

The mobile explosion

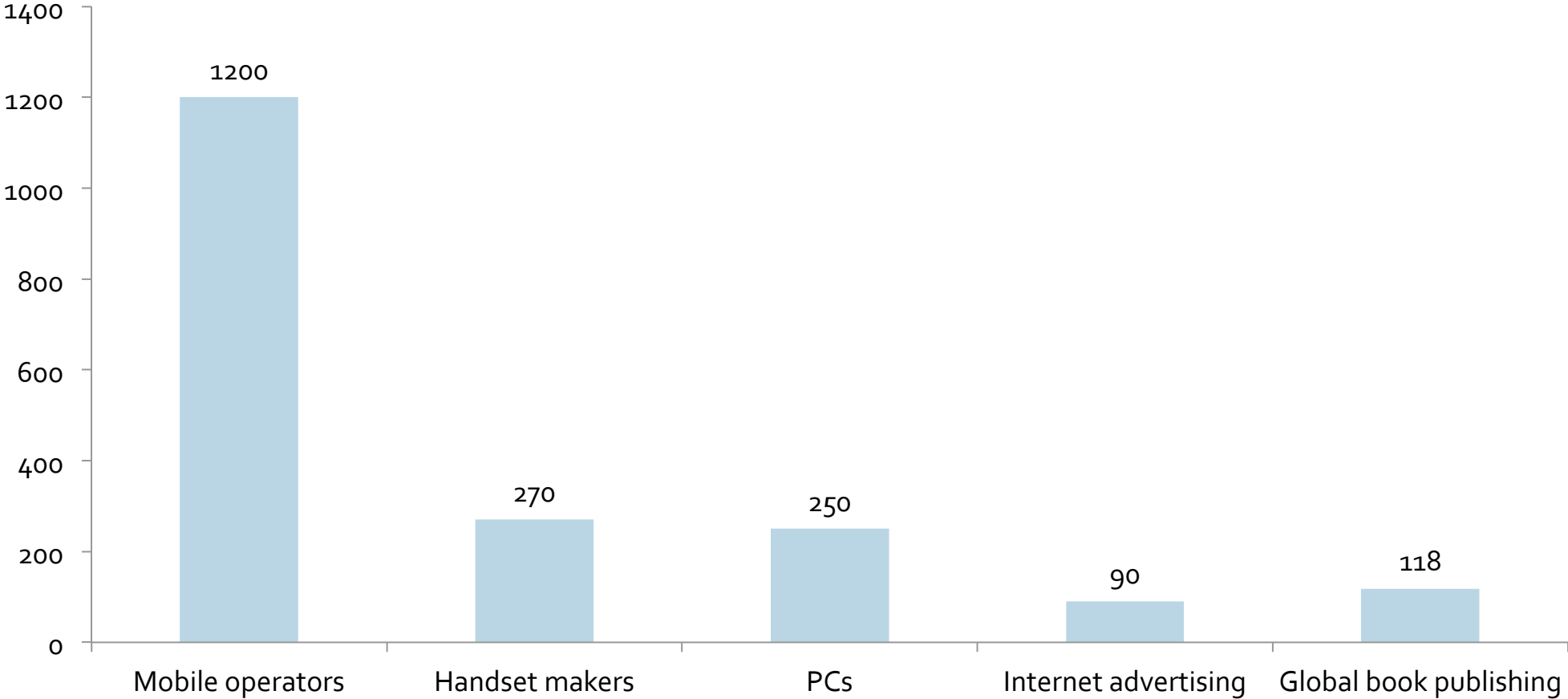
Presented at Publishers Forum 2013

Benedict Evans / @benedictevans / benedict.evans@endersanalysis.com

“Software is eating the world”
Marc Andreessen

Industry size

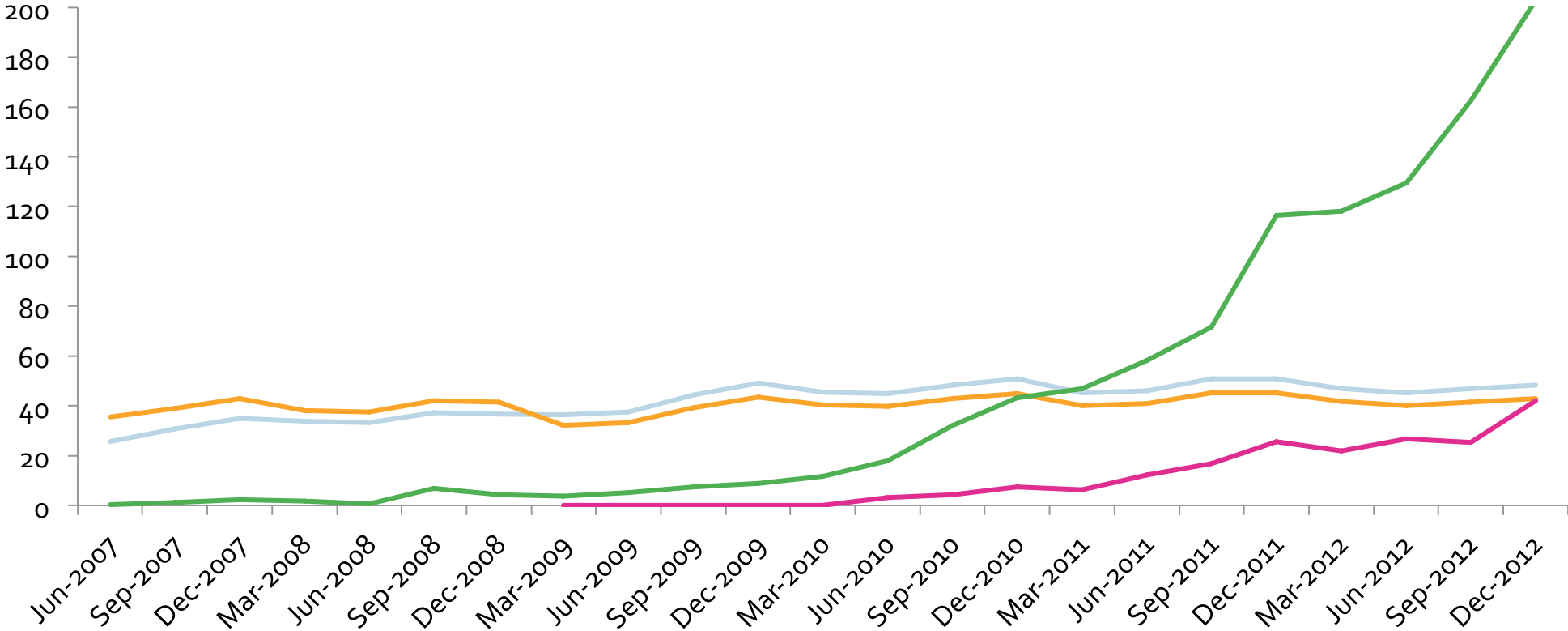
2012 global industry revenue (\$bn)



