Brian Solis

DISRUPTIVE TECHNOLOGY TRENDS 2015 - 2016

principal analyst & author

@briansolis

ALTIMETER®

The Future is Already Here

The Future is not What We Were Told It Would Be

We Did Finally Get a Hoverboard...Prototype

Our Future Revolves Around the EGOsystem

Social Media 1.0 is Dead

Social Media becomes part of a digitally transformed ecosystem

Real-time and content marketing becomes more sophisticated and portable

CRIME SCENE DO NOT CROSS

Social becomes key hub for shaping customer experiences

Social connects the Zero Moment of Truth and the Ultimate Moment of Truth

The Future of Search and SEM Also Lies Outside of Google

More than 88% of consumers are influenced by other consumers' online comments.

Source: Econsultancy.com

amazon.com

You Tube

(Pinterest)

Net US Mobile Internet Search Ad Revenues, by Company, 2012-2016
% change and % of total mobile search ad spending

	2012	2013	2014	2015	201
% change					
Yelp	-	311.0%	136.0%	83.8%	61.4
Google	198.2%	82.5%	75.0%	44.1%	39.5
YP	170.0%	50.0%	35.0%	25.0%	20.0
Other	343.7%	839.9%	117.4%	59.1%	40.8
Total	201.7%	120.8%	82.3%	47.7%	39.3
% of total mobile search ad spending					
Google	82.8%	68.5%	65.7%	64.1%	64.2
YP	11.2%	7.6%	5.7%	4.8%	4.1
Yelp	0.5%	1.0%	1.3%	1.6%	1.5
Other	5.4%	22.9%	27.3%	29.4%	29.7

Note: includes advertising on search engines, search applications and carrier portals; ad spending on tablets is included; excludes SMS, MMS an P2P messaging-based advertising; numbers may not add up to total due t rounding; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites
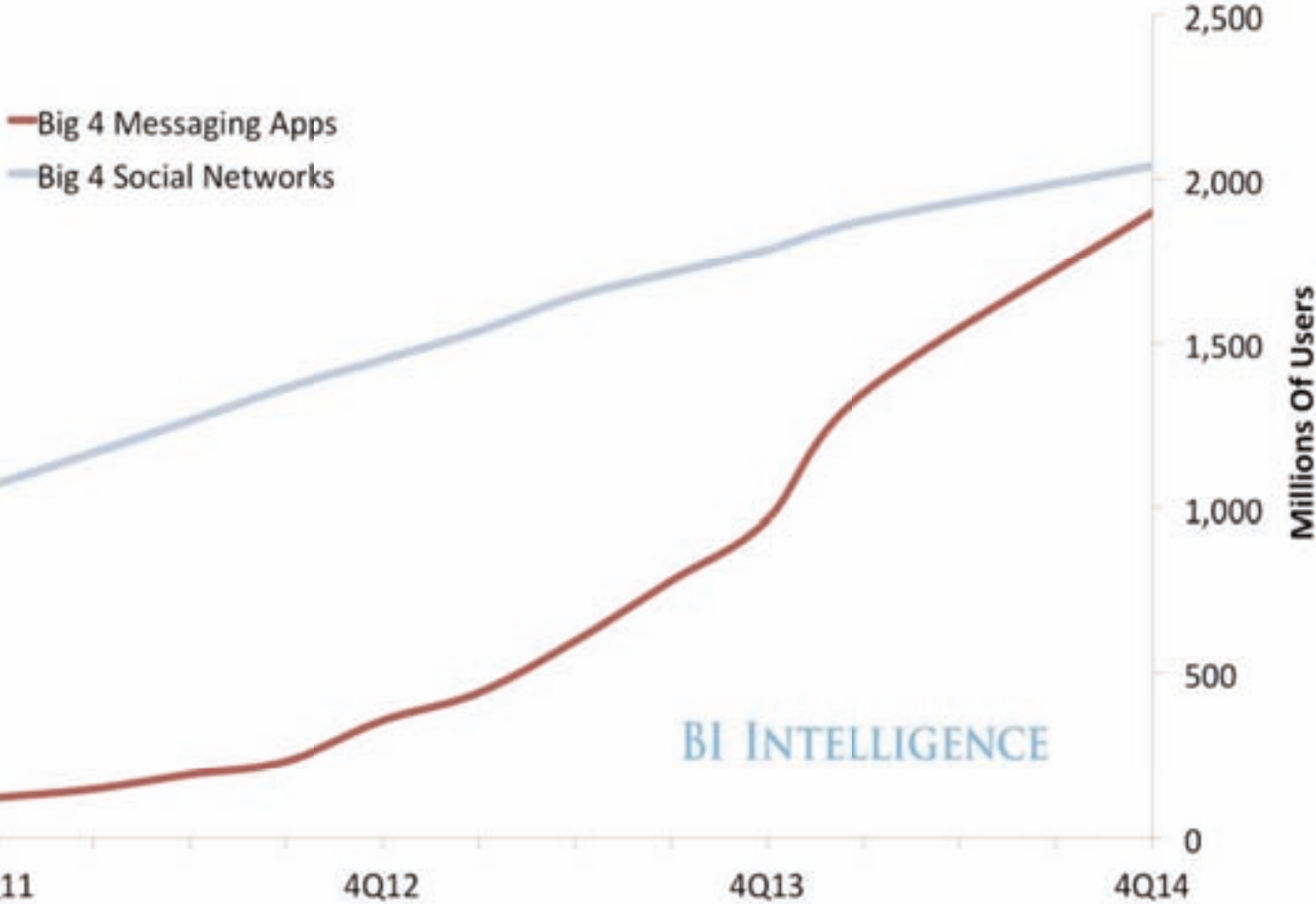Source: company reports; eMarketer, June 2014

