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# DAB : Technology or Service ?

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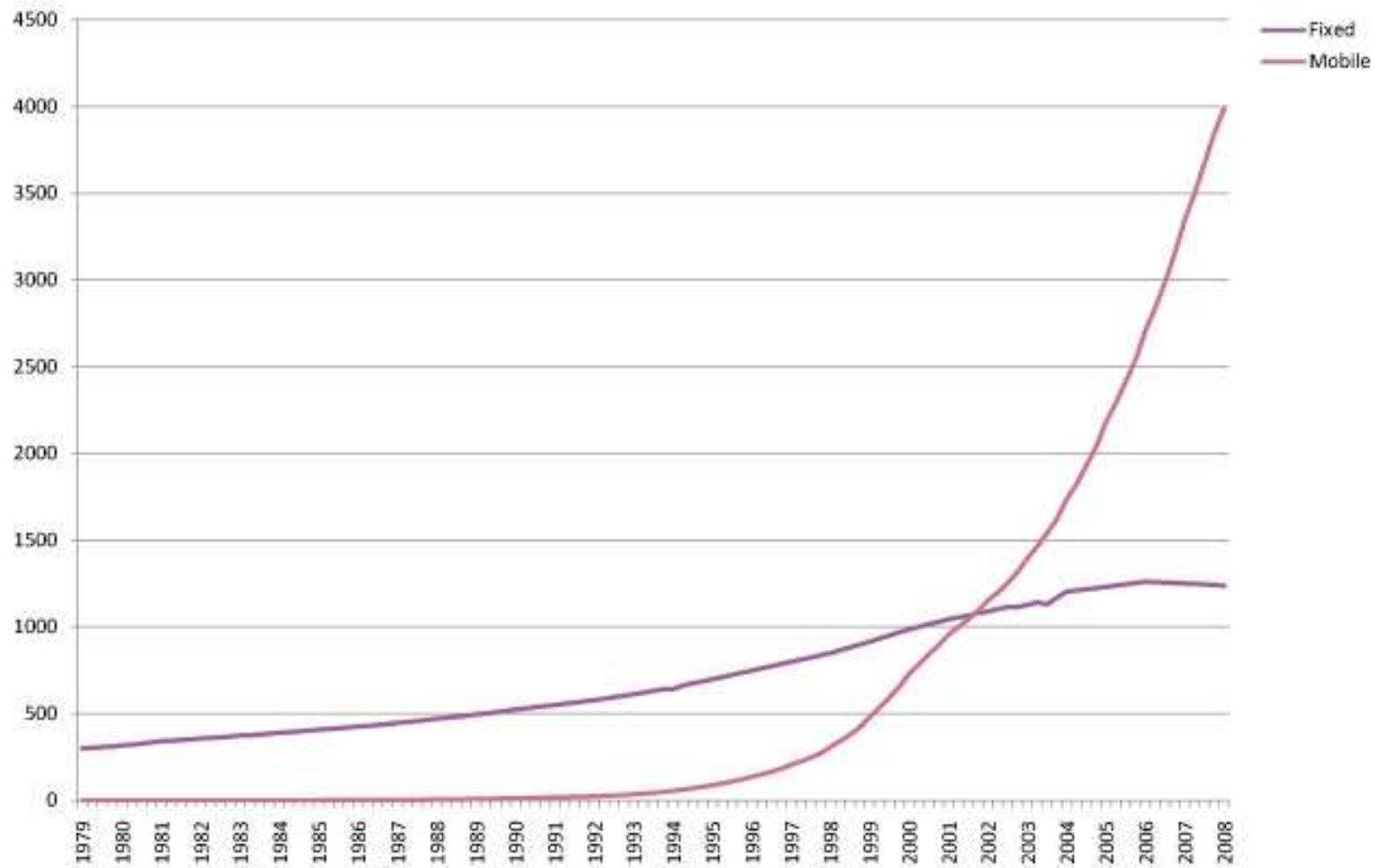
A *Telefonica* company