[Source: Enders Analysis]

Tablets and smartphones are already selling 4x PCs

Quarterly unit sales (m)

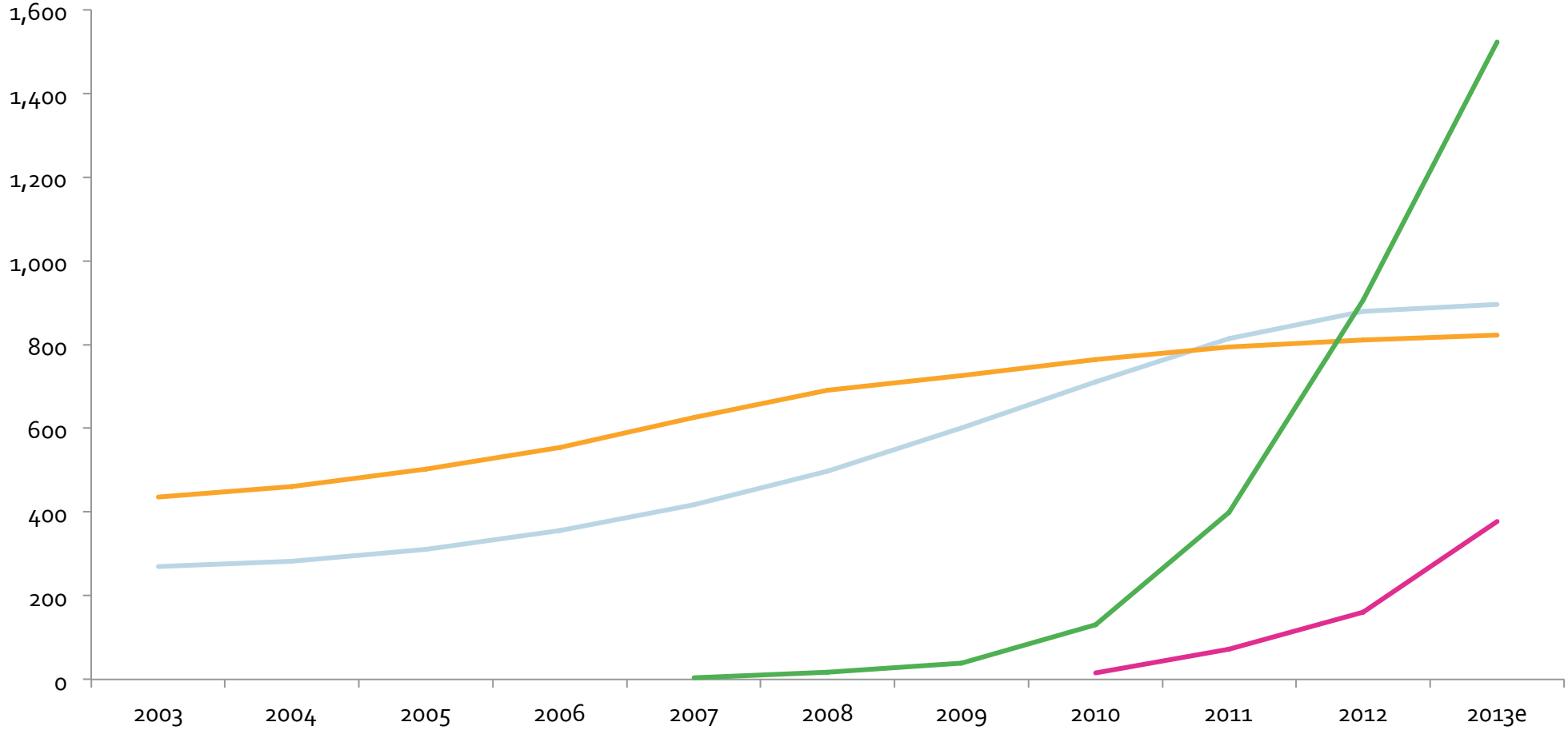


Consumer PC Corporate PC iPhone & Android Tablets

[Source: IDC, Gartner, Enders Analysis]

Mobile devices fast catching up with the PC base

Global install base (m)