173935   www.**eMarketer.**c
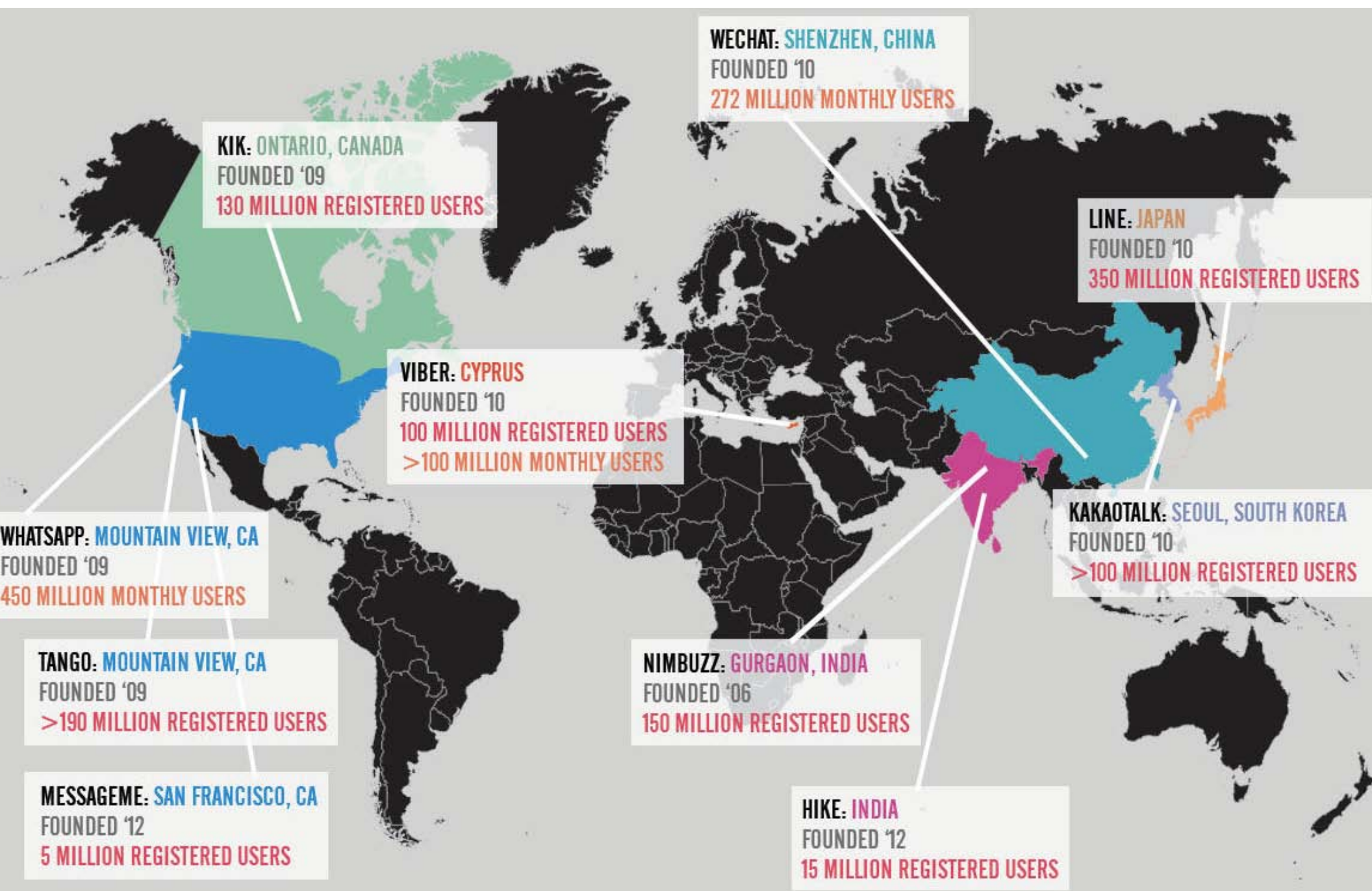
Messaging Apps are the New Social Media

Tech 📊 Chart of the Day

Messaging Apps Are On The Brink Of Overtaking Social Networks In User Numbers*

— Big 4 Messaging Apps
— Big 4 Social Networks

Millions Of Users

2,500
2,000
1,500
1,000
500
0

4Q11   4Q12   4Q13   4Q14

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*Messaging apps: WhatsApp, Messenger, LINE, WeChat. Social apps: Facebook, Twitter, LinkedIn, Instagram

