



# Vodafone & SeniorNet

## April 2014

James Smith



# Re-Imagination of Computing Devices

**THEN...**  
(Desktops / Notebooks)



**NOW...**  
(Tablets / Smartphones)



# Re-Imagination of News & Information Flow

## THEN...

Delayed / Dedicated Reporters + Cameramen /  
Regional or National Reach



## NOW...

(Twitter)

Real-Time / Citizen Reporting via  
Mobile Devices / Global Reach



# Re-Imagination of Note Taking

THEN...

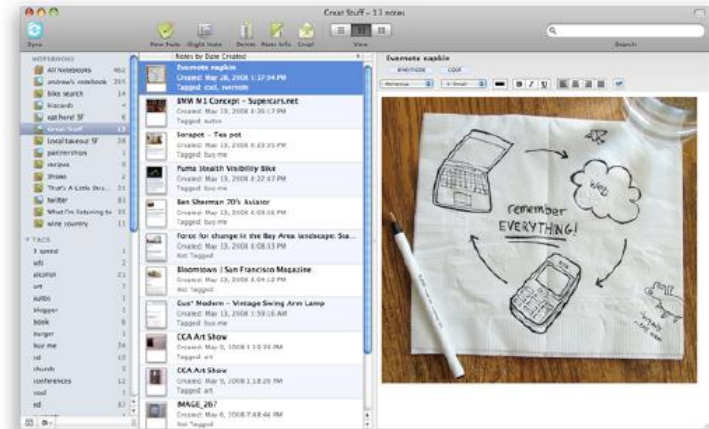
Pencil + Notepad



NOW...

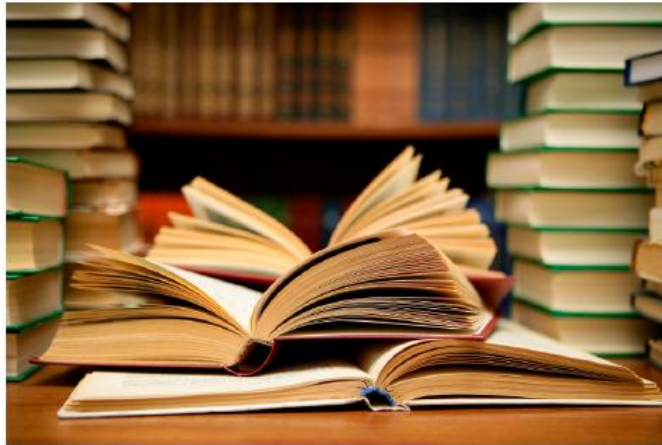
(Evernote)

Always Synced / Multi-Device /  
Picture + Audio Enabled / Searchable



# Re-Imagination of Books

## THEN...



## NOW...

(Amazon Kindle / Apple iBooks)





# What Happens in an Internet Minute?



## And Future Growth is Staggering



Sent to me by my 9 year old son!





- **1,106,518** members on LinkedIn who live in New Zealand.
- Close to **25%** of New Zealand's residents are on LinkedIn! Holy Moly that's a lot!
- (In the US we might have 48,146,909 members – but with a population of 318 million people, that means only about **15% of US citizens are on LinkedIn.**



## Why we're putting mobile first

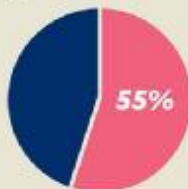


Average time  
spent on BNZ's  
mobile banking  
app is 2 mins...



...across 196  
countries

Over 55% of your  
personal banking  
happens on the app...



Out of these:  
60% iOS  
35% Android  
5% Other



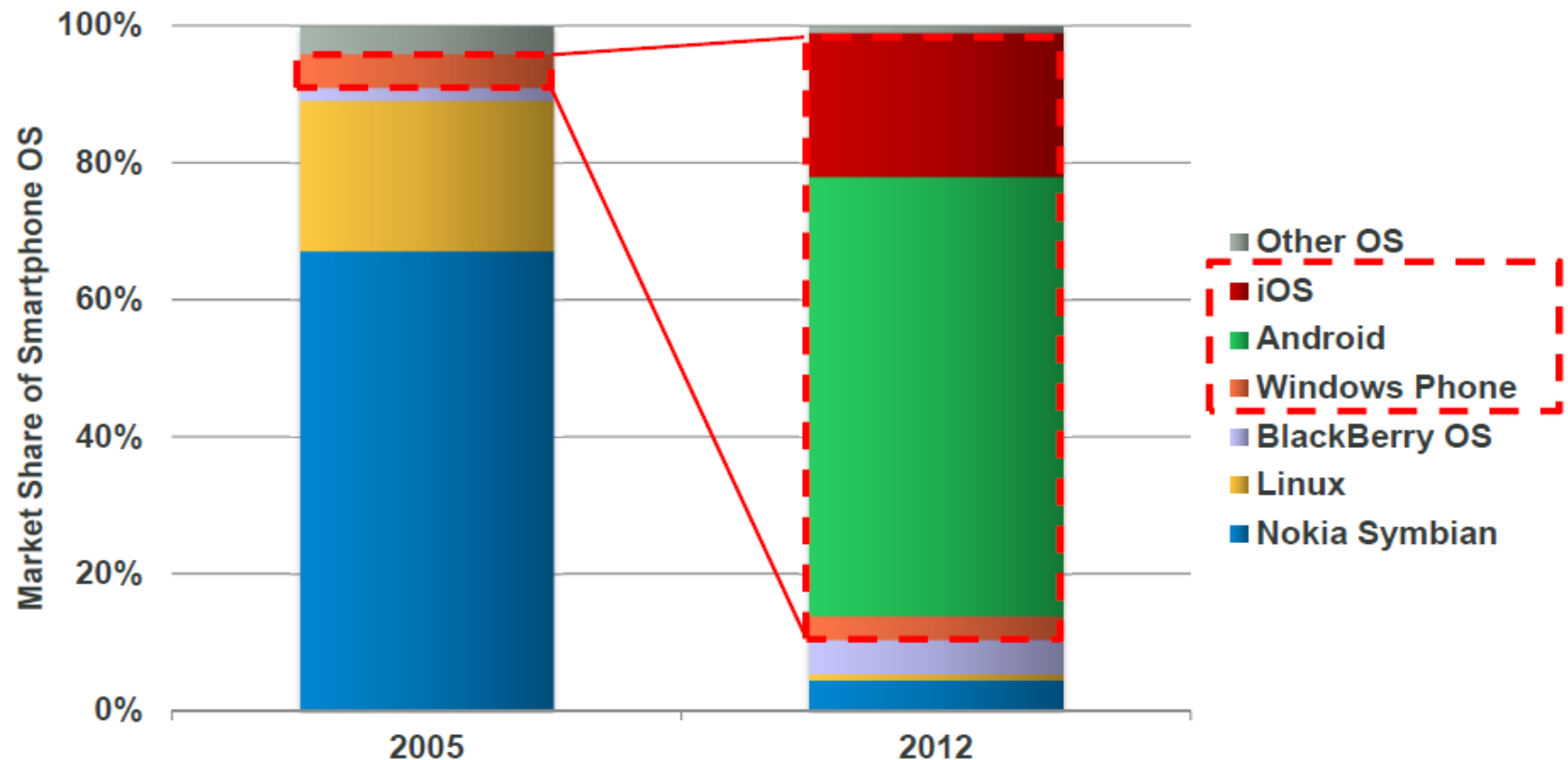
Mobile only users are growing  
by 6% each month

Customers with  
YouMoney are twice  
as likely to bank on  
the go than those  
without



# Global Smartphone Operating Systems 'Made in USA'... 88% Share from 5% Six Years Ago

**Global Smartphone Operating System Market Share**  
(by Units Shipped), 2005 vs. 2012



Source: KPCB

Long Ago, People Danced @ Concerts,  
Now They Video / Click / Share / Tweet...

