# mobidia

## Enhancing Wireless Data

*Mobidia Overview – April 23, 2013*

TELECOM COUNCIL 2010 SPIFFY AWARD NOMINEE

RED HERRING WINNER 50 CANADA

TECHNOLOGY IMPACT AWARDS WINNER

# Company Snapshot

| | |
|---|---|
| **What We Do** | Mobidia knows mobile data. Our unique, crowd-sourced, mobile analytics platform helps smartphone users save money on data plans while increasing revenue & saving costs for mobile operators and app/service vendors. The platform is driving the next evolution in application discovery, recommendation, and mobile advertising |
| **Target Markets** | 6B+ wireless subscribers, 600+ mobile operators, $10B+ mobile advertising market. >4M app installs to date, trending to >25M in 2013 |
| **Customers** | >20 mobile operators and OEMs promoting, featuring, and using Mobidia solutions including AT&T, Telefonica, T-Mobile, Vodafone, and Samsung. Mobidia analytics are also being used by tier-1 app vendors such as Skype Twitter and Gree. |
| **Employees** | Mobidia has built its team with seasoned business and technical telecom veterans with experience at startups and established companies including Microsoft, Nokia, Samsung, Motorola, LG, Ericsson, Harris, Lucent, and AOL/Tegic. Our employees and board also have extensive mobile advertising and big data experience |
| **Key Investors** | Discovery Capital (Vancouver)<br>Lions Capital (Vancouver)<br>Epic Capital (Toronto)<br>Front Street Capital (Toronto)<br>Alpha North Asset Mgmt (Toronto)<br>BDC (Ottawa) |
| **Founded** | 2006 |
| **HQ** | Vancouver, BC with local presence in US,UK,HK, Singapore |
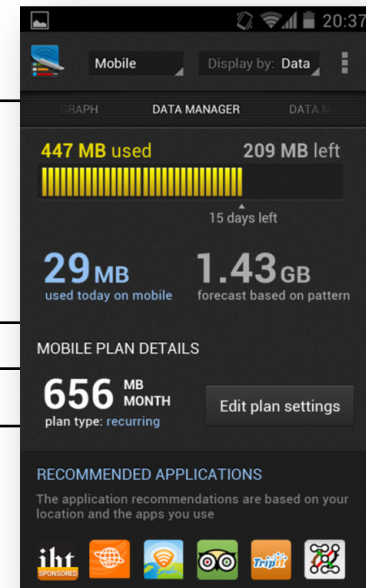
# *"Bill Shock" Is a Massive Problem that is Getting Worse*

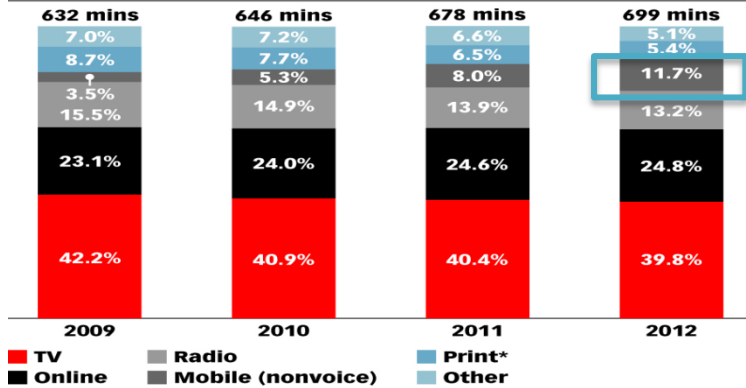"$201,000 phone bill shocks Florida woman"     The *Associated Press Oct 2011*

"68% of subscribers in Asia use data while roaming…87% have received 'bill shock' before…"     *ZNET Asia 2011*

**"Stuck with $10,000 Phone Bill.** How Travelers unwittingly Rack up Roaming Charges"
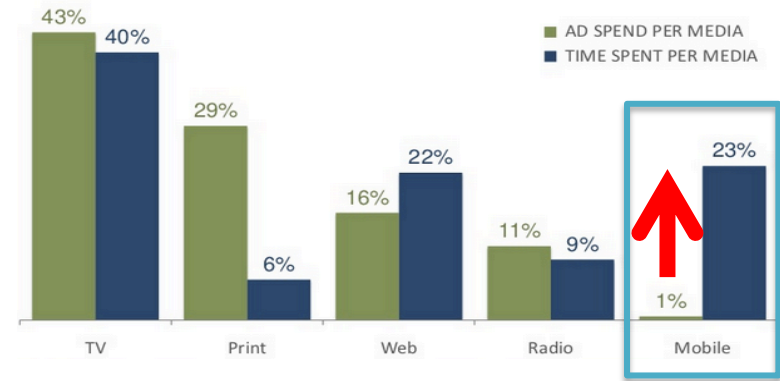*WSJ April 2012*

- **1 in 6** wireless subscribers experience bill shock (FCC)
- **6.6B** wireless subscribers
- Smartphone penetration **40-50%+** in western countries
- Smartphone usage (internet access) forecasted to increase by **35%** in US
- Data **50%** of ARPU in US
- Tier 1 US operator "we lose **$10M** every month to 'bill shock'"

