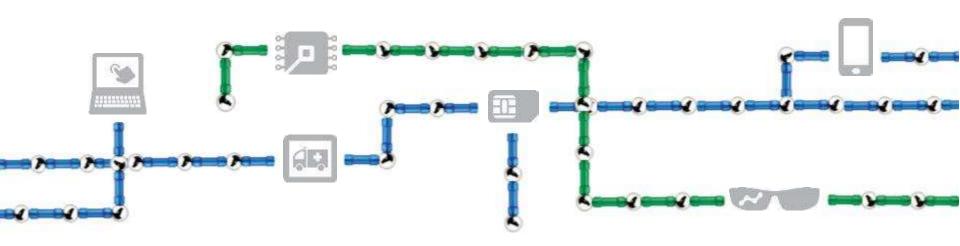
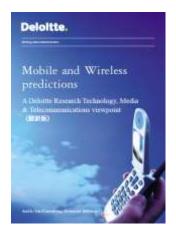
Deloitte.

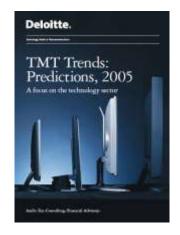
TMT Predictions 2014 Advance. Intelligence.

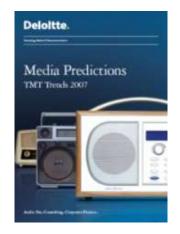


TMT Predictions was first published in 2001

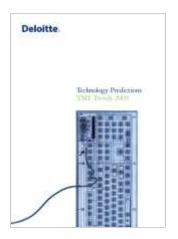




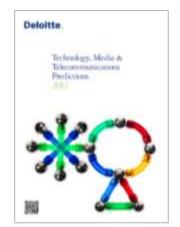


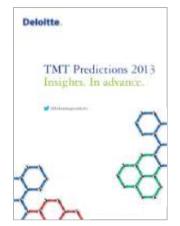


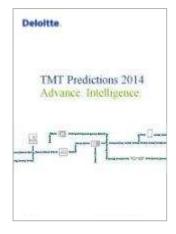




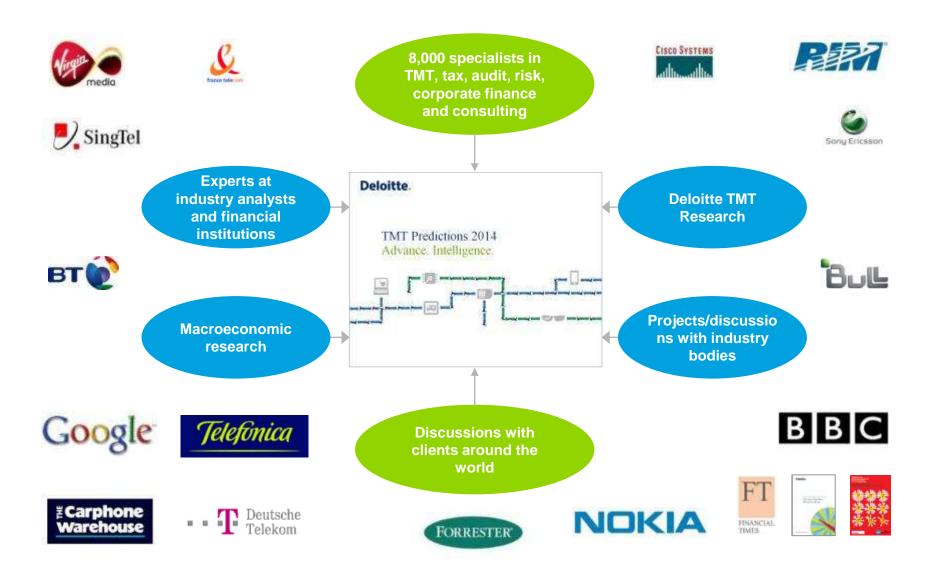








TMT Predictions methodology



>250 end notes + >400 references + 1000s x conversations + 10,000s survey responses = P 13.

