



VM **2011** global
Leadership
summit





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Founder and CEO of Global EyeVentures



Revolution of Mobile Technology

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Today's Discussion

- Mobile- From past to future
- Genesis of EyeXam and its success
- Mobile Platforms hit critical Mass
- Mobile is Global
- Social networking and mobile growth
- Time Shifting to Mobile usage
- m-Commerce
- Mobile Advertising
- Summary trends to watch



Mobile... From Past to Future





Acknowledgments



Kleiner Perkins Caufield &
Byers



comScore



Morgan Stanley



How it all began...

From: iTunes Store [Do not reply@apple.com](mailto:Do_not_reply@apple.com)
Date: February 24, 2010 9:18:03 AM PST
To: niravani@globaleyeventures.com
Subject: Your application is Ready for SaleReply

Dear Global EyeVentures, Your application has been approved for sale on the App Store. Pending any application availability issues, your app will be Ready for Sale and live on the App Store within 24 hours. If your contracts are not in effect at this time, your application status will be Pending Contract. You may track the progress of your contracts in the Contracts, Tax, and Banking module in iTunes Connect.Application

Name: EyeXam Application

Version Number: 1.0



Everyday Questions in the Crazy World of Apps

- ✓ Do I need glasses??
- ✓ Can't read my emails!
- ✓ Do you know of a good doctor?
- ✓ Can you send me the office contact info?



350,000 apps and counting in practically every category



EyeXam – Self guided Vision Screening App

- Self Guided Vision Screening
- Patent Pending for Visual Acuity testing method
- EyeXam has 1M+ downloads!
- Apple rated as #2 in Top Free Medical category



**Upgrade your iPhone to an *EyePhone*
Download EyeXam Free App!**

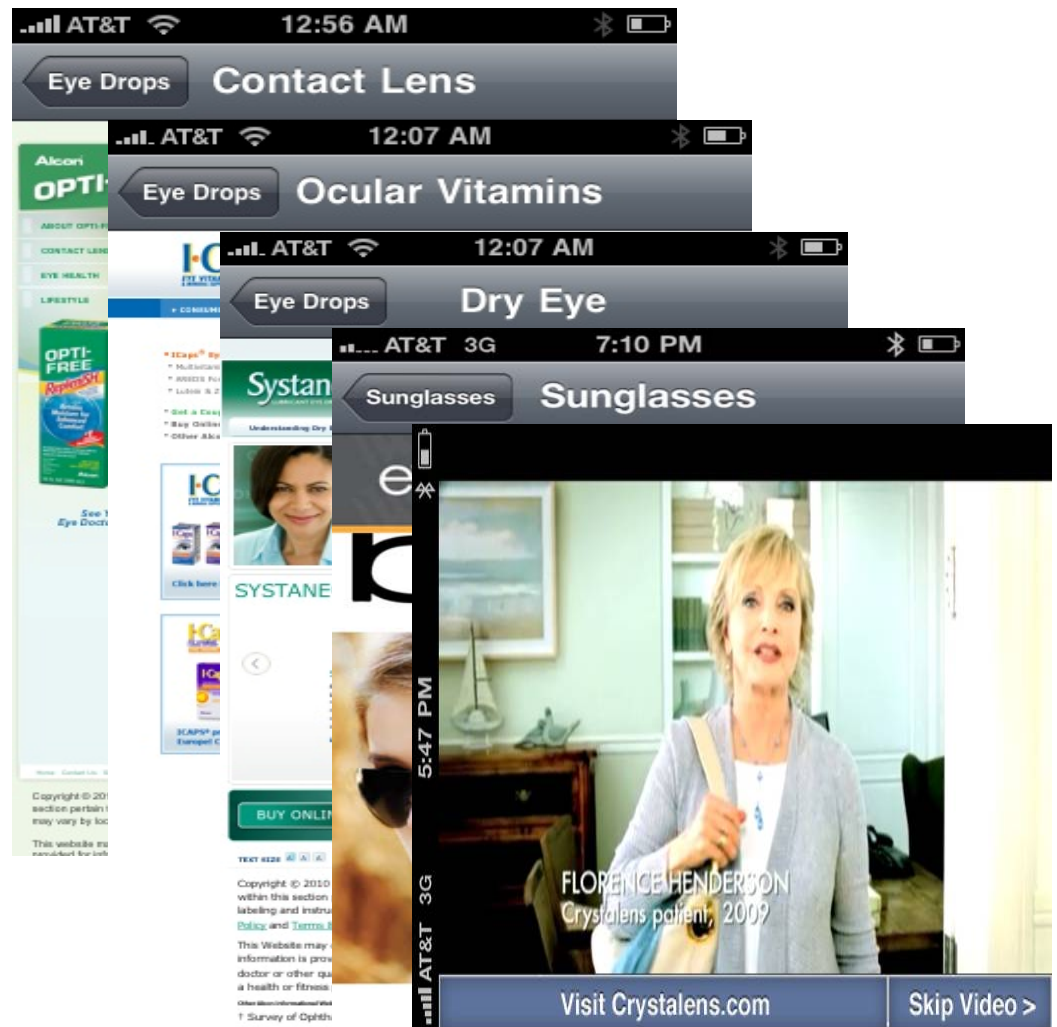


Average 60K ACTIVE users running EyeXam monthly

A collage of five overlapping screenshots from the EyeXam mobile application. The screenshots show various stages of the user experience: 1. The main menu with options like 'Visual Acuity', 'More Tests', 'Doctor', and 'Eye Ar & Con'. 2. A 'Near' vision test screen with a 'Which C did' prompt and a 'Main Menu' button. 3. A 'Macula Test' screen showing a grid of colored dots. 4. An 'Eye Conditions' screen with a search bar and a 'GO' button. 5. An 'Eye Doc Finder' screen with a search form for postal code, country, and state/province, and the 'Vision Source!' logo at the bottom.