BUSINESS INSIDER

readwrite

WECHAT: SHENZHEN, CHINA
FOUNDED '10
272 MILLION MONTHLY USERS

KIK: ONTARIO, CANADA
FOUNDED '09
130 MILLION REGISTERED USERS

LINE: JAPAN
FOUNDED '10
350 MILLION REGISTERED USERS

VIBER: CYPRUS
FOUNDED '10
100 MILLION REGISTERED USERS
>100 MILLION MONTHLY USERS

WHATSAPP: MOUNTAIN VIEW, CA
FOUNDED '09
450 MILLION MONTHLY USERS

KAKAOTALK: SEOUL, SOUTH KOREA
FOUNDED '10
>100 MILLION REGISTERED USERS

TANGO: MOUNTAIN VIEW, CA
FOUNDED '09
>190 MILLION REGISTERED USERS

NIMBUZZ: GURGAON, INDIA
FOUNDED '06
150 MILLION REGISTERED USERS

MESSAGEME: SAN FRANCISCO, CA
FOUNDED '12
5 MILLION REGISTERED USERS

HIKE: INDIA
FOUNDED '12
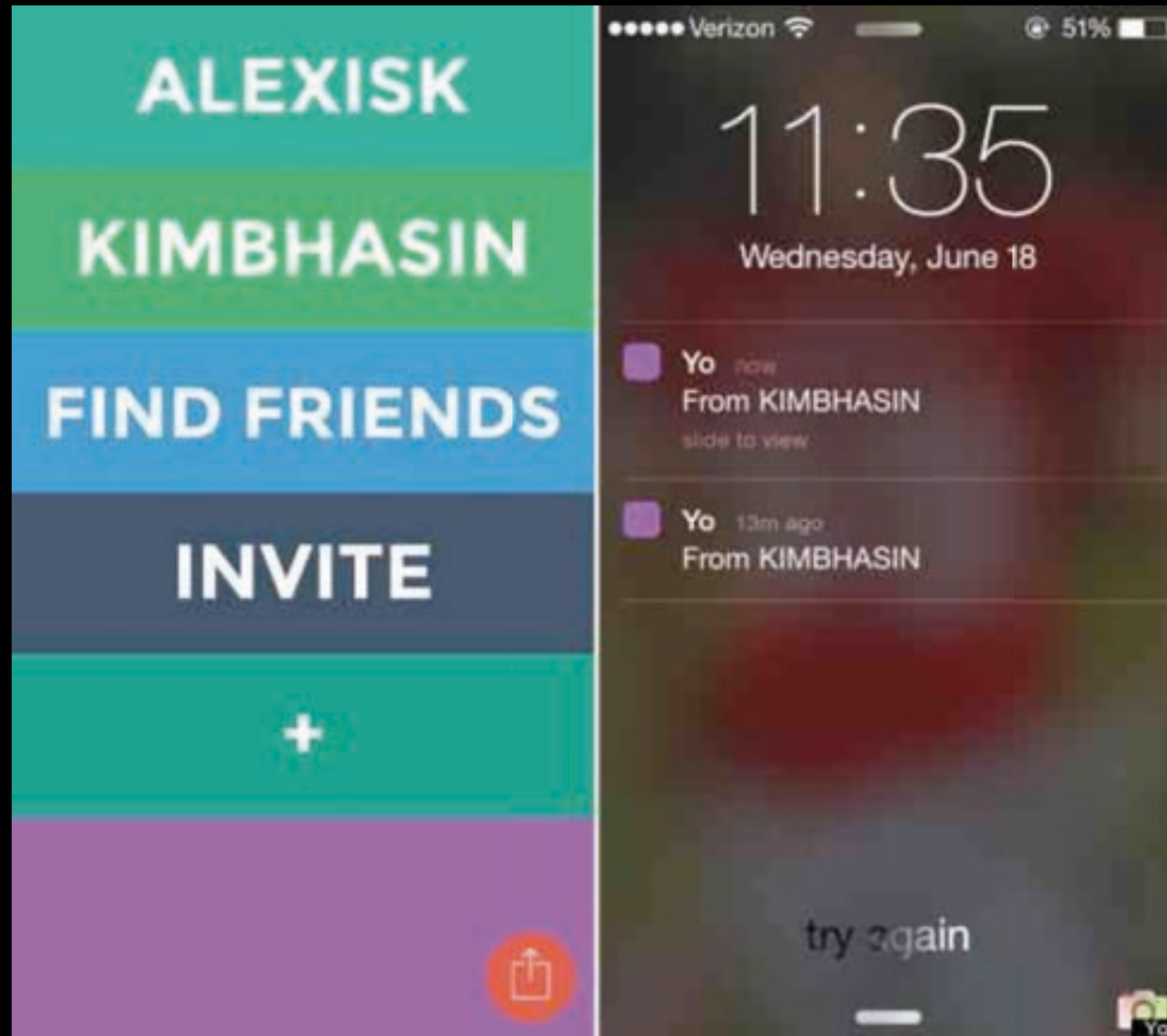15 MILLION REGISTERED USERS