**1990s**



**2010s**



Source: KPCB



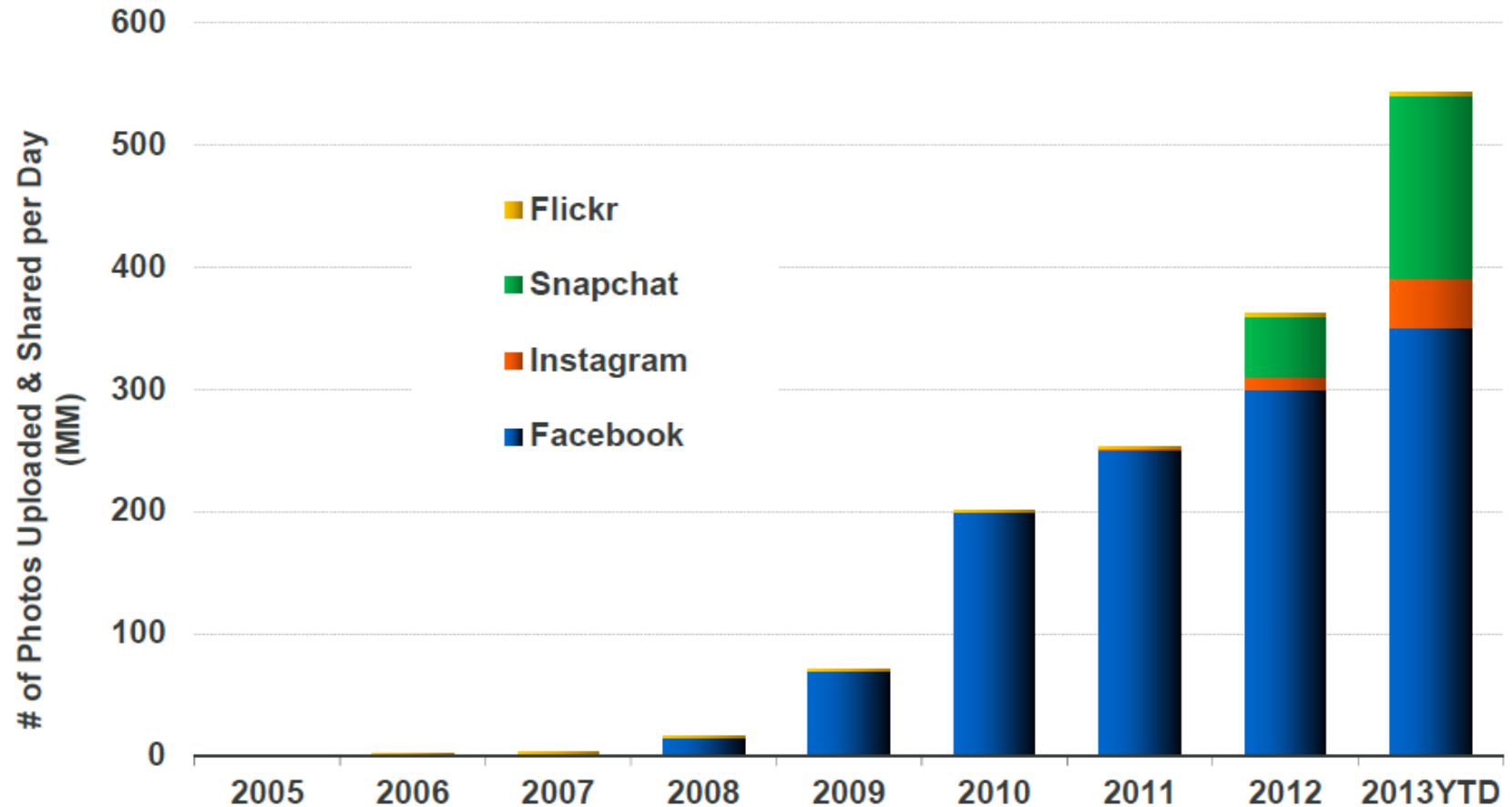
@lvincent

#brandattch



# Photos = 500MM+ Uploaded & Shared Per Day, Growth Accelerating, on Trend to Rise 2x Y/Y...

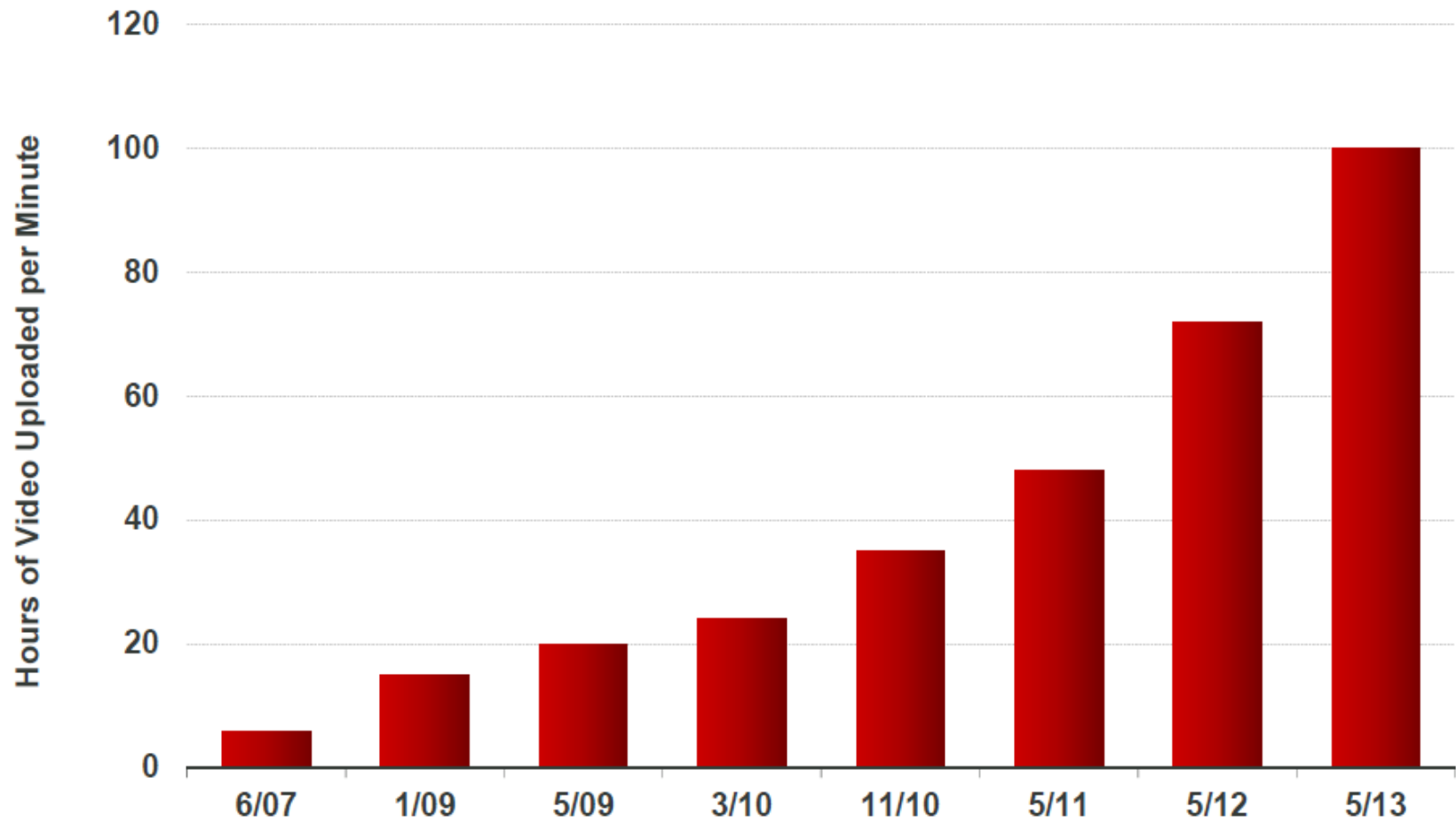
Daily Number of Photos Uploaded & Shared on Select Platforms, 2005-2013YTD



