

## THE EVOLUTION OF SMARTPHONES — 2010 EDITION

A new focused report, compiled after extensive research and industry consultation, which presents key findings, such as:

- ▶ The share of handset shipments that will be smartphones by 2015 and the regions that are expected to see the most significant smartphone growth
- ▶ How smartphone average selling price (ASP) and bill of materials (BOM) cost will evolve over the next several years
- ▶ The smartphone operating systems (OS) that are poised for greater market share in the future and how the shifting smartphone OS landscape will affect application developers
- ▶ The strengths, weaknesses, opportunities, and threats to each of the handset vendors participating in the smartphone market
- ▶ Analysis of how handset OEMs and component suppliers will address the need for increased power for smartphone features and connectivity
- ▶ Examination of whether or not touch and QWERTY technologies will remain the dominant input methods in smartphone design

## THE EVOLUTION OF SMARTPHONES — 2010 EDITION

- ▶ Smartphone vendor market shares and shipment forecasts to 2015 split by region
- ▶ Smartphone bill of materials (BOM) broken out by average component cost
- ▶ Smartphone OS market shares and forecasts to 2015 with analysis of the strengths and weaknesses of each platform
- ▶ Detailed forecasts provided for key smartphone features including multimedia features, connectivity solutions, and input-output technologies
- ▶ Examination of the smartphone competitive environment with thorough analysis of the strengths, weaknesses, opportunities, and threats for each major smartphone vendor
- ▶ Analysis of the market drivers and potential obstacles for smartphone shipment growth
- ▶ **Single-user license to report (PDF)**  
**\$3,570 / €2,630 / £2,100**

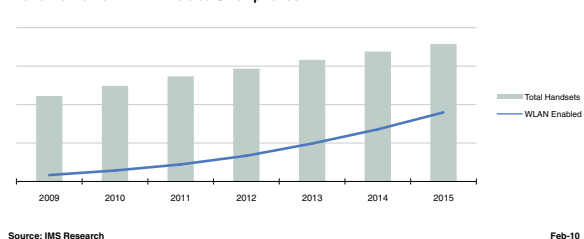
### World Market for Smartphones by Region

	2009	2010	2011	2012	2013	2014	2015	CAGR 10-15	SUM 10-15
Americas	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX%	XXX,XXX
% of Smartphones	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX,XXX
Asia	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX%	XXX,XXX
% of Smartphones	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX,XXX
Europe	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX%	XXX,XXX
% of Smartphones	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX,XXX
MEA	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX%	XXX,XXX
% of Smartphones	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX%	XXX,XXX
<b>Total Smartphones</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX,XXX</b>	<b>XXX%</b>	<b>XXX,XXX</b>

Source: IMS Research Feb-10

### World Market for Smartphones by Region

### World Market for WLAN-Enabled Smartphones



### World Market for WLAN-Enabled Smartphones

## REPORT INTRODUCTION

Despite a contraction in the mobile handset market in 2009, smartphone shipments grew by 15% YoY. This phenomenon highlights a growing trend in consumer preference, with an increasing number of purchasers choosing smartphones when upgrading their handsets. This has led to a diversification of smartphone portfolios by OEMs, creating a wide array of smartphone classes, target markets, and intended uses. This report analyzes the smartphone market by examining the trends, issues, and dynamics shaping the evolution of smartphones.

Some of the key market breakdowns are as follows:

### BY GEOGRAPHIC REGION

- ▶ Americas ▶ Asia ▶ Europe ▶ Middle East & Africa
- ▶ Worldwide

### BY OPERATING SYSTEM

- ▶ Android ▶ Apple OS X ▶ Other Linux
- ▶ MS Windows Mobile ▶ MeeGo ▶ Palm WebOS
- ▶ RIM Blackberry OS ▶ Symbian

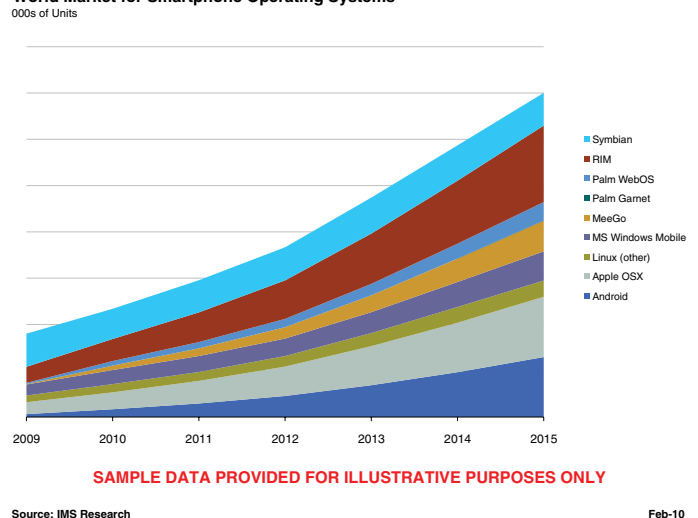
### BY SMARTPHONE VENDOR

- ▶ Acer ▶ Apple ▶ Dell ▶ Google ▶ HTC ▶ Huawei ▶ LG
- ▶ Motorola ▶ Nokia ▶ Palm ▶ RIM ▶ Samsung ▶ Sharp
- ▶ Sony Ericsson ▶ ZTE

### BY FEATURE & TECHNOLOGY

- ▶ WLAN ▶ Bluetooth ▶ GPS ▶ NFC ▶ Speech I/O
- ▶ Touchscreens ▶ Keypad Type

### World Market for Smartphone Operating Systems



### World Market for Smartphone Operating Systems



*As smartphones continue to become simultaneously more sophisticated and affordable, shipments of smartphones are experiencing explosive growth. To continue this trend, smartphone vendors are finding it more critical than ever to carefully manage expanding feature sets and falling selling prices to maintain profit margins. Consequently, the competition for smartphone market share is heating up and spreading to every segment of the handset value chain, from MNOs, to application developers, to smartphone component suppliers.*



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