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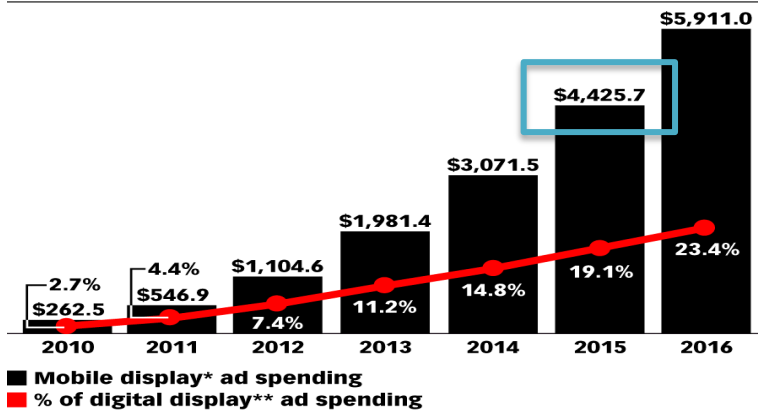# "Bill Shock" brings us to the Mobile Ad Market which will *triple* by 2015



**Share of Time Spent per Day with Major Media by US Adults, 2009-2012**
*% of total*

| | 2009 (632 mins) | 2010 (646 mins) | 2011 (678 mins) | 2012 (699 mins) |
|---|---|---|---|---|
| Other | 7.0% | 7.2% | 6.6% | 5.1% |
| Print* | 8.7% | 7.7% | 6.5% | 5.4% |
| Mobile (nonvoice) | 3.5% | 5.3% | 8.0% | 11.7% |
| Radio | 15.5% | 14.9% | 13.9% | 13.2% |
| Online | 23.1% | 24.0% | 24.6% | 24.8% |
| TV* | 42.2% | 40.9% | 40.4% | 39.8% |

**US Mobile Display* Ad Spending, 2010-2016**
*millions and % of digital display** ad spending*

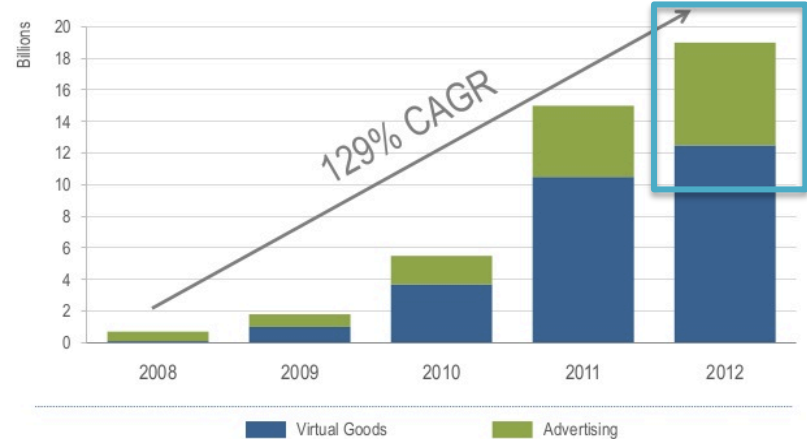| Year | Mobile display* ad spending | % of digital display** ad spending |
|---|---|---|
| 2010 | $262.5 | 2.7% |
| 2011 | $546.9 | 4.4% |
| 2012 | $1,104.6 | 7.4% |
| 2013 | $1,981.4 | 11.2% |
| 2014 | $3,071.5 | 14.8% |
| 2015 | $4,425.7 | 19.1% |
| 2016 | $5,911.0 | 23.4% |

Note: *includes banners, rich media and video on WAP sites, mobile HTML sites and embedded in-application/in-game advertising; ad spending on tablets is included; **includes banners, rich media, sponsorships and video
Source: eMarketer, Sep 2012
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www.**eMarketer**.com

**2011 U.S. Ad Spending vs. Consumer Time Spent by Media**

- AD SPEND PER MEDIA
- TIME SPENT PER MEDIA

| | TV | Print | Web | Radio | Mobile |
|---|---|---|---|---|---|
| Ad spend per media | 43% | 29% | 16% | 11% | 1% |
| Time spent per media | 40% | 6% | 22% | 9% | 23% |

**Mobile In-App Revenue**

129% CAGR

- Virtual Goods
- Advertising

*Sources: eMarketer, Flurry, Mary Meeker*

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# *My Data Manager is Core to Everything We Do*



- Make data usage transparent and understandable
- Decrease bill shock and customer care costs
- Empower subscribers to understand data and roaming better
- Sell more roaming plans and encourage more usage

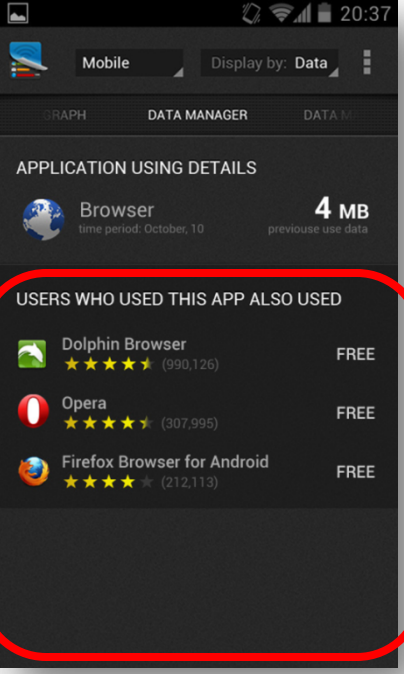- The app's utility drives user downloads and operator partnerships