# Agenda

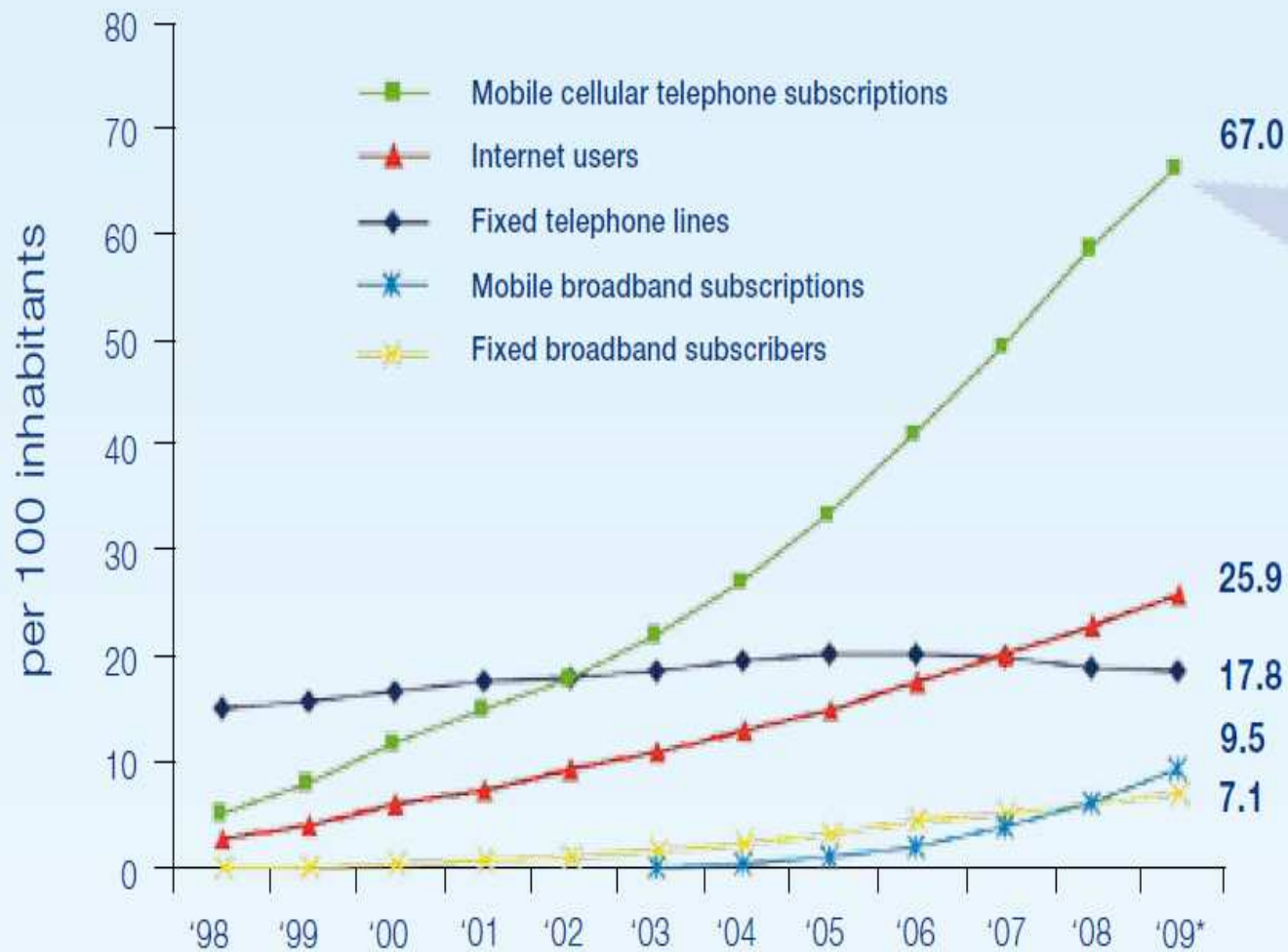
1. International reach of ICT
2. A Digital connected world
3. Human factors
4. Applications anywhere anytime
5. Innovation everywhere