Average 100K sessions/ month
Average session length: 5.2min



BB7000

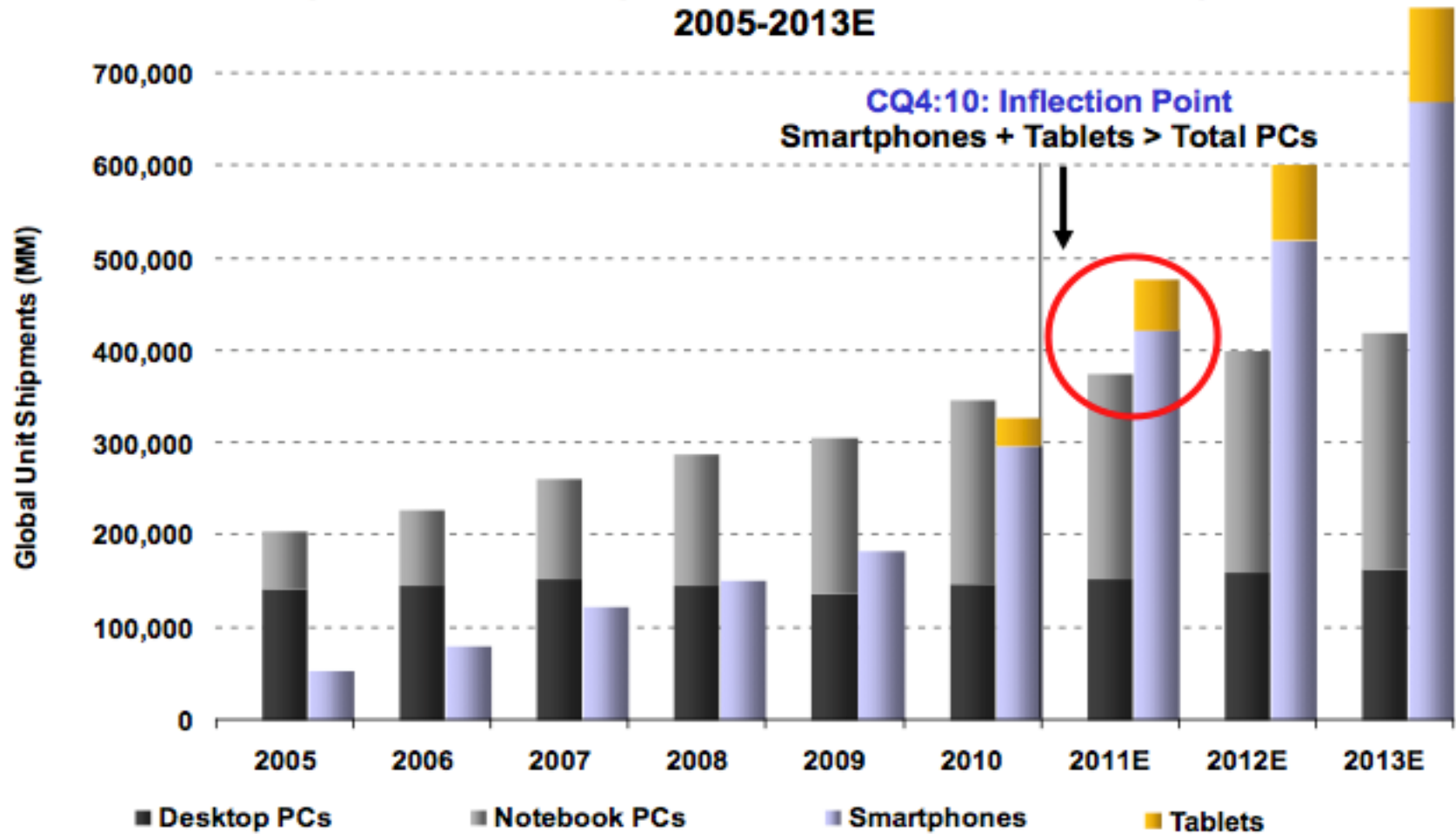


Mobile Platforms Hit Critical Mass...