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# *Introducing* **App Discovery, Recommendation, & Promotion**
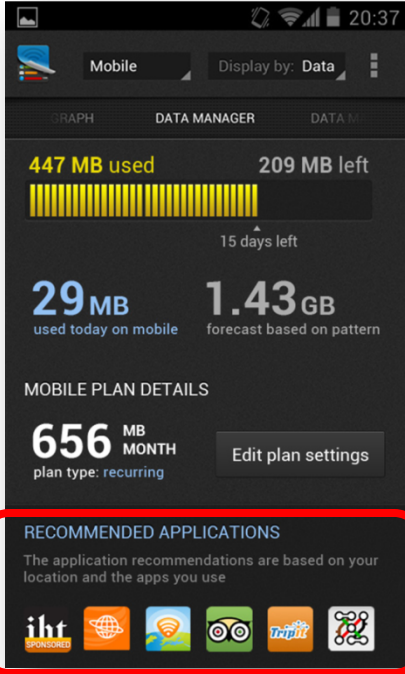


**RECOMMENDED SPONSORED APPS**
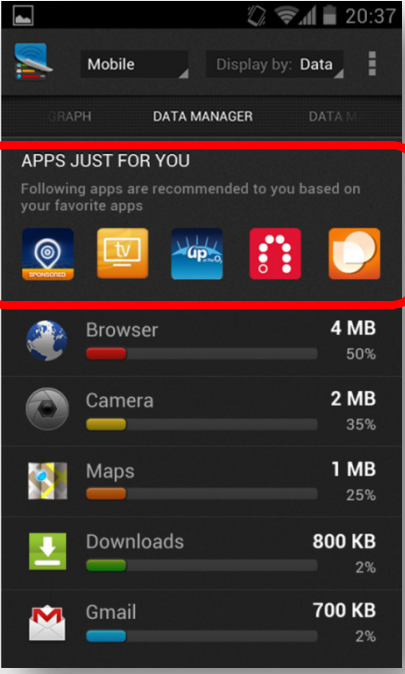
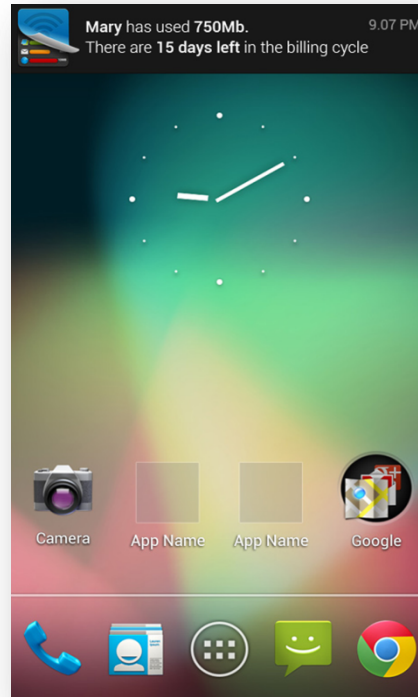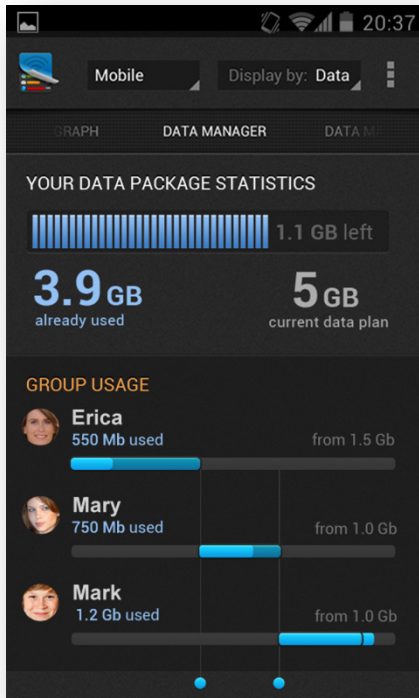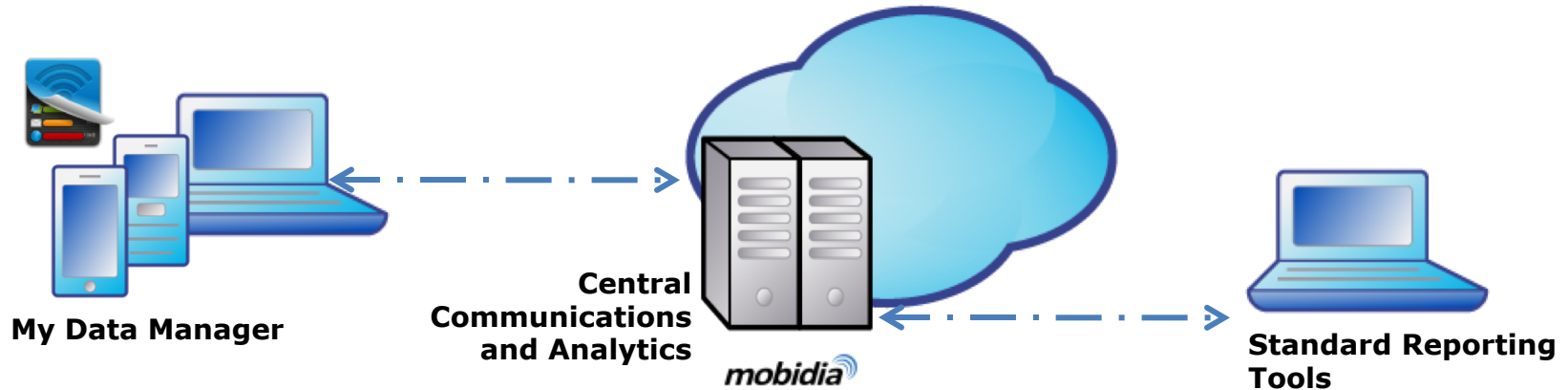**RECOMMENDED BASED ON USAGE**

