

Table of Contents

Executive Summary.....	1
The Four Horsemen.....	2
Battlefronts.....	3
The Web: Mobile's Wild West	3
Deep Linking	4
Google Now.....	5
Just a Moment.....	6
Hub & Spoke.....	7
The Endgame: A \$7 Trillion Market.....	8
M-Commerce	9
The Wild Card: Wearables.....	10
The Facebook Effect	11
Conclusion: The Mother of Invention.....	12
About BIA/Kelsey	14
About the Author	14
Appendix: BIA/Kelsey Mobile Forecast	15
Appendix II: Video Slide Companion.....	17

Table of Figures

Figure 1 - Local Share of Mobile Ad Spend by Format.....	15
Figure 2 - U.S. Local Search Market: Mobile vs. Desktop	16
Figure 3 - U.S. Local Search Volume: Mobile vs. Desktop.....	16