

The Rise of Tablets

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Vice President, Clients and Displays

- Client Diversity
- PCs vs. Tablets vs. Netbooks vs. Smartphones vs.
- Device Cannibalization
- Tablet Market Share and Forecast
- Essential Guidance



PC		<ul style="list-style-type: none">▪ x86 CPU▪ “Desktop OS”
Netbook (aka “mininotebook”)		<ul style="list-style-type: none">▪ Atom/Low capability CPU▪ 7”-12” Screen▪ Clamshell form factor
Tablet PC		<ul style="list-style-type: none">▪ “Desktop OS”▪ 7”-12” Screen▪ Slate or convertible
Media Tablet		<ul style="list-style-type: none">▪ Mobile OS▪ Slate form factor▪ >5” Screen
Smartphone		<ul style="list-style-type: none">▪ Mobile OS▪ Voice focused▪ ≤5” screen

Client Device Choices



Client Device Choices



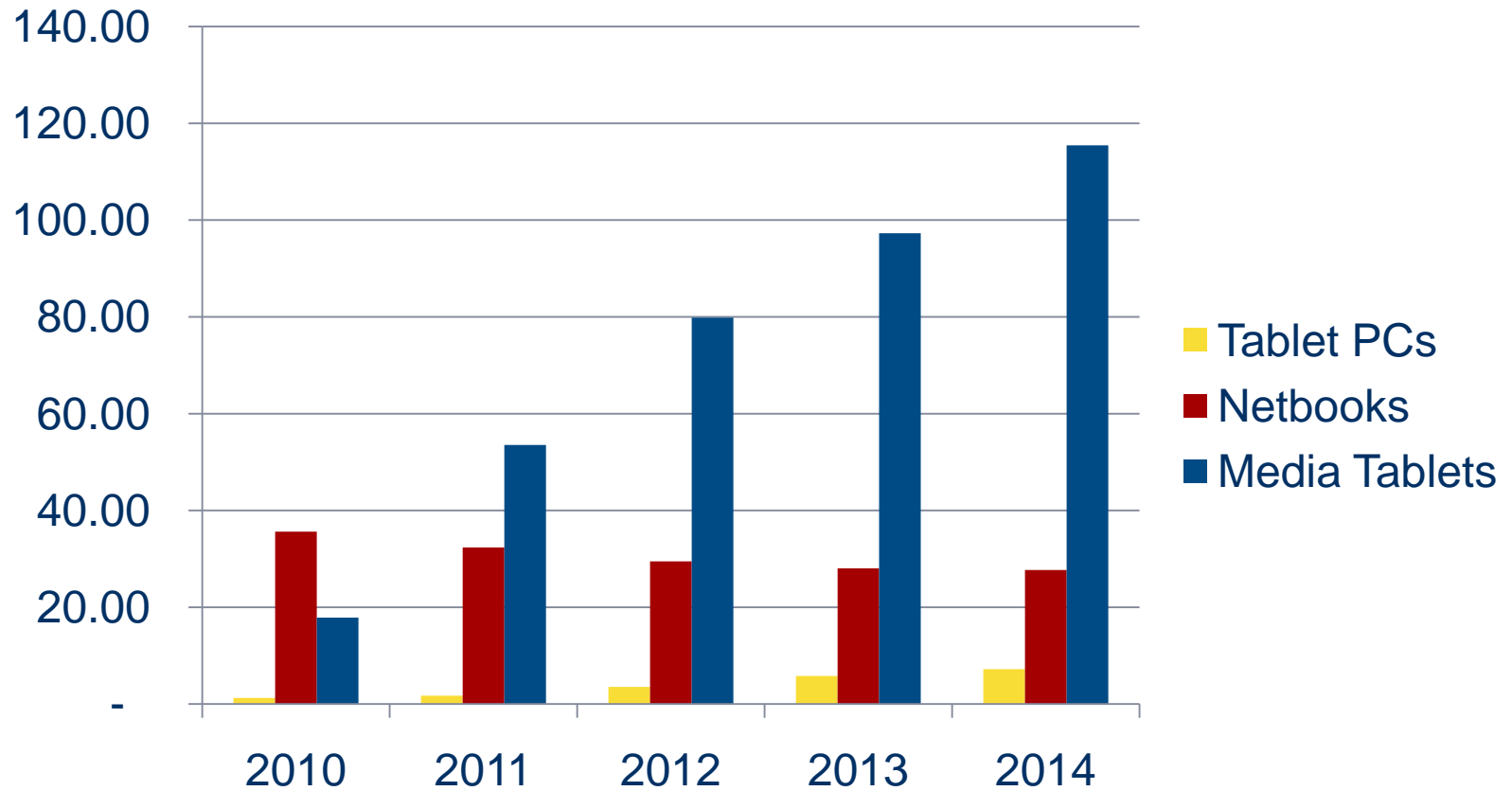
Different Devices at Different Times

- Situation
- Location
- Workload

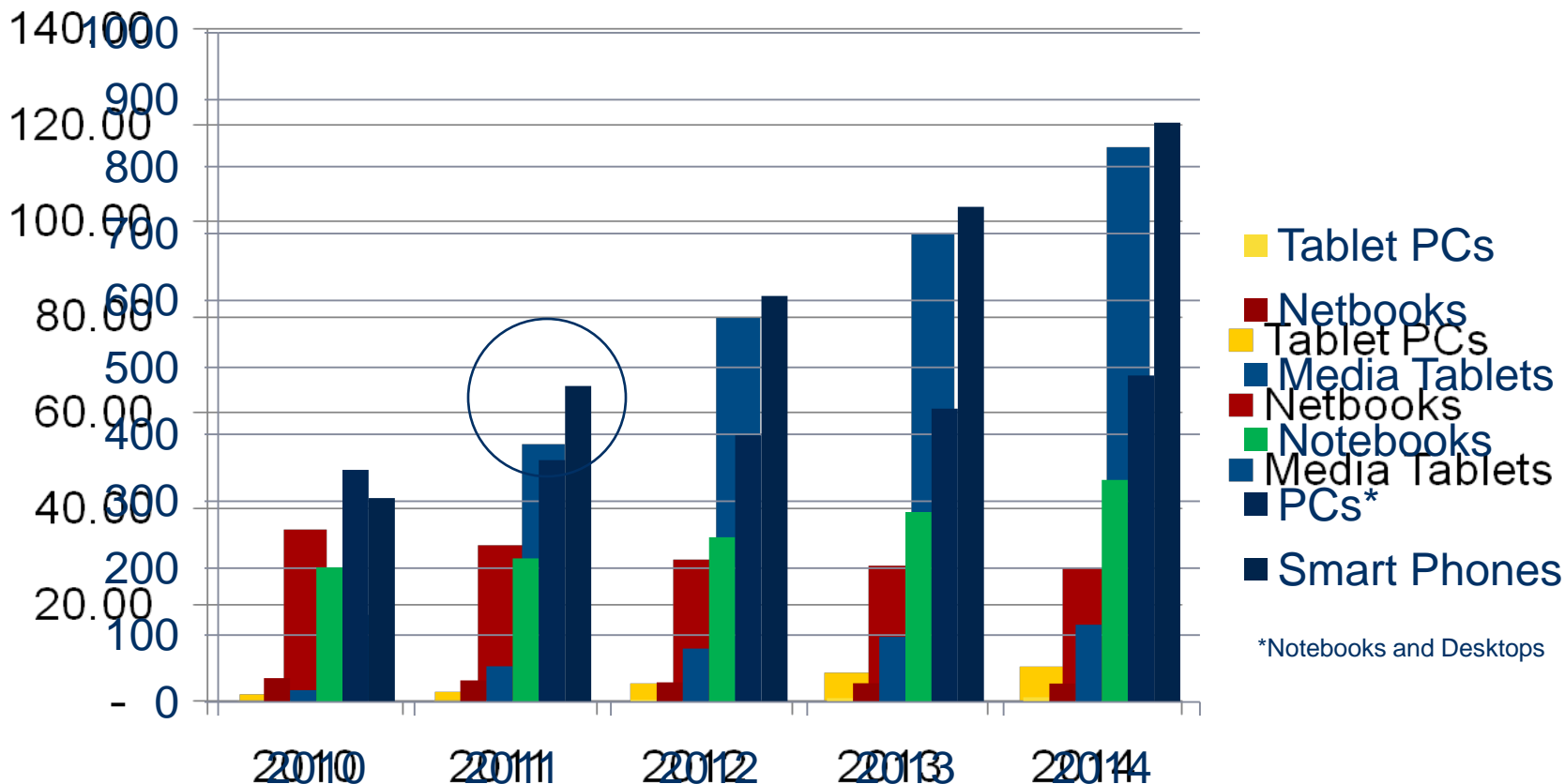
4.8 Devices/person WW
6.6 Devices/person US