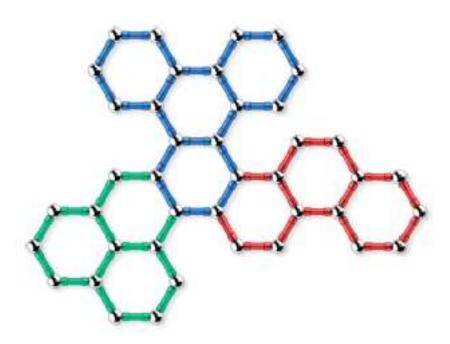
Endnotes

- Those who have lablets are likely to have lower PC use, of course. But even in developed markets, lablet penetration is less than 25 persons. Source: Pew Internet: Mobile, The Pew Research Center. 4 December 2012. See: http://pewinternet.org/Commentary/2012/February/Pew-Internet-Mobile args.
- 2 The definition of a unariphone for this posticition is based on communer perceptions of what a maniphone is, rather than the standard anisotry definition, which pents are the type of operating system (OS) used. Many communer, particularly middle majority adoption, an illusty to consider phones as smart if they have located screen in this templace of a running and a running and the second in the secon
- 3 Delatific Touchs Tehnative Limited earlyin which instales sales extendes for labelity and maniphones (based on our broader definition of unarphones). The estimates are bosed on our string invested logical products promerations and published industry solestmates and beneat what an Keey's I Billion Smart Correction Devices Subgred in 2011 with Hispanier's Rejected to Device by 2016, According to DC, (DC, 2018 America) (and a March 2012. See hit public week as competition, popularizational cyclicity and Partial Electrical Conference (and Electrical Confere
- Source: Forecast: PC Installed Base, Worldwide, 2006-2015, Merch 2011 Opides, Cartmer, 24 Merch 2011. See: http://www.gartme.com/eli.1602818 (requires subscription to read the full article) and Deletin Roughs Toleradus Limited extends for 2013.
- 5 The estigns for the involved base of blaich and smartphases are estimate based on existing broadedge, conservations with industry players and published history estimate and forecast including. Socrat: promise: 700M Edistri in the fly 2010, Apple Class Leader, Frames Abio Enter The Frame, Technicals, 24 April 2012, See: http://doi.org/10.1006/24/formstr-7001-dailab in-sur-by-2010-apple-dailab in-term-also ester-the harm?
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- Source: Slate of the Media: The Cross-Platform Report, Niehen, March 2012. See: http://www.niehen.com/content/dam/corporate/un/en/reports-downloads/2012-Reports/Niehen-Cose-Platform-Report-Q2-2012-thal-pdf
- Il Source Peer auto-correction, predictive lost and copy and paste functions mean tablets are not yet meeting over and corporate computing needs, Adaptat, 12 July 2011, See, from Judge bit correlated the Value in terms must leap-transfur perventions laptices.
- Sometimes highest come alread of unariphones and sometimes beford. Source: Design Used for Ordine Activities by Smartphone Owners in Canada, April 2012.
 See: http://pinteent.com/pin/25192079130536721/
- 10 Comparing KC and mobile CPU power is about more than just the number of cores and clock speed. Novetheless, the performance just between mobile and comparing processors has numbered significantly in the part has wait.
- Source PC: Are Selling Just Fire, Thank You, PCWorld, 25 January 2012. Sec: http://www.pcwartd.com/article/248778/pcs_are_esting_just_fire_thank_ you blind
- 12 Source PC General Market New and Tening as Rolated Hardware Business Tops 523 Billion, Richtlandware, J. May 2012. See http://ferthandware.com/News/ PC-General-Market-New-and-Tening-as-Related-Hardware-Business-Tops-22-Billion
- 13 Source Do you observely think your smurtphone? CNN, 28 July 2011. See: http://www.con.com/2011/46ACTH/07/20/op imariphone observed ciden? Indian feet
- 14 Source State of the Media. The Cross-Partiern Report, Nature, March 2012. See http://www.minten.com/control/dan/corporate/ca/en/operts-downloads/2012-Reports/Nature-Cross-Partiern-Report-Q2-2012-free pdf
- 15 Other regressents the final DS percent. The combiner methodology states that "Tellament hatfit is measured....ac comparison level page your data collected from more than a million demants tagging with combiner." Source: 2012 MODILS INFOCUS, Page 9, combiner, February 2012. See: http://www.mchn.com/state/data/sffive/processore/80007818_00064667_2005.pdf.
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- 18 Over 25 percent of American adults have access to all time form factors. Source Half of U.S. adults own a smartphone or tablet, Pew survey says, Computerworld, 1 October 2012. See http://www.computerworld.com/vartede/0231002Net/_of_U.S._adults_own_a_variet/phone_on_label_?ee_survey_says.
- 19 In fact the relationship was linear across such age group as respondents got order they preferred beliefs more. Seazon Devices, Comumption, and the Digital Lambscape 2012, Debottle Development LE, February 2012. See: http://www.debottle.com/wineshi/Dever-Umbeditates/Loca/W2DAseth/Dever-minks, brit, Seazon's Surmery Dever-Sade (1921) and
- 20 Delattle Touche Toleratru Limited extinute
- 21 "TI Procurement stands on its head", Source: Sectionology Predictions, Delattle Rouche Tohmatics Limited, 2010. See: www.delatids.com/tm/predictions/2010
- 22 Almost all BYOX putchases seem to be for liquidge. Desistops do not appear to be the usual choice under these programs, although they are usually not specifically excluded.
- 23 Source Bring Your Over Device: New Opportunities, New Challenger, Gartreet, 15 August 2012. See: http://www.gartree.com/id-2125515
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- 28 Source: Computer and Internet Use in the United States, United States Comun Bankas, 2010. See: http://www.nemas.gov/fibes/computer/publications/2010.html
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- 31 Source Taked Cost of Ownership (TCO) of IT. Nesh Networks, January 2009, Soc http://www.neshretheories.ca/fated-cost-of-ownership-loo-of-4-htm.
- 32 Source: The make from EMOD to CMDD, Computer Sustain Review, 10 Documber 2012. See http://www.committee.com/blogs/do-rolling-blogs/guard-blog-fromsee-from-based-to-spack-to-spac
- 23 All charded beyboards have 47 symbol keep, or 54 with the shift buffer. Language down't affect the number of keys, just which symbols these keys represent.
- 34 34 raised to the eighth power: 6,095,589,385,410,816.
- Source: The Magical Number Sever, Plus or Mittan Two Some Limits on Our Capacity for Promoting Information. Limited by J Toronto, 10 October 2001.
 Soir Intho Present production and account of the Company o
- W. Uses land not to used symbols that are easily contrast, commonly exists, sentectors/colors, the two depters, forward sinh/back slash, the three quotation marks and the three sets of parentheses. That issues the most common symbols as: 1(\$95,000).
- 27 Source 10,000 Tee Provinces, Xalor, 20 Ame 2011, See http://www.net/searwords/trans-toe-word-parawords/
- 38 South: Lazy peroword traver open Bitts to crook's preventation, The Register, 20 July 2012. See: http://www.thengstor.co.uk/2012/00/20/persword_inuse.com/
- 29 Source: Research, Skull Socurity, 21 September 2011, Sec. http://www.skulluss.arthy.org/edis/hndox.php/Passworth
- Source: New 25 GPU Monter Devous Research in Second, Seconds Jodge; 4 December 2012 See: http://secirityleidige.com/mee-25-gpu-monter-devous-parameter-in-second/
 The small file machine is a Delotte Teacher Telemetru Limited estimate.
- Source Hackers crowchourse help to crack meety 6.5 million twiced United to personate, Computerworld, 6 June 2017. See: http://blogu.computerworld.com/20272/hackers_providence_help_to_provid_computerworld.
- 42 Source: Shartphone Persword Managers. Not Secure, PC Magaztre, 16 Merch 2012, Sec. http://www.hpcmag.com/renv/235400-elscenself-smartphone-
- 4.31 There are low published studies on this subject. Across about 30 and subject, the Design Tracke Matters Curried TMI group set up a standardised but structure. Journal south present of the present standard present south standard present south south of the PC, but from worse structure to results were amount of the security, white another group was much stower and both over 20 security string that. This was purely an informal and unsublished element to present some date of the difference between storing bounded or the set the between the presented entire or as all to believe the order to be difference between storing bounded order or as all to be between the present of the processor of the contract of the present of the presen
- 44 Source: Sale Reseword Harling, The IRVP Group, 7 December 2012. See: http://ghp.neithnimael/en/lag.passerods.php
- Sairce, RM's Buckberry 10 to Black Certain Resweeds, information Week, 5 December 2012. See: http://www.informationweek.com/sections/ blackberry-10-to-black-ordisin-psys/240143824
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- 40 Source Shartshore Recover! Kergers an Insecure SignsSoft 2012 Sec http://www.eksmot.com/FEKsepen WPhtml
- 49 The whole area of multi-factor for two factor) authoritization is complex. There are regulatory defections, limitations and many additional factors. The examples above are menty for Rischarthe purposes. An excellent summary can be found at Square. Two-factor Authoritization, Wildpedia, 12 December 2012. See: http://en.wildpedia.org/wildpedia/color_authoritization.
- Source German Hackers Publish Interior Minister's Engagement to Protect Against Bornetins Dis, GZMCCCC, 30 March 2008. See: http://ca.gamedo.com/GZMZ9/serman-hackers-publish-frieng-ministers-frequencing-backers-lateral-backer
- Based on Delotte Tourise Tohrnetsu Limited interviews with security experts and large companies.
- 52. Delethir Backle Tehrativa Limited conducted at units survey with a global firm of more than \$0,000 employees over a than week period. 7,791 responses were included. The survey were conducted plathabilet, and responses did not infect the quagagitet chinological be firm's periodic. Remove, the distribution of respondents by ago, position and bardien was a good match for the making of the coverage periodic provides and bardien about a single fellerative book the formation for the making periodic provides provides a survey and questions about look, an well as a weekly of all hot care groups on commander products. The installation is given the match has not install that the control provides a product of the periodic provides and the survey was classificated by small, but also drough the EXF or qualified. There have no install the survey installation and engagement to construct control existing states of the periodic provides and provides and the survey installation and engagement of control provides and provides and provides a periodic provides and provides a periodic provides a periodic provides and provides and provides and provides a periodic provides and provides
- 53 Source: 1994 Design of SurWeb Sun Microgrammi Instrumet, Sun Microgramm, 1994. See: http://www.sunit.com/papers/sunweb/appears to have been excess the first copyright instrumets.
- 54 Source: Intrared Statistics from Interest Insider World Soc Line 89 NYC, Communitelligense, 17 April 2009. Soc http://www.communitelligense.com/bips/ article.chm?weblog.596page-722
- 55 Sooze: Survey "Netter", Total Statistics, Medidalsto, Meth 73, 2012. Sec: http://www.mediablots.com/althetten/flos/2012/04/AYTM-Merkol-Research Twitter Studypdf
- 56 Source Netter facts and Squire, Restinn, July 2011. See: http://www.tim.wordpress.com/2007/10/touch-agency-twitter-facts-and-digures-110007122758-about-p012-041
- 1.7 For the latter group, it is expertisely most whether they regular or rest.
- 58 Excluding countries where these were insufficient answers (-25) to provide a meaningful sample.
- 30 These numbers were not consistent arrang those that used the SSA and those that debrit. "time restriction" was sized by \$1 percent of users, fact only 43 percent of non-users. Some 47 percent of non-users did not understand the use uses, while that factor was only 38 percent of users.

Deloitte.

TMT Predictions 2013 Report card



2013 Technology Predictions report card

	The PC is not dead – It's about usage not units		
••••	Bring your own computer – A tale of two interpretations		
	P@\$\$1234 – The end of strong password-only security		
	Enterprise Social Networks – Another tool, but not yet a panacea		
	Crowdfunding portals will raise \$3 billion in the year ahead		
	The button stays beautiful		