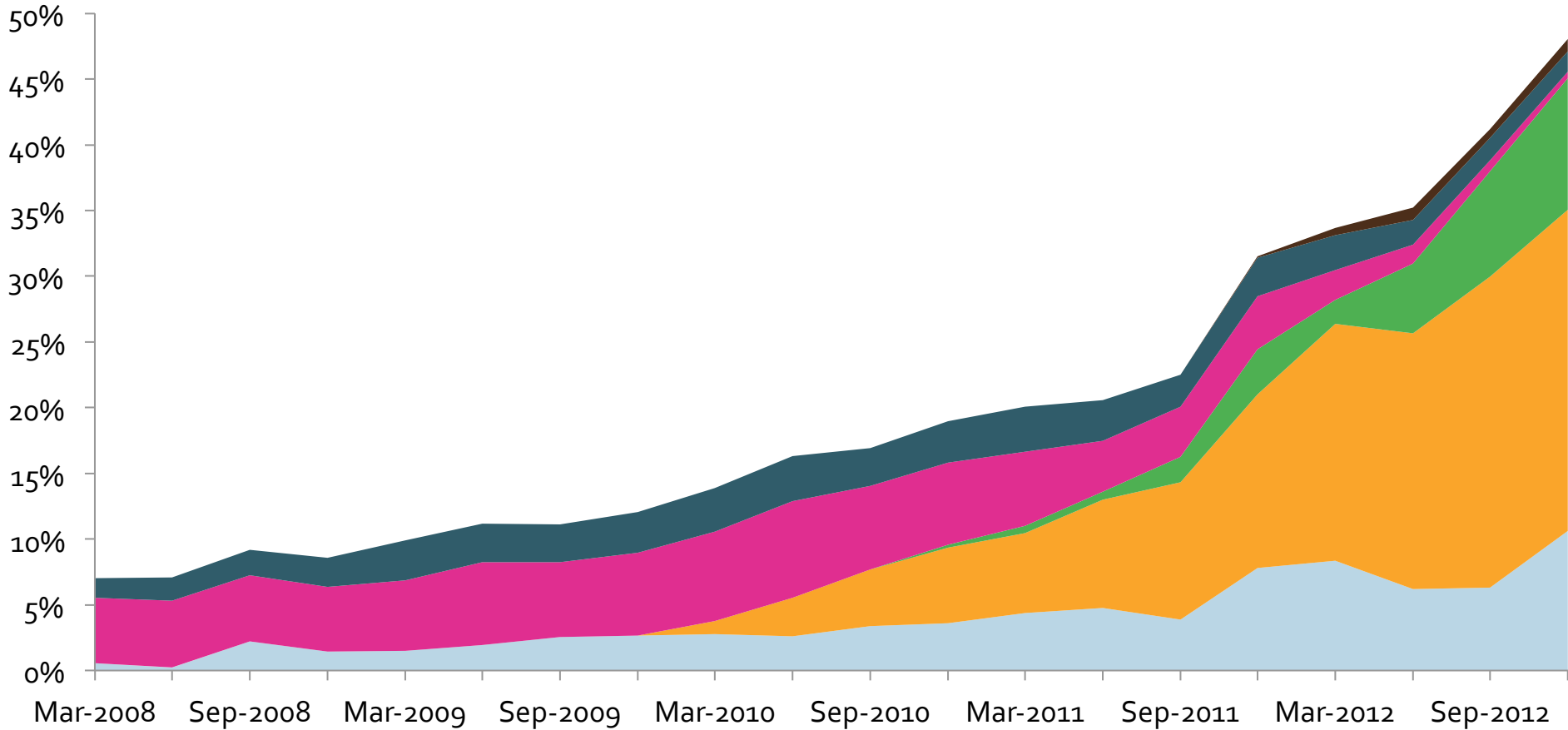


Consumer PC Corporate PC iPhone & Android smartphones Tablets

[Source: Enders Analysis]

Smartphone sales pass 50% of all phone sales, dominated by Apple and Android

Smartphone share of global mobile phone unit sales

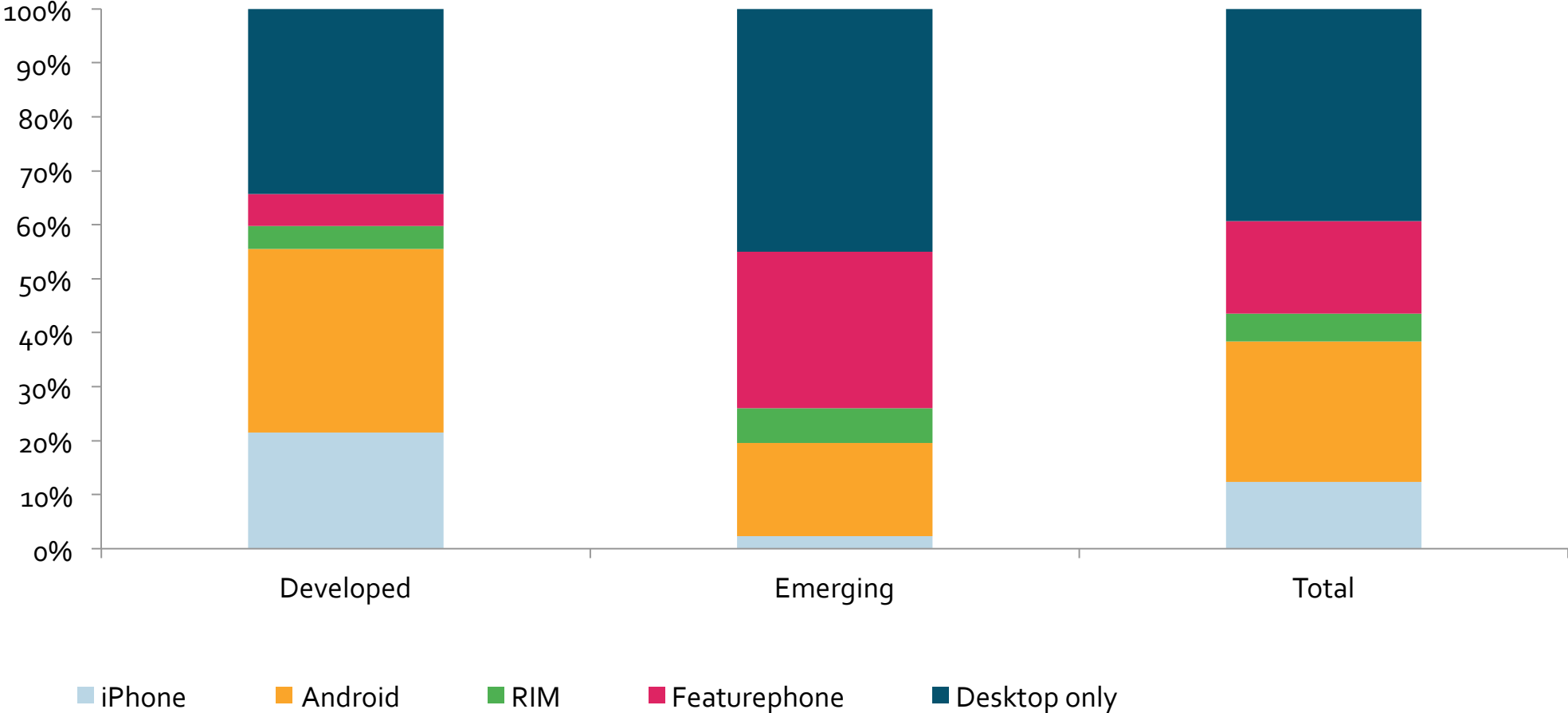


iPhone Activated Android Unactivated Android Symbian RIM Windows Phone

[Source: Apple, Google, Nokia, RIM, Enders Analysis]