Smartphone + Tablet exceeds PC shipments since Q4/10

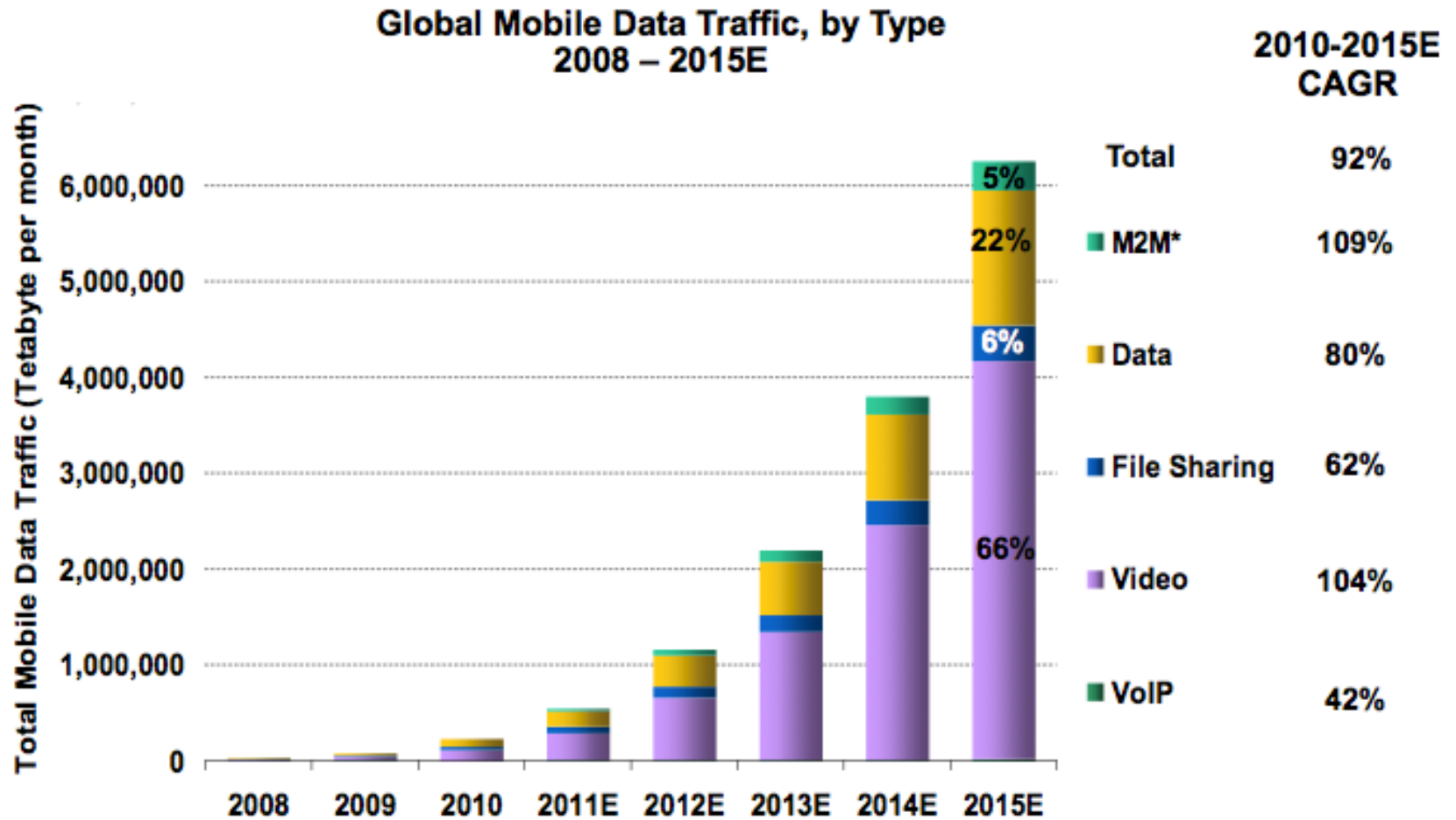
Global Unit Shipments of Desktop PCs + Notebook PCs vs. Smartphones + Tablets, 2005-2013E



Note: Notebook PCs include Netbooks. Source: Katy Huberty, Ehud Gelblum, Morgan Stanley Research. Data and Estimates as of 2/11



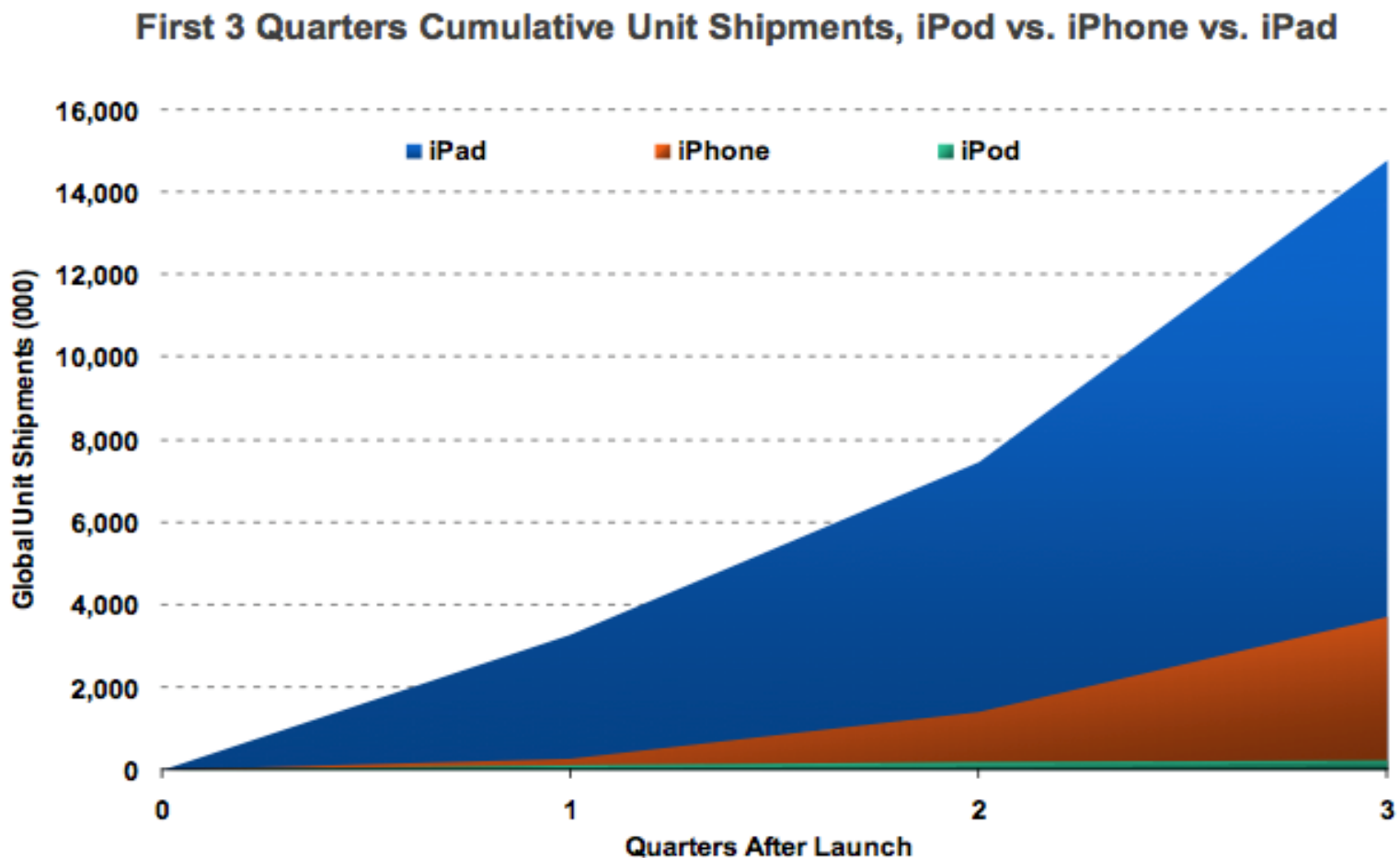
Global mobile data traffic should grow 26x over next 5 years