Source: KPCB

# Video = 100 Hours Per Minute Uploaded to YouTube, Up from ~Nada Six Years Ago

YouTube Hours of Video Uploaded per Minute, 6/07 – 5/13



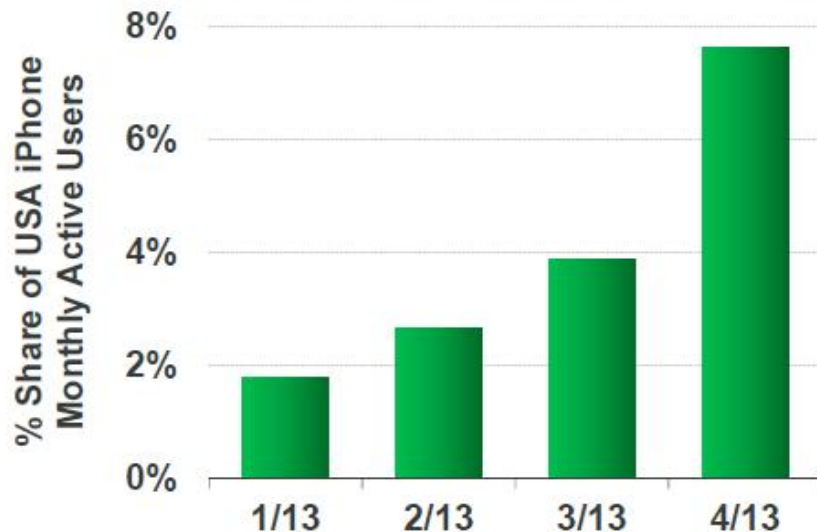
Source: KPCB

# Video (Short-Form + Persistent) = Ramping Fast

## Twitter Vine

**6 Second Videos  
2x M/M Growth**

Vine iOS App Monthly Active Users (MAUs)  
as % of Total USA iPhone MAUs, 1/13-4/13



## Dropcam (\$149 ASP)

**More Video  
Uploaded per Minute Than YouTube**



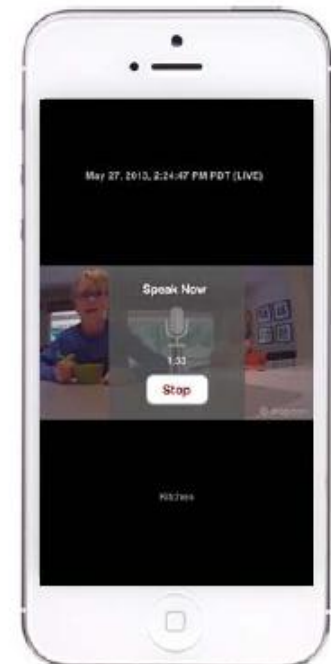
# Opt-In Video – ‘Big Brother’ Meets Big Mother?

**30% of Dropcam viewers used Talk Back to interact over past 2 weeks**

*When I am on the road, I still join my husband in singing bedtime lullabies using Dropcam, a Wi-Fi video monitoring camera that streams to my phone and computer.*

– Randi Zuckerberg

## Parents Can See & Talk With Children While Away From Home



Source: Dropcam, 5/13. Mashable, 4/13



# Sound = Emerging as Voice Comes Back to Phones...

## SoundCloud

11 Hours of Sound  
Uploaded per Minute



## Tencent WeChat

400MM+ Users, 4x Y/Y



# Win-Win-Win Sharing = Growing Quickly – You Help Me, I Help You, We Help Others

## Waze

- 48MM Users, +2x Y/Y
- 1B+ Miles Driven per Month w/ Waze Open



## Jawbone UP

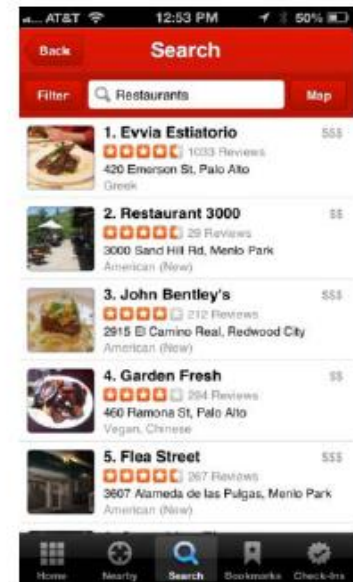
Per Day...

