

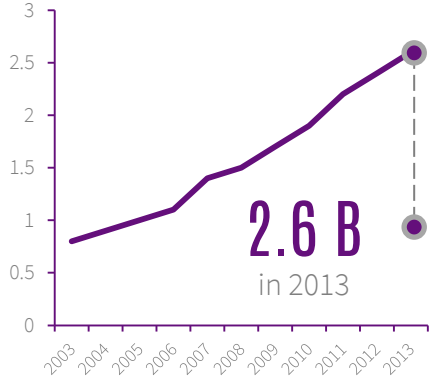
MARY MEEKER
INTERNET TRENDS REPORT 2014

WHAT'S IN IT FOR TELECOMS?

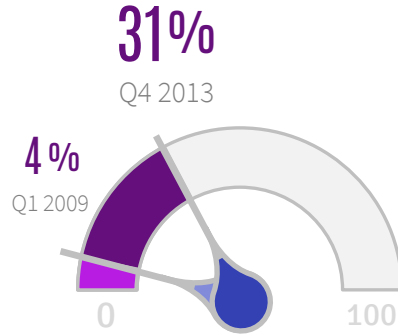


Kleiner Perkins partner, Mary Meeker's famous annual Internet report was recently published. What does it have to say for telecoms?

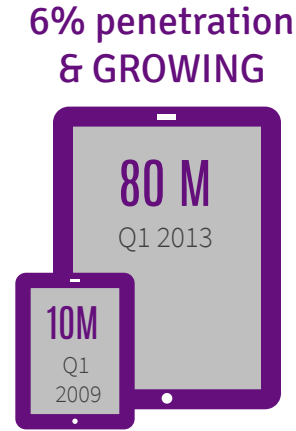
THE PIE IS GROWING



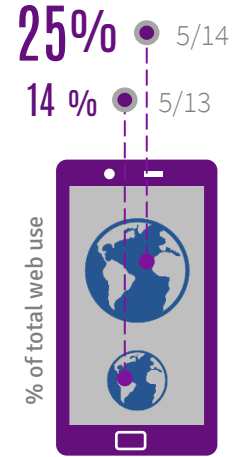
Internet users are growing



Smartphone penetration is growing



Tablet penetration is growing FAST



Mobile internet users are growing

AND THE WINNERS ARE..

400M

Active users

1.2B




Messages /day

100M

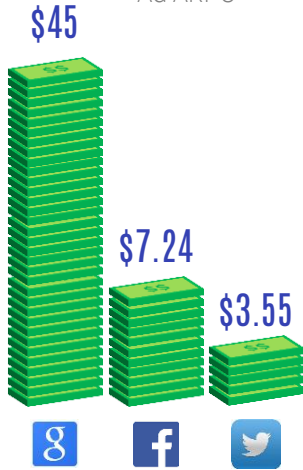
Active users






MESSAGING

-  WhatsApp
-  SnapChat
-  Viber

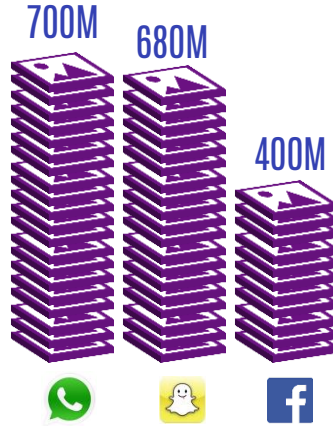
Ad ARPU






ADVERTISING

-  Google
-  Facebook
-  Twitter

Photos shared/day



PICTURE SHARING

-  WhatsApp
-  SnapChat
-  Facebook

SMART TV ADAPTORS





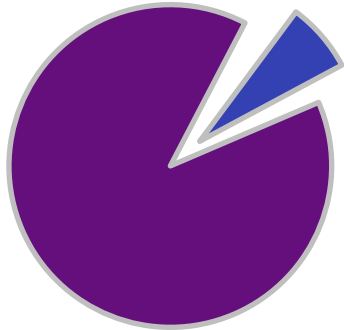


ON DEMAND APPS



THE FUTURE OF TV

WHAT DOES IT MEAN FOR TELECOMS?



A BIGGER INTERNET PIE MEANS
MORE ACCESS REVENUES

HOWEVER, A BULK OF NEW PROFITS ARE
BEING SIPHONED OFF BY OTT PLAYERS

**TELECOM IS EXPERIENCING
REDUCED RELEVANCE AS A SECTOR**

TOP SECTORS BY MARKET CAP

TECHNOLOGY
FINANCIALS
CONS. DISC.
HEALTHCARE
INDUSTRIALS
TELECOM
CONS. STAPLES.
ENERGY
MATERIALS
UTILITIES

2010

TECHNOLOGY
FINANCIALS
HEALTHCARE
CONS. DISC.
INDUSTRIALS
CONS. STAPLES.
ENERGY
MATERIALS
UTILITIES
TELECOM

2014

THE WAY FORWARD



Mary Meeker 2014

“Great companies
grow revenue,
make profits and
invest in the future”

“Telecoms must invest in delivering their
own cloud & OTT solutions”