The Forecast



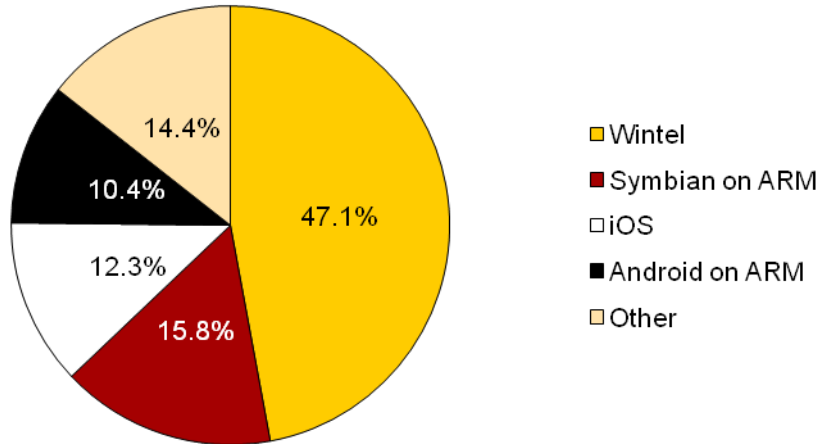
The Forecast



*Notebooks and Desktops

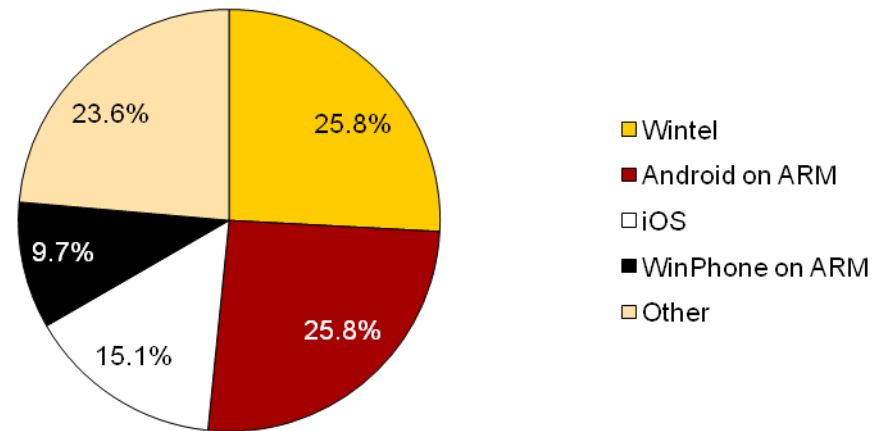
Platform Diversity

2010



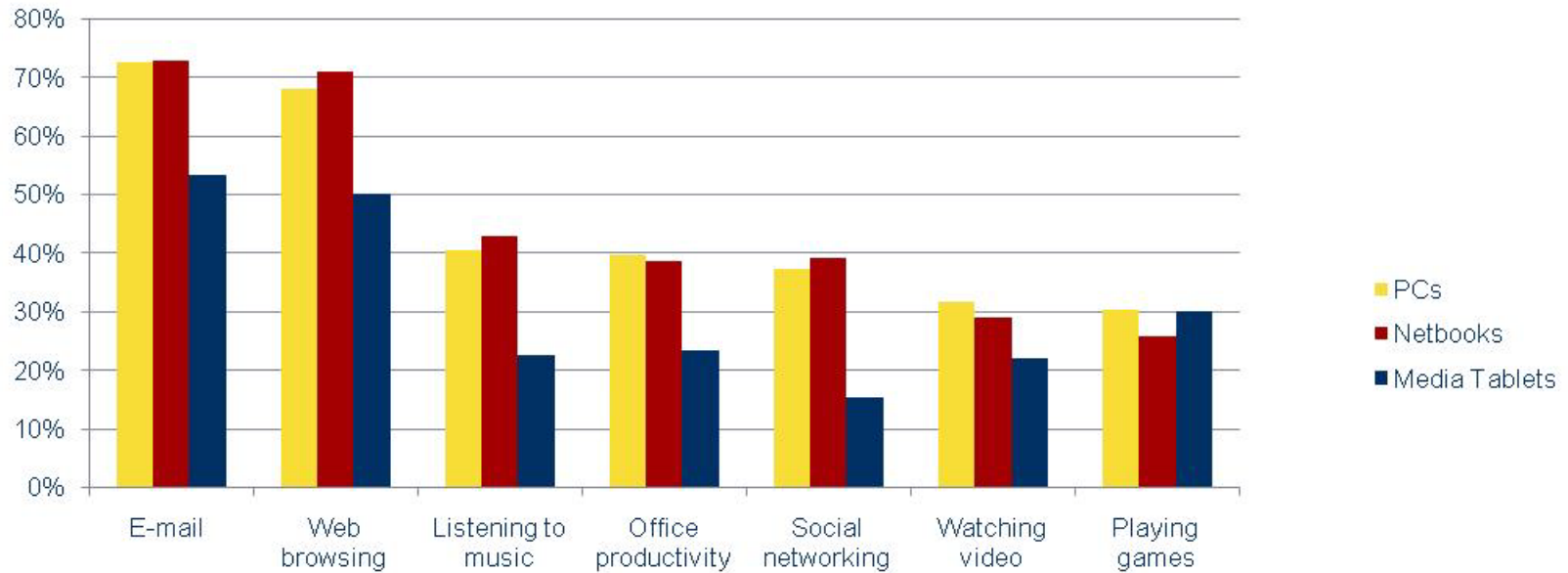
Total Devices: 700 M