- Billions of Steps
- 700K+ Hours of Sleep
- 5x App Interactions per User



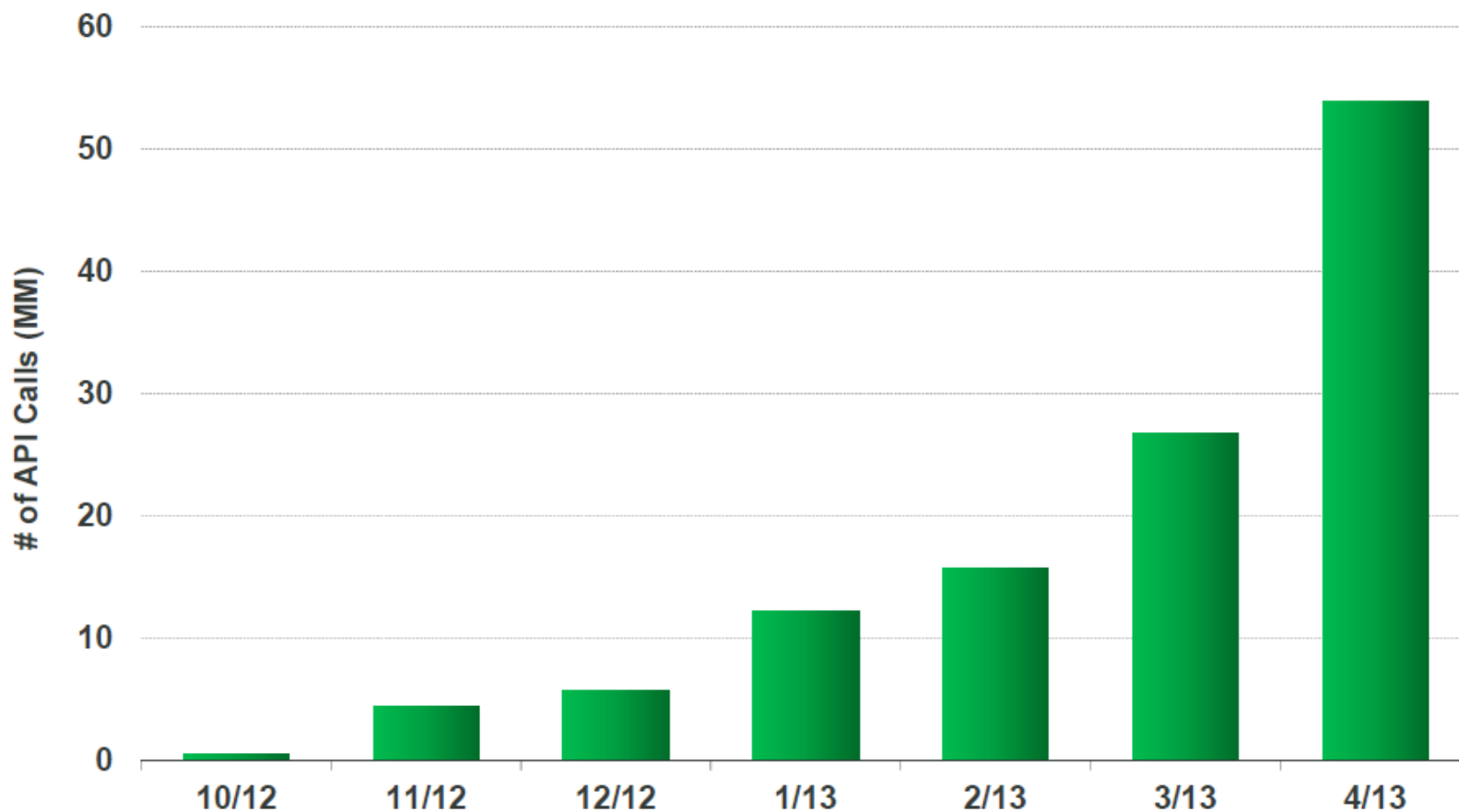
## Yelp

- 102MM Users, +43% Y/Y
- 39MM User-Generated Reviews, +42% Y/Y



# Fitness Data on Mobile + Wearable Devices = ~2x Month-on-Month Growth

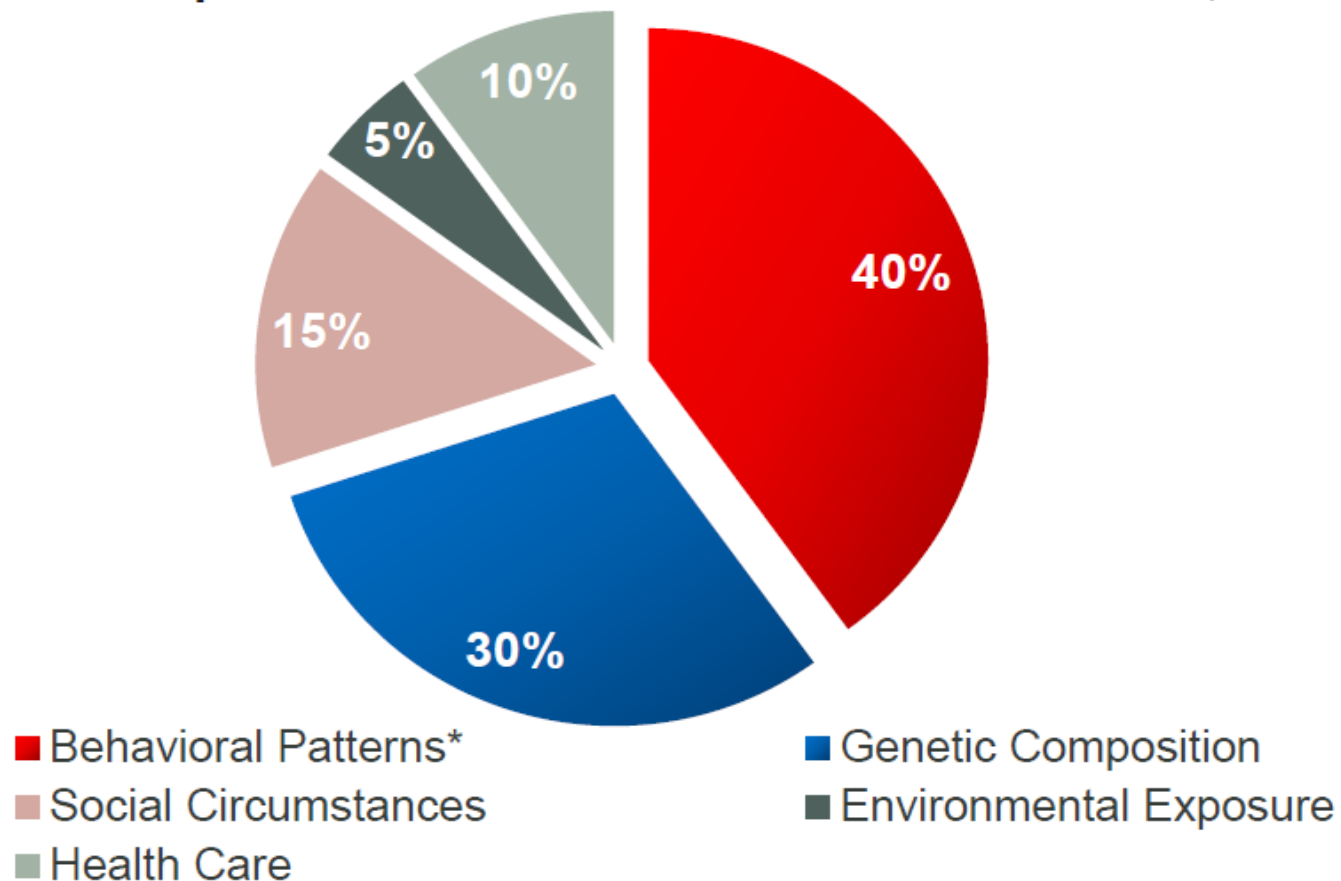
MyFitnessPal - # of API Calls\*, 10/12 – 4/13



Source: KPCB

# Health Outcomes – Behavior (at 40%) is Biggest Driver of Premature Death

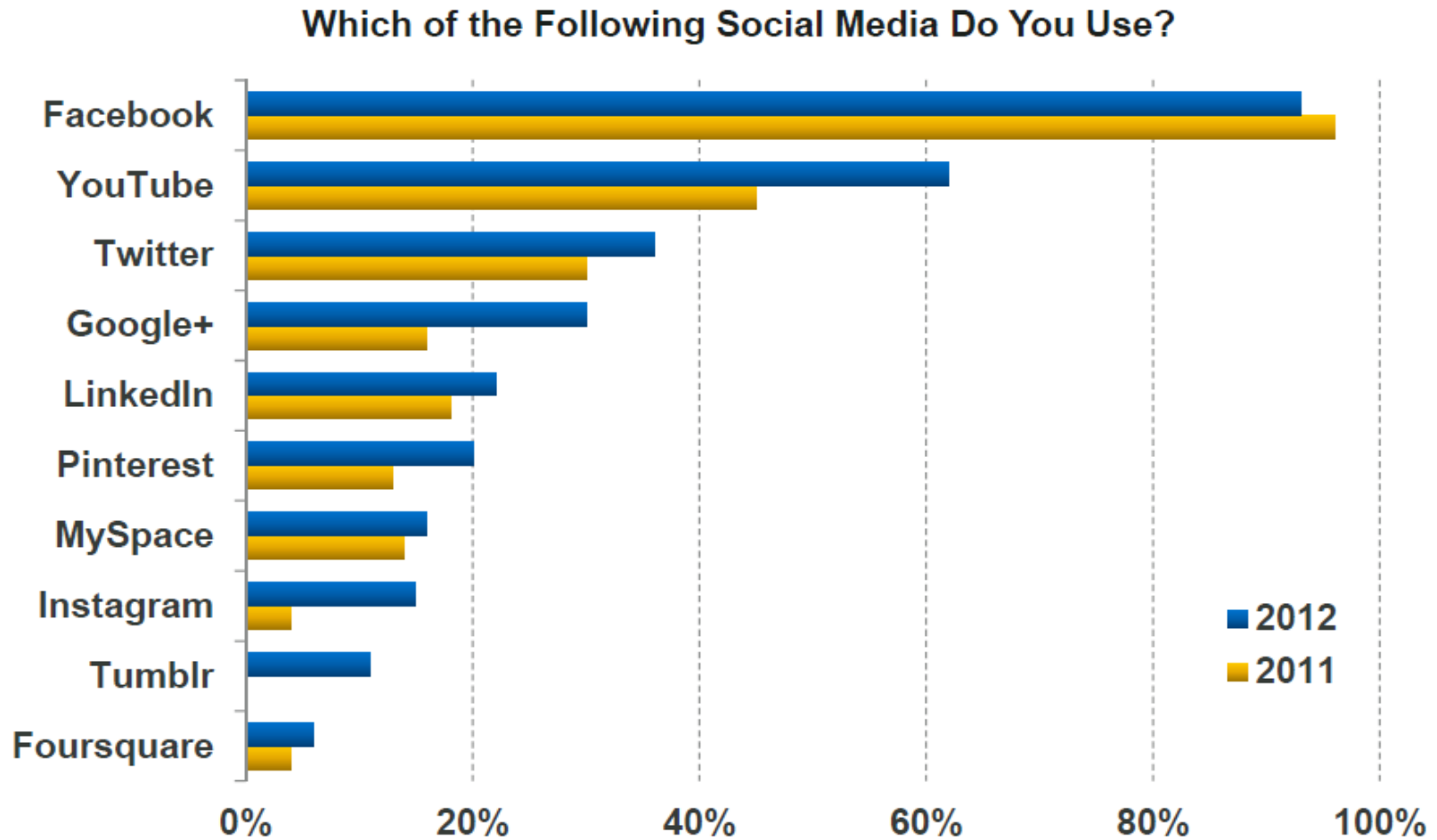
**USA Proportional Contribution to Premature Death, 2007**



\*Smoking: 44%, Obesity & Inactivity 37%, Alcohol 9%, Other 10%.