**RECOMMENDED BASED ON NETWORK**

**IN-APP PUSH MESSAGE ADS**

# Introducing *Shared Group Plan Support*



## Including e-mail notifications

# *Unique Visibility of Usage with Analytics*



My Data Manager

Central Communications and Analytics

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Standard Reporting Tools

## Unique Device-based Analytics

- App and data usage trends
- 3G,4G, LTE, Wi-Fi, Roaming visibility
- 1M+ daily reports and growing
- Data being reported back from 600+ different mobile operator networks
- 150,000+ different apps and OS components reported backed
- Global coverage with hundreds of countries

## Key Benefits

- Identify app trends across network and plan types
- Identify data heavy apps
- Target data plans and offers
- Develop and optimize OTT plans
- Plan global launch strategies
- Benchmark competitors

**Completely Optional & Anonymous for Users**

# *Popular Informa/Mobidia Whitepaper Series*

- Understanding Today's Smartphone Users

- Part 1: Demystifying Data Usage Trends on Cellular and Wi-Fi Networks

- Part 2: An Expanded View by Data Plan, Size, OS, Device Type, and LTE

- Part 3: An Analysis of Data-Usage Patterns in the World's Most Advanced 4G LTE Markets

- Part 4: Understanding the Role of Managed Public Wi-Fi in Today's Smartphone User Experience

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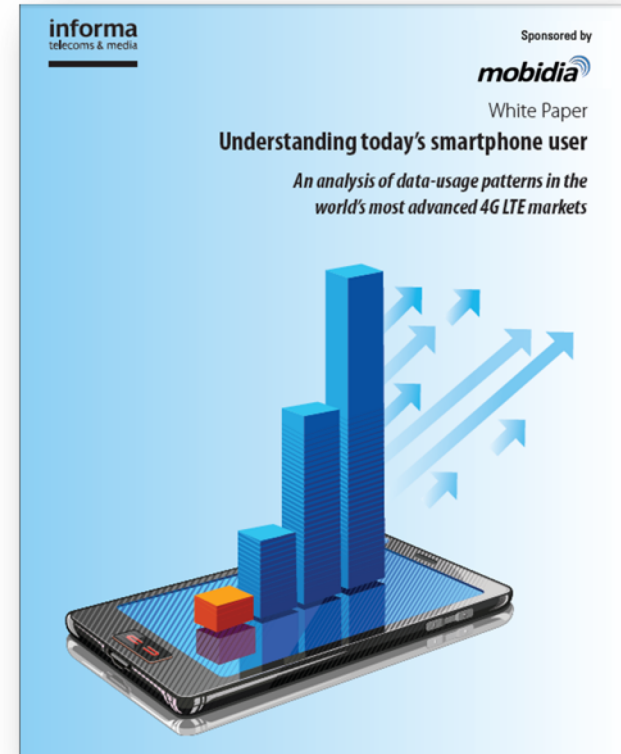
# *Wi-Fi (Public and Private) and Cellular Data Usage*

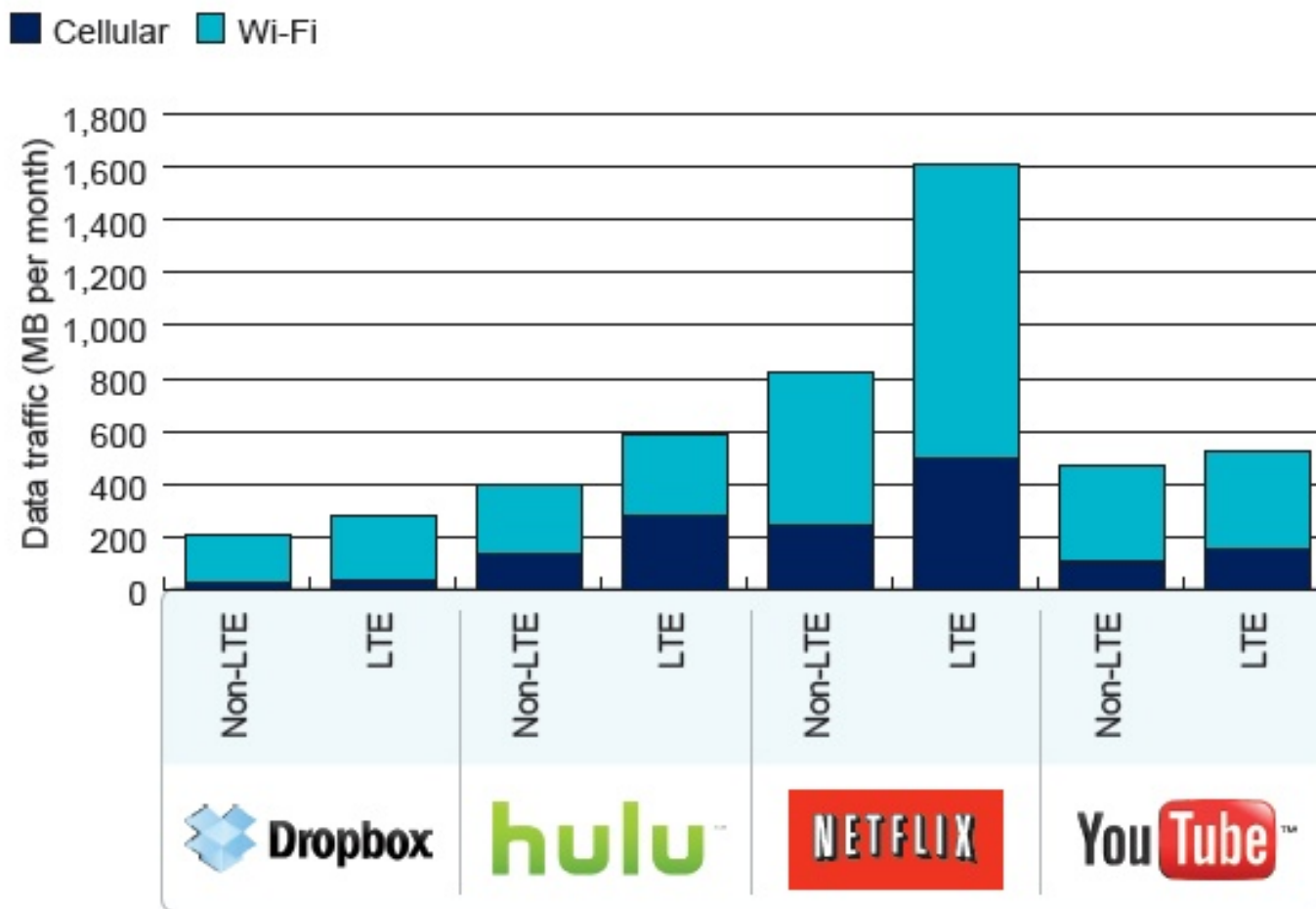**Distribution of Android Smartphone-Originated Traffic Across Networks, Jan 2013**