Source: Cisco Visual Networking Index (VNI) Global Data Traffic Forecast, 2010-2015



iPods changed the media industry
iPhones ramped even faster
iPad growth has been phenomenal

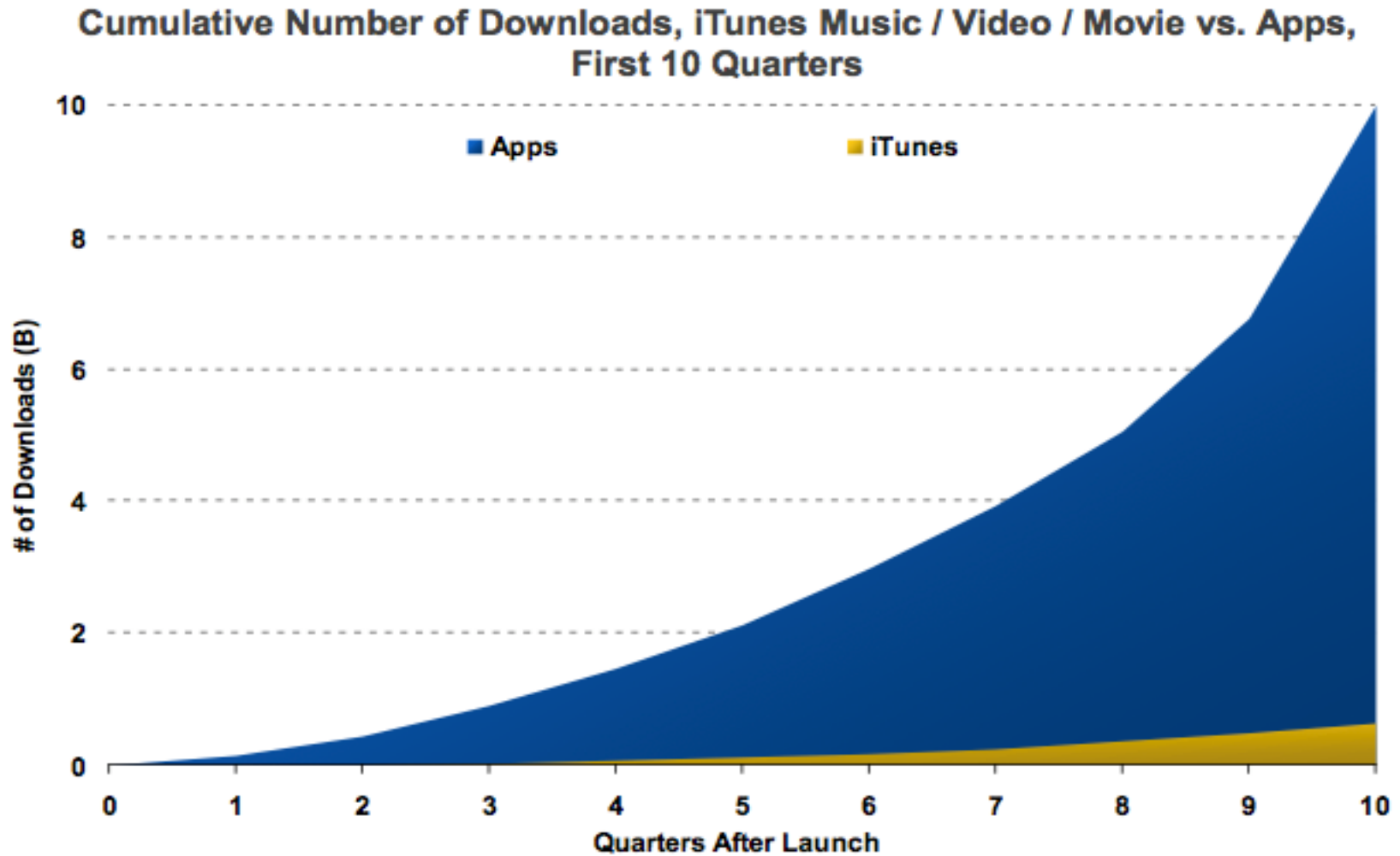


Source: Apple.



