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BUILDING A ROUTE TO MARKET THROUGH MOBILE AND TABLET PLATFORMS – PART 1

An overview of which devices and operating systems to consider when building your mobile strategy

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Why you should read this whitepaper

This whitepaper is the first in a two-part series, designed to help brands and businesses choose the best route to market in the fragmented, multi-platform world in which we live.

Here in Part 1 you will gain an understanding of the benefits and drawbacks of the various personal media* technology platforms and gain insight into which platforms will prove popular in the years ahead.

Part 2 of this report, to be published in the coming weeks, will focus on the different approaches to multi-platform development that are currently available, along with analysis of the benefits and challenges of each approach, helping you to solve the multi-platform question that likely exists within your business.

* Personal Media encompasses the growing range of personal devices from smartphones to tablets, gaming consoles, connected televisions and eBook readers like the Kindle. Through these devices it is possible to communicate with consumers like never before – personally – and therefore businesses have to treat content delivery on these devices very differently.

Whilst outside the scope of this whitepaper, it is worth recognising that although we're focusing on smartphones and tablets right now, the scope of these personal media technology platforms extends to all connected devices of the future, including smart televisions, in car entertainment systems and gaming consoles.

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Executive summary

Whether you're a brand trying to reach your consumers or a business trying to mobilise your workforce, the sheer number of different technology platforms available to you can appear confusing. Apple iOS, Google Android, RIM BlackBerry, HP WebOS, Microsoft Windows Phone 7 and Symbian are the main players in the mobile and tablet ecosystem battle. Tigerspike are often asked "which platform should I develop for first?". This whitepaper, the first in a two-part series, has been written to provide you with an overview of all the available personal media technology platforms and will offer analysis of some key trends in the market.

In December 2010 more smartphones were sold globally than desktop and laptop computers combined and annual sales of tablet computers are expected to rise to almost 300 million within the next 4 years. Whilst this growth presents many new and exciting opportunities, the market for smartphones and tablets is becoming increasingly complex to navigate.

For each platform we will provide a brief history and summarise the range of devices, app stores and monetisation options that are available on each.

The key topics that we'll be addressing in this report are:

1. An overview of the different personal media technology platforms

2. Which platforms consumers are using now, and what they will be using in the next 12-24 months

We will provide a brief history of each of the top six mobile and tablet platforms and offer our predictions on how we expect each platform to evolve in the coming years.

The six platforms that we will look at are:

• Apple iOS

• Google Android

• RIM BlackBerry

• Microsoft Windows Phone 7

• Symbian

• HP webOS

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Apple iOS

Introduction

Apple are credited with kick-starting the smartphone revolution by launching the first iPhone in 2007. The launch of the App Store in the same year was another game changing move by Apple that gave developers around the world the ability to create and sell apps. This offered a cost effective route to market for many independent app developers, who would have otherwise drowned in a market then dominated by exclusive distribution deals between handset manufacturers and network operators.

Devices (smartphone handsets and tablets)

Apple have refreshed the iPhone every year since its launch, always managing to make use of the latest technology and have attracted millions of new customers to their platform. Apple reported in January 2011 the company had sold a total of 160 million iOS devices globally (iPod Touch, iPhone and iPad combined).

What Apple did to the smartphone market in 2007, they repeated in 2010 in the tablet market with the introduction of the iPad. With a good 12 month head start on the competition and an encouraging version 2 of their iPad recently released, Apple look set to dominate the tablet market for the foreseeable future.

Distribution (applications and application stores)

Apple are well known for wanting to keep tight control of their ecosystem and, as such, issue strict guidelines around exactly what iOS apps are, and aren't, allowed to do. All iOS applications are reviewed by Apple, in a process that can take up to two weeks.

There are currently over 350,000 apps available in the Apple App Store.

Monetisation options

Apple were the first to introduce developers to the 'freemium' monetisation model, which allows developers to offer users a free initial download and then choose to purchase extra premium content within apps via an in-app purchase. Additionally, Apple have recently started offering subscription payments, whereby publishers can automatically bill users periodically for access to premium content.

