

2011 CES Trends to Watch

Shawn Dubravac
@twoopinions

Presentation Available at:
<http://s.dbr.vc/fUW9SX>

2008

2009

2010

2011

2008 CES

- Incremental improvements and up
- 4500+ mobile devices shown
- Clear future expected
- Battery life improved



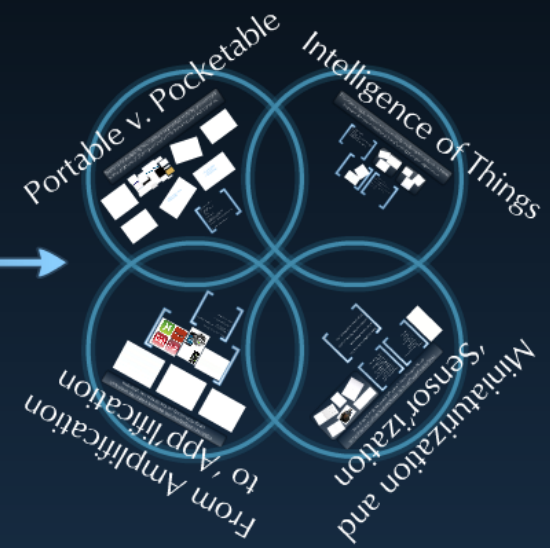
2009 CES

- Vision for a wireless future
- More mobile devices, more and smaller
- Embedded in cars
- Fuel efficiency improved



2010 CES

- Beyond 4G: Network 2.0
- Content, Services and Cloud Computing
- Networked, not just networked
- Data, services and applications start to shape the interface



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2009

2010

Improvements add up
and experiences
solves
ned



- "Green" as a purchase factor
- Evolving command, control and display
- Embedded Internet
- (No) strings attached



- Beyond HD: Tomorrow's TV
- Content: Connecting and Corraling
- New Screens Find the Sweet Spot
- Customization & Personalization:
Empower the Individual

2008



- Incremental improvements add up
- 360° solutions and experiences
- Distribution evolves
- Mobility redefined



2009



- “Green” as a purchase factor
- Evolving command, control and display
- Embedded Internet
- (No) strings attached



2010



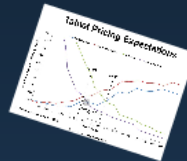
- Beyond HD: Tomorrow's TV
- Content: Connecting and Corraling
- New Screens Find the Sweet Spot
- Customization & Personalization: Empower the Individual



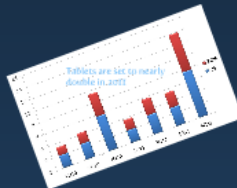
2011

Portable v. Pocketable

Demand for portability has created a segmented mobility environment with a plethora of offerings across form factors and use-case scenarios.



Device Type	Q1	Q2	Q3	Q4
Smartphones	10%	15%	20%	25%
Tablets	5%	10%	15%	20%
Smart TVs	3%	5%	7%	10%
Smart Home Appliances	2%	3%	4%	5%
Smart Wearables	1%	2%	3%	4%
Smart Connected Cars	0.5%	1%	1.5%	2%
Smart Connected Homes	0.5%	1%	1.5%	2%
Smart Connected Cities	0.5%	1%	1.5%	2%
Smart Connected Industries	0.5%	1%	1.5%	2%
Smart Connected Agriculture	0.5%	1%	1.5%	2%
Smart Connected Transportation	0.5%	1%	1.5%	2%
Smart Connected Energy	0.5%	1%	1.5%	2%
Smart Connected Healthcare	0.5%	1%	1.5%	2%
Smart Connected Education	0.5%	1%	1.5%	2%
Smart Connected Retail	0.5%	1%	1.5%	2%
Smart Connected Manufacturing	0.5%	1%	1.5%	2%
Smart Connected Logistics	0.5%	1%	1.5%	2%
Smart Connected Government	0.5%	1%	1.5%	2%
Smart Connected Defense	0.5%	1%	1.5%	2%
Smart Connected Aerospace	0.5%	1%	1.5%	2%
Smart Connected Maritime	0.5%	1%	1.5%	2%
Smart Connected Space	0.5%	1%	1.5%	2%