Asia and Other Foreign Competitors Will Compete to Gain Share and Push Messaging Forward
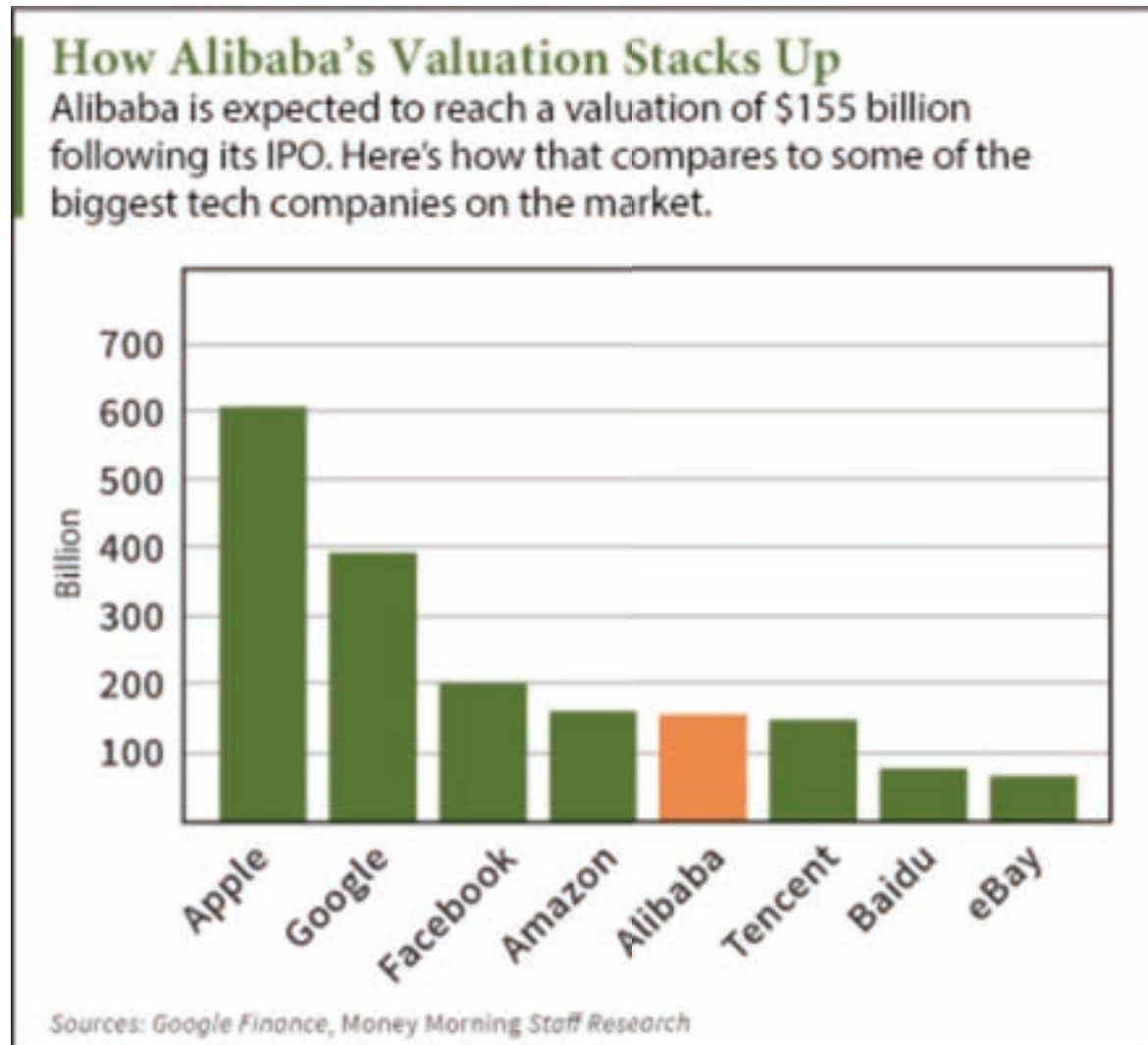
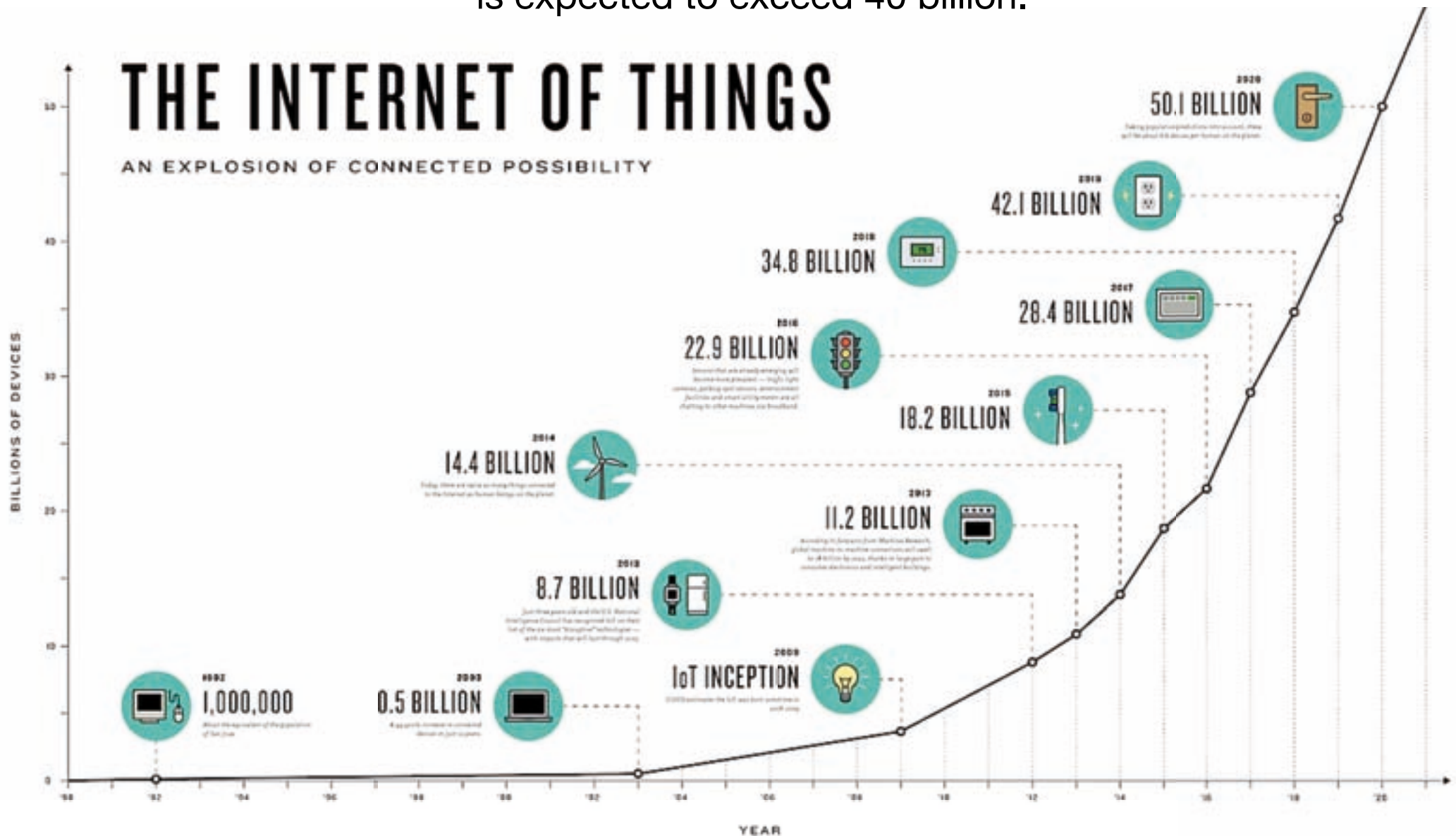# Notification Windows Introduce a Thin Layer for Rapid Engagement. Redefines Future of "Apps"