2014



Total Devices: 1.5 B

Daily Application Usage

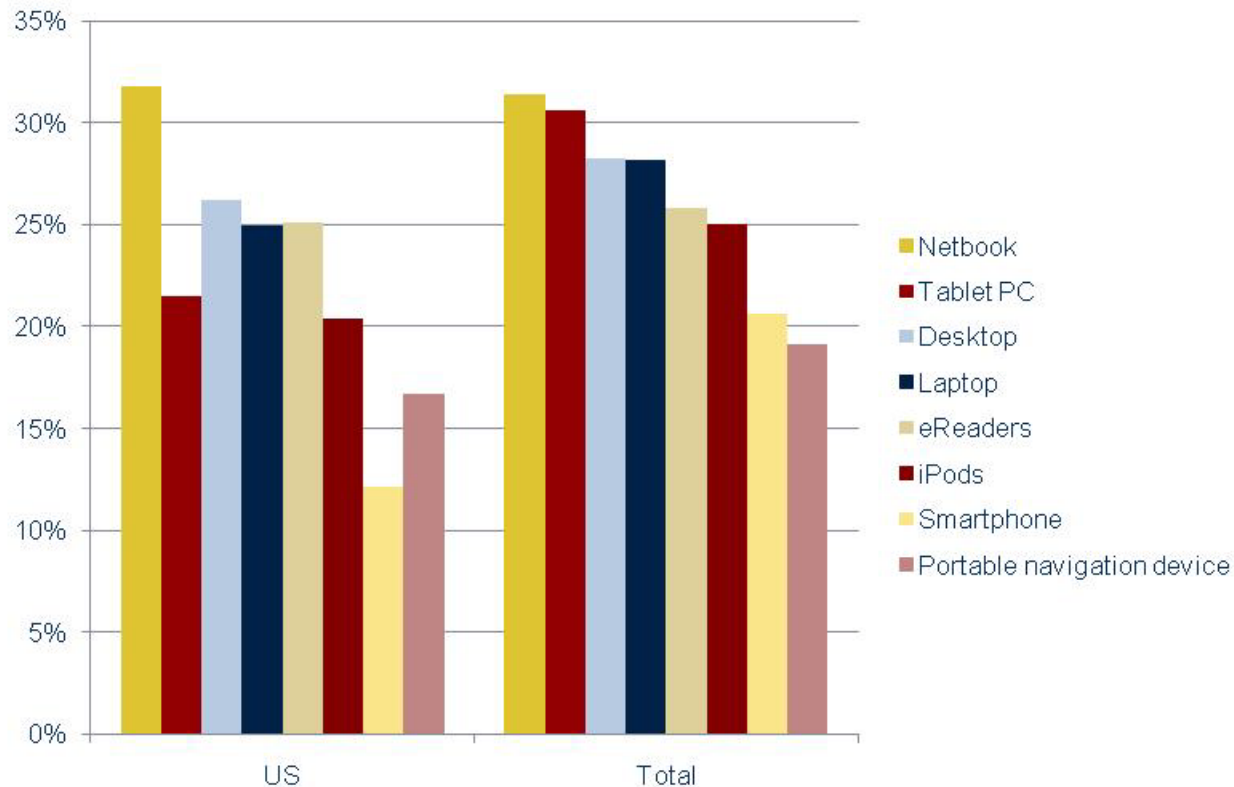


Sources: IDC Fall 2010 WW Mininotebook Multi-Client Study,
IDC Winter 2010 WW Media Tablet Multi-Client Study