Legend



Didn't come true as we predicted

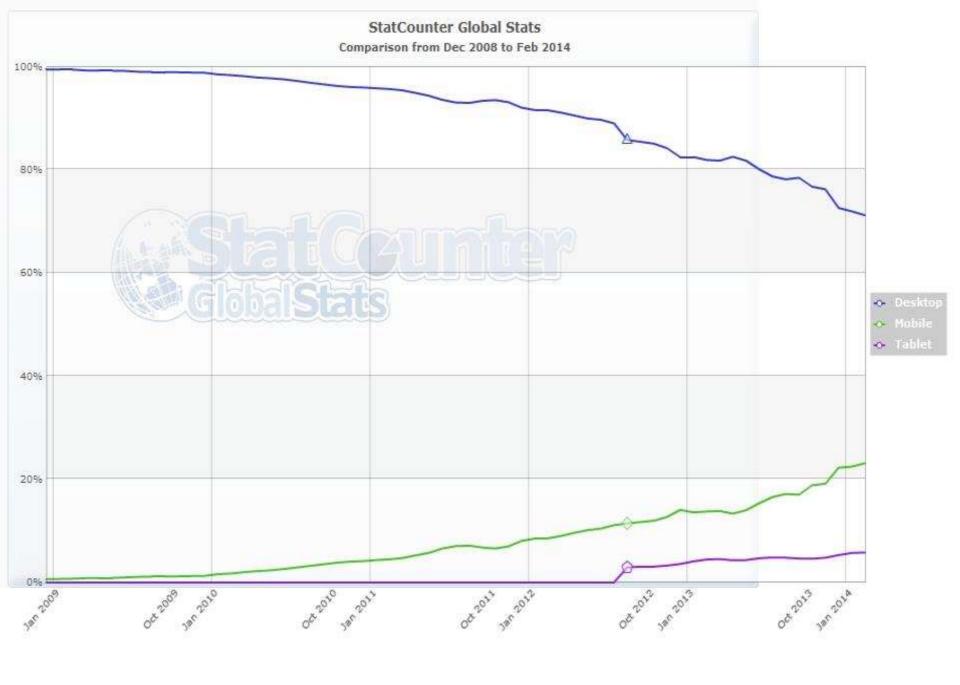


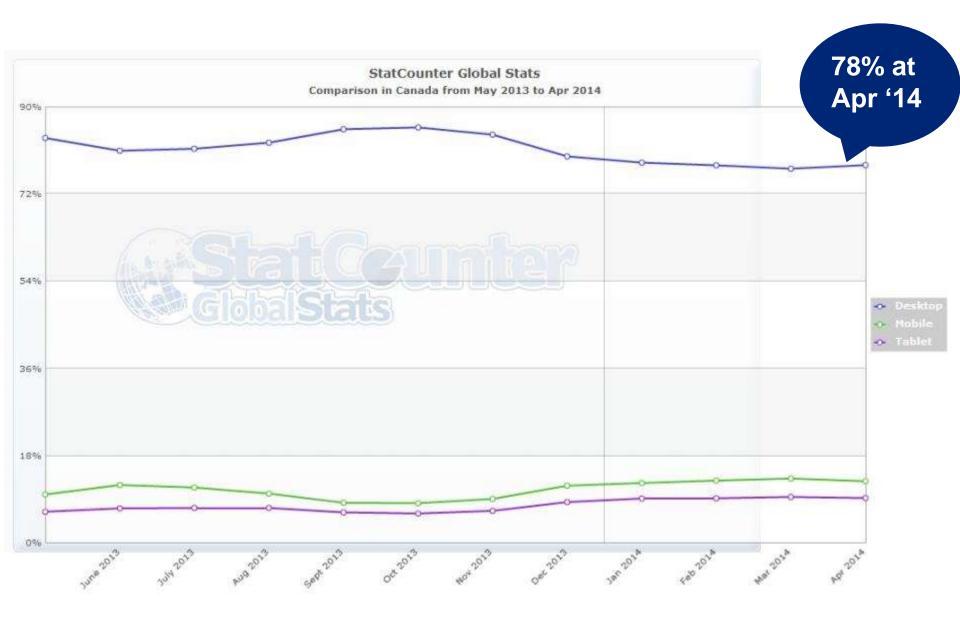
Came true, but less than we predicted. At least so far



Came true exactly as much as we predicted

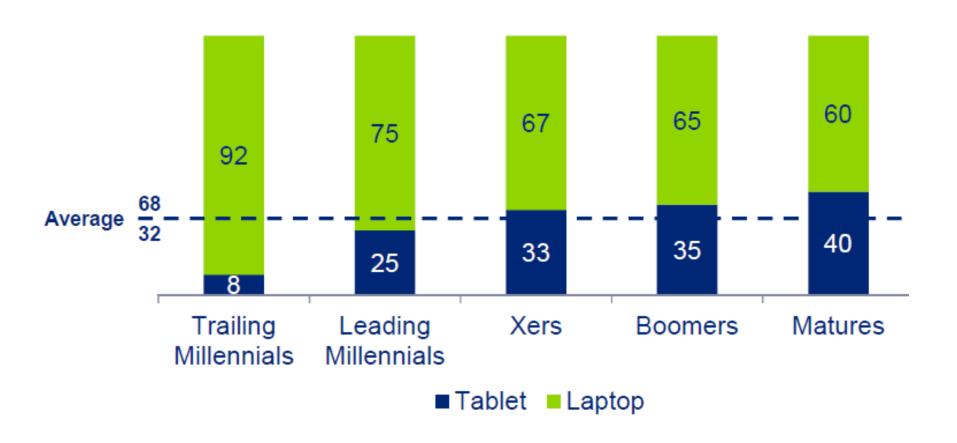




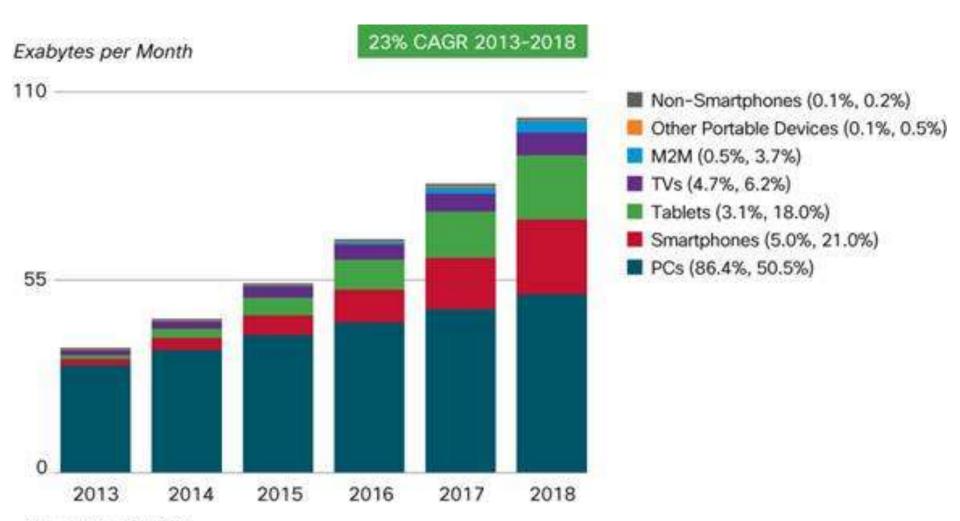


Which device is more important to you — that is, which device could you least do without?

(Among respondents who own both a laptop and a tablet)



Global Internet Traffic by Device Type



Source: Cisco VNI, 2014

The percentages in parentheses next to the legend denote the device traffic shares for the years 2013 and 2018, respectively.

2013 Media Predictions report card

••••	4K kicks off		
•••••	Dual video screening readies for prime time		
	Connected TV – Hits and misses		
	Over-the-top may lift legacy broadcasters and distributors more than pure plays		
•••••	The reality of "cord cutting" in North America		

Legend



Didn't come true as we predicted



Came true, but less than we predicted. At least so far

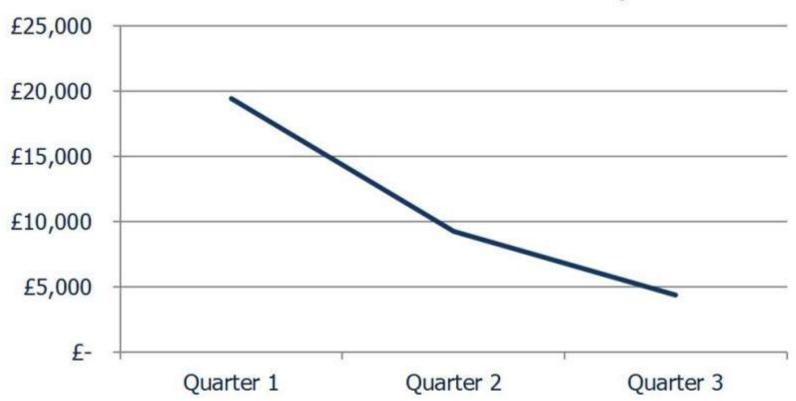


Came true exactly as much as we predicted

4K TV



Average price development of 4K TVs on idealo.co.uk since January 2013







0040 T		No. 20 11 12 11 11 11 11 11 11 11 11 11 11 11	The second second second
2013 IE	lecom F	2redictions	report card
		Todiotions	Topoit dala

A strong year for LTE adoption		
Smartphones ship a billion but usage becomes simpler		
Not all mobile advertising is created equal		
All-you-can-app		
Wireless spectrum "rush hour" means more traffic jams		