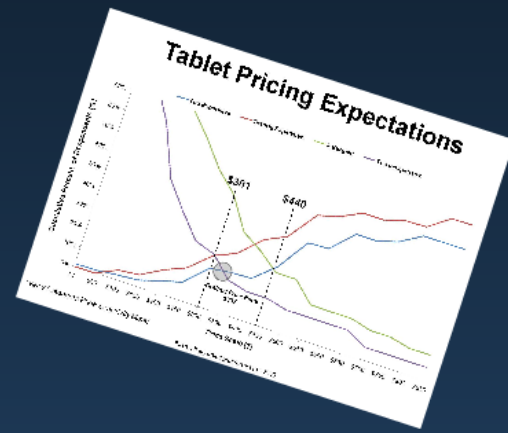


- Things To Look For in 2013:
 - Differentiation
 - Form Factor Innovation
 - OS
 - Price
- User Case Scenarios
 - Evolution of Mobile Product Categories (Smartphones, Tablets, etc.)
 - Accessories to feature, adding value, etc.
 - Oh, and don't forget the customer

Intelligent processors, apps, and operate mo

Tablet v. Pock

Demand for portability has created a segmented mobility environment with a plethora of offerings across form factors and use-case scenarios.



Browsing the Internet	94%
Email	84%
Watching video	73%
Reading e-books/periodicals	70%
Gaming	68%
Viewing office documents	67%
Listening to music	63%
Calendar/contacts management	61%
Social networking	61%
Online purchasing	57%