Apple will take a 30% cut of all purchases and, to protect their revenue stream, Apple have stated that if an app offers users a method to pay for premium content outside of the app (e.g. through a website), then users must also be able to purchase the same content via an in-app purchase. Additionally, all content that is available through an inapp purchase must be priced at the same level (or lower) as it's priced outside of the app, which creates commercial restrictions for content owners trying to monetise through multiple channels.

After offering many publishers an initial grace period, Apple are now gearing up to evict those apps from the app store who do not adhere to the new rules around in-app subscriptions detailed above. Apple have set a deadline of June 30th 2011 for this to happen.

Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

iOS smartphone market share as a percentage of worldwide smartphone sales:

- 2010: 15.7%
- 2012: 18.8%*
- 2015: 17.2%*

iOS will continue to be a popular choice with consumers and we expect Apple to maintain a healthy 15-20% share of the smartphone market.

Tablets

iOS tablet market share as a percentage of worldwide tablet sales:

- 2010: 83.8%
- 2012: 63.5%*
- 2015: 47.1%*

Apple are well positioned to maintain their dominance of the tablet market for the next 12 months. This clear head start on the competition will mean that Apple are able to lead the tablet market for many years to come.

forecast courtesy of Gartner, April 2011

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Benefits of developing iOS applications

- Flexible options to monetise your applications with in-app payments and recurring subscriptions.

- As a tablet platform, iOS is around twelve months ahead of its closest tablet competition.

- Large install base of iOS devices.

- Having just one screen size (iPhone/iPod Touch) simplifies app design.

Challenges developing on iOS

- No Flash support.
- Apple reserve the right to change their App Store rules at any time (and have been known to do so).
- App approval process can sometimes cause frustration.
- Pricing and promotion restrictions.

Should I invest?

If you're planning to take your first step into mobile and tablet applications then Apple iOS is a great place to start. Apple have a strong presence in the smartphone market and currently dominate the tablet market. If you're looking to launch a high-impact brand presence through a mobile app, then iOS would be the recommended route to market. You may also consider developing an iOS Universal Application for iPhone and iPad. The backend framework of Universal Applications can be replicated across both devices, with only frontend user interface changes being needed. This can help keep costs down.

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Google Android

Introduction

Google launched the Android operating system in 2008 as a direct response to the success of the iPhone. They made the platform openly available to handset manufacturers to use on their devices and launched the Android Market as their own version of Apple's App Store. By 2009 Android had gained some popularity and had achieved around 4% market share of smartphone sales. By 2010 this number had jumped to over 20%, an achievement that most market analysts (including both IDC and Gartner) had failed to predict. The steady rise in popularity of Android looks set to continue, with the majority of handset manufacturers choosing the platform to power their flagship smartphone models.

Google are pushing to constantly evolve their Android platform, and as such, release an updated version of the operating system approximately once every 6 months.

Devices (smartphone handsets and tablets)

The Android OS is now found powering an ever increasing range of smartphone and tablet devices, from a variety of manufacturers. The latest version 3.0 of Android, called "Honeycomb", has been designed specifically for tablets, and the first commercially available device running Honeycomb, the Motorolla Xoom, went on sale in April 2011.

The smartphone versions of Android (2.2 "Froyo" and 2.3 "Gingerbread") will be combined with the tablet version (3.0 "Honeycomb") to form a new version (4.0 "Ice Cream Sandwich"), which is scheduled for release in Q4 2011.

Globally, Android is seeing success in all sections of the smartphone market, where it's quickly gaining share from BlackBerry and Nokia. Google are activating around 400,000 new Android smartphones each day, with a worldwide install base of over 100 million devices. Manufacturer support for Android is strong, with 310 different devices currently in the market from 36 manufacturers.

Distribution (applications and application stores)

The total number of applications available on Android Market has reached 200,000 apps, over three times what it was only a year earlier.

RIM have recently announced that following the release of their BlackBerry PlayBook tablet, there will be an 'Android Player' app that will allow users to run Android apps on the PlayBook. This is an

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interesting move from RIM, which demonstrates the success of the Android platform.