Legend



Didn't come true as we predicted



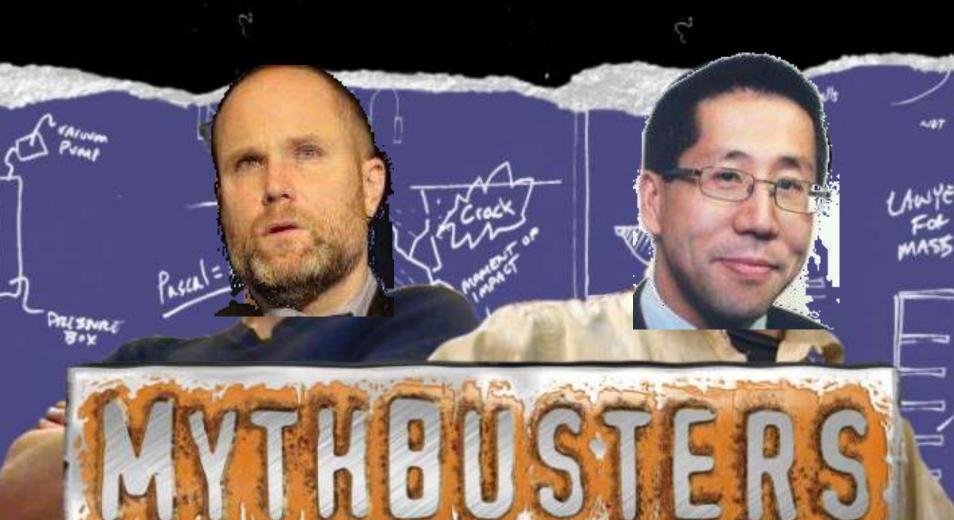
Came true, but less than we predicted. At least so far



Came true exactly as much as we predicted

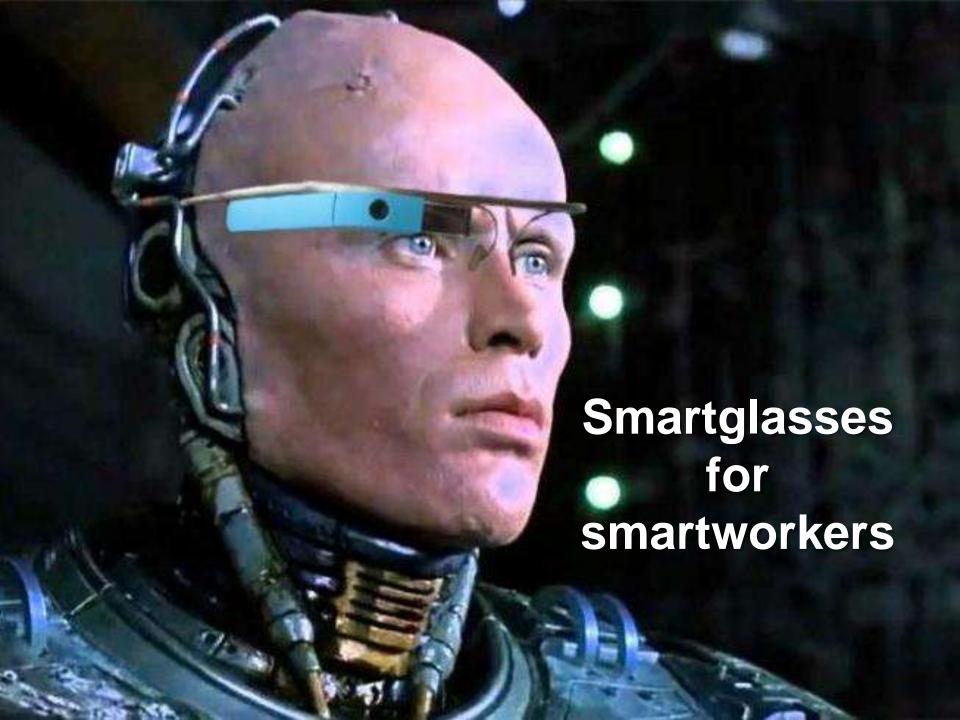
Total prediction accuracy







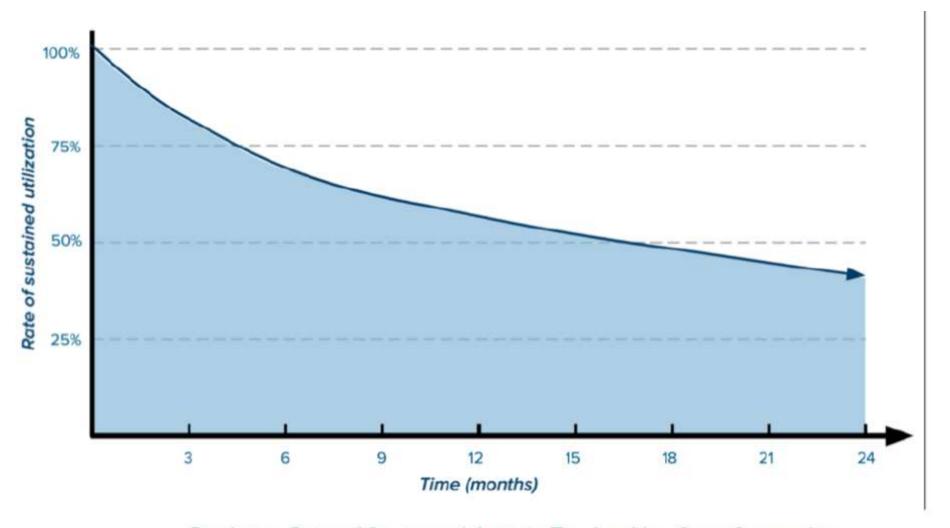




Is it time for smartwatches?



But what about fitness trackers?

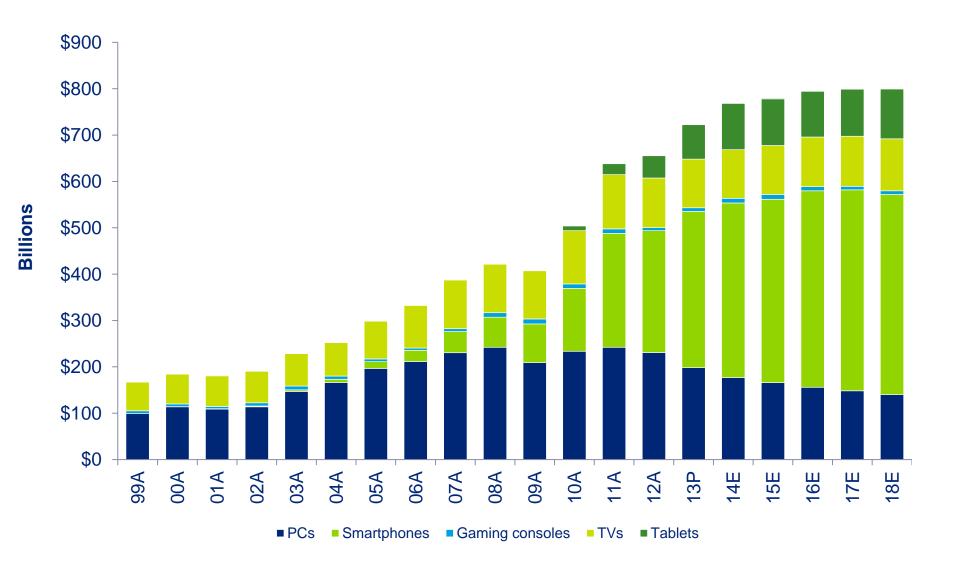


Declining Rate of Sustained Activity Tracker Use Over Ownership (Endeavour Partners, September 2013)

We have had the decade of the device



The decade of the device



Smartphone replacement cycles are getting longer



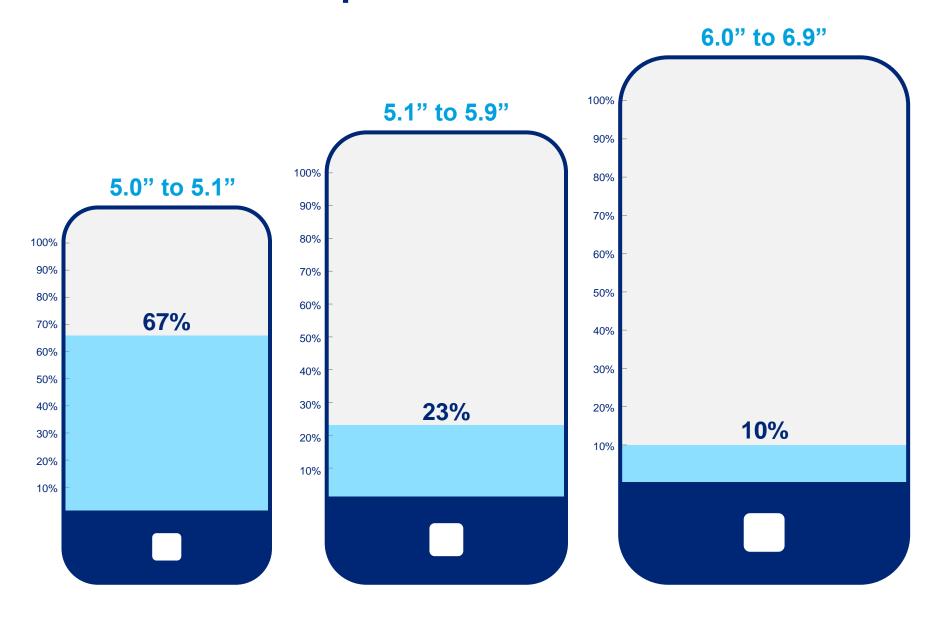
Source: US data, Recon Analytics, BI Intelligence