The Void Battleground in the Screen Spectrum



TOSHIBA

Leading Innovation >>>



VIZIO

htc



LG

RAMOS



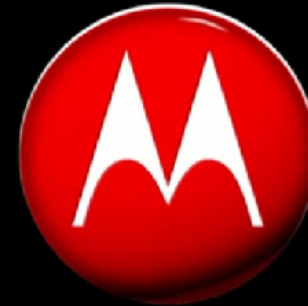
ViewSonic®



BlackBerry™



NVIDIA



lenovo

CES 2011

ASUS®



SAMSUNG

msi

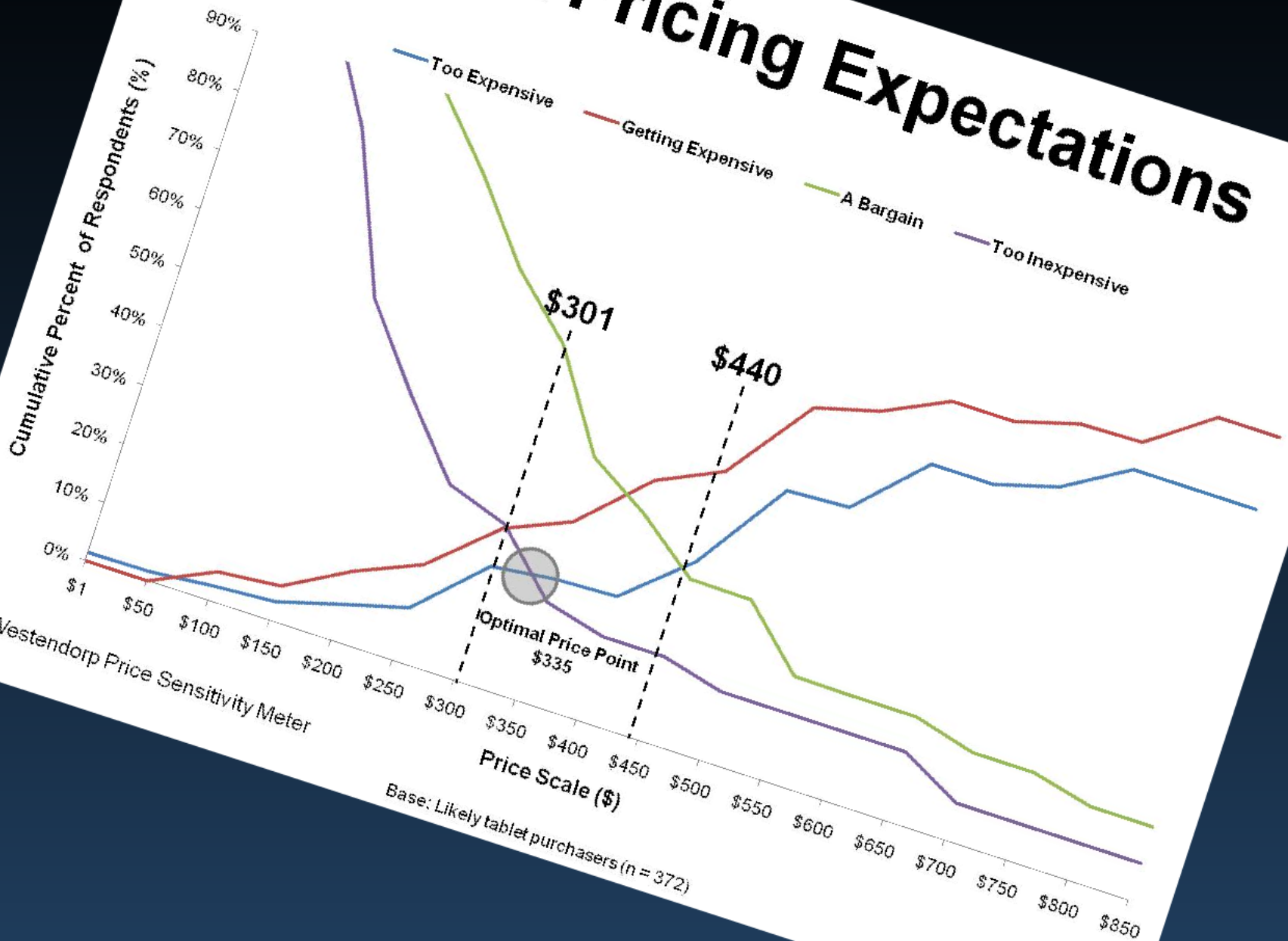


Microsoft®



NEC

Tablet Pricing Expectations

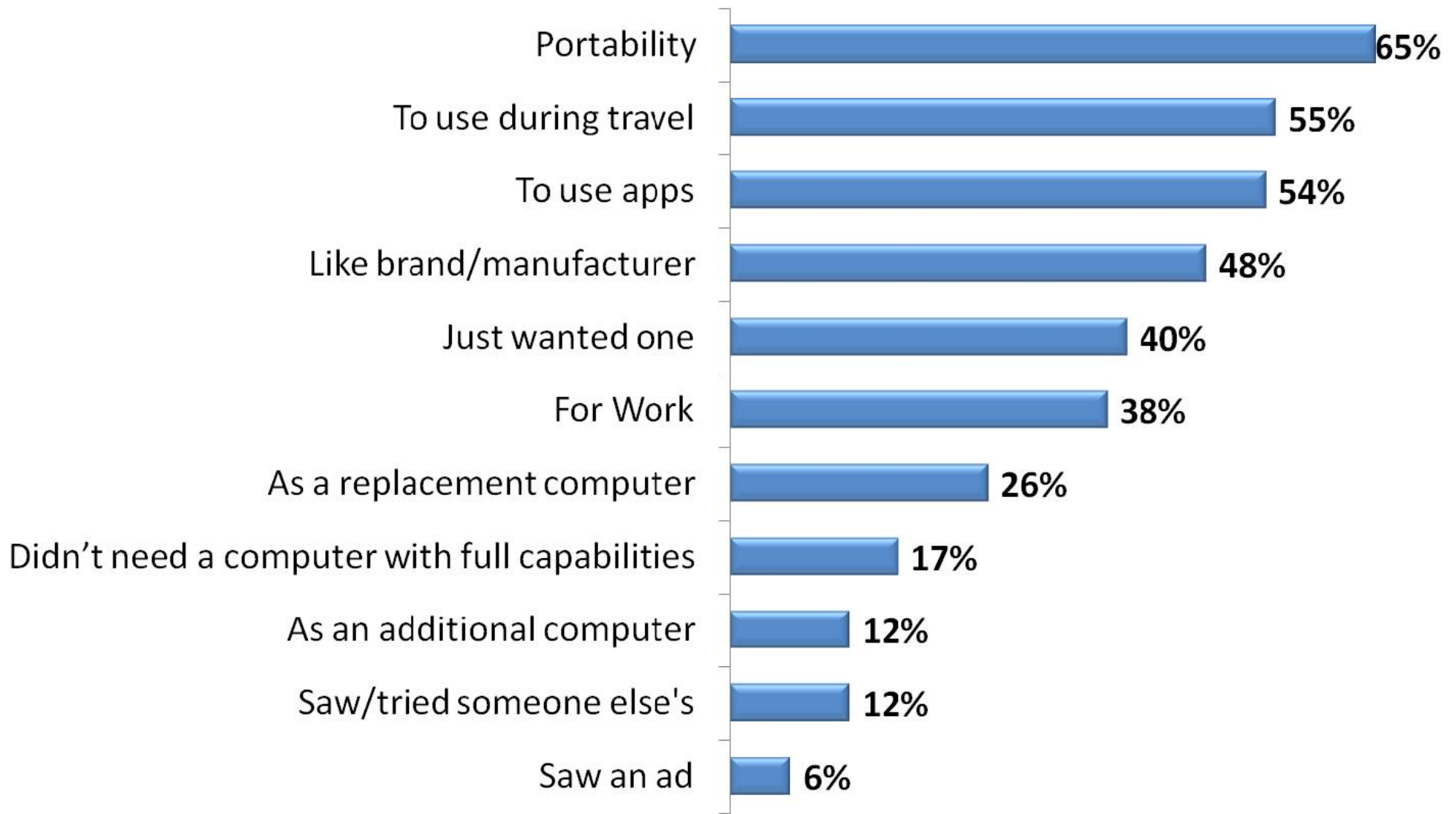


*Van Westendorp Price Sensitivity Meter

Base: Likely tablet purchasers (n = 372)