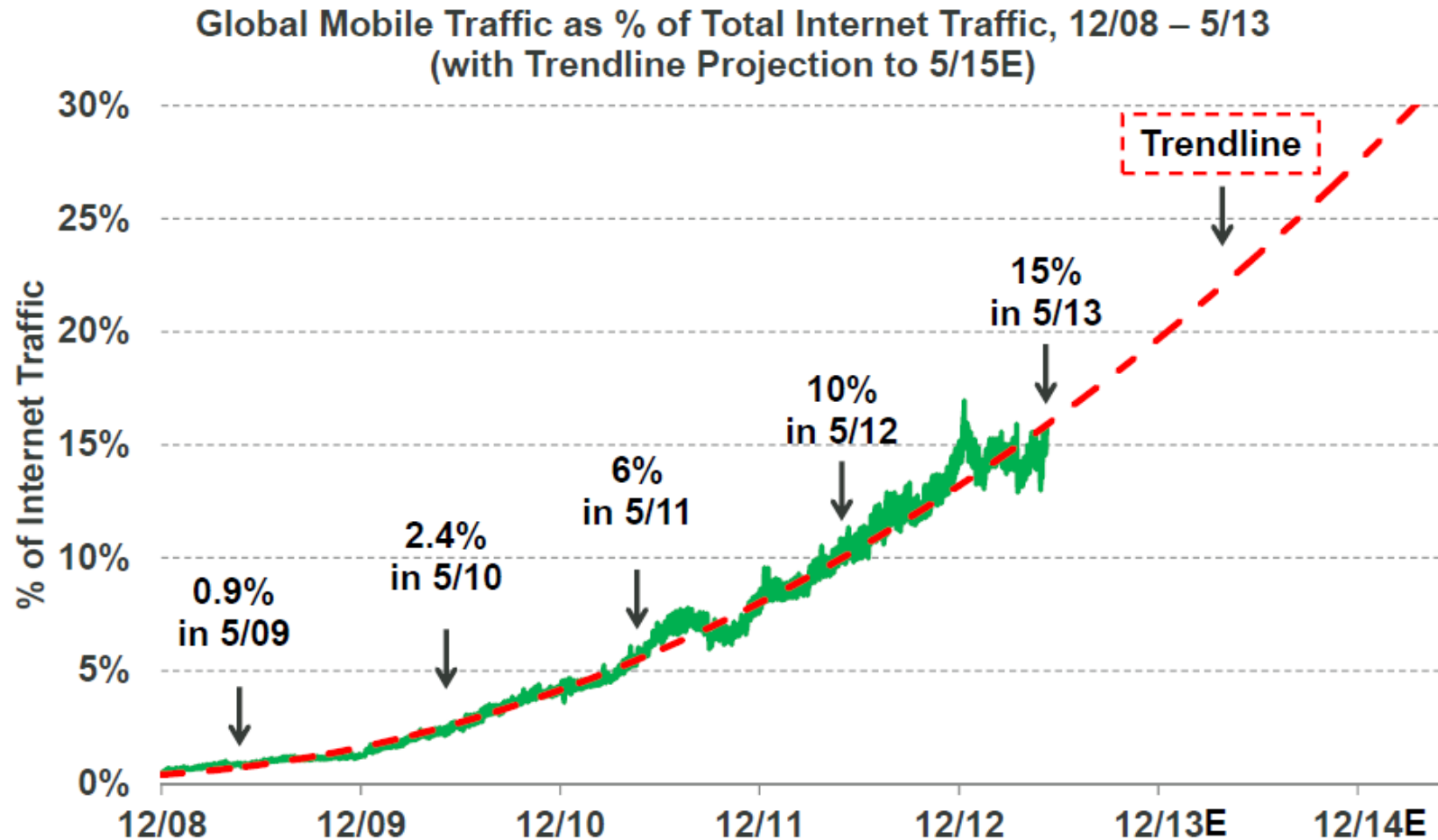


# Social Media – Facebook Leads, YouTube + Twitter + Google+ + Pinterest + Instagram + Tumblr Rising Fast



Source: KPCB

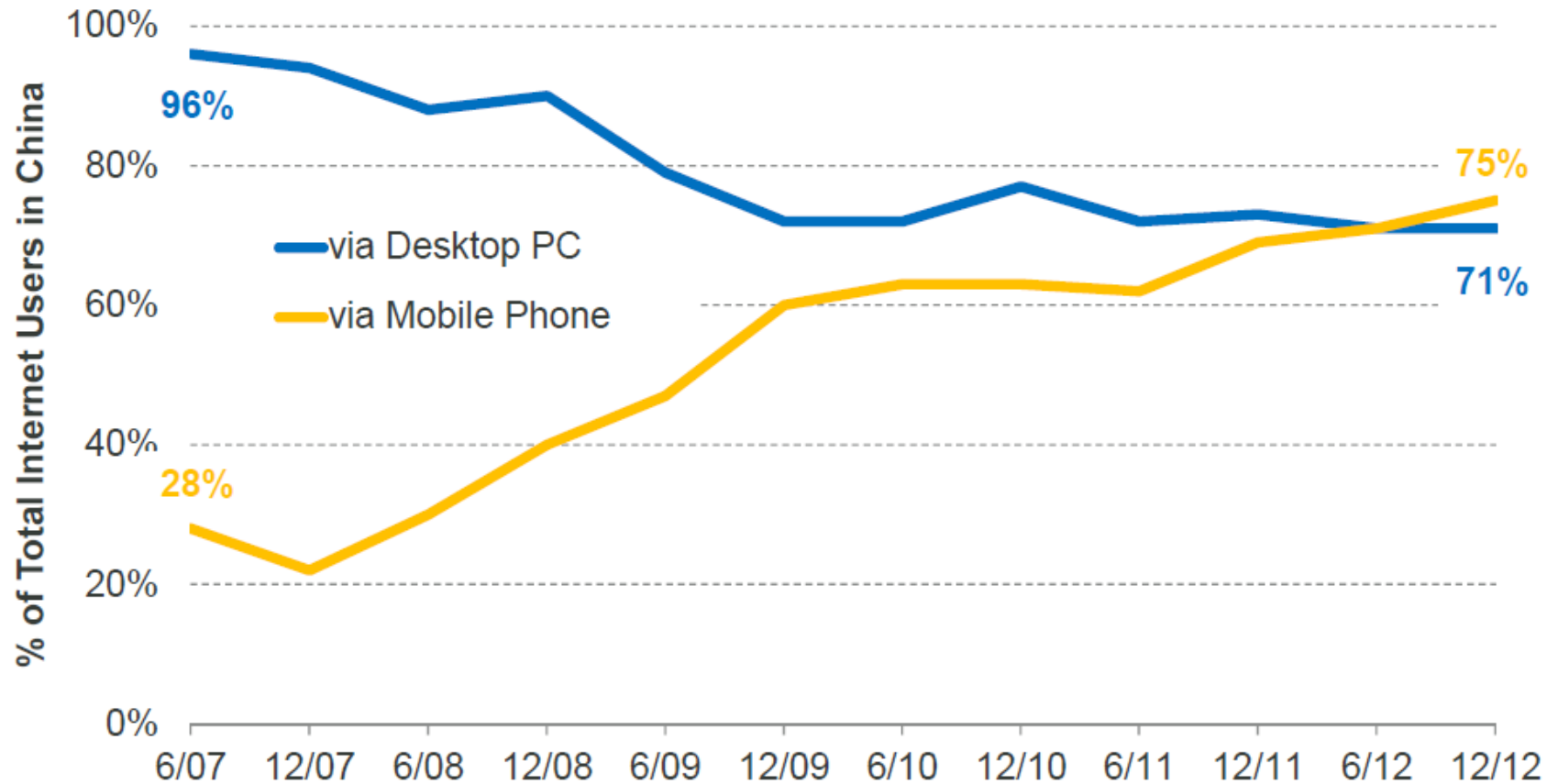
## Mobile Traffic as % of Global Internet Traffic = Growing 1.5x per Year & Likely to Maintain Trajectory or Accelerate