Impact on Other Device Usage

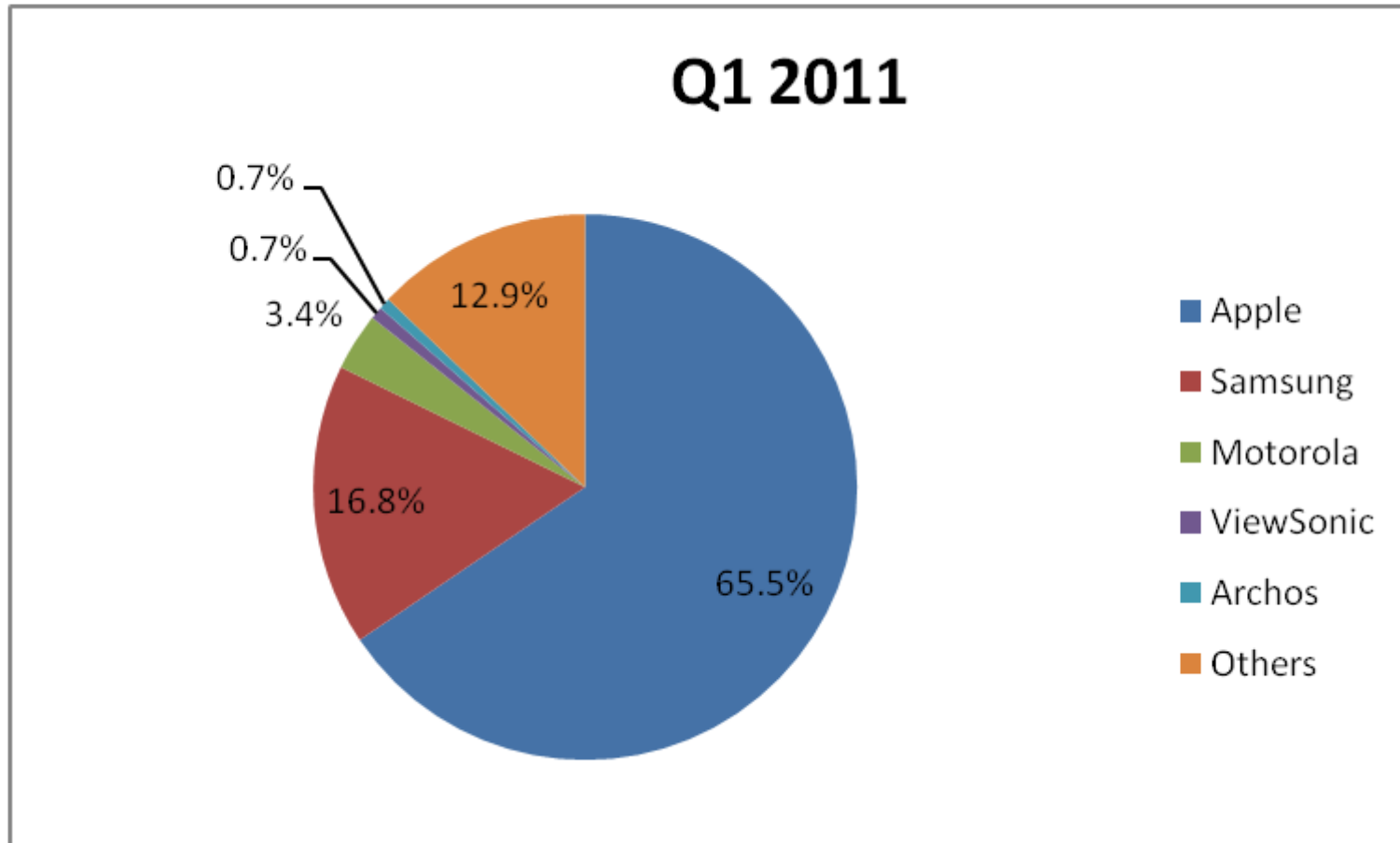
Q. How has the iPad affected your usage of the other devices you regularly use?

Usage Impact on Other Devices



Source: IDC Winter 2010 WW Media Tablet Multi-Client Study

- Netbooks are the most impacted devices
 - They're used about 30% less by iPad owners
- Least impacted overall is portable navigation devices
 - In US, it's smartphones



Total = 7.2 M

Source: IDC Media Tablet Tracker, June 2011

Q1 2011 Feature Characteristics

- OS
 - 65.5% **iOS**
 - 34.4% **Android**
 - 0.1% **Other**

- Connectivity
 - 50.7% **WiFi**
 - 49.3% **3G**

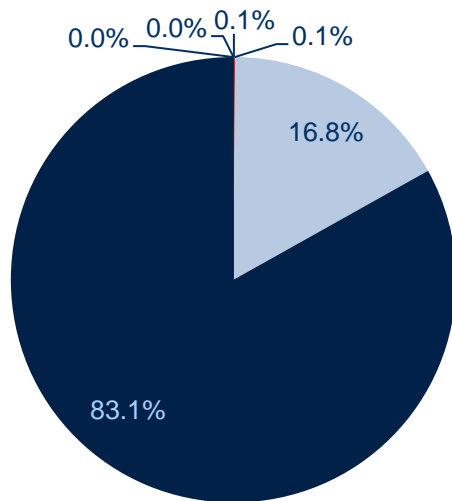
- Screen Size
 - 73.8% **9.7” or Larger**
 - 25.4% **7” or Smaller**
 - 0.8% **8-9”**