iTunes changed the media industry

App store growth has been beyond imagination

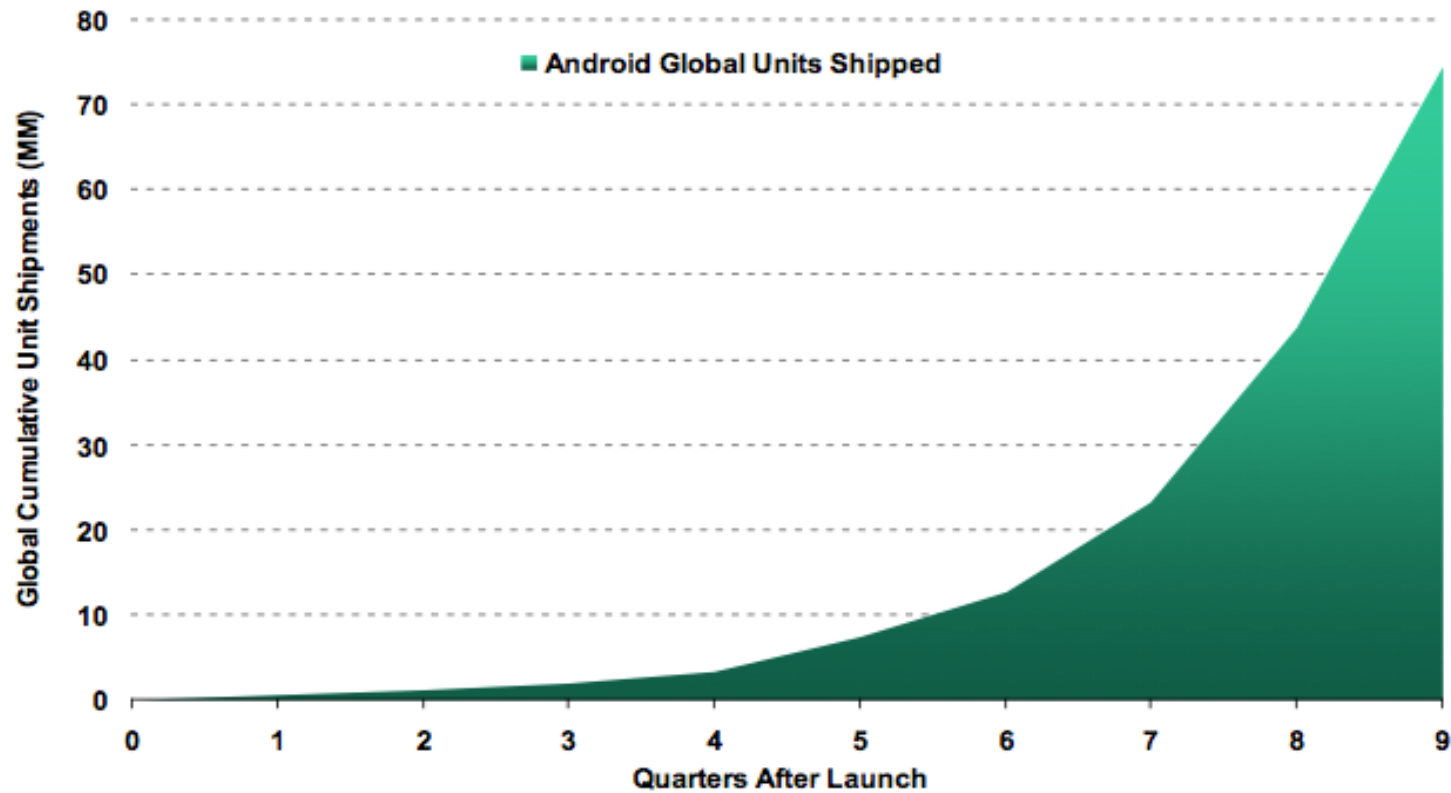


Source: Apple.



Android hits critical mass

First 9 Quarters Cumulative Android Unit Shipments



Source: Gartner.

