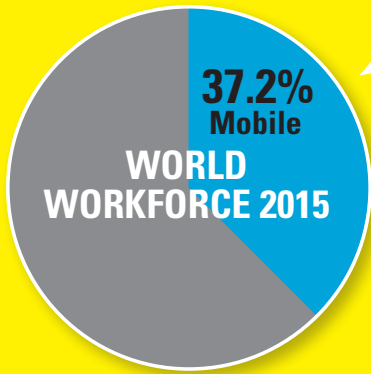


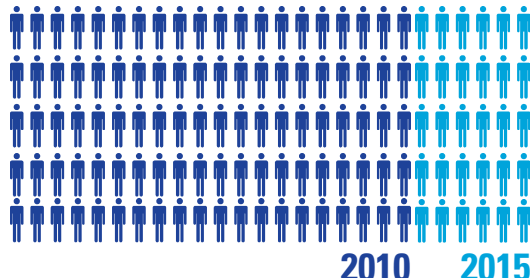
THE RISE OF MOBILITY

The mobile era in the workplace is emerging. IDC's research shows that mobility trends transcend geographic, industry and cultural boundaries.

By 2015, the world's mobile worker population will reach **1.3 billion**, or 37.2% of the total workforce. That is another **300 million** mobile workers on the planet compared to 2010



+30%



AMERICAS

EUROPE, MIDDLE EAST, AFRICA

ASIA PACIFIC

182.5 mil → 212.1 mil

MOBILE WORKERS 2010-2015

186.2 mil → 244.6 mil

629.6 mil → 877.3 mil

1 person icon = 10 million mobile workers

SMART CONNECTED DEVICES 2010-2015

230 mil

570 mil

229 mil

513 mil

236 mil

766 mil

The worldwide market for smart connected devices is a combination of desktop PCs, notebook PCs, smartphones, and tablets.

SMART CONNECTED DEVICES BY FORM FACTOR 2010-2015

SMART PHONES

AMERICAS

94 mil

305 mil

EMEA

108 mil

297 mil

ASIA PAC

103 mil

527 mil

By 2015... Asia Pacific consumers will account for **HALF** of the mobile phones shipped globally

By 2015... **1 in 5** desktops sold in Asia/Pacific will be an All-in-One

DESKTOP PC

AMERICAS

48 mil

45 mil

EMEA

41 mil

37 mil

ASIA PAC

68 mil

78 mil

NOTEBOOK PC

AMERICAS

67 mil

88 mil

EMEA

73 mil

98 mil

ASIA PAC

60 mil

103 mil

By 2015... **1 in 4** notebooks sold globally will be an ultra-slim notebook (including Intel Ultrabooks)

TABLET

AMERICAS

20 mil

130 mil

EMEA

7 mil

81 mil

ASIA PAC

5 mil

57 mil

In the next 4 years... the CAGR of tablets will be **3X faster** than PCs



31%

of retailers in Asia Pacific have adopted mobile/wireless solutions for store and customer relations systems

Just under **50%**

of manufacturers surveyed are looking to introduce wireless/mobile solutions in 2012-2013

Government tablet adoption will almost double in 2013 – an

85% increase

Government-issued smartphones will steadily grow at

10% a year until 2015

Banks in tier 1 markets are reporting as many as

5.8 transactions

per customer per day on mobile devices



Asia Pacific retailers will spend **US\$934.3 million** on smart handheld devices in 2013

29%

of APEJ healthcare service providers expect to invest more in mobile devices in 2013

Smartphone use in Asia Pacific healthcare to grow at a CAGR of

14% till 2015

Tablet use in Asia Pacific healthcare to grow at a CAGR of

49% till 2015

Up to **16%**

of banking customers in tier 1 Asia Pacific countries are active users of mobile banking apps

SOURCE: IDC WORLDWIDE MOBILE WORKER POPULATION 2011-2015 FORECAST (DOC #232073)

IDC WORLDWIDE QUARTERLY PC TRACKER

IDC WORLDWIDE QUARTERLY MOBILE PHONE TRACKER

IDC WORLDWIDE QUARTERLY TABLET TRACKER

IDC FINANCIAL INSIGHTS, IDC RETAIL INSIGHTS, IDC HEALTH INSIGHTS, IDC COUNTRY INSIGHTS, IDC MANUFACTURING INSIGHTS

IDC WORLDWIDE QUARTERLY PC FORECAST, NOVEMBER 2012

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