Source: KPCB

## China – Mobile Internet Access Surpassed PC, Q2:12

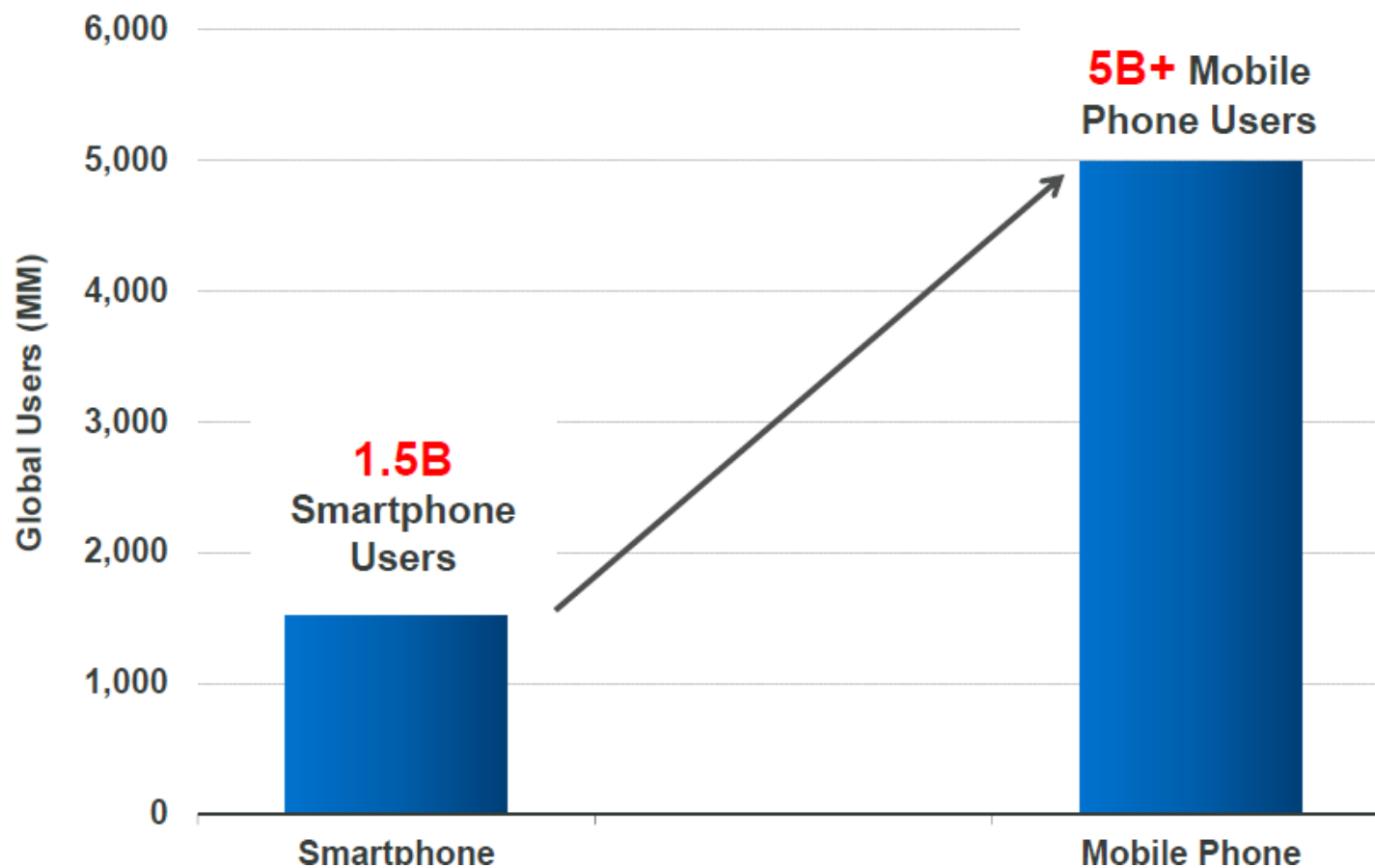
**% of Chinese Internet Users Accessing the Web  
via Desktop PCs vs. via Mobile Phones, 6/07 – 12/12**



Source: KPCB

# Smartphone Usage = Still Early Stage With Tremendous (3-4x) Upside

Global Smartphone vs. Mobile Phone Users, 2013E



Source: KPCB

# An Unusual Pattern...

***In Two Computing Cycles...***

***1) Smartphones***

***2) Tablets***

***...Entering a Third Cycle...***

***3) Wearables / Drivables /  
Flyables***



# Technology Cycles – Still Early Cycle on Smartphones + Tablets, Now Wearables Coming on Strong, Faster than Typical 10-Year Cycle

## Technology Cycles Have Tended to Last Ten Years

Mainframe  
Computing  
1960s



Mini  
Computing  
1970s



Personal  
Computing  
1980s



Desktop Internet  
Computing  
1990s



Mobile Internet  
Computing  
2000s



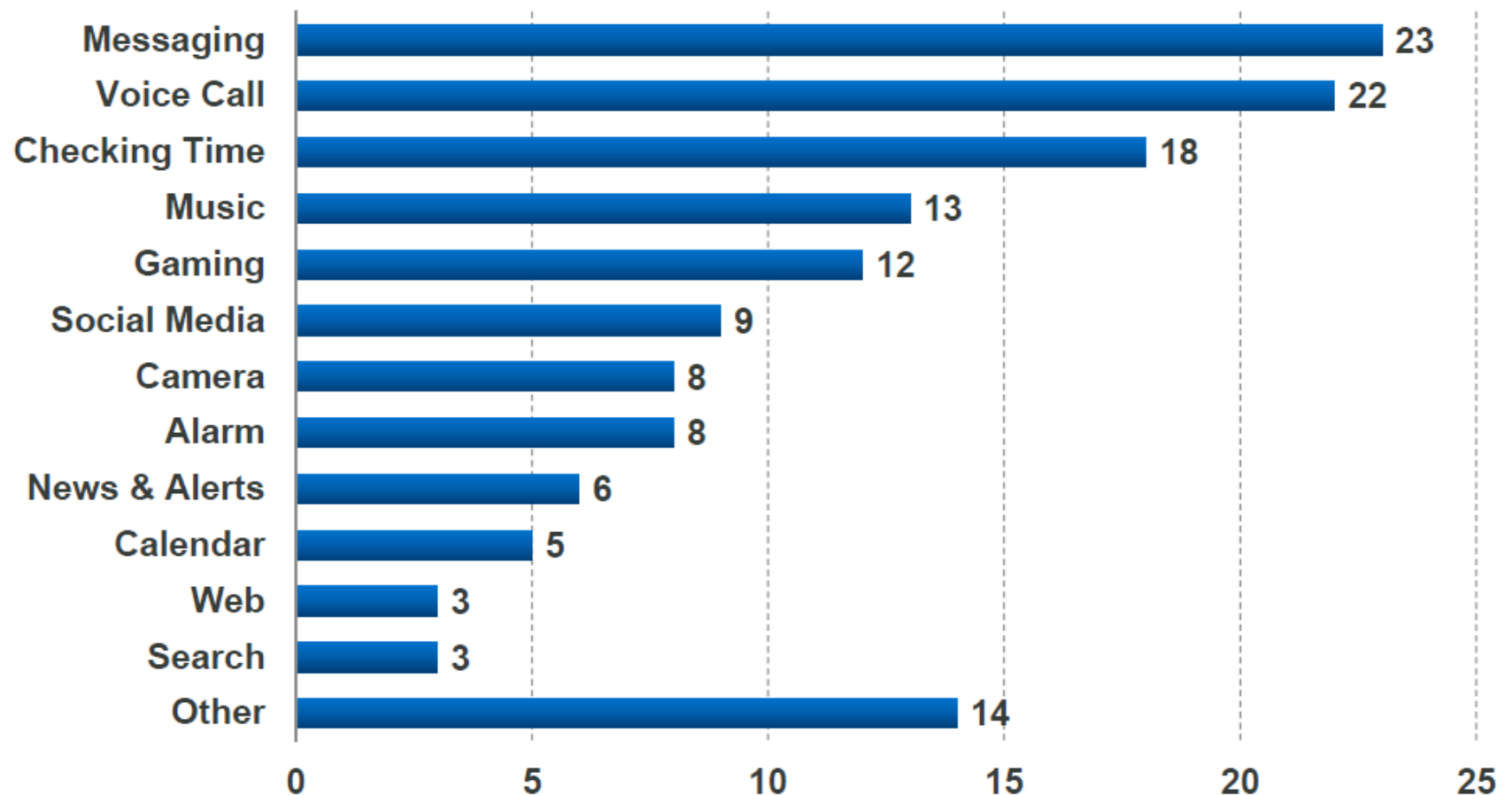
Wearable /  
Everywhere  
Computing  
2014+