## Global Connection Base (m), Mobile vs Fixed, 1979-2008



## A decade of ICT growth driven by mobile technologies

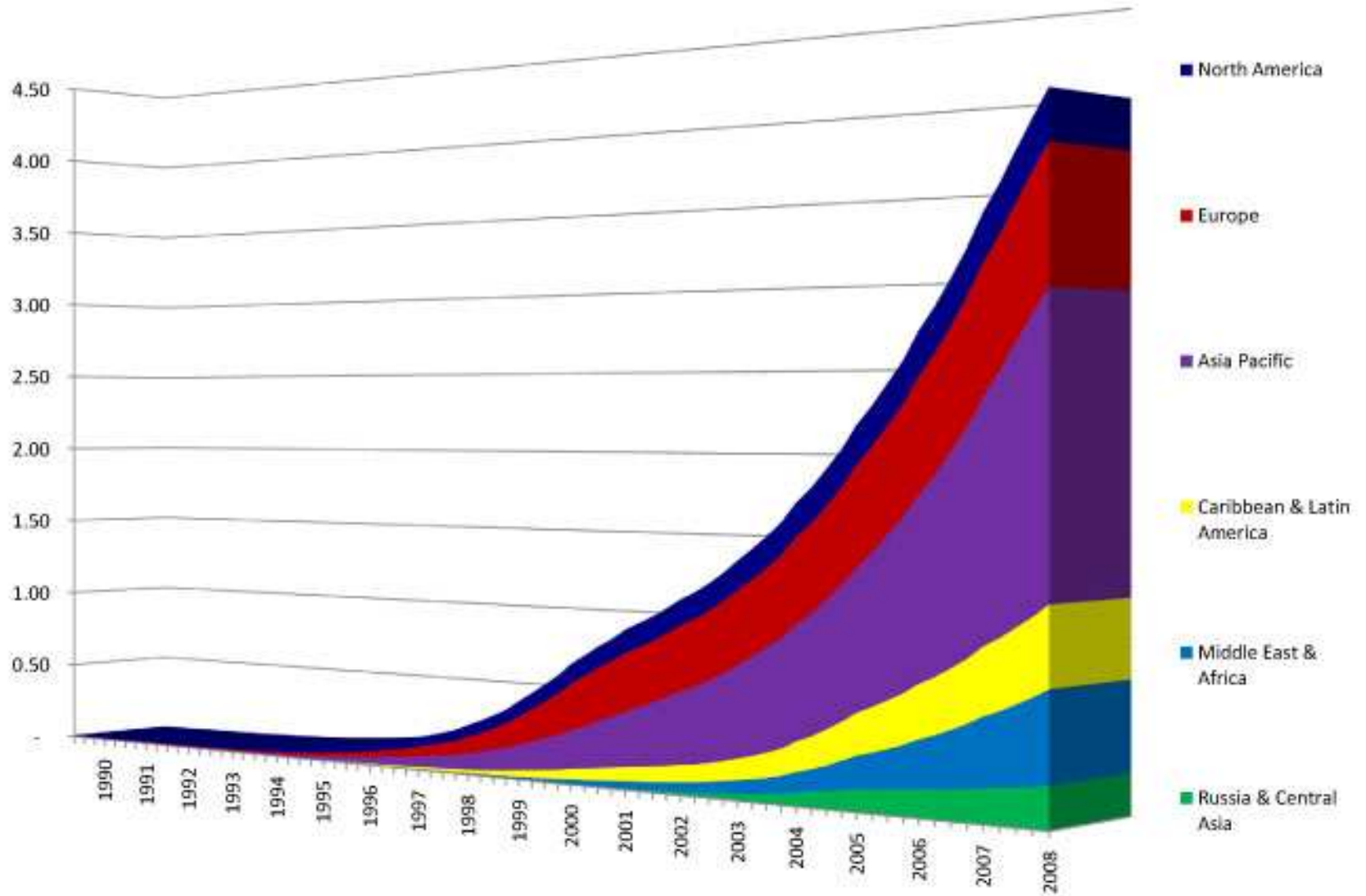


An estimated 4.6 bn subscriptions globally by the end of 2009

Source: ITU World Telecommunication/ICT Indicators Database.

\* Estimates.