Legend: ■ Cellular ■ Self-provisioned/ private Wi-Fi ■ Managed public Wi-Fi

Countries shown: Thailand, France, Brazil, US, Italy, India, UK, Hong Kong, Germany, Japan, Singapore, South Korea

# *Example Network Usage Trends*

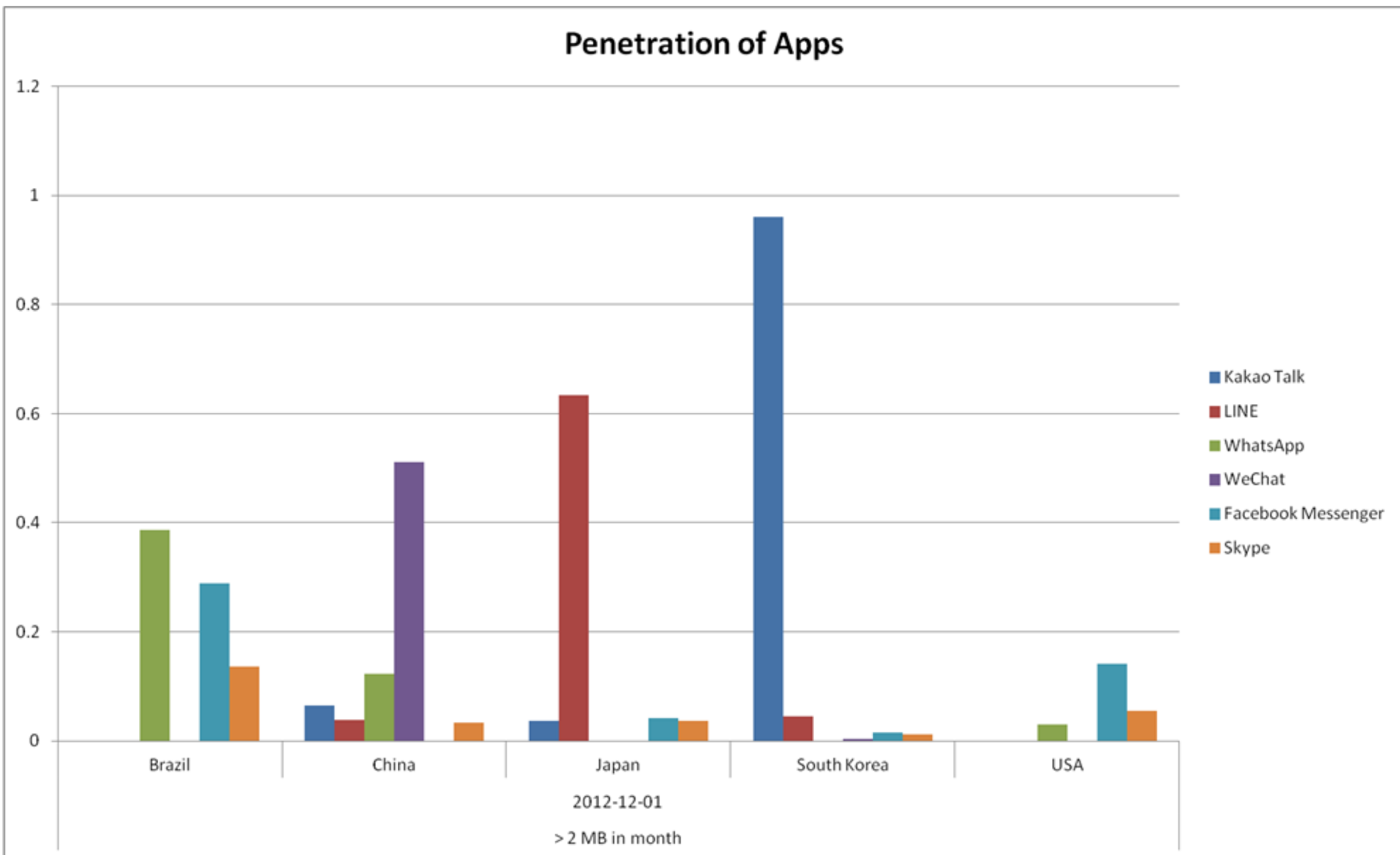**UK, smartphone-originated data traffic distribution, by operator, Jan 2012**