Monetisation options

Google offers developers the same 70/30 cut of revenue as Apple and recently launched the ability to process in-app payments through the Android Market. Monetising apps through this 'freemium' model had proved a popular way of monetising applications since it launched on Apple's platform a little over 18 months ago. Android Market does not yet offer a subscription payment option, but we expect this to be forthcoming in the next 6-12 months.

Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

Android smartphone market share as a percentage of worldwide smartphone sales:

• 2010: 22.7%

• 2012: 49.2%*

• 2015: 48.8%*

The popularity of Android smartphones is only set to increase in the years ahead. The platform has come from nowhere in 2 years to take over 20% of the global smartphone market. With most of the world's major handset manufacturers, including HTC, Samsung and Motorola choosing to support Android and with the constant addition of new features from Google, we expect the platform to dominate the smartphone market in the long term.

Tablets

Android tablet market share as a percentage of worldwide tablet sales:

• 2010: 14.2%

• 2012: 24.4%*

• 2015: 38.6%*

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Android has experienced a less than smooth entry into the tablet

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market, with early devices failing to win the hearts and minds of consumers. The new Honeycomb version of Android offers a markedly improved user experience and we expect Android to gain a healthy share of the tablet market in the long term.

Benefits of developing Android applications:

- Support from many leading handset manufactures such as HTC, Samsung and Motorola.
- Android is on track to become the most widely used smartphone platform.
- Android offers flexible options to monetise your applications with in-app payments.
- The Honeycomb tablet operating system, whilst not yet expected to topple the iPad, is an encouraging evolution of the platform.

Challenges of developing Android applications

- The open nature of the platform has led to some privacy and security concerns.
- Monetisation options are not yet as flexible as iOS.
- The range of different screen sizes and hardware button placement can make app design more complex than on other platforms.
- The constant updating of the OS since launch has caused the market to become fragmented with many different versions of the Android OS, each with slightly different features. We expect the fragmentation issue to gradually lessen as the regularity of new versions decreases.

Should I invest?

As a recommended smartphone route to market, Android is almost on par with Apple. Android will soon have a larger smartphone install base than iOS although we're still some months away from seeing the same flexible monetisation options come to Android that are currently available on iOS (such as subscriptions).

The open nature of Android means that the opportunity exists for partnerships between device manufacturers and content owners to have their apps pre-installed on Android devices – something that Apple are unlikely to ever allow.

With tablets, if you've already developed an iPad app we'd recommend that you look towards Android as your next platform.

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There will always be far more Android tablets in the world than PlayBooks or TouchPads. If you're planning your first tablet app we recommend developing for the iPad first, but Android should be considered as a close second.

RIM BlackBerry

Introduction

BlackBerry has recently suffered a number of setbacks, whereas before the days of the iPhone, BlackBerry was a smartphone market leader. The key to their success was their enterprise offering, which gave IT administrators a cost effective solution to securely mobilise their Microsoft Exchange email systems. Since 2008 however, BlackBerry have failed to innovate their user experience enough to stay ahead and are quickly losing market share to Android and Apple. Despite these setbacks, BlackBerry discovered that their BlackBerry Messenger application (BBM) had become incredibly popular in the youth market and began to reposition their brand to attract a greater share of this market.

Devices (smartphone handsets and tablets)

BlackBerry has a worldwide install base of over 50 million smartphones and their product line has recently evolved to include a new range of touch-screen smartphones.

When planning their tablet strategy, possibly in a direct response to the criticisms around user experience on their smartphone devices, BlackBerry went back to the drawing board and acquired a company called QNX Software Systems, who would provide an entirely new operating system for RIM's first tablet, the PlayBook. RIM have since announced that the QNX operating system will power future BlackBerry smartphones. However, this transition is not likely to occur before 2012, which, in the fast paced smartphone industry, is a long way off.

Despite an overall global decline in market share, the Middle East remains a very BlackBerry centric market, as does the global market for 18-24 year olds.

Distribution (applications and application stores)

BlackBerry App World has more than 30,000 applications, all of which are reviewed by BlackBerry before being sold.

