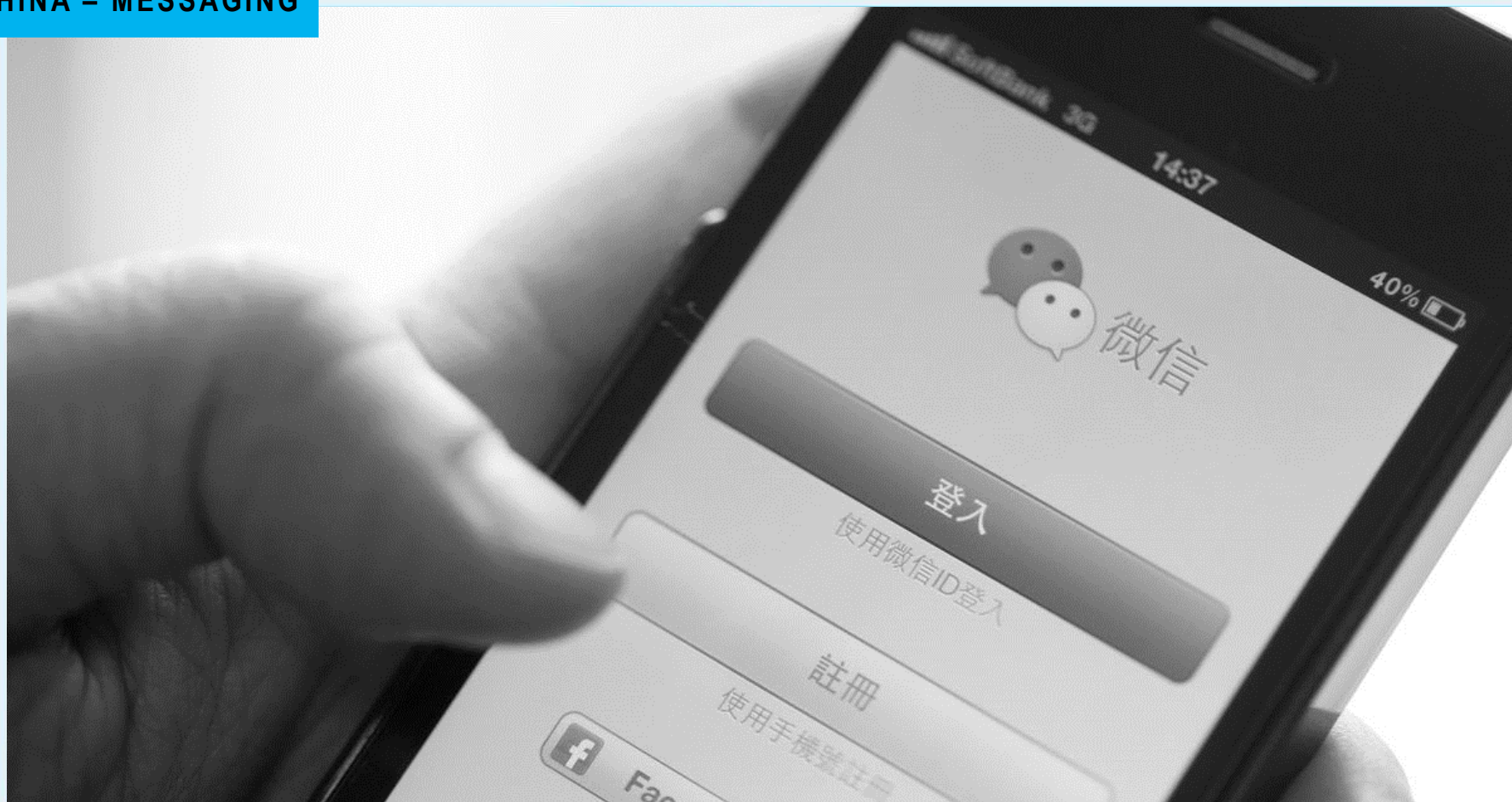


# Send pesa by phone

M-PESA is the new, easy and affordable way to send money home.