5 year trailing CAGR





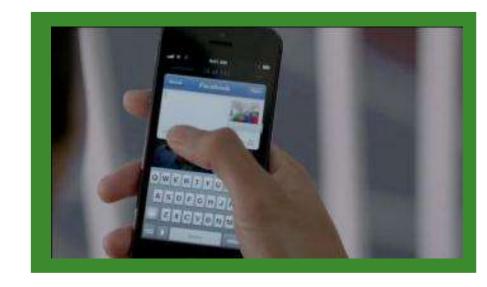
Phablet ownership breakdown



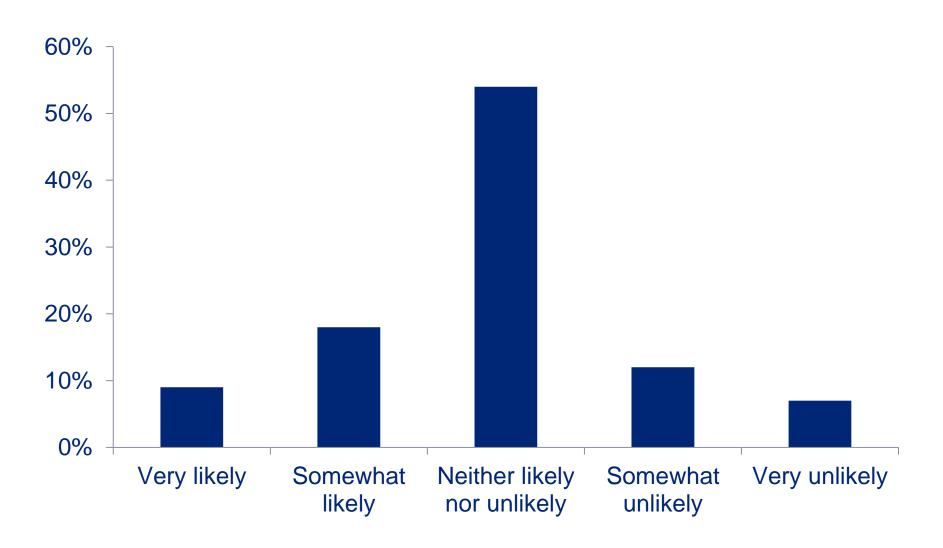




"only" 25%

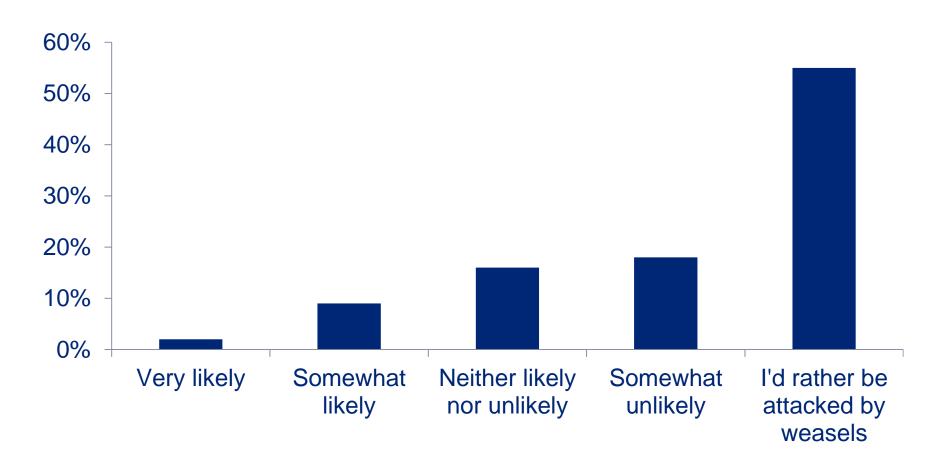


After seeing TMT Predictions, how likely are you to spend more money with Deloitte? (normal distribution)



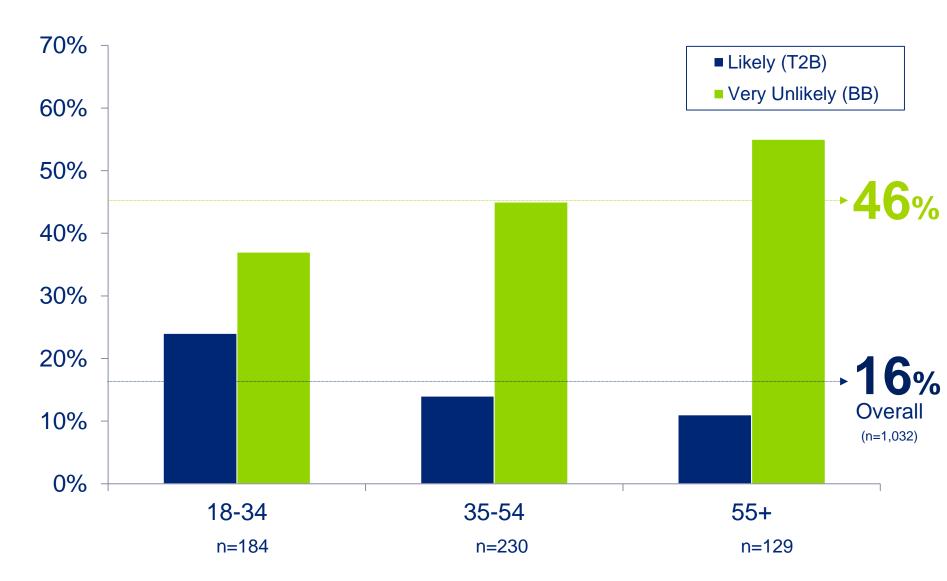
Thinking about your next mobile device, how likely are you to purchase a phablet? (55+ only, n=351)





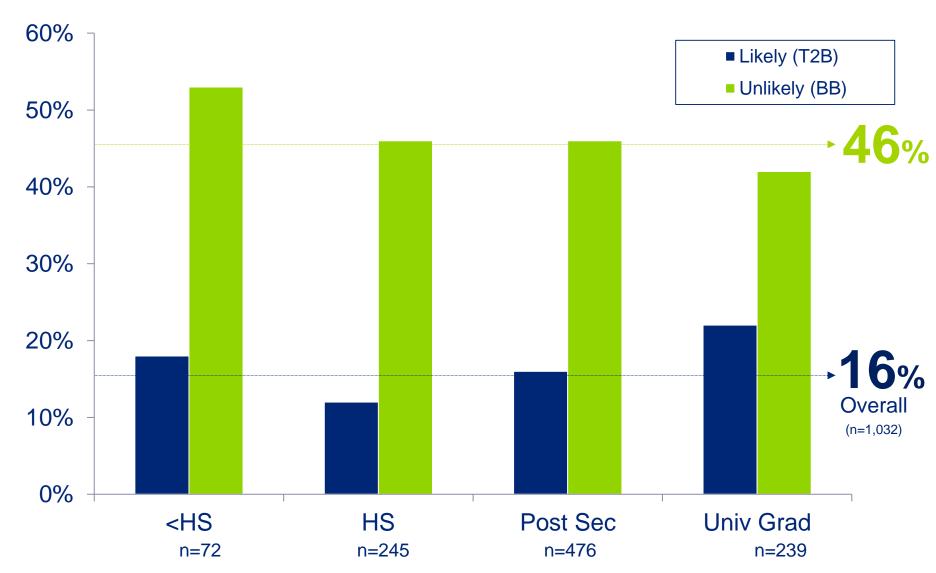
Phablet intent to purchase as next mobile device



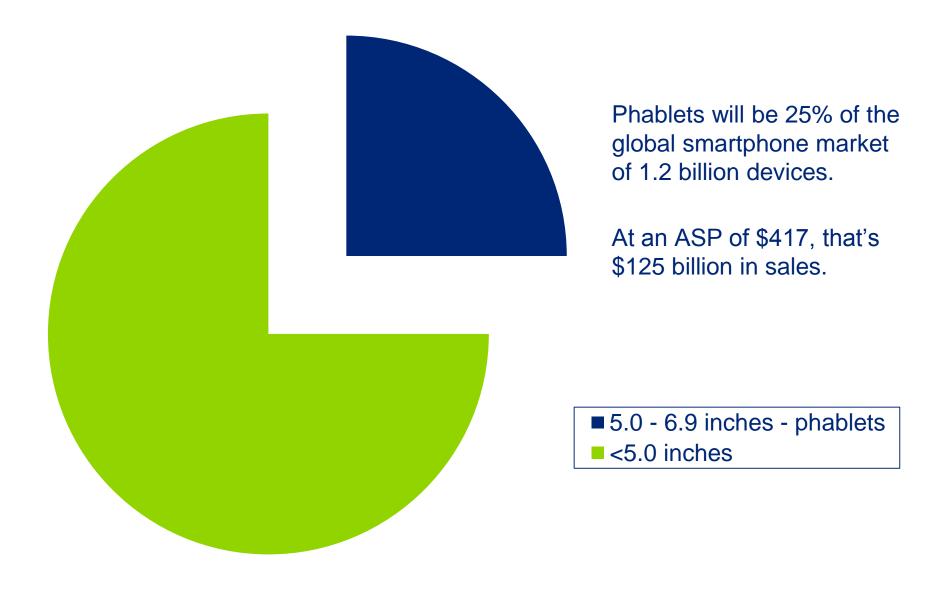


Phablet intent to purchase as next mobile device (cont'd)