Still more penetration growth to come

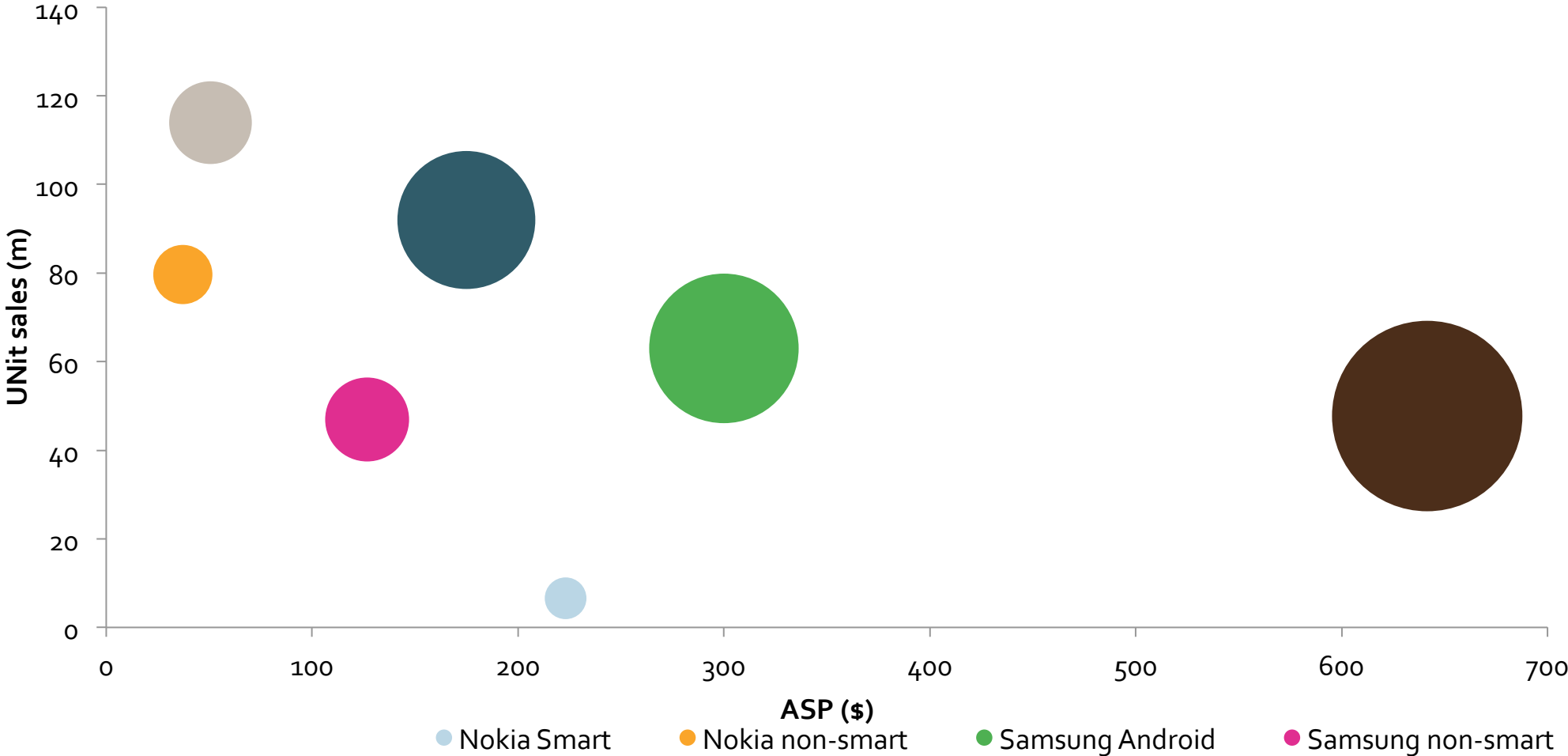
Facebook users by platform (November 2012)



[Source: Facebook, Enders Analysis]

