

Smart phone market trends

2010/2011

Canalys is the leading global provider of smart phone market data and analysis. The world's leading hardware and software vendors and mobile operators rely on Canalys for comprehensive market share data, market forecasts, trends analysis and advice.

Despite the global economic downturn, worldwide smart phone shipments grew a solid 16% year-on-year in 2009 - far outpacing the wider mobile phone industry. Competition in 2010 has become fiercer than ever; the barriers to market entry are lower than ever before, and the leading mobile phone vendors and operators are showing strong commitment to and unprecedented investment in the smart phone segment. Vendors are launching more products with lower price points and pushing smart phones into the mass market, with OS platforms such as Symbian, Android and the newly introduced bada from Samsung. Network operators are struggling to establish the best strategies to open up new revenue streams, while having to manage complex partnerships with strong hardware vendors, as well as other companies that have entered their world with mobile service revenue aspirations of their own, such as Google.

The Canalys annual mobile trends report, now in its ninth successive year, pulls together, in a concise format, qualitative analysis of key market trends, top-level market share and shipment estimates for the leading vendors, comparative analysis of vendors' performance and evaluation of their strengths and weaknesses, and forecasts for future market development.

This report is a unique work designed to help companies formulate their strategies in this rapidly changing environment.



Who are the leading smart phone vendors in each region?

How can vendors differentiate themselves in a crowded market?

How are the different mobile operating systems evolving and why?

Which operators have the best smart phone strategies?

How will the market grow over the next five years in different regions?

Why should you read this report?

Device vendors

Get a comprehensive view of your competitors' performance over the past year and analysis of their strengths and weaknesses. Understand the drivers and barriers to future adoption, and the trends in smart phone shipments, device features, form factors and operating systems.

Mobile operators, application, content and service providers

The number of smart phone platforms continues to increase as vendors try to seize a market advantage. Understand the impact of new platforms and the challenges and opportunities presented by supporting, or not, the different smart phone operating systems.

Manufacturing partners, accessory providers and ODMs

Understand how shipment volumes are likely to change and which vendors and platforms are gaining the greatest traction in the worldwide smart phone market to identify which accounts may be at risk and how to target your business effectively.

Technology channels

Despite the ongoing economic challenges, smart phones and related applications and services promise strong growth in both the consumer and enterprise markets. Understanding which vendors' products to support and where customer preferences are shifting will be critical to future success.

Corporate decision-makers

The strategic benefits of mobility solutions are yet to be recognized by many businesses. But with the growth of smart phones in the consumer space more businesses will face employees wishing to bring smart phones into the workplace. Understanding which suppliers are likely to succeed and which may struggle, as well as being aware of future technology trends, will help guide your planning and approach to this trend.

The investment community

Understand the strengths and weaknesses of the different vendors and their approach to the market. Gain insight into the regional differences around the world. Which companies are best placed to prosper and so deliver shareholder value? Get the views of the leading analyst firm tracking the growth areas in mobile devices, applications and services.

Report contents

Smart phone market overview by region

With separate sections on North America, Latin America, Asia Pacific and EMEA (Europe, the Middle East and Africa), Canalys presents key smart phone market data points and discusses the main vendors' activities and

What are the biggest threats to today's leading smart phone vendors?

What are the key trends in user interfaces and form factors?

What opportunities do markets in Latin America and Asia Pacific offer?

What differentiates the leading platforms?

Where are the key competitive arenas for Google, Apple, RIM, Microsoft, Nokia et al?

performance. Important underlying market factors are considered, including changes in the mobile operators' networks and strategies, subsidies, product launches and the relationships between device vendors and operators, as well as the effect of the recent economic instability.

Device and application trends

Over the last 18 months the smart phone market has seen substantial changes in the input method used for operating devices. Canals analyzes the impact of touch-screens on the smart phone sector and how trends in software and hardware user interfaces are shaping market development, as well as looking at where future growth will come from. The challenge of product differentiation is explored as well as the impact of new categories of devices, such as the pad, on the mobile phone market.

Future trends

In this year's report, Canals explores how the smart phone market will evolve, which vendors are best placed for success, as well as which regions offer the most opportunities and what factors will drive growth in the significantly different regions. The activities of local and international brands are considered across the regions, and the report explores the unique dynamics of markets such as China, India and South Korea.

OS vendor SWOTs

Canals analysts discuss the relative merits, challenges, opportunities and threats of the eight leading smart phone platforms. Understand which platforms are best equipped to capitalize on the growth in the smart phone market, and identify prospects for each platform in a highly competitive market place.

Smart phone vendor and mobile operator PoV analysis

The performances and strategies of the leading global smart phone vendors and the world's leading operators per region are analyzed using the unique Canals Point of View (PoV) tool. The vendors assessed are: Apple, Fujitsu, HTC, Motorola, Nokia, Palm, RIM, Samsung, Sharp, and Sony Ericsson. The operators analyzed are: AT&T, China Mobile, NTT DoCoMo, Telefónica, Verizon and Vodafone.

Definitions and methodology

Understand how Canals classifies different products and how the market data is collected and processed. The Canals segmentations are accepted as the standard for the industry and are used by the major vendors in analyzing the market and planning for the future. Canals tracks these markets globally on a quarterly basis to ensure that the views it presents on future market development are well-founded and take into account the latest dynamics.

Data tables and charts include:

- Smart phone shipments and market shares by hardware vendor and region
- Smart phone shipments and market shares by OS provider and region
- Total mobile phone shipment forecast by region (four-year)
- Smart phone shipment forecast by OS vendor and region (four-year)
- Smart phone shipment forecast by primary input (four-year)
- SWOT analyses for the leading platform vendors

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