We're expecting to see RIM launch App World version 3.0 somewhere in the second half of 2011, which will introduce weekly/monthly subscription billing options and support for carrier billing with an increased number of network operators.

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Monetisation options

The BlackBerry Payment Service handles payments on the App World and offers developers the same 70% share of sales as the other platforms. The Payment Service stores users debit/credit card details to allow for the purchase of applications. Additionally, the service also offers users the option to pay for their apps with their PayPal account if they would prefer.

Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

BlackBerry smartphone market share as a percentage of worldwide smartphone sales:

- 2010: 16.0%
- 2012: 12.6%*
- 2015: 11.1%*

BlackBerry have been steadily losing smartphone market share over the past two years. Unless RIM are able to quickly innovate and improve the user experience on their devices, we expect this decline to continue. RIM have taken steps to do this by announcing that the PlayBook's QNX operating system will power future BlackBerry smartphones, but we believe this could be too little too late in a market that moves at breakneck speed.

Tablets

PlayBook tablet market share as a percentage of worldwide tablet sales:

- 2010: 0.0%
- 2012: 6.6%*
- 2015: 10.0%*

It's too early to tell with any certainty how popular the PlayBook will be, but the initial signs look promising for RIM. The PlayBook user experience is a step up from that of BlackBerry smartphones and the device is likely to appeal to the BlackBerry brand advocates of the enterprise world, which is a large section of the market.

forecast courtesy of Gartner, April 2011

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Benefits of developing BlackBerry applications

• The platform is known for its security.

• Highest average revenue-per-app (higher than iOS and Android).

• High number of devices in the market.

Challenges of developing BlackBerry applications

• No subscription payments yet.

• Difficult to create a stand-out user experience on non-touchscreen phones.

• Monetisation options are not yet as flexible as iOS.

• Declining market share.

• Many companies do not allow employees to install 3rd party applications on their company BlackBerry's.

Should I invest?

Whilst BlackBerry has a high install base and an established and loyal customer base, the current version of the BlackBerry smartphone operating system can be restrictive if you're trying to make a standout application due to the smaller screen sizes and lack of a touch interface on some models.

BlackBerry appear to be heading in the right direction to address these concerns, but right now they are definitely the runner-up to Apple and Android and we would not recommend BlackBerry development as a first step into mobile.

If you choose to develop for BlackBerry as a way of targeting business users, be aware that many companies do not allow for the installation of 3rd party application on corporate devices.

The PlayBook launch and the introduction of the new QNX operating system will help BlackBerry slow the rate at which they're losing market share. As a tablet platform, BlackBerry are also the runner up to Apple and Android, but the PlayBook has only been in the market for less than one month and it is very early days.

Microsoft Windows Phone 7

Introduction

Microsoft were powering smartphones long before Apple came on the scene in 2007. The original Windows Mobile operating system was popular amongst business users in the early 2000's. In 2004, Windows Mobile accounted for 23% of worldwide smartphone sales. However, a failure to innovate the Windows Mobile user interface in the post-iPhone era of smartphones led to a steady decline in market share. In 2009 Microsoft's share of the smartphone market had fallen to less than 6%. This prompted Microsoft to drastically reboot their mobile strategy, essentially scrapping Windows Mobile as it then stood and starting again from scratch. The mobile development teams at Microsoft spent the following 12 months working on what would later be called Windows Phone 7.

Launched in October 2010, Windows Phone 7 was a great improvement on its predecessor, although initial end-user sales numbers are possibly below Microsoft's expectations. In February 2011, Nokia and Microsoft announced a partnership that would position Windows Phone 7 as the primary operating system for all future Nokia smartphones.

Devices (smartphone handsets and tablets)

Since launching Windows Phone 7 last October, Microsoft have reportedly sold in the region of 2-3 million Windows Phone 7 handsets, although the reported numbers refer to OEM shipments, not sales to consumers. It's not yet clear how consumer adoption of this new platform will play out in the near term, but with Nokia on board as a hardware partner, we expect to see continued long term growth in the coming years.