## Global Mobile Connection Base (bn) by Region, 1990-2008



# We all live in a 'Connected World'



Users are rapidly adopting new **habits**



More **powerful** and **enabled devices** will be available



Digital **contents** will continue **growing** and will be fully **stored**



New **services** will **flourish**



# New services coming...



## Today



- Internet access
- Mobile data
- Text Messaging



- Instant messaging
- VoIP
- Podcasting



- IPTV
- Internet TV



- Hosting

## Tomorrow



- Ultra Broadband Access (100Mb/s)
- High-speed Mobile Data
- Data Fuel Stations



- HD Videocalls
- HD Telepresence



- Personal TV
- HD TV, 3D TV
- Augmented Reality



- Virtualization
- Web mashing, Data Mining

# Handsets have changed...







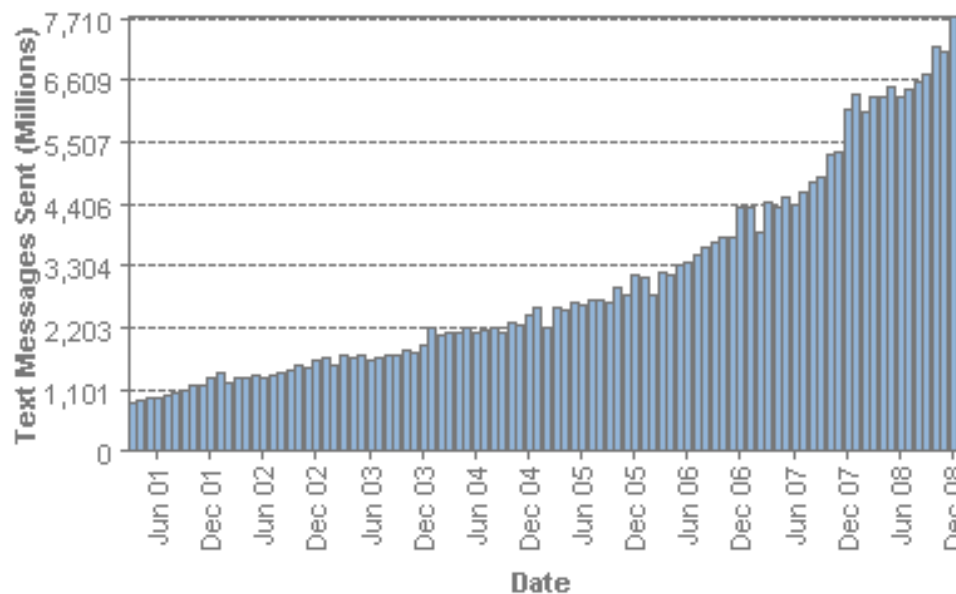
# Mobile Usage & SMS (UK Data)

There is now **132%** mobile penetration in the UK – around **80.3million** handsets \*

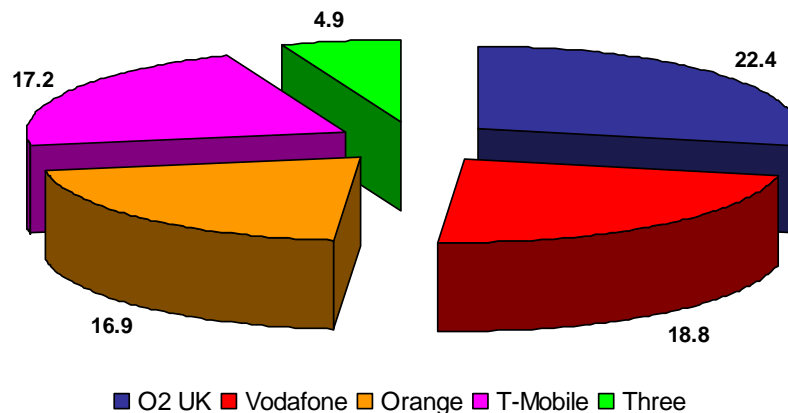
**104 billion SMS** messages sent in 2009 – compared to **1/56.9 billion** in 1999/2008 \*

**Average 4 SMS** messages per person sent every day in the UK in 2009

There has **never** been a better to time for you to engage with your customers via their mobile!



2009 connections: 80.3 Million



\* source: OFCOM Aug 2010 / MDA

## What is so great about a 'text'?

- You can almost guarantee a text will be read by the recipient
  - *How many emails are unread in your inbox right now?*
  - SMS is the springboard to engaging interactivity
- SMS is the quickest and most efficient way in getting important messages
- More *retailers* are using SMS than ever before (Ocado, Tesco, Argos, DSGi, Selfridges, M&S, Next....)
- *Listener engagement through messaging as well as voice ?*



# UK Mobile Usage & Mobile Internet (GPRS & 3G)



15% MBB and 23% smartphone data access in 2009 \*

There are around 25.5 million 3G handsets in the UK \*

Brands can **no longer** afford to treat mobile browsing customers as an *optional extra* when defining their web strategy

iPhone has changed the way in which people use the mobile internet.