Apple has the high end, Samsung has the mid-range

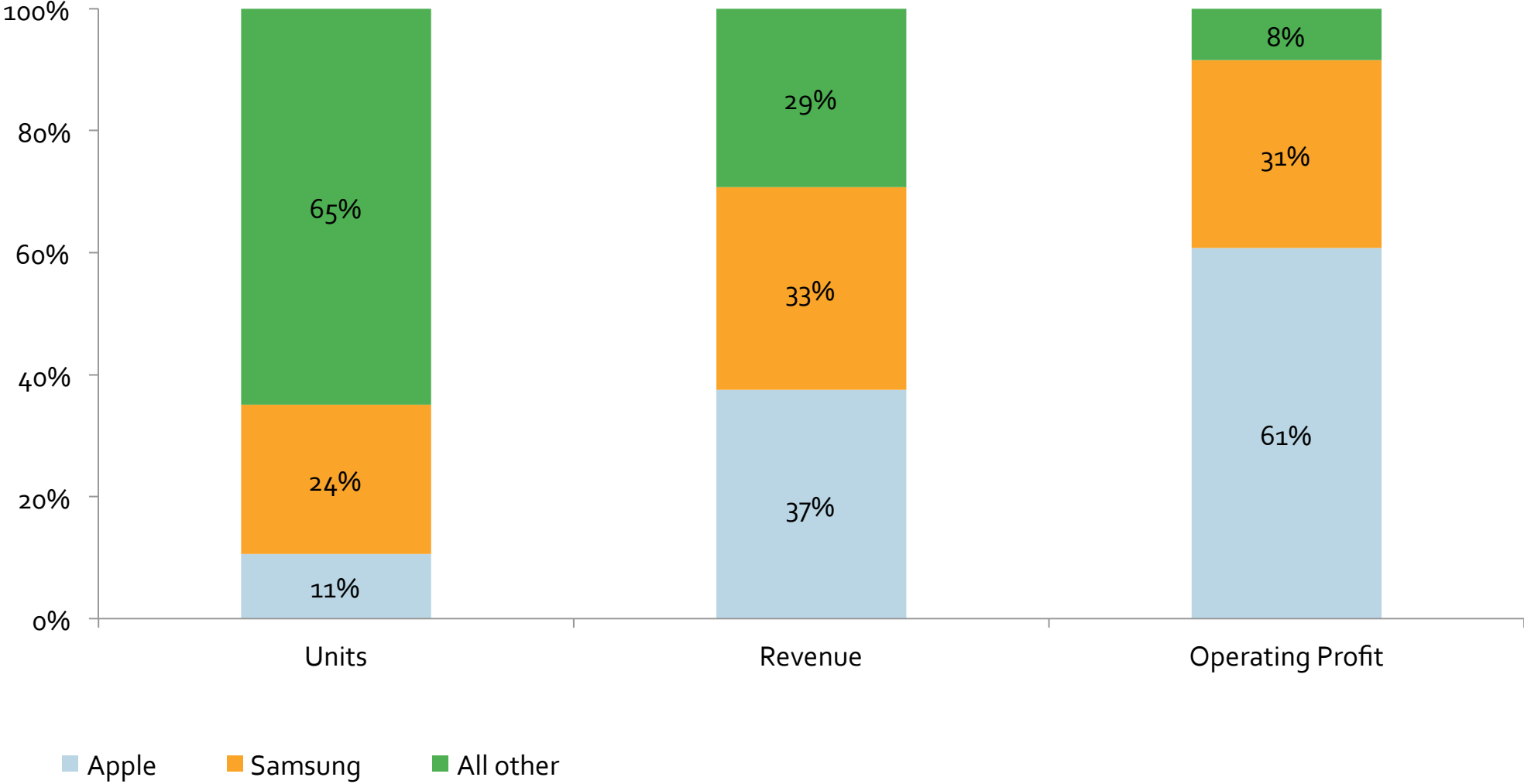
Global handset industry, Q4 2012



Bubble size = revenue [Source: Enders Analysis]

Disproportionate financials

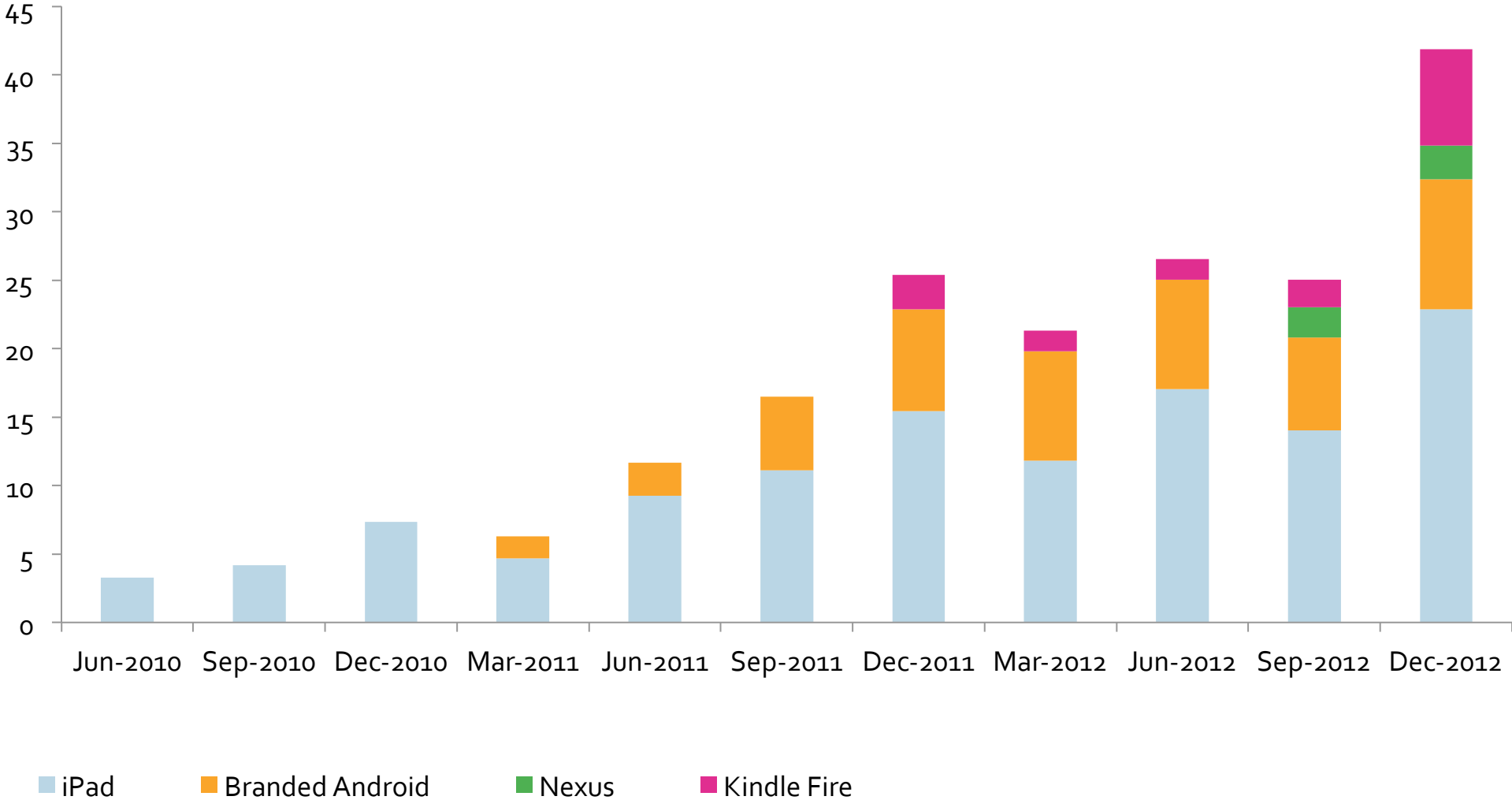
Global handset share, Q4 2012



[Source: Apple, Samsung, Enders Analysis]

Apple still dominates branded tablets (it seems)