Chinese Innovation is Going to Disrupt the US from the Outside In and the Inside Out

How Alibaba's Valuation Stacks Up
Alibaba is expected to reach a valuation of $155 billion following its IPO. Here's how that compares to some of the biggest tech companies on the market.

Billion

700
600
500
400
300
200
100

Apple Google Facebook Amazon Alibaba Tencent Baidu eBay

Sources: Google Finance, Money Morning Staff Research

The Internet of Things is a Hot and Beautiful Mess Until It Becomes the Internet of Everything

By 2020, the number of devices connected to the Internet
is expected to exceed 40 billion.

THE INTERNET OF THINGS

AN EXPLOSION OF CONNECTED POSSIBILITY

BILLIONS OF DEVICES (vertical axis)

- **1992** — 1,000,000
- **2003** — 0.5 BILLION
- **2009** — IoT INCEPTION
- **2012** — 8.7 BILLION
- **2013** — 11.2 BILLION
- **2014** — 14.4 BILLION
- **2015** — 18.2 BILLION
- **2016** — 22.9 BILLION
- **2017** — 28.4 BILLION
- **2018** — 34.8 BILLION
- **2019** — 42.1 BILLION
- **2020** — 50.1 BILLION

YEAR (horizontal axis)

Wearables Will Struggle to Find Their Place in Everyday Life. They Still Need a Killer App.

Virtual Reality Experiments with *Killer* Apps for Consumer and Vertical Markets

Focus on the Kids! Generation Z is Mobile First and Mobile Only and They're Nothing Like Millennials

Don't treat them like Millennials

Gen Z	Millennials
Tech Innate: 5 Screens	Tech Savvy: 2 Screens
Think in 4D	Think in 3D
Judiciously Share (GeoLoco Off)	Radical Transparency: Share All
Active Volunteers	Slacktivists
Blended (race & gender)	Multi-cultural
Togetherness	Tolerance
Mature	Immature
Communicate with Images	Communicate with Text
Make Stuff	Share Stuff
Have Humility	Have Low Confidence
Future Focused	Now Focused
Realists	Optimists
Want to Work for Success	Want to be Discovered
Collective Conscious	Team Orientation

