Personal Technologies: Integration Drives $3 Trillion Market

Werner Goertz
Research Director
Personal Technologies
By 2018, consumer spending on personal technology will reach $3.1 trillion
Agenda

1. How do successful digital businesses capture the $3 trillion market?
2. Opportunities integrating devices in the digital mesh
3. Visions, trends and predictions
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>$3 Trillion Opportunity for Personal Technology Sales by 2018
Opportunity in the Adjacencies of Personal Technologies

2018 Spending on Personal Technology in $3.1 Trillion

- Mobile Apps/Svcs
- e-Text
- PC Software
- Landline Voice Svcs
- Fixed Internet Access Svcs
- Mobile Data Svcs
- Other Devices
- Entertainment Devices
- MobilePhones
- Entertainment Content
- Connected Home Svcs
- Pay-TV Svcs
- Mobile Voice Svcs
- Wearables
- Computing Devices/Printers

2018
### Digital Business, Improved Experiences Drive Demand

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<thead>
<tr>
<th>Focus</th>
<th>Digital Marketing</th>
<th>Digital Business</th>
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<tbody>
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<td></td>
<td>Exploit the nexus to drive greater efficiency</td>
<td>Extend potential customers from people to things</td>
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<tr>
<th>Outcomes</th>
<th>Digital Marketing</th>
<th>Digital Business</th>
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<tr>
<td></td>
<td>Optimize interactions</td>
<td>Build new business models</td>
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<thead>
<tr>
<th>Entities</th>
<th>Digital Marketing</th>
<th>Digital Business</th>
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<tbody>
<tr>
<td>People</td>
<td>Business</td>
<td>People, Business, Things</td>
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<th>Disruptions</th>
<th>Digital Marketing</th>
<th>Digital Business</th>
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<td>Deeper customer relationships, analytics</td>
<td>Creation of new value and new nonhuman customers</td>
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<tr>
<th>Technologies</th>
<th>Digital Marketing</th>
<th>Digital Business</th>
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<td>Mobile, big data, social,</td>
<td>Sensors, 3D printing, smart machines</td>
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- By 2020, 75% of businesses will become or prepare to become a digital business
- 50% of IT leaders will implement digital business by 2016
- 41% transitioned to digital marketing in 2014
- Smart apps create new value, new business models for engaging consumers
Platform Partnerships Drive Economic Value

ECONOMICS OF CONNECTIONS

- Multidisciplinary by Design
- Dynamically Connected and Reconfigurable
- Semiporous Boundaries
- Continually Sensing, Learning and Reconfiguring

Product

Company

Ecosystem

Gartner
Agenda

1. How do successful digital businesses capture the $3 trillion market?
2. Opportunities integrating devices in the digital mesh
3. Visions, trends and predictions
The Digital Mesh Integrates Traditional, Mobile, IoT Devices
not sure you need this slide if you have the retail digital business moment one, skip this and use the other one. 
it's more specific and audience is looking details in this part of the pitch.

Johnson, Andrew, 3/1/2016
Integration Gathers Pace in 2016

Emerging

Devices

Networks

Apps, Content, and Services

The Future
Home Ecosystem Integration
Customers Want A Holistic Experience

1. Intelligent
2. Personalised
3. Integrated
4. Instantaneous
5. Private
Customers Live Holistic Lifestyles With Personal Technologies
Smartphones Manage Data to and from Multiple Devices
Agenda

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"Robos" Rising  Security Threats  Life After Apps
IoT Opportunity: By 2018, 6 billion connected things will be requesting support

Product leaders:

Start viewing "things" as customers of services!

Build products and services that satisfy their nonhuman requests!
Monitoring the Employee
Another Step Toward Quantifying the "self"

Product leaders:

Build products and services platforms that

• fill the needs of the quantified self
• satisfy need for privacy and security
• help save money for enterprises, employees and ecosystems
By 2020, the Human – Machine Interface Will Be Radically Different!

- Passwords are annoying
- Our faces and voices are our signatures
- Active biometrics are scary
Users Are Embracing the Intelligent User Experience

Sync Me

"Store and sync my apps"
Cloud services are an essential part of consumer services and apps

See Me

"Understand my context"
Location, mapping and contextual services are widely adopted

Know Me

"Understand my needs, wants and boundaries"
Hypercontextualization is underway and in the early adopter phase

Be Me

"Act on my behalf based on learned and explicit rules"
Virtual personal assistants are leading the way toward the emerging Be Me services
By YE18, Virtual Personal Assistants Will Bring in the Post-App Era

**Product leaders:**

Integrate your products / services into the ecosystems of the post-app era

Find “white spaces” that are unique to you

Build barriers to protect your place in the post-app era
Recommendations

- **Explore**: Enter adjacent markets, look beyond today’s revenue streams
- **Engage**: Create value through open, fluid, synergistic partnerships
- **Enhance**: Position your product / services portfolio in the Digital Mesh
- **Earn Trust**: Respect the privacy of users’ personal information.
- **Enrich**: Provide end-user value with products that support and leverage the post-app era
The Future Is Ours