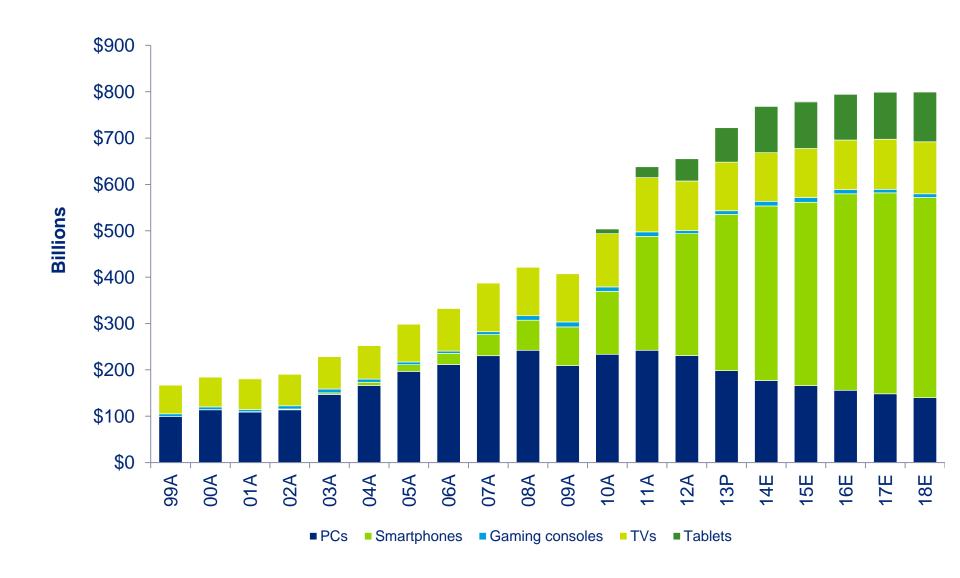




Global smartphone sales

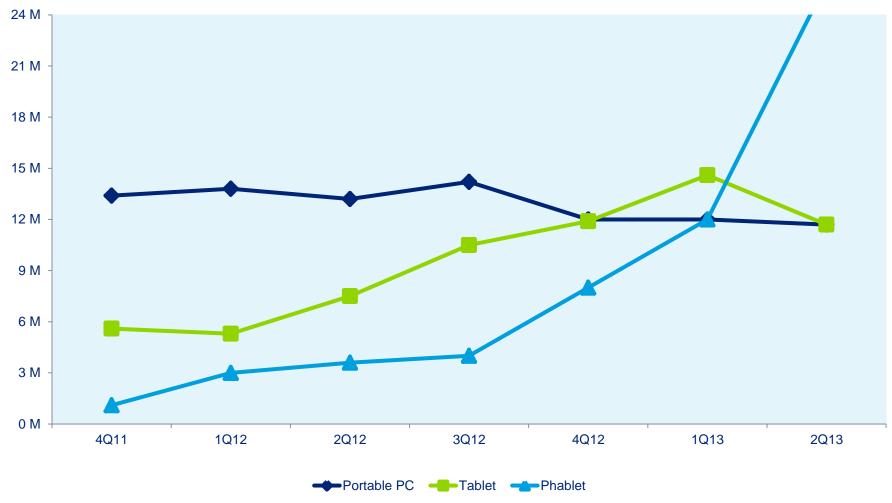


Putting \$125B in context



APEJ portable PC, tablet and phablet shipments, 2011 Q4-2013Q2

Unit Shipments



KANJI

安以宇衣於

阿伊宇江於

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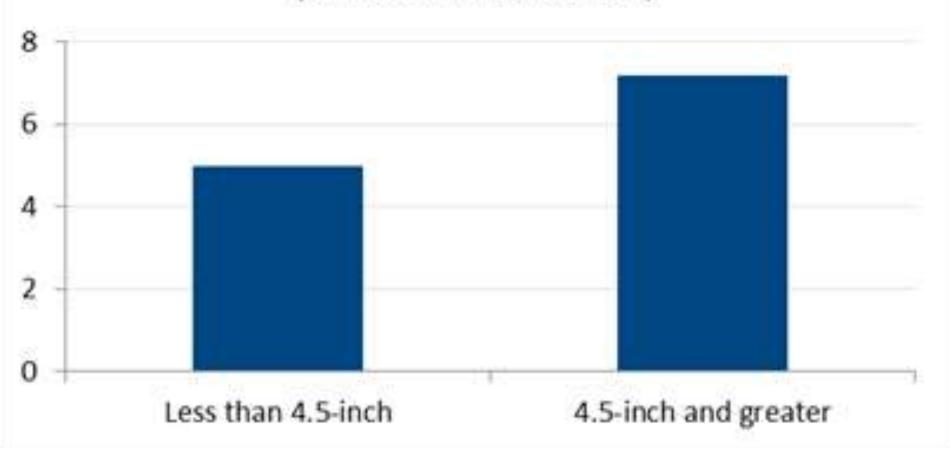
アイウエオ

HIRAGANA

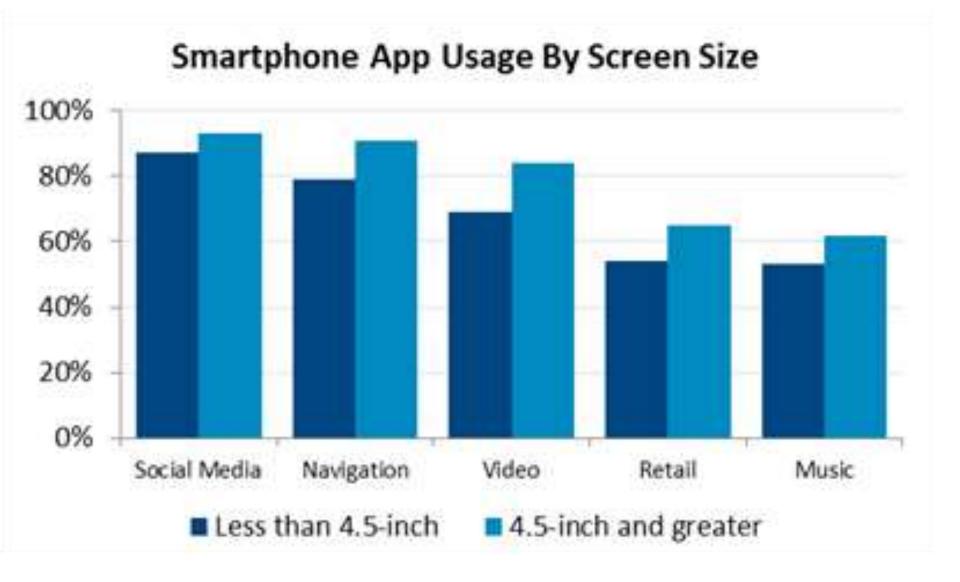
KATAKANA

Smartphone Data Usage By Screen Size

(Wi-Fi & Cellular Data in GB)



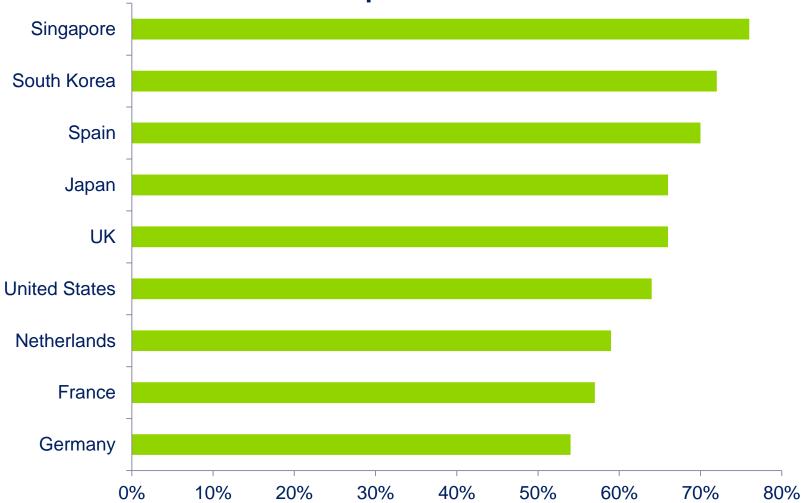
Source: The NPD Group, Inc. / Connected Intelligence / Smartphone Usage Report, 3 months ending July 2013