Theawl.cor

Youtube, Vine, etc., Represent "A" New Hollywood
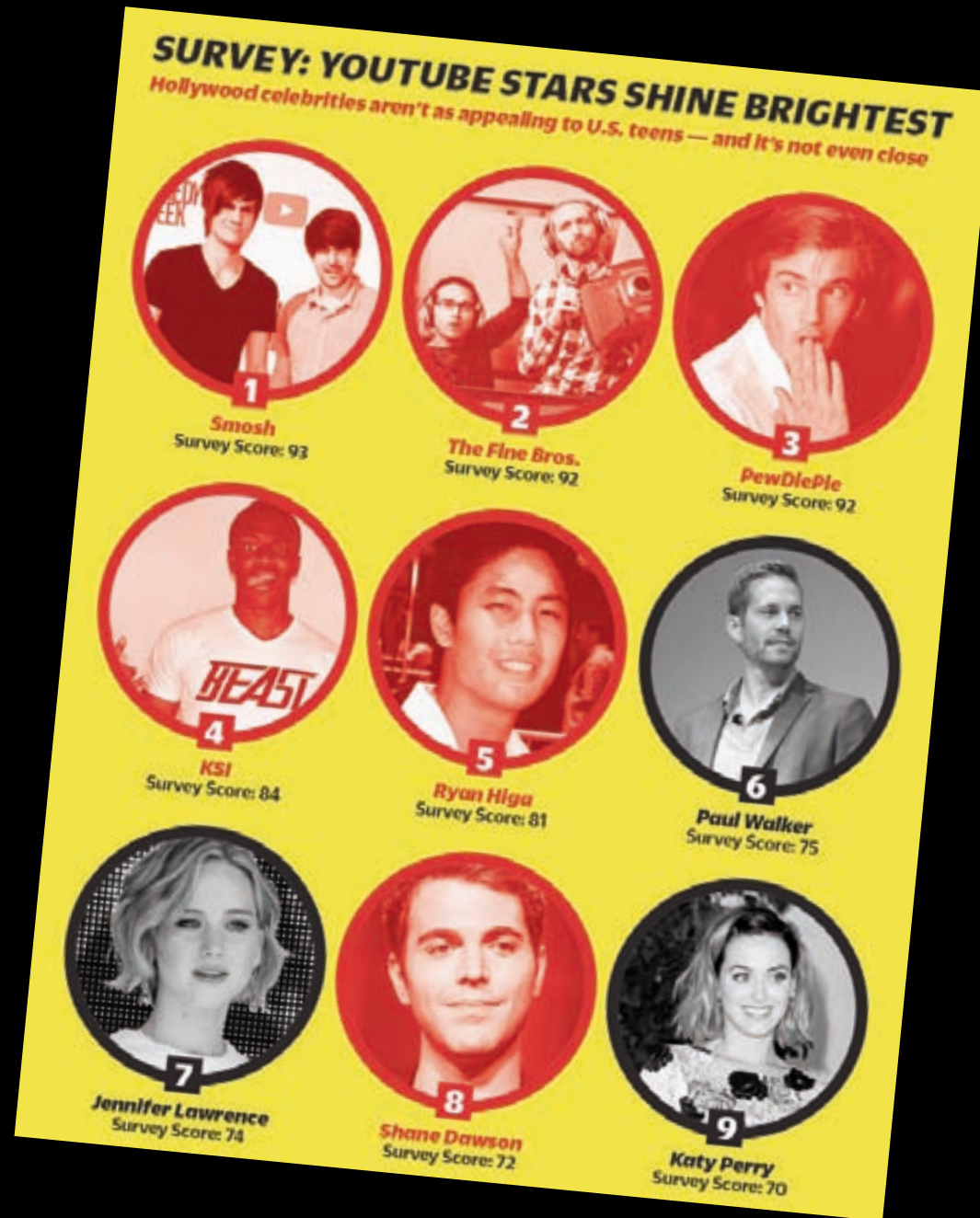
Cyber Security Becomes Paramount to Prevent the Next #Sonygate

Some Companies are Still Greedy and Believe the Internet Should Not Be Open for the Sake of Profitability. This Will Impede Innovation.

Decoding the net neutrality debate

An analysis of media, public comment and advocacy on open Internet

Music Streaming Will Continue to Undermine the Music Business and Artistry. Artists Fight Back.

Brian Solis ✓
@briansolis

Pharrell Williams earned less than $3,000 for 43 million aux.tv/2014/12/pharre ...

RETWEETS	FAVORITES
38	35

Here's Why Taylor Swift Dropped Spotify: $4 Million From YouTube

Taylor Swift, Garth Brooks and other artists lead the fight against Spotify

NEWS   CULTURE   BOOKS & FICTION   SCIENCE & TECH   BUSINESS   HUMOR   MAGAZINE

DECEMBER 26, 2014

WHY AIRLINES WANT TO MAKE YOU SUFFER

BY TIM WU

Wall Street analysts, however, accused JetBlue of being "overly brand-conscious and customer-focussed." In November, the airline, under new management, announced that it would follow United, Delta, and the other major carriers by cramming more seats into economy, shrinking leg room, and charging a range of new fees for things like bags and WiFi.

Crowd Capitalization Accelerates Disruption… Everywhere.

SKULLY AR-1 The World's Smartest Motorcycle Helmet

Story   Updates 6   Comments 262   Funders 1,590   Gallery 6

SKULLY AR-1: Rebel Innovation

$2,000,016 USD
RAISED OF $250,000 GOAL

0:00 / 2:23

Help fund the next wave of scientific research

Start an Experiment | Browse Projects

"This solution helps close the gap for potential and promising, but unfunded projects."
Bill Gates

Bitcoin is Widely Known, Though Its Market Cap is Down, The Bitcoin Stack Will Revive the Movement