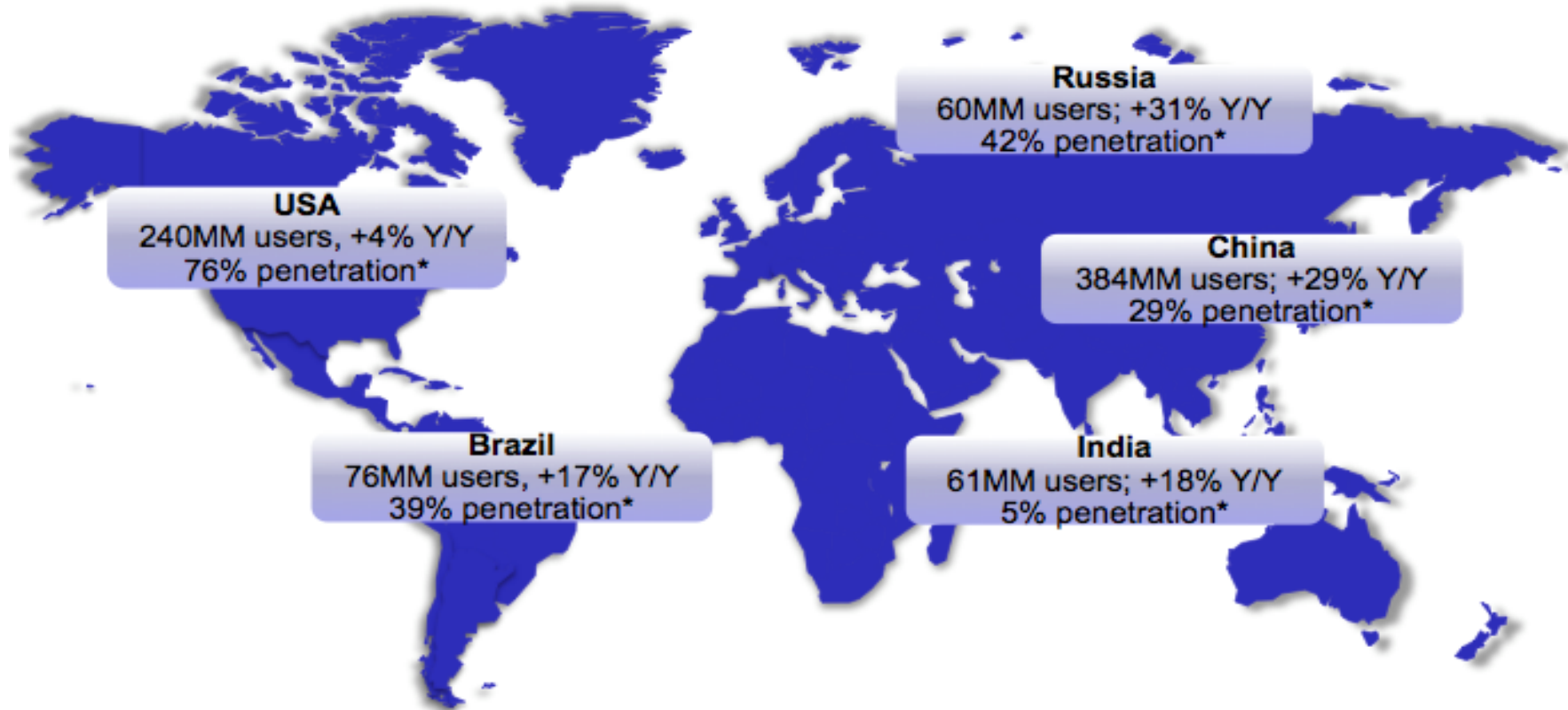


Mobile is Global...



China, USA, Russia, Brazil, India > 46% Internet Users

**2009 – 1.8B Global Internet Users, +13% Y/Y⁽¹⁾;
18.8T Minutes Spent, +21% Y/Y⁽²⁾**



Note: *Penetration is per 100 inhabitants.

Source: 1) Internet user stats per International Telecommunications Union; 2) time spent data per comScore global 12/09.



Social Networking Accelerating Growth of Mobile



Strong Mobile trends for leading social companies

facebook

- 200MM mobile active users vs 50M in 9/09

twitter

- 253MM visitors
 - 50% of total active users

SHAZAM

- 100MM mobile users



- Adding 3MM users per month
 - 50% are mobile subscribers



Emerging Social Network...More to come



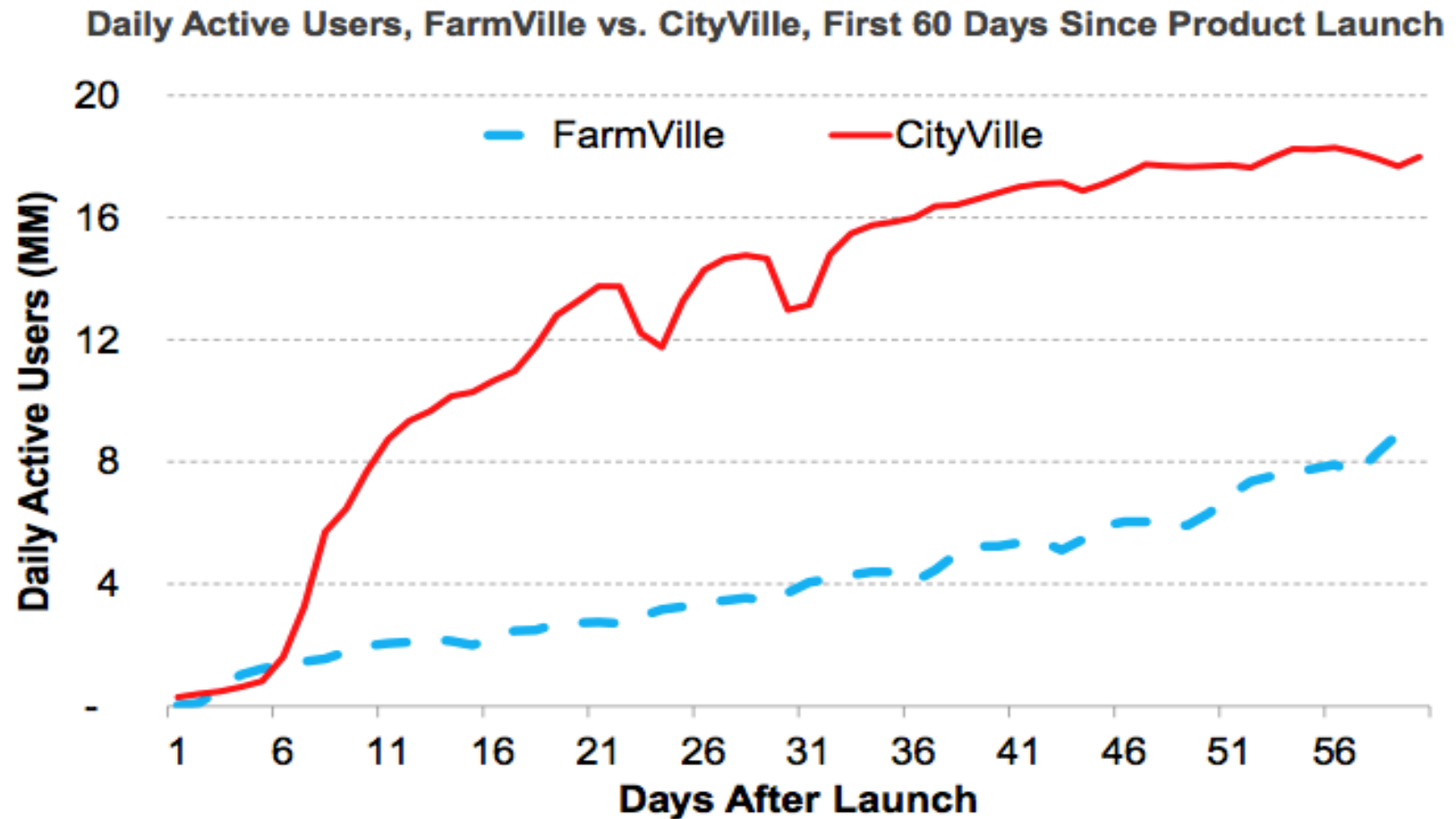
- Commerce
 - 51MM subscribers
 - +25x Y/Y



- Gaming
 - 130MM+ users
 - +15% Y/Y



Great social products can ramp quickly!