Source: The NPD Group, Inc. / Connected Intelligence / Smartphone Usage Report, 3 months ending July 2013



Proportion of phablet owners having a smaller smartphone too

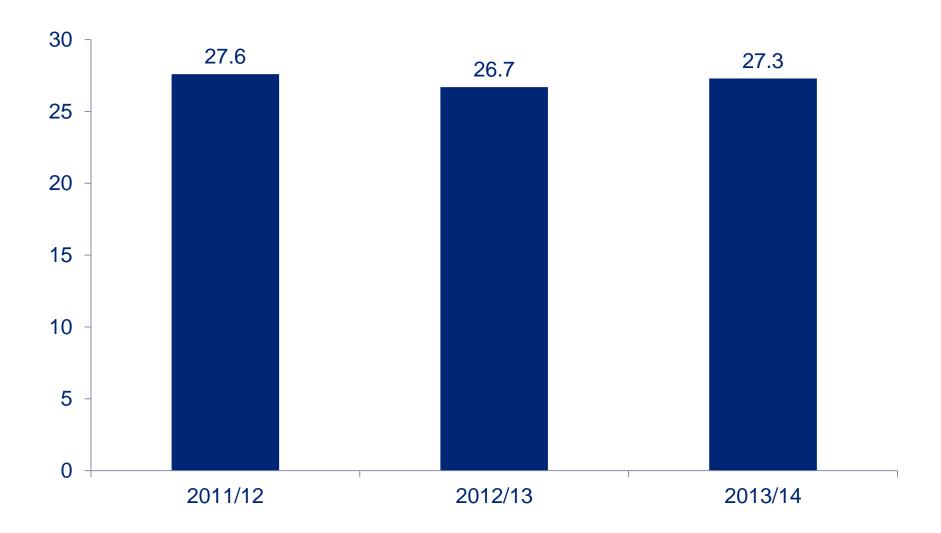


Source: Deloitte Global Mobile Consumer Survey, Developed countries, May-June 2013

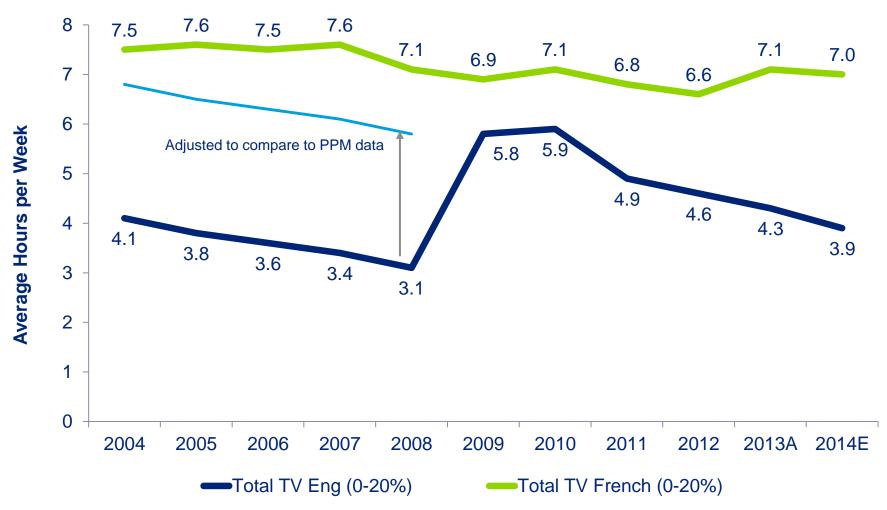
Base: All Smartphone owners: 16, 378, Smartphone owners 12,313, Large smartphone owners 8,269



Hours of traditional TV watched per week by all Canadians aged 2+



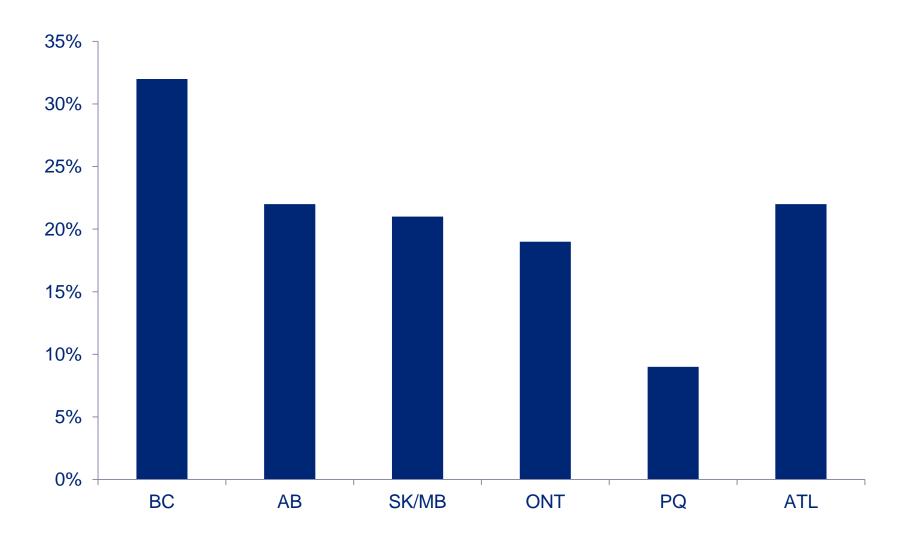
0–20% Quintile – average hours per week



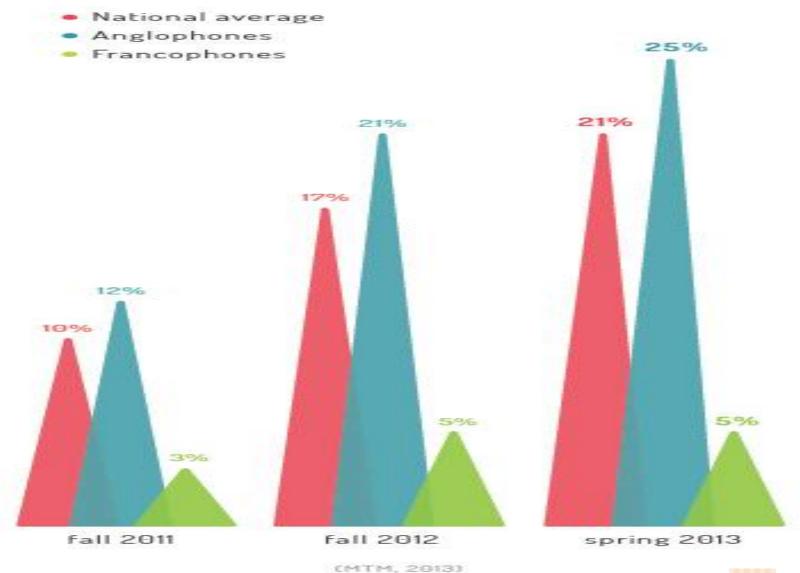
Source: BBM Canada, P2+, Each year defined by 4 November weeks, M-Su 2a-2a *PPMs introduced for Total TV Eng in 2009

Canadians who are currently subscribing to video subscription service (i.e. Netflix) or are in first free month



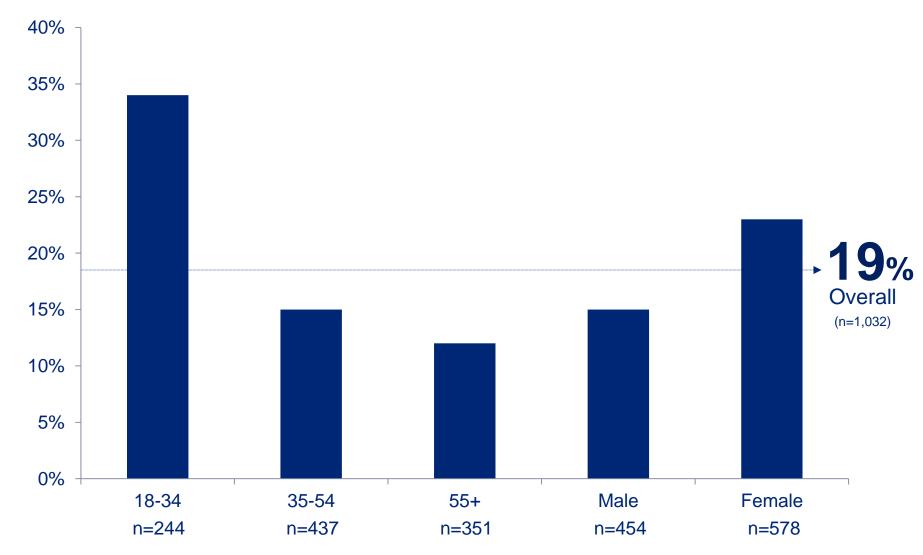


NETFLIX SUBSCRIBERS



Canadians who currently subscribe to a video subscription service (i.e. Netflix) or are in the free first month