When it comes to tablets, Microsoft has yet to announce their plans. We're expecting Microsoft to announce Windows 8 this summer, a new version of their desktop Windows 7 operating system, with a multi-touch UI designed for tablet use.

Distribution (applications and application stores)

Windows Phone 7 currently has a relatively modest app catalogue of 16,000 apps. Microsoft have decided to review and approve all applications in a similar way to Apple and BlackBerry.

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Monetisation options

Windows Phone 7 is slightly behind the other platforms in terms of monetisation options. It's not yet possible to offer users the option of an in-app purchase or a subscription. Apps can be offered to users on a 'trial' basis, where users can try the app before deciding to purchase it later, but this does not extend to the incremental unlocking of features that can be achieved using in-app payments on iOS, Android and BlackBerry. Like all of the other platforms, Microsoft will take a 30% cut of all purchases.

Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

Windows Phone smartphone market share as a percentage of worldwide smartphone sales

- 2010: 4.2%
- 2012: 10.8%*
- 2015: 19.5%*

Microsoft executed a huge marketing campaign to generate buzz around the launch of their new platform in October 2010. When asked to comment on initial sales, Microsoft always quote 'OEM shipment' numbers and not end user sales, which may indicate that Microsoft are quietly disappointed with the initial success of the platform. The Nokia partnership is expected to give the platform a much needed boost, but if the new devices are not launched soon it may, like BlackBerry, be a case of too little too late.

forecast courtesy of Gartner, April 2011

Benefits of developing Windows Phone applications

- Having Nokia as a hardware partner means that Windows Phone 7 is likely to increase its reach quickly, once these devices launch in 2012.
- Integration with existing Microsoft Office suite.

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Challenges of developing Windows Phone applications

• No subscription payments yet

• No in-app payments yet

• No clear path to tablet support from Microsoft.

• Slow consumer adoption.

Should I invest?

As a relatively new and as yet unproven platform, we would recommend developing applications for iOS and Android before considering Windows Phone as a platform, but we expect Windows Phone to become more popular in the years ahead as the Nokia partnership begins play out.

An additional concern we have with the platform is that there is no clear tablet strategy. iOS, Android, webOS and (to some extent) BlackBerry all have a development platform that incorporates both smartphone and tablet development into one common code-base. This is not yet the case with the Windows Phone platform, and we're waiting to see how Microsoft will address this.

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Symbian

Introduction

The Symbian platform has a long and complicated history, having started out in 2008 as an open source project that powered over 40% of the world's smartphones, before being brought in-house by Nokia in 2010 and then being dropped altogether by the same company a little over a year later.

Nokia heavily invested in the development of the Symbian platform, but each significant upgrade failed to deliver the overhaul to the user experience that was needed to enable Symbian to compete with the iPhone and (more recently) Android.

Perhaps considered the 'original' smartphone platform, Symbian had been steadily losing market share to its competitors until Nokia eventually announced that they would be withdrawing future support for the platform, after reaching a deal with Microsoft to have Windows Phone 7 power Nokia smartphones of the future.

Devices (smartphone handsets and tablets)

Whilst the long-term future of the Symbian platform is unknown, in the short term we have to acknowledge that this platform is still powering millions of Nokia handsets globally and we expect Symbian to remain particularly prevalent in the developing areas of the world such as Africa, where a new mass market of mobile consumer is evolving. There are more Symbian devices in the world right now than there are iOS and Android devices combined, although that gap is quickly closing.

Symbian also has a stronghold in Japan, where many major handset manufacturers are still making Symbian devices, but we expect Symbian to lose market share in Japan to Android over the coming years.

The worldwide install base is estimated to be in the region of 825 million devices, although this includes all historic versions of the Symbian OS. Nokia estimate that they had sold 75 million touch-screen Symbian devices to the end of 2010.

Distribution (applications and application stores)

The largest app store for Symbian apps is Nokia's Ovi Store, although Nokia have announced that they will be launching a new app store that utilises the Microsoft Windows Phone Marketplace infrastructure. This launch is likely to come ahead of the first Nokia Windows Phone

(due H1 2012). It is not yet known whether or not this new app store will distribute Symbian apps.