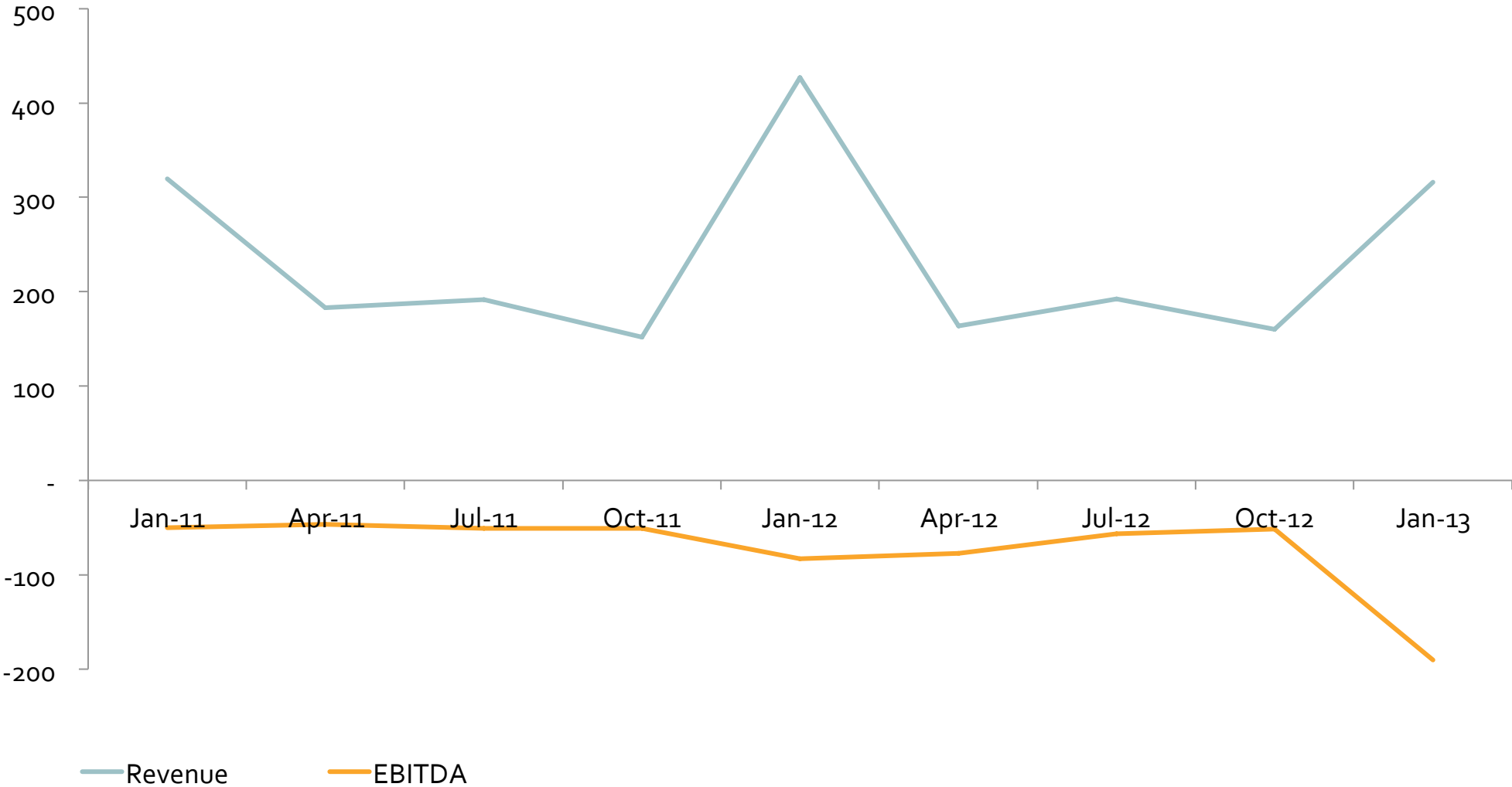
Quarterly tablet sales (m)



[Source: Enders Analysis]

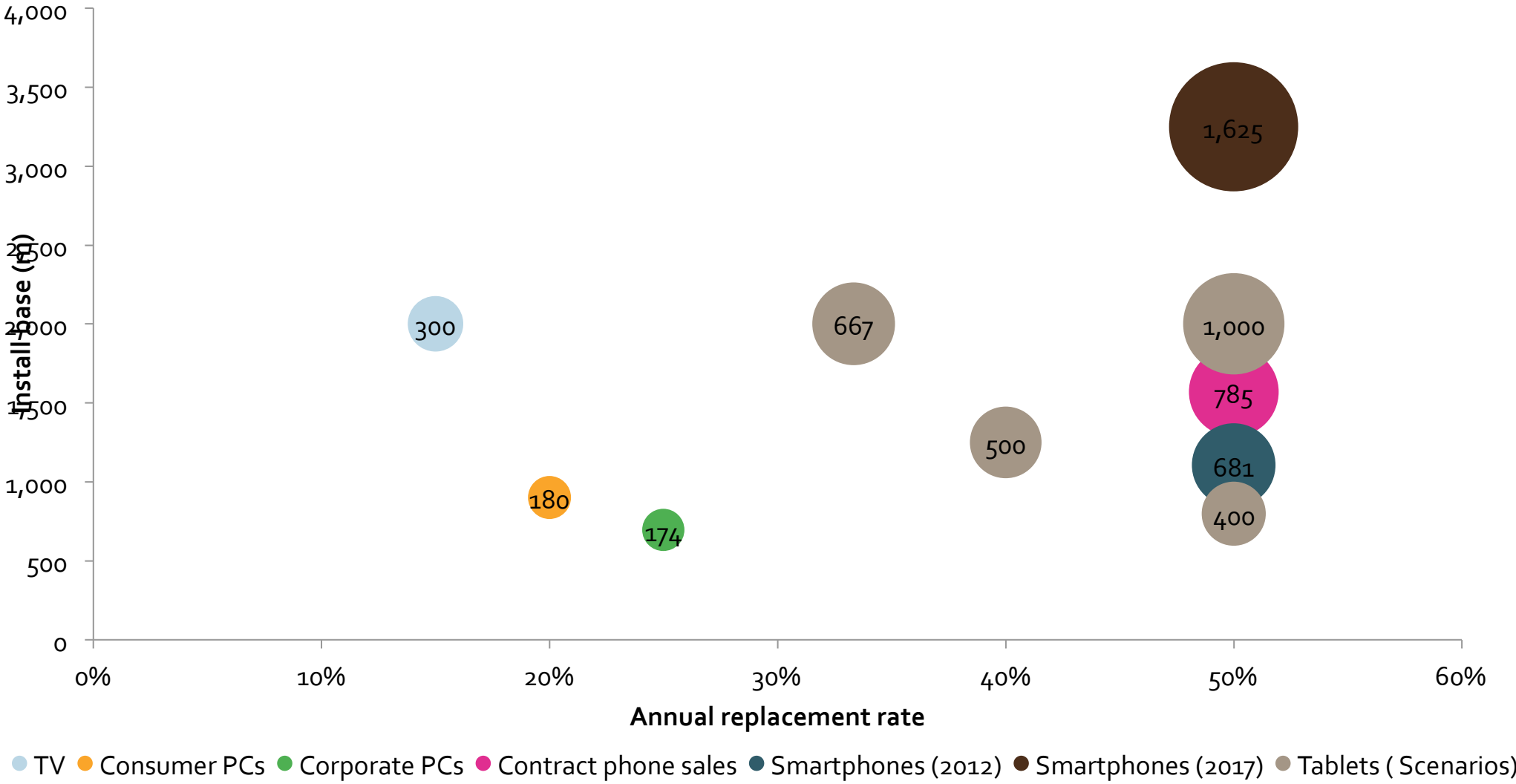
E-Ink and dedicated 'ebook tablets' may have been a temporary phenomena