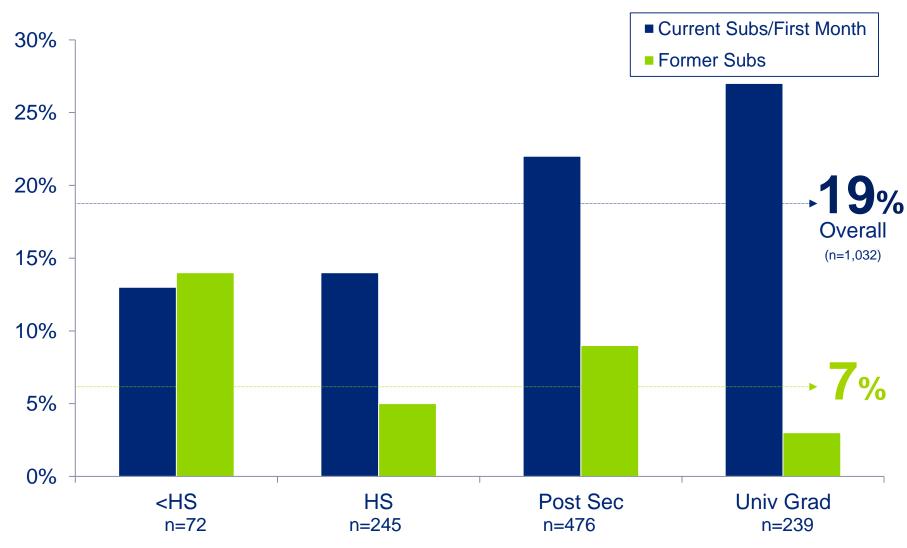






Video subscription services (i.e. Netflix)





H1 2014 North American Fixed

Rank	Upstream		Downstream		Aggregate	
	Application	Share	Application	Share	Application	Share
1	BitTorrent	24.53%	Netflix	34.21%	Netflix	31.09%
2	HTTP	14.27%	YouTube	13.19%	YouTube	12.28%
3	SSL	6.54%	HTTP	11.65%	HTTP	11.84%
4	Netflix	6.44%	iTunes	3.64%	BitTorrent	5.96%
5	YouTube	5.52%	SSL	3.42%	SSL	3.80%
6	Skype	2.23%	BitTorrent	3.40%	iTunes	3.33%
7	Facebook	2.17%	MPEG	2.85%	MPEG	2.62%
8	FaceTime	1.50%	Facebook	1.99%	Facebook	1.83%
9	Dropbox	1.20%	Amazon Video	1.90%	Amazon Video	1.82%
10	iTunes	1.15%	Hulu	1.74%	Hulu	1.58%
		64.40%		76.24%		74.58%

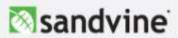


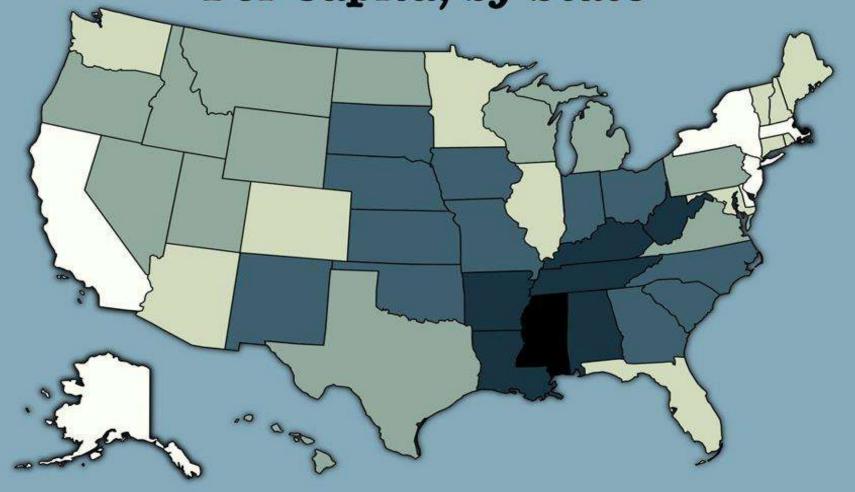
Table 2 - Top 10 Peak Period Applications - North America, Fixed Access



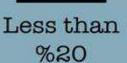




United States Passport Ownership Per Capita, by State









More than %20



More than %30



More than %40

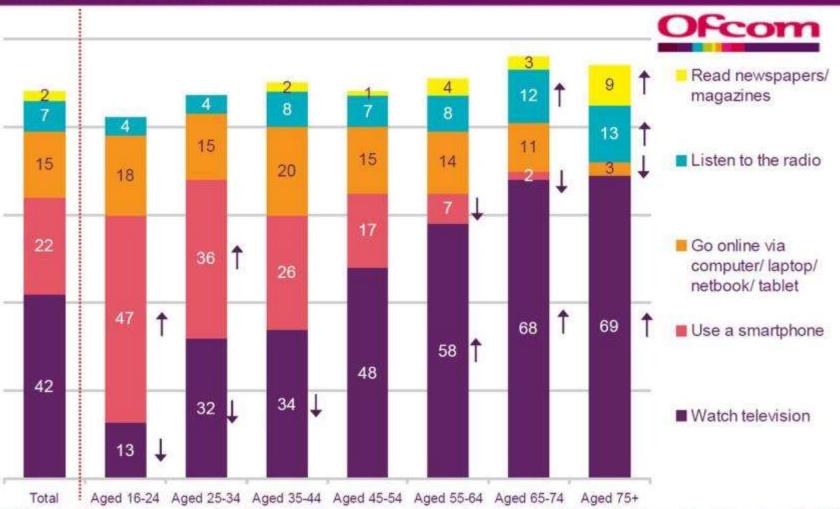


More than %50



More than %60

Figure 3.9.2: Most-missed media - top five mentions among all adults, by age: 2013



A2 - Which one of these would you miss doing the most? (Prompted responses, single coded) - NB Showing the five most popular responses in 2013 at an overall level

Base: All adults aged 16+ (1642 aged 16+, 224 aged 16-24, 260 aged 25-34, 270 aged 35-44,226 aged 45-54, 262 aged 55-64, 211 aged 65-74, 189 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+ Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

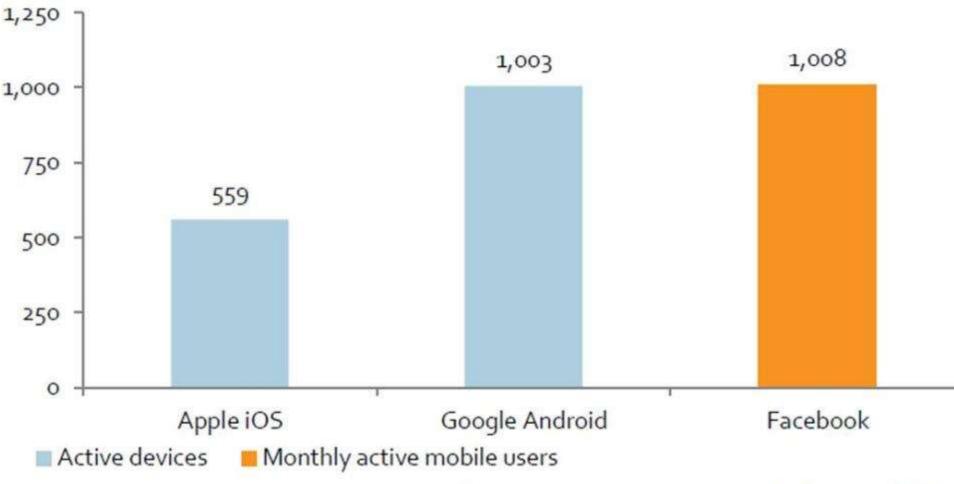


3 Million Teens Leave Facebook In 3 Years: The 2014 Facebook Demographic Report



	Jan '11 (millions)	Jan '14 (millions)	Change (millions)
US 13-17	13.1	9.8	-3.3
US 25+	88.3	128.0	+39.7

Figure 1: Estimated active installed base, March 2014 (m)



[Source: companies, Gartner, Enders Analysis]

Social is where the PC was in 1993



TMT Predictions tailored events



Deloitte.