At the last count (March 2011) the Ovi Store had 54,024 applications, with over 5 million daily downloads.

Monetisation options

Nokia take the standard 70% cut from Ovi Store sales and also support in-app purchases. Nokia have a number of carrier billing agreements, which allows users to charge application purchases to their mobile bill. This is one of the platforms major strengths, and we expect Nokia to take these carrier billing agreements with them to the Windows Phone platform.

Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

Symbian smartphone market share as a percentage of worldwide smartphone sales:

• 2010: 37.6%

• 2012: 5.2%*

• 2015: 0.1%*

Symbian's prospects as a future smartphone platform are not positive. It is set to go from a market leading position to relative obscurity over the coming years and is a true testament to the level of innovation that is required to stay ahead in this market.

forecast courtesy of Gartner, April 2011

Benefits of developing Symbian applications

• There are more Symbian smartphones in the market than iOS and Android combined.

• Symbian is likely to remain a popular choice in the low-end smartphone market.

• Nokia have more global carrier billing agreements than any other manufacturer or platform.

• Web Runtime (WRT) allows rapid development of simple applications.

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- Symbian is an effective route to market in developing markets.

Challenges of developing Symbian applications

- Symbian market share is likely to quickly decline in developed nations as Nokia begin to ship Windows Phone 7 handsets.
- Developing for all the range of different screen sizes available can increase development time.

Should I invest?

You could argue that any investment in Symbian development will lose its value beyond 12 months, but despite the gloomy outlook for the Symbian platform as a whole, Nokia handsets are still a popular choice amongst certain demographic groups.

In developed markets, we would not recommend Symbian development as part of a long term strategy, but at the same time if you want to target the busy stay-at-home mother, it's likely that she'll have a Nokia handset running Symbian.

Symbian smartphones will also continue to be used in the developing world, where handsets are not replaced every 12-18 months, as is common in developed nations. If you want your brand to have a presence in the developing world then Symbian may offer an effective route to market for the next 12-24 months.

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HP webOS

Introduction

In 2010, Hewlett Packard acquired smartphone maker Palm, with webOS being described as a key asset and motivation for the strategic purchase. Prior to this acquisition, the previous versions of webOS had received praise from within the tech community for its multitasking capabilities and ease of use, but Palm had failed to achieve mass market adoption of their handheld computers and Palm Pre smartphones.

In February 2011, HP announced that they would be dropping the Palm brand. At the same time HP announced that they would be releasing a series of new smartphone and tablet devices that will be powered by a new version 3.0 of the webOS platform, to be released later in the summer of 2011.

Full details around the new webOS 3.0 platform are being released by HP, however with no devices currently in the market, we don't yet have an informed opinion on the platform at this stage.

Devices (smartphone handsets and tablets)

HP are going to market with three new devices to accompany the launch of webOS version 3.0. These are the HP TouchPad tablet and two smartphones, the HP Veer and the HP Pre3.

Including the discontinued Palm Pre smartphones, webOS has a combined install base of around 2.5 million devices.

Distribution (applications and application stores)

The HP app store is called the webOS App Catalog, which currently has around 6,000 applications. It is expected

that these applications will be backwards compatible with the new HP smartphones and tablets.

Monetisation options

The new version of the webOS platform will feature in-app payments but not subscriptions. Support for carrier billing on some networks is also expected.

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Market share

The market share numbers below are also shown graphically in Appendix 1 of this document.

Smartphones

There is no data currently available on webOS smartphone market share.

Tablets

webOS tablet market share as a percentage of worldwide tablet sales:

- 2010: 0.0%
- 2012: 3.9%*
- 2015: 3.0%*

HP are a huge company and are likely to task their corporate marketing machine with making the webOS platform a success, but it's still too early to gauge how webOS will perform in the long term. Whilst the webOS user experience looks promising, we wonder whether there is room for yet another development platform in an already crowded market place.

forecast courtesy of Gartner, April 2011

Should I invest?

If you already have a mobile and tablet presence on iOS and Android, then certainly consider webOS as part of your longer term strategy, but for those just getting started we'd recommend waiting for the devices to launch and watching how they sell before investing.