Market Capitalization
Source: blockchain.info

The Blockchain Application Stack

App App App App App

Commercial APIs | Open Source APIs

Decentralized Protocol | Decentralized Protocol | Decentralized Protocol

Shared Protocol Layer

Overlay Network | Overlay Network

The Bitcoin Blockchain

Shared Data Layer

Joel Monegro
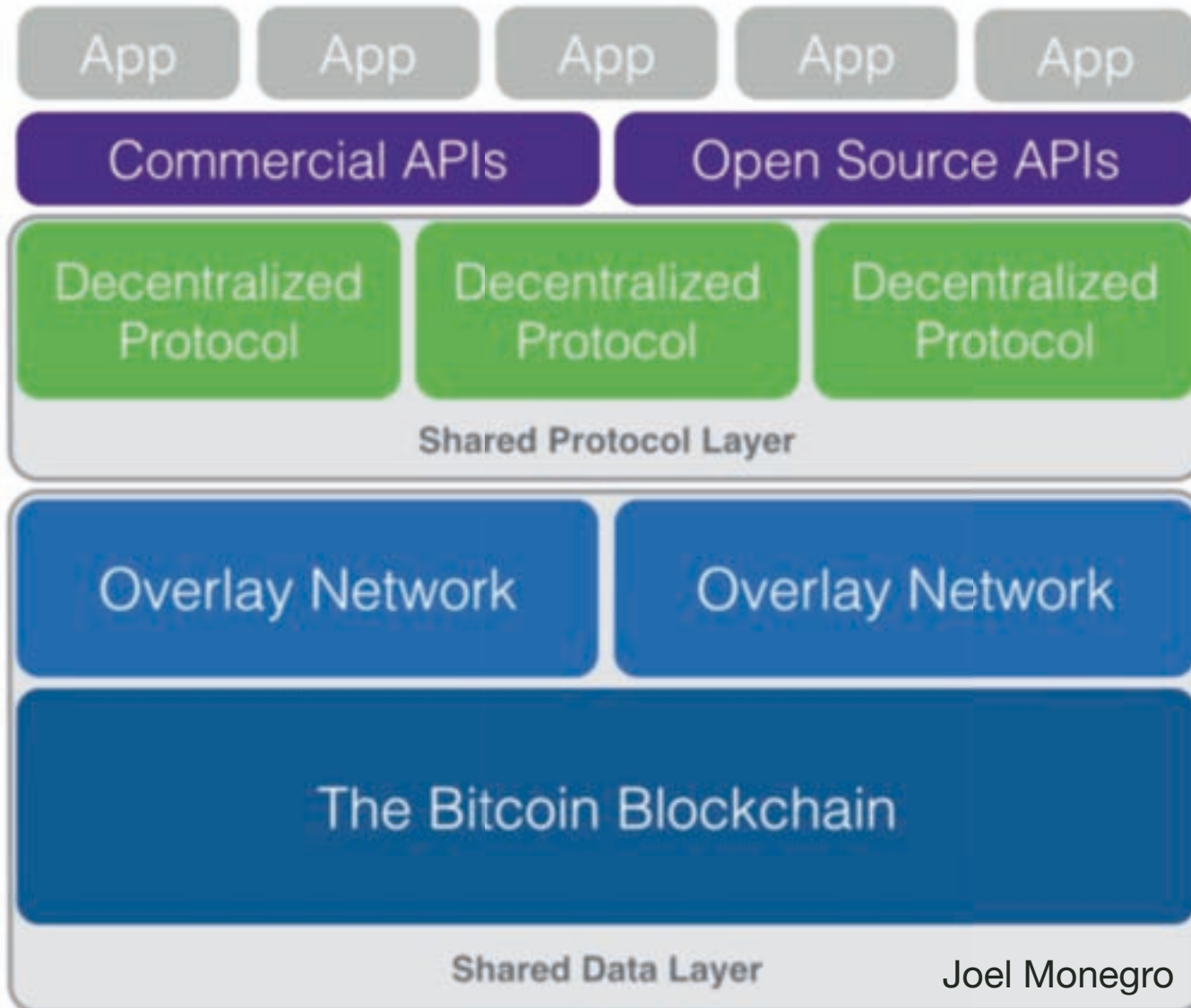
Mobile Payments Early Today, but Will Soon Skyrocket