Others?

# Smartphone Users Reach to Phone ~150x a Day... Could be Hands-Free with Wearables

# of Times Typical User Checks Phone per Day



Source: KPCB

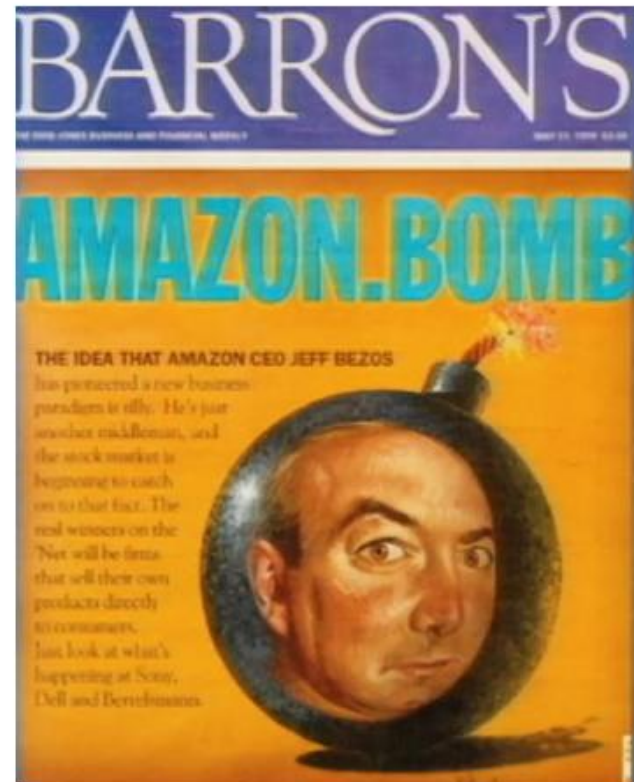
# Sensor-Enabled Wearable Attributes



# ...Some People Laughed at PC & Internet

***There is no reason  
anyone would want a  
computer in their home.***

- Ken Olsen  
(Founder)  
Digital Equipment  
1977



May 1999



# A Car or a Computer on Four Wheels?



Source: KPCB



# It's a Bird, It's a Plane, It's a Mini-Drone...

## *Use Cases of Low-Cost Drones*

### **Agriculture**

**GPS-Enabled Photos Help  
Pinpoint Potential Crop  
Damage Early On**



### **Sports / Entertainment**

**Unique Angle of View Provides  
Insights for Training +  
Broadcast Audience**



### **Public Safety / Disaster Relief\***

**Providing Aerial Video Coverage  
/ First-Aid / Other Supplies in  
Challenging Conditions**

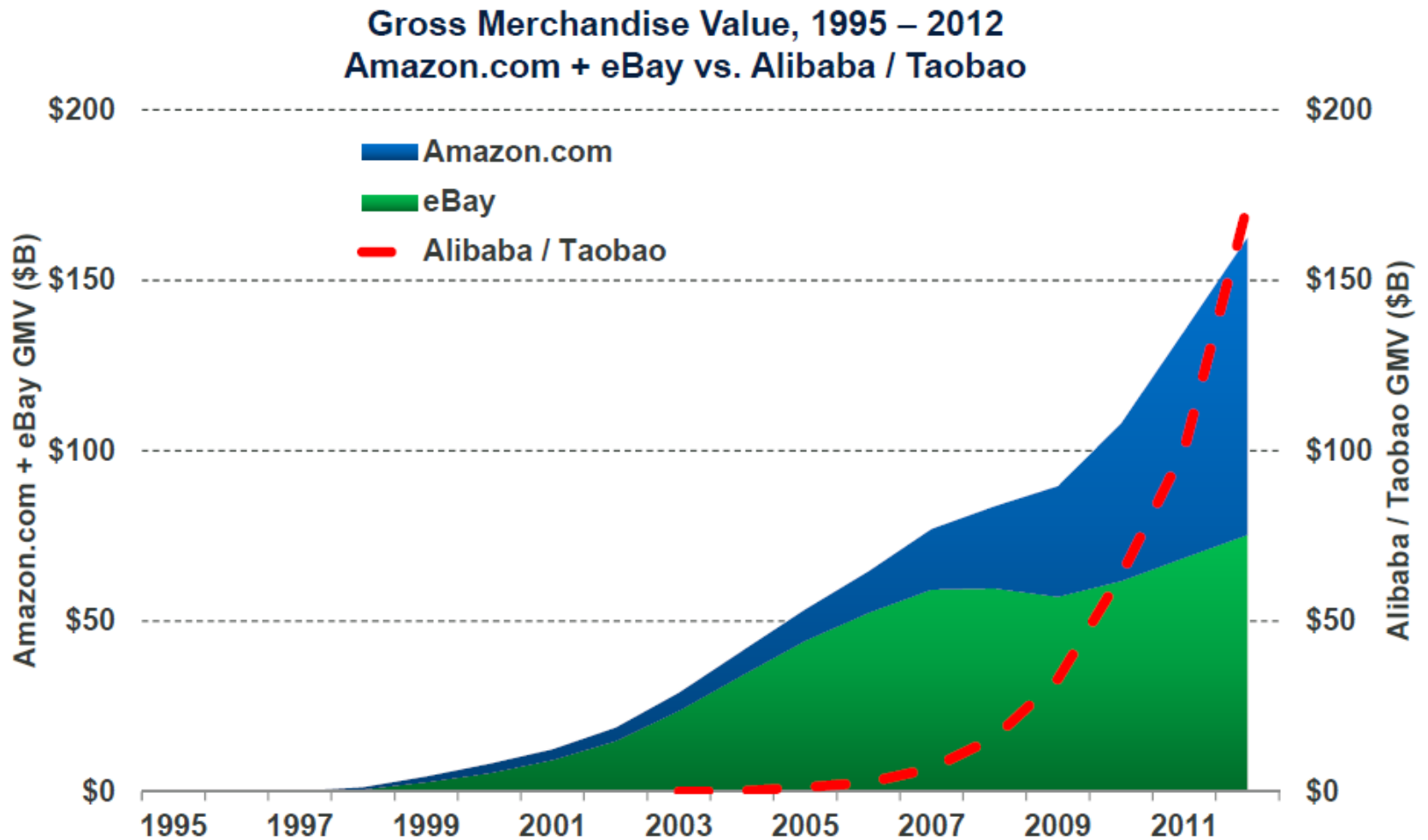


1



**Lots to learn from China!**

# Alibaba – Gross Merchandise Volume Surpassed Amazon.com + eBay, Q4:12



Source: KPCB

# JD.com (360buy) – Same Day Delivery with Real-Time Item Tracking on Map / Mobile...Often on Bicycle

Free\* Same-Day Delivery in 25+ Cities in China / Customer Can Track Package Location on Map / Mobile Devices and Contact Delivery Person in Real Time