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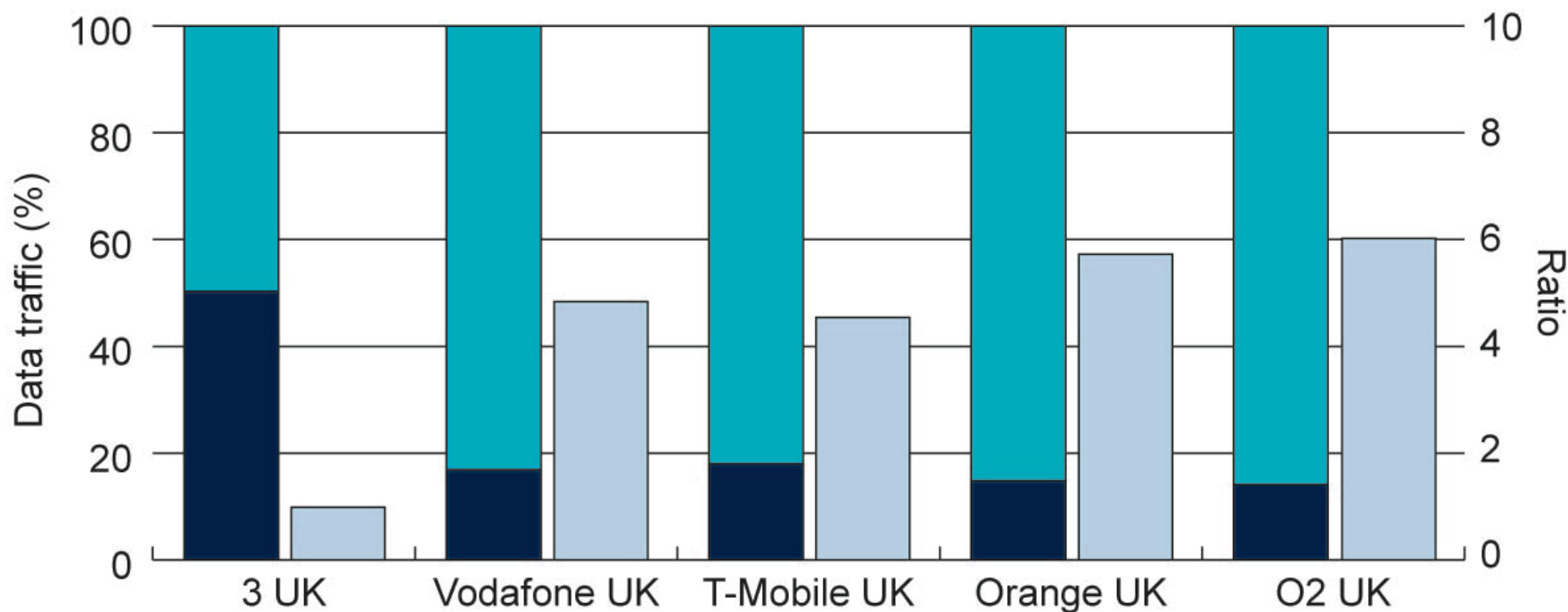
# *Example LTE App Usage*