DATA

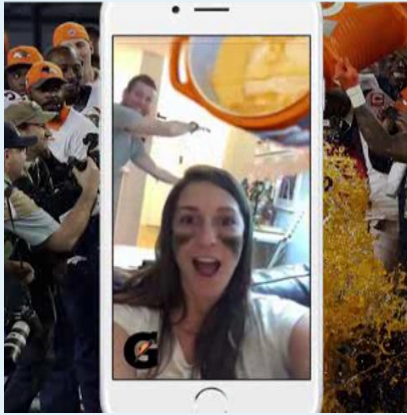


ACTIVITY



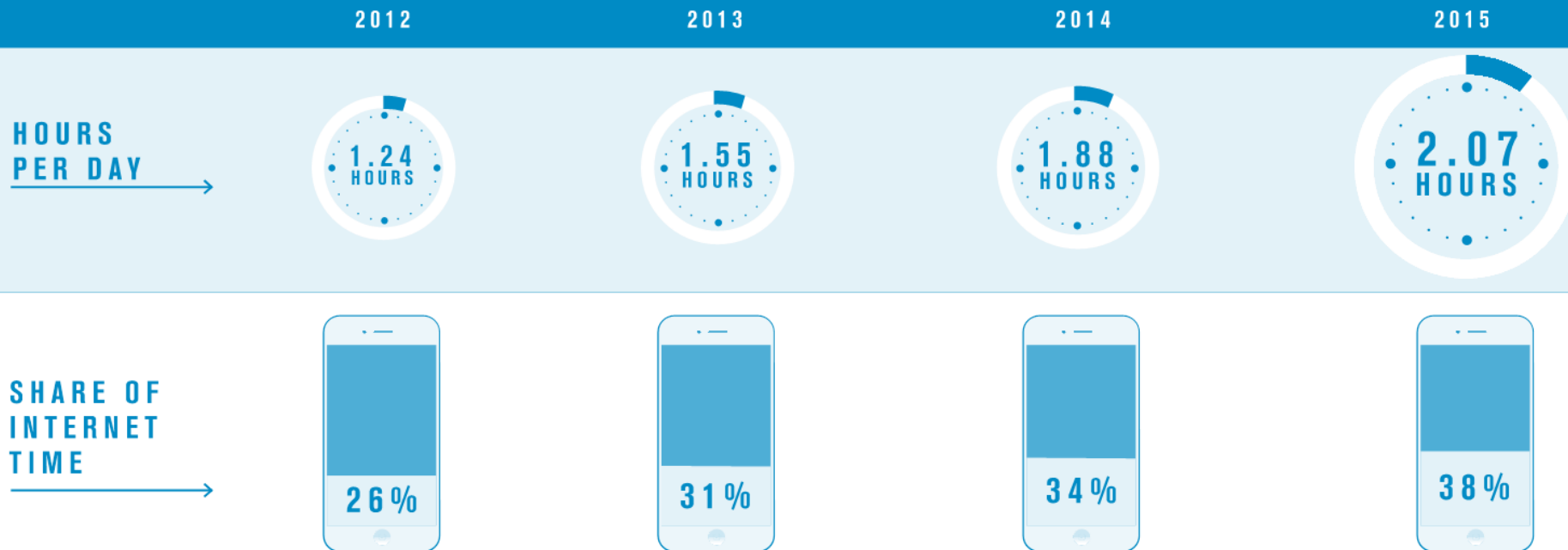
TIME

# WHY INTERNET TIME ON MOBILE PHONE IS IMPORTANT



# GAMECHANGING GROWTH IN MOBILE USAGE

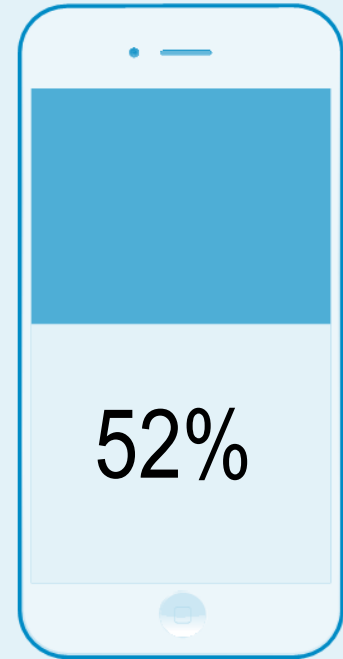
## DAILY TIME SPENT ON MOBILE





# 2017

GLOBAL MOBILE TIPPING  
POINT FOR 16 - 34 YEAR OLDS



SOURCE: GWI FEBRUARY 2016



**DATA**



**ACTIVITY**



**TIME**