FORECAST: US Mobile In-Store Payment Volume

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We Are Here

CAGR = 154%

$189

$1.8

Billions Of Dollars

$200
$180
$160
$140
$120
$100
$80
$60
$40
$20
$0

2013   2014E   2015E   2016E   2017E   2018E

Source: BI Intelligence
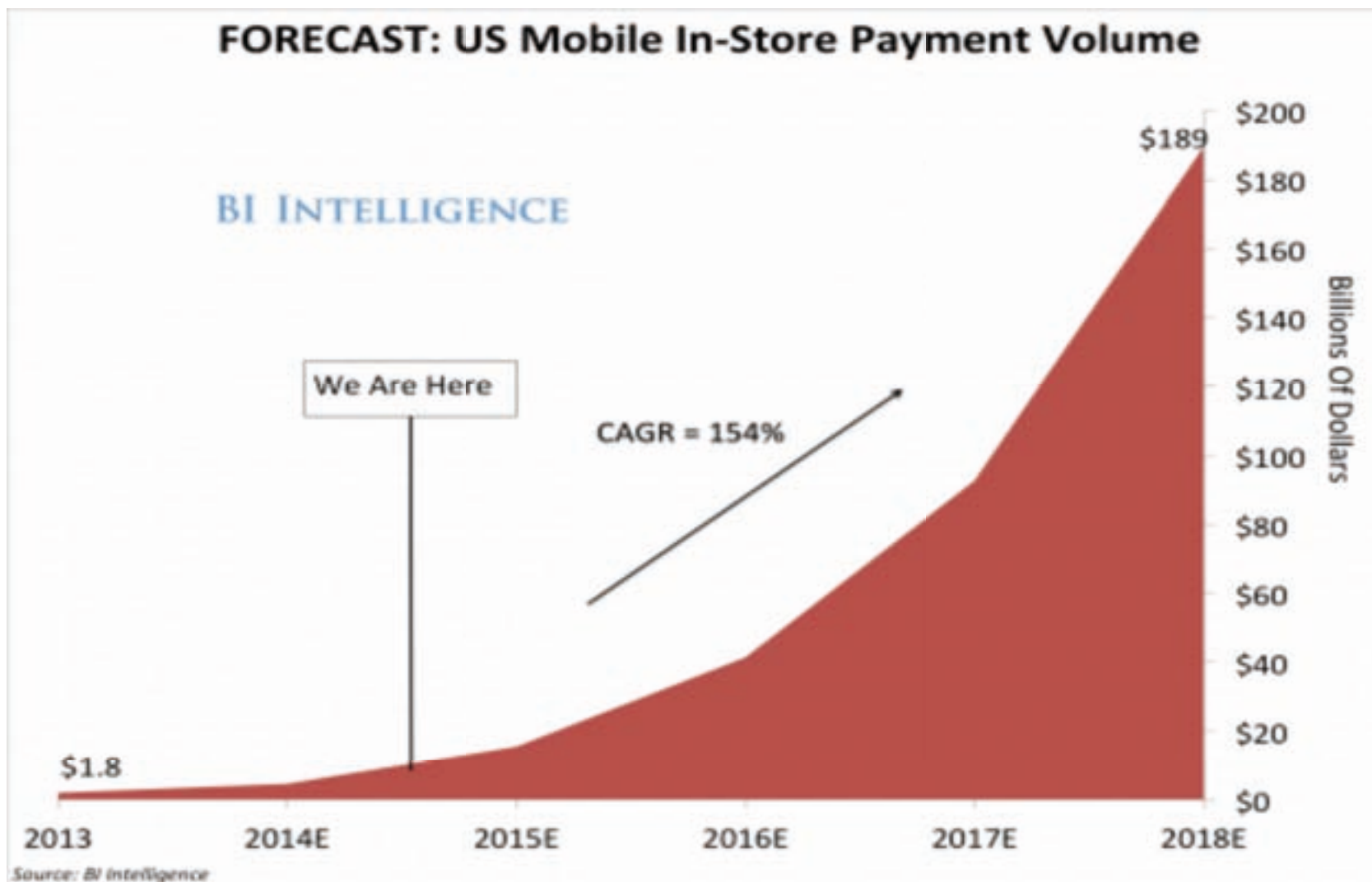
In late 2013, just 6% of US adults said they had made a payment in a store by scanning or tapping their smartphone at a payment terminal. It will go up to 8% this year. Apple's introduction of the Apple Pay will be the key factor that will drive this percentage up.

Mobile Payments are Already Gaining Traction

Nearly **15%** of Starbucks customers already pay with their phones

60% of consumers use their smartphones to pay because of loyalty benefits.

The Sharing Economy is Really About Renting or Borrowing. Everything Will Become "On-Demand"

"Technology has made renting things (even in real time) as simple as it made buying things a decade ago" – Fred Wilson

New Enterprise Drone Management Platforms Change the Game for Logistics

Political Battles Will Play Out in the 5th Dimension

NBCNEWS   HOME   TOP VIDEOS   ONGOING: AIRASIA PLANE CRA

U.S. WORLD LOCAL POLITICS HEALTH TECH SCIENCE POP CULTURE BUSINESS INVESTIGA
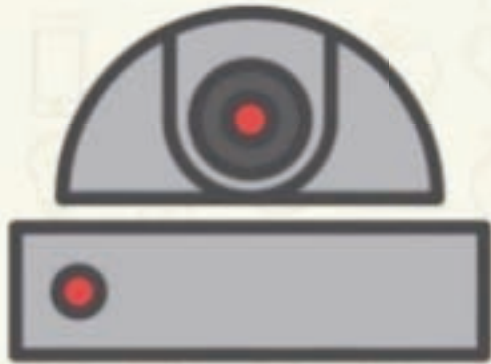
North Korea blaming US for cyberattacks, promising 'inescapable deadly blows'

U.S. CYBER WAR COMMAND

Click to access the Cyber Warfare Command and Control System

Your Privacy is Gone: It Was Traded for Security and Also Better Customer Experiences

Big Data & Beacons: Connecting online, in-app, and in-store experiences

- Footfall, visits online, visits through apps

- Regency and frequency of visits, behaviors and transactions

- Brand affinities

- Favorite products

- Demographics

- Location

- Loyalty program utilization

- Service quality, queue and abandonment

- Capacity planning and resource utilization

Beacons provide businesses with endless opportunities to collect massive amounts of untapped data, such as the number of beacon hits and customer dwell time at a particular location within a specified time and date range, busiest hours throughout the day or week, number of people who walk by a location each day, etc. Retailers can then make improvements to products, staff allocation in various departments and services, and so on.

WEBROOMING VS. SHOWROOMING

BROWSE ONLINE

BUY IN-STORES

BROWSE IN-STORES

BUY ONLINE

- Webrooming more common than showrooming (69% to 46% respectively), according to Harris poll
- Millennials prefer webrooming
- Amazon remains #1 destination for both showrooming and webrooming
- Emerging connected in-store experiences link online and offline, leveraging both

Mass Personalization and Full Funnel Marketing Suites Reset Vendor Landscape and Change How Brands "Think"

New adtech companies will focus on strategy + programmatic context, content AND ads

Publishers will offer in-house capabilities for behaviorally programmatic targeting of premium advertising

Optimized mobile affiliate tracking capabilities

Omni-Channel finally becomes mainstream in 2015

Brands must think like their customers to create seamless omni-channel shopping experiences that keep customers engaged at all stages.

Brian Solis

brian@altimetergroup.com

briansolis.com

Twitter: @briansolis

For more information & to buy the

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http://bit.ly/engage2

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