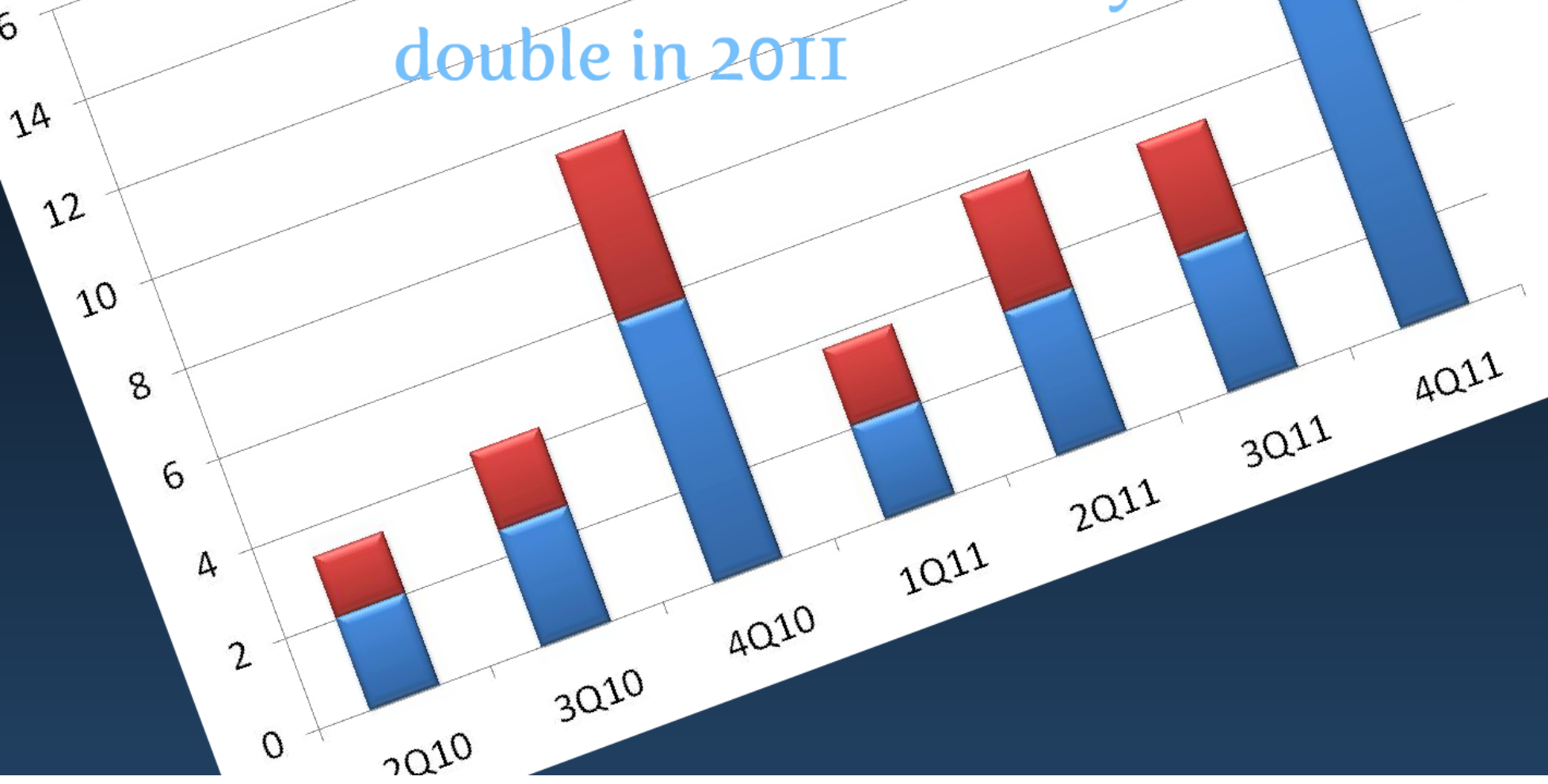
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Enthusiasts' Reasons For Purchase