**US, Smartphone-originated Traffic Distribution by Access Technology On LTE Versus non-LTE Android Smartphones, Selected Apps, May-12**
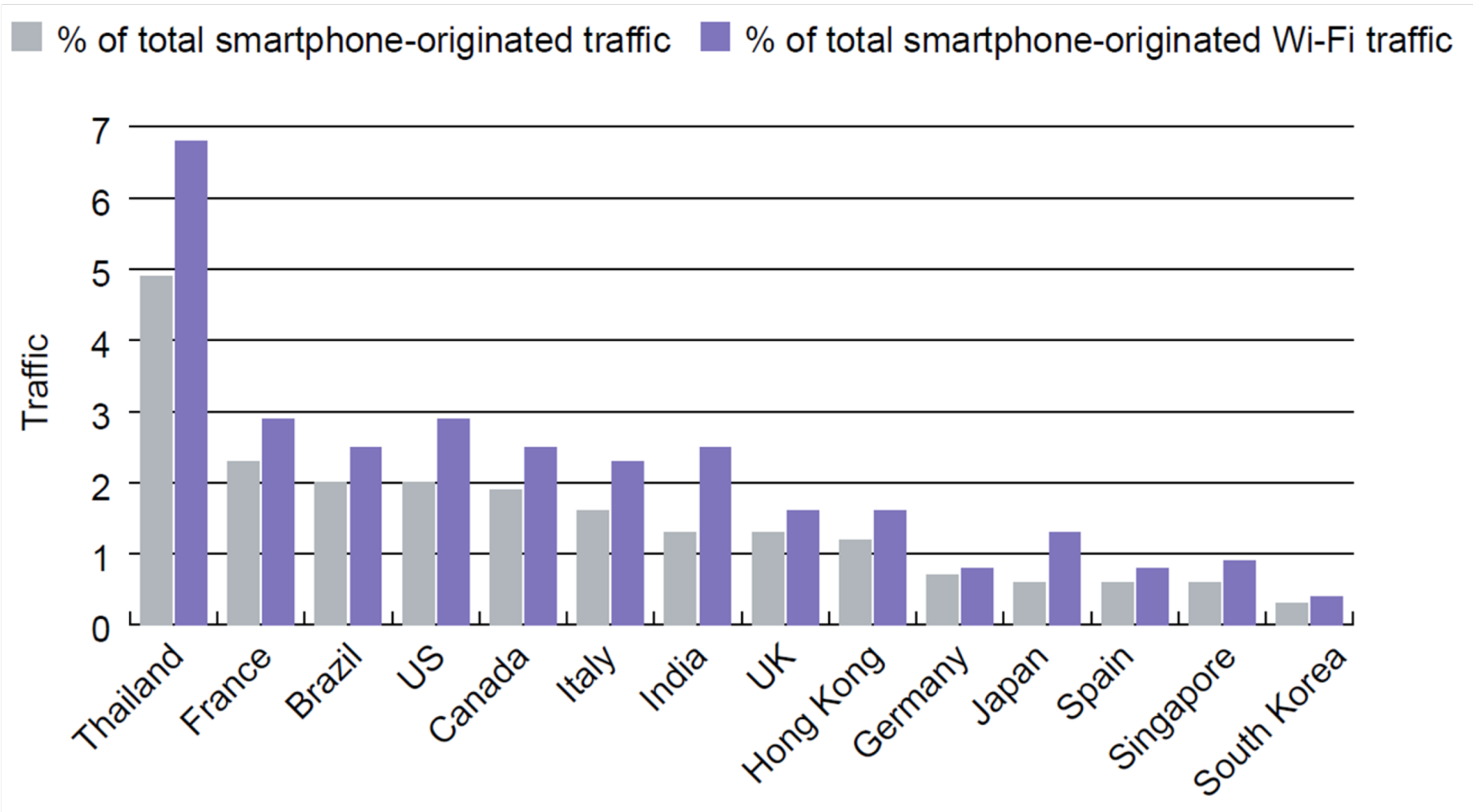
# *Messaging & VOIP Apps, Penetration Rate*

# Managed Public Wi-Fi Traffic

**Managed Public Wi-Fi Traffic as a Percentage of Android Smartphone-Originated Total Traffic and of Smartphone-Originated Wi-Fi traffic, Jan 2013**



Legend: ▇ % of total smartphone-originated traffic  ▇ % of total smartphone-originated Wi-Fi traffic

Y-axis: Traffic (0–7)

Categories: Thailand, France, Brazil, US, Canada, Italy, India, UK, Hong Kong, Germany, Japan, Spain, Singapore, South Korea
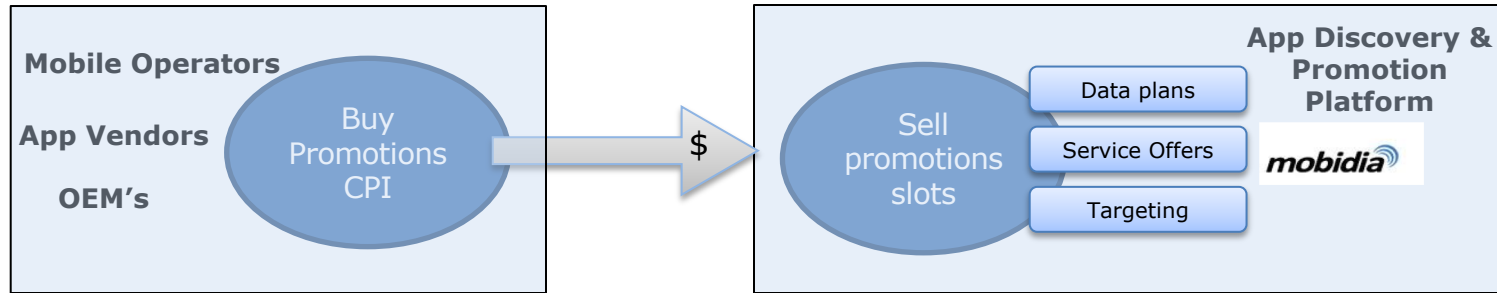
# *Example Mobile Metrics Customers*

- **International Operator Group**
  - Pricing and strategy decisions
  - Tracking usage 25 KPIs on a quarterly basis
  - 20 network countries + US and Korea benchmarking

- **Leading IM Vendor**
  - Strategy, marketing (market entry, awareness) decisions
  - 35 countries and 49 competitors
  - Quartering tracking 25+ usage, penetration KPIs

- **Leading Gaming Vendor**
  - Product and market entry decisions
  - 30 countries, 50 competitors