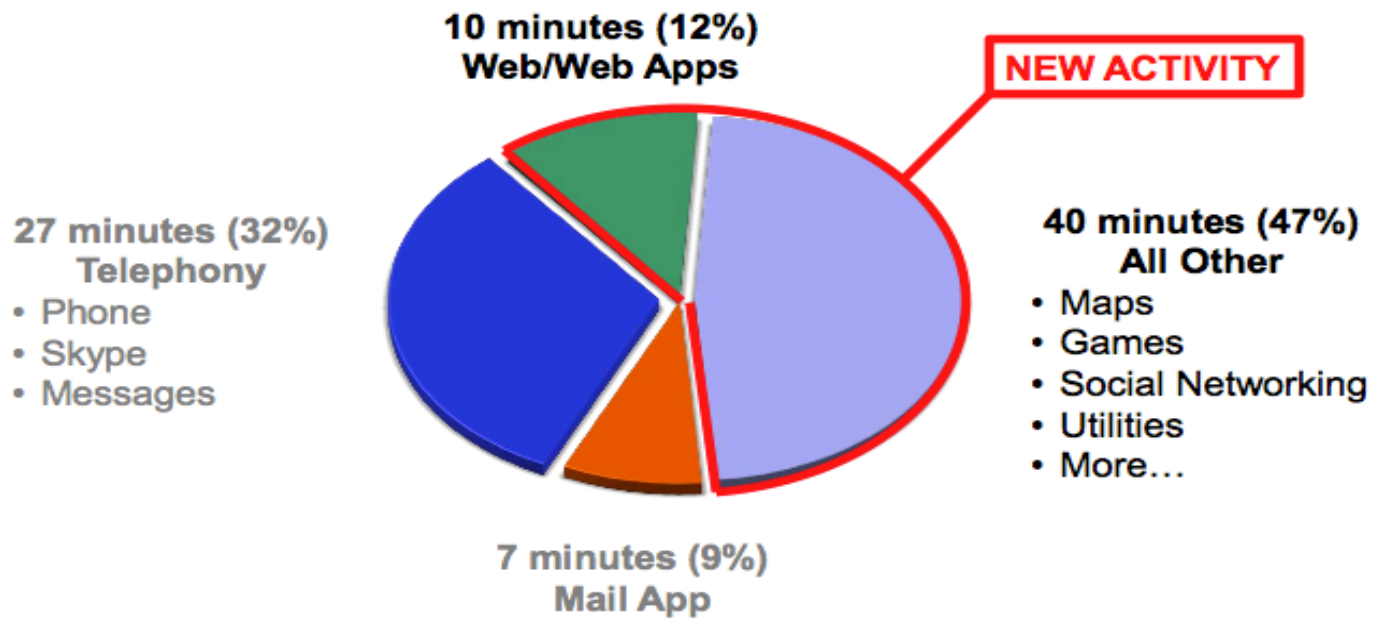


Source: Zynga. Note that FarmVille launched in 6/09, CityVille launched in 12/10.



Mobile Usage

Average Time Spent on Various Mobile Functions, 1/11



Source: AppsFire, 1/11.
Note that Android users show a higher % browsing activity.