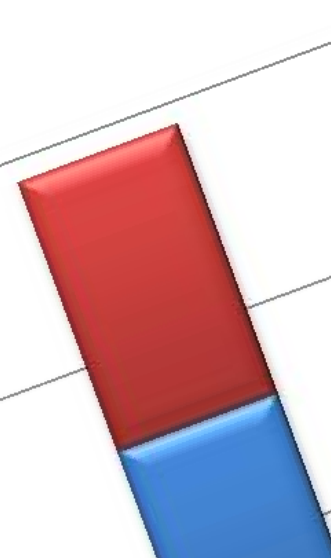
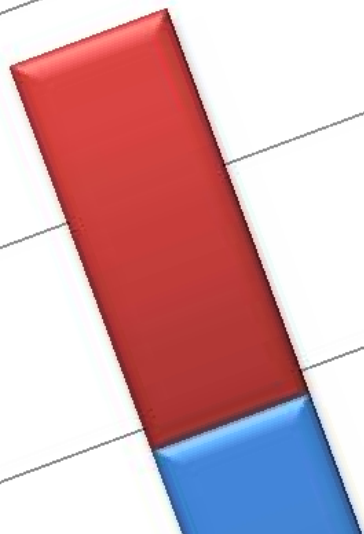


Q. Which of the following, if any, are reasons you originally purchased your tablet computer?
Base: CNET Technology Enthusiasts who own a tablet (n = 82)

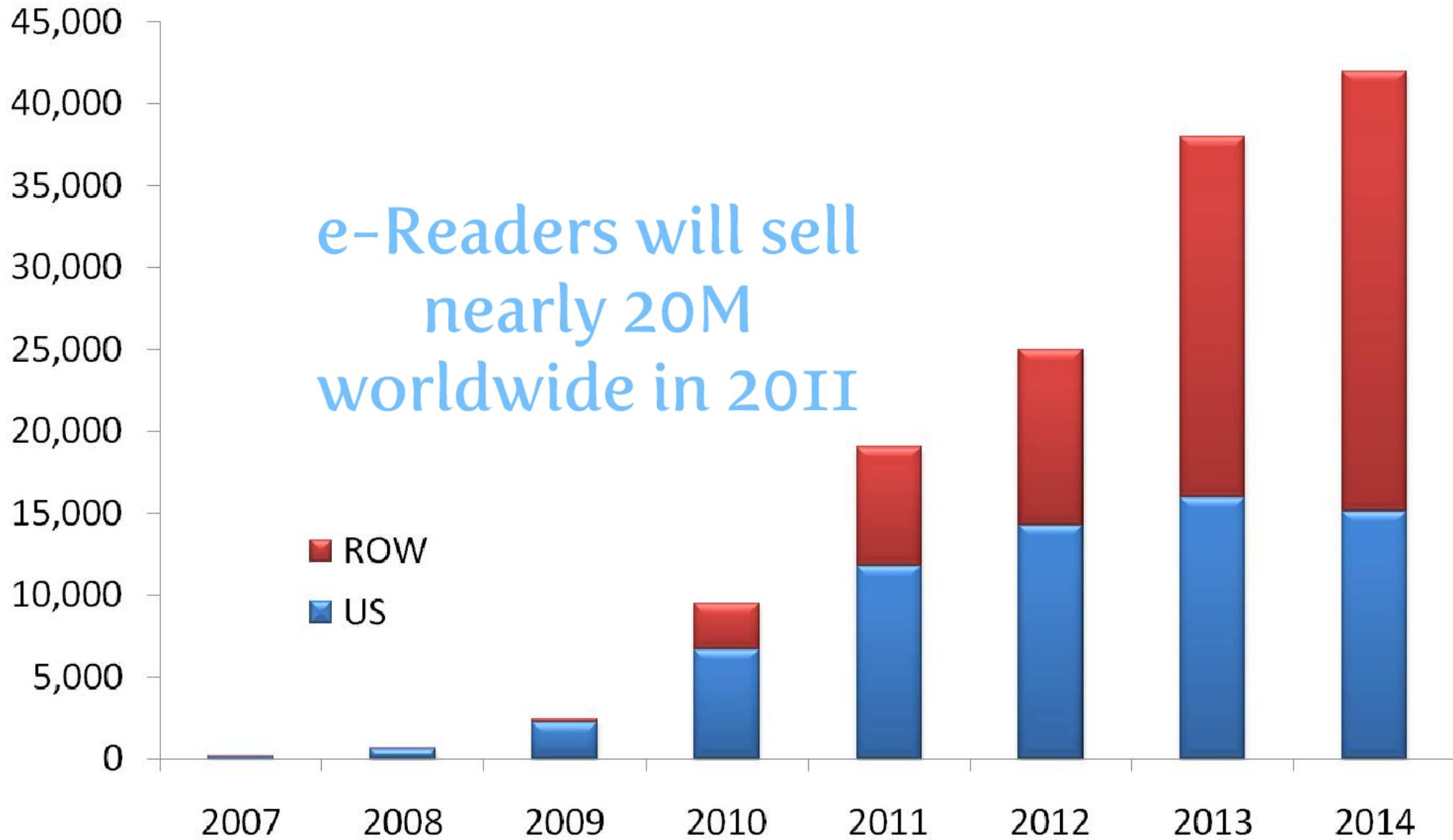
Tablets are set to nearly double in 2011