NOOK performance (\$m)



Tablet will be the universal device

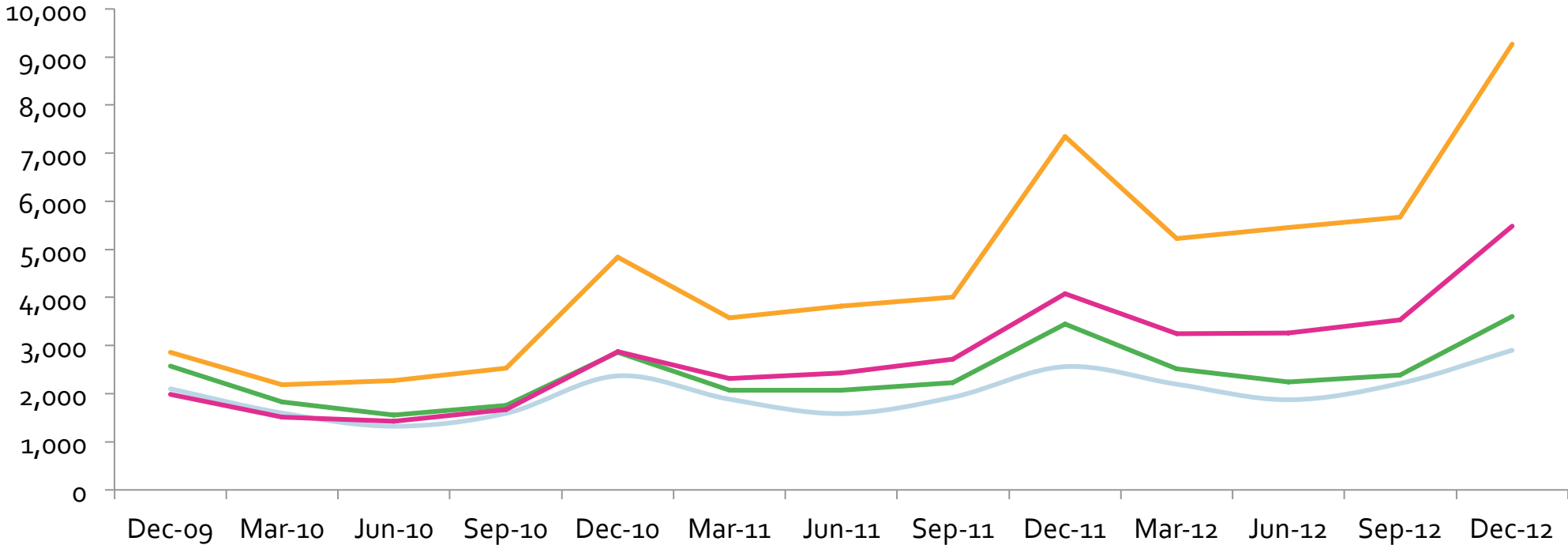
Use and replacement of CE devices



[Source: Enders Analysis]

However, Books are far from being the most important thing to Amazon

Amazon revenue by segment (\$m)