- CPU Type
 - 99.9% **ARM**

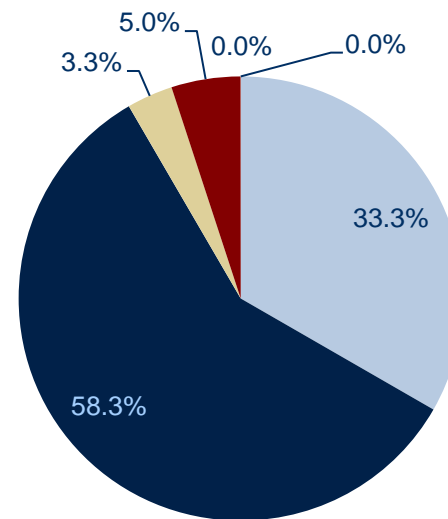
- Storage Capacity
 - 11.5% **8GB or Less**
 - 44.1% **16 GB**
 - 31.2% **32 GB**
 - 13.2% **64 GB**

W.W. Media Tablets by OS, 2010 and 2011 (%)

2010



2011



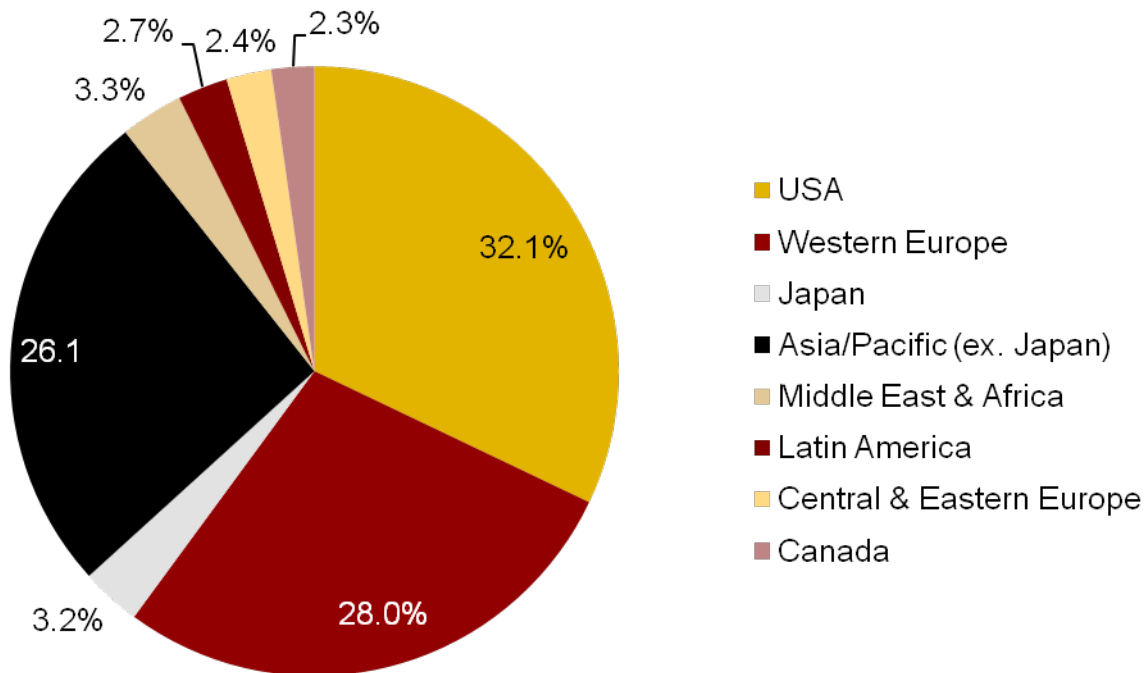
- Windows CE
- Other
- Android
- iOS
- webOS
- BlackBerry OS

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Source: IDC's Worldwide Quarterly Media Tablet and eReader Tracker, June 2011