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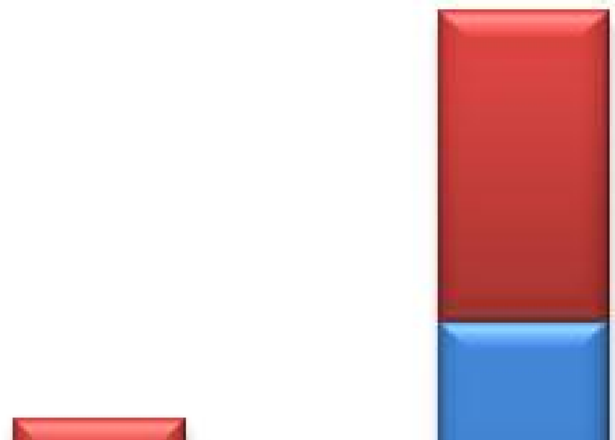
e-Readers will sell
nearly 20M
worldwide in 2011



e-Readers will sell
nearly 20M
worldwide in 2011

■ ROW

■ LIC



Things To Look for at 2011 CES

1) Differentiation

- form factor (screen size)
- OS
- Pricing

2) use-case scenarios

3) Integration of sensing technologies (accelerometers, cameras, etc)

5) close cousins (e-Readers): adding color, games, etc

oh...and don't forget the ecosystem

Intelligence of Things

Processors, apps, and online connectivity enable devices to collect data and operate more intuitively, transforming the user experience.

What Makes it Possible

- Sensors
- Connecting Internet, Bluetooth, ZigBee
- Computing Power
- Network Effect of App Ecosystem



Things that are smart can
interact with the environment
to help us do things better, faster,
and more efficiently. This is the
intelligence of things.

Intelligence of T

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Things To Look for at 2011 CES

- 1) 171M Connected Devices and Counting
- 2) Smartphones Become the Point of User Interface
- 3) Machine-to-Machine communication
- 4) Creation of data

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Miniaturization and 'Sensor'ization

Sensors are getting smaller, less expensive, and more ubiquitous, empowering new offerings, services, and possibilities.



Sensors

- capacitive and resistive touchscreens
- microphone
- camera
- accelerometer
- gyroscope
- compass
- pressure

Sensors in Everyday Life

- tire pressure sensor
- reverse cameras
- parking/proximity sensors
- airbag deployments
- hill-side parking assist (accelerator)
- image stabilization
- anti-tilt
- harddrive integrity



Things to Look for at the 2011 CES

- 1) Combinatorial Innovation
- 2) sensors used for different purposes
- 3) Companies responding to Users

to

Automation

Sensorization

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Sensors

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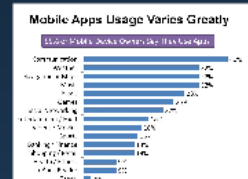


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From Amplification to 'App'lification

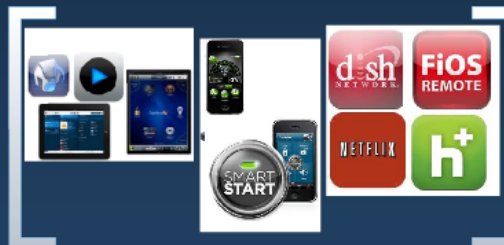
OEMs are changing the user experience with a focus on apps integration driving personalization and utilization



Consumer Perspectives on Apps and CE

Percent - Strongly Agree / Agree

Statement	Percent
Smartphones are essential to my life	90
Smartphones are essential to my business	75
Smartphones are essential to my education	70
Smartphones are essential to my social life	65
Smartphones are essential to my entertainment	60
Smartphones are essential to my work life	55
Smartphones are essential to my family life	50
Smartphones are essential to my health	45
Smartphones are essential to my safety	40
Smartphones are essential to my security	35
Smartphones are essential to my privacy	30
Smartphones are essential to my identity	25
Smartphones are essential to my reputation	20
Smartphones are essential to my success	15
Smartphones are essential to my happiness	10
Smartphones are essential to my well-being	5