Smartphone growth is exploding and internet access will **overtake** PC usage



\* sources: Ofcom – Aug 2010

# Driving innovative new services

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## Connected Roads



## Connected Homes



## Connected Cars



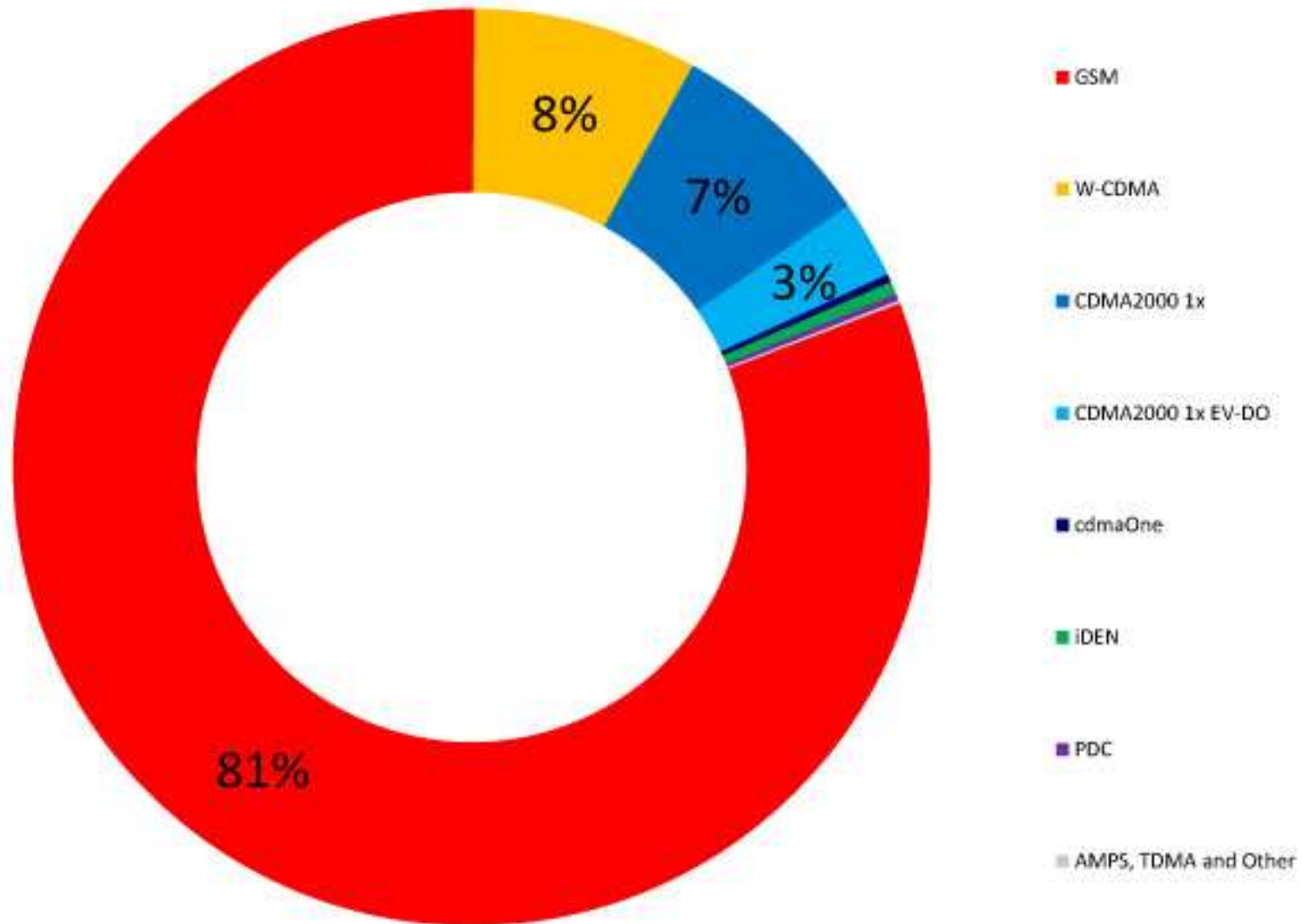
## Connected Learning



# Conclusions

1. The only constant is change
2. Ease of use / Human factors remain vital
3. Wireless and Internet solutions will both have a growing role - DAB content can be global too .
4. Smarter homes, smarter cities
5. By 2020 estimates vary - between 20 and 50 Billion Internet capable devices

## Market Share of Global Connection Base by Technology, 2008



## Rolling Annual Mobile Connection Growth by Region, 1998-2008