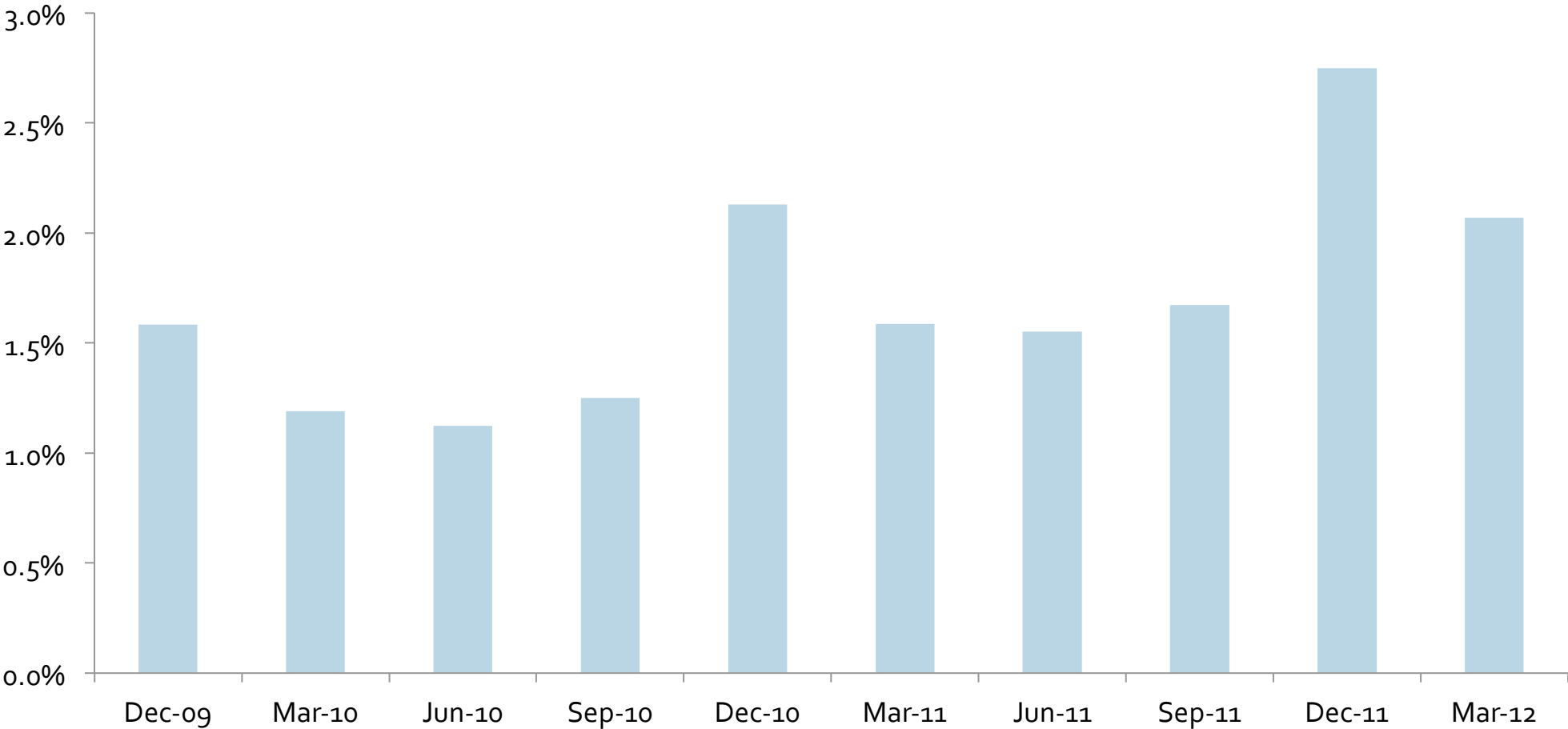


— North America Media — North America General Merchandise — International Media — International General Merchandise

[Source: Amazon]

Long-term ambitions at Amazon: Sears Roebuck of the 21st century

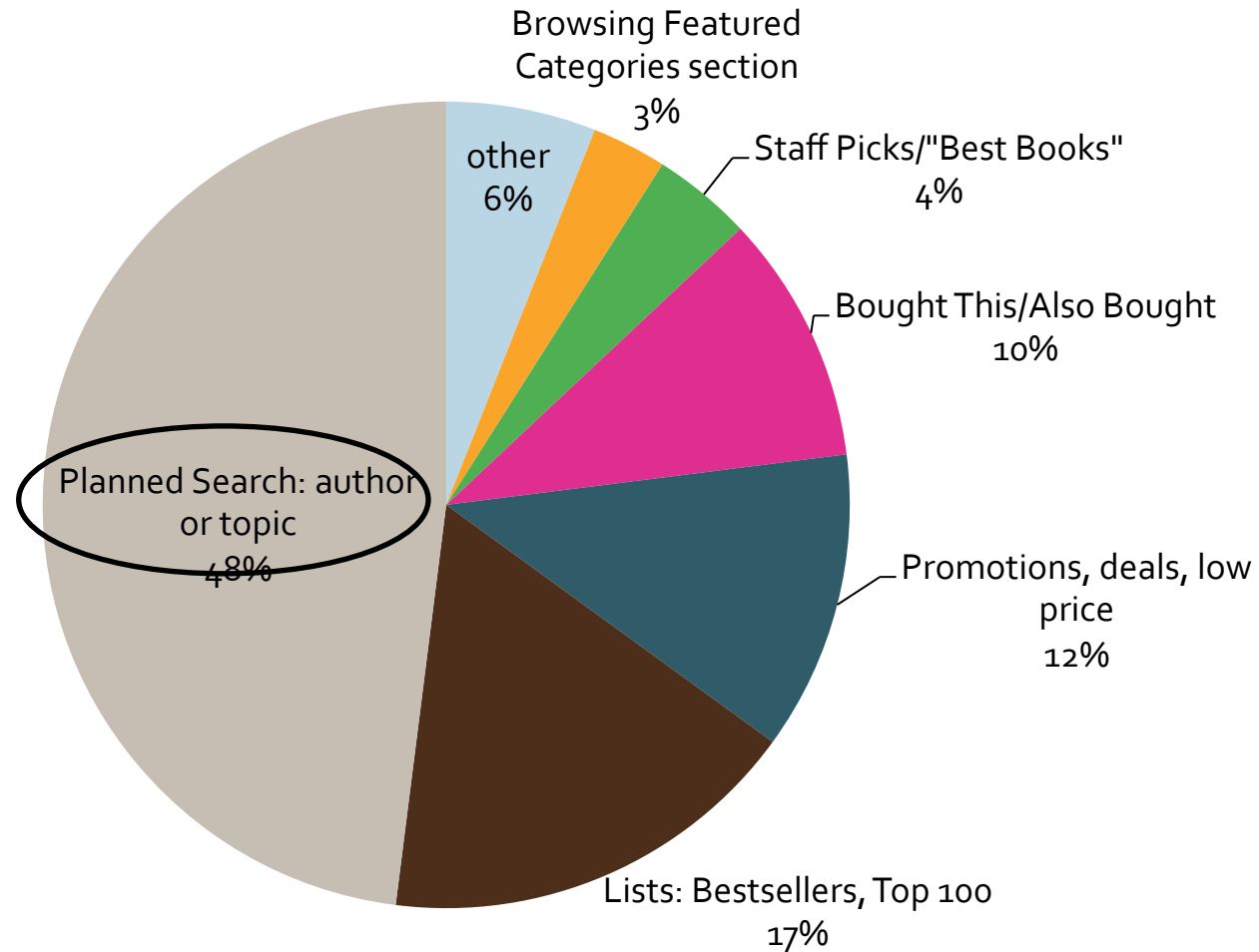
Amazon NA revenue as % US non-food service retail



[Source: Amazon, US Census, Enders Analysis]

Amazon – only the end of the funnel, so far?

Book choosing methods on Amazon.com (2012)



[Source: Codex Group]