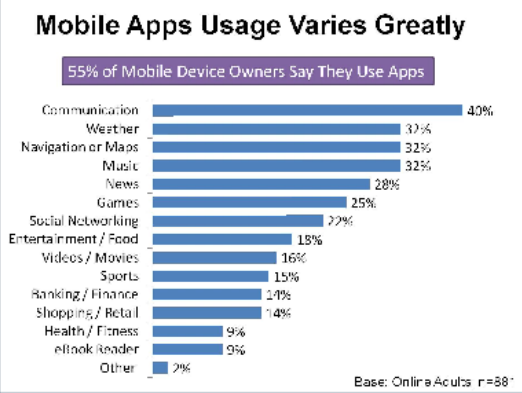
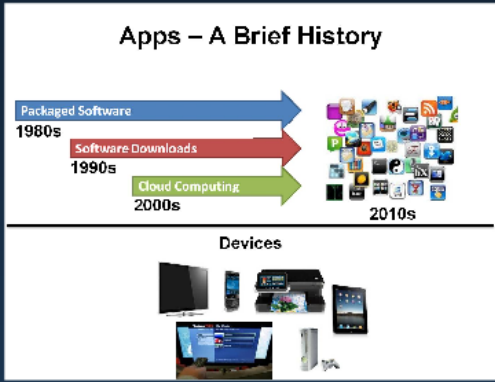


Ubiquitous, possibilities.

App'lification

'App'lification

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Consumer Perspectives on Apps and CE

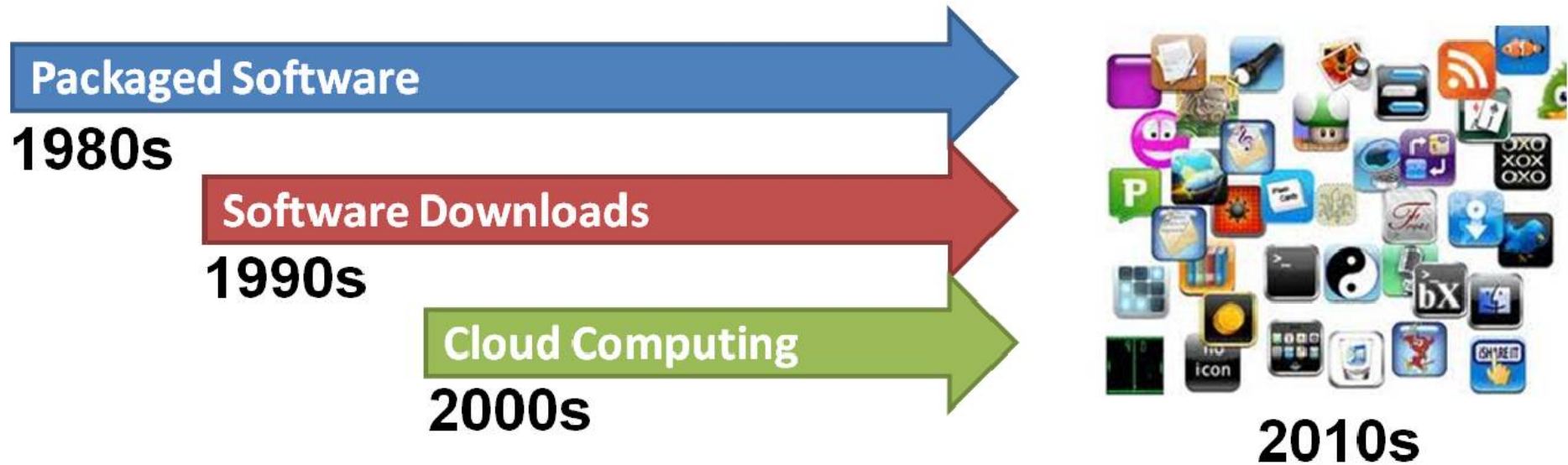
Percent - Strongly Agree / Agree

Statement	%
I want apps to work across all types of mobile devices.	43%
I am overwhelmed by the number of apps available.	32%
Apps remove the need to buy separate CE devices.	26%
I'd like a better way to organize my apps.	22%
I'm willing to pay for apps.	20%