- **$4B NYC Hedge Fund**
  - Investing decisions
  - Bi-weekly app tracking

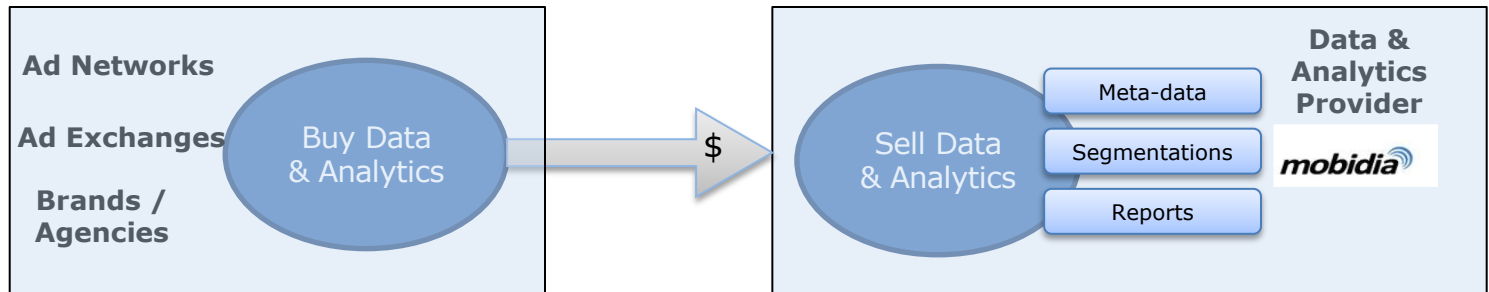**mobidia**

# *Unique Usage Context Drives Mobile Ad Opportunities*

## 1. Custom Promos & App Recommendation

Mobile Operators

App Vendors

OEM's

Buy Promotions CPI → $ → Sell promotions slots

**App Discovery & Promotion Platform**
- Data plans
- Service Offers
- Targeting

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*Buy spots for promotional campaigns, service offers, application installs*

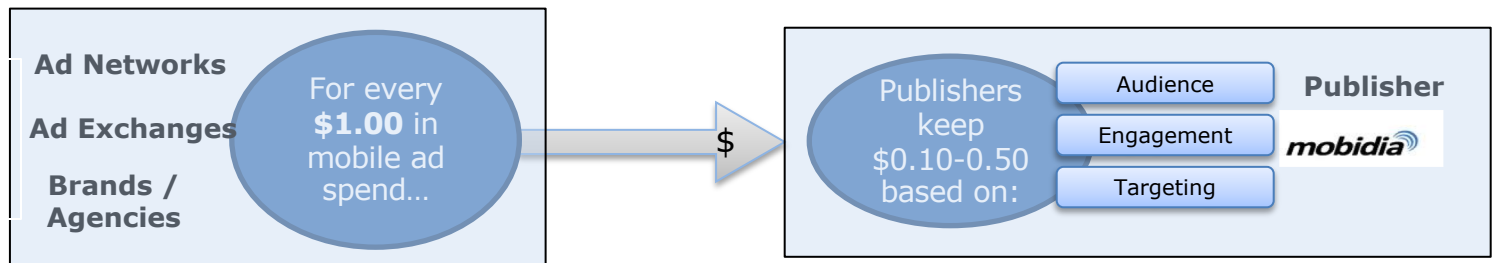*Sell app discovery slots. Context-sensitive promotional platform*

## 2. Unique Data for Targeting

Ad Networks

Ad Exchanges

Brands / Agencies

Buy Data & Analytics → $ → Sell Data & Analytics

**Data & Analytics Provider**
- Meta-data
- Segmentations
- Reports

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*Buy audience data, analytics, segmentations, & reports to better understand audiences*

*Sells audience data, analytics, segmentations and reports*
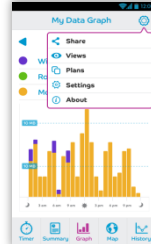
## 3. Unique Data for Targeting

Ad Networks

Ad Exchanges

Brands / Agencies

For every **$1.00** in mobile ad spend… → $ → Publishers keep $0.10-0.50 based on:

**Publisher**
- Audience
- Engagement
- Targeting

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*Buy ad-space to reach target audiences*

*Sells ad-space, sponsorships, and ability to recommend apps and physical goods to users*

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# Company Milestones and Progress
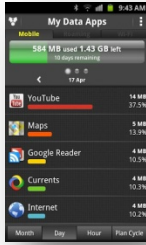


| Prototype to commercial Android & IOS Apps | White-labels First Crowd-source Mobile Metrics Analytics Tablets | App Recommendation Mobile Ads Group Plans |
|---|---|---|

**2011** ●     **2012** ●     **2013** ●

**2011**
- First **1M** users
- **4.7** star review rating

**2012**
- Over **3M** users
- **20** operators & OEM's
- First white label deals
- **4** analytics customers
- Small pre-load deals
- Overwhelming response to analytics whitepaper series

**2013**
- **4M** users to **25M+**
- First ad customers
- First significant pre-load deals

# Press & Lead Generation

# *Customers & Pipeline*



**Partners** | **Customers** | **Pipeline**

- Strong set of OEMs and Operators promoting Mobidia
- Growing base of customers
- Large pipeline of operators, OEM's, app vendors, financial institutions, analyst and consulting companies
   - Revenue and pre-load distribution deals

# *Summary*

- Mobidia's My Data Manager is leading the way in helping people manage mobile app usage globally

- White-labeling and customization make the core technology a platform for differentiation

- App-based context will drive the next evolution of app discovery, promotion, and mobile ads

- Mobidia's mobile metrics are delivering a valuable and unique view of the mobile space

## *Download: www.mobidia.com/MDM*

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