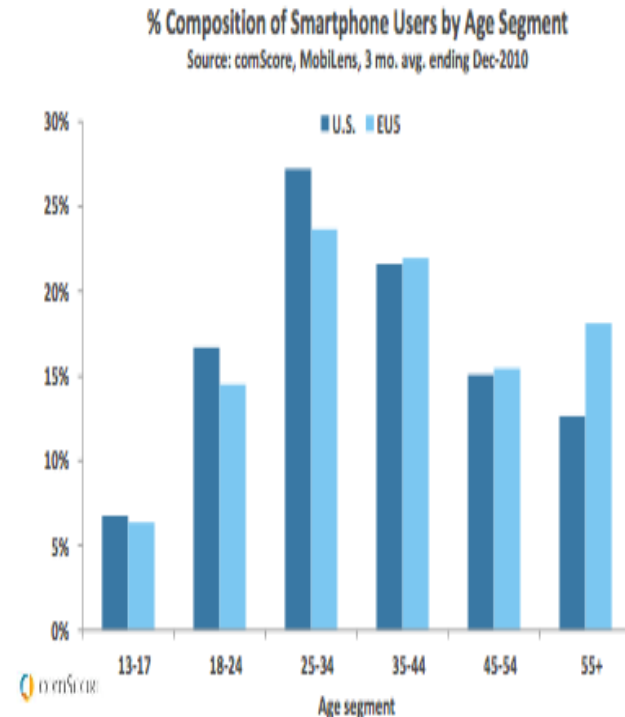


Smartphone Users by Age

The comScore 2010 Mobile Year in Review

FEBRUARY 2011

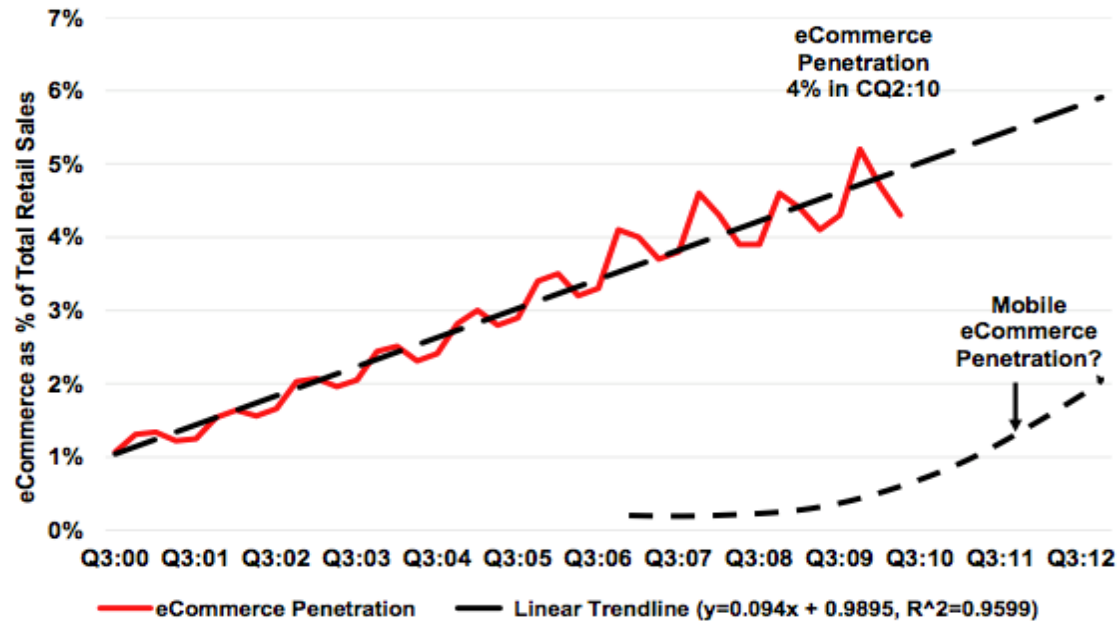
- Searching for health information, is now the third most popular online activity for all internet users 18 and older
- The fastest growth has come from internet users 74 and older





Mobile eCommerce gaining share

USA eCommerce % Share⁽¹⁾ of Total Retail Sales, CQ3:00-CQ4:12E



Note: (1) Adjusted for eBay by adding back eBay US gross merchandise volume;
Source: US Dept. of Commerce (CQ2:10), Morgan Stanley Research.

- Looking ahead to 2014, over three billion adults around the world will be equipped to conduct transactions via mobile
- Nearly 40% of smart-phone users have bought something using their mobile devices in the last six months



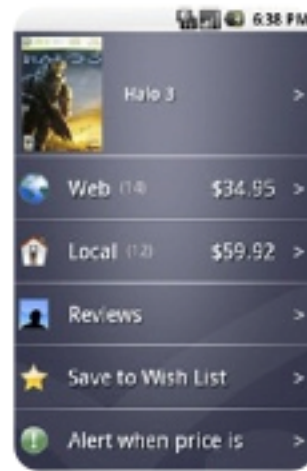
Mobile revolutionizing commerce with constant product improvements

- Location based services
- Transparent pricing
- Discounted offers

Location-Based Services
Shopkick iPhone App
Finds deals and offers
in your area



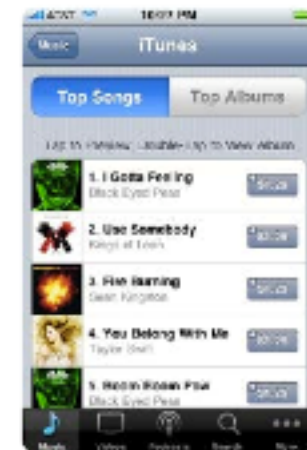
Transparent Pricing
ShopSavvy Android App
Comparison shopping among
online + local stores



Discounted Offers
Groupon iPhone App
Local Services
Up to 90% Off



Immediate Gratification
iTunes Store on iPhone
Music / video / apps
delivered wirelessly





Mobile Advertising...Huge Promise!

Mobile ads-
from text alerts and
banner ads to Web
sponsorship and
apps, is on the rise
(\$913 million in 2009 to
\$13.3 billion in 2013)










Google Paid Clicks & Cost-Per-Click continue to accelerate

	CQ4:09	CQ1:10	CQ2:10	CQ3:10	CQ4:10
Gross Advertising Revenue (\$MM)	\$6,465	\$6,475	\$6,562	\$7,032	\$8,167
<i>Y/Y Growth</i>	17%	21%	23%	22%	26%
<i>Q/Q Growth</i>	12%	0%	1%	7%	16%
Aggregate Paid Clicks (MM)	12,401	12,909	12,651	13,157	14,669
<i>Y/Y Growth</i>	13%	15%	15%	16%	18%
<i>Q/Q Growth</i>	9%	4%	-2%	4%	11%
Cost per Click (CPC - \$)	\$0.52	\$0.50	\$0.52	\$0.53	\$0.56
<i>Y/Y Growth</i>	4%	6%	7%	6%	7%
<i>Q/Q Growth</i>	3%	(4%)	3%	3%	4%

Evolution of Internet & Revolution of Mobile

Mobile Internet Next Major Computing Cycle

<i>Mainframe Computing</i> 1950s	<i>Mini Computing</i> 1960s	<i>Personal Computing</i> 1980s	<i>Desktop Internet Computing</i> 1990s	<i>Mobile Internet Computing</i> 2000s
				

Morgan Stanley



Summary Trends to Watch

- Real-time connectivity/24x7/ in palm of hand
- Device and data plan pricing falling
- Networks and devices improving
- Location/preferences/behavior
- Social and reward driven marketing
- Access everywhere- “stuff” in cloud
- Explosion of apps and monetization
- “Gamification” is the ultimate way to engage a new generation of audience



Thank You!

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