Media Tablet Regional Splits

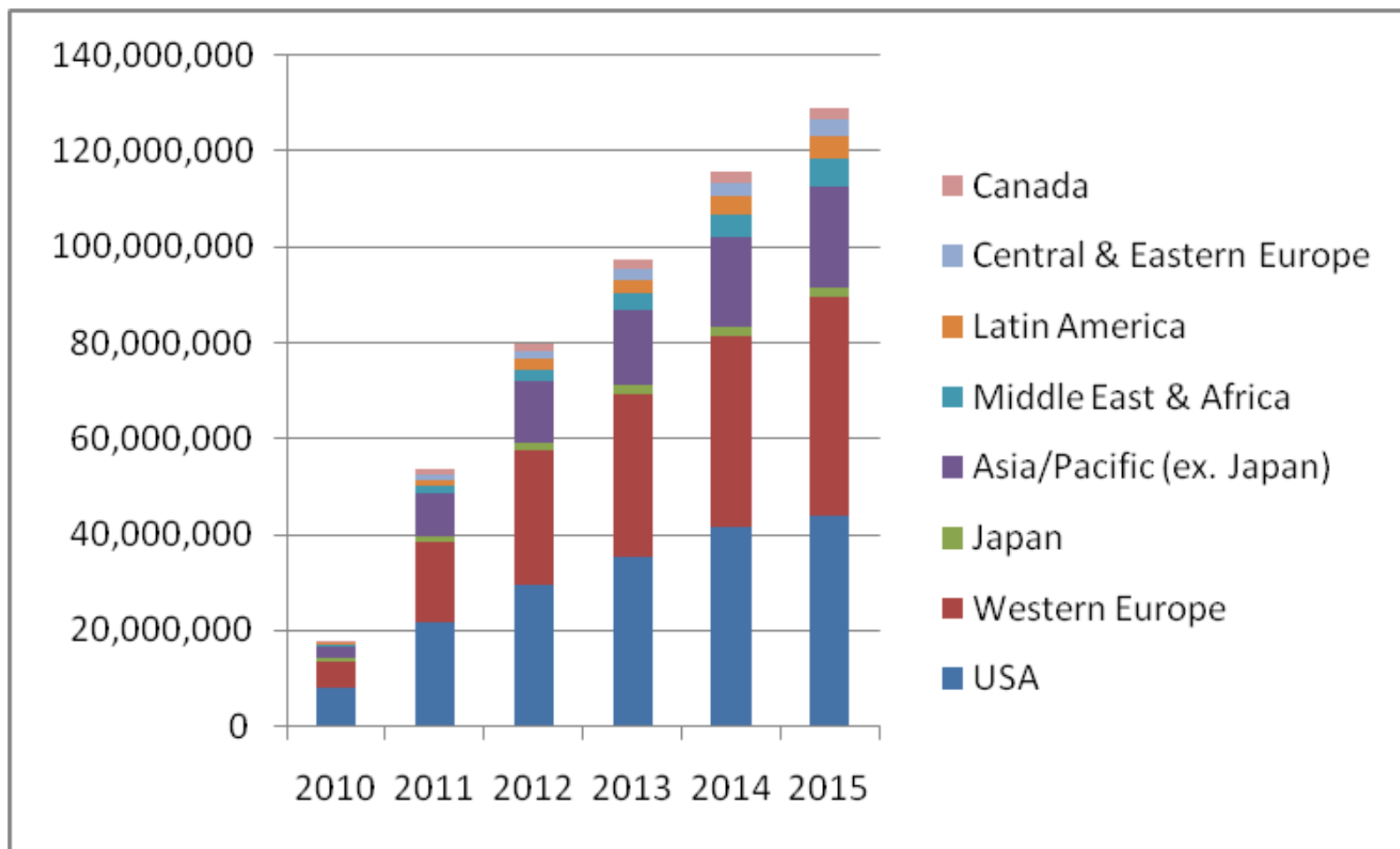
Q1 2011



Total = 7.2 M

Source: IDC Media Tablet and eReader Tracker, June 2011

W.W. Media Tablet Shipments by Region, 2010 – 2015 (M)



Source: IDC Media Tablet and eReader Tracker, June 2011

- Multiple mobile devices/person is the new reality
 - But devices and platforms are diverse
- Cannibalization based on false assumptions
 - People don't want just one device
- Application support is critical
 - Both for PCs and tablets
- Consumers and Business people want multi-device data plans

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