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Conclusions and recommendations

With so many devices and platforms in the fragmented personal media landscape, it's often difficult to know where to start when planning a mobile strategy. Spending time studying the market, in an attempt to identify the key trends, is often a good place to start.

Tigerspike would like to highlight the following key points:

- The personal media landscape is rapidly evolving – be sure that you don't get left behind by taking a wait-and-see approach. It is better to do something than nothing.

- Apple iOS and Google Android are currently the leading mobile and tablet development platforms and should both be considered as key routes to market for your brand or business.

- Tigerspike predict that iOS is set to dominate the tablet market for at least the next 12 months and Android will increasingly dominate the smartphone market.

- For subscription driven businesses, only Apple iOS currently offers subscription payments as a feature of the platform. Subscription payments on other platforms need to be managed through an external payment mechanic.

- Bear in mind the commercial restrictions of each platform and how they will influence your current business model.

- Think carefully about the devices you wish to utilise and how each one can deliver the required experience for your target audience.

Remember to look out for the second part of this series – **'Building a route to market through mobile and tablet platforms – Part 2'**, which will focus on the different approaches to multi-platform development that are currently available, along with analysis of the benefits and challenges of each approach.

In this paper we will be:

- Busting the myths around "build once, publish anywhere" solutions.

- Discussing how HTML5 web applications and mobile sites can offer cross-platform solutions in certain cases.

- Looking at how HTML5 technology can be utilised within native applications to reduce cross platform development costs.

Additionally, to register for one of our upcoming Innovation Briefing sessions, where you can learn about the latest technological advances in Personal Media, please email **asia-pacific@tigerspike.com** or contact us on the information below.

Visit **www.tigerspike.com** to find out more about the Innovation Lab and Phoenix, Tigerspike's tools for unlocking the power of Personal Media
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About Tigerspike – the Personal Media Company

Tigerspike builds closer relationships through technology.

We deliver Personal Media solutions globally via our hub offices in Sydney, London and New York. Since 2003 we have been delivering the personal media strategy, design and multi-platform development for a wealth of companies in media, telco, retail, not for profit, government, professional services and FMCG sectors including The Economist, PWC, Vodafone, Pepsi, Diageo, Time Out, Telstra, News International and World Wildlife Fund. They use our Innovation Lab to stay ahead and our Phoenix platform for effective, future proof, scalable delivery.

What is Personal Media?

Personal Media encompasses the growing range of personal devices from mobile phones to tablets (like the Apple iPad), portable and home gaming consoles and eBook readers like the Kindle. Through a mix of messaging, mobile sites and applications we can communicate to consumers like we never have before – personally – and we therefore have to treat content delivery on these devices very differently. Personal Media technology can be used to improve productivity, increase sales, enhance brand identity, improve consumer experiences, deliver location and contextually relevant information, deepen engagement and reduce costs for both consumer and employee audiences.

Why is Personal Media important?

Personal Media has created both new opportunities and challenges for a broad range of companies as it develops at lightning speed. Publishers, media companies and application developers are eager to know whether they should optimise their content for particular devices. Brands and advertisers want to understand how these devices might eventually fit into their overall marketing strategy. Carriers want to know how to evolve their business models for a data driven multi-device connected world.

Device manufacturers need to understand how consumers are using connected devices (inside and outside of the home) so they can improve their products, fine-tune their marketing and win the battle for market share. Organisation's are wondering how they can use personal media to improve communication and workflow, reduce

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cost, foster smarter working environments and even be the carrier for company values.

Tigerspike's Innovation Lab looks at the 1000 things happening in the world in Personal Media and brings you the 10 that matter. We use the Innovation Lab to stay at the forefront of innovation in Personal Media strategy, design (including user interface and user experience) and technical development. It also ensures that our service delivery platform Phoenix stays at the cutting edge by having a continuous raft of new features and functions in development.

For further information or to arrange a meeting to understand how personal media can add value to your business, please contact us:

Email: **asia-pacific@tigerspike.com**

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Unlock the Power of Personal Media