Source: KPCB



# Taxi Apps\* – China – Push to Talk to Driver / Bid Extra to Increase Chance of Getting Car on Your Terms

## Push to Talk

Say current location and where you're going. Your voice message will be delivered instantly to all nearby available taxis



## Bid to Win

Increase your chance of hailing a cab during peak hours by offering extras tips up front (in addition to regular fare)



## Real Time Tracking

View your taxi's location in real-time, push to talk to the driver directly to coordinate pick-up



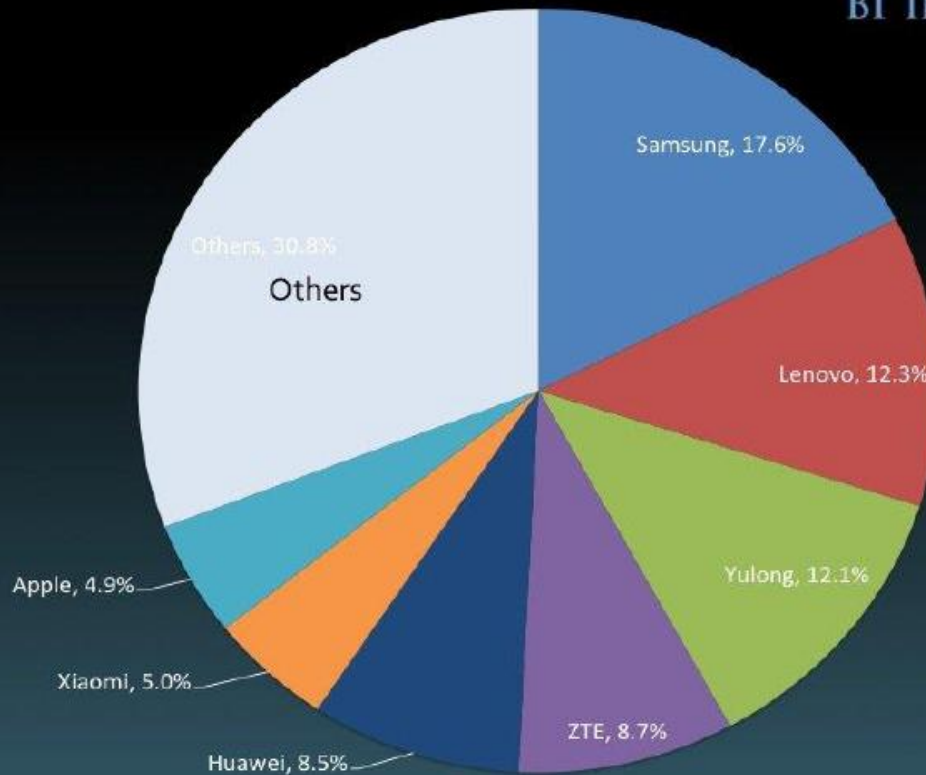


# Samsung and local manufacturers own China

## Chinese Smartphone Shipments Market Share

*By Vendor*

BI INTELLIGENCE



Source: Canalys, August 2013



2

**The future is already here**



## WeMo APP controls:





Use

**Turn on your lights  
when the sun sets**

by stong

4k



Use

**Text me if the door  
opens!**

by wemo

756

## WeMo APP controls:

WeMo Light Switch



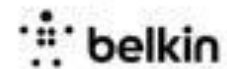
WeMo Switch



WeMo Motion



WeMo Insight Switch



# 56%

of broadband households now have at least one TV connected to the internet <sup>1</sup>

# 62%

watch Net-based video over a games console <sup>2</sup>





# TOP WAYS TO WATCH TV IN 2014



# APPLE TV

**Type:** Set-top box

**Price:** \$99.00

**Features:** Connects to any HDTV, syncs with other Apple products, Airplay



# XBOX ONE

**Type:** Set-top box & gaming unit

**Price:** \$499.99

**Features:** All-in-one entertainment console, voice control, ESPN partnership, single sign-on



# NETFLIX

**Type:** Mobile app /Internet TV service

**Price:** \$7.99 / month

**Features:** Low price point, robust content selection, available on any mobile device





# Vodafone TV

Our SuperNet offering to customers  
powered by our cable or fibre  
connections.

Only on the  
**SuperNet™**

Vodafone TV  
**up to 150  
Channels**  
(+ HD for no extra cost)

**Free**  
use of  
Vodafone TV  
**digital  
recorder**  
on selected plans

[Find out more](#)

**Free  
MY SKY HDi  
every month**

when you add SKY to an eligible  
Vodafone broadband plan

+

**No  
MY SKY HDi  
joining fee**

[Find out more](#)

Only on the  
**SuperNet™**

All on a 12 month term including SKY Basic



Red Home puts all the best stuff in one place. Your place

## TV viewing options with Vodafone

Pay TV	Free TV
<b>Vodafone TV with SKY</b> on Cable and Fibre	<b>Vodafone TV with Freeview HD</b> on Cable or Fibre
<b>SKY with Vodafone</b> with ADSL or VDSL broadband	





# Red Home. The best thing since colour TV.



- Check our **Vodafone TV** with
  - up to 150 channels,
  - HD at no extra cost, and
  - a HD digital recorder so you can record, pause and rewind live TV.
  - Freeview|HD or SKY
  - Free HD recorder on selected plans.



Vodafone TV  
with

freeview|HD



## Vodafone TV – Freeview|HD

- HD recorder free on selected plans.
- Up to 26 Freeview channels.
- Lifetime warranty on product while with Vodafone.
- 36 PPV channels with New release movies.
- Not offered by any other Telco.

## Vodafone TV with Sky



### Vodafone TV with SKY

- HD recorder free on selected plans
- HD is FREE and always on for programmes in HD.
- Some SD channels are better quality than SKY.
- 36 PPV channels with New Release movies.
- 5 additional channels not available on SKY TV, inc Discovery Travel & Living.

**Sky with  
Vodafone**



## **SKY through Vodafone is great value**

For TV you'll always want to watch, add SKY to your Vodafone standard xDSL broadband bill

**Free  
MY SKY HDi  
every month**

when you add SKY to an eligible  
Vodafone broadband plan



**No  
MY SKY HDi  
joining fee**

**Find out more**

**Only on the  
SuperNet™**

All on a 12 month term including SKY Basic

# Availability

Connection	Fibre to the home (UFB)	Cable network (HFC)	ADSL & VDSL
Product	Vodafone TV	Vodafone TV	SKY With Vodafone
Location	Available in parts of Auckland & Wellington, Palmerston North & Dunedin	Available in Kapiti, Wellington & Christchurch	SKY TV with Vodafone is available to our Red Home customers if they have an ADSL or VDSL connection with us.







3

**Come and say hello to the team**

# Strike gold with the new **Samsung GALAXY S5**

Buy it and be in to win **\$100,000** worth of gold plus daily prizes in Vodafone's great GALAXY Gold Rush.

**Buy now**

Only on the  
**SuperNet™**





## **'SeniorNet Scan and Save' Summer Competition!**

SeniorNet & Vodafone New Zealand Ltd.

Great news! SeniorNet members, for March and April 2014 you can scan your current Landline and Broadband bill (it does not have to be a Vodafone bill, other providers' are welcomed) and send it to Vodafone for a no obligation review of your bill. The Vodafone team will then be in touch to provide a recommendation of ways you can save money!





Mobile



Fixed Line



Broadband Internet



Pay TV





**Thank you**