Base: Online Adults, n=88*



Apps – A Brief History

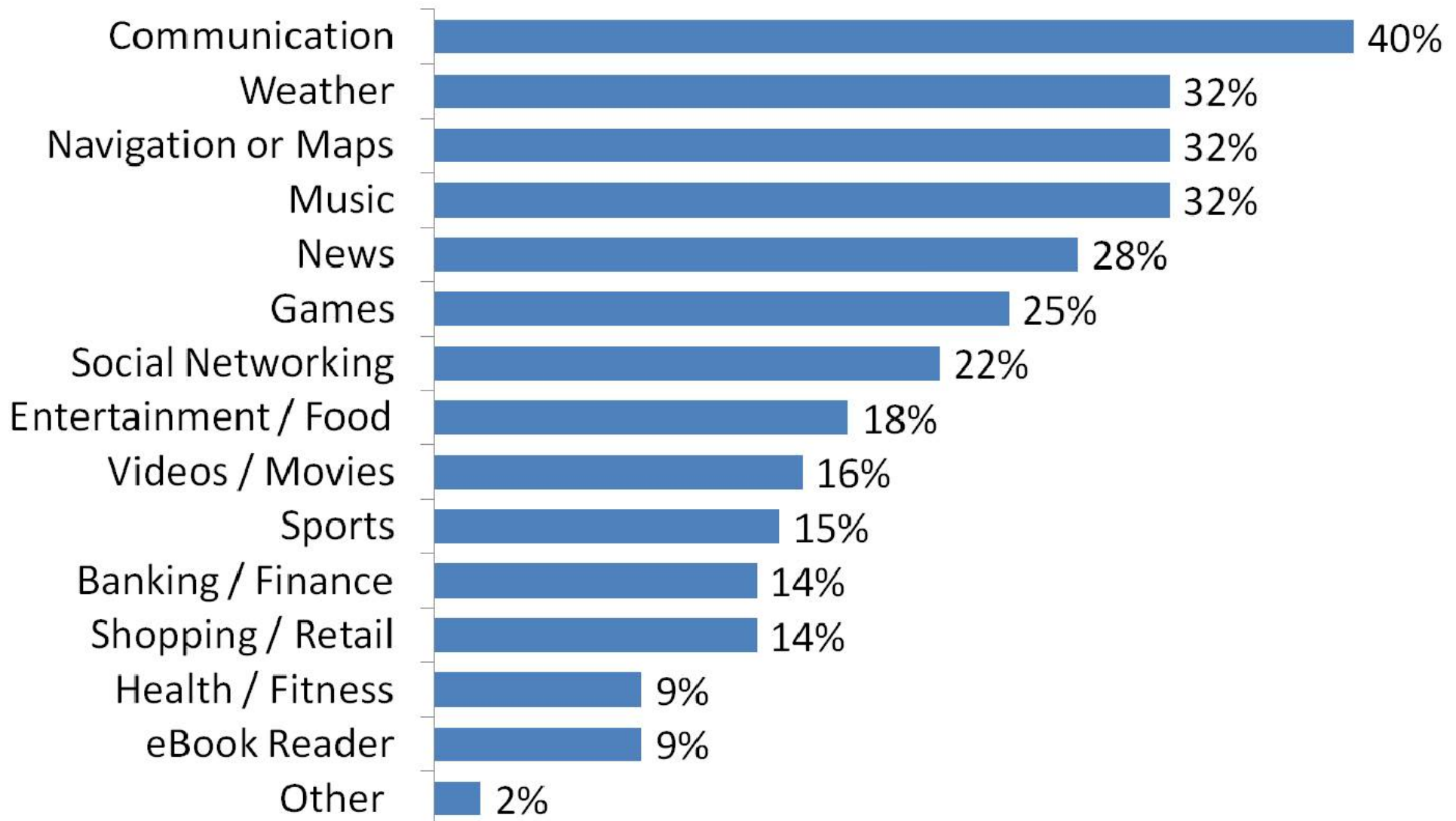


Devices



Mobile Apps Usage Varies Greatly

55% of Mobile Device Owners Say They Use Apps

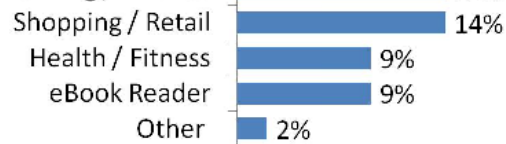


Base: Online Adults; n=881

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Things to Watch for at 2011 CES

- 1) Hardware that requires apps and apps that require hardware

Things to Watch for at 2011 CES

- 1) Hardware that requires apps and apps that require hardware
- 2) shifting R&D budgets
- 3) monetization plans

2011

Portable v. Pocketable

Intelligence of Things

From Amplification
to 'App'lification

Miniaturization and
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o Trends

Shawn Dubravac
@twoopinions

Shawn DuBravac, CFA
Chief Economist & Director of Research

shawnd@CE.org

202.556.3434

@twoopinions

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